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UPDATE OF THE 2015 PERCEPTION STUDY:

Final Report. Volume II



2021

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(Executive summary and
Volume I)**

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Condensed presentation of the Update Study

Analytical framework
Analysis of key audiences and target groups

Analysis by key research criteria
Aggregated recommendations

Socio-demographic indicators
Country-specific recommendations

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Country chapters

1.1. Brazil

This Country Chapter presents a synthesis of the Brazil-specific findings based on traditional and social media analyses, interviews with multipliers and influencers, focus groups with university students and a public opinion poll – all conducted in the framework of the Update Study 2021. The structure of the chapter follows the logic of the research design. We present the main findings for Brazil according to the research indicators guiding the 2021 Study: visibility, actorness, local resonance; and norm-setting. We also discuss findings according to the themes analysed in this study: economy and trade; political issues; development; social issues; environment; energy; science, research and technology; culture; education and health. The penultimate section looks at the drivers behind perceptions of the EU and Europe in Brazil. We conclude the chapter with recommendations for the EU's public diplomacy in 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.

1.1.1. Sample

Public opinion

The online survey was coordinated and conducted by PPMI through an online panel provided by Syno International¹. The respondents in Brazil were surveyed in Portuguese. The data collection took place from 28 April to 16 May 2021. The sampling for the survey was designed to be nationally representative of age, gender and regions. Respondent profiles in the Brazil were established based on data from the Brazilian Institute of Geography and Statistics.² The survey included a total of 1150 individuals aged between 15 and 64 years old³.

Media

The quantitative part of the media analysis which identifies the general trends in a large press media sample was carried out by PPMI. The study monitored five popular daily newspaper in Brazil: *O Globo*; *Folha de São Paulo*; *O Estado de São Paulo*; *Correio Braziliense*; *Zero Hora* and one business newspaper *Valor Economico* from 1 February to 30 April 2021. The *Factiva* repository was used to aggregate content from both licensed and free sources, and in-house data processing was applied to produce the results.

The dataset consists of two parts, collected in Portuguese during the observation period: the “EU” dataset (821 articles) and the “Europe” dataset (1608 articles). Search terms for the dataset “EU” are: “European Union”, “EU”, “European Commission”, “European Parliament”, “Court of Justice of the European Union”, “EU presidency”, “EU Council”, “European Council”, “Council of the European Union”, “Eurozone”, “European Central Bank”, “European Investment Bank”, “European Medicines Agency”. The search terms for the dataset “Europe” are “Europe”, “European” and “Europeans”. The search terms for “EU” and “Europe” datasets consider both plural and singular forms as well as possible grammatical forms of the search terms in the local language. Europe dataset excludes articles containing any of the “EU” dataset keywords.

The qualitative media content analysis of news that reported the EU as a major focus/theme (97 articles) was designed, supervised and coordinated by experts from the Public Diplomacy and Political Communication Forum (PD-PCF), University of Canterbury (UC), New Zealand, and conducted by Country Experts trained by the PD-PCF, UC. PPMI collected the media sample using the search engine for the in-depth qualitative content analysis from two prestigious newspapers *O Globo*; *Folha de São Paulo* and the business newspaper *Valor Economico*. The timeframe of observation remained the same as for the quantitative and social media analyses. Country experts analysed the EU image created by applying elements of content, cognitive and critical discourse analyses.

Social media

PPMI carried out the social media analysis. The data collection process was automated using the online social media monitoring tool *Mediatoolkit*. Social media posts were collected from Twitter, Facebook and Instagram with the use of automated queries. Coverage of the EU was traced using a set of the EU-related keywords: “European Union”, “EU”, “European Commission”, “European Parliament”, “Court of Justice of the European Union”, “CJEU”, “EU presidency”, “EU Council”, “Council of the European Union”, “European Council”, “Eurozone”, “European Central Bank”, “European Investment Bank”, “European Medicines Agency”. All the keywords were additionally traced in one-word format to capture related hashtags: europeanunion, europeancomission, europeanparliament, courtofjusticeoftheeuropeanunion, eupresidency, eucouncil, europeancouncil, counciloftheeuropeanunion, europeancentralbank, europeaninvestmentbank,

¹ Syno International: <https://www.synoint.com/>

² Brazilian Institute for Geography and Statistics, http://www.abc.gov.br/training/informacoes/InstituicaoIBGE_en.aspx.

³ Detailed public opinion survey data are available in Annex II of this Report – Comparative public opinion survey report.

europeanmedicinesagency. Europe-specific keywords used for filtering relevant social media posts are “Europe” and “European”. Europe dataset excludes posts containing any of the “EU” dataset keywords.

The mentions were filtered through a location filter to ensure that the collected mentions originate from Brazil. A language filter was set up to collect posts in English and Portuguese. The resulting sample of Brazilian social media posts collected from 1 February to 30 April 2021 includes 188,205 mentions, of which 41,006 mention the EU (74% in Portuguese) and 147,199 mention Europe (91% in Portuguese).

Working with social media platforms, the Project Team followed each platform’s terms of use. All identifiable information of individuals from social media data remains confidential and is removed before publication of findings. Computational analyses of the large number samples involve only contents from media databases’ public websites and non-private social media accounts – that is, posts that are available to public audiences. No generalised conclusions that might cause any potential harm will be drawn from social media analyses on identifiable communities.

Interviews and focus groups

Interviews with local opinion- and decision-makers as well as focus groups with students were conducted by the Country Experts, with training support and supervision from PD-PCF, UC, following the approval of the UC Human Ethics Committee. As part of this study, interviews and focus groups aim to provide in-depth explanations about Brazilian perceptions of Europe and the EU and cross-reference the findings from the public opinion survey, traditional and social media analyses.

The sample of the focus group includes 8 final-year BA students (3 male and 5 female), from Pontifícia Universidade Católica do Rio de Janeiro (PUC-Rio): 5 students majoring in international relations, 1 in philosophy (with a focus on environmental studies) and 2 in media studies. Except for 2 students, all had personal experiences with/in Europe: 2 spent a year in exchange programmes in EU countries (France and Germany), 4 visited several EU countries as tourists (Portugal, Spain, France, Germany, Austria, the Netherlands, Italy, Czech Republic, Slovakia, Croatia, Greece and Hungary) and mention that they have met and interacted with European students in school or at university; 3 are in contact with family from/living in Portugal.

The sample of the expert interviews includes 12 experts (2 male and 10 female); 2 from media (1 editor and 1 journalist); 2 academics; 3 government officials (1 from the Ministry of External Relations, 1 from the Brazilian Agency of Cooperation and 1 from the Ministry of Science, Technology, Innovation and Communications); 4 from civil society (1 from think tank, 1 from NGO, 1 philanthropic organisation, 1 from the network of NGOs) and 1 from the National Industries Confederation, to cover the business sector).

Semi-structured, anonymous qualitative group interviews under Chatham House Rule were conducted with all EU Delegations across the 13 key partner countries. Interviews lasted between 60 to 90 minutes. The group interview with representatives of the EU Delegation to Brazil was conducted on 15 March 2021 by members of the Core Team (PD-PCF, UC and PPMI) and the Country Experts.

1.1.2. Visibility

In the eyes of the Brazilian public, the overall visibility of the EU has increased when compared to the 2015 Study. While in 2015, about 6% of respondents answered “Do not know/ cannot answer” to the question about how positive or negative they feel about the EU, in 2021, the share has reduced to 2.3%. In the same survey, the EU ranks as the fifth most visible actor and *before* the regional organisation of MERCOSUR (which in 2015 was more visible than the EU). However, the US, China, Japan and the UN appear more visible than the EU as international actors, with only 1.1%, 1.2%, 1.8% and 2.1% of

respondents answering “Do not know/ cannot answer” about whether they feel positively or negatively about these actors respectively.

As for the terms associated with the EU, survey respondents react positively. They see the EU as modern (47.8%), strong (45.3%), efficient (42%), peaceful (31.8%) and united (31.4%) – a significant improvement from 2015, when 25% of Brazil respondents perceived the EU as modern, 33.8% as strong, 25.9% as efficient, 12% as peaceful and 19.3% as united. However, Japan, the US and China are considered more modern than the EU: 75.8%, 68.4%, 52.3% respectively. The US, Russia and Japan are considered stronger (58%, 52.1% and 51.5% respectively). Japan and China have a better record for efficiency (57.8% and 42.1%), while Brazil, Japan and India are seen as more peaceful (37%, 34.4% and 31.9% respectively). Only Japan scores better for unity (36.4%). As for the negative terms, 5.4% of survey respondents find the EU arrogant, 4.7% aggressive and 3.1% hypocritical. These figures are lower than in 2015, when 13.7% of respondents considered the EU arrogant, 7.8% aggressive and 9.2% hypocritical.

The findings of the public opinion survey contrast the findings of the literature review (Pew 2019) and expert interviews in this Study. Both sources indicate a low level of awareness about the EU among the general public. Some experts in particular feel a strong lack of knowledge and awareness about the EU in Brazil: ‘Brazilian population does not know anything [about the EU]; very few people know something. I myself did not know much about it’; ‘The population is not aware of these programmes I mentioned [in the areas of RST]; the Brazilian population is not interested in science, so this kind of information does not go to the public’. But at least one expert disagrees: ‘today we know more about the EU, there is more information, debates, about elections, the migration question, more visible in the new medias, podcast, streaming’. The focus group participants also reveal a higher level of awareness of the EU: students list specific EU public diplomacy initiatives and policies in Brazil, such as Erasmus+ and Jean Monnet Chairs as well as Model EU simulation events, supported by the EU Delegation to Brazil and organised by International Relations students at PUC-Rio.

As for other actors, most experts mention the US, China and MERCOSUR as the most relevant international actors in Brazil at present. One expert considers ‘China active and attractive, but there are more difficulties regarding culture and language’, resonating with another perception that the ‘EU finds more sympathy than the US, but China finds less resistance and it is seen as more pacific, but has less cultural influence’ (CSO1). Another expert finds China more modern than the EU, which is strongly associated with the ‘old continent’: ‘the idea of the EU as an old continent’, despite its ‘modernisation’ (CSO3).

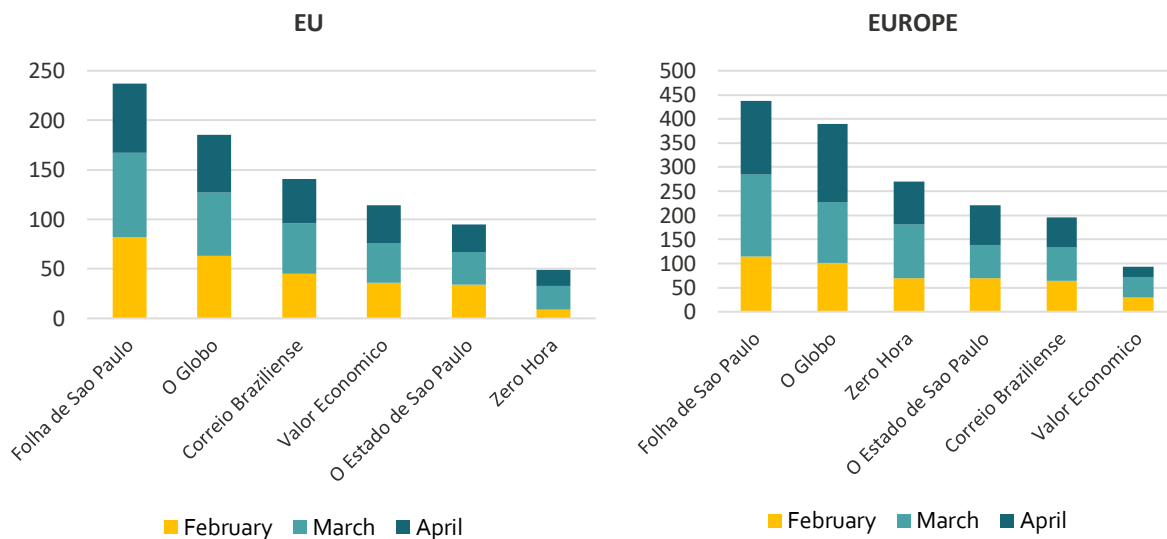
EU activities that receive a more positive evaluation in the 2021 survey compared to 2015 are tourism (63.6%), science and research (59.6%), development of new technologies (58.8%), global trade (57.7%) and industrial development (55.6%). There is an increase in positive evaluations across all of these domains when compared to 2015, when numbers were 52% (tourism), 43.6% (science and research), 38.2% (development of new technologies), 40.4% (global trade) and 40.8% (industrial development). Most EU activities score “very good”, “fairly good” or “neutral”; among those evaluated as “fairly bad” and “very bad”, the three most mentioned activities are space exploration (4.5% and 0.9% respectively; agriculture (4.4% and 1.4%) and global health (3.0% and 1.4%). As for the “do not know” category, most activities rank between 3% and 4%. The highest scores are given to space exploration (5%), financial services and banking (4.5%) and agriculture (4.4%). In 2015, the highest scores on the “do not know” category were given to green technologies (12.5%), space exploration (12.2%) and agriculture (11.5%).

The frequency of hearing or reading about the EU (on TV, radio, internet, newspapers or simply by word of mouth) according to the survey is slightly higher than in 2015, which might help explain the EU’s increased visibility in 2021: 33.3% of survey participants hear or read about the EU “more or less every day” (compared to 28.6% in 2015), 35% “about once a week” (in 2015 – 35.6%), and 12.8% “about

once a month” (in 2015 – 11.9%), so, a cumulative total of 81.7% hear about the EU at least once a month (as opposed to 76.1% in 2015). In 2021, only 1.8% choose the “do not know” option (compared to 6.9% in 2015), 2.7% “never” (4.5% in 2015), and 13.8% “rarely” (12.5% in 2015).

Overall, the traditional *media* (press) coverage of “Europe” is significantly higher throughout the observed period than that of the EU and its institutions (66% vs. 34% of the total sample respectively).

FIGURE 1. VOLUME OF NEWS ITEMS WITH A REFERENCE TO THE EU AND EUROPE IN TRADITIONAL MEDIA. BRAZIL



Note: based on automated quantitative data analysis. Includes press articles which report on the EU and Europe as a principal or secondary subject of the article.

Data shows that the “EU” dataset has similar *media* visibility in February (32.8%) and April (31.1%) and slightly higher in March (36.2%), due to the news about anti-COVID vaccines, in particular, the EMA’s approval of the Johnson & Johnson vaccine, exclusion of Sputnik from the EU’s vaccination strategy, restrictions on the use of AstraZeneca (AZ) by EU Member States and discussions of a vaccine travel pass. The coverage for “Europe” is slightly lower in February (27.8%) than in March (36.6%) or April (35.6%).

The quantitative analysis of EU news demonstrates that the share of articles with a major degree centrality for the EU is moderately low for all traditional media outlets in Brazil, ranging from 12.2% (*Zero Hora*) to 26.2% (*Folha de Sao Paulo*). The low degree of centrality in the quantitative analysis shows that the EU and its institutions are not profiled as main actors in the news coverage. The qualitative analysis that focuses on the news about the EU as a major topic finds that most EU-related news published in the business daily *Valor* is placed in the World News section, rather than Economy or Finance, and cover a wide range of topics (mostly politics and health, followed by, in order, economy, normative, environment and RST). *O Globo* and *Folha* follow the same placement pattern. Most of the articles that portray the EU as a central topic are of average length.

Similar to traditional media, the visibility of Europe in social media is higher than that of the EU. There is a peak of Europe-related posts on 19 April 2021 linked to the discussion around the creation of a European Super League and a peak in EU-related posts on 30 April 2021 generated by retweets of the tweet about a hearing in the European Parliament. The hearing was critical of President Bolsonaro’s

handling of the COVID-19 pandemic, deemed disastrous by some MEPs. The original tweet reads: ‘Bolsonaro will be condemned in international courts for crimes against humanity. Unfortunately, these processes take years. However, look at images from today in the Parliament of the European Union. And see the truth, before it is too late. In 2022, this man MUST fall!’.⁴ Therefore, the higher coverage of the EU in social media is due to *country-specific* factors, whereas the higher coverage of the EU in traditional (press) media is due to *EU-related* factors.

Visibility of EU institutions and EU leaders. Visibility of Member States and their leaders

In both “EU” and “Europe” press datasets, among the EU institutions, the European Commission is mentioned the most: 104 times in the final media sample. The qualitative media analysis reveals that the European Commission is referenced in the context of concerns about democratic backsliding in Poland and Hungary (freedom of press); the mistreatment of Commission President Ursula von der Leyen during an official visit to Turkey; EU sanctions against China for HR violations in Xinjiang; Iran’s refusal to accept an EU invitation to participate in informal talks on the country’s nuclear programme; EU support for Ukraine in the context of Russian military deployment to the country’s border; and COVID-related news, including vaccine procurement. The media pays slightly less attention to the EMA (97) (in the context of COVID-related news), European Central Bank (72) (mainly Former ECB President Mario Draghi becoming Italy’s Prime Minister), European Parliament (43) and European Council (27). Other EU institutions are not mentioned in the media (press) articles, and the visibility of EU officials matches the visibility of EU institutions they represent. Hence, the most visible EU officials are Ursula von der Leyen; Mario Draghi and Charles Michel (mostly his lack of action to prevent von der Leyen’s mistreatment in Turkey).

In 2015, the most cited EU institution was the European Central Bank, followed by the European Commission – both appearing in the context of the Greek debt crisis. Jean-Claude Juncker, the then President of the European Commission was the most visible EU official, featuring in articles about the Greek debt crisis and EU policies on migration after migrant deaths in the Mediterranean, followed by Donald Tusk of the European Parliament and Mario Draghi of the ECB (in news about Greece).

The most visible EU Member States in the qualitative media analysis are France and Germany (in the context of COVID-related news), Italy (Mario Draghi becoming Prime Minister of the country), and Hungary (for curtailing press freedom and administering the non-EMA approved Sputnik vaccine). In 2015, due to the Greek debt crisis, by far the most mentioned member state was Greece, followed by Germany (which was usually mentioned in the context of negotiations with Greece). The UK ranked third reflecting the British General Election. France was also mentioned in the context of the Greek crisis and in articles about the rise of far-right parties in the country. While the EU crises are now different, Brazilian media continues to put emphasis on Germany and France.

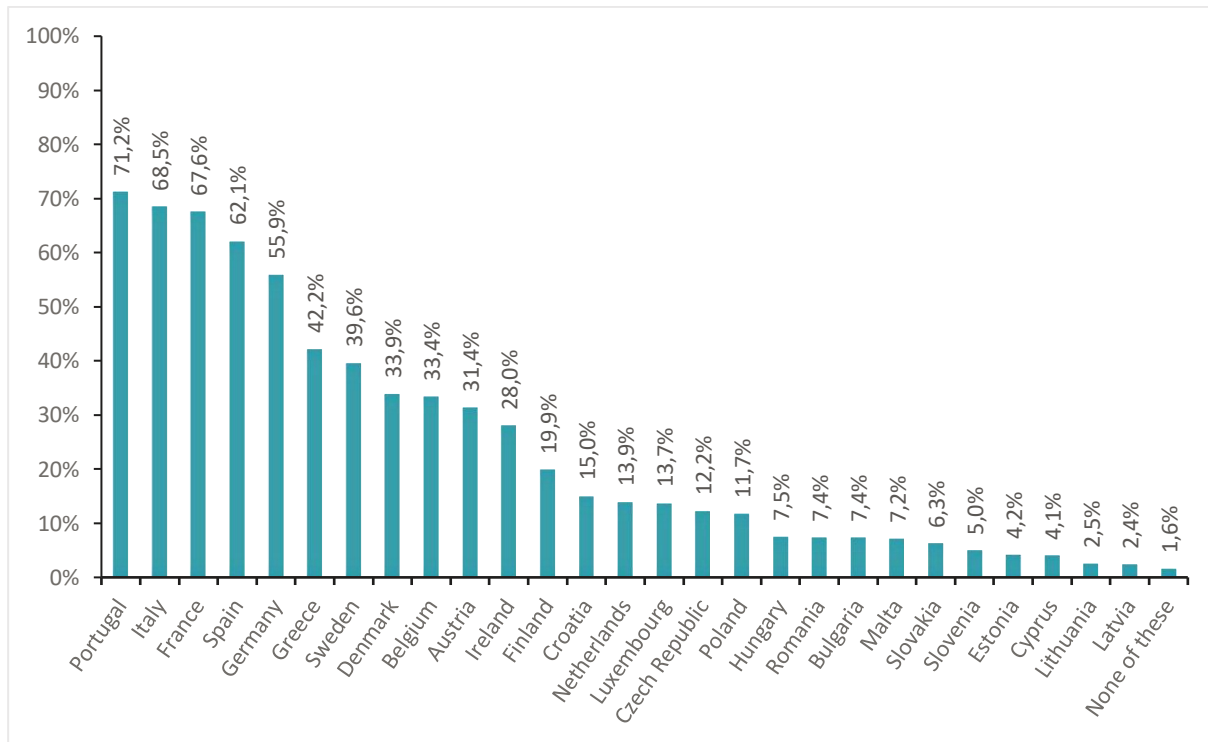
In Brazilian *social media*, among the EU institutions, the European Parliament receives most mentions (10,419). The EMA (895), the European Commission (459) and the European Central Bank (165) receive some mentions. In Brazilian *social media* posts, Italy (3,979), France (3,058), Spain (2,457), Germany (2,936), and Portugal (1,745) are the most mentioned Member States. As for Member State leaders and EU officials, Ursula von der Leyen is mentioned the most (186), and Angela Merkel second (153), and Macron (26) and Charles Michel (23), at a much lower level.

In the public opinion survey, more than half of the respondents consider Portugal (71.2%), Italy (68.5%), France (67.6%), Spain (62.1%), and Germany (55.9%) the most attractive European countries. The least

⁴ “Bolsonaro será condenado nos tribunais internacionais por crimes contra a humanidade. Infelizmente, esses processos levam anos. Porém, vejam imagens de hoje no Parlamento da União Europeia. E vejam a verdade, antes que seja tarde demais. Em 2022, esse homem TEM que cair!”

attractive, with a share below 5%, are Latvia (2.4%), Lithuania (2.5%), Cyprus (4.1%) and Estonia (4.2%). In 2015, these same five countries were considered the most attractive, yet in a different order: Italy (66.4%), France (66.2%), Portugal (60.6%), Germany (60.4%) and Spain (59.3%). The least attractive countries in 2015 were also Cyprus (2.7%), Latvia (3.1%), Estonia (3.5%) and Lithuania (3.6%).

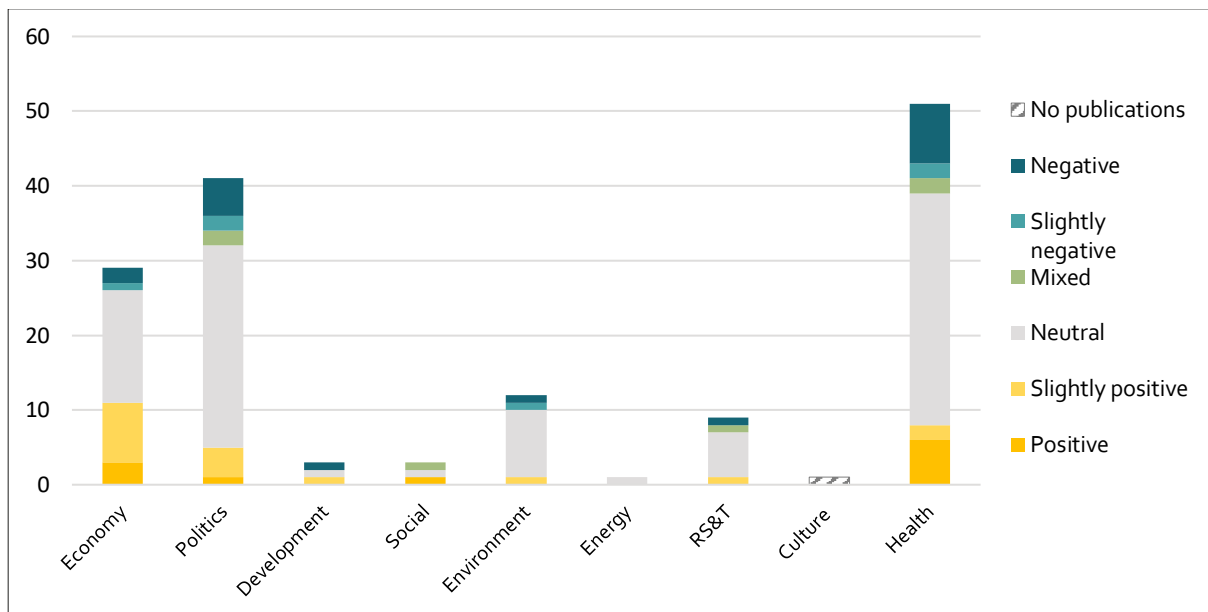
FIGURE 2. ATTRACTIVENESS OF THE INDIVIDUAL EU MEMBER STATES. BRAZIL



Note: based on Q25: Please indicate which European countries look the most attractive to you? Respondents could choose more than one country (n=1150). Respondents were not limited in the number of countries they could name.

In the interviews, the most visible Member States for the educated youth are Germany, France, Spain, Portugal (for travel, study and family ties), Hungary and Poland (democratic crisis) and Greece (economic crisis). The only EU institution mentioned by students is the EU Delegation to Brazil. Mentions among the experts vary but the most mentioned Member States are Germany (for economic reasons, technology, technical cooperation, RST, environment), Portugal (RST, family ties), France (economy, agriculture), Italy (cooperation, family ties), Spain (education), Hungary and Poland (democratic crisis) and Greece (economic crisis). As for agencies, few were mentioned, mostly Commission DGs, the EU Delegation in Brasília and one reference to the European Parliament.

Emotive charge

FIGURE 3. EMOTIVE CHARGE IN PRESS ARTICLES REPORTING ON THE EU AS A PRINCIPAL SUBJECT. BRAZIL

Note: Based on qualitative media analysis conducted by country experts. One article can reflect more than one theme.

The quantitative analysis of the *traditional media* (press) indicates that in 2021 as in 2015 in all thematic frames, the majority of articles about the EU are neutral. The exception are articles about the EU's handling of the COVID-19 pandemic where EU actions are framed negatively through emotionally loaded descriptors such as: 'European failure'; 'fiasco'; 'EU countries devastated by COVID variants'; 'EU countries are far behind in vaccination campaigns compared to the UK and the US'. A positive evaluation in this frame though is attached to the image of EU solidarity: 'European solidarity makes it is imperative to help other countries in order to save lives'; 'the EU has acted more based on the concept of solidarity than the UK and the US'.

In contrast to traditional media, in *social media*, the emotive charge of the EU-related posts is largely negative (47.7%), followed by positive (25.4%) and neutral (26.9%). The emotive charge of Europe-related posts is more balanced: 35.5% positive, 30.9% neutral and 33.6% negative.

The experts' image of the EU is overall positive, despite criticism of 'hyper-regulation', protectionism, excessive bureaucracy, colonial attitudes, lack of solidarity with the rest of the world in the COVID-19 pandemic, and lack of action against undemocratic practices by Bolsonaro's government.

The focus group's image of the EU is mixed: on the one hand, most students consider the EU an example of democracy, social and environmental protection and equate it with development, good quality of life, cultural and intellectual richness, strong institutions and diversity. On the other hand, there are negative views of EU's restrictive migration policies and democracy and human rights violations inside the bloc.

Continuity and change behind visibility and emotive charge

The public opinion poll indicates that the EU is more visible and more positively evaluated compared to 2015. Brazilian respondents consider the EU more modern, efficient, peaceful, united and stronger than in 2015, and less arrogant, aggressive and hypocritical. The press coverage of the EU now appears

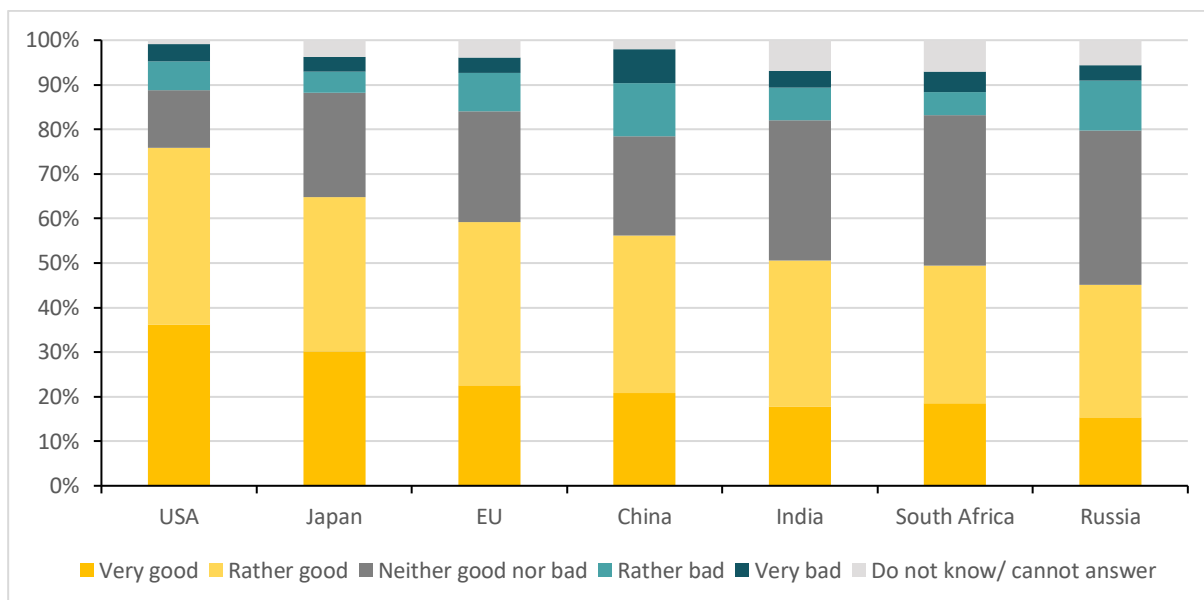
less emotively charged. In the 2015 press analysis, negative evaluations of the EU dominated – in reference to the Greek debt crisis, irregular migration crisis and EU policies on migration. Interviews with experts in 2021 reveal mixed perceptions and emotions. For instance, one expert states that ‘We see an increase of Euroscepticism there and also here, we lost the “excitement” with the potential of regional organisations’; but others count on the EU and its valued-based approach to improve the current political situation in Brazil: ‘The political dialogue must be stronger and set the direction of the relations, not European transnational corporations, especially in the context of deteriorating human rights and democracy in Brazil – this must change!’. The dominant perception in 2021 youth focus group is that the EU is ‘falling apart’. However, they also expect (and wish) that the EU would step up its global leadership role in environment and climate change to the benefit of Brazil. This contrasts with the 2015 findings, when experts and youth shared negative perception of the EU as arrogant, presenting itself as a model (despite ensuing crises), and with a “hearing” problem, refusing to accept norms and values of other partners.

1.1.3. Actorness and local resonance

The general evaluation of the EU as a partner to Brazil is positive: 59.2% of survey respondents think the relationship with the EU is “very good” (22.5%) or “rather good” (36.7%), which places the EU behind only the US (79.8%) and Japan (64.4%) and before China (56.2%), India (50.6%), South Africa (49.3%) and Russia (45.1%). This is an improvement from 2015, when 57.2% of respondents described the overall relationship with the EU as “very good” (16.1%) or “rather good” (41.4%). The survey also indicates that, in 2021, 78.2% of Brazilian respondents think that the EU should have stronger political ties with Brazil (43.3% “strongly agree”, 34.9% “agree”, 3.7% “disagree”, 0.8% “strongly disagree”) – an increase from 2015, when 68.5% of respondents agreed with the statement. Furthermore, in 2021, 62.2% think the EU is a trustworthy partner (25.7% strongly agree, 36.5% agree, 5.4% disagree and 1.8% strongly disagree) – a higher percentage than in 2015, when 54.9% thought the EU was a trustworthy partner. In addition, the EU is considered an important partner in the area of education exchanges for 72.8% of the population (35.2% strongly agreed, 37.6% agreed; only 4.8% disagreed, and 0.8% strongly disagreed). In 2015, numbers were similar (72.6% agreed that the EU is an important partner for education). Finally, 71.1% of Brazilian agree that the EU is an important partner in international relations to Brazil (32.5% strongly agree and 38.6% agree, 5.4% disagree and 1.4% strongly disagree). However, in 2015, these numbers were slightly higher: 81.1% of respondents agreed then that the EU is an important partner in international relations to the country. The “do not know” response received about 3% for all 4 statements. Therefore, in 2021, more respondents have an overall positive evaluation of the EU and think that the EU is trustworthy and *should* have stronger political ties with Brazil than

in 2015, but fewer respondents think that the EU *actually* is an important partner to Brazil in international relations when compared to 2015.

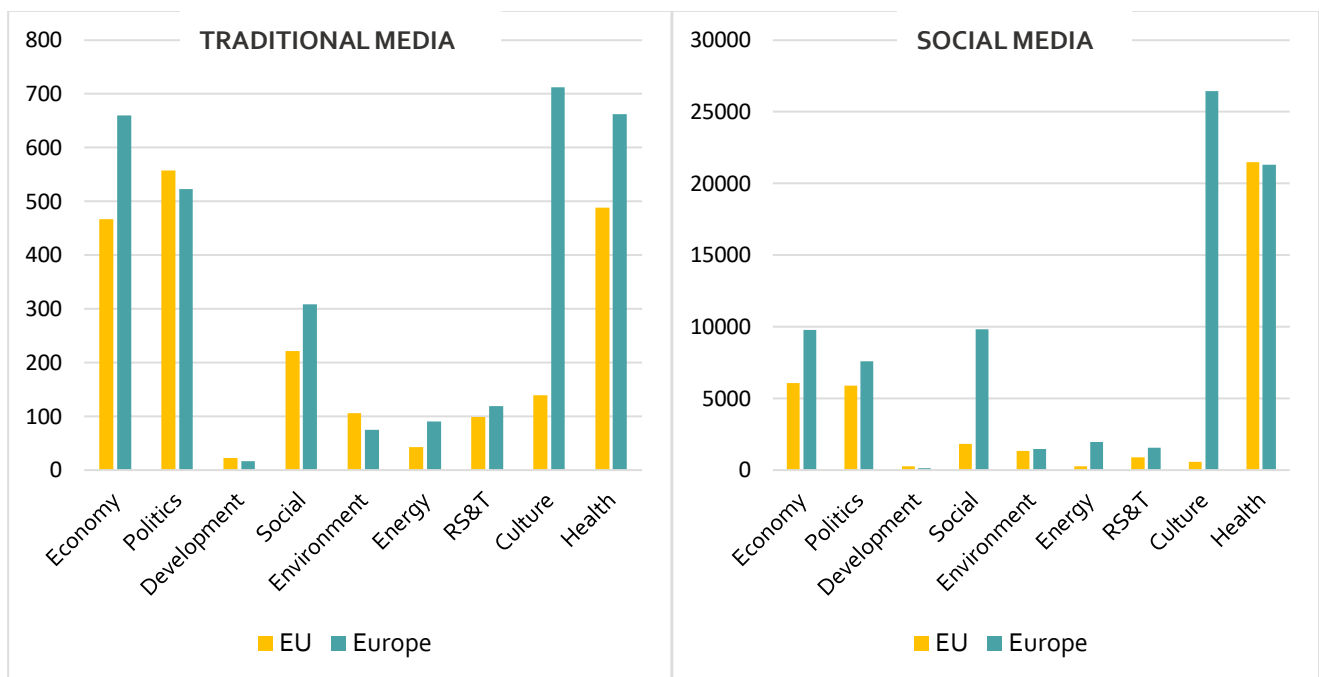
FIGURE 4. EVALUATION OF BRAZIL RELATIONSHIP WITH THE EU AND OTHER COUNTRIES



Note: based on Q3: Which of the following words best describes your country's overall relationship with each of the following countries and organisations? (n=1150)

In the observed Brazilian *traditional media* (press) the EU is most often mentioned in the context of politics (23%), health (23%) and economy (22%). Reports on the social theme has around 10% of coverage. The distribution of news by themes is rather similar in the sample that focuses on the news with the EU in major focus. With regards to politics inside the EU, the topics with greater visibility are former ECB President Mario Draghi becoming Italy's Prime Minister; European Commission concerns on democratic backsliding in Poland and Hungary (freedom of press); and the mistreatment of the Commission President Ursula von der Leyen during an official visit to Turkey. News about EU external relations highlight EU sanctions against China on human rights violations in Xinjiang; Iran's refusal to accept an EU invitation to participate in informal talks on the country's nuclear programme; and the EU's support for Ukraine in the context of Russian military deployment to the country's border. On health, COVID-related news dominate press coverage, presenting the EU as a rather ineffective actor, with a focus on vaccine procurement (disputes with the UK and AstraZeneca (AZ) for delays in vaccine supplies); the EMA's approval of Johnson & Johnson, AZ and Janssen vaccines, exclusion of Sputnik from the EU's vaccination strategy; slow vaccine rollout; restrictions on the use of AZ by EU Member States; EU export controls of vaccines manufactured in the bloc; and discussions on a "Digital Green Pass" – travel pass after vaccinations). With regards to economy, most of the news are about market optimism (Draghi becoming Italy's PM; the EU's recovery fund and expectations that, with the vaccine rollout, the EU economy would return to pre-pandemic levels). The ECB monetary policy is also covered, mostly by *Valor Econômico*. Most of the news in the category of the environment and climate are about the EU setting tougher emission reduction targets and resistance by EU Member States to ratify the EU-MERCOSUR agreement. For "Europe", culture (22%), health (21%), economy (21%) and politics (17%) are the most prevalent themes. *Valor Econômico* newspaper in the "Europe" dataset focuses more on economy instead of development compared to other five dailies. In both datasets, the themes of development (1%) and energy (2-3%) are significantly less covered.

FIGURE 5. THEMATIC FOCUS OF SOCIAL MEDIA AND PRESS ARTICLES REPORTING ON EU AND EUROPE. BRAZIL



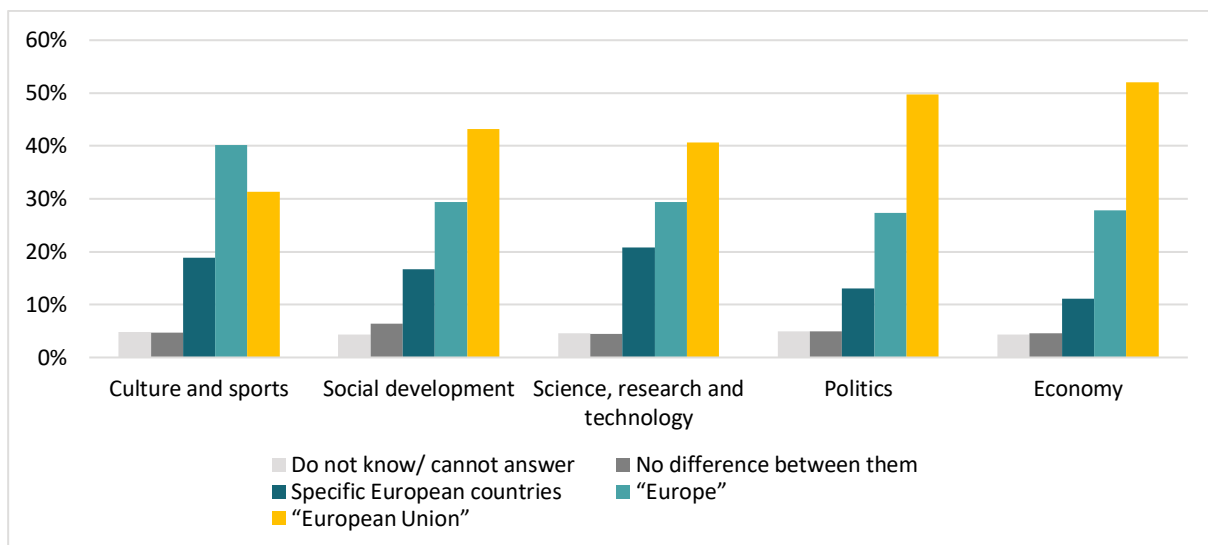
Note: based on automated quantitative data analysis. Includes press articles which report on the EU and Europe as a principal or a secondary subject of the article. One article can reflect more than one theme.

In Brazilian *social media* posts, the EU is most often mentioned with regards to health (55.7%). A considerable share of posts contains economic (15.8%) and political (15.3%) thematic frames. In comparison to the EU, Europe is much more often mentioned in connection to culture (33%) and social issues (12.2%). As for the emotive charge, development, culture and economy are mostly evaluated positively; politics and health mostly negatively; and energy, environment and social issues, neutrally. As for the comparison among Europe and the EU, Brazilian respondents think more about the EU when themes economy (EU 52.1% vs Europe 27,9%), politics (EU 49.7% vs. Europe 27.3%), RST (EU 40.7% vs. Europe 29,4%) and social development are in focus (EU 43.2% vs. Europe 43.2%); they think more about Europe in the case of culture and sports (EU 31.4% vs Europe 40.2%).

As for the youth, most of the students express positive perceptions and expectations of the EU’s leadership in environment and climate change, particularly in Brazil. In this field, some students fear that the end of Merkel’s chancellorship could negatively affect the EU’s environmental leadership. Another student expects that the EU will be a leader in global health, including providing medicine to developing countries, and is frustrated by the EU’s poor handling of the COVID-19 pandemic. Finally, another student expects the EU to be less influential in world affairs due to its internal crisis and the rise of China.

Economy and trade

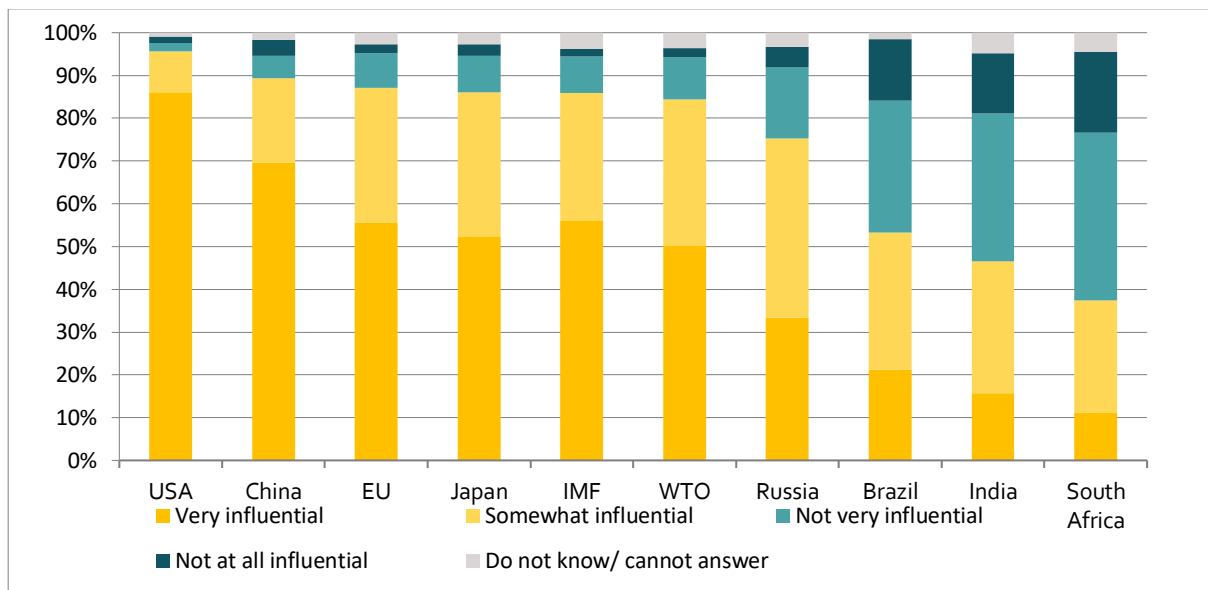
FIGURE 6. ASSOCIATION OF DIFFERENT AREAS TO THE EU VERSUS EUROPE. BRAZIL



Note: based on the answers to Q22: Some people think about Europe, whereas others think about the European Union when talking about economy, politics, culture, sports and other areas. In your case, which term – Europe or the European Union - comes to your mind first when you think about the following subjects? (n=1150)

**Please note that in 2015, this question was accompanied by a chart in a different format under the section “Research, science and technology”. The wording and answer categories used in this question have changed in 2021, making it inappropriate to conduct historical comparisons.*

The EU is perceived as very influential in global economic affairs by 55.5% of the survey respondents, but behind the US (86.1%), China (69.6%) and the IMF (56%). In 2015, 49.5% of survey respondents perceived the EU as very influential and ranked it third along with China. Now, China has surpassed the EU. Regarding the economic relations with the EU, 82.1 % of the respondents agree with the statement that the EU should have stronger economic ties with Brazil (50.2% strongly agree, 31.9% agree, 3.4% disagree, 0.4% strongly disagree and 1.9% do not know/cannot answer) – an increase from 2015, when 68.2% of the Brazilian public supported stronger economic ties. In 2021, 75.5% of respondents perceive the EU as an important trade partner (39.8% strongly agree, and 35.5% agree), and 66.4% as an important foreign investor (29% strongly agree and 37.4% agree). In 2015, numbers were lower, at 58% and 55%, respectively.

FIGURE 7. EU INFLUENCE IN GLOBAL ECONOMIC AFFAIRS COMPARED WITH COUNTRIES AND INTERNATIONAL ORGANISATIONS

Note: based on the answers to the survey Q6: In your view, how influential, if at all, in global economic affairs are the following countries and organisations? (n=1150)

In *traditional media* (press), most of the articles that report on EU activity in this field as a major focus are about market optimism (Draghi becoming Italy's PM; the EU recovery fund and expectations that, with the vaccine rollout, the EU economy would return to pre-pandemic levels). The ECB monetary policy is also covered, mostly by *Valor Econômico*. Most of the news items in the qualitative sample are either neutral or positive and the main actors mentioned are the ECB and European Commission.

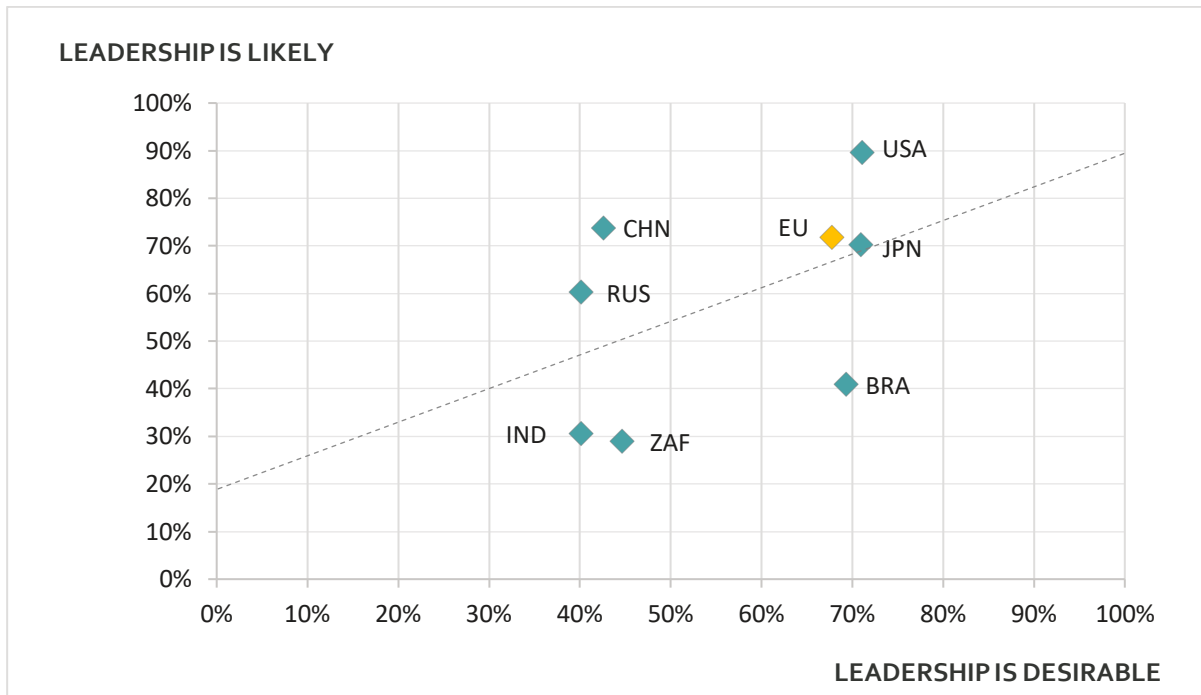
Interviewed experts and youth assess trade and investments as the most important field of bilateral relations, even though some are concerned by the fact that trade side-lines democracy and human rights agenda. One expert from the government states ironically, that EU interests in Brazil are 1st, 2nd and 3rd trade (and in the 4th place environment). The EU–MERCOSUR agreement is seen mostly as important to improve relations with Brazil, but often to the benefit of the EU such as in the case of quotas. One expert criticises that 'the EU-MERCOSUR agreement was bad, it reinforces Brazil as exporter of primary products; the agreement could have opened a different discussion about development, human rights and environment, but it did not'. This contrasts the literature review, in which expectations regarding the conclusion of the EU-MERCOSUR agreement, in 2019, after 20 years of negotiations, are mostly seen as encouraging, casting a positive light on the perceptions of the EU, especially among government officials and businesses, and in the area of biofuels (Gregory & Panzini 2020; Afionis & Stringer 2020). In 2015 the perceptions about the role of the EU-MERCOSUR agreement were also mainly positive.

Politics

In the context of the EU's global role, Brazilian survey respondents see the US as the most likely leader in international affairs (68.2%), followed by China (44.9%) and the EU (38%). In terms of desirability, the EU comes in 3rd as well (36.4%), after the US (46.7%) and Japan (42.3%). China ranks poorly (21.4%). In 2015, the desirability of the EU's global leadership was lower, at 23.2%, and likelihood (very likely) was also lower, at 31.5%. The Brazilian general public sees the US as the most important actor to keep global peace and stability (75.7% of respondents), followed by the UN (72.5%) and then the EU (65.5%). In 2015, the EU was seen as very important by 40.8% and was ranked in 2nd place along with the US,

surpassed only by the UN. Now the EU has been surpassed by the US. Very few survey participants do not know or cannot answer this question (around 2% on average); in 2015 this number was higher, at 7.3%. As for the perception of the EU’s role in political affairs, the EU is seen mostly as performing “very good” in the fight against terrorism and radicalisation (40.7%) and “fairly good” in the support for regional and international cooperation (44.5%), foreign policy (43.4%), justice and the rule of law (37.4%) and media freedom (37.7%). About 3.5% of respondents cannot answer/do not know.

FIGURE 8. DESIRABILITY VS LIKELIHOOD OF EU GLOBAL LEADERSHIP COMPARED TO OTHER ACTORS. BRAZIL



Note: based on Q4: How desirable is that each of the following countries and organisations take a strong leadership role in world affairs? And Q5: how likely or unlikely is it that each of the following countries and organisations will take a strong leadership role in world affairs five years from now? (n=1150) The horizontal axis presents the sum of “Very desirable” and “Somewhat desirable” responses to the Q4. The vertical access presents the sum of “Very likely” and “Rather likely” responses to Q5.

In the *press* that focuses on the EU as a primary topic, politics is the most visible theme, and the main sub-themes are media freedom (concerns of the European Commission about curtails of freedom of the press in Poland and Hungary); foreign policy (EU sanctions against China for human rights violations in Xinjiang; Iran’s refusal to accept an EU invitation for informal talks on the country’s nuclear programme; the EU’s support to Ukraine in the context of Russian military deployment to the country’s border); and fight against climate change/protection of the environment (the EU setting tougher emission reduction targets). Most of the news items are neutral about the EU and the main EU actor mentioned is the European Commission. In the interviews, EU political relations with Brazil rank mostly high (6 experts, 3 youth), or very high (2 experts, 4 youth), 4 experts rank it as average; but international security is practically not mentioned, nor is the EU’s support to regional cooperation. The “double standards” of the EU about human rights – lecturing other countries about human rights norms but disrespecting them within the EU, particularly when it comes to migrants and refugees – are mentioned by many experts and the youth, but one expert notes that the ‘the European Parliament got mobilised about human rights, and police violence [in Brazil]’. In addition, one expert argues that:

‘There is continuity that the EU is seen as a regional actor with soft power, but it is not seen [anymore] as a strategic partner for Brazil’; and another states that: ‘Since 2015 there are no summits of the strategic partnership; and the lack of attention in Brazil to Latin America and the Community of Latin American and Caribbean States - CELAC - also hinders the EU’s influence in the country since the EU acts via CELAC’.

Climate and environment

Public opinion places the EU in the 3rd place and as “very important” when assessing the importance of international actors in fighting climate change and protecting the environment (67.6% of responses), behind the US (77.2%), the UN (72.5%), and Brazil (68.8%). In 2015, 37.7% saw the EU as very important, i.e. a significant increase in 2021. The response share for “do not know” is only 1.7%, pointing to a rather established opinion of the general public on this issue; in 2015 it was 7.7%. 84% of Brazilian respondents evaluate the EU’s role in fighting climate change and protecting the environment as “very positive” and “somewhat positive” (50.9% and 33.1% respectively), placing the EU as the second most positively evaluated international actor in his issue area, behind the UN (57.6% and 28.5%). “Somewhat negative” and “very negative” replies comprise 12.8% of the responses, placing the EU as the second least negatively evaluated international actor in this issue area, also behind the UN (10.6%). The share of “do not know” responses is also low as in the previous question (3.3%).

Most of the *news in the media* that focus on EU actions in the field of environment and climate as a major focus of the reportage are about the EU setting tougher emission reduction targets and resistance by EU Member States to ratify the EU-MERCOSUR agreement given environmental concerns. The main actors in this area are the European Commission and the European Parliament, and most news items on this topic are framed either neutrally or positively, including resistance to ratify the EU-MERCOSUR agreement, which is framed as reasonable given the Bolsonaro Government’s lack of action to curb deforestation.

In the interviews and focus groups, experts rank the relevance of the environment and climate change very high: 10 experts and 6 students rank it at 5 in a scale from 1 to 5, followed by 1 expert ranking it 4, and 1 expert and 1 student ranking it at 3. Most experts stress the importance of the role of the EU in environment/climate change, referencing the EU Green Deal and highlighting the role of the EU as a global norm-setter in this area. One expert suggests a differentiation between EU policies on fighting climate change and those protecting the environment: ‘In the area of climate change the EU is active, but not very visible and not very effective, it has a narrow vision. In the area of the environment, it is a norm-setter at the global level for sure’. Youth in the focus group expresses positive perceptions and expectations of EU leadership in the field of environment and climate change, including exerting diplomatic pressure on other countries (Brazil among them).

Energy

The literature review demonstrates mixed perceptions of the EU in the field of energy, and particularly biofuels, in Brazil. In contrast, traditional media (press) in the observed period rarely have any news about the EU acting as an actor in the energy field. Energy is also ranked surprisingly low in the perceptions of experts and youth in terms of the relevance of this topic for EU-Brazil relations: no expert and only 2 students rank it as very important for EU-Brazil cooperation 5 (on a scale from 1 to 5); 5 experts and 2 students rank it at 4; 4 experts and 3 students rank it at 3; 2 experts and 1 student rank it at 2, and 1 expert ranks it at 1. Interviewed experts address energy less often than the environment or climate change. One expert finds the EU’s energy policy relevant to Brazil; another interviewee refers to the possibility of future dialogues in the energy agenda and the end of nuclear energy. A third expert says that the ‘EU must be more open to the Brazilian plans on biofuels’.

Research, Science and technology

Perceptions of the general public of the EU in the areas of RST are positive, but the EU is seen being behind the US (82.6%), Japan (79.7%) and China (74.9%) as “very important” in advancing innovation and technological progress in the world, with 64.9%. In 2015, only 43.6% perceived the EU as very important, and 9.7% did not know. In the press under observation, RST appears in news articles about scientific discoveries and developments regarding vaccines, being framed neutrally or positively. In 2015, just two articles on RST appeared (about scientific research on the brain and use of digital services by banks in EU Member States).

This area is one of the most positive and effective in the perception of the experts in the interviews, even if the visibility is limited, as summarised by one of them: ‘The population is not aware of these programmes I mentioned, the Brazilian population is not interested in science, so this kind of information does not go to the public. In my areas, the EU is active but not visible for the greater public, but yes, effective, they are all effective’. EU public diplomacy instruments in the area of RST, such as the ERASMUS+, Jean Monnet Activities, and the support to the European Council simulation events organised by the undergraduate students are known and accessed as positive by many experts and the youth. The EU’s role as a norm-setter in RST is also assessed as positive ‘they help our domestic public policies and even regulation and legislation, especially in the digital area’. The experts identify as a problem that Brazil is not eligible for the programme H2020/Horizon Europe, with some exceptions in the area of oceans and research infrastructure and see potential for future EU-Brazil cooperation, deeming particularly relevant for the area of biodiversity.

Development and assistance

When compared to other major countries/institutions in support to developing countries, the EU ranks 3rd most important actor for Brazil’s general public (68.6% of survey respondents) – behind the US (73.9%) and the UN (72.5%). The “do not know” category is low at 2.3%. In 2015, only 36% perceived the EU as very important in this issue-area, and 7.3% did not know. *Traditional media*, however, rarely has any news about the EU acting as a development actor, in Brazil or in any other country.

Experts and youth rank the relevance of EU development initiatives in Brazil as medium to high; most rank it at 3 (5 experts, 3 youth), and 4 (4 experts, 4 youth) on a scale from 1 to 5, followed by 5 (1 expert, 1 youth) and 2 (2 experts). One expert states that the EU should support Brazil to enter the OECD, increase triangular cooperation with Brazil, and become an associated member of the Community of Portuguese Language Countries - CPLP. Another one finds that the EU ‘should work more bottom up in the area of development and embrace the broader society and local level entities. The US is more successful in that, via private foundations, technical support; the EU is too stiff, and therefore not very visible’ (CSO3). One student from the focus group advances that the EU should do much more, including the implementation of reparation policies for colonialism.

Social

The surveyed Brazilian public assesses the EU’s performance in social development mostly high; in fact, higher than in 2015. The total share of “very high” and “fairly good” evaluations is over 60% in 2021 for the level of education (88.5%), overall quality of life in the EU (86.6%), creating employment opportunities (82%), social justice and solidarity (75.4%), climate change and activism (74.2%), gender equality (72%), eradication of poverty (67.9%), reducing income inequality (66.6%), protection of minorities (62.3%). In 2015, the total share of “very high” and “fairly good” evaluations were: level of education (76.6%), overall quality of life (76%), creating employment opportunities (59.6%), social justice and solidarity (65.7%), climate change and activism (73%), gender equality (64.9), eradication of poverty (59.8%), reducing income inequality (58.4%), protection of minorities (51.7%). We can see,

therefore, significant improvements in some indicators, particularly creating employment opportunities, which might have to do with the 2015 context, marked by the Greek debt crisis. Integration of migrants and refugees is ranked the lowest, with 57.6%, as in 2015 (48.3%). This thematic frame is rarely mentioned in the media in 2021 – different from 2015, when social and culture featured prominently due to the migration crisis.

In the interviews, experts attribute a lower place for social matters in EU relations with Brazil: only 1 expert and 1 student rank it 5 in a scale from 1 to 5; 4 experts and 4 students rank it 4; 2 experts and 1 student rank it 3; 4 experts and 1 student rank it 2. One expert states that the EU ‘does not work much on social themes, works a lot in the environment, science, but not much in social themes, diversity’ (CSO3). One student comments on the EU’s ‘diplomatic hypocrisy’: the bloc pressuring other countries to adopt policies on social issues yet unresolved inside the EU, such as LGBTQ+, race and gender issues.

Culture

The public opinion survey reveals that a staggering 89.6% of Brazilian respondents find EU culture and lifestyle “very attractive” and “somewhat attractive”, placing the EU as the most attractive international actor in the eyes of the Brazilian public. But 8.1% of respondents find the EU “not very attractive” or “not at all attractive” and 2.2% answer “Do not know/ cannot answer”. In 2015, 82.8% of the respondents perceived EU culture and lifestyle as “very attractive” and “somewhat attractive”, 13.6% as “not very attractive” or “not at all attractive”, and 3.6% did not know. Monuments and museums and history are the most positively evaluated cultural contributions of the EU (61.1%), closely followed by food and cuisine (59%), luxury goods and clothes (58.4%) and arts (57%). Multiculturalism is the least positively viewed cultural contribution of the EU (44.3%).

This thematic frame is rarely mentioned in the *press media* in 2021, differently to 2015, when social and culture featured prominently due to the migration crisis.

In the interviews and focus group, experts and youth perceive the relevance of culture in EU-Brazil relations as not very relevant: only 2 experts and 2 students rank it at 5 on a scale from 1 to 5; 3 experts and 4 students rank it at 4; 4 experts and 3 students rank it at 3, and 3 experts rank it at 2. However, European culture broadly speaking is positively assessed as are cultural public diplomacy initiatives such as the EU Gastronomic Markets (Feiras), Europe Week, film festivals. Many experts mention the cultural ties with Portugal, Spain, Italy and Germany as ‘the social component’ tying Brazil and the EU and ‘cultural identity is very strong so it is impossible to see a dissociation, independently of the ideological (dis)alignment’; ‘Historical and cultural factors are favourable and fundamental’. The youth mention the importance of Member States’ cultural institutes in Brazil such as the Goethe Institute, Alliance Française, and Instituto Cervantes. Family ties and common values are often mentioned by experts as positive aspects, a “glue” even in a context of decreasing economic relevance.

Health

Public opinion denotes mostly positive views of the EU in the issue area of health: 82.3% of Brazilian report they have “very good” or “fairly good” perceptions of the EU in this issue-area, which contrasts media and interview findings. For example, in traditional media (press), health is the second most visible theme after economy. In the press that focus on the EU as a major actor, COVID-related news dominates, presenting the EU as a rather ineffective actor, with a focus on vaccine procurement (disputes with the UK and AstraZeneca (AZ) for delays in vaccine supplies); EMA approval of Johnson & Johnson, AZ and Janssen vaccines, exclusion of Sputnik from the EU’s vaccination strategy; slow vaccine rollout; restrictions on the use of AZ by EU MSs; EU export controls of vaccines manufactured in the bloc to third countries; and discussions on a “Digital Green Pass” (travel pass after vaccinations). Main actors mentioned were the EMA and the European Commission.

Health governance is perceived by most experts as of low relevance in EU-Brazil relations – an intriguing finding given the context of the COVID-19 pandemic: only 2 experts and 2 students rank it at 5 on a scale from 1 to 5; 4 experts and 2 students rank it at 4; 3 expert and 3 students rank it at 3; 3 expert rank it at 2, and 2 experts rank it at 1. During the interviews, health is only mentioned when referring to the COVID-19 pandemic, and in most cases the EU is perceived negatively; disappointment is recurrent: ‘the EU should have been more active in the COVID-19 pandemic [helping the developing world] – not only supporting intellectual property rights of European corporations’; ‘the EU should have done more to help the outside world in the COVID -19. If there is a strategic partnership, Brazil should have received attention. The US changed from Trump to Biden, not the EU’; ‘The COVID crisis was negative: European states focused only on their own population, and did not approve vaccines from Russia and China, which will hinder tourism’. One expert notes the role of the EU as a norm-setter in this area: ‘The EU is a norm-setter, we must admit, there is now a pressure for vaccination campaigns due to travel bans’. Youth are also frustrated by EU’s poor handling of the COVID-19 pandemic. One student has expectations that the EU would have leadership on global health, including providing medicines to developing countries.

Continuity and change behind actorness

The Brazilian general public continues to see the EU as an important and trustworthy partner for Brazil in international relations, second only to the US and Japan. Furthermore, Brazil’s general public in 2021 continues to see the leadership of the EU in world affairs as desirable (ranking 3rd, behind the US and Japan). However, China has now surpassed the EU in terms of the likelihood of international leadership in the future (in 2015, the EU ranked 2nd, behind only the US; in 2021, it is in the 3rd position, behind China and the US). In 2021, more respondents think that the EU *should* have stronger political ties with Brazil, but less respondents think that the EU actually *is* an important partner to Brazil in international relations when compared to 2015. Similarly, in 2021, the EU is considered relatively less influential in global economic affairs and in global peace and stability than in 2015 in the eyes of the Brazilian public, experts and youth. In 2021, respondents rank the EU 4th in terms of influence in the global economic affairs, behind the US, China and the IMF, whereas in 2015, the EU and China were ranked similarly in 3rd place. In 2015, Brazilian public opinion on the EU’s performance in global peace and stability ranked the US and the EU similarly highly, surpassed only by the UN. In the 2021 survey, the US is seen as the most important actor to keep global peace and stability, followed by the UN and the EU in 3rd place.

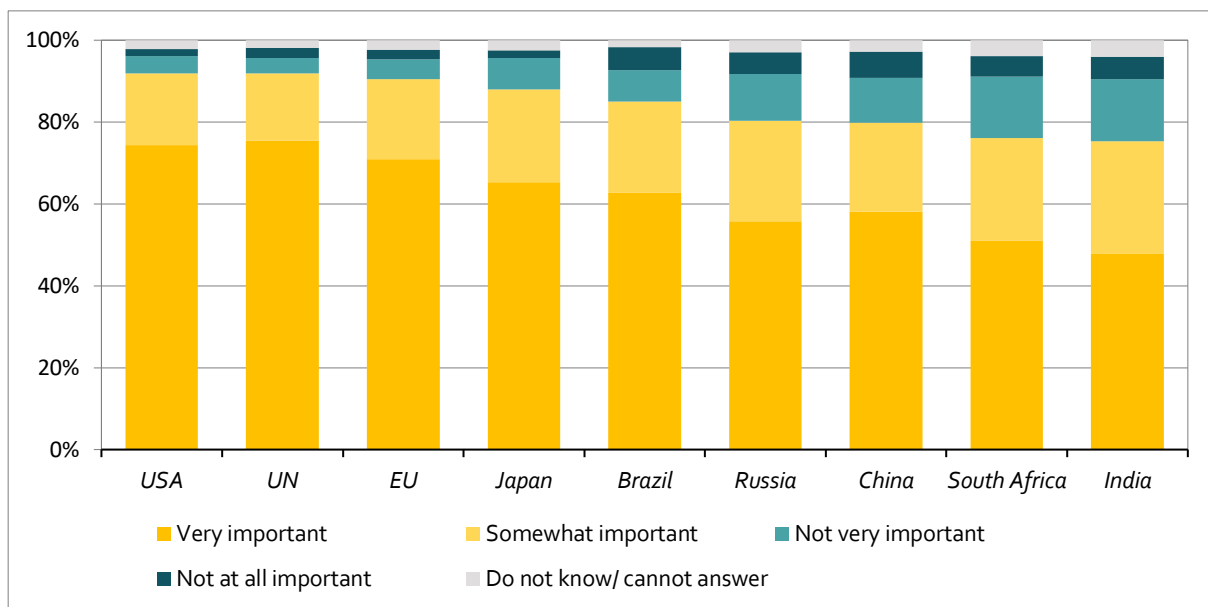
As in 2015, the general public, experts and youth agree that the EU is an important trade partner for Brazil, although some experts are critical of the EU’s emphasis on trade relations with Brazil to the detriment of democracy and human rights agendas, considered very important in the current context of Bolsonaro’s government. The EU’s performance across social development indicators such as quality of life and level of education, EU culture and lifestyle, and the EU’s role in fighting global climate change and protecting the environment all continue to add to its positive perceptions among the general public, youth and experts, whereas the integration of migrants and refugees as well as protection of minorities are still more negatively evaluated. Noteworthy, the prominence of these themes in traditional media has significantly decreased when compared to 2015. The EU’s actorness on energy remains low, except for biofuels, which appeared prominently in the literature review. In the field of research, science and technology, experts consider this an area of utmost importance to EU-Brazil relations, but population at large does not know the initiatives, and survey respondents still see the EU as lagging Japan, the US and China.

1.1.4. The EU as a norm-setter

More than 90% of general public perceive the EU, as well the UN and the US, as having a very or somewhat important role in promoting and defending human rights worldwide – the EU coming in 3rd

place behind the US and the UN. Russia, China, South Africa and India score slightly below 80%. In 2015, less respondents (74.9%) perceived that EU as having a very or somewhat important role in promoting and defending human rights worldwide.

FIGURE 9. PERCEPTION OF THE IMPORTANCE OF EU, OTHER ORGANISATIONS AND COUNTRIES IN GLOBAL HUMAN RIGHTS PROMOTION. BRAZIL



Note: based on Q11: In your view, how important, if at all, a role do each of the following countries or organisations play in promoting and defending human rights worldwide to protect human dignity, freedom, equality and solidarity? (n=1150)

The EU's image in the area of democratic values is positive in Brazil. The survey indicates a high level of perceptions of similarity of individual values between Brazil and the EU – above 40% for the values of liberty (45.2%), respect for human rights (42.8%) respect for human dignity (42.4%) and democracy (40.9%), with about 10% of perceptions of not very similar values for these items. About 5% of respondents reply that they do not know or cannot not answer this question, which also covers other items such as rule of law, tolerance, justice and solidarity. However, in the question about the perception of convergence of values and norms between Brazil and the EU, only 19.8% of respondents strongly agree with the statement that the EU shares the same democratic principles of Brazil, 26% agree, 29.4% neither agree nor disagree, 15% disagree, 4.3% strongly disagree and 4.8% do not know. This difference might be explained by an assessment of decreasing democratic records in Brazil during Bolsonaro's Government. As for the statement that the EU is a good example for Brazil in promoting gender equality, 32.2% strongly agree, 33.1% agree, 22.9% neither agree nor disagree, 6.4% disagree, 1.4% strongly disagree and 4% do not know.

In the *media (press)*, in the articles that dedicate the EU major focus, the EU is framed as normative power tackling democratic backsliding in Poland and Hungary' EU sanctions for human rights violations against China are also referenced. In articles about EU sanctions on China, there are brief mentions of EU sanctions against Myanmar. This is the opposite of media framing in 2015, when the EU was mentioned in the context of its disrespect of human rights standards during the handling of the migration crisis.

In the interviews, experts appear to see the EU as a norm-setter in several areas (human rights and democracy, trade regulation, environment and climate change, digital technology, and education) –

associated with concepts such as development, progress and a welfare state. As one expert summarises: ‘Europe is the regulation agency of the world; it advances a lot, and if their regulations do not become the international standards, they set the terms of the global discussions, e.g. The Green Deal. Our corporations must follow that’. However, others note that despite being a norm-setter, the EU does not necessarily follow its own norms: ‘the EU is clearly a norm-setter depending on the area, for instance, human rights, labours issues, environment, even if sometimes these norms are not respected, or only partially respected’, or ‘privileges its economic/trade interests to the detriment of human rights norms at the societal level, too much economics and less human rights’, which is considered regrettable in the current context of Bolsonaro’s government.

Similarly, the EU is considered by many students as a norm-setter of democratic, social, and environmental standards, being favourably compared to the US. The EU is also equated by youth with development, good quality of life, cultural and intellectual richness, strong institutions, and diversity. However, inconsistencies are also noted. One student accuses the EU of ‘diplomatic hypocrisy’, the bloc pressuring other countries to adopt policies on social issues yet unresolved inside the EU, such as LGBTQ+, race, and gender inequalities. Another student perceives the EU as promoting ‘pink and purple nationalisms’, presenting itself as ‘being perfect’, a champion of minority rights, while at the same time promoting restrictive migration policies and turning a blind eye to democracy and human rights violations inside the bloc, mentioning democratic backsliding, the surge and popularity of the far-right, human rights violations in Hungary and Poland.

Continuity and change behind the perception of EU as a norm-setter

In terms of continuity, public opinion in Brazil acknowledges, as in 2015, the EU’s performance in the field of promotion and defence of human rights worldwide, ranking it in 3rd after the US and the UN, although, in 2015, the EU was ranked 2nd – now surpassed by the US. Perceptions of the EU as hypocritical or as lecturing other countries on issues yet unresolved inside the bloc have also remained in place, and mostly among youth.

In terms of changes, in 2015, youth and expert interviews expressed the perception of the EU as an arrogant actor, with a ‘hearing problem’, establishing a vertical, top-down, one-way relationship with Brazil, pressuring other countries to adopt its norms and values, deemed superior. In contrast, in 2021, both the youth focus group and expert interviews reveal a wish for more EU pressure on the Brazilian government, particularly concerning deforestation, undemocratic practices and human rights violations. This change in perception, from the view of an ‘arrogant EU’, which imposes its norms and values, to a wish for more EU pressure on Brazil, particularly regarding democracy, human rights, and environmental norms, can be attributed to the *location-specific* factors such as democratic backsliding and environmental destruction in Brazil following Bolsonaro’s election.

1.1.5. Continuity and change

Traditional media analysis in 2015 and 2021 reveal that the EU is rarely ever portrayed as acting in Brazil or with Brazilian actors. Most of the news are about internal EU and EU Member States’ affairs or about EU relations with third countries. When a “local hook” is present, it is usually the EU-MERCOSUR Agreement (in 2015, expectations that the Agreement would be concluded; in 2021, delays in the Agreement’s ratification). However, in 2015, the press coverage of the EU was more emotively charged, particularly in the context of the Greek debt crisis and the migration crisis. In both these instances, the EU was portrayed as acting too harshly. In contrast, most negative evaluations of the EU in traditional Brazilian media in 2021 are in the context of the EU’s handling of the COVID-19 pandemic. Instead of an actor that acts too harshly, the EU is portrayed in this context as a rather inefficient actor. Perceptions of “weakened” EU actorness are also manifested by the Brazilian public, expert interviews, and youth focus group. Brazil public sees China as having surpassed the EU in terms of potential global leadership

in the future but considers the EU to be less influential in global economic affairs and in global peace and stability in 2021 than it was seen in 2015.

As in 2015, youth and experts continue to perceive the EU as a norm-setter, associated with concepts such as democracy, human rights, development, social and environmental protection, good quality of life, high level of education, intellectual and cultural richness, with which Brazil shares values and cultural heritage. The EU's role in fighting global climate change and protecting the environment continues to be positively evaluated by the general public, youth and experts. Perceptions of the EU as hypocritical, lecturing other countries on issues yet unresolved inside the bloc, and as bureaucratic and protectionist, have also endured. In terms of changes, in 2015, youth and expert interviews expressed the perception of the EU as arrogant, with a "hearing problem", establishing a vertical, top-down, one-way relationship with Brazil, pressuring other countries to adopt its norms and values, deemed superior. In contrast, in the Update Study 2021, both the focus group and interviews participants reveal a wish for *more* EU pressure on the Brazilian government, particularly concerning deforestation, undemocratic practices and human rights violations.

Brazilian perceptions seem to be a result of interactions between internal (*location-specific*) and external (*EU-specific* and *global*) factors, which can be summarised as the rise of China, the "decline" of Brazil since the election of Bolsonaro, EU crises (economic, rise of the far-right, inefficiency in the handling of the COVID-19 pandemic), and enduring positive images of the EU in social welfare, particularly education, culture and environment. When it comes to *location-specific* factors, in 2015, Brazilian EU perceptions stemmed from the emerging self-visions of Brazil as a confident "rising" power that saw itself as a norm-sender and norm-shaper, and was, therefore, demanding more equal relations with the EU to be "heard". In 2021, in contrast, Brazil is framed by the press, focus group and interviews as less relevant and more isolated on the world stage because of actions by Bolsonaro's government. Youth in particular welcomes the EU's pressure on the government in particular issue areas, such as the environment, democracy and human rights, in which the current Brazilian administration fails rather poorly, and the EU should exert leadership. *EU-specific* factors that contribute to more negative perceptions of the EU, particularly among the youth, include Brexit, Eurozone and migration crises, democratic backsliding and human rights violations in Hungary and Poland, the surge and popularity of the far-right, and the EU's handling of the COVID-19 pandemic. All these have affected the EU's credibility and the image of the EU as a model. However, historical and cultural ties with Member States (particularly Portugal, Italy, Germany and Spain) are still considered very strong and the EU continues to be positively viewed by the general public, youth and experts in the areas of internal social development indicators, culture and lifestyle and fighting global climate change and protecting the environment. Finally, with regards to global factors, the rise of China has come up in the public opinion survey and youth focus group as a challenge to the EU's leadership in world affairs.

1.1.6. Recommendations for EU public diplomacy

Based on the information from the survey, media analysis, interviews, and literature review, we recommend the EU to prioritise three themes in its public diplomacy strategy to Brazil in the short and medium to long term: *Environment/Climate Change; Democracy/Human Rights; and Research, Science and Technology*, detailed below.

Additionally, for the long term, we recommend the EU to keep its *cultural public diplomacy activities* as these are highly appreciated by the general public and particularly youth, bearing the highest positive evaluation among all themes in the context of historical and cultural ties between Brazil and Europe (see Public Opinion and Focus Group report).

The demographic structure in Brazil has been changing significantly in the last decades; according to the UN World Population Prospects 2019 in 1950 the population was 54 million, with an age average of

around 19 years; in 2020, the population reached 212 million, and the age average is about 33 years. Despite a low level of formal education and high inequality (according to the OECD half of students in Brazil did not achieve minimum proficiency -PISA Level 2- in reading in 2018, while only 1.4% were high achievers -Level 5 or above-, compared to OECD averages of 23% and 8.8%), Brazil is the country in the Western Hemisphere with the most time spent on social media per day (according to Statista internet user penetration is ca 68%, and 9 out of 10 users access web on a daily basis).

Activities such as film festivals and food fairs can take place both at the capitals and interior towns, especially in regions other than the Southeast and South, where European culture is present due to Italian and German migration flows. We recommend greater engagement and collaboration with EU Member States' cultural institutes, mentioned by youth (see Focus Group report) such as the Goethe Institute, Alliance Française, and Instituto Cervantes, which can constitute channels to increase EU visibility in Brazil.

For the short term, in the context of Bolsonaro's government, we recommend that EU public diplomacy prioritises dialogues with local level government (governors, mayors). In particular, given the emergency context of the COVID-19 pandemic, we recommend engagement with sub-national governmental actors working on the COVID-19 response. Experts mention, for example, the *Northeast Consortium*, and *Legal Amazon Consortium*, as well as the national institutes under the Ministry of Health, that produce COVID-19 vaccines (*Fiocruz* and *Instituto Butatã*). In light of the Brazilian government, engagement related to the EU-MERCOSUR agreement is currently not a priority, although it is a key issue for the consolidation of bilateral relations in the long term, as pointed out by many experts' interviews and in the traditional media (see Expert Interviews and Traditional Media reports).

Finally, we recommend the use of social media, particularly Twitter and Instagram, to engage younger audiences. More "traditional" channels, such as conferences, events and expert dialogues should be prioritised for engagement with civil society, academia, business, and sub-national governmental actors.

Theme: Environment/Climate Change

This is an issue-area in which the EU is already positively evaluated by the population, as evidenced by public opinion poll, media analysis, focus group and interviews, and has become more important since 2015, and especially in the context of the unwillingness of the current Brazilian government to curb deforestation and set tougher emission reduction targets. Youth, in particular, expect EU leadership in this issue area.

Policy aims

- Increase visibility of EU's global leadership role in the environment and climate change policies and initiatives.
- Promote norms of corporate environmental responsibility among businesses.

Medium- to long-term steps

- Exchange best practices and promote transnational collaboration and knowledge-sharing on Environment and Climate Change;
- Implement new formats of collaboration among civil society, businesses and sub-national partners on climate and environmental innovation

Short-term practice-oriented suggestions

- Facilitate partnerships of research and development cooperation projects with civil society organisations and universities on environmental projects, including forest and biodiversity conservation, and the development and implementation of green technology;
- Support the existing or suspended sector dialogues on climate change and environment, especially on biofuels and biodiversity, seen as particularly important by experts interviewed;
- Publicising via social media, particularly Instagram and Twitter, and radio (to achieve broader population) of EU environment/climate change policies and initiatives, and how they impact and relate to Brazil;
- Exchanges with stakeholders such as expert dialogues under Chatham House rule; conferences broadcasted via Youtube/Twitter/Facebook/Instagram;
- Support to EU Council Simulations (done by students from university and high school), prizes (for journalists publishing on Environment/Climate Change and students' dissertations on the topics);
- Offer short-term secondments to the EU Delegation from civil society or business stakeholders to implement climate and environmental projects;
- Offer journalist exchange platforms on how to report on climate change and environment;
- Offer capacity courses to federal and state-level business associations;
- Publicise ERASMUS+ funding calls and support the eligibility of Brazilian institutions to Europa Horizon calls in the areas of environment and climate change, especially biodiversity (area emphasised as particularly urgent by experts).

Whom to involve from key audiences

EU and Canadian diplomatic communities; EEAS; Global Affairs Canada; Academia (including students), think tanks (ex.CEBRI), NGOs (ex. Instituto Socio-Ambiental, Instituto Clima e Sociedade), government institutes (ex. IBAMA, ICMBio), members of the national Congress (focus on the participants of the Inter-parliamentary dialogues), local level/cities members of legislative and executive; Jean Monnet Chairs (USP; FGV-Rio; PUC-Rio, UFMG, UFGD, UFSC, UFRGS, UFC, FECAP); Federal and state-level business associations CNI, FIESP, FIRJAM.

Theme: Research, Science and Technology

This area is one of the most positively evaluated by the experts and youth, but the visibility by the general public is very limited. The EU public diplomacy instruments in the area of RST, such as the ERASMUS+, Jean Monnet Activities, and the support to the European Council simulation events organised by the undergraduate students are known and accessed as positive in the Interviews and Focus Group. The EU's role as a norm-setter in RST is also assessed as positive and experts value EU-Brazil cooperation in RST.

Policy aims

- Support dialogue between EU RST stakeholders in science communication and their Brazilian peers;
- Increase research capacity and transnational collaborations in RST;

Medium- to long-term steps

- Support the eligibility of Brazilian institutions to Europa Horizon calls and the existing or suspended Sector Dialogues, which are highly valued by experts.

Short-term practice-oriented suggestions

- Offer tutorials and technical support to the preparation of proposals and management of projects;
- Publicise existing public diplomacy initiatives in RST such as Erasmus+ and Jean Monnet activities;
- Publicising via social media channels, particularly Instagram and Twitter, and radio (to reach broader population)
- Host events with academic stakeholders of EU RST initiatives on Brazil;
- Exchanges with stakeholders such as expert dialogues under the Chatham House rule and conferences broadcasted via Youtube/Twitter/Facebook/Instagram focusing on the social impact of research;
- EU Council Simulations (students), prizes (students' dissertations).

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).

Theme: Democracy and Human Rights

The EU's image in democratic values is positive in Brazil according to the Survey and experts see the EU as a norm-setter in democracy and human rights. Youth, although critical of what is perceived as EU "hypocrisy" in democracy and human rights (i.e., turning a blind eye to democracy and human rights violations inside the bloc), welcome the EU's pressure on the Brazilian government concerning these issue areas given the current context of democratic backsliding and human rights violations in Brazil. Experts lament that trade side-lines the democracy and human rights agenda in EU-Brazil relations and wish the EU to help improve the political situation in the country.

Policy aims

- Empower local level government (legislative and executive) to promote a more bottom-up profile, particularly relevant under the current government of Bolsonaro, capitalising on Brazil's federal structure and the competences and interests of regional and local actors;
- Strengthen civil society;
- Strengthen freedom of speech.

Medium- to long-term steps

- Improve the channels of dialogue with local level government;
- Implement new and cross-sectoral formats for civil society engagement in the cities and regions.

Short-term practice-oriented suggestions

- Offer training courses for journalists for media investigation, assisting with publicising of the results of their work;
- Support financially independent, non-commercial journalism agencies;

- Support the existing or suspended sector dialogues, which are highly valued by experts;
- Publicise European Instrument for Democracy and Human Rights funding calls and facilitate partnerships with civil society organizations engaged with human rights, including social and economic rights;
- Promote exchanges with stakeholders such as expert dialogues under Chatham House rule, and conferences broadcasted via Youtube/Twitter/Facebook/Instagram organized in partnership with the organizations mentioned below.

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.

1.2. Canada

This Country Chapter presents a synthesis of the Canada-specific findings based on traditional and social media analyses, interviews with multipliers and influencers, focus groups with university students and a public opinion poll – all conducted in the framework of the Update Study 2021. The structure of the chapter follows the logic of the research design. We present the main findings for Canada according to the research indicators guiding the 2021 Study: visibility, actorness, local resonance; and norm-setting. We also discuss findings according to the themes analysed in this study: economy and trade; political issues; development; social issues; environment; energy; science, research and technology; culture; education and health. The penultimate section looks at the drivers behind perceptions of the EU and Europe in Canada. We conclude the chapter with recommendations for the EU's public diplomacy in Canada.

Summary

Overall, the EU in Canada is perceived as an actor of high significance. Its influence is considered positive, as it was already the case in 2015. The areas where 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 on the perceptions of the EU. Multilateralism and the defence of the rules-based international order have become more prominent topics since 2015. The aspects of the EU's image most visible according to the public opinion survey also relate to the economy and various elements that point to a shared Canada-EU identity (multilateralism, democracy, minority rights and cultural affinity). The traditional media (leading press) and social media also focus largely on the EU in the context of economic affairs, and also on health, specifically because of the COVID-19 pandemic. Interviews and focus groups put a greater emphasis on the EU's actions in 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 used to be in the original study.

1.2.1. Sample

The online survey was coordinated and conducted by PPMI through an online panel provided by Syno International. The respondents in Canada were surveyed in English and French. The data collection took place from 28 April to 16 May 2021. The sampling was designed to be nationally representative of

age, gender and regions. Respondent profiles in Canada were established based on the data from Statistics Canada⁵. The survey includes 1,018 individuals between 15 and 64 years old⁶.

Media

PPMI carried out the quantitative aspect of media analysis collecting a sample of five popular prestigious dailies *The Globe and Mail*; *Calgary Herald*; *The Toronto Star*; *Le journal de Montréal*; *Vancouver Sun* and one business newspaper *The National Post* – monitored from 1 February to 30 April 2021. The *Factiva* repository was used to aggregate content from both licensed and free sources, and in-house data processing was applied to produce the results. We collected two separate datasets in English and French over the observation period – one focusing on the “EU” as a search term (1,141 articles) and another one – on “Europe” (2,721 articles). Search terms for the dataset “EU” are: “European Union”, “EU”, “European Commission”, “European Parliament”, “Court of Justice of the European Union”, “EU presidency”, “EU Council”, “European Council”, “Council of the European Union”, “Eurozone”, “European Central Bank”, “European Investment Bank”, “European Medicines Agency”. The search terms for the dataset “Europe” are “Europe”, “European” and “Europeans”. The search terms for “EU” and “Europe” datasets consider both plural and singular forms as well as possible grammatical forms of the search terms in the local language. Europe dataset excludes articles containing any of the “EU” dataset keywords.

The qualitative media content analysis of news that reported the EU as a major focus/theme (69 articles) was designed, supervised and coordinated by experts from Public Diplomacy and Political Communication Forum (PD-PCF), University of Canterbury (UC), New Zealand, and conducted by country experts trained by the PD-PCF UC. PPMI collected the media sample for the in-depth qualitative content analysis using the search engine from two popular dailies *The Globe and Mail* and *Calgary Herald* and one business newspaper *The National Post*. The timeframe of observation remained the same as for the quantitative and social media analyses. Country experts analysed the EU image created by applying elements of content, cognitive and critical discourse analyses.

Social media

PPMI carried out the social media analysis. The data collection process was automated using the online social media monitoring tool *Mediatoolkit*. Social media posts were collected from Twitter, Facebook and Instagram with the use of automated queries. Coverage of the EU was traced using a set of the EU-related keywords: “European Union”, “EU”, “European Commission”, “European Parliament”, “Court of Justice of the European Union”, “CJEU”, “EU presidency”, “EU Council”, “Council of the European Union”, “European Council”, “Eurozone”, “European Central Bank”, “European Investment Bank”, “European Medicines Agency”. All the keywords were additionally traced in one-word format to capture related hashtags: `europeanunion`, `europeancomission`, `europeanparliament`, `courtsofjusticeoftheeuropeanunion`, `eupresidency`, `eucouncil`, `europeancouncil`, `counciloftheeuropeanunion`, `europeancentralbank`, `europeaninvestmentbank`, `europeanmedicinesagency`. Europe-specific keywords used for filtering relevant social media posts are “Europe” and “European”. Europe dataset excludes posts containing any of the “EU” dataset keywords. Additionally, a location filter was used to ensure that the collected mentions originate from Canada. A language filter was set up to collect posts in English and French. The resulting sample of Canadian social media posts collected from 1 February to 30 April 2021 includes 69,906 mentions, of which 27,758 are mentions of the EU (98% in English) and 42,148 of Europe (96% in English).

⁵ Statistics Canada: <https://www.statcan.gc.ca/eng/start>

⁶ Detailed public opinion survey data are available in Annex II of this Report – Comparative public opinion survey report.

Working with social media platforms, the Project Team followed each platform's terms of use. All identifiable information of individuals from social media data remains confidential and is removed before publication of findings. Computational analyses of the large number samples involve only contents from media databases' public websites and non-private social media accounts – that is, posts that are available to public audiences. No generalised conclusions that might cause any potential harm will be drawn from social media analyses on identifiable communities.

Interviews and focus groups

Interviews with local opinion- and decision-makers as well as focus groups with students were conducted by the Country Experts, with training support and supervision from PD-PCF UC, following the approval of the UC Human Ethics Committee. As part of this study, interviews and focus groups aim to provide in-depth explanations about Canadian perceptions of Europe and the EU and cross-reference the findings from the public opinion survey, traditional and social media analyses.

The focus group session took place on 15 April 2021, online. It gathered seven undergraduate social science university students from across Canada (three female and four male students) and lasted 84 minutes. Most students studied political science/international relations, in addition to minors in history or economics. Half the participants were already knowledgeable about Europe/the EU thanks to introductory classes on the topic and/or prior school trips to Europe. 13 interviews were undertaken virtually with multipliers/influencers working in government, business, civil society, academia and the media (six female, seven male experts). Interviews used a semi-structured questionnaire identical for all countries, and they lasted from 26 to 54 minutes. Half the interviewees interacted with the EU/EU policies at some point in their career; the other half was involved in international affairs more broadly. Semi-structured, anonymous qualitative group interviews under Chatham House Rules were conducted with all EU Delegations across the 13 key partner countries. Interviews lasted between 60 to 90 minutes. The group interview with representatives of the EU Delegation to Canada was conducted in April 2021 by members of the Core Team (PD-PCF UC and PPMI) and the Country Expert.

1.2.2. Visibility

Back in 2015, 15% of the surveyed Canadians did not know or would not answer the question whether they felt positively or negatively about the EU. This finding may demonstrate higher level of indifference towards the EU in the past. The share of respondents who would not answer or did not know was higher than that of all other countries in the analysis. In 2021, only 6.3% of respondents would not know what to answer or would not answer this question. More respondents chose to comment about their attitudes towards the EU than towards some countries like India, Brazil or South Africa.

In 2021, 32% of the survey respondents associate the EU with the word *modern*, 29.6% with the word *united*, 29.2% with *multicultural*, 26.8% with *peaceful*, and 24.2% with *strong*. It appears to be seen as more multicultural, and also more united, than any other country in the analysis. However, the EU is not seen as strong as the US (36%), China (29.9%), Russia (35.1%) or Japan (30%). The US and Japan also appear to be more modern (36.4% and 47.8% respectively), while Japan is the only country that appears to be more peaceful than the EU according to the respondents (36.4%). The EU scores very low – and below all other countries – on negative descriptors such as hypocritical (6.2% of respondents say it is), aggressive (3.8%) or arrogant (6.3%). In comparison to 2015 the EU has improved, and it is seen as more modern in 2021 (in 2015, 28.4% chose 'modern' as a descriptor), more united (24.8% described the EU as united in 2015), more peaceful (20.0% selected descriptor "peaceful" in 2015) and stronger (21.4% in 2015), while the EU is seen as less multicultural in 2021 (34.3% in 2015). The EU has also improved on the negative indicators in comparison to 2015, when 5.7% saw it as aggressive, 8.1% as hypocritical, and 8.5% as arrogant.

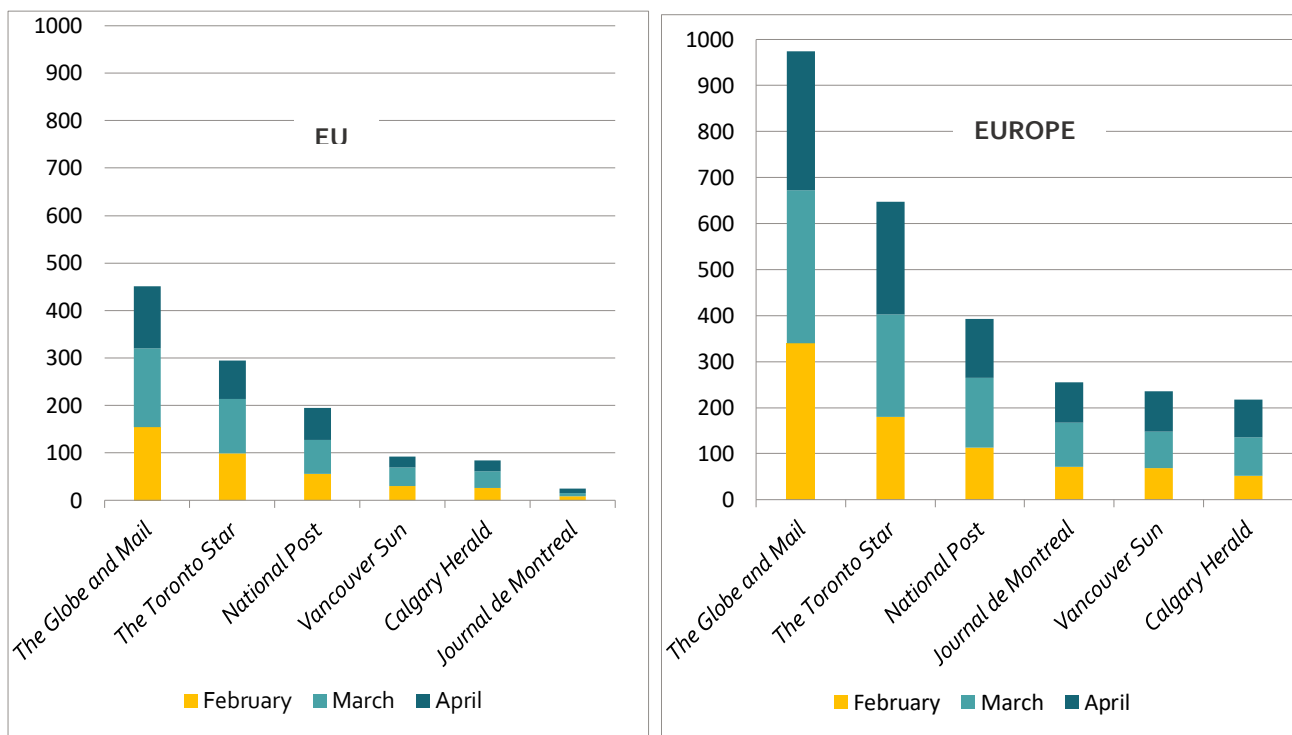
The policy areas in which the EU is seen as performing particularly well are, in decreasing order, tourism (34.6% of respondents believe its performance is “very good”), global trade (25.4%), industrial development, medical research, global health, science and research. At the other end, agriculture, entertainment industry, media and publishing, and space exploration and technologies are assessed slightly less positively. On average, 15-20% of the respondents chose not to answer this question, which may demonstrate a limited awareness of many EU policies among Canadian public. Yet at the same time, 41.7% of the survey respondents have indicated that they hear or read about the EU at least once a week, as opposed to 33.8% who rarely or never do.

According to the 2021 public opinion survey, the print media comes sixth as a source of information about the EU or Europe for Canadians (16.2% of respondents use print media to learn about the EU). Online media and TV channels come first and second by far (half of the respondents), followed by the social media, entertainment streaming platforms and the radio (radio is on an equal footing with the print media).

Overall, *press coverage* of Europe is significantly higher throughout the whole observation period than the coverage of the EU and its institutions (70% of the total traditional media sample referenced “Europe” vs. 30% of the final sample referencing the EU). In both datasets, *The Globe and Mail* and *The Toronto Star* show much higher coverage of the EU/Europe than the other four newspapers. *The Globe and Mail* was already a leader in the volume of EU coverage in 2015, while *The Toronto Star* had not been analysed.

The *degree of centrality* in the representation of the EU and its institutions is relatively low for all observed newspapers. The share of articles which assigned the EU with major degree of centrality ranges between 11.3% (*The Globe and Mail*) and 16.9% (*National Post*). On average, this share is slightly lower than in 2015 (18 to 19%, depending on media outlets in 2015). Among articles that reported the EU, its institutions and policies with a major focus, there are 31 articles published by *The Globe and Mail*, 28 by the *National Post*, and 10 by the *Calgary Herald*.

FIGURE 10. VOLUME OF NEWS ITEMS WITH A REFERENCE TO THE EU AND EUROPE IN TRADITIONAL MEDIA. CANADA



Note: based on automated quantitative data analysis. Includes press articles which report on the EU and Europe as a principal or secondary subject of the article.

The *National Post* prefers to place EU news evenly in the “world section” (when it comes to the COVID-related news) and in the “business section” (or the “Financial Post”) for most other news. In *The Globe and Mail*, most EU articles appear in the middle of the large “news” section (pages 5-7) or in the business sections (TGM’s “Report on Business”). The frequent placement of EU news in both the *National Post*’s “Financial Post” and *The Globe and Mail*’s “Report on Business” is a reflection of the media’s traditional habit of treating the EU primarily as a trade and economic issue. Finally, the *Calgary Herald* reproduces content from the *National Post* in its “world” pages. There is a greater proportion of long, detailed articles in *The Globe and Mail* in 2021 in comparison to 2015, which shows an ongoing commitment from the newspaper to report on the EU’s main policy developments, and no major difference in the *National Post* (the *Calgary Herald* was not included in the 2015 analysis). Among most prominently reported topics that increased the EU’s visibility in the qualitative sample are COVID-related issues, economic matters (in line with the dominant perception of the EU as a trade partner for Canada and regulation of tech companies) as well as consequences of Brexit and EU sanctions against Russia.

Similar to traditional print *media*, Europe’s visibility in *social media* is higher than that of the EU. The peak in Europe-related posts on 19 April is linked to the discussion around the creation of the football’s European Super League. In the case of EU related mentions, several peaks could be identified visually. However, the clear reason for these peaks is not evident.

Visibility of EU institutions and EU leaders. Visibility of EU Member States and their leaders.

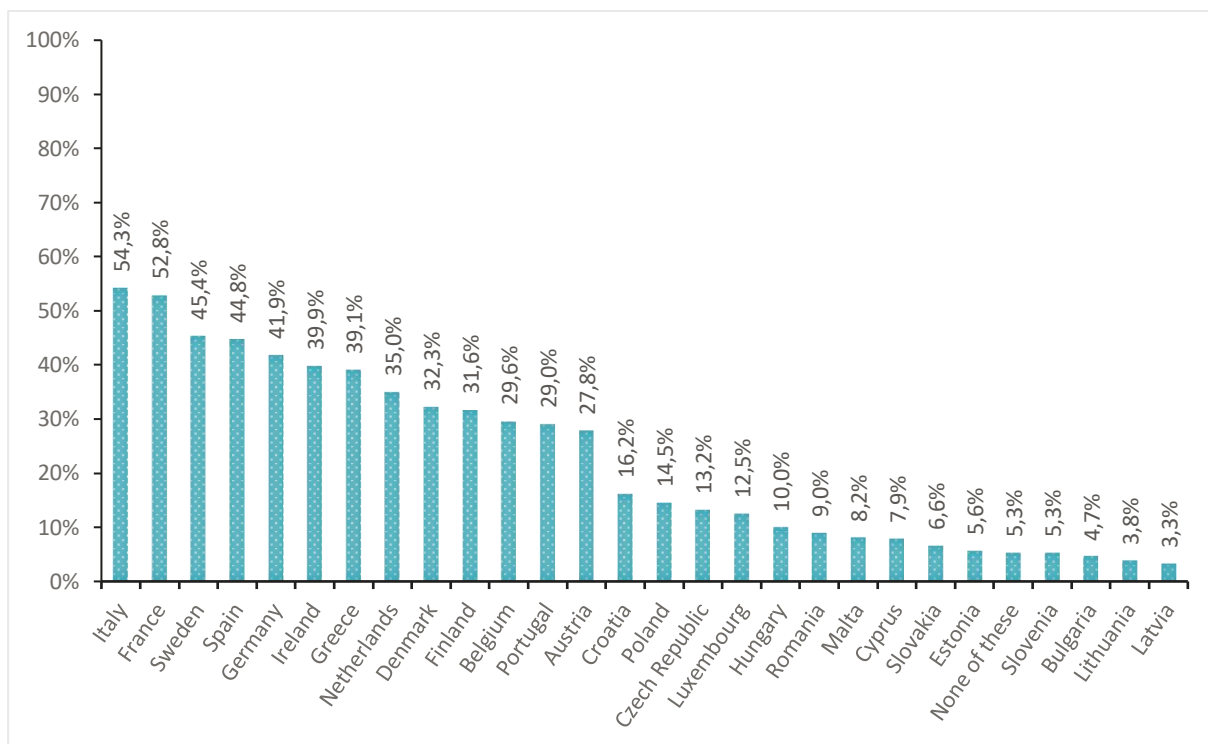
In the “EU” and “Europe” datasets, the most mentioned EU institution is the European Commission (appears in 180 Canadian press articles). The *press* also pays significant attention to the European Medicines Agency (135). Less noticeable are the European Central Bank (65), which was the most visible

EU institution in 2015, followed by the European Parliament (22), European Council (13) and European Investment Bank (1). In 2015, the Greek Eurozone crisis was the dominant story -- including the ECB's involvement in the crisis -- whereas COVID overshadows the 2021 media analysis, increasing the role of the EMA and the European Commission in 2021, the latter being often portrayed as a lead actor in the EU's response to the pandemic. The European Commission (779 mentions) and the EMA (527) are also the most visible EU institutions in Canadian *social media*, followed by the European Parliament (428). To a much smaller extent, social media reference the European Council (90), the ECB (86) and the European Investment Bank (58).

The most mentioned Member States in the *press* and *social media* are France and Germany, which was already the case in 2015 (along with, back then, the UK). Both in 2015 and 2021, this has to do with the fact that both countries not only feature in regular EU news (for example, the Greek crisis in 2015, the COVID-19 pandemic in 2021), but also on issues of "high politics" such as international sanctions (for example: Germany with Russia and Navalny) or multilateral diplomacy. In general, however, several countries are mentioned more often in the "EU" dataset if compared to the "Europe" dataset – Belgium (54%), the Netherlands and Denmark (each 47%), Sweden (45%) and Italy (43%). In the corpus of Canadian *social media* posts, most frequently mentioned are Germany (1,511), France (1,448) and Italy (1,157). All those countries are mentioned in the context of COVID in Europe, except for Italy, which also receives coverage in the context of Mario Draghi's appointment as a Prime Minister. In addition, Italy tends to receive quite a lot of coverage in *The Globe and Mail*, because the newspaper's permanent correspondent for continental Europe is based in Rome. As opposed to 2015, Greece is not visible at all in the 2021 analysis, and, like in 2015, Central and Eastern European countries have very limited visibility.

References to of individual leaders and politicians reflect the visibility trends observed for EU institutions and Member States. Ursula von der Leyen is the most frequently named EU official in both the *press* (68 articles) and *social media* (276 times – a number that largely exceeds the mentions for all other officials). In the *press*, she is followed by Christine Lagarde (22) and Charles Michel (15), and in social media, by Charles Michel (61) and Josep Borrell (30). The qualitative media analysis confirms that Ursula von der Leyen is the most frequently named EU official in relation to COVID or vaccine policy stories. This may explain her overwhelming social media presence too. While the profile of the President of the European Commission seems to have grown since 2015, the visibility of ECB and EEAS leaders remains stable in time, and the President of the EU Council Charles Michel remains in the shadows. As for Member State officials, Emmanuel Macron tops the list in the traditional *media* (58 articles), followed by Mario Draghi (47) and Angela Merkel (44), while the top three on *social media* are Angela Merkel (56), Emmanuel Macron (45) and Viktor Orban (33).

FIGURE 11. ATTRACTIVENESS OF THE INDIVIDUAL EU MEMBER STATES. CANADA



Note: based on Q25: Please indicate which European countries look the most attractive to you? Respondents could choose more than one country (n=1150). Respondents were not limited in the number of countries they could name.

As in the general public *survey*, *focus group* participants (undergraduate university students) stress *unity* and *peacefulness* as two defining features of the EU. Students are knowledgeable about EU institutions, and in terms of Member States they mention Germany on several occasions during the discussion – often as a role model for what the EU stands for. Poland or Hungary are mentioned when addressing identity related topics such as nationalism and the rights of sexual minorities, something which did not come up in the 2015 Study. France is not mentioned as frequently as Germany, which might have to do with the fact that only one student in the group was studying at a Québec university.

In terms of the most visible Member States, most *interviewees* agree on the main European partners being France (especially, but not exclusively in Québec), Germany (seen as a country that often leads by example), Italy (usually mentioned as the third “leg” of the EU “Big Three”), the Netherlands (on trade aspects), and of course the UK (in the context of Brexit). Together with the findings from traditional and social media analysis, these comments echo the perceived attractiveness of individual EU Member States by the Canadian public (Figure 11).

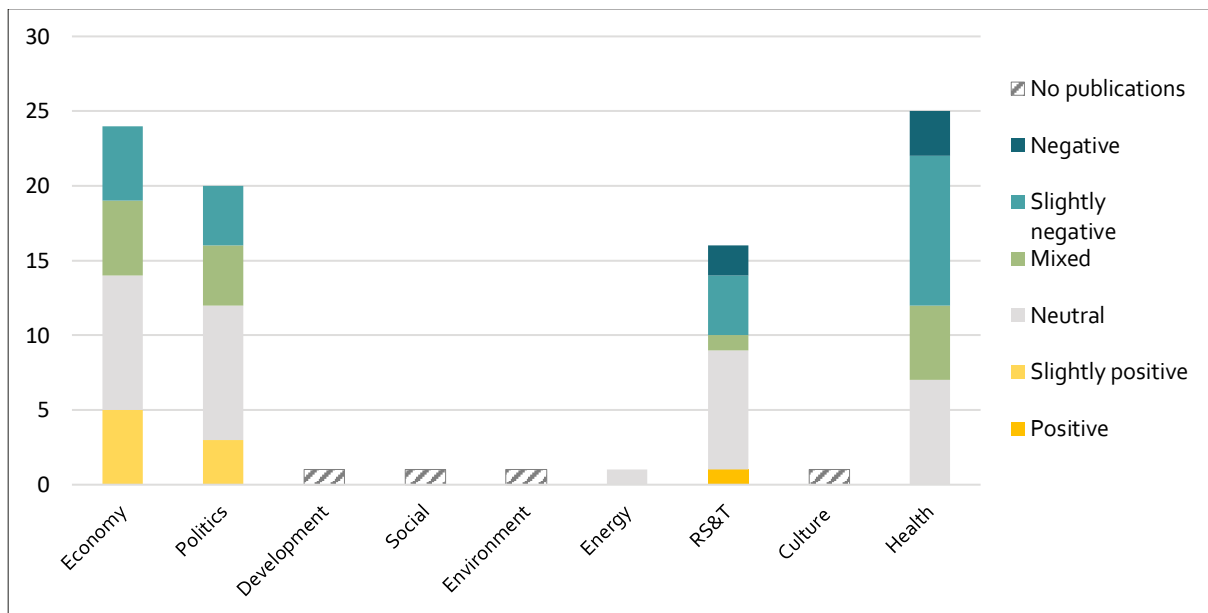
In addition, many interviewed influencers and multipliers do mention Brexit as part of the recent evolutions in Canada-EU relations, though most conclude that it has not led to the shockwaves that some businesses anticipated. When comparing with 2015, little has changed in terms of the EU’s visibility in the eyes of experts, except for the UK, which used to be included in the list of the most influential EU Member States back then.

Emotive charge

The overall evaluation of the EU in the Canadian *press* is mostly neutral, with “slightly positive” and “positive” sentiment prevailing (around 40% vis-à-vis 15% of “negative”/“slightly negative”

evaluations) (Figure 12). When looking at the qualitative sample, composed only of the articles where the EU is of a major focus, the picture is slightly less positive: 21 out of the total of 69 articles reveal a “negative” or “slightly negative” outlook, as opposed to 7 with a “positive” to “slightly positive” evaluation. Negative framing is particularly apparent in *The Globe and Mail*.

FIGURE 12. EMOTIVE CHARGE IN PRESS ARTICLES REPORTING ON THE EU AS A PRINCIPAL SUBJECT. CANADA



Note: Based on qualitative media analysis conducted by country experts. One article can reflect more than one theme.

In *social media*, the emotive charge of the EU-related posts is rather negative (45.1%), ceding to positive (30.9%) and neutral (23.9%). Politics and health themes generate the most posts and have the highest share of posts in negative tone.

Continuity and change behind visibility and emotive charge

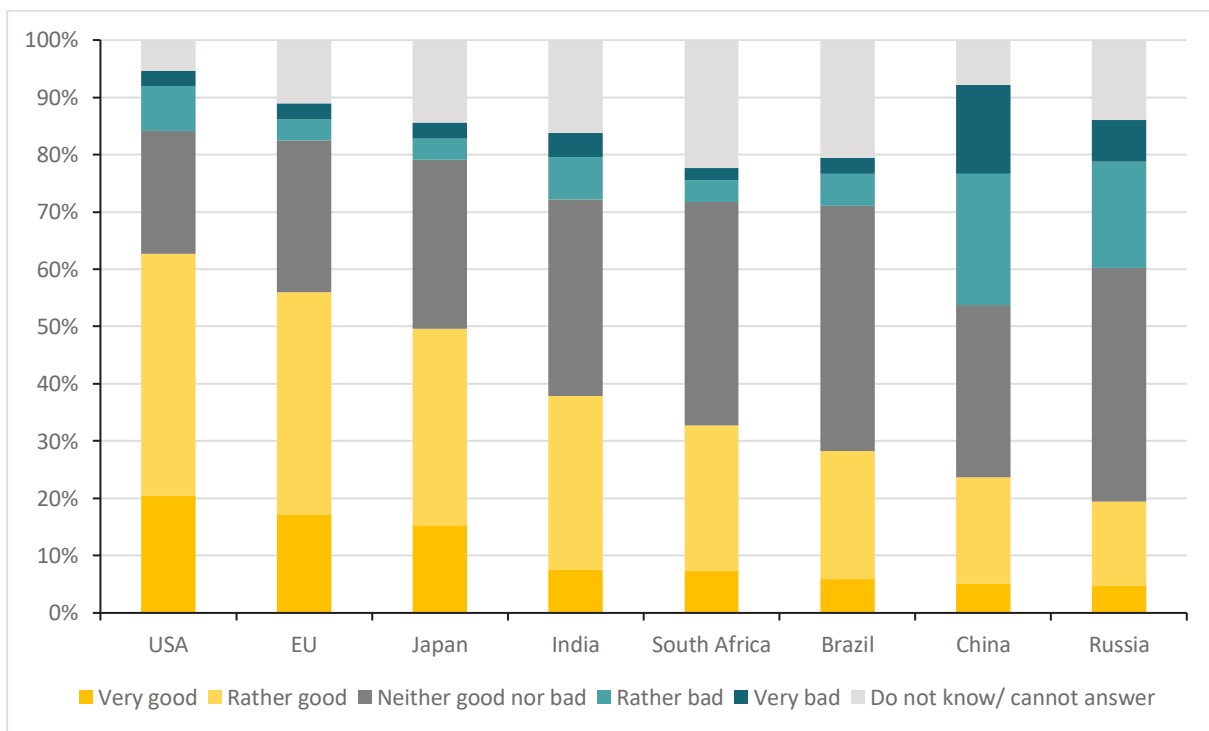
As in 2015, *traditional media* (press) coverage in 2021 focuses mostly on unusual events. COVID has replaced the Greek Eurozone crisis as the number one topic. This is also reflected in the most mentioned institutions and actors further confirming a finding from the 2015 Study that the EU’s media visibility depends largely on the leading controversial stories of the time – often crises – that happen on the continent. Looking at the *press* analysis, the 2021 data also show that, even though the largest part of the news coverage remains neutral in tone, the share of both positive and negative articles has slightly increased compared to 2015. The news reporting on the EU, its actors and policies with a major centrality tend to do so from a more negative perspective linked to the COVID contexts. Positive evaluations are seen on topics such as the regulation of big tech companies. EU-Canada events or joint policies (e.g. related to the CETA) tend to be depicted more neutrally. Finally, both the *focus group* with educated youth and *interviews with Canadian multipliers and influencers* showcase a mixed emotive charge. While some interviewees and focus group participants consider recent events such as Brexit and the hectic vaccine roll-out as renewed signs of the EU’s inability to stay away from crises, others see a major improvement from 2015 and believe that the EU has come out stronger, more united and resilient over the past five years.

1.2.3. Actorness and local resonance

The EU as a partner

The academic literature on Canadian perceptions of the EU stresses that the EU has always been seen as a like-minded partner for Canada, especially on the economic side. According to the interviewed multipliers and influencers, ‘like-mindedness’ between the two countries has grown stronger between 2015 and 2021, and it has even become a political motto for the leaders from both sides. A Canadian interviewee notes how this notion of like-mindedness has been pushed on the agenda and in official statements again and again since 2015. Several interviewees suggest that the “Trump years” in the US contributed to bringing Canada and the EU closer to one another. However, the 2021 public opinion survey shows that the public still considers the US to be the country, with which Canada has the best relationship (Figure 13). The EU, however, comes a close second – and very far ahead of major powers like India, Brazil, China or Russia. 72% of Canadians “strongly agree” or “agree” that the EU is a major partner to Canada in international relations, as opposed to 4.5% that “disagree” or “strongly disagree.” 60.5% of respondents even consider that both should have stronger political ties. This is a significant improvement from 2015 when 63.4% of Canadians “strongly agreed” or “agreed” that the EU was a major partner to Canada in international relations. This finding mirrors the 2021 perception studies in that the Trump Administration appears to have pushed Canadians closer to the EU.

FIGURE 13. EVALUATION OF CANADA RELATIONSHIP WITH THE EU AND OTHER COUNTRIES. CANADA



Note: based on Q3: Which of the following words best describes your country’s overall relationship with each of the following countries and organisations? (n=1018)

In general, three main perception themes can be drawn from the content of *interviews* with Canadian influencers and multipliers. Firstly, interviewees point to the need to distinguish between various groups of stakeholders/audiences when thinking about Canadian perceptions of the EU (e.g. the public

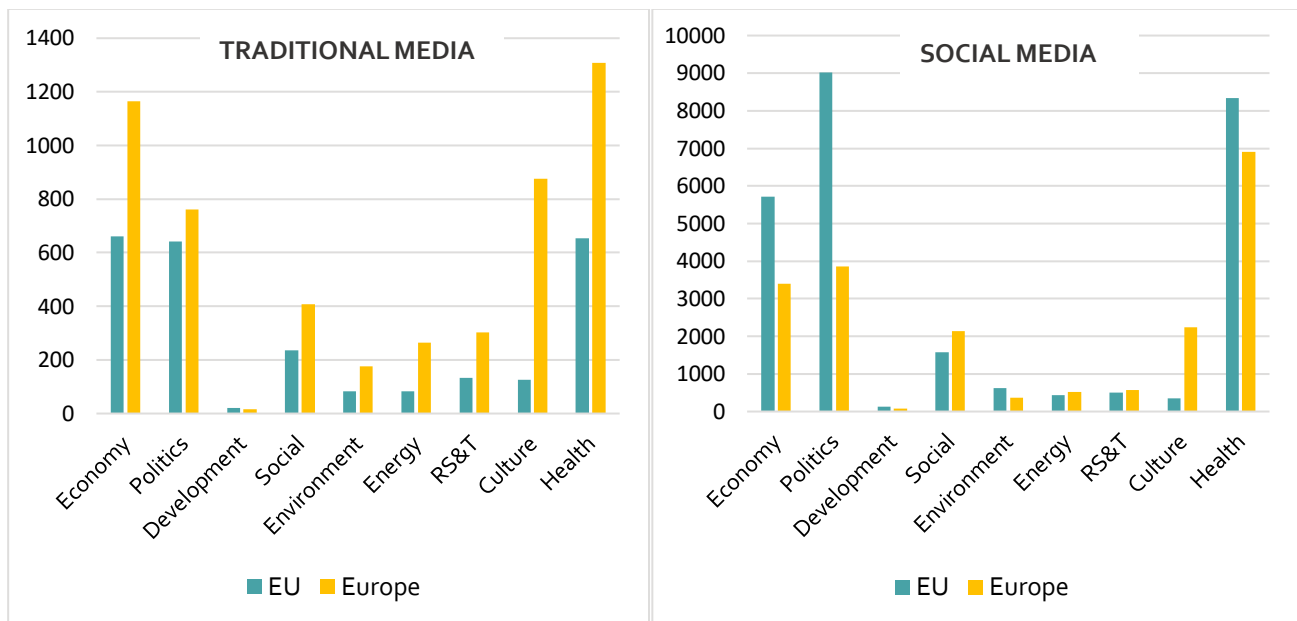
at large vs. policy-makers or business, small businesses vs. large businesses, Western vs. Eastern provinces). This was already central in the views of decision-makers in 2015.

Secondly, interviewees claim that the EU has a generally limited visibility among Canadians, even in the context of the recent progress with the Comprehensive Economic and Trade Agreement. On the CETA, some observe, there would be a general awareness of some form of trade partnership with the EU, but the public would not really know more than this. One interviewee from the business community says: ‘I don’t mean to be too cynical, but people’s attention span is short’. He further explains that ‘there is competition for attention’ when you aim to promote trade agreements in Canada, and that, since the CETA, other important trade deals with the Pacific region, and above all Mexico and the US (CUSMA – the new NAFTA), have taken over in the minds of the public.

And thirdly, interviewed multipliers and influencers express and value a general sense of like-mindedness, or positive “we-feeling”, for many Canadians when they are asked about how they view Europe or Europeans in general. This should not be seen as an indication that Canadians and Europeans agree on everything (including with regard to norm-setting), but that there is a sense of trust and ability to speak openly about various issues. ‘Europe is like the family’, says one interviewee, ‘You can think: oh God, why are they doing that? But it’s still the family. So, if your brother messes up, you won’t let him go’.

In the qualitative traditional *media* sample, 26 out of 69 articles have a “local hook”, 16 of which are with a primary one. These articles prominently deal with Canada-EU vaccine diplomacy and the EU’s export restrictions on Europe-manufactured vaccines. The other two EU-focused topics that received some coverage in relation to Canada are international sanctions (against Russia and China) and the comparative attempts of the EU and Canada to regulate big tech companies. Only one article deals with the CETA, which confirms the interviewees’ perceptions that the trade agreement only has limited visibility for the public.

The qualitative analysis of print media shows a great contrast between the three outlets selected for the analysis. In reporting about the EU, *The Globe and Mail* relies almost exclusively on its own reporters: Eric Reguly, permanent correspondent for *The Globe and Mail* in continental Europe (based in Italy, 10 articles), and Paul Waldie and Mark MacKinnon, the two *The Globe and Mail* UK-based correspondents (10 articles combined). *The Globe and Mail*’s local staff writers also contribute to some articles (on COVID vaccine export). In the *National Post*, only two articles from the sample are written by the journal’s staff. The *National Post* does not have a permanent correspondent in Europe. All other articles are based on international sources, most prominently *Reuters* (9 articles) and *Bloomberg* (8 articles). The trend is the same in the *Calgary Herald*, which heavily relies on shorter stories originating from *Reuters* or the *Washington Post*. The “local hook” to the EU is more prominent in *The Globe and Mail* (one out of two articles with a minor or primary local focus) than in the *National Post* or *Calgary Herald* (one out of three).

FIGURE 14. THEMATIC FOCUS OF SOCIAL MEDIA AND PRESS ARTICLES REPORTING ON EU AND EUROPE. CANADA

Note: based on automated quantitative data analysis. Includes press articles which report on the EU and Europe as a principal or a secondary subject of the article. One article can reflect more than one theme.

In the observed Canadian *press*, the “EU” is most often mentioned regarding the economy (25% of total), health (25%) and politics (24%). In 2015, the economy accounted for roughly half of the total number of articles, while politics was already at around 25%. Health was a non-issue, and social and cultural issues were more prominent than in 2021. For “Europe”, health (25%), economy (22%), culture (17%) and politics (14%) come first. The “Europe” dataset shows much greater focus on culture compared to the “EU” data, especially in the French-speaking *Journal de Montréal*. Politics on the other hand is a less important frame in the “Europe” dataset. In both “EU” and “Europe” datasets, the themes of development (0-1%), energy (3-5%) and the environment (3%) are almost insignificant, which was already the case in 2015.

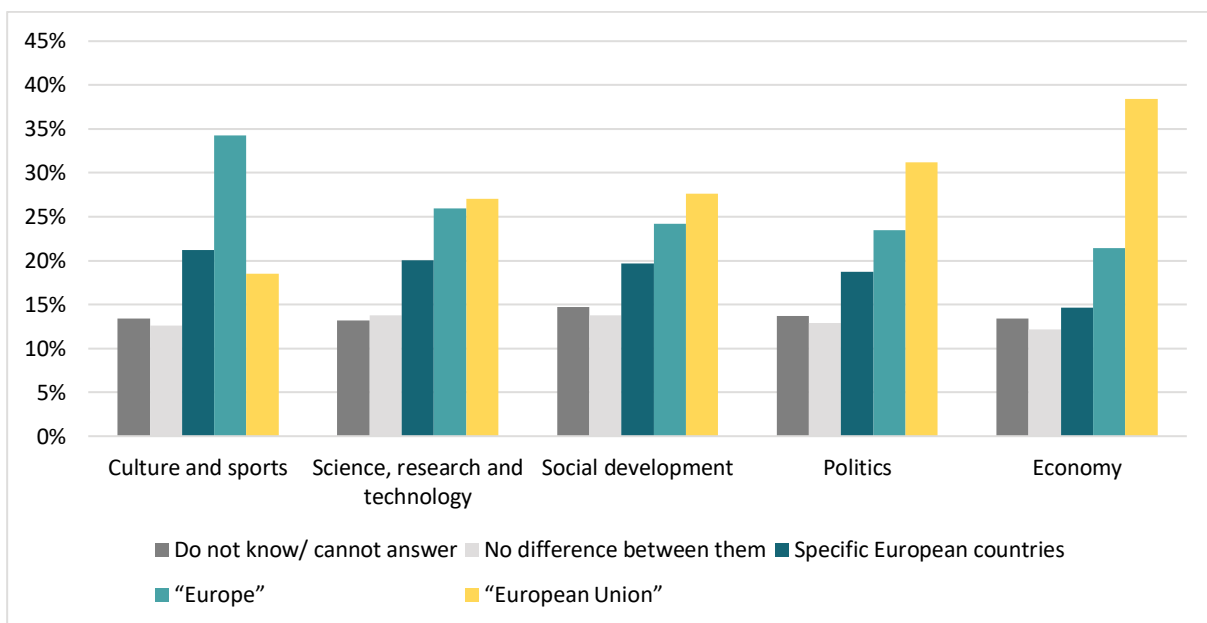
Looking at the qualitative sample, almost half the total articles (31 of 69) deal with health/COVID-19 pandemic, some with an EU-specific dimension (Europe’s ineffective vaccine rollout), but the most visible ones in size and placement deal with the impacts of the EU’s vaccines export regime on Canada. 19 articles address internal politics in the EU, particularly Brexit and its consequences (e.g. Northern Ireland). Only 8 articles focus on external politics, almost all of them with a focus on Russia (EU reactions to Russia’s vaccine diplomacy, military build-up in Ukraine, Navalny and international sanctions). 23 articles focus on economic themes, half of which are on the EU’s trade policy and trade deals – mostly the EU-UK post-Brexit deal. Finally, in 2021, an unusually high share of articles (19) feature research, science and technology, although still in the context of COVID and innovations in the health sector.

The distribution of thematic frames in Canadian *social media* is not very different from the traditional *media*. The EU is most often mentioned with regard to politics (33.8%), health (31.2%) and the economy (21.4%). In comparison to the EU, Europe was more often mentioned in connection with cultural (11.2%) and social themes (10.6%), as Canadians tend to associate the EU primarily with the economy and politics whereas they associate Europe with culture. Politics tends to take more space than economics on *social media*, as opposed to the traditional *media*. There is a particularly strong focus on economic

frames in the Canadian print media, as the two major nation-wide dailies (*The Globe and Mail* and *National Post*) both self-describe as broadsheet dailies that cater primarily to economic elites. Finally, when looking at the emotive charge of the different themes in *social media*, it appears that the environment (approximately 44%), research, science and technology (approximately 43%), and especially culture (approximately 55%), are framed positively, whereas health, politics and social issues receive the most negative coverage (30-35% of positive evaluations vs. 45-48% of negative evaluations).

Economy and trade

FIGURE 15. ASSOCIATION OF DIFFERENT AREAS TO THE EU VERSU EUROPE. CANADA

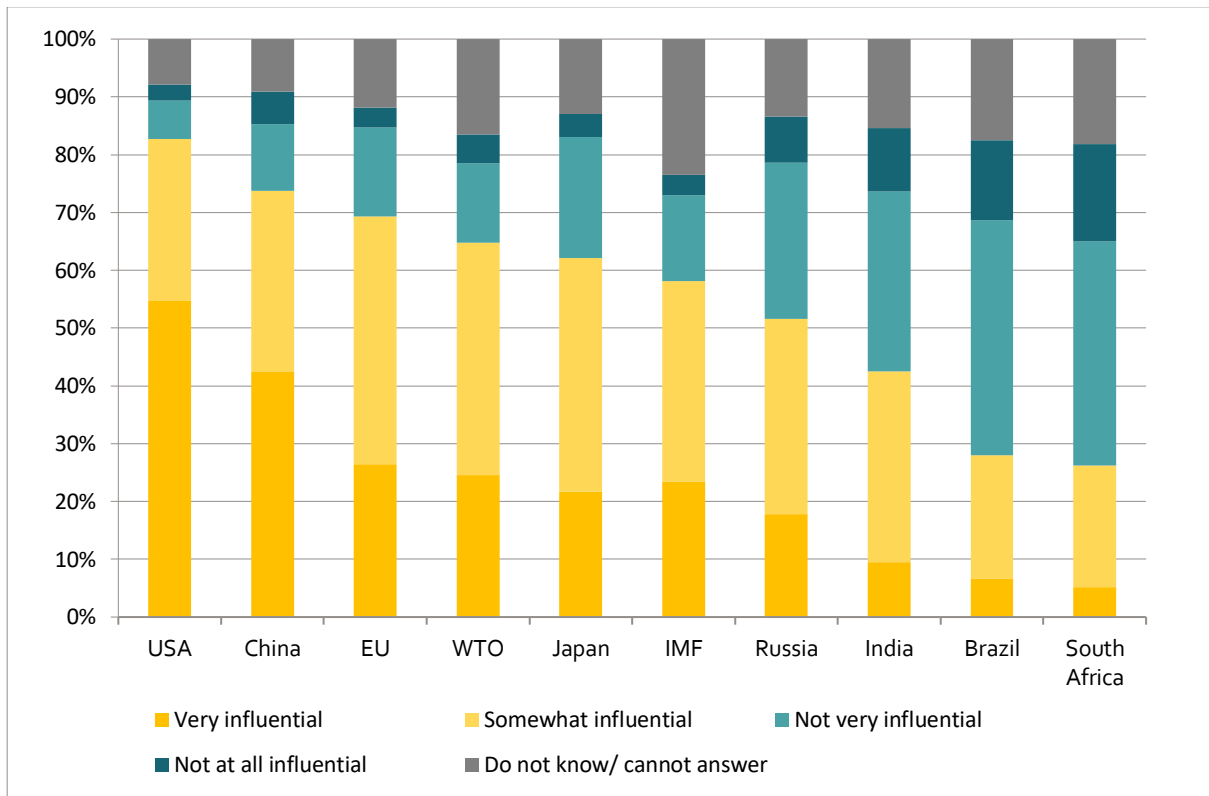


Note: based on the answers to Q22: Some people think about Europe, whereas others think about the European Union when talking about economy, politics, culture, sports and other areas. In your case, which term – Europe or the European Union - comes to your mind first when you think about the following subjects? (n=1018)

**Please note that in 2015, this question was accompanied by a chart in a different format under the section “Research, science and technology”. The wording and answer categories used in this question have changed in 2021, making it inappropriate to conduct historical comparisons.*

Economy is traditionally the dominant theme in Canadian perceptions of the EU, as the Canadian public and decision-makers most prominently regard the EU as a trade partner. This is reflected in the academic literature, and is confirmed in the 2021 survey, where 69.8% of respondents “strongly agree” or “agree” that the EU is an important trade partner for Canada (vs. 4.3% who “disagree” or “strongly disagree”). Most Canadians also believe that the EU is an important investor in Canada, an important partner in science, technology and research, and that economic ties between the EU and Canada should be reinforced (64% “strongly agree” or “agree” with the latter, vs. 5.9% who “disagree” or “strongly disagree”). Still unsurprisingly, Canadians also consider that the EU’s influence in global economic affairs, while significant, remains below that of the US or China (Figure 16).

FIGURE 16. EU INFLUENCE IN GLOBAL ECONOMIC AFFAIRS COMPARED WITH COUNTRIES AND INTERNATIONAL ORGANISATIONS. CANADA



Note: based on the answers to the survey Q6: In your view, how influential, if at all, in global economic affairs are the following countries and organisations? (n=1018)

Interviews with national influencers and multipliers do not come up with markedly different conclusions. All interviewees concur with the idea that the US remains by far the dominant economic partner. Several of them, and the majority of focus group participants, consider that, as a consequence, trade diversification is needed more than ever for Canada, and that the EU certainly constitutes the most stable alternative. Focus group participants see the CETA as a marker of economic stability. Most disagreements have to do with the place of China, regarded as economically unavoidable but increasingly controversial. On the CETA, one business stakeholder from the food industry summarises the sector’s frustrations with EU technical barriers and standards that continue to limit Canadian meat exports to the EU. Apart from the CETA, two interviewees mention IT, AI and robotics, as promising avenues for economic cooperation between the two parties. The Canadian business community seems to trust European IP and data privacy standards.

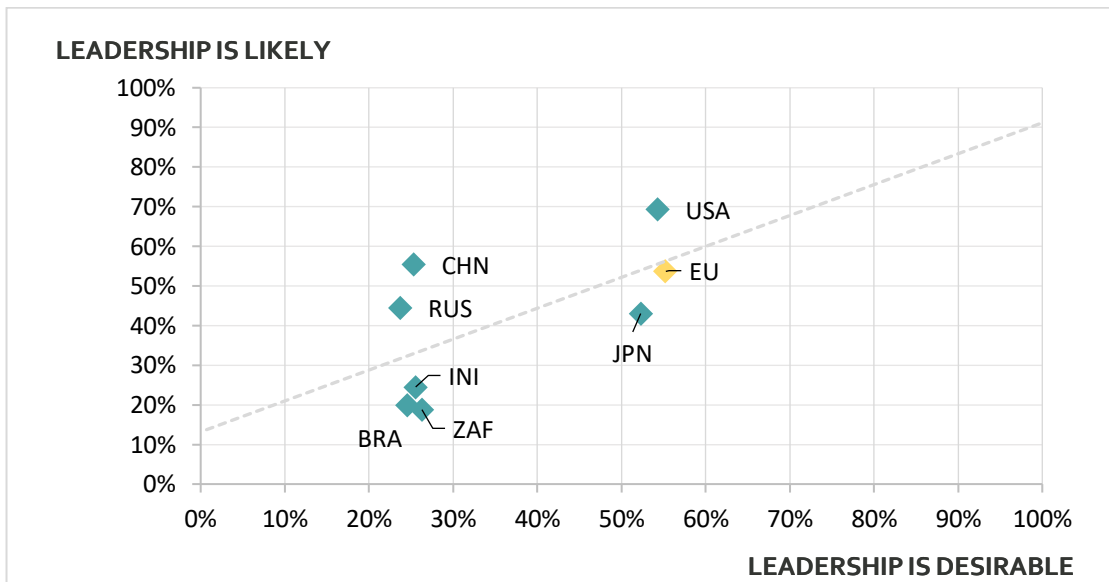
Politics

Alongside the economy, interviewees usually rate politics as the second most important theme in the strategic relationship between Canada and the EU. Focus group participants even rate it as more important than the economy. Several interviewees point to the fact that politics has become more important over the recent years, as a result of two concurring developments: the Trump Presidency in the US, and the presence of a liberal government with Justin Trudeau in Canada. Both result in Canada and the EU aligning more closely to defend the multilateral global order (as ‘bastions of multilateralism’), which gives more prominence to the so-called concept of “like-mindedness” between Canada and the EU. In a similar assessment, focus group participants point to the role of the EU and

EU Member States in consolidating international rules. ‘Everything seems to be in Europe’ when you think of international institutions, observes one participant. However, with the change to Biden’s Presidency, some interviewees also fear that there might be a risk of Europe going back to treating Canada ‘as a state of the US’, i. e. as an afterthought, as documented already in the 2015 Baseline Study. In addition, growing Canada-EU like-mindedness is not just influenced by the US dynamics, but also results from China’s rising assertiveness. ‘China is on the top of no one’s list anymore, even if it’s economically necessary. So, there is an opportunity for Europe’, says a retired Canadian diplomat.

Like-mindedness is also reflected in the *survey*: Canadian respondents see the EU as a global power whose leadership role in global affairs is the most desirable, ahead of the US and Japan. Respondents indicate however that they think it is more likely that the US and China would play such leadership roles in the coming years (Figure 17). These numbers and trends remain unchanged since 2015. Interestingly, survey respondents credit the EU with a strong role to play in maintaining international peace and stability (“very” or “somewhat important” for 74.6% of the respondents). The EU comes third in this regard, only preceded by the US (78.5% for (“very” or “somewhat important” answers combined) and the UN (74.7%), and ahead of Russia (64.1%), China (64.9%), or more surprisingly, NATO (70.9%). When asked about the areas of foreign affairs and diplomacy that the EU performed well in, the general assessment is fairly positive, but a significant number of respondents (16-17% on average) chose not to answer, and no area stands out significantly. Support for regional cooperation (57% of respondents see the EU’s performance in this sector as “very good” and “fairly good”), justice and the rule of law (55.4%), media freedom (54.7%) and the fight against climate change (56.1%) are rated slightly more positively than the support to developing countries (48.1%) and to refugees (44.1%), and the participation in military operations (43.4%).

FIGURE 17. DESIRABILITY VS. LIKELIHOOD OF EU GLOBAL LEADERSHIP COMPARED TO OTHER ACTORS. CANADA



Note: based on Q4: How desirable is that each of the following countries and organisations take a strong leadership role in world affairs? And Q5: how likely or unlikely is it that each of the following countries and organisations will take a strong leadership role in world affairs five years from now? (n=1018) The horizontal axis presents the sum of “Very desirable” and “Somewhat desirable” responses to the Q4. The vertical access presents the sum of “Very likely” and “Rather likely” responses to Q5.

Climate and Environment

The environment is possibly the most difficult perception theme to assess in the Canadian context – since it appears as very central in some parts of the research (*interviews with multiplier and influencers* and *focus group*, and *opinion survey* to some extent), but as quasi absent in other parts (*media analysis*). The *survey* points to Canadians seeing a central role played by the EU in fighting climate change and protecting the environment. 45% of the respondents believe that the EU plays a “very important” role in this regard, plus 29.5% a “somewhat important” one, as opposed to 13.9% arguing for a “not very” or “not at all” important role. In 2015, 36.4% thought that the EU played a “very important” role, and 30.7% thought it was “somewhat important” meaning an increase in the acknowledgement of the EU’s leadership role in fighting climate change. The EU is perceived as a more important actor in comparison to other actors mentioned in the survey – roughly on an equal footing with the US (75.9% “very” or “somewhat important role”), and ahead of the UN (70.2%). Moreover, EU actions in the field are deemed “very positive” (22.2% of respondents) or ‘somewhat positive’ (41.5%), as opposed to 19.4% of “very” or “somewhat negative” evaluations. As a point of comparison, the US’ role is rated as positive (very or somewhat) by 56.9% of the respondents, and as negative by 31.9%. The UN’s figures (61.4% “very” or “somewhat positive”) are quite comparable to the EU’s.

Interviews with multipliers and influencers and the *focus group* consistently rank the environment/climate change in top two or three areas of strategic cooperation between the EU and Canada. Several interviewees are keen on viewing the EU as a role model on climate action. Europe is seen as leading the way and showing the rest of the world that an ambitious climate agenda could work (CANPOL1). Most focus group participants agree with this emulating role of the EU for Canada. Even though Europe has a lot to teach, on climate governance (commitments and holding governments accountable), according to a Canadian climate change activist (CANCSO1), for some Canadian stakeholders, ‘this so-called climate leadership sometimes appears greater on paper than it actually is’. One participant in the *focus group* discussion shares a similar view, ‘when you place yourself as a role model, you should back up what you say with real actions’, which is not always the case (CANFG1). Another nuance is brought by a representative of the business community who argues that at the end of the day, like with economics or politics, Canada is mostly influenced by what happens in the US: ‘Let’s be blunt: our climate policy is the US climate policy, more or less. We have no choice in this country than to align with the Americans, broadly speaking. Oil and gas, electric vehicles... is all about the North American market’ (CANBUS1).

Given these discussions, one would have expected greater *media* visibility of the theme, which is however not the case. EU actions in climate and environment remain notably absent from the news coverage in the 2021 analysis. As a result, the general public may have an intuitive, somehow general feeling that the EU is active on the front of the climate change agenda, though it would not know in great detail what the EU actually does (CANCSO1).

Energy

In Canada, energy-related discussions are hardly separable from the environment, given how important the resource extraction industry is in the country. Energy transition is therefore a core focus of the climate action agenda, and as a result, interviewees tend to associate the two themes very closely. For example, President Biden’s extremely ambitious energy transition agenda is seen as a game-changer for Canada’s climate action agenda moving forward, given the numerous energy corridors that exist between the two countries (CANCSO1). As with the environment however, these energy-related concerns and discussions receive no visibility at all in the media during the timeframe under analysis. In 2015, when covered, although rarely, most of the energy framing of the EU and Europe was in terms of sustainability. In 2015, in the dataset “Europe”, the European carbon market and renewable energies were discussed occasionally. One exception to this environment-focused framing of energy issues

comes from the focus group discussion, where one participant – a student in International Relations – flags the EU’s energy dependency on Russia as a factor of geopolitical weakness.

Research, Science and Technology

Research, science and technology (RST) is another theme that has traditionally received scant attention in the Canadian *media*, though the particular context of the COVID-19 pandemic has brought a number of stories that focus on research innovation in the health sector. In the *survey*, the Canadian public does perceive the EU as an effective player in science and research (62.3% respondents believe it performs “very” or “fairly good” on the matter, vs. 5.5% “very” or “fairly bad”). However, the EU ranks behind the US, China and Japan in terms of how Canadians view its ability to advance innovation and technological progress in the world, with 37.5% of respondents stating that the EU has a “very important” role to play in that area, vs. respectively 53.7%, 44.6% and 47.5% for the other three actors. This is still an improvement when only 17% of respondents considered the EU to perform “very good” in the area of RST in 2015. In general, RST is also not flagged as a significant theme of Canada-EU cooperation by interviewees, with the exception of academics. *Focus group* participants tend to stress the importance of education exchange programmes such as Jean Monnet and Erasmus+ rather than RST cooperation as such. The Erasmus programme is well known throughout the world, and thus appears more frequently in the conversation. It is especially relevant for undergraduate students (focus group participants), who put more emphasis on student mobility than on international research.

Development and assistance

When asked about the main global powers’ role in supporting developing countries in their security and development objectives, Canadians again rank the EU quite high (72.5% say it has a “very” or “somewhat” important role to play), but quite far behind the US (84.4%), and on an equal footing with the UN (72.9%). All other actors are seen as having a less important role. This being said, development is virtually a non-topic both in the *media* and during *focus group discussions* and *interviews with influencers and multipliers*. As such, there is very little to report on in this category.

Social

Though not generally seen as a major theme, social issues do occupy a certain place in Canadian perceptions of the EU. In terms of *media (press)* presence, the visibility of social issues is limited. This is in sharp contrast to 2015, where the refugee crisis led to a significant coverage of social issues. In the *public opinion survey*, respondents rate most favourably the EU’s ability to promote a good level of education and the overall quality of life (“very good” and “fairly good” by approx. 70% of respondents). At the other end of the spectrum, and though they are still assessed positively for the most part, the reduction of poverty (46%) and income inequality (42%), the protection of minorities (46%) and the integration of migrants (45%) receive slightly less praise. Themes and figures are almost identical to 2015.

Looking at interviews and the focus group, one interviewee points to the public’s general interest for societal issues in Europe when they connect with EU domestic debates, such as the rights of sexual or racial minorities, or gender equality. This is confirmed by a media interviewee who notes some interest in stories surrounding LGBTQ+ rights and migrant integration in Europe. Another interviewee is particularly critical of the EU’s record in failing to condemn policy developments in countries like Hungary and Poland – ‘fascist countries that are accountable to no one’. In general, youth taking part in the focus group discussion are more critical of the EU in this issue-area than interviewees, especially regarding the failed integration of migrants. Students further highlight the EU’s lack of leadership on gender issues, as symbolised by photos of EU summit meetings where women in leadership positions are a rare thing.

Culture

The image of Europe as a cultural power remains strong for Canadians. The *survey* shows that the EU comes first in the list of countries valued for their attractive lifestyle (70.8% of the respondents found it “very” or “somewhat attractive”), slightly ahead of Japan (67.9%), and with a 10 points advantage over the US, in the third spot (60.9%). The EU and/or Europe score very high on several items related to culture and lifestyle, most prominently with history, monuments and museums, food and cuisine (approx. 70% of “very positive” and “fairly positive” evaluations). Contemporary lifestyle items (for example, sports or cinema) are evaluated slightly less favourable, though still with 65-70% positive ratings on average.

When it comes to culture, there is a strong confusion in the public between Europe and the EU, to the extent that the EU as such has little to do with cultural policies. This is actually noted by an interviewee working in the field, who speaks at great length about Canadians’ love for European culture but notes that ‘you don’t hear the word “culture” very often when it comes to the EU in Canada’. This interviewee further observes that there has always been an appetite in the Canadian public for European shows. Even though other regions of the world matter, none except for the US comes close to how influential cultural production from Paris/Brussels/Rome-Milan/Berlin could be, especially in the area of performing arts. In a similar way, the *media* analysis shows a much greater number of stories focusing on culture in the “Europe” dataset as opposed to the “EU” one (Figure 14). Moreover, in the qualitative media sample that focused on the EU as a major focus, there were no articles framing the EU in the cultural sector.

Health

Because of the COVID-19 pandemic, health has become a significant theme in the 2021 analysis, much more so than could be traditionally expected. The number of news stories featuring health in the *media* analysis has been largely overrepresented. In terms of evaluation, there is somehow a mismatch between the public’s view that the EU is performing well in the areas of global health or medical research (73% of respondents think it performs “very” or “fairly good” on the first issue, 64.9% on the second one), and the *traditional media* and *social media* framing where the EU has failed to cope well with the COVID-19 pandemic and the vaccine roll-out.

Interviewees also reveal no further consensus as to how the EU has performed in terms of fighting the pandemic. Some interviewees see the EU’s slow vaccine roll-out as yet another sign that the EU is struggling to act decisively and in a united manner during crises. Others, including focus group participants, mostly find that the EU has shown strength, resilience and the ability to fight the COVID crisis in a united manner. During the interview with the Delegation of the EU to Canada, it was also observed that Canadians were unfortunately not aware for the most part that all the vaccines they were injected with were manufactured in Europe and exported to Canada.

Continuity and change behind actorness

Based on the various research methods utilised in this analysis, the overall picture of Canadian perceptions of the EU is mainly one of continuity. As is already documented in the 2015 Study, Canadians share a lot with the EU/Europeans in terms of worldviews, economic, political and social preferences, geopolitical interests, and these trends hold in the 2021 Study.

Looking at the elements of continuity amongst the major *themes* discussed above, economics still plays a central role. Canadians view the EU above all as a powerful economic bloc and market, with a commitment to open trade. The implementation of the CETA has contributed to that image. While the public in general and focus group participants consider China the most likely power to influence the

global economy in the future, alongside the US, several interviewees question the extent to which China's place as a central economic priority for Canada is still as strong as in 2015.

Another significant element of continuity is that environmental issues still occupy a weak place in the eyes of the public and the media. This is however in contrast with interviewed multipliers and youth interviewed, who share the perception that the EU does lead the way globally with its climate action agenda. The impact of the recent EU Green Deal agenda is yet to be seen.

Despite the overall continuity, some perceptions have evolved between 2015 and 2021. The main change is that political themes have gained in prominence. Whereas the EU was primarily seen by the public and decision-makers as a trade partner back in 2015, several interviewees and the focus group participants rank politics as the number one area of cooperation between Canada and the EU in 2021 – ahead of the economy. The perception of Canada and the EU sharing a joint commitment to safeguarding the multilateral, rules-based international order has become more central to Canadian influencers and to youth interviewed in the focus group than it was in 2015.

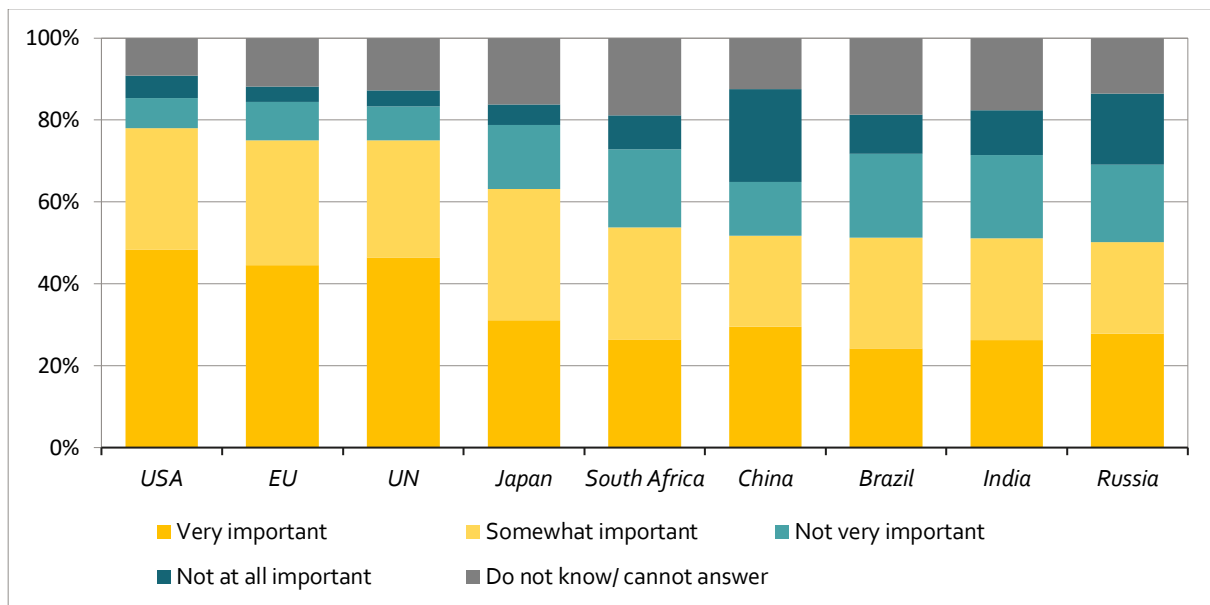
Back in 2015, social themes occupied a significant place in perceptions, because of the migration crisis, which prompted a peak of negative views in Canada regarding the EU's inability or unwillingness to cope with the crisis and more generally its failure to integrate migrants. Looking at 2021 survey indicators and media coverage, this negative peak has been largely overcome, though it is still referenced during the focus group discussion. Another social theme that has emerged in 2021 is LGBTQ+ rights in Central European countries such as Hungary or Poland.

Finally, according to public opinion survey, the rate of non-responses ("Do not know/cannot answer") seems to have decreased by a few percentage points between 2015 and 2021. While the EU often lagged behind other countries included in the survey responses in 2015 (e.g. Japan, India, Brazil, South Africa, etc.), this is not usually the case in 2021. This may suggest that the level of awareness of the EU has increased while the level of indifference towards the EU has decreased, and that there are usually more opinions about the EU in the country.

1.2.4. The EU as a norm-setter

Norm-setting is not generally speaking a significant framing of perceptions in the Canadian *media*. In the media's qualitative sample, only three articles (actually two – one of them being republished in the third outlet) report explicitly on the EU's normative power in connection with EU sanctions against Russian and Chinese officials. In addition, one could mention a series of articles on the EU's regulatory powers (such as regulating big tech companies, or anti-competition policy in the case of Air Canada and Air Transat attempting to merge), which is a specific kind of market norm often associated with the EU.

FIGURE 18. PERCEPTION OF THE IMPORTANCE OF EU, OTHER ORGANISATIONS AND COUNTRIES IN GLOBAL HUMAN RIGHTS PROMOTION. CANADA



Note: based on Q11: In your view, how important, if at all, 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? (n=1018)

Interviews and the *focus group* discussion are insightful with regards to norm-setting elements of perceptions, though these elements are rarely addressed directly, as a standalone topic of conversation. During interviews, several elements of EU norm-setting related to the CETA negotiation and implementation. These are the inclusion of provinces and municipalities in the CETA’s negotiation, which influenced Canada’s subsequent trade agreements, and the inclusion of a civil society angle (CETA’s Civil Society Forum), which was not part of Canada’s norm before. In the focus group, the one topic that came out of the discussion is digital privacy standards, where the EU has been able to set up rules that Canadian companies need to abide by.

On social and identity issues, some representatives of Canadian youth and civil society influencers and multipliers feel like Canada is ahead of Europe on some discussions related to LGBTQ+ rights, racism, decolonisation, or the reconciliation with indigenous people. There is a sense that growing nationalism in Europe might at some point impede international cooperation with some European countries, for example in the cultural sector.

When asked about the EU’s role in promoting human rights globally, around 75% of Canadians do consider this role to be important. The EU ranks the highest on this issue – roughly on an equal footing with the US and the UN. As expected from the literature on Canada-EU relations, and confirmed by the interviews and focus group, there is a general sense amongst the Canadian public that Canadians and Europeans share similar democratic principles (59.6% of survey participants “strongly agree” or “agree” with such statement, vs. 7.4% who “disagree” or “strongly disagree”). More generally, Canadians tend to align their own values with EU values, especially when it comes to respect for human dignity, liberty or democracy, hence the general appeal of the notion of “like-mindedness” often used by policy-makers. The idea that the EU could serve as a good example with regards to gender equality receives a slightly more mixed assessment, with 53.4% “strongly agreeing” or “agreeing”, but overall, the perception remains favourable here as well. Mostly it is in the focus group discussion that the most negative

perceptions of the EU's human rights record are found, with several participants pointing to a gap between words and actions.

Continuity and change behind the perception of EU as a norm-setter

The role of the EU as a norm-setter in Canada has been generally stronger in 2021 than in 2015, where it was quasi absent from perceptions. Canada and the EU are probably “closer than ever,” as both diplomatic communities like to remind the public on a regular basis, and the like-mindedness and similar worldviews between the two partners is a reality. However, Canadians certainly do not see their country as being on the receiving end of EU norm-setting behaviours, and they do not generally attribute a growing norm-setting role to the EU globally, as compared to other global actors. For example, it is true that respondents in the 2021 survey see the EU as having a greater responsibility to promote human rights than did respondents in 2015, but the US or China are also seen as having such responsibility. On these issues, the UN still remains the international actor with the greatest responsibility, according to the public.

1.2.5. Continuity and change

Looking at *exogenous* factors, the most significant driver of change has been the US Presidency of Donald Trump between 2016 and 2020 (a *region-specific* factor). As the academic literature and the 2015 Study have revealed, Canada's foreign policy is always determined to a large degree by what is happening on its Southern border. President Trump's unilateralist and nationalistic agenda has brought the EU and Canada closer to one another. In several international fora (UN, G7, WTO, to name just a few), Canada and the EU have aligned their multilateral agenda much more closely, with the aim to safeguard international rules in the absence of their usual American ally. Some of the focus group participants mention being surprised by the level of pushback that Europeans have implemented against initiatives by Trump. And this has impacted Canadian perceptions of the EU and bolstered this sense of like-mindedness, not only on political issues, but also on social ones.

More generally, interviewed youth believe that the EU has come stronger from the various crises it has experienced since 2015 (including Brexit and COVID, over recent years). This *EU-specific factor* has, according to them, contributed to Canadians holding a more favourable view of the EU than before.

Another factor – this time a driver of continuity – has been the provisional implementation of the CETA and the Strategic Partnership Agreement (SPA) since 2017 (a combination of *EU- and location-specific* factors). The SPA has received little attention in this Study, because it is not generally known to the public. But the CETA has reinforced both the public and decision-makers' views that Canada and the EU remain above all things reliable trade partners. In other words, it has contributed to turning a diffuse sentiment – Canada and the EU have good trading and commercial relations – into a political reality.

Looking at *endogenous* factors, several experts and policy-makers have noted, both in the literature and during interviews, that the change of parliamentary majority that led to the election of Justin Trudeau's liberal government in late 2015, has acted as a driver of change (*location-specific* factor). While there is arguably some form of bipartisan consensus between conservatives and liberals on the importance of free-trade deals (including the CETA), which some interviewees also note, it can hardly be ignored that the various Trudeau Governments have pushed for a much more multilateralist international agenda than its predecessor – whether on climate action, seeking influence at the UN, defending the principles of gender-based foreign policies, and more, which in terms of perceptions has contributed to bringing the EU and Canada closer.

Another *endogenous* element that was already highlighted in the 2015 Study, but deserves to be repeated here, is that provincial divides continue to play a structuring role in how Canadians perceive the EU (*location-specific* factor). As a caveat, the public opinion survey does not allow for breaking down

responses by provinces. However, another ongoing study in the context of the EUPOP Canada project will look at precisely this feature, which will offer fresh and detailed data on the matter. During interviews with multipliers and influencers, several actors confirm that Canadians living in Central or Western provinces cannot be expected to experience the same sense of affinity with Europe that Canadians from Ontario, Québec or the Atlantic provinces. Some note however that they are surprised to see a growing interest for Europe on the part of the business community in Western Canada.

Finally, the Canadian traditional news media are also very much influenced by this decentralised nature of the Canadian federation. As explained by a journalist, the press in Canada very much has a provincial bias, and in general has much less interest in covering federal politics, let alone international politics. Given how difficult it is in general to report stories about the EU – a complex and distant political actor – this media feature certainly represents a barrier for a higher EU visibility and its perceived actorness in Canada.

1.2.6. Recommendations for EU public diplomacy

The last section of this country report translates the analysis of the main findings into a set of public diplomacy recommendations. In doing so, several observations should be taken into account. Firstly, a lot of EU public diplomacy challenges lie in its very nature. The EU is a complex political actor, and it can hardly be expected of the general Canadian public to understand much of what it is, how it works, its governance, competences, etc. As such, there will always be structural limits to the effectiveness of the EU's public diplomacy with the broader public. Secondly, the EU's public diplomacy effectiveness in Canada will also remain dependent on domestic and foreign policy dynamics that happen in the US – a regional hegemon. This is another element that is beyond the control of the EU and its representatives in Canada, and will continue to be in the future, given how interdependent Canada and the US are. And thirdly, the state of the EU's public diplomacy thinking in 2021 has been profoundly impacted by the COVID-19 pandemic, especially the new virtual dynamics that it has created. The rise of such virtual diplomacy will represent an opportunity for the EU in Canada in the future, given the size of the country and the traditional difficulties of reaching out beyond traditional stakeholders.

Looking at demographic trends, the median age in Canada was 41 years old in 2020, according to Statistics Canada. Canadian youth (aged 15-29), a particular focus of EU public diplomacy initiatives, accounted for 19.2% of the total population. Also noteworthy is that Canada remains a land of immigrants, with 21.5% of the total population being non-Canadian in 2020. This of course does not capture the important demographic contrasts that Canada features from one province to the next.

The following recommendations are structured by themes (politics, economy, etc.), short vs. long term views, and practice vs. policy nature of the recommendation. While some build on the Baseline Study's recommendations (e.g. diplomatic like-mindedness, importance of cultural diplomacy, focus on youth or research community), other are more recent and directly flow from the updated analysis conducted in 2021 (such as CETA-related initiatives or the focus on the media).

Theme: International politics

Like-mindedness in foreign policy strategies of both Canada and the EU is a cornerstone of their strategic relationship. This naturally informs recommendations in this area, mostly with a medium to long term view.

Policy aims:

The narrative of EU-Canada like-mindedness should continue to be fuelled through EU diplomatic actions.

Medium to long term:

- The joint Canada-EU multilateral ethos that has strengthened since 2015 has significantly contributed to shaping positive perceptions of the EU in Canada, and it should be preserved. Some policy stakeholders in Canada fear that the EU might be tempted to leave Canada on the sidelines, now that it can count on a more mindful US President and ally.

Short-term practice-oriented suggestions:

- **The EU should** not go back to treating Canada as an afterthought, as it has sometimes done in the past, but rather **continue to fuel the narrative of EU-Canada like-mindedness through its diplomatic actions**.
- One policy example stemming from interviews is the **role played by the Ottawa Group to discuss WTO reforms**, in which the EU should continue to be actively involved.

Who to involve: EU and Canadian diplomatic communities; EEAS; Global Affairs Canada.

Theme: Domestic politics

In an effort to move away from the public diplomacy focus on Ottawa and its policy core, recommendations on domestic politics suggest two avenues to foster a broader range of policy contacts.

Policy aims

Establish and facilitate regular channels of communications across political continuum (e.g. with leading figures of the opposition in Ottawa) and further engagement with provincial heads of governments and other leaders in the regions.

Medium to long term:

- Several interviewees have argued that political families – conservatives vs. liberals – matter when it comes to perceptions of the EU. Yet it seems that the Delegation of the EU to Canada has mostly been used to interacting with government officials only. As such, and to avoid experiencing shifts in attitudes towards the EU when parliamentary majorities (and governments) change, **it might be useful to develop more regular channels of communications with e.g. leaders of the opposition in Ottawa**.
- The 2015 analysis had emphasised that the nature of the Canadian federalism made it necessary to implement region-specific public diplomacy strategies. A lot has been done by the EU Delegation in that direction since then. However, there is still room for the EU to **engage in longer term networking strategies with Canadian Premiers** (heads of provincial governments)

Short-term practice-oriented suggestions:

- Inviting leaders of the opposition to relevant meetings or events is already a standard practice for many foreign services in Ottawa, and it could be implemented easily, at no cost. It would help a sense of continuity in the policy dialogues with domestic political leaders.
- EU representatives to Canada could attempt to reach out to **the Council of the Federation**. The Council of the Federation has organised several international missions of some of its Premiers in the past, especially to the US. **Supporting an international mission of Canadian Premiers to Europe** might be an interesting public diplomacy initiative to consider in the future, with strong media visibility potential.

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

Theme: Trade and economy

Recommendations in the area of economic affairs are prominently influenced by the context of the CETA's implementation, and the friction points or limitations that remain in the short or longer terms

Policy aims: Increase outreach to Canadian producers (particularly from meat industry and those opposing the CETA) and SMEs to promote/explain the benefits of the CETA in various forms.

Medium to long term:

- The 2021 analysis shows that there is in general a positive narrative around the benefits of the CETA for Canadian stakeholders, and for the broader public to some extent. However, negative perceptions of the CETA and its regulatory barriers in the agri-food sector, especially for the Canadian meat industry, are mentioned by some interviewees, including one that points to a frustrating lack of dialogue with EU counterparts on these issues.
- Several interviewees note that it is still very challenging for Canadian small and medium enterprises (SMEs) to gain awareness of the CETA and its potential benefits. Some interviewees have also suggested that **the EU should try to make better use of diaspora networks, trying to identify Canadian entrepreneurs of European ancestry that might serve as promoters of international trade and exports**. A 2021 report from the Canadian Trade Commissioner Services has demonstrated that businesses led by immigrants are more likely to export than the Canadian average.

Short-term practice-oriented suggestions:

- Renew the dialogue on food regulation and standards, which remains one of the few irritants of the CETA implementation.
- In the same way that the EU has engaged with Canadian stakeholders from the mining industry via its annual participation in the PDAC convention, **EU representatives in Canada may consider taking part in annual industry events such as the Canadian beef industry conference, or more generally engage with e.g. the Canadian roundtable for sustainable beef** (other food products might be relevant too, but interviewees specifically mentioned the beef industry).
- As an organisation that claims to represent close to 100,000 members, **the Canadian Federation of Independent Businesses (CFIB) might represent a relevant partner to develop 'CETA 101' training sessions directly to companies, or to CFIB-affiliated business counsellors, in order to raise awareness of the agreement's potential benefits for smaller companies**. Such sessions could be built with the support of EUCCAN and other EEN Canada members on the EU's side.

Who to involve: 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.

Theme: Social issues

Not usually acknowledged by the public as a core element of the CETA, enhanced civil society dialogue is a promising development found in the agreement, and a public diplomacy opportunity.

Policy aims: The EU and Canada should maximise the potential of enhanced civil society dialogue that is included in CETA provisions.

Medium to long term:

- The importance and relevance of people-to-people contacts has been raised on several occasions with interviewees during the research. One interviewee actually mentions that this is a unique

feature of the CETA and SPA, as compared to other bilateral cooperation agreements that Canada is a part of.

- Apart from the CETA's Civil Society Forum, which some interviewees claim remains unfortunately little known to many civil society organisations, civil society dialogue takes place via CETA domestic advisory groups in both Canada and the EU. This element of the CETA agreement is praised by two different interviewees from civil society (one working on labour rights, one on the environment) as a unique and positive feature, which is not to be found in more traditional trade agreements. Both interviewees welcome its existence but regret that various thematic working groups often fail to discuss issues jointly, which sometimes impede their ability to defend their position on transversal issues (for example the issue of gender and labour rights).

Short-term practice-oriented suggestions:

- Based on interviews conducted for the analysis, **further coordination between Canadian and EU domestic working groups could be encouraged via joint meetings and discussions, to further contribute to the enforcement of the CETA's sustainable trade chapter.**
- In addition, **a higher profile and media visibility of the CETA Civil Society Forum's meeting could be encouraged**, via e.g. **social media advertisement to register** for the Forum's meetings, and **publication of post-meeting press releases**, especially when the meeting covers issues that are dear to both Canadian and European public audiences (for example: gender rights).

Who to involve: European Commission; Global Affairs Canada; EU Delegation; Canadian civil society organisations; Canadian media.

Theme: Culture

A sense of cultural affinity felt by Canadians towards Europeans is a thread that runs through both the Baseline Study and the 2021 Update Study. This continues to be reflected in recommendations in this area.

Policy aims: More emphasis should be put on the cultural affinity that Canadians feel towards Europe through various simultaneous initiatives

Medium to long term:

- With regards to cultural diplomacy, one thing that appeared as surprising to this report's author is the lack of awareness of the EUNIC Canada – the Canadian chapter of the European Union National Institutes for Culture, i.e. the European network of organisations engaging in cultural relations. The EUNIC is co-funded by the EU's Creative Europe Programme. One assumption is that the lack of human resources makes it difficult for this European institute to effectively coordinate the relevant activities and programmes of European cultural institutes that have a branch in Canada.
- What is said in the preceding section about diasporas and the role of Canadians of European origin in business is also true in arts and culture. Many Canadians feel connected to Europe culturally, often due to a direct European personal or family background.

Short term practice-oriented suggestions:

- The EU Delegation to Canada should learn from other cultural projects by other Delegations implemented with(in) the EUNIC network. A recent partnership agreement between the EUNIC and the EEAS has been signed, which should help to foster greater cooperation with

EU Delegations. In this context, the EU Delegation to Canada could aim at **gathering best practices shared by EU Delegations where joint cultural relations projects and programmes have already been implemented with the EUNIC local chapters** (according to the EUNIC's website these are: Bolivia, Cuba, Democratic Republic of the Congo, Egypt, Jordan, Peru, Senegal, Sudan, Tunisia and Ukraine).

- **In the context of e.g. an EUPOP-funded project, there would be some room for an outreach campaign featuring Canadian artists of European origin** and how their artistic approach relates to their personal or family background in Europe. This would have to be envisioned in the current or future round of EUPOP funding.
- One could also imagine some **EU sponsorship and support of an exhibition with the Canadian Museum of Immigration in Halifax**, on the occasion of a future specific EU-Canada anniversary. This would also allow for additional public diplomacy outreach in the Atlantic provinces.
- One interviewee also suggests that the EU and relevant Member States should not hesitate to **make use of the Arctic Council as a vehicle for arts discussions and initiatives, especially when it comes to Canadian and European Arctic populations** (e.g. Inuit or Sami people) (CANCUL1).
- Canadian cultural institutions such as the **Canadian Council for the Arts** already hold significant ties to their counterparts in Scandinavia, because the latter have similar institutions (while countries like France, Germany or Italy do not). So, institutionalised discussion tables exist, also under the International Federation of Arts Councils and Culture Agencies, to address topics such as inclusion and diversity in the arts.

Who to involve: 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.

Theme: Education

Even though youth was already a focus of attention in 2015, it seems like this has only grown more important in 2021 in the minds of elites interviewed for the study. This is reflected in the below recommendations that addresses youth and education.

Policy aims: EU-funded education outreach programmes should be reoriented towards youth audiences less familiar with the EU

Medium to long term:

- Youth-focused initiatives already constitute an important part of the EU's public diplomacy in Canada, and their number has increased since the initial 2015 Study. As one interviewee puts it, investing in youth is where you can get the most impact; 'if you are young and gain an EU-related experience early in your life, then this lives on. You need to offer the possibility of creating connections'.
- When thinking about public diplomacy initiatives that focus on students in particular, the EU and its Delegation in Canada tend to team up with Jean Monnet actions, for example centres for European studies or Jean Monnet chairs, to set up events, projects or competitions. While this may sound natural, one limitation of such endeavours is that these initiatives often end up targeting audiences that are already sold to the European idea and/or knowledgeable about the EU – something which transpires in the focus group participants' views that many current EU

education projects are known by very few students. **It might instead make sense to continue and expand such projects targeting “regular” high school and undergraduate university students in EU-relevant social science disciplines** (including, but necessary limited to: human geography/climate/sustainability, smart solutions, media & communications, AI, gender studies).

Short-term policy-oriented suggestions:

- Resume/increase student exchange, particularly in light of the loss of human contact due to the pandemic.
- A new EU-funded project ‘**Creating the Next Generation of Transatlanticists: Education Outreach in the US & Canada**’ is being launched at the time of writing this report, with the aim of developing education engagement opportunities related to the EU. Unfortunately, and contrary to what the project’s title might indicate, the bulk of this project focuses on the US, not Canada, which may constitute a missed opportunity. But **similar undertakings, with a more central focus on Canada, should be encouraged.**
- One initiative that could serve as an interesting template is a Jean Monnet-funded project implemented by Carleton University, which **sends graduate students in EU studies programmes as guest speakers in Ontario high-schools, and which has also developed teaching material on the EU for high-school teachers.**
- **Members of the newly-developed Alumni network of EU-funded programmes could also constitute a relevant pool of experts/guest speakers to rely on.**

Who to involve: EU Delegation; European Commission; Canadian school boards; Canadian universities; EU Alumni Network.

Theme: Research, science and technology

Research, science and technology remain a very under-exploited theme in EU public diplomacy programmes in Canada, presumably because it reaches out to a relatively small community. However, this is one area where Canada and the EU have great potential to lead jointly by example.

Policy aims: Enhance and showcase with major visibility EU-Canada research exchange and innovation through institutional support and capacity-building for such exchanges, and specifically in shared-leadership projects to solve major societal issues

Medium to long term:

- Even though research and science are in the area where the EU is seen to be leading, almost none of the interviewees and focus group participants think it is a primary area of strategic cooperation between Canada and the EU. It has also not been the subject of particular public diplomacy initiatives, except for institutional, EU-funded Jean Monnet actions. However, there is a significant number of Canadian researchers and institutions that have participated in Horizon 2020 research projects.
- Science diplomacy will become even more relevant if Canada is to join the Horizon Europe research programme as an associate member – a possibility that is currently under negotiations. This might provide the necessary impetus to boost public diplomacy initiatives and provide them with greater visibility.

Short-term practice-oriented suggestions:

- **There is unfulfilled public diplomacy potential on that issue, and there would be room to showcase success stories of Canadian and European researchers working together to solve major societal issues related to health or climate change, for example. Supporting the outreach of such consortia to Canadian research, science and technology stakeholders could be undertaken with the support of Euraxess' North America chapter.**

Who to involve: EU Delegation; Horizon 2020 research consortia; Canadian universities; Euraxess North America.

Theme: Media

There is a risk that EU representatives in Canada misevaluate how knowledgeable Canadian journalists are about the EU. This last recommendation tries to tackle this ongoing challenge in the short term.

Policy aims: Raise the level of awareness and knowledge about the EU among Canadian opinion-formers in different media

Medium to long term:

- International news coverage tends to be weak in the Canadian media. It is often difficult to report on the EU in the news, because of how little the public, and often journalists themselves, know about it. One of the exceptions to this is *The Globe and Mail*, which reports quite consistently on EU affairs due to the presence of its permanent correspondent in Europe, Eric Reguly, based in Rome. He and Radio Canada permanent correspondents in Paris are probably the most influential sources of EU news on the side of the Canadian media, if specific individuals are to be involved in public diplomacy projects.

Practice-oriented suggestions:

- Since 2001, the EU Delegation to Canada has held an EU-Canada Young Journalist Fellowship competition, which helps to foster links between EU and Canadian press, and create greater awareness of the EU amongst the young professional media community in Canada. This is done via a study tour of EU institutions, and some media reporting that follows. While this is certainly a welcome and valuable initiative, one journalist interviewed for this study regrets that the production of a sample of work on the EU or Canada-EU relations is a prerequisite in the competition. He views this as evidence that EU officials often fail to understand how little knowledge there is about the EU in the Canadian media community.
- In addition to such fellowships, he argues in favour of EU-sponsored training sessions for young or more experienced journalists. **In a similar way that EUPOP Canada has offered training sessions about the EU and its policies to Canadian civil servants, one could envision 'EU-101' training that could be offered to Canadian media people**, including young professionals, but also open to students in communication and journalism, and social media influencers.
- The latter proposal could be set up in **coordination with the Canadian Association of Journalists (CAJ)**, to the extent that the Delegation of the EU to Canada already collaborates with this association in the framework of its Fellowship.
- Important for Québec-based journalists is that, for the vast majority, they are not affiliated with the CAJ, but rather with the *Fédération professionnelle des journalistes du Québec (FPJQ)*. This association should therefore also be included in such a public diplomacy project focused on the media, and so should less usual media stakeholders for the EU Delegation, such as provincial dailies or first nations media channels, e.g. the Aboriginal Peoples Television Network (APTN).

Who to involve: 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).

To conclude, this last recommendation should serve as a reminder that many EU public diplomacy initiatives in Canada will have no choice but to continue to confront the challenge of the Canadian linguistic divide between French and English. For reasons of time and resource constraints, EU institutions and actors in Canada have in the past most often developed their public diplomacy projects and programmes in English, and mostly communicated about them in English too. While the point is not to suggest that the province of Québec, for example, should necessarily be the focus of a particular public diplomacy effort, the language sensitivity should certainly be mainstreamed in public diplomacy thinking when specific target audiences (for example in the media or cultural sector) have a significant French-speaking component.

1.3. China

This Country Chapter presents a synthesis of the China-specific findings of traditional and social media analysis; interviews, focus groups and public opinion poll conducted in the framework of this study. The Chapter follows the logic of the research design of the study at hand. We present the main findings for China according to the research criteria applied – namely visibility, actorness and local resonance, and norm-setting. Moreover, in the section on actorness and local resonance, we discuss these according to the themes analysed in this study: economy and trade; political issues; development; social issues; environment; energy; science, research and technology; culture; education; health (new perspective). The final section before policy recommendations looks at the local conditions that explain the perception of the EU in China. We conclude the chapter with recommendations for the EU's public diplomacy in 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 about 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.

1.3.1. Sample

Public opinion

The online survey was coordinated and conducted by PPMI through an online panel provided by Syno International. The survey questionnaire was presented in simplified Chinese. Data collection took place from 28 April to 16 May 2021. The survey sample was representative by age, gender, and region. Respondent profiles in the China were established based on data from the World Bank World Development Indicators database⁷. The survey included a total of 1108 individuals aged from 15 to 64 years old⁸.

Media

The quantitative part evaluating the general trends in a large press media sample was carried by PPMI. Four popular prestigious dailies People's daily; Global Times; The Beijing News, China Youth Daily and one business daily China Business News were monitored from 1 February to 30 April, 2021. Factiva repository was used to aggregate content from both licensed and free sources, and in-house data processing was applied to produce the results. Due to Factiva limitations, the experts analysed Reference News outlet. It was not included in the automated Quantitative analysis dataset.

Two separate datasets in Chinese Simplified language were collected throughout the observation period – “EU” (892 articles) and “Europe” (1017 articles) in Chinese Simplified and Traditional languages. Search terms for the dataset “EU” are: “European Union”, “EU”, “European Commission”, “European Parliament”, “Court of Justice of the European Union”, “EU presidency”, “EU Council”, “European Council”, “Council of the European Union”, “Eurozone”, “European Central Bank”, “European Investment Bank”, “European Medicines Agency”. The search terms for the dataset “Europe” are “Europe”, “European”, and “Europeans”. The search terms for “EU” and “Europe” datasets consider both plural and singular forms and possible grammatical forms of the search terms in the local language. Europe dataset excludes articles containing any of the “EU” dataset keywords. The search terms for «EU» and «Europe» datasets considered both plural and singular forms as well as possible declensions in the different languages.

The qualitative media content analysis was designed, supervised, and coordinated by experts from the Public Diplomacy and Political Communication Forum (PD-PCF), University of Canterbury (UC), New Zealand, and conducted by local researchers trained by the PD-PCF. PPMI collected the media sample (52 articles) using the search engine from two prestigious newspapers, People's Daily and Global Times, for country experts for in-depth qualitative analysis. Experts generated the sample for Reference News (25 articles) following the respective rules. The exact time frame of observation remained the same. Experts analysed the EU image created by applying elements of content, cognitive and critical discourse analyses.

Social media

PPMI carried out the social media analysis. The data collection process was automated using the online social media monitoring tool Mediatoolkit.

⁷ World Bank World development indicators database: <https://databank.worldbank.org/source/world-development-indicators>

⁸ Detailed public opinion survey data are available in Annex II of this Report – Comparative public opinion survey report.

Social media posts were collected from Twitter, Facebook, and Instagram⁹ with the use of automated queries. Posts attribution was made based on posts location and language. To determine user's location, the Mediatoolkit searches for the specific location mentions in the post, or location information in user's profile. If such information was not available, the algorithm searched for other indicators in the text, such as mentions of country-specific locations. If none of the geographic indicators is found, the language of the post is used for the post attribution.

Social media posts were collected with the use of automated queries. Coverage of the EU in collected posts was traced using a set of the EU-related keywords:

"European Union", "EU", "European Commission", "European Parliament", "Court of Justice of the European Union", "CJEU", "EU presidency", "EU Council", "Council of the European Union", "European Council", "Eurozone", "European Central Bank", "European Investment Bank", "European Medicines Agency". All the keywords were additionally traced in one-word format to capture related hashtags: europeanunion, europeancomission, europeanparliament, courtofjusticeoftheeuropeanunion, eupresidency, eucouncil, europeancouncil, counciloftheeuropeanunion, europeancentralbank, europeaninvestmentbank, europeanmedicinesagency. Europe-specific keywords used for filtering relevant social media posts are "Europe" and "European". Europe dataset excludes posts containing any of the "EU" dataset keywords. Additionally, a location filter was used to ensure that the collected mentions originate from China. A language filter was set up to collect posts in English and Chinese.

Working with social media platforms, the Project Team followed each platform's terms of use. All identifiable information of individuals from social media data remains confidential and is removed before the publication of findings. Computational analyses of the samples involve only contents from media databases' public websites – posts that are available to general audiences. No generalised conclusions that might cause any potential harm to identifiable communities are drawn from social media analysis.

The resulting sample of China social media posts collected from 1 February to 30 April 2021 includes 44738 mentions, of which 22162 are of the EU (60% in Chinese) and 36309 of Europe (74% in Chinese).

Interviews and focus groups

Interviews with local opinion- and decision-makers as well as focus groups with students were conducted by the Country Experts, with training support and supervision from PD-PCF, UC, following the approval of the UC Human Ethics Committee. As part of this study, interviews and focus groups aim to provide in-depth explanations about Brazilian perceptions of Europe and the EU and cross-reference the findings from the public opinion survey, traditional and social media analyses.

Structured interviews were conducted individually with opinion-makers in China. This group included senior academics, journalists and researchers at think tanks¹⁰. Subjects were confronted with statements

⁹ The social media analysis for China is limited to international platforms. The available social media analysis tools do not allow for the retroactive extraction of data for the most popular Chinese social media platforms such as Weibo and WeChat required by the methodology of this study.

¹⁰ It should be noted that the majority of interviewees had above average knowledge of EU affairs, given their background as academic researchers, university professors or professionals. This means that their views about the EU – in comparison to Chinese elites more generally – are likely to be more favourable, given their superior understanding of the EU, its institutions, policies and objectives. However, in the context of a challenging domestic environment for the conduct of such qualitative research, such potential bias among the interview cohort was unavoidable. In the writing of this report, every effort has been made to provide a balanced and objective representation of Chinese attitudes to the EU by relying on a multitude of sources of information.

about the EU in order to determine their awareness of, and attitudes towards the EU, its institutions, policies and member states. All interviews were carried out in the English language and took place remotely, making use of online platforms such as Zoom, Skype and WeChat. In case of occasion connection problems, the interview was followed up by collecting responses to remaining questions in writing. The respondents demonstrated a good awareness of the EU, and their attitudes were largely positive, albeit dominated by an emphasis on recent crises, Brexit, and a mixed view on the EU's response to the COVID-19 pandemic.

The sample for the focus group consists of eight undergraduate students (divided in two groups, aged 20-23, 4 males and 4 females) from different universities in China, majoring in human resource management, pharmacology, information technology, civil engineering, economics, business, English, journalism, and international politics. The personal experience with the EU is limited among both groups. One student studied in the UK for a month on an exchange programme, another student worked as an intern in Germany. Some family members of the focus group participants study in the EU. The students' awareness more broadly remains limited and is mostly drawn from Chinese social media and Chinese news. In 2015, students were more personally exposed to the EU through tourism and exchange programmes.

1.3.2. Visibility

Comparing the terms, the EU is generally associated with, "modern" (46.5% in 2021 and 38.6% in 2015) and "multicultural" (42.4% in 2021 and 41.5% in 2015) stand out as dominant themes, yet even here, other countries rank above the EU. In both categories, perception of China itself is better than that of the EU (53.1% and 44.3%, respectively). The categories of "peaceful", "efficient" and "strong" follow in the association chain (with percentages in the 20s), contributing to its overwhelmingly positive image.

The 2021 results, however, indicate the deterioration of the EU image in the eyes of the Chinese public compared to the 2015 Baseline Study. Only two of the positive descriptors associated with the EU (modern and multicultural) have a higher share of respondents choosing them in 2021 compared to 2015. The share of respondents who associate most of the positive descriptors with the EU has decreased. The biggest decrease is in the share of respondents who believe the EU to be trustworthy – from 22.1% in 2015 to 10% in 2021. Chinese respondents in 2021 also believe the EU to be much less united compared to 2015 (14.2% compared to 24.1%).

Although negative connotations such as "hypocritical" (17.2%), "arrogant" (18.2%) and "aggressive" (11.1%) score relatively low, all of them demonstrate an increase in 2021 compared to 2015, with the highest increase for the "hypocritical" (from 6.9% in 2015).

It is also noticeable how negative perceptions are of the United States, which is seen by the Chinese public as the most "arrogant" and "hypocritical", and least "united" country or organisation. Perceptions of Russia are mixed, scoring highest of all countries as being "strong" (59.7%) but also as "aggressive" as the United States (24.3%) – only India (28.3%) receives a higher score. The overwhelming impression from this survey is the positive perception Chinese respondents have of their own country. With only a couple of exceptions, China is associated most of all with positive connotations and least of all with negative ones. All except one positive connotation for China have been chosen by more than half of the respondents, with "Peaceful" and "United" featuring most prominently (78.1% and 72.1%, respectively).

Concerning assessing the EU's activities across various fields, the Chinese public has a predominantly positive perception, with little differentiation between the multiple domains. Half and two-thirds of respondents have a "very good" or "fairly good" perception of EU activity in practically all areas. The "development of new technologies" (the highest evaluation - 68.7%), global trade, "science and

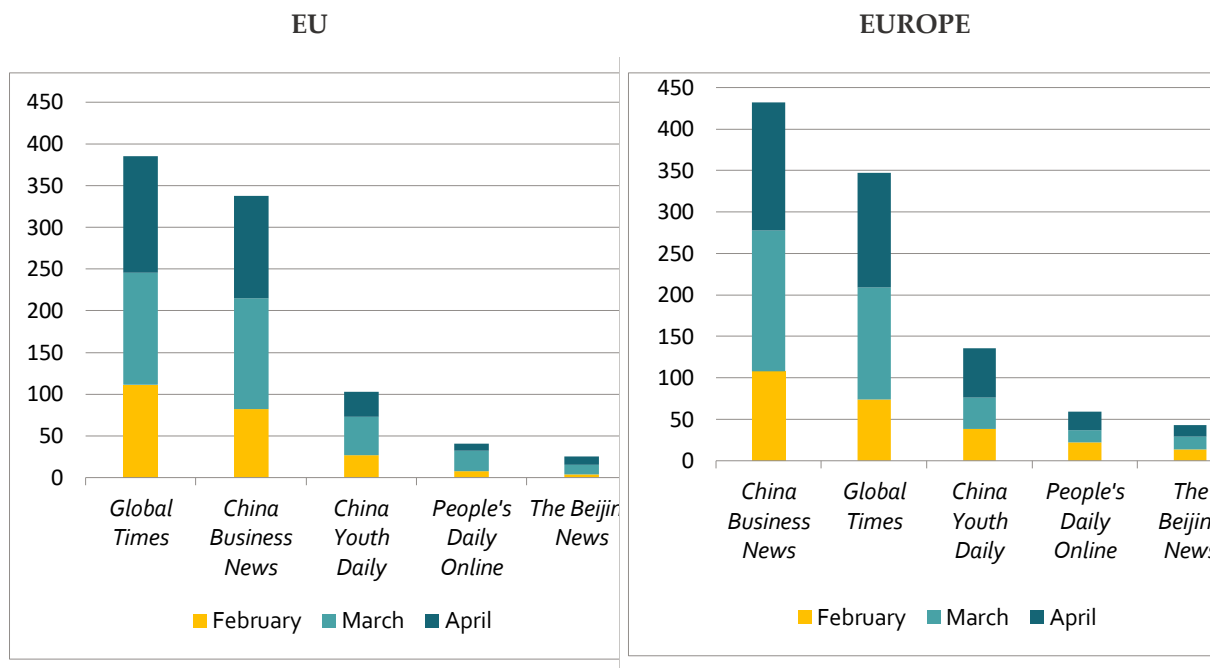
research” (both 67.2%), “high-quality food production” (67.1%), “financial and banking services”, and tourism (66.3% both) stand out as areas where the EU is perceived by 66% or more to be doing very or somewhat well. The entertainment industry and space exploration are seen as the weakest areas of EU performance (57.4%, 54.9%, respectively). Neutral views are persistently in the range between 19% and 29.1%. Responses for “fairly bad” and “very bad” views of EU activity are in the single digits across the board of policy areas. The same is true, albeit at a slightly higher level, for the responses indicating a lack of knowledge of EU activity in the various areas. Noticeably green technologies and sustainability are among the domains of which the most significant share of respondents (9.6%) could not provide an opinion of EU performance.

Compared to 2015 in 2021, Chinese public opinion of the EU’s performance in most economic and cultural activity domains has deteriorated. On average, the share of respondents who believe the EU to be “very good” or “rather good” has decreased by 8.9%. The highest drop in positive evaluations is noted in tourism (from 78.4% to 66.3%), global trade (from 79% to 67.2%), green technologies and sustainability (from 75.9% to 64.4%), medical research (from 76.1% to 65.3%), and science and research (from 77.5% to 67.2%). There is also an increase in the share of respondents who think that EU performance is neither good nor bad, the biggest difference being in medical research (9.8%), global trade, high-quality food industry (8.7% both), science and research (8.3%) and industrial development (7.7%).

Chinese public demonstrates a high level of consideration of the EU: only 4% of respondents profess to “never” hear about the EU in the media, while 25.5% comes across the EU “more or less every day”, 35% once per week, and almost three-quarters in total hear about the EU in the media “at least once a month”. Exposure of Chinese respondents to the news about the EU has decreased in 2021 compared to 2015, when 30.1% of respondents declared hearing of the EU more or less every day, and 43.1% - about once per week.

Overall, media coverage of «Europe» was slightly higher at 56.7% of all the press articles reporting on the EU or Europe throughout the period than the «EU» and its’ institutions at 43.3%. «EU» had lower coverage in February (26%) than in March (39.1%) or April (34.9%). Press coverage for «Europe» was lower in February too (25.2%) than in March (36.7%) or April (38.2%).

FIGURE 19. VOLUME OF NEWS ITEMS WITH A REFERENCE TO THE EU AND EUROPE IN TRADITIONAL MEDIA. CHINA



Note: based on automated quantitative data analysis. Includes press articles which report on the EU and Europe as a principal or secondary subject of the article.

The degree of major centrality for EU articles was low for all traditional media outlets. Overall, a low degree of centrality in quantitative analysis shows that the EU and its institutions were not profiled as the main actors in the news story. In this regard, the 2021 Update Study also records a decrease from 25% of articles presenting the EU as a major subject in 2015 to 14% in 2021.

In reporting about the EU, Chinese outlets, the emphasis is on economic issues and on trade relations in particular. In the period under investigation (February to April 2021), news regarding the EU was dominated by the pandemic's handling and the conclusion of the trade agreement with the UK. The tone of the coverage was largely neutral, but with a negative focus on internal disagreements among member states, the EU's difficult relations with Russia, and the EU's "interference" and "moral arrogance" when criticising developments in Xinjiang and Hong Kong. More positive reporting occurs with regard to the promise of improving trade after the pandemic and the expectation of cooperation in relation to climate action and collaboration in science and technology. Compared to the Baseline Study, the theme of health replaced the culture as the third most discussed theme in relation to the EU in Chinese media (following economy and politics). Nevertheless, in 2021 the theme of culture retains high visibility and social energy, SRT. The number of materials in each of these themes is in a range between 500 and 600.

Similar to media, Europe visibility in social media was higher than that of the EU. The peak on 23 March was generated by posts about the EU's sanctions against China.

Member States and MSs' leaders' visibility, EU institutions and EU leaders' visibility

In both "EU" and "Europe" datasets among the EU institutions, the European Medicines Agency is mentioned the most – 64 times – in Chinese media. The media pay slightly less attention to European Parliament (55), European Council (26), European Commission (5), European Central Bank (4),

European Investment Bank (3). In addition, EU officials such as European Council President Charles Michel, European Commission President Ursula von der Leyen, ECB President Christine Lagarde and High Representative Josep Borrell are mentioned in the relevant contexts of their work. At the same time, national leaders, in particular, Angela Merkel and Emanuel Macron, have a generally higher profile. Other EU institutions were not mentioned in the media articles.

In 2015 European Central Bank was the EU institution most mentioned by the press in China (followed by the European Commission and the EU Council). European Commission President Jean-Claude Juncker was the EU official most often mentioned by the media. The chancellor of Germany, Angela Merkel and prime minister of Greece Alexis Tsipras were the two most often mentioned leaders of the EU Member States. The most mentioned Member States in traditional media are Germany, France and Italy. With the UK leaving the EU, Italy is the third most mentioned EU Member State, having replaced the UK. Several countries are mentioned more often in «EU» news compared to other countries – Austria (70%), Poland (65%), Belgium (63%), Greece (62%), Spain (60%).

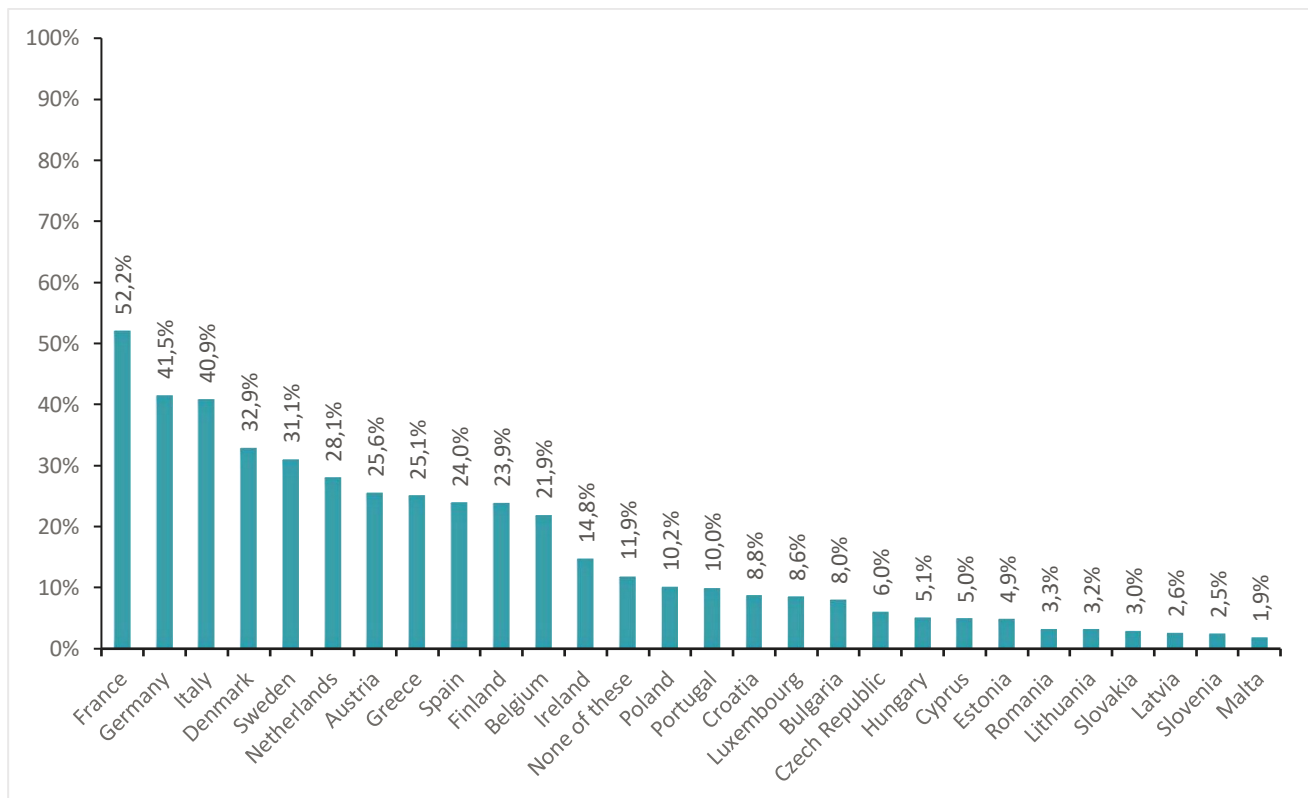
Each Member State is mentioned within the corpus of Chinese *social media* posts. Germany (756), France (597), Italy (390), Spain (244), and Hungary (235) were the most mentioned Member States.

Among the EU institutions, the European Medicines Agency gets 57 mentions in Chinese *social media* and almost half as many mentions were received by the European Parliament (21). European Central Bank (2) and the European Investment Bank (1) were also mentioned.

Awareness of particular institutions was minimal among youths participating in the focus group discussions. At the same time, some (though not all) opinion-makers had a more differentiated understanding of the distinct roles of Commission, Council and Parliament. The one area where young people – students – has better knowledge was education, with reference being made to the EU's ERASMUS programme. In addition, the EU was seen as leading on climate change.

The most attractive EU Member States are France, Germany and Italy. Compared to 2015 Italy has replaced the UK in the top three most attractive EU MSs, with France and Germany holding to their top positions.

FIGURE 20. ATTRACTIVENESS OF THE INDIVIDUAL EU MEMBER STATES. CHINA



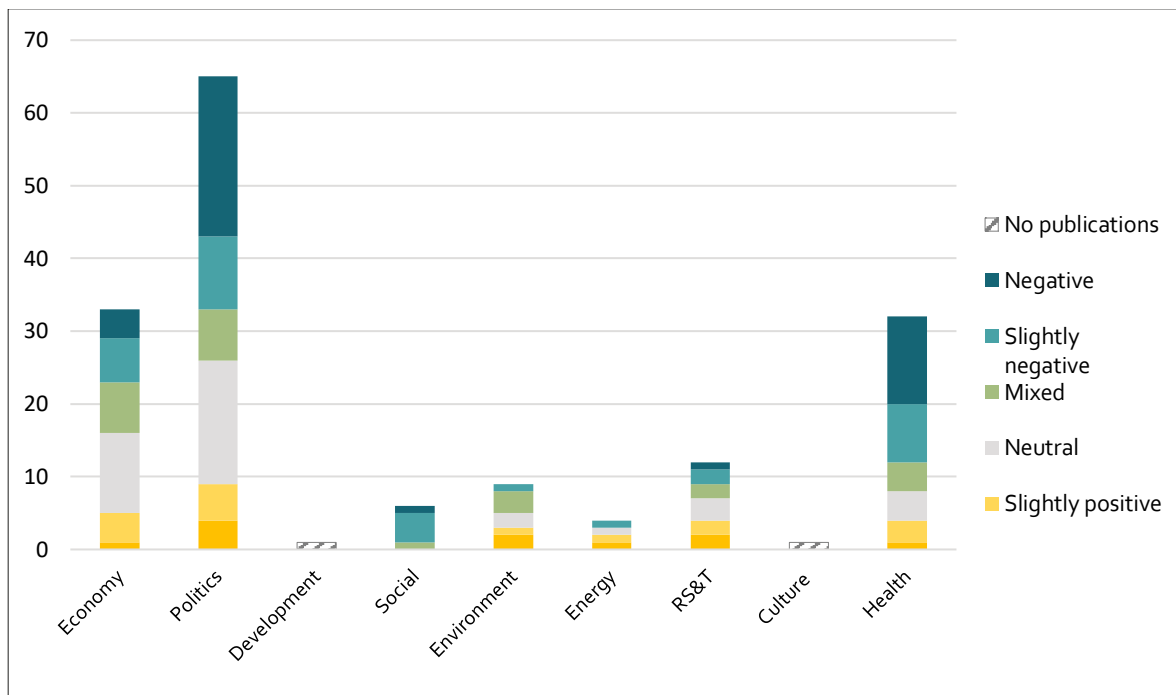
Note: based on Q25: Please indicate which European countries look the most attractive to you? Respondents could choose more than one country (n=1108)

Emotive charge

According to qualitative media analysis, the themes of politics, economy and health have the highest share of articles that present the EU in a negative tone (almost half of the articles in these themes have a slightly negative or negative emotive charge). Media coverage of the EU tends to have negative emotive charge when dealing with the handling of the pandemic, the initial difficulties in the roll-out of vaccines, and EU-China relations where the EU is seen to demonstrate double standards.

In social media, the emotive charge of the EU-related posts in the English language is rather negative (45.1%), followed by positive (30.9%) and neutral (23.9%) sentiment. The top three most visible themes in Chinese social media are politics (44% of all the EU related posts), economy and health (21% of all the EU related posts for each). The health theme raises the most negative sentiment (50% of posts in this theme are negative).

FIGURE 21. EMOTIVE CHARGE IN PRESS ARTICLES REPORTING ON THE EU AS A PRINCIPAL SUBJECT. CHINA



Note: Based on qualitative media analysis conducted by country experts. One article can reflect more than one theme.

In the sample of English-language social media posts, the emotive charge is overwhelmingly neutral.

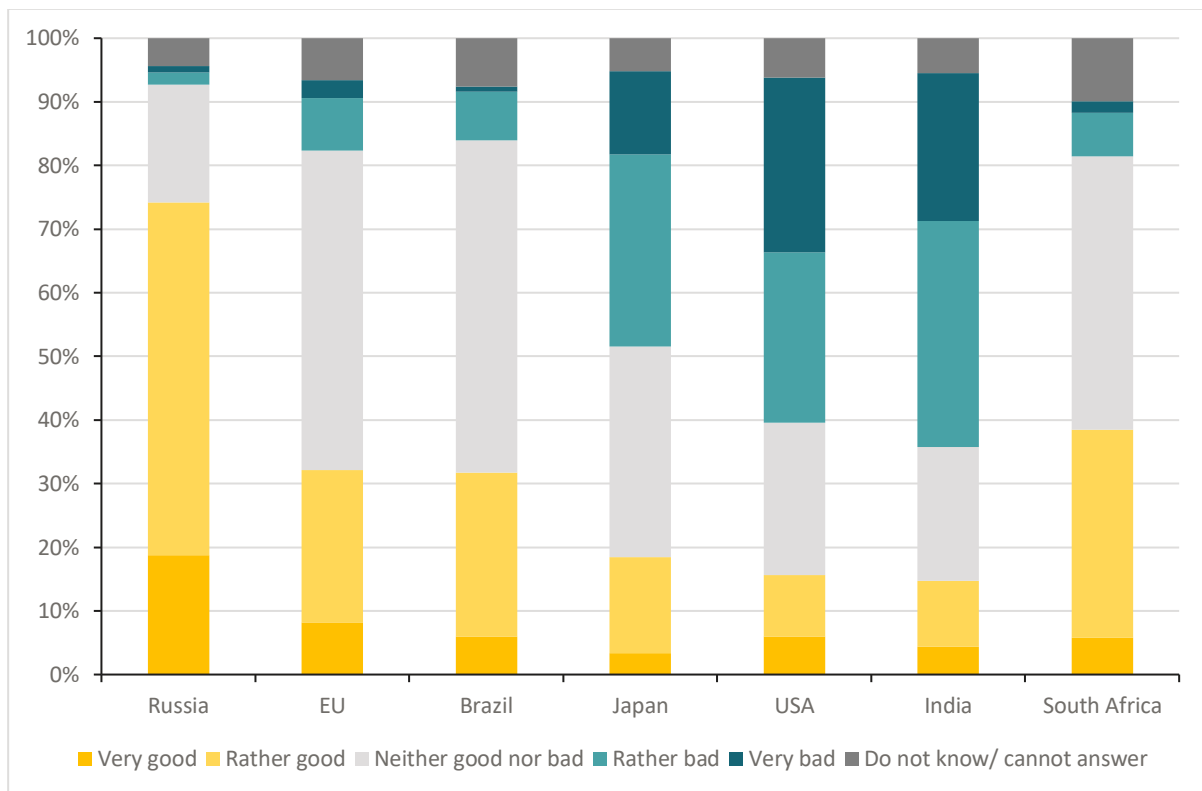
In the articles presenting the EU as a principal subject, politics, economy, and health are the most covered themes. The health theme features the highest share of the articles written negatively (62%). The percentage of negatively charged particles in politics term is 49%. In the economy theme, 50% of materials portray the EU positively or negatively. Notably, although the social theme is not very visible in the set of articles that present the EU as a principal subject, all the articles in this theme portray the EU in a mixed or negative tone.

Continuity and change behind visibility and emotive charge

The findings from the research conducted in 2021 generally confirm the observations of the 2015 report. The visibility of the EU in Chinese media, and public perception more widely, is somewhat limited. Adverse reporting tends to prevail, be it internal developments in the EU or “hostile” policies towards China. While trade, investment and environmental protection tend to be sources of more positive images of the EU, the response to the global pandemic, involving internal disagreements and unfavourable comparisons with China’s reaction and vaccine diplomacy, has reinforced earlier perceptions of a European Union in crisis and decline.

1.3.3. Actorness and local resonance

The EU as a partner

FIGURE 22. GENERAL EVALUATION OF CHINA RELATIONSHIP WITH THE EU AND OTHER COUNTRIES

Note: based on Q3: Which of the following words best describes your country's overall relationship with each of the following countries and organisations? (n=1108)

Compared to 2015 in 2021, Chinese respondents' views of their country's relations with the EU have somewhat deteriorated. In 2015 the most significant share of respondents (48.2%) saw China's relations with the EU as relatively good, 37.5% as neither good nor bad, and 8.8% as very good. In 2021 the share of respondents who see the bilateral relations as neither good nor bad has increased to 50.2%, and the share of respondents who regard the relations as rather good has decreased to 23.9%. In 2015 only 3.3% of respondents saw bilateral relations as rather bad or very bad; in 2021, this share increased to 11.1%.

In 2021 almost 70% of respondents strongly or "somewhat" agree that the EU is an important partner of China in international affairs (a decrease from 81.1% in 2015), and a similar share of the population would like to see stronger relations in the future (a decrease from 83.4% in 2015). In the same vein, more than 60% (strongly) agree that this is the case also for educational exchange (decrease from 79.8% in 2015). The EU scores somewhat lower on trustworthiness, which only 45% "strongly" or "somewhat" associate with the EU, while almost 38% neither agree nor disagree on this (in 2015, 69.3% of Chinese respondents saw the EU as a trustworthy partner to their country, and 25.9% declared they neither agreed nor disagreed with this proposition). The share of respondents who profess not to know is fairly low, around 6% for all questions in this complex, presumably reflecting the more general lack of knowledge that respondents have of the EU.

Elite interviews and focus group discussions demonstrate that the EU is generally seen as a potential partner of China, especially in areas such as trade, economic cooperation more generally and combatting climate change. In particular, in comparison to the United States and India, views in China about relations with Europe are favourable. Yet, these views are also tinged by negative observations

about internal disagreements within the EU and Europe’s “interference” in China’s domestic affairs. Young people in China recognise the EU’s agenda on sustainability and the value of student exchanges.

In the news coverage of the EU, stories with a ‘local hook’ strongly dominate, continuing a trend already identified in 2015. Chinese outlets are much more likely to report on the EU if a link to China can be identified, be it (usually negatively) about domestic developments in China or (more likely positively) when it comes to the involvement of China and the EU in international politics or their relations with one another (such as on the Comprehensive Agreement on Investments (CAI)).

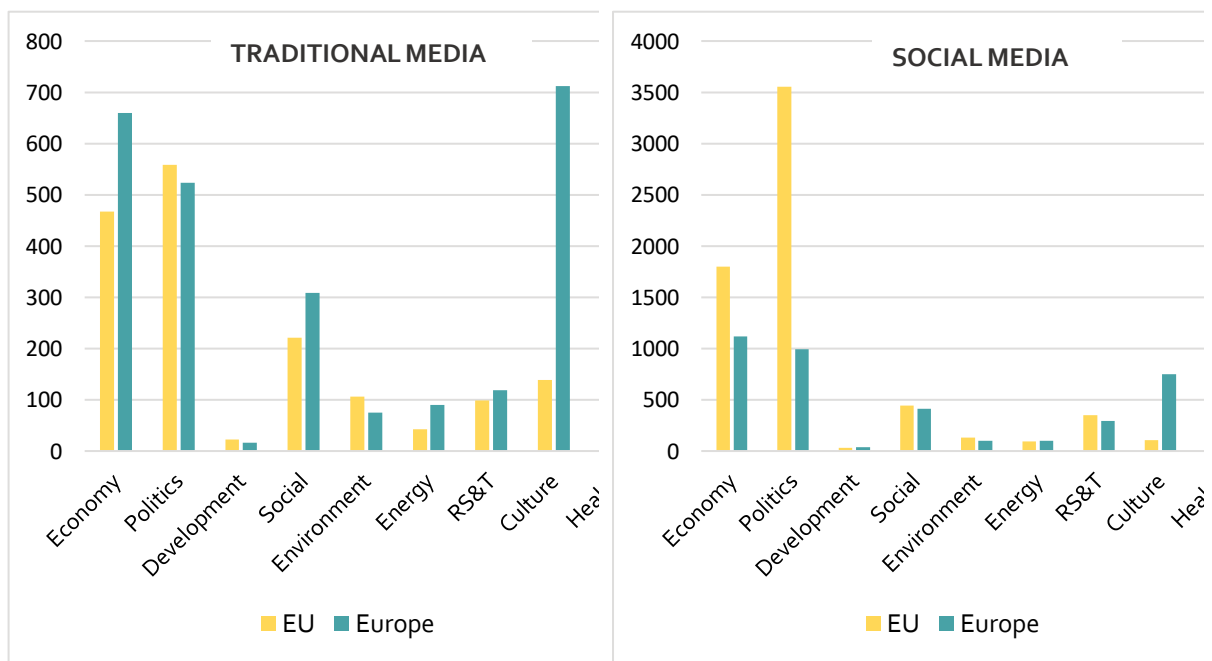
The print media under investigation in this study used a variety of sources. While People’s Daily mainly relied on domestic news agencies, Global Times and Reference News frequently sourced their articles internationally. The most used international sources are AFP, FT, Bloomberg, Reuters, as well as German, French and Russian sources (Die Welt, Deutsche Welle, Handelsblatt, Sputnik, etc.). This pattern is similar to the one discovered in the 2015 Study.

In observed Chinese media, the «EU» is most often mentioned regarding economy (16%), political (16%) and health (13%) thematic frames. For «Europe», the economy theme has the highest coverage of 17%. Politics, science, health themes were less present with 13-14 % coverage. In both datasets, development (4-7%) and environment (4-5%) themes are the less covered.

In (February-April 2021), much attention was devoted to the COVID-19 vaccine roll-out, with negative attention devoted to internal dissent within the EU and the discussion of export bans, while deliveries of Chinese vaccines to individual European states was reported positively. The imposition of EU sanctions in response to developments in Xinjiang, leading to Chinese counter-sanctions, and the impact of this dispute on the ratification of the CAI took place during this period as well.

In Chinese social media posts, the EU is most often mentioned regarding political issues (43.3%). A considerable share of posts contained economic (21.8%) and health (20.8%) thematic frames. Compared to the EU, Europe was much more often mentioned in connection with culture (14.6%).

FIGURE 23. THEMATICAL FOCUS OF SOCIAL MEDIA AND PRESS ARTICLES REPORTING ON EU AND EUROPE. CHINA



Note: based on automated quantitative data analysis. Includes press articles which report on the EU and Europe as a principal or secondary subject of the article.

Economy and trade

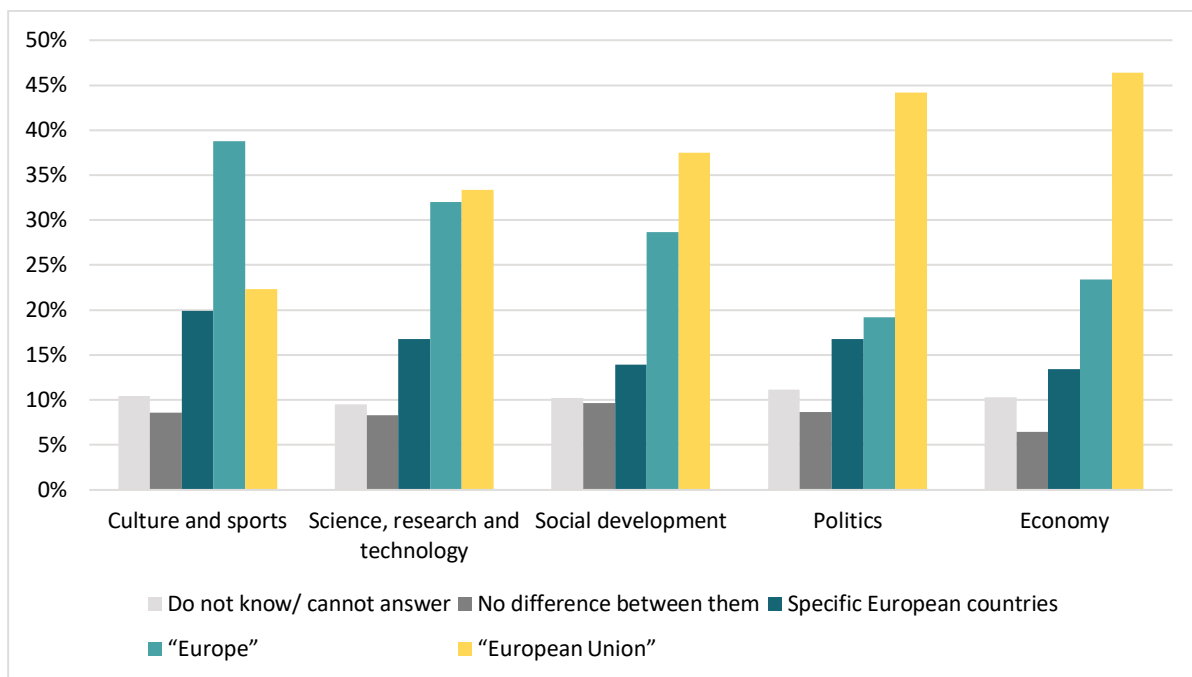
The economy remains the dominant theme in perceptions of the EU in China, something that is reflected across the board in media analysis, public opinion survey, focus group discussions and elite interviews. For 46.4% of Chinese respondents, the economy is associated with the EU (compared to 23.4% with Europe). While economic developments in Europe are viewed increasingly sceptically, with the EU seen as falling behind China and not being very united, its economic ties with China are regarded favourably. There are positive expectations that trade will increase to mutual benefit once the restrictions imposed by the pandemic end, and the Comprehensive Agreement on Investment is seen as a vehicle for closer cooperation in the future.

Public opinion views the EU's trade relations with China as positive, with 75.9% agreeing or strongly agreeing that the EU is an important trade partner of China and that economic ties should be further strengthened (74%). This represents a notable decrease since 2015 when 84.6% of respondents saw the EU as an important trade partner and thought the bilateral relations should strengthen. Sixty-four per cent of the respondents agree or strongly agree that the EU is an important partner in terms of science, research and technology (a decrease from 77.2% in 2015, which also corresponds with a somewhat lower opinion of Chinese respondents about the EU performance in this sphere overall). Still positive, but somewhat less so, are views about the EU as an investor (58.6%, a decrease from 69.2% in 2015) and as an important source of agricultural products (55.2% in 2015), where 26% and 30%, respectively, remain neutral (a slight increase from 23% and 28.3% in 2015). More than a third of the public 37% (with 39.7% stating they neither agree nor disagree with this statement) concurs with the view that the EU is protectionist, while just under a quarter either (strongly) disagrees or has no opinion. This presented an improvement compared to 2015 when 54% of respondents agreed that the EU is a protectionist entity, and 35% neither agreed nor disagreed with this statement.

In the public opinion poll, "don't knows" on these economic issues range between 5-10%, again reflecting the usual share of the population that lacks awareness of the nature of the EU.

Economy is the third (after politics and health) most visible theme in Chinese press coverage of the EU. One third (30%) the articles that present the EU as a principal subject portray the EU in a negative tone (compared to 50% in health and 60% in politics thematic frames). Nevertheless, some focus group participants envisage that China and the EU can become rivals rather than partners in the future.

FIGURE 24. ASSOCIATION OF DIFFERENT AREAS TO THE EU VERSUS EUROPE. CHINA

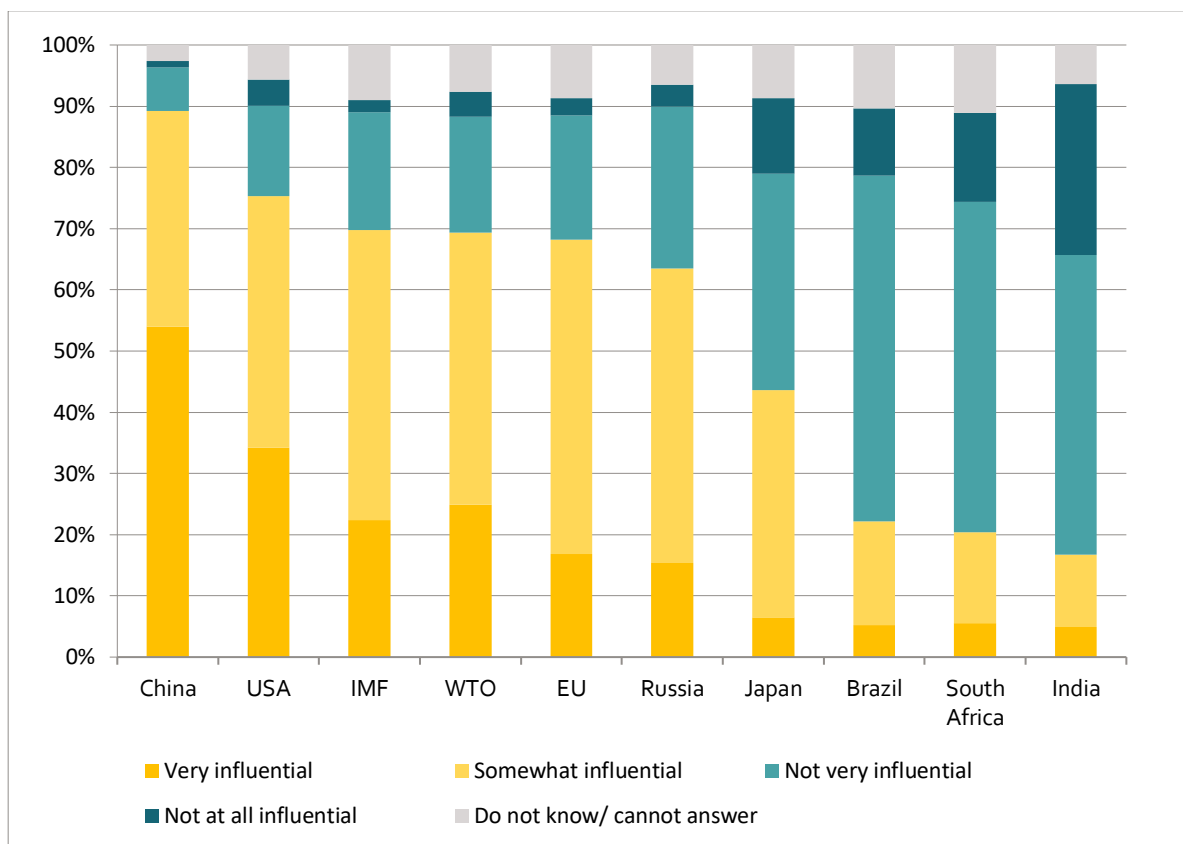


Note: based on the answers to Q22: Some people think about Europe, whereas others think about the European Union when talking about economy, politics, culture, sports and other areas. In your case, which term – Europe or the European Union - comes to your mind first when you think about the following subjects? (n=1108)

**Please note that in 2015, this question was accompanied by a chart in a different format under the section “Research, science and technology”. The wording and answer categories used in this question have changed in 2021, making it inappropriate to conduct historical comparisons.*

Although the EU is considered to be one of the key global economic actors, the Chinese public perception of the EU influence in the global economic affairs has dropped considerably in 2021 compared to 2015. Sixty-eight percent of Chinese respondents believe the EU to be very influential or somewhat influential in the global economic affairs compared to 85.1% in 2015.

FIGURE 25. EU INFLUENCE IN GLOBAL ECONOMIC AFFAIRS COMPARED WITH COUNTRIES AND INTERNATIONAL ORGANISATIONS.CHINA



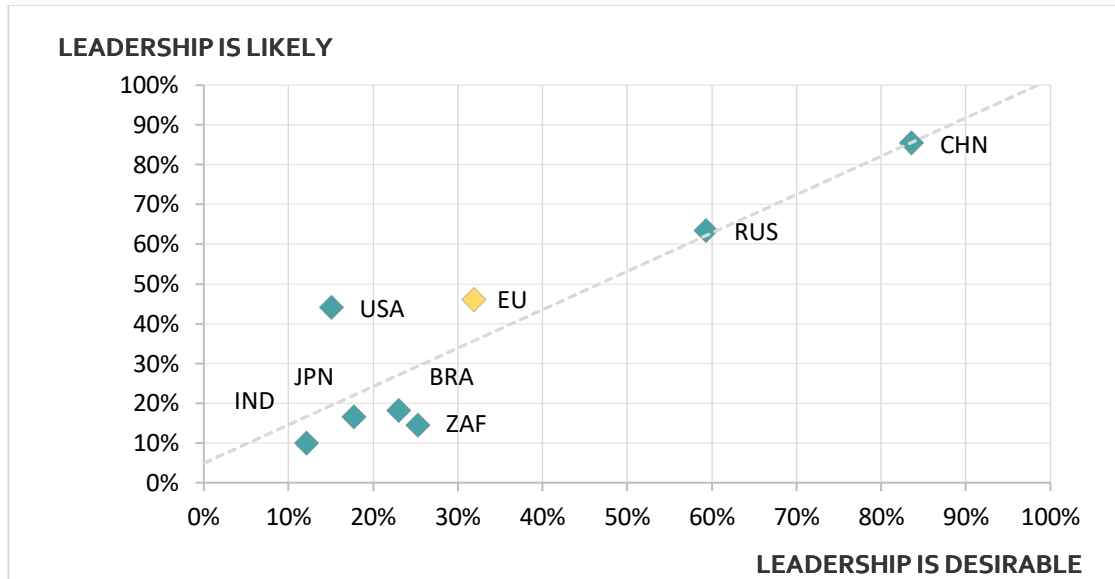
Note: based on the answers to the survey Q6: In your view, how influential, if at all, in global economic affairs are the following countries and organisations? (n=1108)

Politics

Views on the EU’s political role are mixed in China. While there is generally a favourable public view on the EU as a factor of peace and stability, with more than 70% of respondents considering the EU’s contribution in this regard as important or very important (a drop from 84.8% in 2015). The EU position is still – below China (over 90%), Russia (79%) and the UN (76%), although above the United States and NATO.

Media analysis, focus groups and interviews paint a more complex picture. Attitudes to Europe are heavily tinged according to the alignment (or not) of EU policies with Chinese interests. The role of the EU in only two spheres was appreciated by more than 50% of the Chinese public - Fight against climate change and protection of the environment (55.9% see it as very good or fairly good) and support for regional and international cooperation (52.9%). The lowest opinion was of the EU performance in military operations (32.8%) (a drop from 53.3% in 2015). In that regard, the EU’s views are negative when it comes to its human rights advocacy and its critique of China, but positive when opportunities for greater cooperation between the two sides are being identified.

FIGURE 26. DESIRABILITY VS. LIKELIHOOD OF EU GLOBAL LEADERSHIP COMPARED TO OTHER ACTORS. CHINA



Note: based on Q4: How desirable is that each of the following countries and organisations take a strong leadership role in world affairs? And Q5: how likely or unlikely is it that each of the following countries and organisations will take a strong leadership role in world affairs five years from now? (n=1108) The horizontal axis presents the sum of “Very desirable” and “Somewhat desirable” responses to the Q4. The vertical access presents the sum of “Very likely” and “Rather likely” responses to Q5.

EU performance in particular fields is also generally viewed favourably. Negative views remain below 15% across the board of policy areas, except for military operations and the fight against terrorism, where closer to 20% view the EU’s role as “fairly bad” or “very bad”. Most positive perceptions are being held with regard to the EU’s “support for regional and international cooperation”, and the “fight against climate change”, for both of which the share of fairly or very good views of the EU’s role exceeds 50%. Other areas such as “foreign policy”, support for developing countries, “dealing with refugees”, and “peacekeeping operations” all have between 40-50% of respondents viewing the EU’s role as “very good” or “fairly good”.

Remarkably, in the general context of EU-China relations, only a small minority – around 12% - holds negative views of the EU’s role in the areas of “justice and the rule of law” and of “media freedom”. “Don’t know” range between 8-14% of respondents, indicating that this share of the public has little knowledge of EU activities in the political realm.

Chinese respondents overwhelmingly see their country as the most desirable (83.6%) and likely (85.4%) global leader, with Russia following it with a big gap. Russia’s global leadership is seen as desirable by 59.3% (31.9% for the EU, 15.1% for the US) of respondents and likely by 63.4% (46.2% for the EU, and 44% for the US). The public in China believes it to be stronger, more peaceful, more united, more trustworthy, and stronger than Russia (China’s global “second best”), the EU and the US.

While almost half of the respondents consider EU global leadership in five years as likely or very likely, only about a third considers this (very) desirable. It does not imply opposition to the EU’s role as a global leader, though – just over 10% of respondents consider this (very) desirable. Instead, there is a high degree of indifference. Almost half of the public is neither in favour nor against a leadership role for the EU, putting the EU in the same bracket as emerging powers such as South Africa and Brazil.

Climate and environment

With regard to environmental policy, Chinese perceptions are on the whole favourable towards the EU, recognising the potential EU contribution to climate action in particular. This view is echoed both in the discussions with young people and in interviews with elites. Traditional media also sees the EU's focus on fighting climate change positively, providing an opportunity for cooperation between the EU and China and portraying the EU climate policies in positive or neutral tone. Chinese public (93.1%) believe China to be more important actor in fighting climate change globally, than the EU (73.4 a drop from 85.9% in 2015).

Energy

Energy, to the extent to which it is distinct from environment or economic policy, is not very visible in Chinese attitudes towards Europe and/or the EU.

Research, science and technology

Almost equal shares of Chinese respondents associate SRT with the EU (33.4%) and Europe (32%), and 16.8% with specific European countries. In terms of science and technology, Europe is seen among the global leaders, outperforming Japan but trailing behind China the US and Russia. More than a third (33.7%, decrease from 43.3% in 2015) of respondents consider the EU to be "very important" and 44.7% "somewhat important" (equals with 2015 data) when it comes to technological innovation (78% in total). Ninety-two per cent of Chinese respondents believe the country to be "very important" or "somewhat important" sphere (79.5% for the US and 84.3% for Russia).

In experts interviews the perception emerges, however, that Europe is relatively falling behind other global powers. Chinese press reports on RST in the EU in a balanced manner, however the volume of publications in this thematic frame (7% of total number of articles presenting the EU as a principal actor) also points to the fact that the EU is not considered as the most important actor in RST sphere.

Development and assistance

There is a recognition among the Chinese public that the EU has an important role in supporting developing countries. Views here are highly skewed (even more so than in other respects) that China is the leading country in this regard (more than 94% of the respondents attribute a very important or somewhat important role to China). The EU falls here into a secondary category, together with the World Bank, the UN and Russia, receiving between 70-82% scores on the counts. The United States and ASEAN follow somewhat behind, with around 60% of respondents identifying them as very or somewhat important. This view is also reflected by the discussion in the focus groups, where many participants ranked development aid provision among the top two or three issues of relevance associated with the EU (after "economy" and "politics"). This generally positive view of the EU's development policy must be seen in the context of little awareness about the details of what EU programmes in this area are about (some 10% of respondents also "don't know" about EU support for developing countries – lower than the score for the US, Russia, the UN, the World Bank and – of course – China itself).

Social

While the public opinion survey generally delivers positive responses about social development in Europe, discussions in focus groups and opinion-makers demonstrated a widespread lack of awareness of what social policy in the EU involves. There is a view that, on balance, the EU has a positive performance with regard to employment opportunities, social justice and gender equality, with more neutral views on minority and refugee protection, reduction of income equality and poverty

eradication. Some interviewees also mention the European welfare state as a model that China can learn from.

In the first half of 2021, much of the discussion about social issues in the EU was related to public health and the impact of the COVID-19 pandemic, making a systematic comparison with 2015 difficult. More critical views are expressed in the media and in focus group discussions about the EU's ability to handle the public health crisis, the negative economic and social impact of mitigation measures, competition for vaccine deliveries among member states. A group of media publications revolves around issues specific to Europe, with several articles on France and the strengthening of the populist right, as well as some focus on broader thematic issues like include the gender pay gap and LGBTQ+ rights.

The most appreciated aspects of the EU social system in the eyes of the Chinese public are overall quality of life (73.9% see it as very good or fairly good, a drop from 81.7% in 2015) and level of education (74%, a drop from 82.3% in 2015).

Culture

Perceptions of European culture are overwhelmingly positive in China. In the survey, almost two-thirds of respondents (64%) consider the culture and lifestyle in the EU very or somewhat attractive – the highest of all possible choices (although almost similar to Russia with 63.4%) after China itself (90.5%). However, it is important to observe that culture is predominantly associated with “Europe” rather than with the “European Union”. Significantly more significant share of Chinese respondents (38.8% compared to 22.3%) associate culture with Europe rather than the EU, and a substantial share of respondents (19.9%) associated it with specific European countries.

The positive image of European culture still holds across all aspects of European culture, with museums, arts and architecture receiving the most positive mentions. Elites have a similarly positive view of European culture, somewhat in contrast to negative views about the EU being mired in political and economic crises.

Health

Chinese views on EU health policy are primarily overlaid with perceptions of the handling of the pandemic – which are generally negative. Media analysis has demonstrated the adverse reporting of the EU's crisis response. The majority of articles in the media sample centre around the COVID 19 crisis and can be categorised around the following themes: a) the EU's troubled vaccination rollout; b) the EU's global vaccination commitments, especially towards the Global South; and c) the crisis of confidence with the AstraZeneca vaccine. This image is also reflected in the response by youth and elites.

The high rates of infection in European states, the perception of a disjointed EU in the initial stages of the health crisis, border closures, the initially slow vaccine roll-out and internal discontent about lockdowns and other mitigation measures all combine to create an image of the EU not having managed the health crisis well. This is seen in conjunction with similar observations about the United States and contrast to the perception of an effective response in China and other Asian countries. Some participants in the elite interviews commented favourably on the EU's capacity to emerge strengthened from previous crises (e.g. Eurozone, Brexit), leading to a perception that the EU will also ultimately succeed in overcoming the pandemic and develop a more robust health policy as a result of it.

1.3.4. The EU as a norm-setter

The EU is recognised as a norm-setter among Chinese observers, albeit not as a dominant one. The survey ranks high in a leading group of countries that also includes China, Russia, and the UN. Almost 80 per cent of respondents consider the EU as being very or somewhat important when it comes to

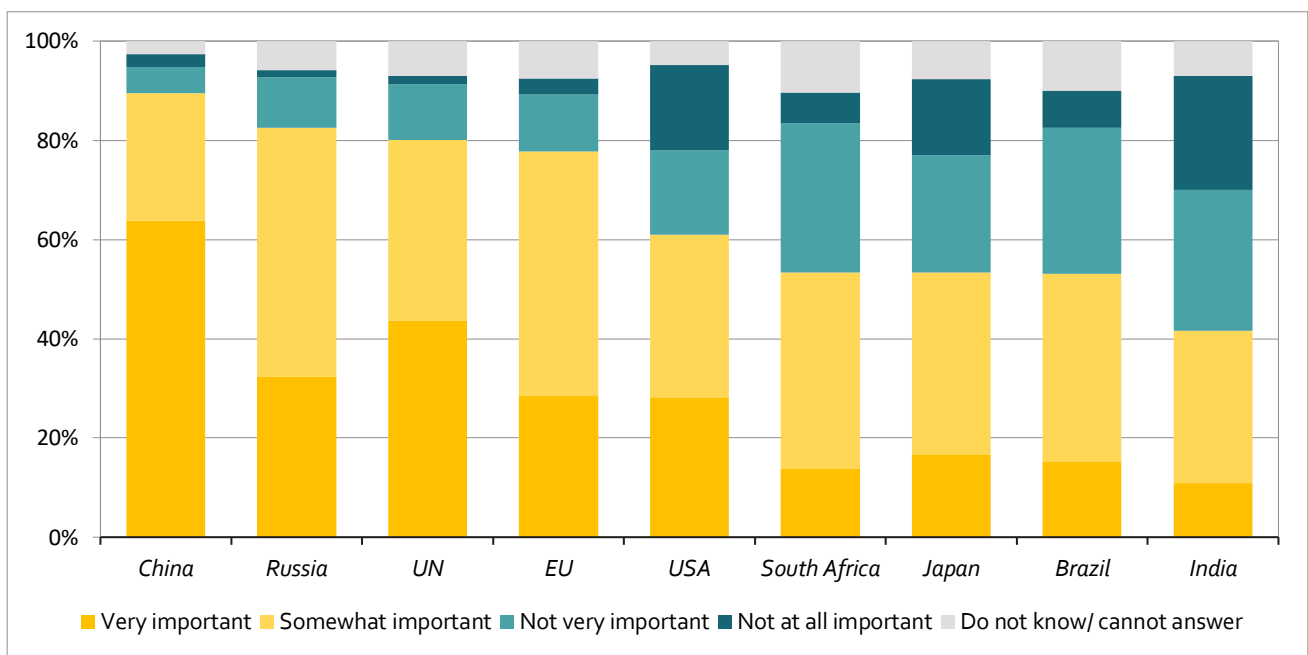
promoting human rights – significantly higher than other Western powers such as the United States or Japan. The perception here is similar to the earlier issue of the EU’s importance with respect to peace and stability. However, only 31% of respondents believe that the EU shares the same democratic principles as their country (a drop from 47.1% in 2015).

The EU is strongly identified with democratic and liberal values. Around two-thirds of respondents associate the EU with respect for human dignity, liberty, the rule of law, democracy, pluralism, and human rights. Scores for non-discrimination, solidarity and minority rights are noticeably lower yet still comfortably above 50 per cent.

Between 55.5% (the value of non-discrimination) and 72.8% (pluralism) of Chinese respondents believe their various personal values are “definitely similar” or “more or less similar” to those of the EU. It is a decrease compared to 2015 when the share of respondents who saw convergence in values ranged from 60% (the similar views on rights of minorities) to 82.3% (for pluralism).

Promotion of human rights is also seen as a major plank of EU policy in the discussions with focus groups and interviews with elites, even though here it is usually linked – as in media reporting – to negative perceptions about EU interference in domestic affairs of China and lack of respect for Chinese sovereignty and self-determination. Consequently, responses to survey questions about perceived similarities between the democratic principles of the EU and China are rather muted, with the majority of respondents neither agreeing nor disagreeing and almost 10 per cent “don’t know”.

FIGURE 27. PERCEPTION OF THE IMPORTANCE OF EU, OTHER ORGANISATIONS AND COUNTRIES IN GLOBAL HUMAN RIGHTS.CHINA



Note: based on Q11: In your view, how important, if at all, a role do each of the following countries or organisations play in promoting and defending human rights worldwide to protect human dignity, freedom, equality and solidarity? (n=1108)

Continuity and change behind the perception of EU as a norm-setter

The perception of the EU as a normative actor, albeit one that is frequently at odds with China, has not significantly changed since 2015, despite the fundamental transformation of the global context of EU-China relations in the intervening period. Given the predominance of internal crises in the EU over the past six years, the EU capacity as a global norm-setter is somewhat tarnished, with a perception that the balance of power between China and Europe has further shifted in favour of the former. Even though EU statements on the democracy movement in Hong Kong and human rights violations are heard in China, this is generally seen as meddling in internal Chinese affairs and tinged with a degree of hypocrisy. The mutual sanctions that China and the EU imposed on one another in the spring of 2021 caused the Comprehensive suspension Agreement on Investment of ratification and are significant in this context. They demonstrate how normative differences can spill over into the realm of economic exchange – an area widely seen as the strongest link between China and the EU.

1.3.5. Continuity and change

The dominant perception of the EU over the past few years is one of internal division and crisis. The image of European states disagreeing on monetary policy, migration and, most recently, pandemic response means that the EU is generally associated with negative messages and a worsening international reputation. The UK's protracted withdrawal from the EU has further contributed to the perception of a Union in decline, even though some of the more informed observers of the EU in China also recognise how the EU has overcome these challenges and even emerged stronger from them. Indeed, even if the emotive charge of reporting about EU affairs is frequently negative in Chinese media (leading to similarly negative perceptions by the public), there is an awareness that the EU persists in playing an international role despite these challenges. In some quarters, this resilience is recognised as a strength that might indicate a more united EU in the future. This also needs to be seen in the context of perceptions of the United States in China, which are more solidly negative both with regard to its political system and its influence vis-à-vis China. While both the US and the EU as seen as falling behind China in terms of their international role, with regard to the EU, views are more nuanced, including more positive perceptions of the EU's role as a trading partner, a global leader on climate action and a potential collaborator of China in technological innovation.

The general trend towards public perceptions of the EU in China is one of continuity. The EU has not become significantly more visible in the Chinese public eye, particularly in the high-profile confrontation between China and the United States under the Trump administration. At the same time, the increasingly hostile attitudes between China and the US have helped the EU to be seen in a different light, with more nuanced views on a range of policy areas and the underlying recognition that a form of partnership between China and the EU is possible. However, this is at odds with the EU's insistence to raise concerns about issues perceived as domestic by China (Hong Kong, Xinjiang) and to side with the United States against China on security issues.

An important part of the narrative about the EU in China is that of the lack of internal unity, be it about disagreements among member states on issues such as economic policy or migration, or societal discontent with regard to, for example, the measures adopted to address the COVID-19 pandemic. Such a lack of internal unity, reinforced by images of a Brexit experience, contributes to a perception of an EU that is declining, particularly in comparison with China itself.

As it happens, the pandemic has been a driver of deepening divisions between China and the EU, as the Chinese regime utilised the European and, more generally, Western difficulties in balancing personal freedoms with effective sanitary controls to emphasise the superiority of its political and social system over Western democracies. This development, together with how China has deployed vaccine

diplomacy to advance its soft power in its own region and beyond, has further complicated the EU's capacity to pursue its traditional public diplomacy in China.

Censorship, control over media and the presence of the party cells in organisations makes communicating with the local audience on themes that touch on norms and values (e.g., human rights, democracy) complicated. The COVID-19 pandemic has become the major obstacle as COVID-related restrictions have disrupted face-to-face contact with key audiences. For example, Study Tour for journalists to Europe has been cancelled because of COVID. The lack of knowledge of local contexts in EU Headquarters makes the work on appropriate communication materials complicated and delays the development of proper reactions to ongoing crises. Translation of EU messages from EU HQ to local conditions is time- and resource-consuming. The social media landscape in China is challenging to navigate, and the EUD needs more research and support in this area. EU actions on the global stage (as EU's support to COVAX) lack visibility in China.

1.3.6. Recommendations for EU public diplomacy

Given the generally low visibility of the EU, and the limited awareness – even among informed citizens – about EU programmes in China, the prime challenge for EU public diplomacy remains one of raising the EU's profile and bringing the EU, its policies and its values to the attention of a greater number of Chinese citizens. In a political system characterised by extensive censorship, governmental/party control over traditional and social media, and the absence of an independent academia or civil society, this is an inherently difficult task. This is true so even more now than it was six years ago, given the tightening of governmental controls domestically and the greater assertiveness of Chinese foreign and security policies that have occurred in the meanwhile. Both these trends have made it increasingly difficult to actively promote European values in the context of an autocratic, one-party state.

Against this background, one promising strategy might be a more explicit focus of public diplomacy on the existing strengths of EU in the perception of the Chinese public – the EU as a trade partner, a leader in climate action, an attractive location in terms of culture and lifestyle, a functioning welfare state – and amplify these strengths in the messaging about the EU. In particular, the EU's 'domestic' success in advancing environmental protection and its global leadership on climate change, are issues that resonate with young people and elites. Given that these strengths of the EU also link with objectives of the Chinese leadership makes this a promising area in which to present the EU as a model, with opportunities to raise awareness of the EU's wider ambitions in the economic, political, and social realms.

A particular area of strength for Europe here is environmental policy, and more specifically climate action, decarbonisation strategies and the European Green Deal. Chinese perceptions of Europe's role, capacity and leadership are generally positive, and this, in combination with the salience that these issues have for China itself, presents significant opportunities for public diplomacy. Public relations campaign, perhaps conducted in cooperation with researchers, corporations and think tanks, that would highlight the aspirations and achievements in the EU towards an ecological conversion of the economy are likely to resonate well with the Chinese public and this raise favourable perceptions of the EU.

Other, 'non-problematic' areas for promoting the EU would be culture, the arts, and humanities – aspects of European public life which are already viewed positively in China, and which therefore lend themselves for successful promotion. While these areas are not considered by most respondents are the leading areas of EU action in China, they have the advantage of generally being viewed less critically and are indeed being associated with positive connotations of the European way of life. Also, the very fact that these aspects of the EU are less prominent in the public perception in China means that a case can be made for cultural diplomacy to be strengthened in the future. Linking cultural activities to

European values such as diversity or freedom of expression which are frequently represented in the arts might be one way of advancing the EU's normative agenda in a less conspicuous way.

Based on the relatively more favourable attitudes towards engagement with Europe of students involved in the focus groups and university professors interviewed as multipliers, higher education presents itself as a promising target for deeper cooperation in the future. While the attraction of Europe as a destination for students and researchers may be declining compared to the previous study, educational exchanges, research collaboration and related activities remain important and relevant tools to reinforce favourable perceptions of Europe and the EU. In the same vein, universities, research institutes and think tanks are among the few potential collaborators for EU action outside the commercial sector, and the organisation of joint events with such local partners (e.g. book launches, art exhibitions, research workshops) would constitute promising avenues to achieve these aims.

A more political arena for promoting the EU might be social policy – perhaps challenging in view of the technical aspects of modern welfare states. But at least among elites there is a recognition that in the context of domestic changes and reforms inside China, the European experience can be valuable, thus providing opportunities both for promoting the EU and launching new forms of cooperation and policy-learning. In this regard, support for joint studies and/or workshops involving European and Chinese researchers on issues such welfare state reform, the challenge of ageing societies, or combatting tax evasion – challenges confronting both the European and Chinese societies – might be a valuable strategy that would showcase European expertise on these issues and might potentially facilitate policy-learning and -transfer. In this way, a positive impact of Chinese attitudes towards Europe, at least from the elites involved, can also be expected.

However, a selective strategy focused on areas in which the existing emotive charge about the EU is already positive risks to avoid those areas such as human rights, the rule of law and regional stability, which are essential to the EU, also vis-à-vis China, but which imply unwelcome messages – and hence adverse reactions towards the EU - there. In other words, the EU's public diplomacy in China is easily drawn into the dilemmas of self-censorship prevalent in that country's system of public debate.

The search for organisations that could act as local partners for the EU in spreading its message is problematic for the same reason: in a system that is largely subject to top-down control by the government/party, there is no meaningful chance to find independent, civil society actors that could help the EU's institutions in their effort at public diplomacy, except for two possible exceptions: first, given the predominant perception of the EU as an economic actor and trade partner of China, private businesses are likely partners of the EU in amplifying the message about the mutual benefit of trade, investment and economic cooperation. This applies both to individual firms as well as to sectoral associations, chambers of commerce or other collective arrangements. It is evident, however, that any such cooperation with the Chinese business community would have to limit itself to commercial policy and avoid politically sensitive topics that such potential partners would shy away from, fearing negative repercussions from the authorities.

Second, as highlighted above, the world of academia – students, academics, and institutions of higher educations – are likely to open to cooperation with the EU, given the positive images of the ERASMUS+ programme and the past track record of educational exchange and research collaboration. Despite (or perhaps precisely because of) education and culture not being mentioned in the various surveys as leading areas of interest with which the EU associated in China, the positive perceptions at the individual level about student exchanges, visiting fellowships and research collaboration are a potentially area that could be leveraged more. These perceptions tie in with favourable attitudes in the wider society about the EU's standing in science, technology and innovation, and the expectation of potential benefits that both sides can expect from closer cooperation in this field. Especially in the

context of continuing antagonism between China and the US, also with respect to competition in high-tech industries, a focus on education, research and science would promise to provide opportunities for deeper and more fruitful cooperation.

EU public diplomacy also must navigate the broader political context, be it in Europe, China, or globally. Developments such as internal divisions among the EU member states, or the more significant rivalry between global powers, constitute challenging circumstances that are, of course, outside the control of those conducting public diplomacy on behalf of the EU. Nevertheless, these broader trends have a significant influence on the way in which messaging on behalf of the EU is understood. This is not the place for detailed advice but merely the more general recommendation to take the broader context into account when promoting the EU. It might mean, on occasion, to emphasise that internal divisions in the EU are not necessarily a sign of weakness, but simply one more expression of pluralism which is a fundamental European value and one that can be a source of strength. Another such example might be a public message that actively differentiates EU policy from that of the US (in areas where these are distinct), to communicate to the Chinese public that despite the general perception of the EU being part of 'the West', differences in policy (and even in values) might be possible.

The challenges for EU public diplomacy have only increased in years since the previous country report, with a domestic environment in China that has generally become more hostile to foreign, especially Western, influences. It leaves those seeking to promote the EU with an unpalatable choice between staying clear of 'politics' when conducting public diplomacy or risking being further marginalised from the public discourse when promoting European political values and interests.

1.4. Colombia

This Country Chapter presents a synthesis of the Colombia-specific findings based on traditional and social media analyses, interviews with multipliers and influencers, focus groups with university students and a public opinion poll – all conducted in the framework of the Update Study 2021. The structure of the chapter follows the logic of the research design. We present the main findings for Colombia according to the research indicators guiding the 2021 Study: visibility, actorness, local resonance; and norm-setting. We also discuss findings according to the themes analysed in this study: economy and trade; political issues; development; social issues; environment; energy; science, research and technology; culture; education and health. The penultimate section looks at the drivers behind perceptions of the EU and Europe in Colombia. We conclude the chapter with recommendations for the EU's public diplomacy in 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.

1.4.1. Sample

Public opinion

The online survey was coordinated and conducted by PPMI through an online panel provided by Syno International. The respondents in Colombia were surveyed in Spanish. The data collection took place from 28 April to 16 May 2021. The sampling for the survey was designed to be nationally representative of age, gender and regions. The respondent profiles in Colombia were established based on data from the Colombian National Statistics Directorate (DANE)¹¹. The survey included a total of 1,106 individuals aged between 15 and 64 years old¹².

Media

The quantitative part of the media analysis which identifies the general trends in a large press media sample, was carried out by PPMI. The study monitors five popular dailies *El Espectador*; *El Pais*; *El Tiempo*; *El Herald*; *El Nuevo Siglo* and one business daily *Portafolio* from 1 February to 30 April 2021. The *Factiva* repository was used to aggregate content from both licensed and free sources, and in-house data processing was applied to produce the results.

The dataset consists of two parts, collected in the Spanish language during the observation period – “EU” (584 articles) and “Europe” (1,162 articles). Search terms for the dataset “EU” are: “European Union”, “EU”, “European Commission”, “European Parliament”, “Court of Justice of the European Union”, “EU presidency”, “EU Council”, “European Council”, “Council of the European Union”, “Eurozone”, “European Central Bank”, “European Investment Bank”, “European Medicines Agency”. The search terms for the dataset “Europe” are “Europe”, “European” and “Europeans”. The search terms for “EU” and “Europe” datasets consider both plural and singular forms as well as possible grammatical forms of the search terms in the local language. Europe dataset excludes articles containing any of the “EU” dataset keywords.

The qualitative media content analysis of news that reported the EU as a major focus (33 articles) was designed, supervised and coordinated by experts from the Public Diplomacy and Political Communication Forum (PD-PCF), University of Canterbury (UC), New Zealand, and conducted by Country Experts trained by the PD-PCF, UC. PPMI collected the media sample for the in-depth qualitative content analysis using the search engine from two prestigious newspapers *El Espectador* and *El Pais*, and one business newspaper *Portafolio*. The observation timeframe remained the same as for the quantitative and social media analyses. Experts analysed the EU image created by applying elements of content, cognitive and critical discourse analyses.

Social media

PPMI carried out the social media analysis. The data collection process was automated using the online social media monitoring tool *Mediatoolkit*. Social media posts were collected from Twitter, Facebook and Instagram with the use of automated queries. Coverage of the EU was traced using a set of the EU-related keywords: “European Union”, “EU”, “European Commission”, “European Parliament”, “Court of Justice of the European Union”, “CJEU”, “EU presidency”, “EU Council”, “Council of the European Union”, “European Council”, “Eurozone”, “European Central Bank”, “European Investment Bank”, “European Medicines Agency”. All the keywords were additionally traced in one-word format to

¹¹ Colombian National Statistics Directorate (DANE): <https://www.dane.gov.co/index.php/en/>

¹² Detailed public opinion survey data are available in Annex II of this Report – Comparative public opinion survey report.

capture related hashtags: europeanunion, europeancomission, europeanparliament, courtofjusticeoftheeuropeanunion, eupresidency, eucouncil, europeancouncil, counciloftheeuropeanunion, europeancentralbank, europeaninvestmentbank, europeanmedicinesagency. Europe-specific keywords used for filtering relevant social media posts are “Europe” and “European”. Europe dataset excludes posts containing any of the “EU” dataset keywords. Additionally, the mentions were filtered through a location filter to ensure that the collected mentions originate from Colombia. A language filter was set up to collect posts in English and Spanish. The resulting sample of Colombian social media posts collected from 1 February to 30 April 2021 includes 19,234 mentions, of which 5,904 mention the EU (81% in Spanish) and 13,349 mention Europe (86% in Spanish).

Working with social media platforms, the Project Team followed each platform’s terms of use. All identifiable information of individuals from social media data remains confidential and is removed before publication of findings. Computational analyses of the large number samples involve only contents from media databases’ public websites and non-private social media accounts – that is, posts that are available to public audiences. No generalised conclusions that might cause any potential harm will be drawn from social media analyses on identifiable communities

Interviews and focus groups

Interviews with local opinion- and decision-makers as well as focus groups with students were conducted by the Country Experts, with training support and supervision from PD-PCF, UC, following the approval of the UC Human Ethics Committee. As part of this study, interviews and focus groups aim to provide in-depth explanations about Colombian perceptions of Europe and the EU and cross-reference the findings from the public opinion survey, traditional and social media analyses.

The sample of the *focus groups* includes 8 participants (6 female, 2 male), aged 18-23, in their 3rd to 5th year of their undergraduate degree in areas such as environmental engineering, politics and international relations, European studies, social sciences, gender studies, communication and journalism. *Interviews with 12 multipliers and influencers* included interviews with policymakers from government and the opposition party (3), civil society organisations (3), academia and think tanks (3), and the media (3) from three of the most popular newspapers, television or radio channels. All *focus group participants* and *multipliers and influencers* demonstrate a high awareness of the EU and its most notable actions in the Colombian context during recent years. Although few students had travelled or studied in the EU/Europe, most multipliers and influencers interviewed have worked with the EU and its organisations or studied in the EU. In addition, semi-structured, anonymous qualitative group interviews under Chatham House Rules were conducted with all EU Delegations across the 13 key partner countries. Interviews lasted between 60 to 90 minutes. The group interview with representatives of the EU Delegation to Colombia was conducted on 18 March 2021 by members of the Core Team (PD-PCF UC and PPMI) and the Country Experts.

1.4.2. Visibility

Survey findings reveal that Colombians recognize the EU as an entity: when asked about how they feel about the EU, only 1.5% answered “Don’t know/cannot answer” – a contrast to other international actors such as Russia (0.8%), China (0.8%), Brazil (1.1%), the US (1.1%), and the United Nations (UN) (1.4%). The EU is also more visible than other international actors or partnerships such as Japan (2.1%), India (2.3%), World Bank (3.0%), South Africa (3.0%), MERCOSUR (4.2%), World Trade Organization (WTO) (5.1%), North Atlantic Treaty Organization (NATO) (6.0%), United States-Mexico-Canada Agreement (USMCA) (7.5%), and the Association of Southeast Asian Nations (ASEAN) (12.0%).

The general public associates the EU most commonly with descriptors such as *modern* (56.4%), *efficient* (45.7%), *strong* (43.4%), *united* (39.5%) and *multicultural* (35.0%). In comparison, the public assigns the descriptor *modern* more prominently to Japan (74.0%), the US (66.9%) and China (59.9%) than the EU. Japan (58.7%) and China (50.3%) also attract a higher share of responses describing them as *efficient*. Russia (62.1%), Japan (54.0%) and the US (52.5%) are described as *strong* more frequently than the EU. As for the descriptor *multicultural*, Brazil is associated with this term more frequently than the EU (35.0%). However, in terms of being seen as *united*, the EU gets the highest share of responses than any other actor on the list (39.5%). Compared with the other actors, the EU has the lowest percentage related to negative terms such as *aggressive* (5.8%), *arrogant* (4.1%) and *hypocritical* (3.1%), while Russia is considered the most *aggressive* (40.3%), the most *arrogant* (20.1%) also the most *hypocritical* (12.2%) from the list of countries and organisations.

The data on perceptions of EU policies and actions in different domains show a positive image of the EU in the fields of *tourism* (55.8% “very good”), *global trade* (48.3% “very good”), *science and research* (47.7% “very good”), *financial services and banking* (44.1% “very good”) and *industrial development* (44.0% “very good”). On average, less than 2% of respondents choose negative options of “fairly bad” or “very bad” to describe the perception of EU in those domains. The themes that attract most of the “do not know/cannot answer” responses, are *space exploration technologies* (6.3%), *agriculture* (4.4%), *high quality food industry* (4.3%) and *media and publishing* (4.3%).

In the context of receiving news about the EU, 35.5% of Colombian respondents hear/read about the EU “more or less everyday” and 39.9% “about once a week”. Very few say “never” (0.3%) or “do not know/cannot answer” (0.9%) to this question.

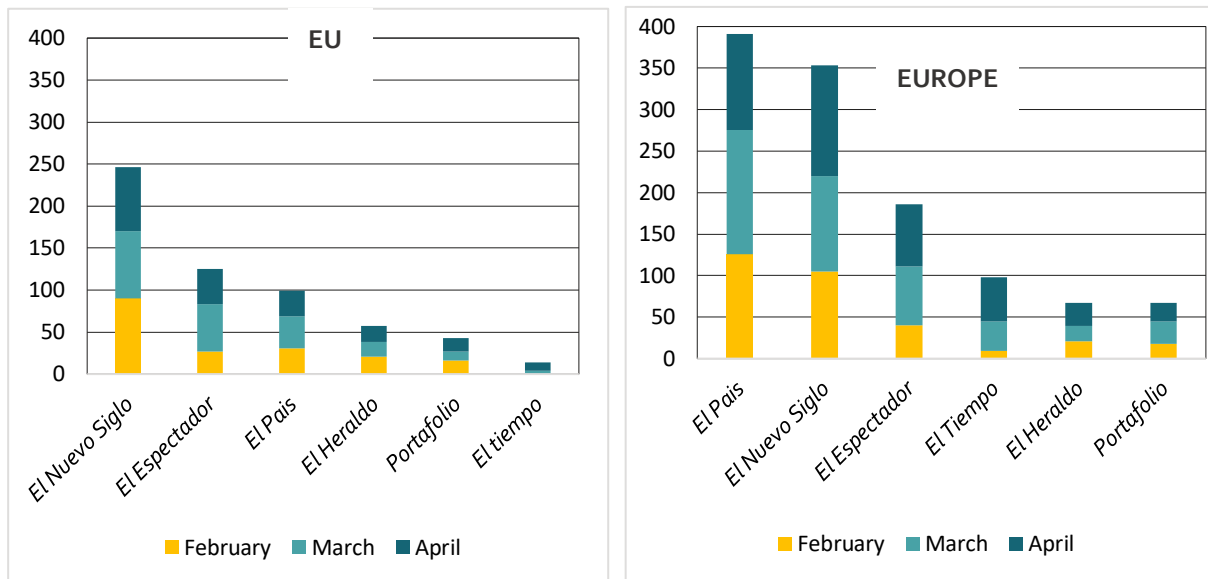
The coverage of “Europe” in *traditional media (press)* is significantly higher than coverage of the “EU” and its institutions throughout the whole period of observation (66.5% vs. 33.5% of the total dataset). Data shows that the “EU” dataset has slightly higher *media* visibility in terms of volume in March (35.3%) than in April (33%) and February (31.7%). The coverage on “Europe” is slightly higher in April (36.7%) and March (35.8%) than in February (27.5%). Higher coverage during March for both the “EU” and “Europe” is based on Colombia’s interest in the progress of vaccination in Europe, as the vaccination campaign had just started in Europe including initial reports about adverse effects of the vaccine in some countries (Germany, Denmark, France and Italy) and the subsequent announcement of the European Medicines Agency (EMA) to investigate the side effects.

The data also shows the volume of “EU” news by press outlets during the observation period: *El Nuevo Siglo* (246 news articles), *El Espectador* (125 news articles), *El Pais* (99 news articles), *El Heraldo* (57 news articles), *Portafolio* (43 news articles) and *El Tiempo* (13 news articles). for the “Europe” dataset the division of publications reads as follows: *El Pais* (391 news articles), *El Nuevo Siglo* (353 news articles), *El Espectador* (186 news articles), *El Tiempo* (98 news articles), *El Heraldo* (67 news articles) and *Portafolio* (67 news articles).

In the reference of the “EU” vs. “Europe”, the focus group participants who do not have much knowledge about the EU (students in degrees other than international relations) often use terms “Europe” or “EU” interchangeably. However, participants with more knowledge of Europe and the EU distinguish between Europe as the territory and the EU as the institution or international actor. This trend reflects references to Europe and the EU made by traditional news media.

The EU is also usually centrally featured in the media reportage. It features in high degree of centrality (40-60%) in the relevant dailies in all but one (*El Tiempo* 7%). Overall, the EU’s high degree of centrality means that the EU and its institutions are often profiled as the main actors in the news stories.

FIGURE 28. VOLUME OF NEWS ITEMS WITH A REFERENCE TO THE EU AND EUROPE IN MEDIA. COLOMBIA



Note: based on automated quantitative data analysis. Includes press articles which report on the EU and Europe as a principal or secondary subject of the article.

In the observed Colombian press, the articles about the EU are often reported in the “international/world/foreign news” sections. However, when the EU’s actions are reported with a “local hook” – such as news related to the peace and post-conflict process in Colombia and/or the EU-Colombia Trade Agreement – they are more likely placed in the “politics” and “economy/finance” sections. When EU news deal with more current topics such as COVID-19, vaccination, climate change or environmental protection they typically feature in the “health” and “environment” sections. The placement indicates that the EU is presented as an international actor or leader in general news but when the news is of relevance to Colombian interests or involves a “local hook”, the EU is presented as a political or economic actor and partner.

In *social media*, the visibility of Europe is higher than that of the EU: “Europe” has 100-500 mentions on average as opposed to slightly over 100-300 of the EU. The higher peak in *Europe-related posts* on 19 April 2021 is linked to the discussion around the creation of the European Super League. The high peak of *EU-related posts* on 24 March 2021 reflects retweets of a tweet about the Agreement between the Republic of Colombia and the European Investment Bank (EIB) on the establishment of a regional representation of the EIB in Colombia. In the words of representatives of the opposition party, this agreement would give full immunity to EIB officials, their families, their property, their assets and their facilities from any legal process. The POLO Party Senator Wilson Arias notes: ‘EIB officials and their families could commit acts of corruption, trafficking and money laundering with total immunity from Colombian laws’. This tweet was retweeted frequently and included criticism of the opposition party although it did not ultimately hinder the approval.

Visibility of EU institutions and EU leaders. Visibility of Member States and their leaders

The most visible *EU actors* mentioned in Colombian press are the European Commission, European Parliament, the EMA and the European Central Bank. These EU actors are mentioned mostly in the context of the COVID-19 pandemic, environment-related actions and finally EU actions in the field of democracy and human rights. The European Commission is mentioned the most frequently (76)

followed by the EMA (73). Significantly less mentioned are the European Parliament (24), European Central Bank (23), European Council (12), European Investment Bank (2) and European External Action Service (2). Other EU institutions are not mentioned in the media articles.

Among the *EU institutions*, in Colombian social media, the European Parliament is the most visible with 621 mentions, especially on peace and human rights. Almost the same share of public attention is paid to the European Investment Bank (452); followed by the European Commission (261) and the European Central Bank (200 mentions). The EMA is mentioned 160 times in the context of the COVID-19 pandemic and specifically its vaccine approvals process.

Only few EU officials are cited in traditional media articles. The most visible are President of the European Commission Ursula von der Leyen, in the context of EU political statements, and High Representative for Foreign Affairs and Security Policy Joseph Borrell. Finally, the Head of the EU Delegation to Colombia, Patricia Lombart, is visible in the context of bilateral relations.

Among the Heads of EU Member States, the most frequently mentioned in *social media* is Pedro Sanchez, President of the Spanish Government (20 mentions) – unsurprising given Colombia’s close relations with Spain. Angela Merkel, Chancellor of Germany (9 mentions) and Emmanuel Macron, President of France (7 mentions) both are notable political figures in the *social media* dataset. Other less mentioned Heads of EU Member States are Viktor Orbán, Prime Minister of Hungary, Mario Draghi, Prime Minister of Italy, Sebastian Kurz, Chancellor of Austria, Micheál Martin, Prime Minister of Ireland, and Mark Rutte, Prime Minister of the Netherlands.

As for the EU officials, the most mentioned on *social media* are President of the European Commission Ursula von der Leyen (45 mentions), President of the European Council Charles Michel (12 mentions) and High Representative for Foreign Affairs and Security Policy Josep Borrell (8 mentions). Vice-president of the European Commission Margaritis Schinas, President of the European Central Bank Christine Lagarde, Executive Vice President of the European Commission Magrethe Vestager and Vice-President of the European Commission for Interinstitutional Relations Maroš Šefčovič receive less attention.

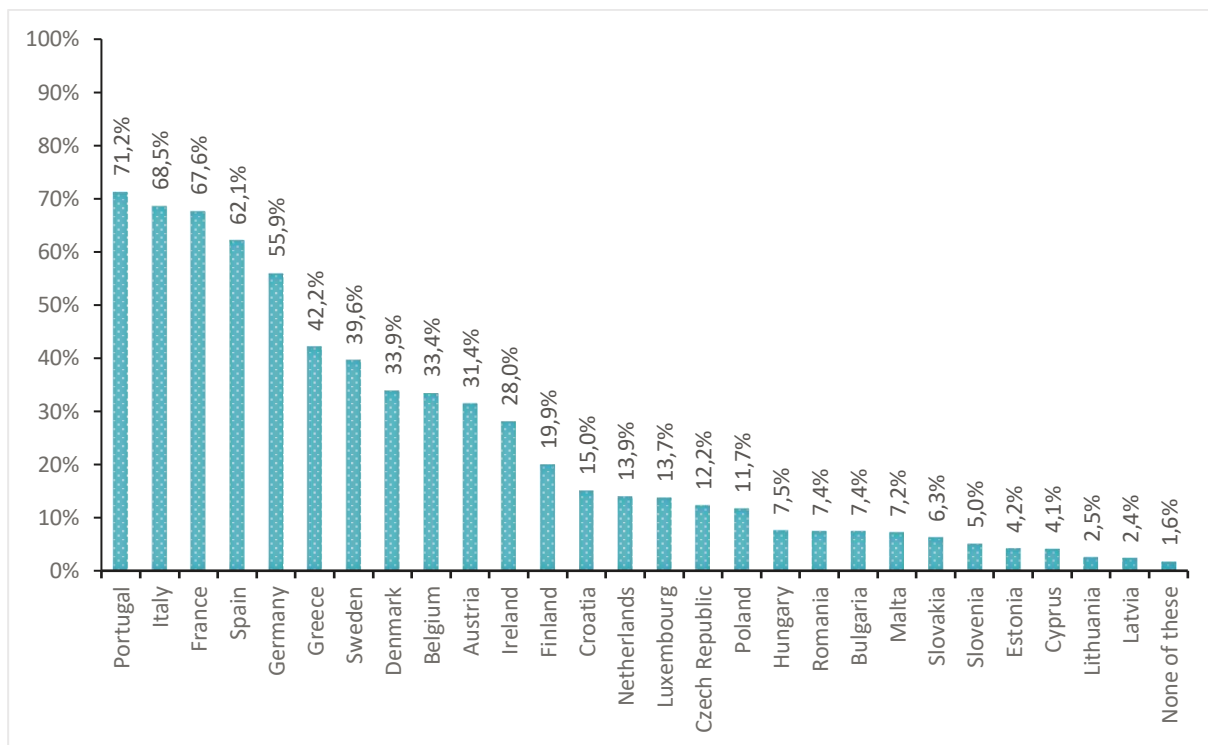
The four most frequently mentioned Member States in the *traditional media* sample (press) in EU- and Europe-related news are Spain, France, Germany, and Italy. France, Germany and Italy are referenced in terms of their role as political and economic influencers within the EU but also in relation to themes with Colombian interests in focus, such as trade, environment and biodiversity. Due to Colombia’s close historical ties with Spain, Spain is a key reference and functions as a “gateway” to Europe and the EU. Less frequently mentioned are Denmark, Belgium, Netherlands, Portugal, Greece, and Poland. Other countries such as Sweden, Austria, Finland, Ireland, Luxembourg, Romania, Czech Republic, Croatia, Bulgaria, Hungary, Malta, Slovakia, Cyprus, Slovenia, Estonia, Lithuania, and Latvia are not mentioned.

The *social media* analysis reveals a similar pattern: with Spain (725) being the most frequently mentioned *Member State*, followed by Italy (267), Germany (213) and France (206). Other countries such as Portugal, Denmark, Hungary, Poland, Sweden, and Ireland get lesser number of references in social media. The rest of the EU Member States are not visible.

To the question “Which European countries look the most attractive to you?”, the Colombian public opinion indicates that the most attractive EU Member States are Spain (78.6%), Italy (77.0%), France (75.6%), Germany (68.5%), Netherlands (56.4%) and Greece (55.2%), followed closely by Portugal (49.6%), Sweden (47.7%), Austria (45.0%), Belgium (39.1%), Denmark (34.0%), Finland (29.5%), Ireland (27.2%), Luxembourg (26.1%), Poland (24.3%), Romania (19.4%), Czech Republic (19.2%), Croatia (18.7%),

Bulgaria (15.4%), Hungary (12.7%), Malta (12.2%), Slovakia (10.0%), Cyprus (8.7%), Slovenia (8.4%), Estonia (6.5%), Lithuania (5.2%), and Latvia (4.7%).

FIGURE 29. ATTRACTIVENESS OF THE INDIVIDUAL EU MEMBER STATES. COLOMBIA



Note: based on Q25: Please indicate which European countries look the most attractive to you? Respondents could choose more than one country (n=1150). Respondents were not limited in the number of countries they could name.

The *focus groups* with students and interviews with *influencers and multipliers* show that the EU in general, its institutions and its Member States in particular, have a positive visibility among all participants. For both groups, the most visible issues in relation to the EU are Colombian national priorities such as the peace and post-conflict agreement and the Trade Agreement.

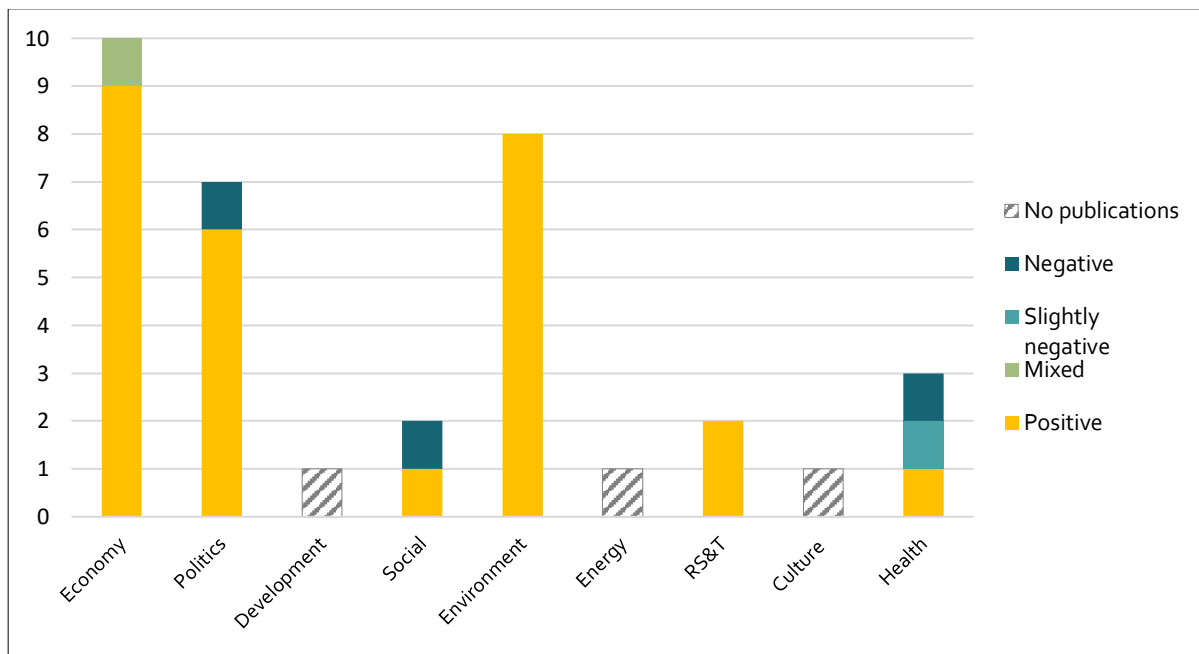
The *students* do not mention any specific institutions, but students do acknowledge the action of the EU in Colombia through the EU Delegation to Colombia. For students the Member States of the EU such as Spain, Germany and France are considered more visible than the EU, especially in terms of political and economic influences in and outside the EU, and in reference to tourism, culture, and education. Angela Merkel, German Chancellor, is the most recognized and visible figure and she is the only Head of an EU Member State mentioned repeatedly and no other EU Member State or EU official is referenced.

As for the interviewed *influencers and multipliers*, they demonstrate a better knowledge of the EU's institutions/officials and Member States. The European Commission and the European Parliament are the most visible institutions for this target group, together with different European civil society organizations (mainly on human rights and agriculture). Interviewed experts are also aware of the presence of the EU Delegation in Colombia and its activities on peace, trade, environment, education, investments, human rights, and bilateral relations, among others. Along with the recognition of the visibility of the EU, they also recognise the presence of Member States such as Germany, Spain, France and the Netherlands through their cooperation agencies and embassies in Colombia, engaging on environment, agriculture, energy, trade, culture, and education. For the group of *influencers and multipliers*, Angela Merkel Chancellor of Germany is (again) the most visible figure as followed by

Emmanuel Macron President of France and Pedro Sanchez President of the Spanish Government. The most recognised *EU officials* for this group are Josep Borrel High Representative for Foreign Affairs and Security Policy, and Patricia Lombart, Head of the EU Delegation to Colombia.

Emotive charge

FIGURE 30. EMOTIVE CHARGE IN PRESS ARTICLES REPORTING ON THE EU AS A PRINCIPAL SUBJECT. COLOMBIA



Note: Based on qualitative media analysis conducted by country experts. One article can reflect more than one theme.

A sense of “distance” can be observed in Colombia: When the EU seems detached from Colombia or its current situation, the emotive charge tends to be neutral, although the Colombian media framing of the EU is overall positive.

For students in the *focus groups* and interviewed *influencers and multipliers*, the emotive charge is neutral angle or neutral to positive, especially when the EU appears disconnected and without a “local hook”. When the topic is relevant to Colombia and the EU at the same time, the emotive charge is positive.

In *traditional media*, in news where the EU is reported as the main actor, a *positive emotive charge* dominates, especially on topics such as *economy, environment, politics, research, science & technology*. A *negative emotive charge* is presented in the same frequency as the positive charge for topics such as *social and health*. Development, energy, and culture are not referenced.

In *social media*, the emotive charge of EU-related posts is almost evenly spread between neutral (35.7%), negative (32.3%) and positive (32%); a slight difference is seen for Europe-related posts, where the positive emotive charge (41.28%) dominates, followed by negative (32.35%) and neutral (26.35%). Health (37%), economy (26%) and politics (21%) compose the bulk of social media posts. Health theme has the highest (41%) share of posts in negative tone. Economy theme has the highest share (46%) of posts in neutral tone. Overall, social media feature in neutral/positive emotive charge for EU/Europe-related posts.

Continuity and change behind visibility and emotive charge

Although Colombia was not a part of the 2015 Baseline Study, the *Literature Review* reveals that key audience groups and media portray the EU in a positive way, endowing the EU with a significant visibility in the country. The EU is perceived as always having been an important international cooperation partner to Colombia, and it has become more relevant through the years. The most visible perceptions of the EU are linked to the EU's support of the peace and post-conflict process and the Trade Agreement. More recently, environment protection, biodiversity, and energy, and, most recently, the global impact of COVID-19 and the issues around vaccines, have also caught attention of the media and public.

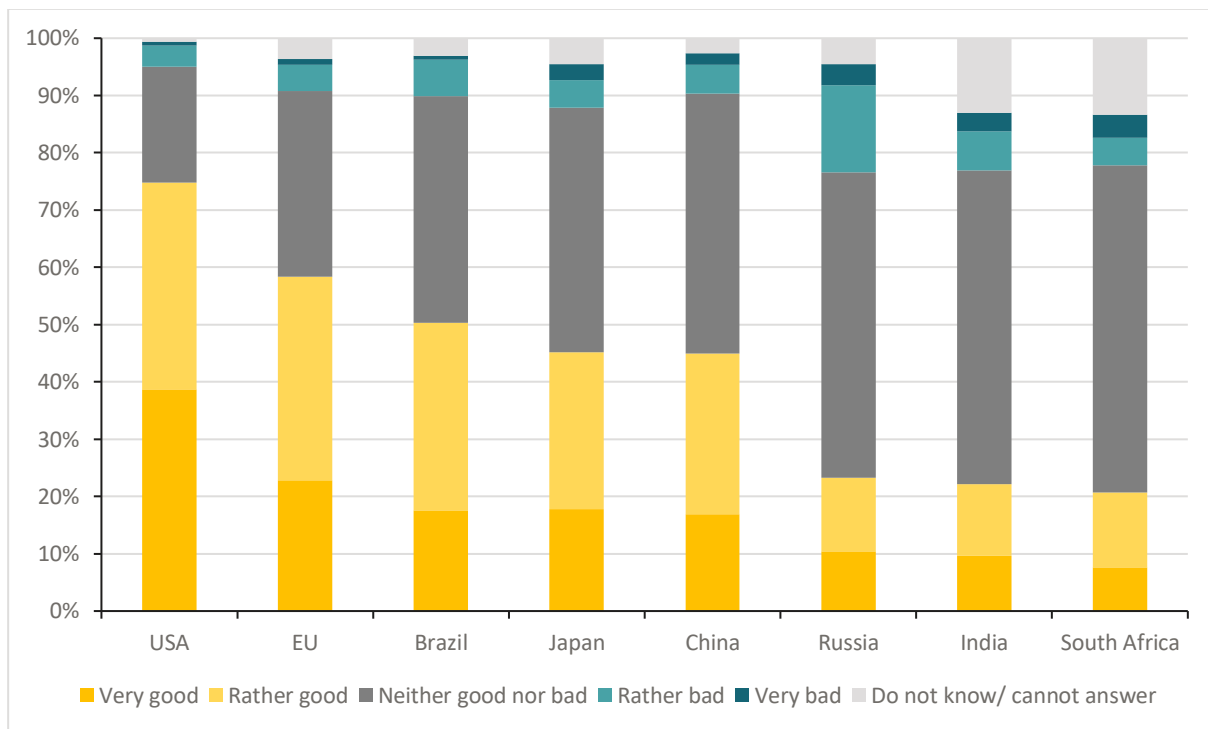
1.4.3. Actorness and local resonance

The EU as a partner

The *public opinion survey* reveals that when compared to other prominent international actors, the EU is second only to the US, who has been the most important partner to Colombia for decades. 22.8% of respondents consider the relation with the EU as “*very good*”, in comparison to the US with 38.7%. These are followed by “*very good*” evaluation of Colombia's relationship with Japan (17.8%), Brazil (17.6%), China (16.9%), Russia (10.4%), India (9.7%) and South Africa (7.6%). A high percentage of “*Do Not know/Cannot answer*” is mentioned for Colombia's relationship with South Africa (57.0%), India (54.8%), Russia (53.3%), China (45.4%) and Japan (42.7%). No substantial percentage of “*rather bad or very bad*” are mentioned except for Russia with 15.2%.

The EU is seen as one of the most *important partners* to Colombia (40.3% of respondents “strongly agree” or “agree” with this statement). Moreover, 43.5% agree that “the EU is a trustworthy partner” to Colombia, and 37.4% agree that “the EU is an important partner for Colombia's education exchanges”. Finally, 44.5% strongly agree on that “the EU should have stronger political ties” with Colombia. No substantial percentage of “disagree/strongly disagree” is present in the responses.

FIGURE 31. EVALUATION OF COLOMBIA RELATIONSHIP WITH THE EU AND OTHER COUNTRIES



Note: based on Q3: Which of the following words best describes your country’s overall relationship with each of the following countries and organisations? (n=1106)

The *focus groups* reveal that students see Colombia and the EU in the context of solid and lasting relations for years. However, students consider that this relation should be strengthened through the EU’s presence and closer connection to the realities of Colombia and through availability of information about the EU and its actions to a wider public in the country. Students have high expectations of future bilateral relations on issues outside of those already established (peace process and trade agreement) and they want a deeper cooperation in new issues pertaining to national interests but with global impact such as environment, biodiversity and renewable energy. The EU is seen as a recognised leader in these issues, and for the students, the EU is a role model to follow in general.

The interviewed national *multipliers and influencers* recognise that Colombia-EU relations are strengthening and also expect them to develop in the future. However, the interviewees see that the bilateral relationship in the future will depend mainly on the government elected in Colombia by 2022, the outcome of which – given the political polarisation in Colombia – is highly uncertain.

Most of the news articles in the *media* do not specify sources of information. The quantitative analysis of the larger sample demonstrates that the most used international source of the “EU” news is AFP (84%). Other, less used news agencies are Bloomberg (3%), *The New York Times* (3%), Associated Press (2%) and BBC (2%). When it comes to the smaller sample of the news that report the EU as a major focus, the leading news sources are the AFP and the EFE agency (both European press agencies). There is also a considerable presence of mixed sources (local and international) in the QL dataset when the news

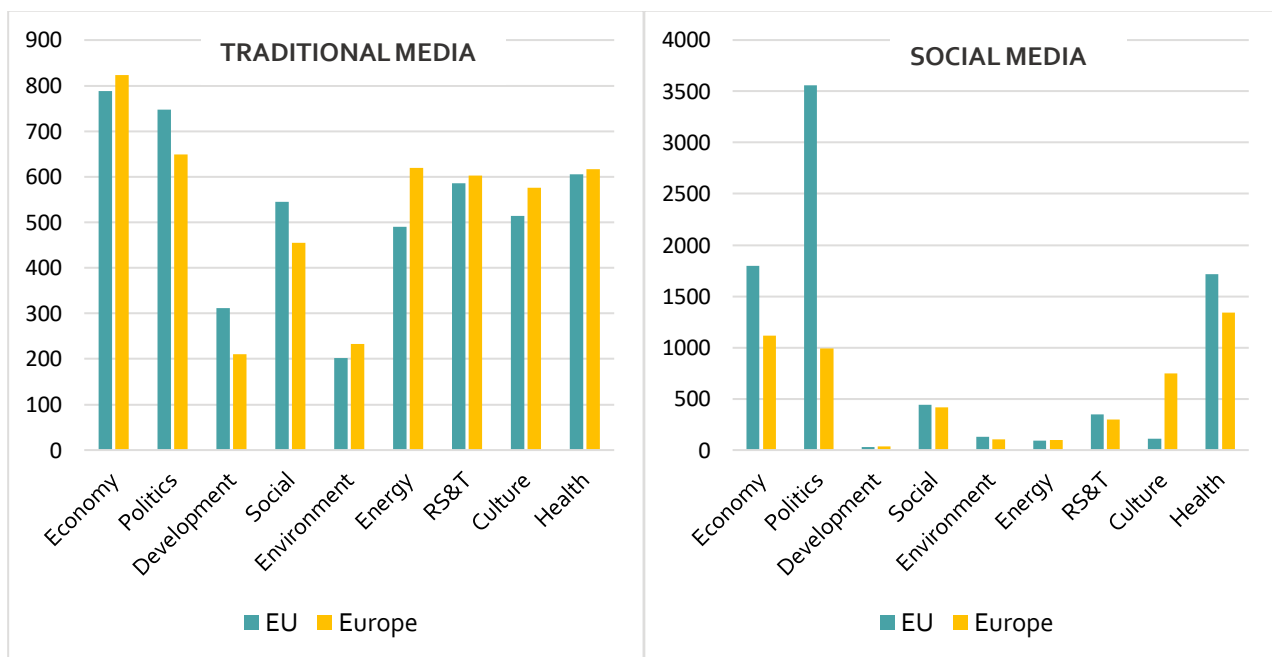
reports on the EU as a major theme and with “local hook”. Most of the news articles do not have a specific author -- sometimes it is the newsroom section that is noted as the author (for *El Espectador* and

El Pais). In contrast, in the business daily *Portafolio*, the most prolific correspondents in EU news are Ruben Lopez Perez, Laura Viviana Lesmes Diaz and Francisco Miranda Hamburger.

In the *traditional media* quantitative analysis, news focus themes such as *economy* (EU dataset 788 and Europe dataset 823 articles), *health* (EU dataset 606 and Europe dataset 617 articles), *RST* (EU dataset 586 and Europe dataset 603 articles), *culture* (EU dataset 514 and Europe dataset 576 articles) and *climate and environment* (EU dataset 202 and Europe dataset 233 articles). A slight difference between the EU and Europe persists on topics such as *politics* (EU dataset 748 and Europe dataset 649 articles), *social* (EU dataset 545 and Europe dataset 455 articles), *energy* (EU dataset 490 and Europe dataset 619 articles) and *development* (EU dataset 312 and Europe dataset 210 articles).

On the percentage of distribution of thematic frames in the coverage of the *EU* and *Europe* in the press, the EU is most often mentioned in reference to the *health* (26%), *politics* (25%) and *economy* (20%) themes. For the “*Europe*” dataset, the pattern is similar, with most visible themes being *health* (23%), *politics* (19%) and *economy* (17%). Of note is that the “*Europe*” dataset has a significantly higher coverage of the *culture* theme (19%) compared to the “*EU*” dataset (3%), particularly for *El Pais*, which focuses most of its coverage on culture in the “*Europe*” dataset. For both “*Europe*” and “*EU*” datasets, *development* (2-3%), *energy* (2-3%) and *environment* (3-5%) are significantly less covered. The distribution of thematic focus highlights the significance of “local hooks” (*location-specific drivers*) and the global impact and EU handling of the pandemic (*global and EU-specific drivers*).

FIGURE 32. THEMATICAL FOCUS OF SOCIAL MEDIA AND PRESS ARTICLES REPORTING ON EU AND EUROPE. COLOMBIA



Note: based on automated quantitative data analysis. Includes press articles which report on the EU and Europe as a principal or a secondary subject of the article. One article can reflect more than one theme.

In Colombian *social media*, the thematic frames where the *EU* is more often mentioned are also *health* (36.9%) and *economy* (28.6%), followed by *politics* (21.2%). A much smaller share of posts deal with *social* (7%). In comparison to the *EU*, *Europe* is much more often mentioned in reference to *culture* (2.3% for the *EU* vs. 18.8% for *Europe*). The themes of *development*, *environment* or *energy* do not substantially feature in social media posts on either Europe or the EU.

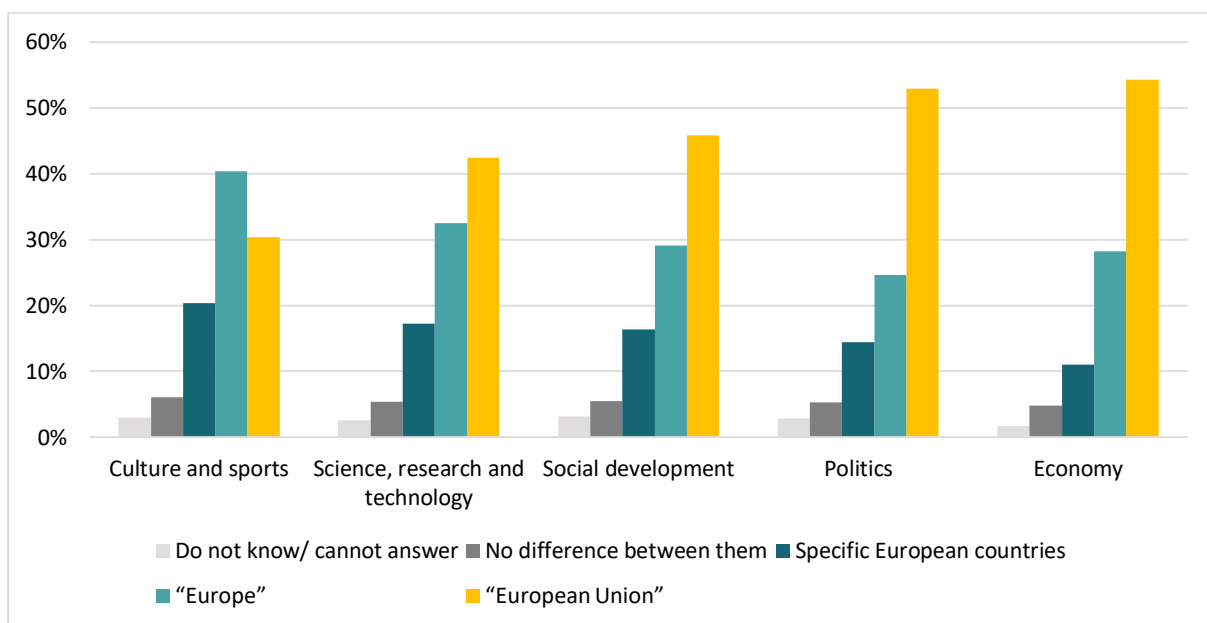
However, for *social media*, the most positively evaluated themes that relate to the *EU/Europe* are *culture*, (49.9%), *environment* (48.7%), *energy* (45%) and *social* (40.81%), indicating significant potential for EU public diplomacy. The most negatively evaluated themes are *development* (73.03%), *health* (44.78%) and *politics* (42.29%).

For Colombian *public opinion*, the *EU* is more associated with themes such as *economy* (EU 54.3% vs. Europe 28.2%), *politics* (EU 52.9% vs. Europe 24.6%), *social development* (EU 45.9% vs. Europe 29.1%) and *RST* (EU 42.4% vs. Europe 32.5%). But when talking about *culture* and *sports*, *Europe* is more often associated than the *EU* (Europe 40.4% vs. EU 30.3%)

The *public opinion* survey shows that the main sources of information on the *EU* are television channels (69.6%), online media (66.7%), and social media (55.9%), followed by streaming platforms (47.1%), print media (32.3%), movies, art, and literature (29.9%), radio (23.9%), school, college or university (20.0%), the government (19.0%), personal and professional contact with Europeans (13.5%) and lastly the *EU* Delegation (5.6%).

Economy and trade

FIGURE 33. ASSOCIATION OF DIFFERENT AREAS TO THE EU VERSUS EUROPE. COLOMBIA



Note: based on the answers to Q22: Some people think about Europe, whereas others think about the European Union when talking about economy, politics, culture, sports and other areas. In your case, which term – Europe or the European Union - comes to your mind first when you think about the following subjects? (N=1106)

**Please note that in 2015, this question was accompanied by a chart in a different format under the section “Research, science and technology”. The wording and answer categories used in this question have changed in 2021, making it inappropriate to conduct historical comparisons.*

In the Colombian *press*, the theme *economy* is one of the top EU-related themes and is portrayed in a positive way. The *quantitative media analysis* shows that news reporting on “EU” and “Europe” on the *economy* are closely similar with 788 articles for the EU vs. 823 articles for Europe. Further, trade is an important economic sub-theme, and specifically in news about relations between Colombia and the EU and implementation of the Trade Agreement signed in 2013. Other visible sub-themes in the economy are sustainable agriculture, eco-tourism and the EU’s Green Deal which is of significant domestic interest.

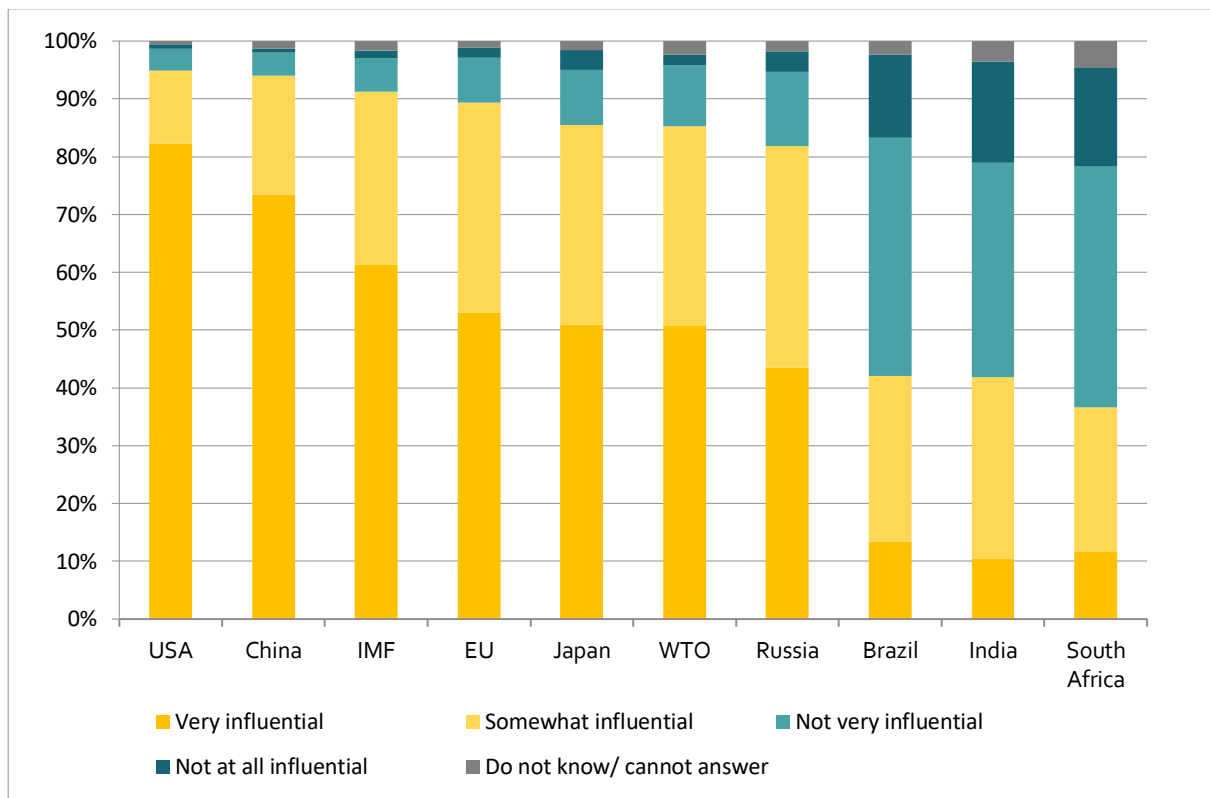
In *social media*, the theme of *Economy* occupies 28.6% of EU references and 19% of Europe references. Evaluation for the EU/Europe is mostly neutral (37.31%), followed by negative (32.8%) and positive (29.87%) emotive charges.

Students in the focus group consider the *economy* as the most important theme related to the EU, and for Colombia. For them, the EU is a role model in terms of economic development and well-being. Trade is an economic subtheme with perceived high importance for students since they consider the EU a leader in global trade – influenced also by the EU-Colombia Trade Agreement. Another prominent theme for students is the EU financial support to the post-conflict fund and support for local economic projects in rural areas.

National multipliers and influencers have mixed perceptions of the EU when it comes to the *economy* issue-area. They see the EU in a positive way as one of the global economic leaders, but when the EU's economic relationship with Colombia is considered, the EU is seen in a negative way and as taking an advantage of Colombia's precarious economic situation. In this scenario, the EU is seen as a partner who extracts resources rather than a cooperating partner who prioritises Colombia's economic development. The interviewees criticise protectionist conditions, an unequal relationship and urge a reconsideration of approaches when it comes to trade issues (mentioned by 2 policymakers from opposition parties and 2 members of civil society organizations). However, in general, the EU is considered by both key audience groups as an important global economic actor and a significant partner for Colombia's economy.

Among survey participants from the *broader public*, 54.3% associate the theme of *economy* with the EU, 28.2% with Europe, and only 4.8% mention that there is "no difference between them". More than half of the participants consider the EU a "very influential" actor in global economy (53.0%), but participants assign the US (82.2%), China (73.4%), and the International Monetary Fund IMF (61.4%) a more influential in the global economy. However, the EU is considered more influential than Japan (50.9%), WTO (50.8%), Russia (43.5%), Brazil (13.3%), South Africa (11.6%) and India (10.3%). Less than 7% find the EU to be "not very influential or not influential at all".

FIGURE 34. EU INFLUENCE IN GLOBAL ECONOMIC AFFAIRS COMPARED WITH COUNTRIES AND INTERNATIONAL ORGANISATIONS. COLOMBIA



Note: based on the answers to the survey Q6: In your view, how influential, if at all, in global economic affairs are the following countries and organisations? (n=1106)

Survey participants also consider the EU to be an important trading partner for Colombia: 40.1% agree with this statement and 41.6% agree on that “The EU is an important foreign investor in Colombia”. 49.7% “strongly agree” with that “the EU should have stronger economic ties with the country” although 32.7% of respondents also agree with the statement that “the European Union is protecting its market at the expense of others”, which brings a negative emotive charge.

Politics

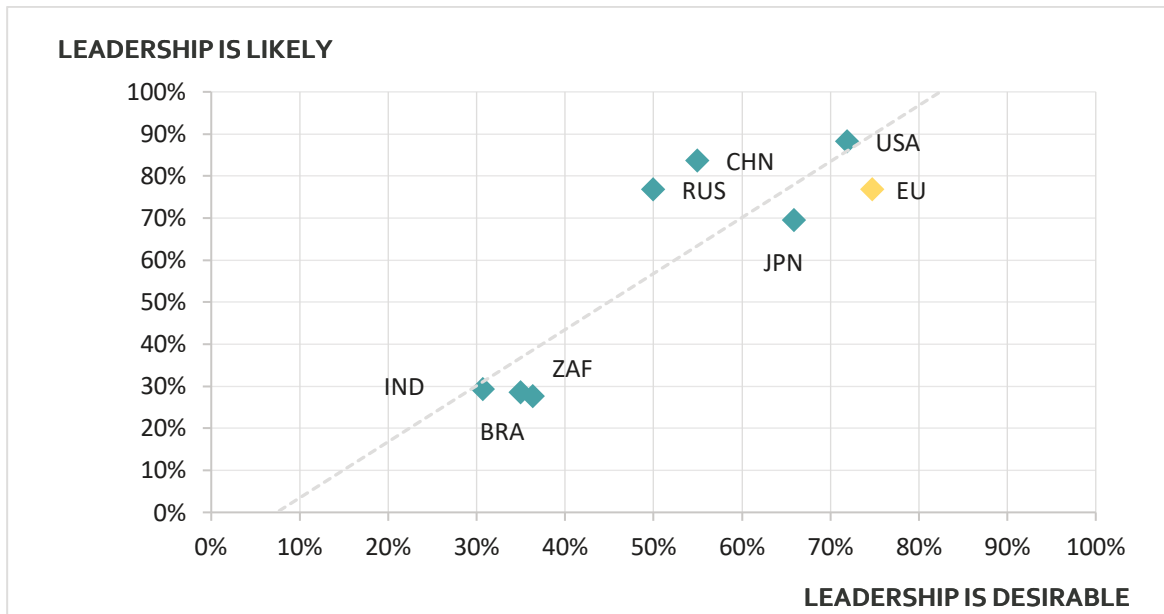
In the Colombian *press*, the EU’s internal politics is more visible than its external politics, except for those aspects of the EU’s foreign policy that are seen to impact Colombia. The qualitative analysis of the Colombian press shows that in the theme *politics*, the EU is more present with 748 articles than Europe with 649 articles. News media frame the EU as a political role model to emulate (integration process in particular) and report- on the EU in relation to regional cooperation. Finally, traditional media that report on the EU as a major topic, presents the EU as a highly relevant actor in the Colombian domestic political arena, specifically in the context of peace and human rights. This theme receives extensive attention and positive evaluation in press.

In *social media*, politics as a theme occupies a share of 21% for EU references and 12% for Europe references. The emotive charge on social media is more negative (42.29%), followed by positive (30.13%) and neutral (27.56%).

In the context of global leadership, 74.80% of *public opinion* participants considers that it is more *desirable* that the EU takes a strong leadership role in world affairs than the US (71.90%), Japan (65.90%), China

(55%) or Russia (50%). However, the US is considered more likely to take on this role (88.3%) than the EU (76.70%), China (83.70%), Russia (76.90%) or Japan (69.50%). Other countries such as Brazil or India are considered less than 30% desirable or likely to take this role.

FIGURE 35. DESIRABILITY VS. LIKELIHOOD OF EU GLOBAL LEADERSHIP. COLOMBIA



Note: based on Q4: How desirable is that each of the following countries and organisations take a strong leadership role in world affairs? And Q5: how likely or unlikely is it that each of the following countries and organisations will take a strong leadership role in world affairs five years from now? (n=1106) The horizontal axis presents the sum of “Very desirable” and “Somewhat desirable” responses to the Q4. The vertical access presents the sum of “Very likely” and “Rather likely” responses to Q5.

The surveyed public also agrees that the EU plays a “very important” role (59.5%) in maintaining global peace and stability, surpassed only by the US (65.9%) and the UN (65.8%) in this ranking, and followed by other international actors such as NATO (54.8%), China (53.7%) and Russia (53.1%).

As for political affairs, *public opinion* rates the EU positively in its performance. The EU is evaluated to be “very good” at fighting climate change and protection of the environment (35.5%) and media freedom (33.3%). In other categories the EU is evaluated to be “fairly good”: justice and rule of law (41.8%), peacekeeping operations (41.5%), foreign policy (39.2%), support for regional and international cooperation (38.4%), support to developing countries (37.0%) and fight against terrorism and radicalisation (36.8%). Negative perceptions marked by categories “fairly bad” or “very bad” are minimal and focus on dealing with refugees and displaced people (6.7% “fairly bad”).

Students consider the EU to be an important if not the international political leader. For students, other global actors such as the US and China, have greater political visibility, but, unlike the EU, these actors are sometimes perceived negatively or with reservations by young people. The students describe the EU as a fundamental international political reference at a global level, and with an outstanding political performance both within and outside its borders, also with an impact on Colombia and Latin America in general. The perception of high performance is clearly noticeable in student reflections of the EU’s actions in the support and promotion of Colombia’s Peace Process programmes. Youth show a particular perception of the EU as an actor who is highly committed to maintaining global peace and stability.

For *multipliers and influencers*, the EU is a political reference both in terms of its internal policies (due to its successful integration process) and its position in world politics. Similar to students, the interviewees do not consider the EU to be the greatest global political leader since other actors have much higher visibility in political and economic terms. Other actors, and specifically the US and China, and the permanent opposition between the two, seem to undermine the EU's visibility at the political level. Nevertheless, on the EU-Colombia political relationship, the interviewees consider the EU's objectives to promoting peace and stability through the support for the Colombian Peace Process as exemplary leadership.

Climate and environment

In the Colombian *press*, the theme of environment does not receive major visibility as a standalone issue: only around 5%-8% of EU-related news report on this theme. However, environment features frequently in conjunction with other themes such as the economy, social issues and energy and is framed positively. In Colombia, the *press* reports EU actions in the context of climate change mitigation, preservation of biodiversity in the country and sustainable agriculture that promotes economic development in rural areas.

In *social media*, environment is even less visible, with a share of 2-3% for both EU- or Europe-related references in the sample, but the assigned emotive charge is mostly positive (48.81%), followed by neutral (28.34%) and negative (22.83%).

For the *general public*, the EU (64.0%) together with the US (66.1%) and the UN (64.1%), are considered global actors that have a "very important" role in fighting climate change and protecting the environment, followed by China (58.4%), Russia (54.8%) and Japan (54.5%). Brazil, India, and South Africa are not considered as very important in this area. When evaluating the role of EU in fighting climate change and protecting the environment, the Colombian public finds the EU's role to be "very positive" (48.3%), together with the UN (52.0%), the US (48.6%) and Japan (41.8%).

For all *focus group* participants, the most positive perception of the EU is in the *environment* theme. They all recognise the EU as a global leader of policies and actions related to *climate and environment*, although even students of disciplines related to this field (e.g. environmental engineering) do not know of any specific EU policy in this field which indicates a deficit of information on and awareness and knowledge of the EU's policies including the Green Deal in universities and among youth.

For national *multipliers and influencers*, the actions of the EU in the issue-area of *climate and environment* establish norms and policies that Colombia can emulate. Interviewees mention that Colombia follows the Euro 6 Normative for public transport vehicles and motorcycles in Bogota and the target of net zero by 2050 as followed by the Ministry of Environment and Sustainable Development of Colombia. Interviewees also express desire for greater EU-Colombian cooperation on climate and the environment in the future.

Energy

In the Colombian *press*, the EU news on energy-related subjects do not attract major media attention: only 2%-3% of news report on it. This topic is typically a part of the *climate and environment* frame. Member States are more visible in news about energy than the EU, especially Germany, France or the Netherlands in the context of renewable energy. When the EU is reported in the field of *energy/ climate and environment* its actions are framed positively.

In *social media*, the share of *energy*-themed posts is also low for both EU- or Europe-related references, ranging between 1%-3% of the sample, yet with a largely positive emotive charge (43.68%) as opposed to negative and neutral (28.15% each).

Focus group participants do not have specific knowledge about the subject of energy and the EU. Their overall positive perception is based on general concepts of EU activity in the field of *climate and environment*. The interviewed *multipliers and influencers* also link EU actions in the field of *energy to climate and environment*. Similar to students, experts emphasise actions of some EU Member States (e.g. Germany, Italy, the Netherlands) in the field of renewable energy more than the actions of the EU as a whole.

Research, Science and technology

In the Colombian *press*, the EU as an actor in *RST* receives minimal attention. In some outlets, in articles that report on the EU with a major focus, *RST* is related to more general issues such as *climate and environment* or fighting the COVID-19 pandemic (several news articles report on the scientific studies carried out by the European Medicines Agency on the efficacy and adverse effects of vaccines). The theme of technology is also occasionally addressed in news reporting on the legal battles of the EU against digital platforms such as Facebook, Google or TikTok. The limited media coverage overlaps with the findings from the *public opinion* survey: 56.1% of survey respondents consider that the EU as “very important” in advancing innovation and technological progress in the world. However, China (80.3%), the US (77.1%) and Japan (73.3%) are seen by more respondents as “very important”. Other countries, such as Brazil, India and South Africa are “somewhat important” or “not very important” in this field.

Neither *focus group* participants, nor interviewed *multipliers and influencers* perceive the EU as an important actor in the field of *RST*. On the contrary, they believe the EU does not have any leadership in this issue area and is inferior to other actors such as the US, China, and Japan. Interviewees also think that EU Member States stand out more in this area vis-a-vis the EU as a bloc. Yet, both interviewed groups believe that this is an issue area that can be an attractive field of cooperation between Colombia and the EU in the future.

Development and assistance

Development receives minimal attention in *traditional media*: only 2%-3% of the analysed articles present the EU framed by this theme. But when *development* is covered, it often profiles the relationship of the EU with Colombia on issues with a “local hook” such as economic projects, sustainable agriculture, or ecotourism. Leading media highlight the direct impact of EU actions on the development of local communities. In *social media*, the topic of *development* is also mentioned in less than 2% of the sample.

On the contrary, students in the *focus group* believe that one of the issues in which they can relate to the EU is development. Students share a vision of the EU’s social development and well-being, and they emphasise the positive image of the EU in this matter globally. Students consider the EU’s actions in this field in Colombia to be highly visible, with a positive reception locally and with great impact on rural communities. Students also highlight EU support in the implementation of local economic projects that generate impact in local communities.

Interviewed multipliers and influencers also highly appreciate the level of economic and social development that the EU has reached despite the economic and social differences of its Member States. However, the image of the EU changes when the interviewees talk about *development* in Colombia as a result of the relation with the EU (seen through the lens of the Trade Agreement and international cooperation). Here a negative image of the EU appears in the context of a perceived ‘unequal economic relationship’, which does not allow Colombia to improve its performance. The respondents note only a moderate impact of the EU on the development of specific communities that receive contributions of the EU or in regions where products for exports to Europe are produced. On a national level, the interviewees do not see a significant impact of the EU on Colombia’s development.

Public opinion registers a perception of the EU as a “very important” actor in providing support to developing countries to eradicate poverty and building peace (53.3% of respondents) – almost on par with the US (55.7%) and UN (55.8%). The World Bank (47.8%) and Japan (45.9%), China (43.2%) and Russia (41.6%) are considered to play a very important role as well. Brazil, India and South Africa are not considered as very important actors in this issue-area.

Social

The leading Colombian *press* rarely reports on the EU and *social issues* and only around 10% of EU-related news cover this theme. In reports that focus on the EU in a major way, only two articles mention the actions of the EU in this field (one on climate activism by European youth and the other one on migration matters).

In *social media*, the distribution of social theme is also low for both the EU or Europe: only 7% reference the EU and 12% Europe. However, the emotive charge of the *social* theme in *social media* is largely positive (40.8%), followed by negative (36.41%) and neutral (22.7%).

In the *public opinion* survey, respondents assess the EU’s performance in areas of social development as good in general. The best-rated indicators (“very good”) are EU actions in the areas of education (50.7%), overall quality of life (44.5%), creating employment opportunities (36.6%), gender equality (30.9%), social justice and solidarity (30.7%), and climate change activism (30.7%). The EU is evaluated as “fairly good” in protecting minorities (35.6%), eradicating poverty (34.0%), the integration of migrants and refugees (35.3%) and reducing income inequality (33.1%).

For *students* in the *focus groups*, the *social* theme receives positive appreciation, especially where they see the EU to lead global efforts, such as in climate activism, human rights, social policy and eradication of poverty. However, when the very same issues are perceived through the lens of the current situation in Colombia, students expect a greater presence and activity of the EU. They also claim there is a lack of information on the actions of the EU in Colombia on these topics.

The interviewed *multipliers and influencers* recognise a high performance by the EU in the *social* theme internationally and describe the EU as a credible and respectable actor. When it comes to Colombia, they believe that the EU should increase its activities in Colombia in recognition of domestic priorities. Interviewees outline several social issues that seriously impact Colombians, including the murders of environmental activists, social inequality that has generated social upheaval in the country and the protection of members of social movements. They request a more extensive and direct approach towards Colombian civil society organisations, and less intermediation by the Colombian government from the EU.

For both key audience groups, education is a social issue in which there is no visible EU engagement, yet where the perception, despite a lack of information, is very positive. Education is another issue area where both cohorts wish for an increase of EU engagement in Colombia.

Culture

In *traditional media*, the theme of *culture* is rarely reported in EU-related articles. The “Europe” dataset has a significantly higher coverage of *culture* (19%) compared to the “EU” dataset (3%). *El Pais* focuses the most on *culture* in the “Europe” dataset. In the sample that deals with the coverage of the EU with a major focus, only one article mentions the cooperation of the EU with Colombia in this field (on a project that promotes audio-visual scenarios about the victims of the Colombian conflict).

In *social media*, the culture theme is more associated with Europe (18.8%) than with the EU (2%), and the emotive charge for both EU and Europe is mostly positive (48.8%).

The *public opinion* survey shows that the respondents see the EU as the most attractive location in terms of its culture and lifestyle: 67.4% consider the culture and lifestyle of the EU as “very attractive”, followed by Japan (59.8%) and the US (55.2%). In contrast, respondents assign descriptors of “not very attractive” or even “not at all attractive” to South Africa (27.8%), India (27.0%) and Brazil (24.7%). The low percentage in responses that “do not know/cannot answer” (between 0.3%-1.3%) shows that respondents have an opinion about the EU in this field. Survey respondents have a “very positive” perception of the EU in terms of its monuments and museums (55.5%), history (52.8%), modern architecture and design (51.5%), arts (48.4%), sports (46.4%), music (45.1%), lifestyle (44.1%), multiculturalism (42.7%), luxury goods and clothes (41.9%), theatre and cinema (41.7%) and food and cuisine (39.5%).

Interviewed *students and multipliers and influencers* repeatedly allude to standards of life and the lifestyle of the EU population. However, when it comes to the EU’s cultural issues in relation to Colombia, all participants consider that the EU’s actions in this field are not visible in any way if they take place at all. Both key audiences share a perception of an untapped potential. To interviewees, there is much to do and share in the cultural field to promote the social development of Colombians and strengthen ties with the EU’s nations.

Health

In the context of the global COVID-19 pandemic, *health* is a prominent issue in the Colombian news with extensive coverage of the EU/Europe in local *press*, occupying a share of 26% in the “EU” dataset and 23% in the “Europe” dataset. In focus are the approval of vaccines by the EMA, the EU’s vaccination campaign, the study of the adverse effects of vaccines from AstraZeneca, the EU’s ban on vaccine exports and the Digital Green Pass/COVID Vaccine Passport. The news presents the EU neutrally, although a negative emotive charge is observed in reports on the EU’s ban on vaccine exports.

In *social media*, the topic of health is associated with both the EU (36.9%) and Europe (32%), and the emotive charge is largely negative (44.78%).

However, the majority of *survey participants* see the performance of the EU in global health and medical research as “very good” (40.4% and 41.8% respondents accordingly).

For *students and multiplier/influencers*, COVID-related events in the EU or EU statements on the health issues, specifically on vaccines, are a guideline for Colombia in its fight against COVID-19. Outside of the pandemic context, EU-Colombian cooperation on *health* is not in focus for either students or interviewees. However, both groups consider that on *health* the EU has a broad range of instruments that could also help promote social development, poverty reduction, civil rights, and stability. This expertise is considered to carry a potential benefit for the Colombian population especially by politicians and members of civil society organisations.

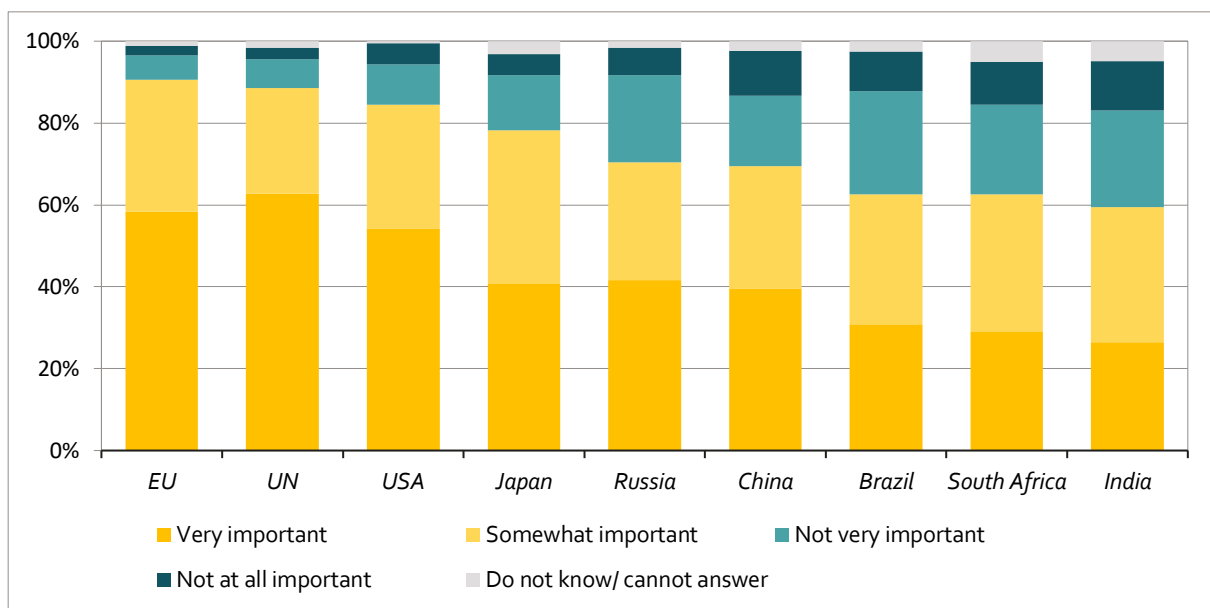
Continuity and change behind actorness

Although Colombia was not a part of the 2015 Baseline Study, the *Literature Review* and analysis of opinions of the key audience groups and news media demonstrate that overall, the EU is perceived as a very active actor who is increasingly consistent in its actorness. The highlights of the EU’s image in Colombia concern issue-areas of trade, peace and stability, democracy, international cooperation, and humanitarian issue-areas. Immediate crises may overshadow perceptions of the EU on areas where it is most positively associated. The increasing relevance of the EU in recent years is corroborated by an expressed desire for more cooperation between the EU and Colombia – especially by youth and experts – in the future.

1.4.4. The EU as a norm-setter

Assessing the *press* framing of the EU in the articles that report the EU with a major focus, the newspapers frame the EU as normative power across themes such as peace, democracy, human rights and sustainable development. These themes link to *location-specific* factors. The EU’s unwavering support for the pursuit of peace in Colombia is a visible and positively supported theme in the coverage of the EU.

FIGURE 36. PERCEPTION OF THE IMPORTANCE OF EU, OTHER ORGANISATIONS AND COUNTRIES IN GLOBAL HUMAN RIGHTS PROMOTION. COLOMBIA



Note: based on Q11: In your view, how important, if at all, 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? (n=1106)

On the specific theme of global human rights, *public opinion* considers the UN (62.7%) as a “very important” in promoting and defending human rights worldwide, follow by the EU (58.4%), US (54.1%), Russia (41.7%), Japan (40.6%), China (39.5%), Brazil (30.8%), South Africa (29.1%) and India (26.5%) . These results echo the perception of the EU’s role in maintaining global peace and stability (59.5% rate it as “very important”). Regarding convergence of values and norms between Colombia and the EU, 34.6% of survey respondents strongly agree and 38.1% agree that “The EU is a good example for Colombia in promoting equality between women and men”; however, 33.2% neither agree nor disagree in that “the EU shares the same democratic principles” as Colombia.

The *public opinion* survey also assesses perception on similarity of individual values with EU values. Colombian respondents describe their values as “definitely similar” or “more or less similar” for liberty (45.6%), respect for human dignity (43.7%), respect of human rights (42.2%), pluralism (41.8%), solidarity (39.7%), equality (38.9%), rule of law (38.7%), tolerance (38.6%), justice (38.4%), non-discrimination (37.5%), democracy (37.4%), equality between women and men (37.1%), and minority rights (35.7%). At the same time, the categories of “not very similar” or “not at all similar”, although not having high percentages (3.9%-19.5%), reveal that not all members of the Colombian society fully identify with EU norms and values or see a convergence.

Both *students and the multipliers/influencers* recognise the EU as a norm-setter on human rights, peace, democracy, and climate and environment. They see the EU as setting a clear and congruent guideline that resonates with Colombian values and interests in these themes. A major characteristic mentioned by the interviewees is the EU as a norm-setter in the rule of law. Some respondents even voice envy given the Colombian context.

Continuity and change behind EU as a norm-setter

Over the years and in different scenarios of cooperation and relations with Colombia, the EU has been considered a role model to emulate and a norm-setter to be followed. Colombian perceptions reveal an image of the EU as an actor who promotes values of democracy, freedom, human rights, justice and solidarity.

1.4.5. Continuity and change

Despite the deficit of studies of Colombia's perceptions of the EU over the previous years, the *Literature Review* and the 2021 *media analysis*, interviews with *key audience groups* (students and multipliers/influencers) and the *public opinion* survey indicate that Colombia's perceptions of the EU have been continuously positive throughout the years. While the EU is perceived as always having been an important international partner to Colombia it has become even more relevant since the EU's support for Colombia's Peace Process. The perception of the EU also compares favourable in many issue-areas to other international actors, even, the US or the UN.

The themes most associated to the EU in Colombia (for traditional media, public opinion and key audience groups), are *peace* (support to the peace process and post conflict process) and *trade* (2013 Trade Agreement Colombia-EU). The strong positive perception of the EU in Colombia refers mainly to the issues and actions around the Peace Process as well as the performance of the EU in the emerging issue-areas such as *climate and environment* (*global* and *EU-specific* factors, in combination with *location-specific* factors). A less positive perception of the EU is observed on the Trade Agreement specifically regarding inequities in the implementation of the Trade Agreement in the agriculture sector.

The EU's support and presence in Colombia is invaluable to national *multipliers/influencers and students*. It is for this reason that they call for a long-lasting active and visible presence of the EU in the country, to strengthen the relationship between the EU and Colombia. They also consider that the future perception of the EU in Colombia will remain positive, if the EU strengthens its ties with the country on new issues that are important to Colombia's national interests and if there is a correlation of the EU's objectives in Colombia with the realities of the country (e.g. the need to fight against poverty, environmental protection, post-conflict financing, protection of social and environmental leaders, protection of human rights).

1.4.6. Recommendations for EU public diplomacy

The analysis of the leading press frames of the EU, trends related to EU/Europe in social media, and perceptions of the EU among key audience groups and the broader public, demonstrate that the EU is perceived as one of the most visible international actors and positive acceptance in Colombia. The EU stands out in comparison to other international actors interacting with the country. The EU's aid provision and cooperation in the Peace Process and the Post-Conflict is recognised by different cohorts as a remarkable support with a major impact on Colombia in the present and for future relations.

In *Political* and *Economic* issue-areas, The United States is traditionally recognized as a more important actor than the EU. However, the importance that the EU has achieved in these issues in recent years is also recognized (thanks to political dialogue, support for peace and the Trade Agreement), despite more negative views on sector-specific aspects of the implementation of the Trade Agreement (agriculture,

mostly in the dairy sector). For Colombia, the EU is a role model to follow and is viewed most positively in every theme, but especially on such vital and important issues to Colombia as *Environment*, *Development* and *Social* (peace, human rights and democracy).

Most of the actions with the greatest impact and the highest budget are concentrated in specific rural areas (prioritized because those are former vulnerable and violent areas). Public diplomacy initiatives are, therefore, more focused on the periphery although some initiatives do take place in the capital.

Colombia is a populous country with an estimated 51 million people in 2021, projected to increase to 56 million people by 2050. Most of the country's population is in the Andean highlands and along the Caribbean coast (World Bank, 2020). It is a sparsely populated country despite its population size. Colombia – much alike other countries in the region – is concerned about an ageing population and has only few years to benefit from a demographic dividend (IMF, 2018).

Research, Science, and Technology is a topic of worldwide relevance. Public diplomacy actions in research, science and technology, health and culture remain particularly relevant considering the global pandemic and should receive continued attention, especially to increase the visibility of ongoing initiatives and work. Expanding initiatives in the cultural sector can also strengthen civil society in Colombia, consolidate the peace process and consolidate a trusted and trusting partnership between the EU and Colombia. These themes also carry significance because they link to the priority areas for public diplomacy outreach identified based on the research of the Update Study as carrying significant potential for strengthening and broadening existing and expanding to new public diplomacy initiatives.

Economy

The EU is recognized as an important economic actor in Colombia. Public diplomacy engagement in this field carries further potential beyond what has already been advanced in respect to activities related to the Trade Agreement not least to address some more negative issues on sub-themes related to the Trade Agreement such as views held by the dairy sector.

Policy aims

- Increase the visibility and sustainability of existing work to advance the EU's position as a central economic partner to Colombia especially in areas yet largely unaffected by the EU's public diplomacy efforts.

Medium- and long-term steps

- Ensure close cooperation and coordination on the implementation of the Trade Agreement;
- Ensure regional and cross-country awareness of the EU's economic role in Colombia;
- Expand the scope of EU actions in the field of the economy and open possibilities for new trade pathways, sectors, businesses and products;
- Create tools and connection channels that promote the export to the EU of the outcome products from the financed projects;
- Expand networks of stakeholders including new and prioritized territories.

Short-term practice-oriented suggestions

- Identification of already prioritised and unaffected regions, (local) stakeholders and associations in areas such as autochthonous crafts, cultural or recreational tourism, ecotourism, eco-sport practices and the gastronomy;
- Mapping and coordination of development and economic projects and partners;

- Training of project partners on best practices and capacity-building on export to EU;
- Creation of an easily accessible Q&A link for more available information.

Whom to involve from key audiences

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

Political

The EU's political visibility can be improved by demonstrating advantages in comparison to other international actors with influence in the country (e.g. US). The EU-Colombia Political Dialogue has been a fundamental tool to build relations. This tool should continue and can be strengthened and enriched. New political actors in Colombia are gaining strength and must also be considered for future EU's actions in the country.

Policy aim

- Establish a permanent dialogue with traditional and new political actors to support and promote democracy, peace, security, human rights, and rule of law through a trusted and mutual political partnership.

Medium to Long Term

- Connect political groups and civil society in Colombia with their peers in the EU, for knowledge-sharing and best practices;
- Expand the current High Level Political Dialogue mechanism between the EU and Colombia by topics and increase frequency of exchanges on senior and working level;
- Connect with other/new political and civil society actors e.g. opposition parties, new political parties, youth political organizations, students organizations, women political groups, minority organisations, etc. through thematic roundtables and workshops;
- Create spaces for dialogue and exchange of experiences (e.g. thematic virtual meetings, workshops, political debates) between other/new political and civil society actors.

Short-term policy-oriented suggestions:

- Continue the political dialogue with Colombian government but also with new political and civil society actors;
- Continue to communicate to the Colombian national government the EU's support for the peace process.

Whom to involve from key audiences

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

Development

Development is an issue of great importance for Colombia and in which the EU can improve its public diplomacy actions with potentially high impact and visibility. Activities must be based on a mutual and trusted framework and require alignment with needs identified in dialogue and the on-the-ground reality of the country.

Policy aims

- Continue and strengthen humanitarian assistance to improve development in Colombia, improve EU visibility in this field and establish a trusted partnership between the EU and Colombia.

Medium- to long-term steps

- Expand the portfolio of EU priority issues in *development* to include disaster relief, disaster management, food security, sanitation, sustainable development and social development and build strategic outreach programmes and campaigns;
- Integrate climate adaptation into development policies;
- Focus development projects on vulnerable populations (e.g. alleviation of poverty), towards specific groups such as ethnic and racial minorities, at the rural level and in the cities;
- Establish *development* as a cross-cutting objective for all EU actions/projects in Colombia while blending themes to ensure cross-thematic links by establishing multi-year formats and programmes;
- Highlight diversity and inclusion – especially of minority groups – as a crucial element of peacebuilding, and democracy.

Short Term:

- Continue humanitarian assistance to support internally displaced people in Colombia;
- Include development priorities in the agenda of bilateral dialogue with the Colombian government;
- Create thematic roundtables with the government and local organizations that are directly impacted by development issues and ensure that the need identification for ongoing priorities emerges from a mutual dialogue between these stakeholders;
- Create joint initiatives with spokespeople of displaced populations while embedding these initiatives in social media and media campaigns;
- Establish a working group of a diverse range of stakeholders that serves as a “critical friend” and advisory body to public diplomacy engagement and outreach;
- Continue the current channel of communication and international cooperation with the Presidential Cooperation Agency (APC);
- Map target groups and geographical priority areas by drawing on national databases of geographical development, geographical development needs, demographic data of minority groups, information from civil society organizations and rural political and social organizations;
- Increase capacity building, knowledge and best practice sharing to support sustainable development modelling, climate risk reduction and long-term development goals.

Whom to involve from key audiences

Political, economic, and civil society organizations 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; Ministry of Foreign Affairs, Ministry of Defense, Ministry of Health and Social Protection, National Planning Department (DNP), Presidential Cooperation Agency (APC)

Social and research, science and technology (education)

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

Policy aims

- Establish a close and trusted partnership with universities, students and educational institutions in cities and regions;
- Increase the EU's visibility and recognition in the social/research, science, and technology field.

Medium to Long Term Steps

- Expand the dialogue and activities to a target group of universities to other cities or regions;
- Expand the dialogue and activities to a target group of students from other careers different from those already prioritized by the EUD (in environment, social issues, education, health, energy, development, culture, RST);
- Strengthen academic ties with universities already known at the national level, and also with technical education institutions related to EU priorities;
- Encourage and facilitate EU/Colombian, EU Member State/Colombian research projects on priority research areas;

Short-term practice-oriented suggestions:

- Increase visibility and communication outputs for EU information on educational issues (programmes, scholarships, support) through the EUD and its communication spaces (website, social media, traditional media, press communications);
- Establish regular and frequent exchange formats with EU Member States to provide a common and concerted communication framework on student exchanges and institutional collaboration;
- Invite city and regional stakeholders from different educational institutes as "ambassadors" for their geographies and conduct a series of workshops to map and identify strategies and needs of stakeholders on how to improve EU support for education, research, science and technology;
- Increase joint activities, more thematic summits, academic exchange, etc., and replicate these actions/connections (as much as possible) with new universities and technical institutions in the country;
- Map and reach out to universities and technical institutions in Colombia that offer courses related to EU priority issues and increase frequency of communication through classes, webinars, book fairs, conferences, educational fairs to promote the EU's activities in the field of education;

- Promote and include university fairs in roadshows and webinars format;
- Improve the access and visibility to information about the EU's Erasmus Programme and other EU educational activities on the website of the EUD with direct links to future related events.

Whom to involve from key audiences

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

Climate and Environment

Environment is a vital issue for Colombia and the EU's leadership and role as a norm-setter is positively recognised and encouraged. However, the EU's visibility in this area remains limited while significant potential in this area exists.

Policy aims

- Connect the concept of a just and inclusive transition to democracy, peace and human rights and support a socially inclusive energy transition in Colombia
- Increase the visibility and influence of the EU in climate and environment to support Colombia's decarbonisation leadership in the region, increase resilience to Colombia's climate vulnerability and protect its vast areas of outstanding natural ecosystems

Medium- and long-term steps

- Support and cooperate on Colombia's green, inclusive and rapid economic recovery
- Support Colombia's regulatory and policy framework to accelerate fossil fuel divestment and phase out and consider supporting mechanisms to help fossil fuel retirement, de-risk renewable energy investment and support best practice sharing on avoiding stranded assets;
- Map and coordinate ongoing climate and environmental projects carried out by development partners to avoid duplication and establish the EU as a coordinating partner that adds value to a particularly complex landscape especially where Colombian capacity in government might be stretched;
- Provide a more permanent support (political, technical, economic) to climate, environmental and climate vulnerable civil society organizations in the country. Draw on EU Member State cultural institutes to increase outreach and audiences;
- Develop a clear and consistent narrative, supported by domestic ambition and action, on the EU's commitment to net zero and the Green Deal and weave it into public diplomacy efforts of the EU Delegation and Member States;
- Connect to other EU Delegations in the region and establish cross-country/regional public diplomacy initiatives to support regional leadership and increase pressure on regional laggards. Promote the financial support available.

Short term practice-oriented suggestions

- Increase the visibility of EU activities in Climate Change and Environment by publicizing EU activities in traditional and new media channels;

- Hold frequent dialogues to bring together government, development partners, civil society, youth, businesses, public and private investors to encourage a cross-societal consensus on inclusive and just energy transition;
- Establish a bi-annual development partner coordination meeting to track and review existing support for Colombia's climate and environmental policy and to identify where additional support may be required;
- Hold frequent investor roundtables with investors, government and development banks to identify opportunities for Colombia to access larger international finance to support its decarbonization, smart power transmission and distribution infrastructure;
- Publicize EU policies and strategies on Environment and Climate Change, for government institutions (ministries and local authorities), national economic and social organizations, universities/technical institutions, and rural social and economic organizations, especially the EU's Green Deal;
- Hold city-based and regional workshops in universities and schools with national experts, influencers and EU experts;
- Organise EU-Colombian Green Recovery events to provide a platform for exchange on sustainable development;
- Convene a social media influencer meeting together with environmental journalists from Colombia and the EU to share best practices on how to increase audience attention and how to report and influence on climate and environment;
- Convene monthly climate/political/economic EU Member State Counsellor meetings to streamline EU Delegation and EU Member State Embassies on EU Green Deal narrative and to coordinate ongoing projects and future work.

Whom to involve from key audiences

National and local environmental and climate organizations; 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 climate vulnerable; regional corporations; traditional local and national media; development partners; Ministry of Environment and Sustainable Development, Ministry of Education

Health

Health is an issue with little PD action in Colombia (or it is very likely that nothing is known), and today it is an issue of immense need at a global level but even more specifically in Colombia both due to the pandemic and due to the deficiencies that the health system has.

Policy aims

- Build knowledge exchange between Colombia and the EU;
- Enhance the innovation, research and development and health sector in Colombia;
- Promote ongoing and new activities between public and private institutions within the EU health sector and their peers in Colombia, at national and local level to increase visibility and raise awareness;

- Demonstrate the EU as a strategic and supportive partner to Colombia and a strategic partner in the region in the fight against COVID-19.

Medium- to long-term steps

- Support the health sector (universities, national and local health institutions, laboratories, and health research centers) through knowledge exchanges in science, research and technologies applied to the health sector, with public and private organizations within the EU and Colombia;
- Exchanges best practices and strategies in health between Colombian public and private institutions, and their peers in the EU;
- Support a socially inclusive and green economic recovery from COVID-19;
- Support the Ministry of Health on regulatory and policy framework to address the pandemic and on health policy.

Short-term practice-oriented suggestions

- Support the vaccination process against COVID-19 in Colombia;
- Exchange of best practices on vaccine disinformation and disseminations;
- Support to increase availability of vaccines to immunize the population and export vaccines against COVID-19 to Colombia;
- Establish permanent communication between Colombia's and the EU's medicines agencies (INVIMA and EMA) to exchange on guidelines and strategies to face the pandemic.

Whom to involve from key audiences

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

Culture

Culture is a valuable element in approaching the Colombian public and it is a potential area that the EU Delegation could explore more as repeatedly expressed by most of the interviewees in the study.

Policy aims

- Promote artistic, cultural and sports exchanges between Colombia and the EU on an economic and technical level to improve mutual understanding and dialogue between both partners.

Medium- to long-term steps

- Promote cultural exchange formats by connecting diverse cultural stakeholder groups from Colombia to the EU, and vice versa;
- Identify a new focus group of universities/technical institutions and its students of careers related to culture (e.g. plastic arts, music, sports, literature, languages, visual arts, architecture, dance, digital arts, design approaches), cultural organizations (arts, sports, music, literature, architecture), and cultural influencers at the national and local level;
- Establish more frequent work streams together with government institutions and universities or cultural organization on an economic and technical level.

Short-term practice-oriented suggestions

- Create of spaces to promote cultural diversity in different areas (e.g. artistic, sports, musical, literature) in the country and increase strategic communication accompanying these initiatives including on social media platforms;
- Focus on relationships with new key target groups at universities / technical institutions and its students, cultural organizations, and cultural influencers, through activities (in-person or virtual) to exchange ideas/knowledge/experiences about culture, academic support;
- Host roundtables between organizations, and increase accessibility of information on programmes, scholarships, projects, actions, cultural exchange spaces) on the EUD web page, social media, traditional media and university media outlets.

Whom to involve from key audiences

Universities/technical institutions and students of degrees related to culture; Cultural organizations at the national and local level (arts, sports, music, literature, architecture, etc.); Cultural influencers; Ministry of Culture; Ministry of Sports; EU cultural organisations; EU Member State cultural institutes; Regional cultural organisations and NGOs.

1.5. India

This Country Chapter presents a synthesis of the India-specific findings of traditional and social media analyses, interviews with multipliers and influencers, focus groups with university students and public opinion poll – all conducted in the framework of this study. The chapter follows the logic of the research design. We present the main findings for India according to indicators guiding the 2021 Study: visibility; actorness and local resonance; and norm-setting. We also discuss findings according to the themes analysed in this study: economy and trade; political issues; development; social issues; climate and environment; energy; science, research and technology; culture; education; and health. The penultimate section looks at the local conditions and drivers that explain the perception of the EU and Europe in India. We conclude the chapter with recommendations for the EU's public diplomacy in India.

Summary

Overall, the EU in India is perceived as an actor of low significance in geopolitical terms, but of high significance in economic terms. Its perceived influence ranges from positive to neutral depending on the themes involved. The areas where the EU is *considered* to have had the most impact over the past few years are climate change, energy and education. The areas where the EU is *expected* to have the most impact in the near future are development, health, connectivity, and science and technology. The literature on the perceptions of the EU focuses instead on security, connectivity, the Indo-Pacific region more broadly, the Belt and Road Initiative (BRI), energy and Brexit. Although the pace has been slow in some areas such as security and defence, the EU has been gaining visibility since the 2015 Baseline Study due to a perceived greater engagement in areas of India's interests. The aspects of the EU's image, which have become now most visible according to the surveys, are the EU's strength as an economic power and its potential to become a global leader in maintaining global peace and stability. Indian experts and students also confirm that the EU has become more important to them over the past few years especially in the field of climate change, energy, trade, and in relations to norms and values. However, the EU still retains a weaker visibility when compared to its individual Member States. The media further highlights the EU's greater presence and strategic involvement in dealing with global contemporary issues such as the pandemic crisis and the vaccines.

1.5.1. Sample

Public opinion

The online survey was coordinated and conducted by PPMI through an online panel provided by Syno International. The respondents in India were surveyed in English, Kannada, Bengali, Hindi and Tamil. Data collection took place between 28 April and 16 May 2021. The sampling for the survey was designed to be nationally representative of age, gender and regions. The respondent profiles in India were established based on data from India's Office of the Registrar General & Census Commissioner.¹³ The survey received a total of 1,145 responses from individuals aged between 15 and 64 years old¹⁴.

Media

The quantitative media analysis focused on five popular prestigious dailies *Hindustan Times*; *The Telegraph*; *The Times of India*; *The Hindu*; *Indian Express* and one business newspaper *The Economic Times* – monitored from 1 February to 30 April 2021. The *Factiva* repository was used to aggregate content from both licensed and free sources, and in-house data processing was applied to produce the results.

The dataset consists of two parts, collected in English during the observation period: the “EU” dataset (736 articles) and the “Europe” dataset (2,248 articles). Search terms for the dataset “EU” are: “European Union”, “EU”, “European Commission”, “European Parliament”, “Court of Justice of the European Union”, “EU presidency”, “EU Council”, “European Council”, “Council of the European Union”, “Eurozone”, “European Central Bank”, “European Investment Bank”, “European Medicines Agency”. The search terms for the dataset “Europe” are “Europe”, “European” and “Europeans”. The search terms for “EU” and “Europe” datasets consider both plural and singular forms as well as possible grammatical forms of the search terms in the local language. Europe dataset excludes articles containing any of the “EU” dataset keywords.

The qualitative media content analysis of the news that reported the EU as a major focus/theme in the observed period (32 articles) was designed, supervised and coordinated by experts from Public Diplomacy and Political Communication Forum (PD-PCF), University of Canterbury (UC), New Zealand, and conducted by Country Experts trained by the PD-PCF UC. PPMI collected the media sample using the search engine for the in-depth qualitative content analysis from two prestigious newspapers *The Times of India*, *The Hindu* and one business newspaper *The Economic Times* for the Country Experts to carry out the analysis. The timeframe of observation remained the same as for the quantitative and social media analyses. Country Experts analysed the EU image created by applying elements of content, cognitive and critical discourse analyses.

Social media

PPMI carried out the social media analysis. The data collection process was automated using the online social media monitoring tool *Mediatoolkit*. Social media posts were collected from Twitter, Facebook, and Instagram with the use of automated queries. Coverage of the EU was traced using a set of the EU-related keywords: “European Union”, “EU”, “European Commission”, “European Parliament”, “Court of Justice of the European Union”, “CJEU”, “EU presidency”, “EU Council”, “Council of the European Union”, “European Council”, “Eurozone”, “European Central Bank”, “European Investment Bank”, “European Medicines Agency”. All the keywords were additionally traced in one-word format to capture related hashtags: europeanunion, europeancomission, europeanparliament, courtofjusticeoftheeuropeanunion, eupresidency, eucouncil, europeancouncil,

¹³ India's Office of the Registrar General & Census Commissioner: <https://censusindia.gov.in/>

¹⁴ Detailed public opinion survey data are available in Annex II of this Report – Comparative public opinion survey report.

counciloftheeuropeanunion, europeancentralbank, europeaninvestmentbank, europeanmedicinesagency. Europe-specific keywords used for filtering relevant social media posts are “Europe” and “European”. Europe dataset excludes posts containing any of the “EU” dataset keywords. Additionally, the mentions were filtered through a location filter to ensure that the collected mentions originate from India. A language filter was set up to collect posts in English and Hindi. The sample of Indian social media posts collected from 1 February to 30 April 2021 includes 152,162 mentions, of which 55,236 are of the EU (2.5% in Hindi) and 96,926 are of Europe (17.4% in Hindi).

Working with social media platforms, the Project Team followed each platform’s terms of use. All identifiable information of individuals from social media data remains confidential and is removed before publication of findings. Computational analyses of the large number samples involve only contents from media databases’ public websites and non-private social media accounts – that is, posts that are available to public audiences. No generalised conclusions that might cause any potential harm will be drawn from social media analyses on identifiable communities.

Interviews and focus groups

Interviews with local opinion- and decision-makers as well as focus groups with students were conducted by the Country Experts, with training support and supervision from PD-PCF, UC, following the approval of the UC Human Ethics Committee. As part of this study, interviews and focus groups aim to provide in-depth explanations about Indian perceptions of Europe and the EU and cross-reference the findings from the public opinion survey, traditional and social media analyses.

Two focus groups with university students were held on 22 and 23 March 2021. These were attended by nine students aged between 22 and 25 years (3 females and 6 males) of diverse disciplinary backgrounds (history, linguistics and literature, philosophy, international relations, political science, geology, and economics) pursuing graduate degrees. All of them are aware of the EU or have friends coming from European countries. Two have personal experiences with Europe because their extended family members live in Europe. One participant studied in the Netherlands and the UK.

Twelve interviews with experts and decision-makers ((2 female and 10 male)) were carried out between the 20th of April and the 15th of June 2021. The questionnaire for the interviews was designed by the Core Team (PD-PCF UC and PPMI) following the 2015 Baseline Study for comparative analysis. The interviews were conducted by the Country Experts in English. Interview respondents had moderate to high levels of understanding of international affairs in general and of the EU in particular. Some of them were professionally engaged with Europe, either in their capacity as professor, researcher, policymaker, former ambassador or bureaucrat having direct or indirect experience in dealing with matters pertaining to Europe and international affairs. The sample includes experts from local academia (2); media personalities and influencers (2); researchers and think tankers (2); officials, practitioners and policymakers (3); representatives of the Ministry of Culture and of Foreign Affairs (2); and of the business community (1). Due to the pandemic, the one-hour interviews were conducted mostly online on Zoom or Google meetings, under the Chatham House Rule, whilst two interviews were conducted in-person in New Delhi.

Our interviews and focus groups samples provide an in-depth insight into the attitudes of Indian influencers and youth towards the EU, but they are not representative of all Indian decision-makers and students due to the limited size of the sample.

Semi-structured, anonymous qualitative group interviews under Chatham House Rules were conducted with all EU Delegations across the 13 key partner countries. The interviews lasted between 60 to 90 minutes. The group interview with representatives of the EU Delegation to India was conducted

in March 2021 by the members of the Core Team (PD-PCF UC and PPMI) and the Country Expert Team Leader.

1.5.2. Visibility

The public opinion survey is a critical measure to assess the EU's visibility among the wider public. The general awareness of the EU among the Indian respondents is rather low when compared to other countries and international organisations: 2.8% of respondents "do not know" about the EU as opposed to 0.5% about Japan, 0.8% – the United Nations or the US, 0.9% – Russia, 1.7% – China and 2.3% – South Africa. Regional groupings such as Association of Southeast Asian Nations (ASEAN) and MERCOSUR are, however, less visible than the EU (3.2% and 9.3% of "do not know" responses respectively). Altogether this shows a limited recognition of the EU compared to other players – which is similar to the 2015 findings. However, there is a clear improvement in direct awareness since the percentage of people not knowing about the EU is reduced by half in 2021 (2.8% against over 6% in 2015).

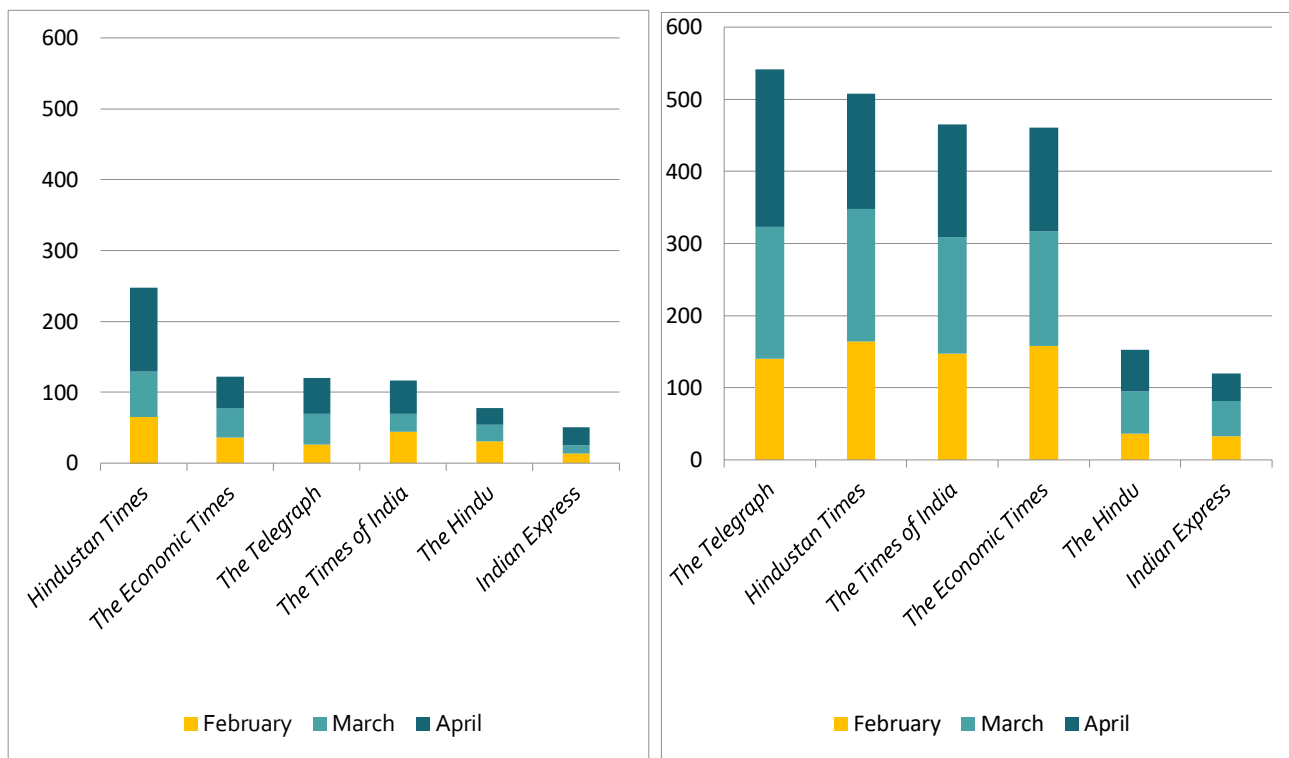
The respondents describe the EU in generally positive terms: as modern (55.6%), efficient (50.6%), strong (47.9%), and peaceful (45.4%). However, more respondents view India and Japan as efficient (57% and 59.6%) and peaceful (64.7% and 57.9%). The EU is seen as lagging the US (73.3%), Japan (69.4%), and Russia (55.8%) in terms of modernity as well as India (62.5%), Russia (61.2%), Japan (57.8%) and the US (56.9%) in terms of strength. Indians also see India more united, multicultural, and trustworthy than the EU (52-57% vis-à-vis 26-37%). On the other hand, the EU is rarely described in negative terms either: qualities such as aggressive (15.4%), arrogant (6.7%) and hypocritical (11.1%) are assigned largely to China (42.1%; 40.9% and 33.0% respectively). The US and Russia are also considered aggressive more frequently than the EU (over 20% in both cases against 15.4% for the EU). In order of importance, the areas where EU activities are perceived as "very good" are science and research (59.8%), industrial development (57.6%), development of new technologies (57.7%), tourism (55.6%), financial services and banking (54.5%), global trade (53%), entertainment industry (53%), medical research (52.6%), high-quality food industry (51.1%) and global health (50.7%). By contrast, research and science received 100% positive evaluation in the media reporting in 2015, the development sector a 100% neutral tone and social and cultural issues also a predominantly neutral emotive charge. In 2021, EU activities in the fields of space exploration technologies and green technologies and sustainability receive more "very bad" (1.3% against 1.14% in 2015) and "do not know" (4.2% and 4.7% respectively) responses.

Without pre-empting further details about the media analysis and the more specific discussion to follow, the respondents of the survey reveal a rather strong exposure to the EU through the media: 72.5% of respondents read or hear about the EU either every day or once a week (35.8% and 36.7% respectively). The print media coverage of the EU news is generally greater than in 2015 (practically every day in 2021, especially related to sports in the quantitative media analysis). Moreover, the theme politics, which amounted to barely 6% in the 2015 media sample has increased to approximately 27% in the 2021 one. In the last five years, the Indian media projection of the EU appears to have a slight upward trend, but the media also cover a broad range of issues with a greater involvement of regional and global actors. Europe is referenced far more often (over twice more frequently) than the EU in the observed period from February to April – especially in *The Telegraph* and *The Hindustan Times*.

Among all traditional media outlets, the degree of centrality for EU articles is overall low among all traditional media outlets, except for *The Telegraph* where 22.5% of articles reference the EU as a central topic. A low degree of centrality in the 2021 quantitative sample (varying between 13% for *The Hindustan Times* and 5% for *The Hindu*) reveals that Indian newsmakers do not profile the EU and its institutions as the main actors in the news story – a trend like the one observed in 2015. Timewise, the EU's visibility is higher in April, except for *The Hindu* (highest in February). The EU got prominence mostly during

the visit of EU parliamentarians to Jammu and Kashmir, the Raisina Dialogue and the EU-India Summit in May 2021 whilst more region-focused issues remained uncovered.

FIGURE 37. VOLUME OF NEWS ITEMS WITH A REFERENCE TO THE EU AND EUROPE IN TRADITIONAL MEDIA. INDIA



Note: based on automated quantitative data analysis. Includes press articles which report on the EU and Europe as a principal or secondary subject of the article.

Our qualitative traditional media analysis that focuses on the stories that reported the EU as a major focus reveals that *The Economic Times* has the highest coverage of the EU in the sample (15 articles), followed by *The Times of India* (13) and *The Hindu* (4). In this sample, media focuses on the EU as the main topic of report in the context of EU-India trade relations, joint projects at the regional level and bilateral cooperation, as well as the EU’s internal politics, the vaccine rollout, the Green Deal and cyber-security. The EU-India FTA process is framed as highly bureaucratised. Reports of the negotiations do not convey a very positive image of the EU, but at the same time the Indian media is optimistic about getting the deal closed.

Most of the articles from the qualitative media analysis are of average length and the news about the EU is placed in a range of different sections, e.g. “world news”, “top stories”, “business news”, “India news” or “foreign trade”. The most visible news items tend to discuss investments and technology, the EU’s involvement in the Indo-Pacific region as well as security (located under the rubric “world/foreign news”). Other news on bilateral negotiations and vaccines received less visibility and appear on the side columns of the printed editions. Like the findings of the 2015 Study, this points to somewhat “muted” visibility of the EU in the leading national press.

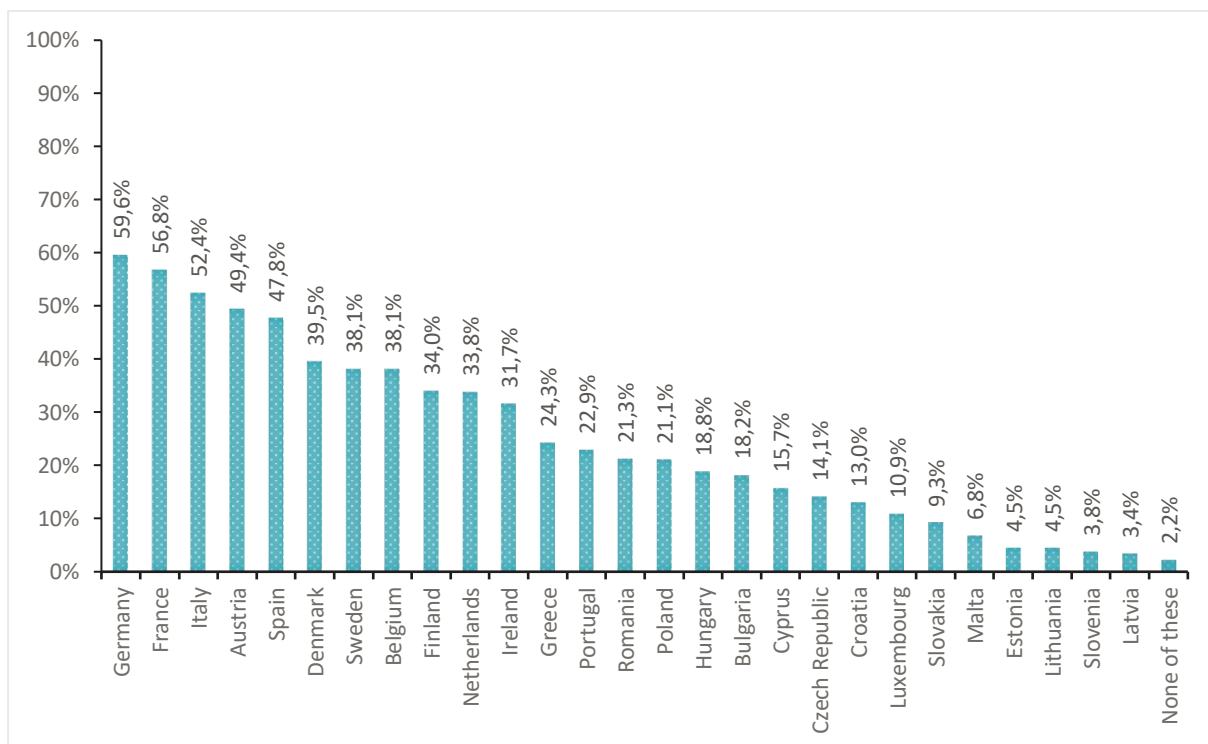
Similar to the press, Europe’s visibility in *social media* is higher than that of the EU. In the *social media* analysis, the peak in Europe-related posts happened on 19 April; it is linked to the discussion around

the creation of the European Super League. Another peak – on 24 April – is generated by retweet activities related to a post about the prices of vaccines, which was claimed to be the most expensive for India, and the cheapest for the EU. A large part of retweets dismissed this claim as fake news. Given the pandemic, the prices of vaccines are also one of the prime reasons for the peaks in the month of March, together with media coverage of the EU's joining Modi's Coalition for Disaster Resilient Infrastructure, the Chandigarh Water Project or the upcoming Raisina dialogue in India which took place the month after and the visits to India of EU trade Commissioner Valdis Dombrovsky.

Visibility of EU institutions and EU leaders. Visibility of Member States and their leaders

In both the "EU" and "Europe" traditional media (press) datasets for India, the European Medicines Agency is mentioned the most amongst EU institutions (in the EU sample - 63 times). The leading press pays slightly less attention to the European Commission (49), and even less to the European Central Bank (20), European Parliament (17), European Council (17), European Investment Bank (2) and the EEAS (1). This is of course reflecting the context of the current pandemic as compared to the 2015 Study when the European Commission and the European Central Bank led in the reporting. In 2021, EU institutions such as the European Council, European Parliament, European Central Bank and EU Trade Commission are also the most visible in the news that report centrally on the EU. Accordingly, the most visible EU officials are the European Commissioner for Trade Valdis Dombrovskis, and the EU Ambassador to India Ugo Astuto. Differently, in Indian *social media*, the European Parliament is the most visible EU institution with 115 mentions. The European Commission (21 mentions), European Council (7) and European Medicines Agency (6) follow. This is further intertwined with a higher visibility of Ursula von der Leyen (649 mentions) compared to Charles Michel (149) on social media.

EU Member States generally remain highly visible in the news about the EU. France and Germany are the most frequently mentioned in the press (180 and 196 mentions respectively vis-à-vis 111 for Italy, the next most visible Member State) and so are their respective leaders. In the qualitative sample, Germany and France are often cited positively in the context of bilateral trade and the Indo-Pacific mostly because of their comprehensive strategic approach in the region. In the quantitative sample of EU news, several other countries are mentioned more often compared to other countries: in particular Portugal (59%) and Sweden (50%). The Netherlands and Sweden were also specifically visible in two different contexts. According to the qualitative analysis, the Netherlands gained prominence with regards to bilateral trade and the Indo-Pacific, whereas Sweden figured in educational exchanges at school level (metropolitan cities). Portugal is further mentioned in the context of the India-EU Summit in May 2021. Finally, each Member State is mentioned within the corpus of Indian social media posts. In the context of the EU vis-à-vis European news, France (8,081), Germany (4,642), Denmark (2,165) and Italy (1,741) feature the most on social media. The number of mentions of EU Member States in traditional and social media correlate with the attractiveness of each Member States as measured by the public opinion poll. As opposed to 2015, Greece is less visible in 2021 because its presence in the Indian media five years ago was linked to the Greek debt crisis.

FIGURE 38. ATTRACTIVENESS OF THE INDIVIDUAL EU MEMBER STATES. INDIA

Note: based on Q25: Please indicate which European countries look the most attractive to you? Respondents could choose more than one country (n=1145). Respondents were not limited in the number of countries they could name.

During the focus groups, the students highlight that the EU has a rather weak visibility and significance when compared to other international organisations such as the ASEAN, Bengal Initiative for Multi-Sectoral Technical and Economic Cooperation (BIMSTEC), Brazil, Russia, India, China, South Africa (BRICS), United Nations, South Asian Association for Regional Cooperation (SAARC) and Quadrilateral Security Dialogue (QUAD) (India, the US, Japan, Australia). India-EU relations are most visible and appreciated from a positive perspective in the field of energy and climate change. In other areas, the EU is generally perceived as ineffective and/or invisible. Interviewed multipliers and influencers further mention QUAD and the UN as the most significant international organisations for India. In this context, most experts identify the EU as being primarily a trade power and partner but second to its Member States in terms of actual impact in India. Unlike the youth, who to some extent recognise the geopolitical and strategic significance of the EU, most interviewed experts reveal reservations about the EU's strategic role globally albeit recognising and emphasising its growing role regionally. Almost half of the experts further mention the key role that the European Investment Bank could further play in seeking to help India's development. In 2015, the EU was already seen as playing a core development role globally as compared to China, Brazil and Russia. However not much was reported in relation to India. Since then, the EIB has grown to be seen as a more significant institution extending its support to many Indian developmental projects, such as the Lucknow metro.

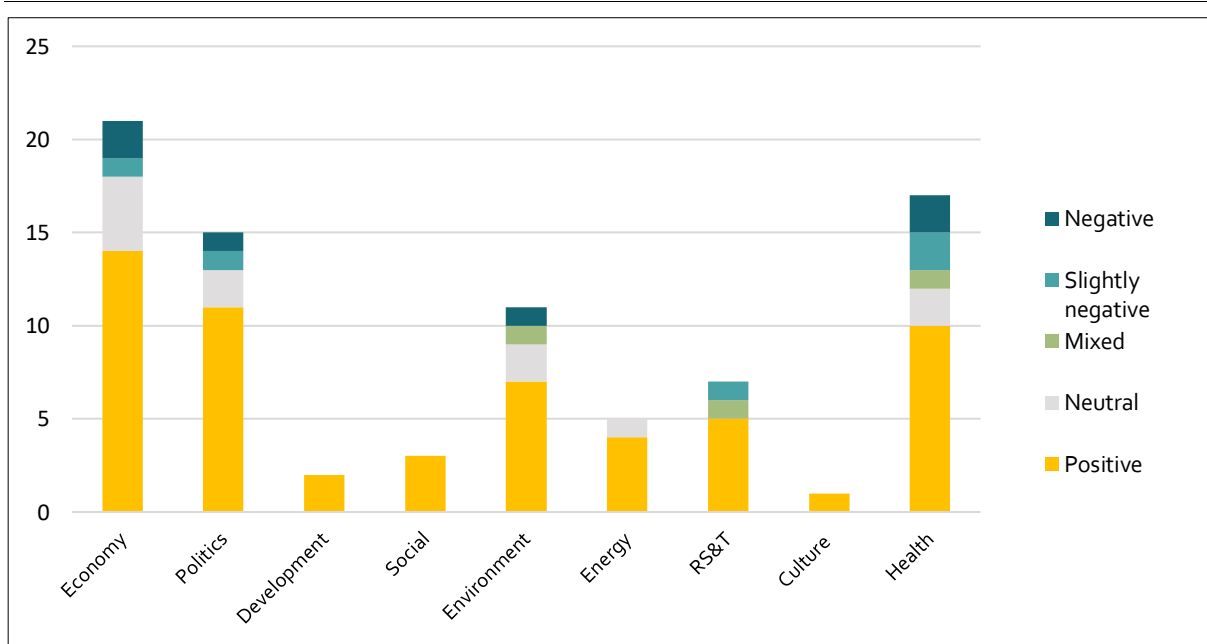
Some interviewed experts further note that the bilateral cooperation between India and EU Member States contributes to the greater visibility of Europe in India because of the longstanding historical and cultural ties between India and these countries. France, Germany, Spain, Italy (and the UK) are seen as important actors in trade, technology, defence and climate change. Both students and the decision-makers consider France the most reliable European partner for India across almost all areas of cooperation, ranging from defence, energy and trade to "soft" power domains. While only two students

mention the International Solar Alliance (ISA), all the experts identify the ISA as a key area of cooperation between the two countries. France is also appreciated for its efforts to support India openly in international fora, particularly for the permanent membership in the UN Security Council. Experts have a more mixed perception of Germany. It is recognised for its technology, especially in the field of automobiles, and for the strength of its SMEs in manufacturing industries and technology. But if German brands are known for their technological excellence, the controversy related to Volkswagen somewhat dented its image. There is also a lot of reference to the UK because of historical considerations, the Indian diaspora in Britain, and Brexit. Finally, the clean Ganga mission (the Netherlands) is among the most visible and successful examples of cooperation between local Indian actors and an EU Member State. Overall, most of the decision-makers perceive the EU as a pioneer in setting international practices and standards and as providing a template for institutions that are accepted and followed globally.

Emotive charge

Similar to the 2015 Study the majority of news in the 2021 sample portray the EU neutrally (40-50% depending on the outlet in focus). However, compared to the 2015 Study, when the media focuses on the EU as a main topic, positive evaluations in 2021 are more visible than negative ones. Here, EU cooperation with regional actors in the Indo-Pacific region as well as support to India’s initiatives and interests has triggered a more positive framing of the EU. However, further potential for bilateral cooperation is framed as mostly neutral and without emotive charge.

FIGURE 39. EMOTIVE CHARGE IN PRESS ARTICLES REPORTING ON THE EU AS A PRINCIPAL SUBJECT. INDIA



Note: Based on qualitative media analysis conducted by country experts. One article can reflect more than one theme.

In the English-language sample of *social media*, the emotive charge of EU-related posts is also mostly positive (42.8%), followed by negative (35.6%) and neutral (21.5%). By contrast, the share of positive and negative evaluations for Europe in social media is rather equal (around 35% each).

Continuity and change behind visibility and emotive charge

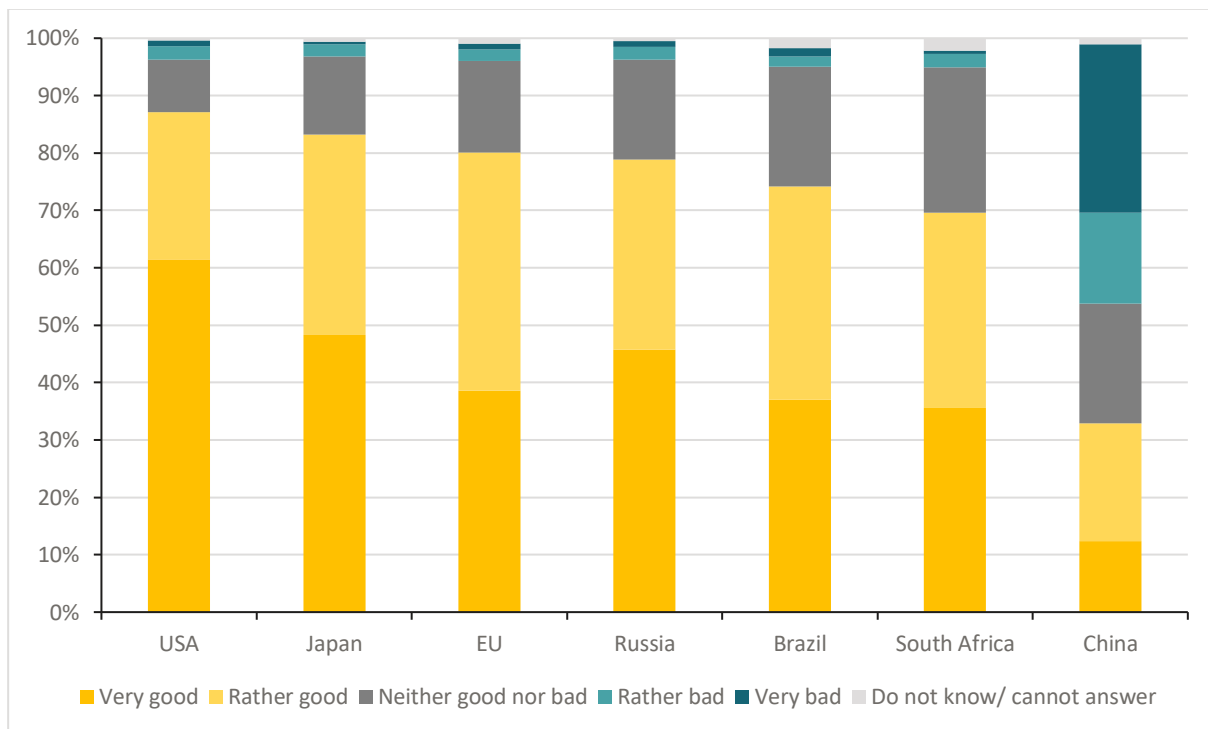
Just as in 2015, *The Economic Times* continues to have the highest media coverage of the EU in the qualitative media analysis. Despite seemingly negative influences such as the protracted EU-India FTA negotiations, the EU maintains its influential position as a global economic player in the Indian media sample and in the minds of the interviewed experts. In the 2021 Indian media, the ongoing FTA negotiations are far more in focus than in the media reporting in 2015. Moreover, our findings confirm a mild increase in the EU's visibility as compared to 2015 in political, economic, and normative themes across all the three dailies. The most visible positive evaluation of the EU by the Indian media and interviews revolve around its geostrategic involvement in the Indo-Pacific region. The EU and Europe thus have a greater visibility in the Indian media as compared to five years ago.

Amongst both the youth and the experts, the general perception of the EU has slightly improved compared to the 2015 Baseline Study. In the short-term, the EU is seen as having an important role in managing the COVID-19 pandemic as well as in upholding the rule-based international order. It is seen to be gradually aligning with India's objectives of development, but EU Member States are still considered to be more proactive (particularly France and the Netherlands). Despite some contradictions internally and sometimes globally, the EU manages to emerge with a single voice. Similar to the 2015 Study, the EU appeals to Indians for its normative image and values. The students and influencers interviewed see here a convergence between the two entities. Overall, across the categories of respondents, the degree of awareness of the EU has increased since 2015 with an eagerness to engage and collaborate more with the EU, resulting in a clear desire to deepen the EU-India relationship. This is also confirmed by public opinion sentiment since nearly 52.4% of respondents strongly believe that the EU is evolving as an important partner for India.

1.5.3. Actorness and local resonance

The EU as a partner

As in 2015, the Indian media and the experts interviewed in the 2021 Update Study continue to portray the EU as an important and trustworthy partner for India. The Indian media explains the EU's increased interest in India by India's growing importance in the region and the involvement of other global actors such as the US, Japan and China. In the public opinion survey, the perceptions of India's relations with the EU comes third in terms of combined positive assessment of "very good" and "rather good" (38.5% and 41.5% respectively) after the US (61.5% and 25.7%) and Japan (48.3% and 34.8%) and before Russia (45.7% and 33.2%) (Figure 40).

FIGURE 40. EVALUATION OF INDIA RELATIONSHIP WITH THE EU AND OTHER COUNTRIES. INDIA

Note: based on Q3: Which of the following words best describes your country's overall relationship with each of the following countries and organisations? (n=1145)

The positive evaluation of the EU in the traditional media comes in the reports on the EU's support for cooperation in the Indo-Pacific region with India and the QUAD nations in maritime trade and connectivity. Moreover, the leading press pay substantial attention to the high-level meetings between Indian and EU officials. *The Times of India* and the *Economic Times* positively report on the EU Summit held in Portugal on 8th May 2021 as the start of a series of high-level bilateral meetings in Europe.

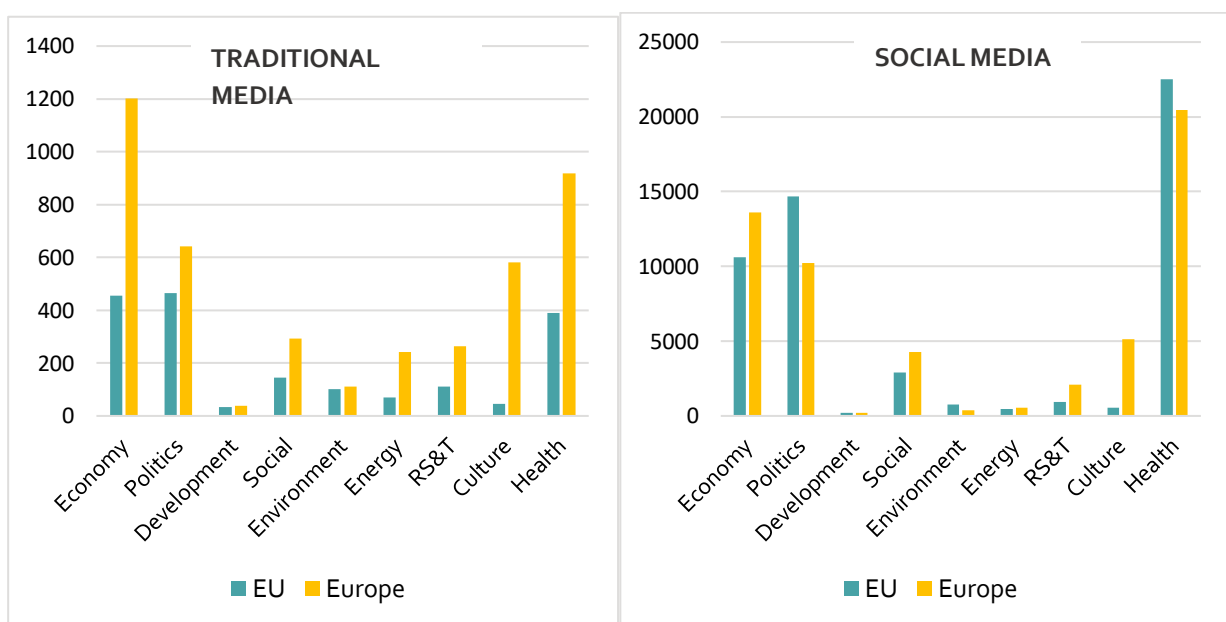
Health is also an important and visible theme in the traditional media reports (Figure 41), with a focus on the EU's vaccination strategy, securing vaccine supplies from AstraZeneca and the approval for the vaccine technology waiver (backed up by the BASIC nations (Brazil, South Africa, India and China), the League of 80 nations, India and Africa at the WTO). At first, the EU's ban on vaccine exports was communicated negatively, but the EU's support to waiving the patent has changed this evaluation to positive. The COVID-19 pandemic sets the stage for more media attention towards the EU when reporting on the EU in the context of health-related technologies and Indian pharma companies, thus increasing the EU's media visibility. Reports also cover the EU's involvement in environmental and water projects, which are considered favourably. The EU's public diplomacy events further appear in the local regional editions of the Indian media: *The Hindu's* Coimbatore edition, *Tamil Nadu*, reports on EU-India cooperation in understanding human brain diseases, while the *TOI* reports on the celebration of the Earth Day (with EU delegates) in Roorkee, demonstrating positive local resonance of the EU.

The EU is generally seen as an important partner for India in international relations by the media and the general public. An overwhelming majority of the survey respondents see the EU in such quality (52.4% strongly agree and 31.4% agree). The EU is also seen as a trustworthy partner (44.8% strongly agree and 36% agree) and as a partner in educational exchanges (43.6% and 33.2% respectively). Overall, the share of negative views towards the EU's importance in these fields is very limited, ranging between

3-4%. Very few respondents (between 1.2% and 1.6%) could not decide on the EU’s role as India’s partner and the vast majority (84%) agree, as in 2015, that the EU should have stronger political ties with India. Overall, the EU continues to be perceived as an important and trustworthy partner over the years, although there is still a short fall in its ranking when compared to other partner countries. When considering “very good” positive assessment, however, Russia (45.7%) now comes before the EU (38.5%) as opposed to five years ago.

Both interviewed youth and the multipliers/influencers tend to agree that the EU is an important trade partner for India. In terms of India’s defence and strategic interests, the experts see the EU neither as a significant player nor as a global power, as compared to the US and some of the individual Member States, especially France. However, the EU is highly appreciated and well recognised for its competencies in “soft” areas, such as setting up institutional frameworks, standards, and rules. The respondents believe that the EU can play a significant role in providing crucial support to India with its current plans of development in terms of technology, information, infrastructure, energy, and other areas, such as clean drinking water, water conservation projects, transport management and smart cities projects. The EU is also perceived as a critical partner in education, science, and technology as well as in research and development and increasingly on health-related issues.

FIGURE 41. THEMATICAL FOCUS OF SOCIAL MEDIA AND PRESS ARTICLES REPORTING ON EU AND EUROPE. INDIA



Note: based on automated quantitative data analysis. Includes press articles which report on the EU and Europe as a principal or a secondary subject of the article. One article can reflect more than one theme.

The “local hook” in the EU’s coverage has become much more prominent in Indian media in 2021. Some of the regional sections/editions reference the EU’s public diplomacy events (as discussed earlier). The EU is in the main focus in top-stories, notably on pharmaceutical, health or political themes. *The Times of India* leads in covering the EU news where the EU engages with local actors (two articles in the qualitative sample); the EU continues to be seen as bearing direct relevance locally.

In contrast to the 2015 Study, when international sources dominated in the press reporting of the EU, the qualitative media analysis shows that, in 2021, local sources are leading the coverage when the EU is in the major focus. Only one article in *the Economic Times* draws from a mixed source (local and

Reuters). Most of the EU news items from the qualitative dataset are produced by reporters who regularly write about the EU: Dipanjan Roy Choudhury (*Economic Times*), Indrani Baghchi (*Times of India*) and Kirtika Sunaja (*Economic Times*). The quantitative media analysis finds the most used international sources for the “EU” dataset are *Associated Press* (14%), *BBC* (13%), *Bloomberg* (11%), *Reuters* (11%) and *The Conversation* (10%). Other, less used news agencies are *The Financial Times* (9%), *The Daily Telegraph* (7%), *The Economist* (4%), *The Independent* (4%), *The Wall Street Journal* (3%) and *The Washington Post* (3%).

In the observed Indian *press*, the EU is most often mentioned in connection to politics (26%) and economy (25%), as in the 2015 Study, followed by health (21%; in 2015 it was part of highly visible social theme). For Europe, the economy (28%), health (21%), politics (15%) and culture (14%) are the most prevalent themes. A considerable number of articles contain social thematic frame (8% for EU, 7% for Europe), whereas the remaining themes are less visible.

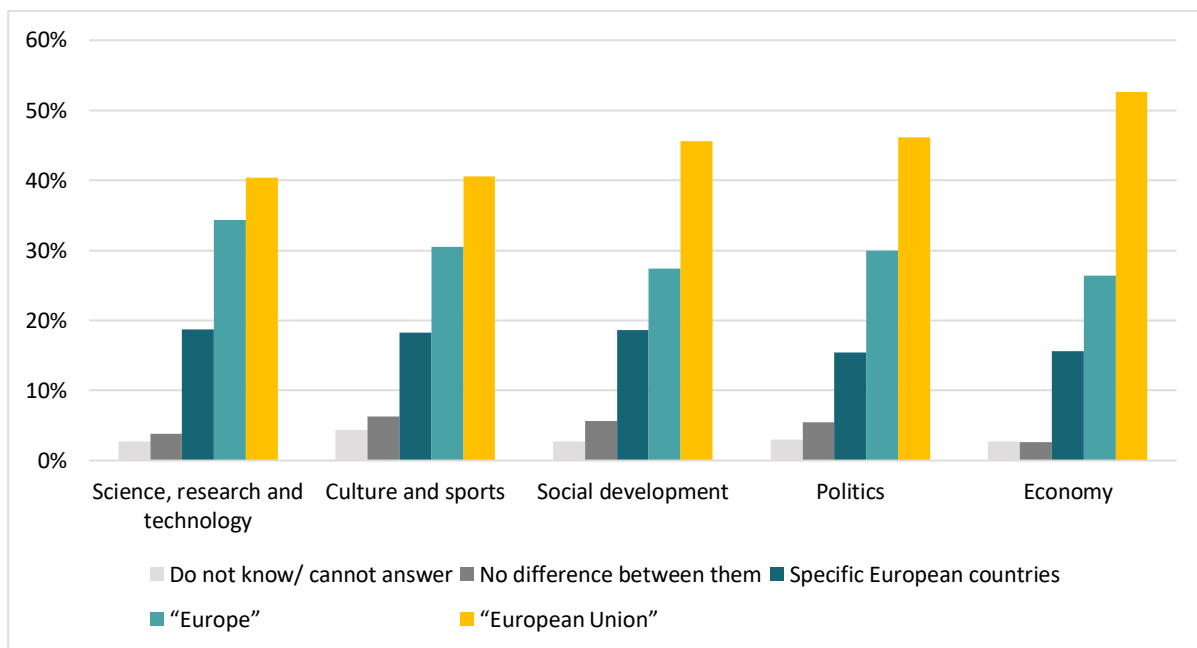
In Indian *social media* posts, health dominates in the references to the EU (41.9% of the sample). Politics (27.4%) and economy (19.8%) are visible as well. Health (18%), economy(24%) and politics(18%) are also the top three visible themes in “Europe” set. In comparison to the EU, Europe is much more often mentioned in the context of the economy (23.9%) and culture (9%).

According to the public opinion survey, among the most popular sources of information about the EU in India, online media come first (79.7%), followed by television channels (66.3%), while social media (56.9%) remains close to print media (52.5%). More generally, schools, colleges and universities are considered to contribute immensely to the development of mutual cultural understanding, but they are not frequently mentioned (28.7%). Movies, art and literature are featuring with 24.8%.

Economy and trade

Given the EU-India Summit in May, the economy tends to dominate media reporting of the EU (qualitative analysis sample, business news mostly) (see also Figure 42), especially the India-EU FTA negotiations and the Indo-European trade ties. Even *The Times of India*’s focus on political and normative themes revolves around bilateral trade. *The Hindu* reviews the EU’s internal economic challenges in terms of their impact on Europe’s approach to India. Compared to 2015, the media in 2021 reveals a slightly more positive framing of the EU in relation to the FTA ahead of the Summit. The Indian press also focuses on the EU’s economy hit hard by Brexit and by internal economic challenges due to COVID and international tensions with some negative impacts on EU-India trade. In *social media*, the focus on Europe in the context of economy is greater than the EU.

FIGURE 42. ASSOCIATION OF DIFFERENT AREAS TO THE EU VERSUS EUROPE. INDIA



Note: based on the answers to Q22: Some people think about Europe, whereas others think about the European Union when talking about economy, politics, culture, sports and other areas. In your case, which term – Europe or the European Union - comes to your mind first when you think about the following subjects? (n=1145)

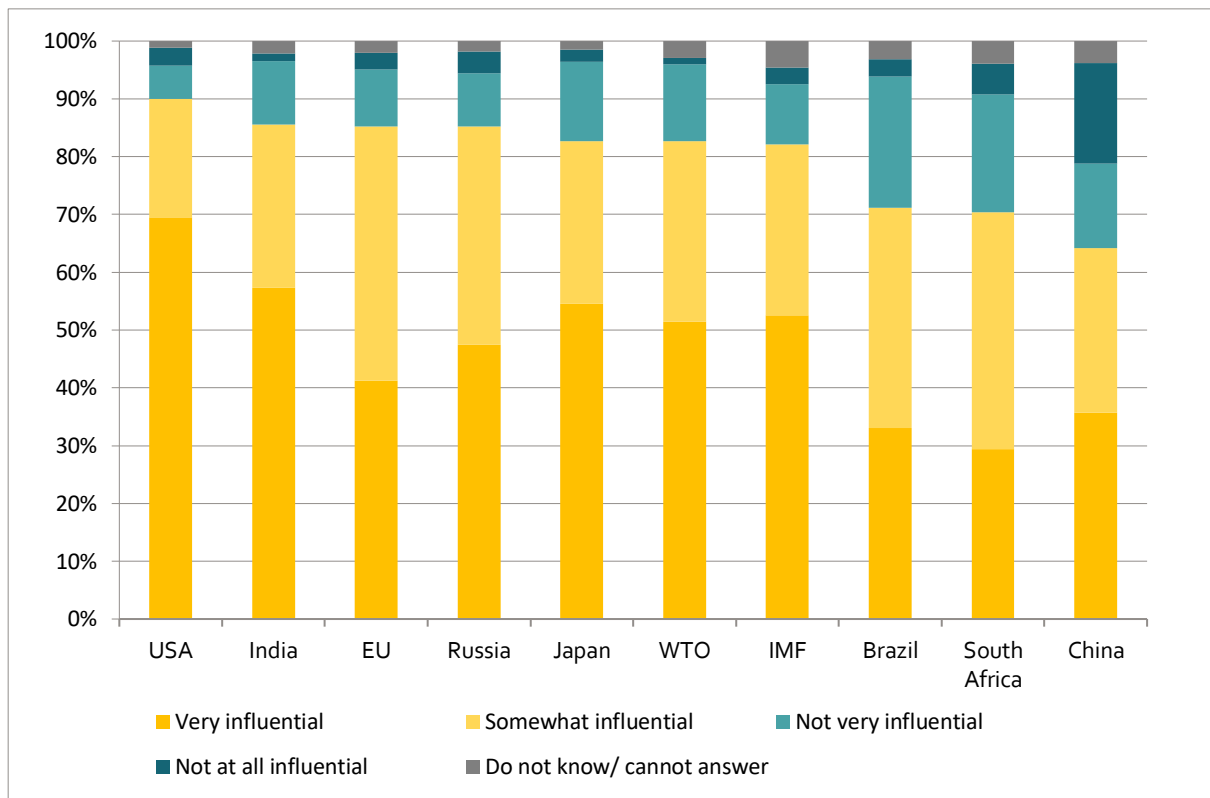
Students and influencers continue to see the EU primarily as a trading block. All EU actions in the economic field are seen as important for India because EU-India cooperation creates commercial opportunities, which have increased post-Brexit. Prior to that, the UK was seen as the main gateway into the EU. One of the experts expresses that ‘the EU is the best organisation in the world, but it is there for the protection of European interest’, which is not always in India’s own interest. This is despite the fact that EU standards are known globally for their high quality. The interviewees also see the EU Delegation in India to be promoting not only EU trade but supporting the EU Member States in their economic objectives. There is nonetheless an increasing momentum in deepening bilateral trade ties as both India and the EU perceive each other as indispensable partners for future trade growth. The youth in particular feel that greater bilateral work could strengthen EU-India trade by removing non-tariff barriers and acting more proactively in the transfer of green technologies to India.

The potential for tighter economic cooperation between the EU and India is also reflected in the public opinion poll, where most Indian respondents consider the EU as an important economic partner for their country (52.6%), over specific European countries (15.6%). When participants are asked to clarify whether they associate the field of science, research and technology with the EU, Europe, or individual European countries, there is a more marginal difference in the content of Indian perceptions of the EU (40.3%), compared to Europe (30.3%) and specific European countries (18.8%). The EU (41.3%) is considered a very influential actor in global economic affairs but as lagging behind the US (69.5%), India (57.3%), Japan (57.4%), the WTO (51.4%) and Russia (47.4%) (Figure 43). This shows, however, a slight relative improvement compared to 2015 when the EU was seen as influential by around 35% of respondents. Moreover, in 2021, 40% of survey respondents recognise the EU’s greater presence in the economy, politics, social development, culture and sports, and science and technology.

The results of the public opinion poll also confirm the importance of the EU as a partner and foreign investor for India as well as the need for a stronger bilateral partnership, which is recognised by over

75% of the survey respondents. Only very few (less than 3%) do not know much about the relevance of the EU economically for India and 3.1% of the respondents were unsure if the EU is protecting its market at the expense of others.

FIGURE 43. EU INFLUENCE IN GLOBAL ECONOMIC AFFAIRS COMPARED WITH COUNTRIES AND INTERNATIONAL ORGANISATIONS. INDIA



Note: based on the answers to the survey Q6: In your view, how influential, if at all, in global economic affairs are the following countries and organisations? (n=1145)

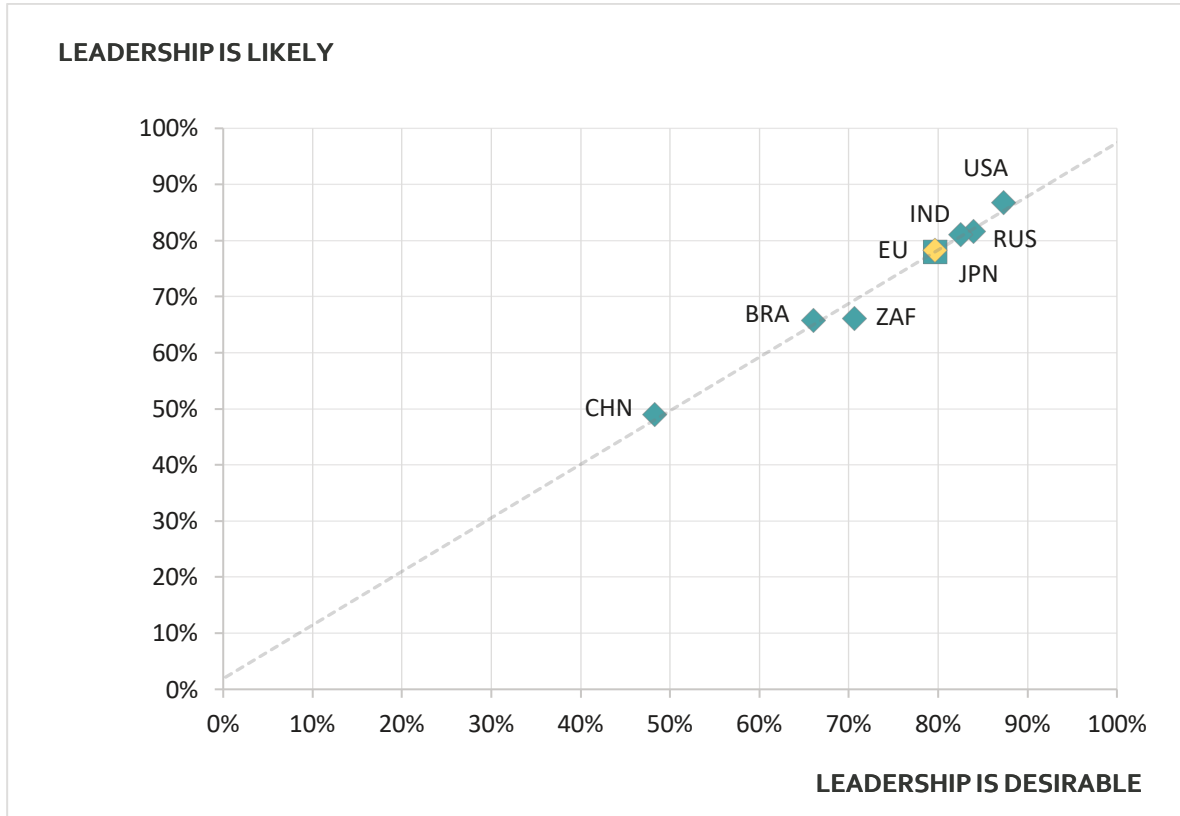
Politics

The media coverage on political issues is centred around burning issues just as in 2015 (back in 2015, it was the Iranian Nuclear deal; in 2021, it is the Indo-Pacific issues). Indian media frame EU actions towards Pakistan negatively and, towards other players, mixed. By contrast, the projection of the EU’s role in the Indo-Pacific (India’s economic and political centre of gravity) is reported overwhelmingly positively. Generally, when reporting on the EU, the news outlets stress the need for a more proactive EU in international affairs and mostly report on the EU’s external political actions.

The EU’s leadership in world affairs is seen by the wider public as desirable, but, as in 2015, as lagging the US, India, Japan and Russia in terms of the likelihood that any of these countries would take a strong leadership role in future (Figure 44). The poll further shows that the EU (49.5%) is ranked below India (66.7%) in terms of its role in maintaining global peace and stability, followed by the US (65.0%), the UN (64.7%), Japan (56.4%), Russia (51.5%) and NATO (50.9%). Amongst the “do not know category”, the awareness about the EU (0.7%) is at par with other major powers (the US; India; Japan) and institutions (UN). The performance of the EU in support of regional and international cooperation is considered as very good (46.7%) and fairly good (37.6%). The “do not know” category (2.4% respondents) is much

higher than the “very bad” (0.2%) – ultimately projecting a good image of the EU. Its role on the media freedom is also greatly appreciated (47.6% of “very good” impressions).

FIGURE 44. DESIRABILITY VS. LIKELIHOOD OF EU GLOBAL LEADERSHIP COMPARED TO OTHER ACTORS. INDIA



Note: based on Q4: How desirable is that each of the following countries and organisations take a strong leadership role in world affairs? And Q5: how likely or unlikely is it that each of the following countries and organisations will take a strong leadership role in world affairs five years from now? (n=1145) The horizontal axis presents the sum of “Very desirable” and “Somewhat desirable” responses to the Q4. The vertical access presents the sum of “Very likely” and “Rather likely” responses to Q5.

Students in the focus groups link the EU’s political image to its norms. Youth associate the EU with democracy, strong institutions, economic development, transnationalism, and supranational organisations. The EU is also perceived as upholding the values of human rights, gender justice and as a multicultural society that embraces diversity. Overall, it is seen to have the capacity to be an influential normative actor and a leader globally. However, participants feel that at times the EU falls short of timely concerted action, such as during the refugee crisis. This is notwithstanding the fact that for both the experts and the students interviewed, the EU does not rank very high in the list of India’s key geostrategic partners, because it is not viewed as a “hard power” for India’s security cooperation. The experts further feel that the EU faces internal divisions. Moreover, the EU has not been seen to be vocal about strategic issues important for India’s concerns, notably towards China. However, many experts highlight that if Europe wishes to be a more important stakeholder for India politically, it should take on a more proactive role globally, as it has done over on the Indo-Pacific policies.

Climate and Environment

In contrast to 2015, where reporting on the EU's role in environment protection was very marginal, the 2021 media analysis reveals a much greater emphasis on this issue. The media coverage on environment and climate change is done both from regional and global perspectives. *The Times of India* highlights the European Green Deal, energy efficiency, renewable energy, smart grids and grid integration, storage, sustainable finance, the implementation of the Paris Agreement and EU research and innovation initiatives in a positive way. However, the EU's plan to impose a carbon border tax is reported negatively.

The public opinion poll echoes the message highlighted by the media and puts the EU as the fifth important actor (57.3%) in fighting against climate change after India (66.5%), the US (66.3%), the UN (60.2%) and Japan (57.4%). There is no significant change in the public opinion poll on the EU's role in protecting the environment as the EU continues to occupy the fifth position (like in 2015): the EU (50.4%) is ranked below the US (63.8%), India (63.7%), the UN (53.3%) and Japan (50.9%). However, the EU's importance in fighting climate change is now seen to be larger than that of Russia (53.7%). Only a small percentage of respondents (1.3%) do not know about the EU's role in protecting the environment.

The experts agree that many of the EU programmes and initiatives in the field of environment and climate change address India's needs and are converging with the objectives of India's development (for example cooperation on clean technology, the clean development mechanism or the assistance provided by the EU in India's Solar Park Programmes). These projects are carried out in close cooperation with state governments and NGOs, particularly in the field of environment sanitation. They are also in line with the programme on smart city development and transportation by the current central government. However, despite their effectiveness, all these programmes are believed to retain a rather low visibility amongst the general public, whilst the youth expect that the EU-India relationship will become more intense in the future in the field of sustainable development, green technology and environment.

Energy

As in 2015, in 2021, the media coverage of EU energy policies and its cooperation with India is very limited. In the news sample reporting the EU with a major focus, except for the business newspaper (*The Economic Times* – 4 articles), no outlets give prominence to energy projects (*The Times of India* – 2, *The Hindu* – 1). *The Times of India* reports on the increasing energy consumption in India forecasted by 2040 whereas the *Economic Times* highlights the EU's willingness to cooperate with India in the Coalition for Disaster Resilient Infrastructure (CDRI) and the EU-QUAD Nations Summit. Emphasising the EU-India connectivity partnership, *The Economic Times* stresses upon the areas of digital, energy transportation and human connectivity. Whilst the 2015 Study focused on the security of supply and competitiveness, weakened demand for oil import and ongoing European efforts to increase the share of renewable energy, in 2021, the focus has shifted to sustainable development and cooperation in renewable energy. The lack of extensive reporting on the issue might also to some extent explain why the general public does not have a very positive view of the EU in the energy field. Since some of the programmes such as the clean Ganga mission or the European Green Deal are only at their initial stages, the respondents may still be unaware of European policies in the field.

Among the youth, the visibility and awareness about the EU are the strongest in the areas of climate change, environment, and green energy. The experts further share the opinion that the EU is a norm-setter in climate, energy and environment, especially green energy. One of the best examples being the emission norm followed in India, which is now known as Bharat 5 (or Euro 5 earlier). Both experts and students hope that the EU could be more proactive in sharing and transferring green technologies to their country and in helping India to reduce its dependence on fossil fuels without compromising on

growth. This is also tied to the fact that both India and the EU are committed to cut down emissions and meet the goals of Paris Agreement.

Research, Science and Technology

Despite the importance given to science and research in bilateral relations, only one article from the *Economic Times* in the qualitative dataset directly reports on this theme by covering approval for cancer drug. *The Hindu* further reports on the signing of a Memorandum of Understanding for human brain study, but the news item does not get a visible placement (it features only in the side column). Reports that present the EU with a major focus do not have any updates on the ongoing EU research funding and Horizon 2020 projects highlighted in 2015.

The public also does not give much prominence to the EU in the field of RST. The EU (50.5%) scores lower than the US (75.0%), Japan (65.4%), India (60.8%) and Russia (57.0%). However as opposed to 2015, when the EU's importance in innovation and technological progress was ranked as similar to that of Russia, in 2021, the EU is ranked much below Russia. 3% of the respondents do not know about the EU's role in advancing innovation and technological progress. In contrast, most of the experts interviewed consider science and technology an important area of cooperation between India and the EU, where the EU has strong capabilities. Both the experts and the youth further see the EU as a trend-setter in science and technology – a view confirmed by reflections on the EU in the context of the current COVID crisis globally. The swift development of the vaccines (both AstraZeneca and Pfizer), the management of the COVID outbreak and the relief aid provided by the EU are seen as the proof that the EU is very advanced in the field of innovation. The EU is often identified as one of the most suitable places for scientific research along with the US. But interviewees acknowledge that there is still a preference to travel to the US for research and higher education, because of India's stronger proximity with American culture and society. This assessment is similar to the one discovered in the 2015 Study, when the EU was seen as a pioneer in the development of new technologies especially in technology, cyber security and research.

Development and assistance

The media pay very limited attention to the EU in the context of development and only briefly mention key EU policies on sustainable development issues. Development is, however, an area where the EU is seen as a trend-setter (along with science and technology, research and green technologies). The youth and the experts also feel that the EU and its Member States have a lot of capabilities to cooperate more with their country on a wide range of India's governments flagship programmes, such as smart city and infrastructure development, clean and green energy initiatives or sanitation. In the programmes mentioned above, Sweden, France and Germany are considered the most meaningful partners. While there is a lack of development coverage in the media, the interviewees see a huge potential in this area. However, the issues described in the 2015 Baseline Study (such as social development inside the EU and international development) do not feature again either in the media nor in the answers of the interviewees. Rather in the last five years the focus has shifted towards sustainable development, science and technology, and the development of green technologies.

The wider public in India views the EU's support to developing countries very positively, although the EU (53.9%) is still perceived to rank behind the US (67.8%), India (64.4%), the World Bank (62.6%), the UN (61.6%) and Japan (54.9%) in eradicating poverty and in peacebuilding. This represents a slightly lower position compared to the 2015 Study when the EU's role was perceived to be greater than that of the World Bank and the UN. The EU continues, however, to play a more important role in support to developing countries than Russia, Brazil and China. Overall, in 2021, the EU's performance is seen as very good in supporting developing countries (39.5%) and in fight against terrorism and radicalisation

(37.8%). Only a very low percentage of respondents does not know about the EU's role in this area (1.9%).

Social

Social issues are practically invisible in the qualitative media sample which deals with the news where the EU is a major focus. In 2015, poverty eradication and migration featured merely with regards to discussions on the Eurozone crisis. In 2021, the only article in the social frame (from *The Times of India*) highlights the Agence Française de Development's direct cooperation at the grass-root level with Chandigarh Smart City Limited and the Municipal Corporation Chandigarh on water supply as a very positive project. Moreover, the results of the public opinion poll show that in 2021 the EU's performance across social development indicators is perceived slightly more positively than in 2015. Except for the integration of migrants and refugees, the EU's performance across other themes is rated as "very good" (above 40%) in 2021 as opposed to around 30% in 2015. The respondents also have more positive attitudes towards EU actions in education (53.3%) and employment opportunities (47.2%).

The image of the EU in the social sector remains largely ignored by interviewees and in some cases is seen negatively because of the perceived marginalisation of migrants and the rise of the far-right in the EU by students. This is mostly because the EU and India are seen as different in managing their cultural diversity. The EU is sometimes considered as having double standards when it comes to issues such as human rights, racism, equality, and justice. However, social policies related to labour laws, anti-monopoly, devolution, competition law, corporate law, taxation, employment generation, privacy laws and gender equality are perceived to be worth emulating as the best practice models available globally – something that is framed positively. The students further believe that, as a bloc with significant resources, the EU can play a more proactive role in helping developing countries to build their own capacities.

Culture

Cultural issues receive very limited media attention and only as part of EU-India bilateral negotiations. As opposed to the 2015 Study where social and cultural affairs accounted for 38.5% of all European stories, in the 2021 qualitative and quantitative media, they account for around 9% coverage of European stories (considering either Europe or the EU). The social media coverage of cultural affairs is much higher for Europe (10% approx.) as compared to the EU (1.1% approx.). Cultural issues are completely missing in the 2021 news reporting the EU as a major focus (only one article in this sample mentions culture). In the public opinion survey, India (67.7%), the US (55.7%) and Japan (57.3%) continue to dominate perceptions in terms of attractiveness of their culture and lifestyle. The EU (46.8%) is, however, preferred over Russia (40.8%). Indian respondents view the EU very positively in various fields of culture, such as tourism (55.6%), the high quality of the food industry (51.1%), the entertainment industry (53.0%) as well as sports (50.8%). Perceptions in this issue-area follow the 2015 pattern.

Whilst interviewed youth does not have much knowledge about EU cultural programmes, the experts feel that the channels of cultural diplomacy are not fully operational between India and the EU. Some EU Member States have their cultural centres in India, but none represents the EU as such. The youth expresses clearly that a more common identity is lacking. This is attributed to the fact that the EU itself is culturally diverse and that there is no clear-cut image of "EU culture". Nevertheless, some experts emphasise the importance of the cultural programmes, which India has with the individual EU Member States – with a special focus on museums, architecture, conservation labs, curating and archaeological institutes. This is regarded as providing a significant support to mapping India's own cultural resources and is similar to the opinions voiced in the 2015 Study.

Health

Health was not a prominent theme in 2015, and most of the health-related articles in 2021 cover COVID-related issues and the EU's vaccination strategy. In the sample where the EU is reported from a major focus, there is a negative evaluation of the EU's recalibration of its vaccine strategy due to a shortfall in the delivery of the vaccines from AstraZeneca (*The Times of India*). This is followed by less negative evaluation of the EU's concerns over delays in the vaccination in the EU Member States and calls for global cooperation on the issue (*The Economic Times*). Highlighting some internal divisions within the EU, *The Hindu* provides a detailed account of the pandemic related riots in the Netherlands.

Nevertheless, the surveyed Indian public evaluates the EU capability in the health sector positively (EU – 42%; Europe – 35%). However, there is a large proportion of EU activities in this sector that are not known in India. Most of the respondents perceive the EU's performance as very good in science and research (59.8%). Furthermore, the EU's research in the medical sector (52.6%) and global health (50.7%) are highly appreciated.

Indian decision-makers as well as students believe that India needs to improve its health infrastructure and level of sanitation significantly – the two areas where the EU is recognised as having high standards and where there is a need to cooperate more with the EU, especially post COVID. Interviewees stress that the EU has certainly helped India in providing relief aid, but this is not seen as enough. They believe that massive investments and steps are required to establish a stronger bilateral relation. Most of the experts further claim that the EU must take the lead in the health sector if it wants to emerge as a global leader. Health as a separate theme was not covered in the 2015 study. However, its significance increased in the present study because of the current pandemic.

Continuity and change behind actorness

The current pandemic as well as the bilateral EU-India Summit in May have shifted the traditional media attention from predominantly social, political and environment themes to the vaccination strategy, securing vaccine supplies and the approval for the vaccine technology waiver. COVID has also drawn attention to health-related technologies increasing the EU's visibility and positive framing of the EU in research and science.

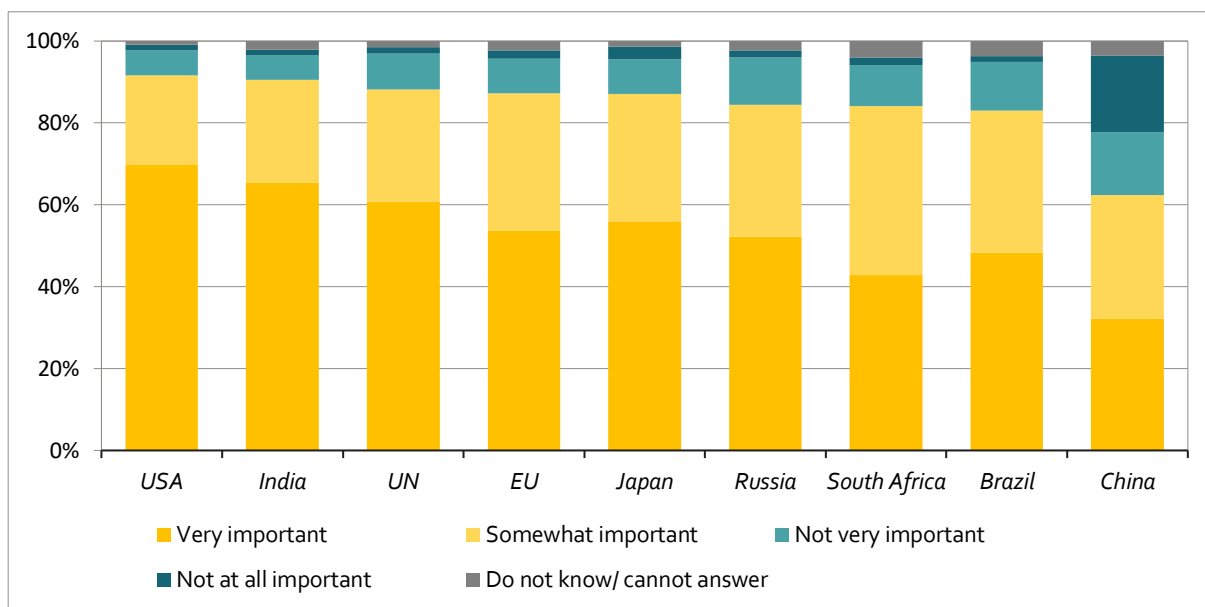
Overall, the EU appears slightly more visible in 2021 than in 2015. Whilst there remain difficulties in bilateral relations (such as the ongoing negotiations on the FTA), the India media highlight positively the potential for stronger EU-India ties. The second most important theme covered by the media are Indo-Pacific concerns, which were not reported in 2015. While the media evaluation of the EU is neutral or slightly positive (in the case of the *Economic Times*), the experts are more positive about the EU coming out more openly in terms of its own policy in the region. For both the experts and the students, the EU's competencies and actorness are well acknowledged in the field of democracy promotion, rule of law, minority rights, gender equality, the management of cultural diversity and justice. However, the EU is still perceived as a "light weight" when considering India's geostrategic and security concerns. One expert expresses the view that the EU is not a 'hard power', yet, as we have noted, it operates successfully as a 'soft power'. The students also mentioned that the EU lacks military strengths and is best recognised in "softer" areas.

1.5.4. The EU as a norm-setter

As in 2015 and 2021, the normative themes of the EU do not attract much media attention. In 2021, few articles mention the EU norms in the context of democracy, human rights, and the rule of law. These discussions usually appear in news covering Jammu and Kashmir (India), Brexit or cyber-security.

Also similar to 2015, within public opinion, the Indian respondents in 2021 see India’s role (65.4%) in promoting and defending global human rights as second most important to the one of the US (69.7%) (Figure 45). The EU’s (53.6%) role continues to be seen as just above that of Russia (52.3%) but it has, however, increased in relative terms (only around 35% saw the EU as playing a very important in global human rights in 2015). Based on the perception of convergence of values and norms, 39% of the respondents strongly agree that both the EU and India share common democratic principles and 43.1% consider the EU as a good example for India in promoting gender equality. A very insignificant percentage, barely 1%, disagree with this statement. As far as the perceptions of similarity of individual values with the EU are concerned (such as equality between women and men (55.1%), justice (51.1%), equality (50.9%), the rule of law (50.4%) or democracy (50.0%)), most Indian respondents consider that they are similar. The students also recognise the EU as an important actor and norm-setter in the field of human rights, democracy, strong institutions, economic development, freedom of movement and regional integration. They are keen to emphasise that India can find some inspiration in the norm-setting experience of the EU.

FIGURE 45. PERCEPTION OF THE IMPORTANCE OF EU, OTHER ORGANISATIONS AND COUNTRIES IN GLOBAL HUMAN RIGHTS PROMOTION. INDIA



Note: based on Q11: In your view, how important, if at all, 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? (n=1145)

In contrast, the Indian media in the dataset rarely portrays the EU as a norm-setter.

Continuity and change behind the perception of EU as a norm-setter

As in 2015, the perception of the EU as a norm-setter is not very visible in the 2021 media analysis. EU norms such as peace are not mentioned. The experts interviewed extensively emphasise the complete absence of in-depth media reportage of the EU’s normative principles. Even further, most underline that the EU’s strength in norm-setting could significantly benefit India. The opinion of the experts is very much like the findings of the 2015 Study where the EU was considered a normative actor in “soft” areas and values related to justice, equality, women empowerment and social security. In line with the perceptions expressed in the 2015 Baseline Study, the students also perceive the EU as upholding the values of democracy, human rights, gender justice and a multicultural society that embraces diversity.

More specifically, the EU is perceived as strong actor in the field of climate change, renewable energy, environment. With minor exceptions (such as the rise of right-wing parties and instances during the refugee crisis in 2015-2017), the EU is looked upon as the best model for governance and management of cultural diversity. Similar to the 2015, decision-makers see a synergy between India and the EU in the normative discourse. The students and the experts continue to reiterate that the EU is a strong normative actor even though there can be a mismatch between the framework offered by the EU and the local sensibilities and realities.

Overall, most experts and students interviewed feel that Europeans have guided 'modern ways' of development for many decades. Some students mentioned that 'the EU has the capacity to be a leader and must take up a leadership role in areas of significance upon human life'. There are however also negative perceptions, related to historical and political reasons, such as memories of colonialism and inequality. The youth, similarly to the views expressed in 2015, considers that the image of this colonial past remains negative. However, over the decades, the bitterness of the colonial experience seems to have reduced.

1.5.5. Continuity and change

Indian perceptions of Europe in general, the EU Member States and of the EU in particular have not been fundamentally altered over the past five years, including after Brexit, which was deemed a driver of change by the literature. The EU continues to be seen as a key strategic economic partner for India and as a significant pole in international affairs. Despite some improvements in the perceptions towards the EU in India, the relationship between India and Europe is still best defined through a bilateral framework with individual Member States rather than with the EU. The EU is, however, increasingly positively perceived as an example in areas of education and research, smart city projects, infrastructure development, transport, green energy, and renewables, as well as climate change. The literature review as well as the interviews with multipliers and influencers and focus groups point towards emerging areas of greater engagement such as climate change/environment, security, connectivity, and health.

Across all the methods of analysis in this Study, several exogenous factors appear to have influenced the evolution of Indian perceptions of the EU over the past five years. The pandemic has in some respects positively impacted the visibility of the EU in as much as it has put an emphasis on potential new areas of bilateral cooperation such as health and pharmaceutical exchanges. Other factors are directly related to India's evolving relationship with external partners, such as the US, China, Japan or Russia on a range of fields pertaining to EU-India ties (*local-* and *region-specific* factors in combination with *global* factors). Endogenous factors within the EU and India have also played a part: Brexit and the refugee crisis or the pace of economic development within India itself. However, the general trend shows that perceptions have tended to improve in terms of the willingness to consider the EU as an increasingly important partner and readiness to deepen areas of bilateral cooperation. Despite the very active and successful initiatives undertaken under the public diplomacy initiatives by the EU Delegation to India over the past five years, there is still a significant lack of visibility of the EU, its presence, and programmes across India at more local and regional levels.

Second, the EU is still recognised for its democratic institutions, freedom of speech, free movement of people, the rule of law, justice, equality, minority rights, human dignity, gender equality and tolerance. These values are considered a legacy of the enlightenment era, and, in contemporary times, the experts feel that there is need to strengthen democracy and modern values for the benefit of mankind. According to the interviewees, the EU should, however, invest more energy in strengthening and promoting these values globally. The youth feel that the EU has the capacity to be an influential normative actor/leader globally in social, economic, and political terms. Moreover, the EU with its standards, practices and institutional framework can continue to offer useful insights into the

management of many development concerns that India has, such as improving the standards of living, the dignity of human life and values that enhance individual capabilities. Third, many areas are being covered by complementary bilateral relationships between India and the EU Member States, but when it comes to India's needs, there is a general feeling amongst the experts that the EU is not 'present' enough. Both the experts and youth emphasise the possibility for deeper cooperation with the EU on some of the "medium-ticket" programmes such as in the field of health, culture, research and development and education.

1.5.6. Recommendations for EU public diplomacy

The above analysis reveals that the areas where the EU is seen to be capable of playing a greater role are mostly linked to climate change, development, health, connectivity, science, and technology. Our analysis also demonstrates that the EU has somewhat increased its visibility in India over the past five years, although there is still room for further improvement and especially at the periphery. This is considered particularly important because the public still does not see the EU as a core partner for India geopolitically and because the EU has a rather low visibility as an international actor in the leading press. Meanwhile, India has a population of more than a billion people, of whom 65% are below the age of 35 years. The youth in India is dynamic, progressive, technologically, and digitally skilled. There is evident potential for EU public diplomacy initiatives that are in line with some of the flagship programmes of the current Indian government especially if they address the issues and challenges faced by the youth. EU initiatives in the field of education, skill development, digitalisation, development of smart cities and climate and the environment have scope for involving the young talent and educated youth. The EU is already perceived increasingly positively – as an example in the areas of education and research, smart city projects, infrastructure development, transport, green energy and renewables, as well as climate change. We present a range of recommendations focusing on new policy aims, practices and stakeholders thus emerge from the above theme-based analysis in at least five key areas.

Theme: Politics

Indian media and decision-makers highlight the EU's increasing interest in India due to its growing geopolitical role. They also positively perceive the EU's appreciation of India's importance as well as the EU's engagement in the Indo-Pacific. Moreover, both India and the EU are considered like-minded partners in terms of their support to the liberal international order, and there is a growing recognition of a potential for strategic cooperation between the two. While there is a perception among Indian decision-makers that individual EU Member States (France in particular) provide more support for India, the individual achievements of the EU Member States contribute to an overall positive image of the EU and provide positive grounds for the EU to move forward. Moreover, high appreciation of the EU as a norm-setter bears significant potential for EU-India cooperation also in third countries and in issues such as the promotion of democracy, conflict resolution and peacebuilding initiatives.

Policy aims:

- To support and further promote the idea of the EU as a trustful, like-minded, and capable partner for India through its diplomatic actions.
- To project the image of a collegial partner capable of bringing more support to India while synergising with activities of EU Member States in the country.

Medium to long term steps:

- To strengthen the strategic dialogue between India and the EU. This refers in particular trade, security and connectivity in one strategic framework/locally appealing narrative.

- To continue to invest more in raising awareness about the EU in India, but also about its strategic role vis-à-vis individual EU Member States.

Short-term steps:

- To increase the involvement of actors on the ground in those areas where the EU can act as an ambassador for the individual European countries
- To reach out to EU Member States when devising new EU joint actions because India is one of these countries where there is a significant EU Member States' presence and where complementarity of diplomatic efforts is the key; to further use platforms made available by individual EU Member States to promote EU messages.
- To involve more key experts both from Europe and India (as well as experts and media representatives from the third countries of relevance) into joint projects dealing with democracy support, conflict resolution and peacebuilding initiatives; to use bilateral visits between Indian and EU officials to increase the EU's visibility and promote strategic dialogue.
- To further promote the implementation and development of the comprehensive EU-India Connectivity Partnership in the Indo-Pacific, through the EU Think Tank Twinning Initiative Framework and further research cooperation at think tank and university levels on specific projects of relevance to EU-India interests in close cooperation with the Member States.

Who to involve: EU institutions (EEAS, EU Ambassadors), EU Member States (Embassies, public diplomacy events), Indian diplomatic communities, key regional stakeholders, leading academic institutions, think tanks and even schools on the Indian side to ensure listening to a wider range of views.

Theme: Climate change and environment

According to most experts, climate change is the foremost key theme where a lot of synergies could be found, and more joint initiatives taken. It is strongly connected to the themes of development and green energy.

Policy aims:

- to develop a greater synergy between the various key actors from India and the EU and address a general lack of policy guidance from the academia and scientific exchanges.
- to further promote the EU's image of a global leader in the field, known for its expertise in the fight against climate change and environmental protection and capable of sharing its knowledge.

Medium to long term:

- to boost limited cooperation between the academic institutions of the EU Member States and India.
- to provide regular support to projects of relevance to India in the field.

Short-term steps:

- to organise an EU Delegation-led series of regular brainstorming and follow-up committees formed between representatives of the academia and research institutes from India and the

EU Member States and EU institutions to co-develop and suggest relevant areas of cooperation.

- to continue those public diplomacy activities that received positive feedback and media coverage.
- to establish a network of EU-India Research Hubs in climate and environment across different leading universities (in the capital and in regions).
- to establish and support a network of alumni of the joint research projects in the field run by local key actors.
- to ensure high media visibility of these networks and EU public diplomacy initiatives through the interactive online platforms.

Who to involve: EU institutions (EEAS, EU Ambassadors), EU Member States (Embassies, public diplomacy events), Indian diplomatic and business communities, leading academic institutions and think tanks, regional and local key actors in the field.

Theme: Cultural diplomacy and educational exchanges

The channels of cultural and education diplomacies are perceived as important in advancing a more positive image of the EU in general but are not sufficiently operational between India and the EU.

Policy aims:

Although a range of policy programmes are being pursued with some of the EU Member States, there is a need for greater concerted EU-India engagement in cultural terms in the short to long timeframe. Such cooperation would both enhance the visibility of the EU in India, but also provide support to developing India's own cultural resources. Reaching out at a more local level by furthering cooperation with local cultural actors could give a significant impetus to bilateral ties and mutual understanding. The same is true for the educational sector where the EU has the potential of gaining higher visibility.

Medium to long term:

- to promote the EU-India dialogue on cultural issues and cultural management;
- to initiate some forms of cooperation reflecting on Europe and India's cultural diversity to further help increase the EU's visibility, by taking on a more "listening" role as well as fostering best practices in both ways;
- to promote the image of the EU as a destination for educational needs;
- to deepen cultural exchanges with second tier cities, which are considered to be at the heart of traditional and creative Indian folk art;
- to develop European cultural programmes targeting school students and the general public to increase the EU's presence in the long run.

Short-term steps:

- to invest into more cultural, educational and people-to-people exchanges between the EU and India at college and school levels, and specifically in the post-COVID period when public diplomacy people-to-people contacts have been limited;
- to continue with successful cultural outreach using digital tools (e.g. free online EU Film Festivals; or online European Education Fair) reaching to the general public across regions;

- to expand the arsenal of digital tools for cultural and education diplomacy developed during the COVID years.

Who to involve: 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.

Theme: Strengthening the local outreach and raising awareness in other thematic fields

The EU continues to be recognised for its successes across a range of policy areas notably in regional integration, but it should seek to become more visible in other areas of engagement by broadening the ambit of its activities and diversifying the category of stakeholders involved. The more positive perception of the EU since 2015 has been partly attributed to the fact that India has recognised over the past few years that the EU can be an effective partner in areas such as development, health or connectivity where there is room for further complementarities in the mid- to long run. Indian stakeholders emphasise India's developmental goals – to be achieved through industrial development as well as innovation, particularly in health (pharma) and ICT – the areas where the EU is expected to be a norm-setter in the near future.

Policy aims:

Promote EU norms and standards in communication, health, and digital technologies, promoting the image of the EU as a norm-setter and leader in the field and communicating these norms/EU standards to Indian partners.

Devise and implement public diplomacy strategy to increase the awareness about the EU in the regions of India. The EU should also endeavour to continue to target areas where it has lost some visibility amongst public opinion over the past few years such as in advancing innovation and technological progress.

Medium to long term:

- To engage with Indian key audiences through a more bottom-up approach. The bureaucratic bottlenecks in India, which sometimes impede further progress in bilateral ties could be resolved;
- To provide Indian partners with expertise in achieving EU standards and meeting regulations;
- To promote cooperation between India and individual EU Member States in relevant industrial sectors under the aegis of EU developmental projects, thus, increasing the visibility of the EU in the business sector and reaching out to broader local audiences;
- to ensure that part of the EU public diplomacy actions consider the more local dimension of India both through the media but also through greater contacts with the local elites and the general public would be of key importance to strengthen the EU's visibility in the longer term.

Short-term steps:

- to develop a high-visibility highly interactive online platform hosted by the EU Delegations where information about the EU presenting itself in the context of direct interest to EU-India ties could be readily accessible, including details on future EU plans and ongoing projects in India, such as fellowships or academic cooperation, developmental and industrial projects;

- to include more systematically key regional stakeholders, academic institutions, schools and think tanks on the Indian side to incorporate a wider range of views; to engage more with those local Indian influencers and key media representatives who will be playing an instrumental role in setting up the future narratives of the country;
- to continue to invest more in raising awareness about itself, but also about its strategic role vis-à-vis the individual EU Member States in India. A clearer strategic emphasis on the EU practices and role vis-à-vis the Member States would help in raising its general profile in India, including areas where the EU Delegation should profile itself as an ambassador for all the Member States and where/when should it project a message of being the complement and support of Member States' actions;

Who to involve: EU institutions (EEAS, EU Ambassadors), EU Member States (Embassies, public diplomacy events), Indian diplomatic and business communities, key regional stakeholders, schools, academic institutions, think tanks, local influencers in the targeted areas.

1.6. Indonesia

This Country Chapter presents a synthesis of the Indonesia-specific findings of traditional and social media analysis; interviews, focus groups and public opinion survey conducted in the framework of this study. The structure of the chapter follows the logic of the research design. We present the main findings for Indonesia according to the research criteria applied indicators guiding the 2021 Study: – namely visibility, actorness, local resonance, and norm-setting. Moreover, in the section on actorness and local resonance, we also discuss these research criteria findings according to the themes analysed in this study: economy and trade; political issues; development; social issues; environment; energy; science, research, and technology; culture; education; and health (new perspective). The penultimate section looks at the drivers behind perceptions of the EU and Europe in Indonesia. We conclude the chapter with recommendations for the EU's public diplomacy in 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 interviewed for this study³⁵ 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).

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 that the present extent of the EU presence in Indonesia is insufficient. The EU as a development actor is overshadowed by China, the USA, and Japan –actors with a longer and more consistent presence as economic, political or development partners in Indonesia. Experts and focus

³⁵ Experts profile is detailed in *Interviews and focus groups* section of the present chapter.

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, promoting secularism, and improving the local education system. However, certain aspects of EU norm-setting activity in Indonesia evoke mixed perceptions. The EU is seen as unreasonably aggressive in its projection of norms (in particular, criticism of the death penalty).

1.6.1. Sample

Public opinion

The online survey was coordinated and conducted by PPMI through an online panel provided by *Syno International*. The respondents in Indonesia were surveyed in Indonesian (Bahasa). Data collection took place from 28 April to 16 May 2021. The sampling for the survey was designed to be nationally representative by age, gender, and regions. Respondent profiles in Indonesia were established based on data from Statistics Indonesia¹⁶. The survey included a total of 1133 individuals aged 15- to 64-year-old¹⁷.

Media

The quantitative part evaluating the general trends in a large press media sample was carried out by PPMI. Five prestigious media outlets *The Jakarta post*; *Antara*¹⁸; *Jawa Pos National Network*; *Koran tempo*; *Indonesia Government News* and one business newspaper *Investor Daily* were monitored from 1 February to 30 April, 2021. The *Factiva* repository was used to aggregate content from both licensed and free sources, and in-house data processing was applied to produce the results.

Two separate datasets in English and Bahasa Indonesia languages were collected over the period of observation – «EU» (490 articles) and «Europe» (1554 articles). Search terms for the dataset "EU" are: "European Union", "EU", "European Commission", "European Parliament", "Court of Justice of the European Union", "EU presidency", "EU Council", "European Council", "Council of the European Union", "Eurozone", "European Central Bank", "European Investment Bank", "European Medicines Agency". The search terms for the dataset "Europe" are "Europe", "European" and "Europeans". The search terms for "EU" and "Europe" datasets consider both plural and singular forms as well as possible grammatical forms of the search terms in the local language. Europe dataset excludes articles containing any of the "EU" dataset keywords.

The qualitative media content analysis was designed, supervised, and coordinated by experts from Public Diplomacy and Political Communication Forum (PD-PCF), University of Canterbury (UC), New Zealand, and conducted by local researchers trained by the PD-PCF. PPMI collected the media sample (48 articles) using the search engine from two prestigious outlets *The Jakarta Post and Antara* and one business newspaper *Investor Daily* for country experts for in depth qualitative analysis. The exact timeframe of observation remained the same. Experts analysed the EU image created by applying elements of content, cognitive and critical discourse analyses.

Social media

PPMI carried out the social media analysis. The data collection process was automated using the online social media monitoring tool *Mediatoolkit*. Social media posts were collected from Twitter, Facebook and

¹⁶ Statistics Indonesia: <https://www.bps.go.id/>

¹⁷ Detailed public opinion survey data are available in Annex II of this Report – Comparative public opinion survey report.

¹⁸ *Antara* is a national press agency. Its news site is available in English and Indonesian language versions and is a popular source of information in Indonesia. The rest of the media included in the sample are newspapers.

Instagram with the use of automated queries. Coverage of the EU was traced using a set of the EU-related keywords: “European Union”, “EU”, “European Commission”, “European Parliament”, “Court of Justice of the European Union”, “CJEU”, “EU presidency”, “EU Council”, “Council of the European Union”, “European Council”, “Eurozone”, “European Central Bank”, “European Investment Bank”, “European Medicines Agency”. All the keywords were additionally traced in one-word format to capture related hashtags: `europeanunion`, `europeancomission`, `europeanparliament`, `courtsofjusticeoftheeuropeanunion`, `eupresidency`, `eucouncil`, `europeancouncil`, `counciloftheeuropeanunion`, `europeancentralbank`, `europeaninvestmentbank`, `europeanmedicinesagency`. Europe-specific keywords used for filtering relevant social media posts are “Europe” and “European”. Europe dataset excludes posts containing any of the “EU” dataset keywords. Additionally, a location filter was used to ensure that the collected mentions originate from Indonesia. A language filter was set up to collect posts in English and in Indonesian.

The resulting sample of Indonesian social media posts collected from 1 February to 30 April 2021 includes 70319 mentions, of which 15088 are of the EU (55% of which in Indonesian language) and 55231 of Europe (83% of which in Indonesian language).

Working with social media platforms, the Project Team followed each platform’s terms of use. All identifiable information of individuals from social media data remains confidential and is removed before the publication of findings. Computational analyses of the samples involve only contents from media databases’ public websites – posts that are available to general audiences. No generalised conclusions that might cause any potential harm to identifiable communities are drawn from social media analysis.

Interviews and focus groups

Interviews with local opinion- and decision-makers as well as focus groups with students were conducted by the Country Experts, with training support and supervision from PD-PCF, UC, following the approval of the UC Human Ethics Committee. As part of this study, interviews and focus groups aim to provide in-depth explanations about Indonesian perceptions of Europe and the EU and cross-reference the findings from the public opinion survey, traditional and social media analyses.

The interviewees sample includes 12 interviewees (10 males and 2 females) aged in between 30-and 60 years old and from various professional backgrounds including university lecturers, researcher, civil servant, 2 journalists, IT and oil industry professionals, international organization employee, film industry representative and a member of parliament. All interviewees have international experience and are familiar with European Union or individual European countries via their working experience (3 persons), study or travels.

Eight undergraduate students (3 females and 5 males) of diverse disciplinary backgrounds (media studies, computer sciences and international relations) from Bina NUSntara University took part in the focus group. Four of them have visited the EU or have strong awareness of the EU through interaction with their relatives and friends who live in EU countries (the Netherland, Germany, Belgium and France). One IR student participated in a student exchange programme.

1.6.2. Visibility

In the eyes of the Indonesian public, the EU is a prominent actor equalling Japan, China and the US. Almost 100% of respondents declare their awareness of the EU. The terms most often associated with the EU are modern (chosen by 68.2% of respondents), strong (49.5%), united (44.6%), peaceful and efficient (42% and 37.5%).

Japan overscores the EU in five of the seven positive descriptors the respondents survey choosed from (compared to two for the US (modern and strong) and one for China, Russia (strong for both), India, and South Africa (multicultural)).

The EU is seen as much less aggressive than most of the countries the respondents are invited to share their opinion about except for Brazil. Thirteen per cent of respondents in Indonesia see the EU as aggressive compared to China (37.8%), US (35.6%), or Russia (29.7%). The EU is also seen as much less arrogant (5.5%) compared to the US (33.1%), China (23.2%) or Russia (11.2%).

The EU is regarded as a highly well-performing actor across all fourteen domains of economic, social and cultural activities included in the public opinion poll questionnaire (i.e. industrial development, green technologies, financial services and banking, space exploration, tourism, agriculture)¹⁹. Eighty per cents or more of respondents in Indonesia see the EU performance as “very good” or “fairly good”. In the eyes of the Indonesian public, the EU image is strongly associated with research, science, technology, and industry. These positive perceptions correspond with the perception of the EU as a modern entity. Industrial development, medical research, tourism, science and research and the development of new technologies is seen positively by more than 90% of respondents. The experts and focus group participants believe that cooperation with the EU in industrial development, medical research, tourism, science and research, and new technologies can contribute to the Indonesian development.

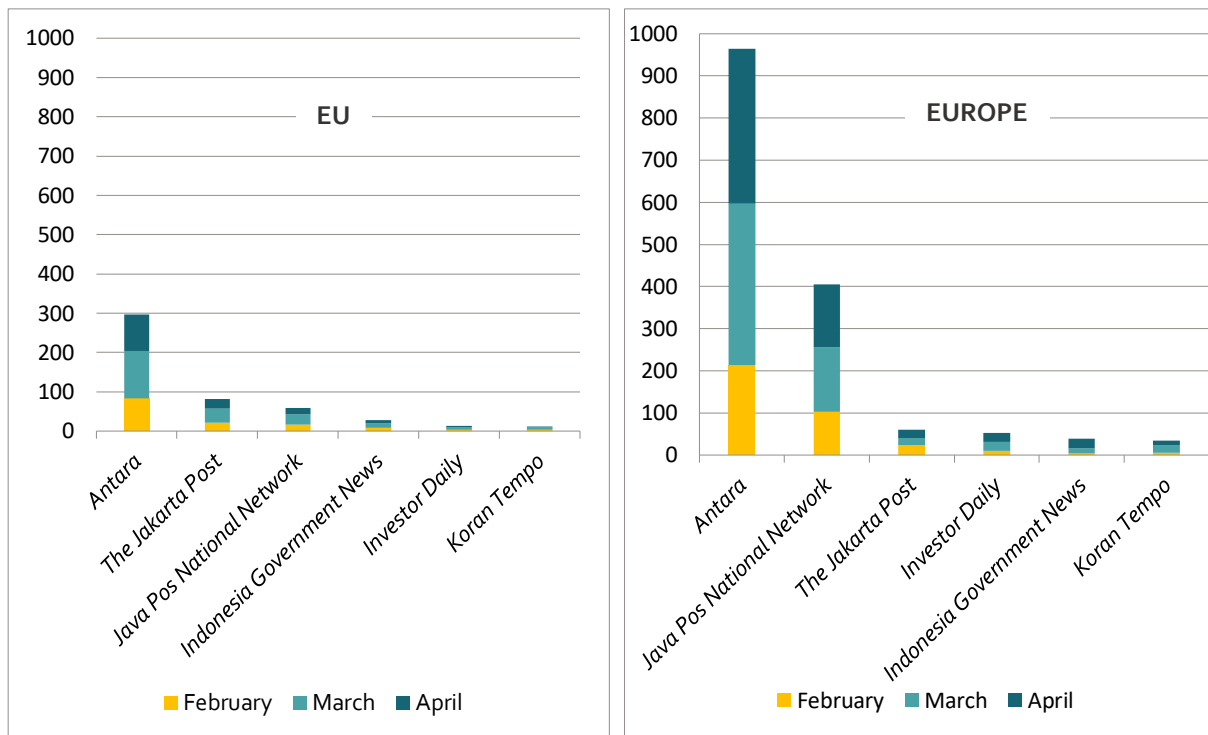
The public in Indonesia is informed about the EU unequally. About 30% of respondents declare they hear of the EU rarely or never. Over 56% of Indonesians hear about the EU at least once per week, and 14% once per month. The experts interviewed for this study interact with the EU through work, study, or social interactions daily. Focus group participants get their knowledge of the EU through their studies, participation in activities organized in Indonesia by the EU Delegation and EU Member States diplomatic representations, travels, and social media.

Media in Indonesia prioritizes Europe over the EU in their materials. During the three months of observations – from February to April 2021 - 76% of all the press articles reporting on European affairs referred to Europe and 24% to the EU and its institutions. The EU had a slightly higher media visibility in March, with 41.8% of all the articles referring to the EU or its institutions published that month, 30% in April and 28.2% in February. Coverage for “Europe” was significantly lower in February (23.1%) than in March (38.9%) and April (38%). In both datasets, *Antara*²⁰ had much higher coverage than the other five newspapers. For the “Europe” dataset, *Java Pos National Network* also generated higher coverage than the remaining newspapers.

¹⁹ Detailed results of the public opinion survey are presented in Annex II to this report– Comparative public opinion survey report, Frequencies tables.

²⁰ As Indonesia’s national news agency, Antara supplies news reports to many domestic media organisations. It is also the only organisation authorised to distribute news materials produced by foreign news agencies, such as Reuters. Antara is published in English and Indonesian.

FIGURE 46. VOLUME OF NEWS ITEMS WITH A REFERENCE TO THE EU AND EUROPE IN TRADITIONAL MEDIA. INDONESIA



Note: based on automated quantitative data analysis. Includes press articles which report on the EU and Europe as a principal or secondary subject of the article.

Interest in European and EU affairs across six leading Indonesian media outlets is unequal. *Antara* has published over 75% of all the materials reporting either on Europe or the EU (296 of 490 and 964 of 1554 articles, respectively).

The *Jakarta Post*²¹ follows *Antara* in a total number of articles covering the EU (95) and the Java Pos National Network in articles reporting on Europe (405). *Java Pos National Network* also has 59 articles reporting on the EU during the period of observation. Other media demonstrate a diminishing interest in European and EU affairs. The two media outlets – *Antara* and *Jakarta Post* - published 80% of all the materials reporting on the EU.

The degree of major centrality for EU articles is meagre for all traditional media outlets (under 10%), except for *The Jakarta Post*. Approximately 18.6% of articles portray the European Union as a central theme of the material. The readers of the *Jakarta Post* include largely foreigners (expatriates) and a certain number of Indonesians, including decision-makers and members of the public. EU related articles in *The Jakarta Post* are usually published either in the international news or opinion sections.

Like in conventional media, Europe visibility in social media was higher than that of the EU. The volume of posts throughout observation is not spread uniformly. The peak in Europe-related posts on 18 April (6500 posts in one day compared to regular 500-1500 posts daily) is linked to the news on the establishment of the European Super League. A peak in the number of EU related post (1100 compared to under 400 daily) on 11 March is linked to the post by the EU Ambassador to ASEAN describing joined sports activity by the members of diplomatic corps in Indonesia. Another peak on 18 April (570 posts)

²¹ The Jakarta Post is a credible English-language newspaper owned by the Kompas-Gramedia Group.

is related to a social media post commenting on the Multi-Stakeholder and Policy Dialogue Series officially launched in early March 2021 by Governor of Jakarta Anies R. Baswedan, and Ambassador of the European Union to Indonesia, H.E. Vincent Picket.

The last peak on 28 April (1200 posts) is generated by a tweet discussing an Indonesian person working for one of the European companies who appears to have a higher-than-average income. The tweet suggests that European companies and Europeans are prosperous.

Visibility of the EU Member States, MSs' leaders', EU institutions, and EU leaders

In both the "EU" and "Europe" media articles sets, European Commission (39 articles) and European Central Bank (32) are the most visible EU institutions. The media pays slightly less attention to European Medicines Agency (21), European Council (10), European Parliament (8) and European Investment Bank (8). The European Commission is mainly referred to in articles reporting EU palm oil import restrictions and the COVID-19 vaccine supplies. The European Central Bank is mentioned in relation to the Euro exchange and interest rates.

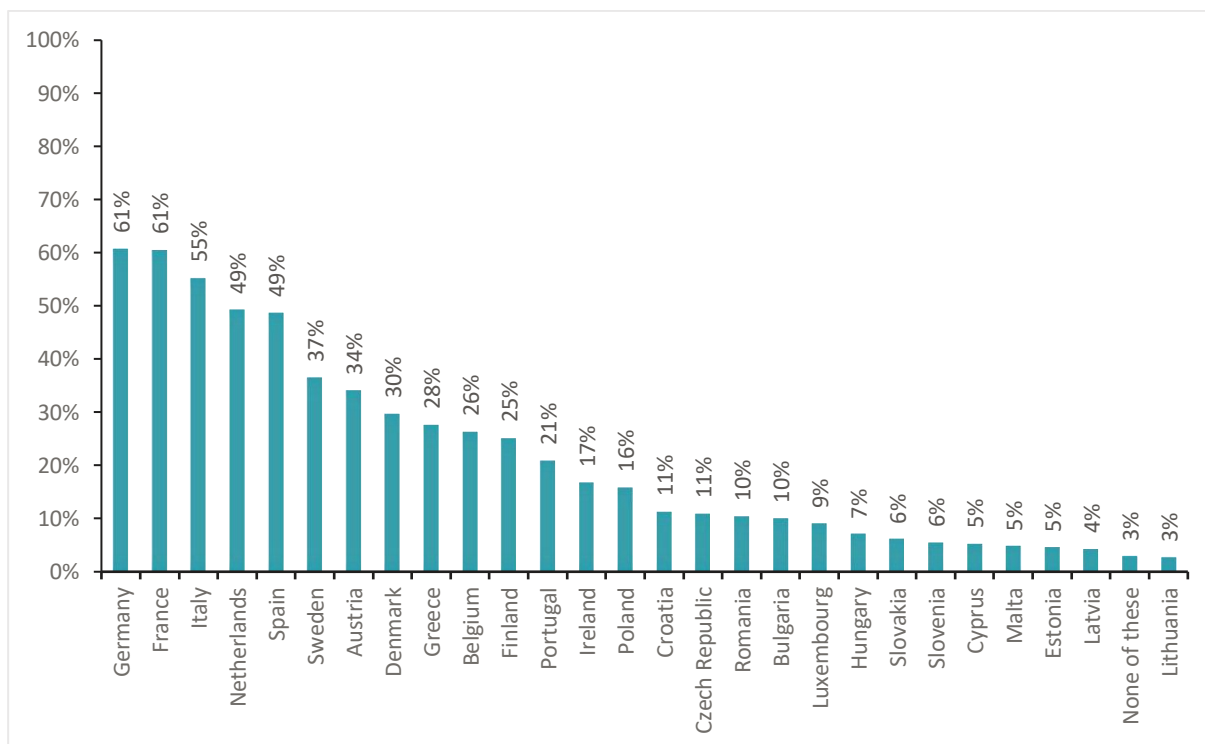
The Indonesian press rarely mentions the EU officials and individual EU Member States leaders. The two most mentioned politicians - chancellor of Germany Angela Merkel and president of France Emmanuel Macron have just under 20 mentions each (18 and 17 respectively). President of the European Central Bank Christine Lagarde has 8 mentions and European Commission President Ursula Von Der Leyen 7.

In the articles covering the EU as a central theme, the most mentioned Member States are France, Germany, the Netherland, and Belgium. Germany and France are more visible in reportage on EU-specific issues such as the availability of vaccines, the impact of Brexit on the EU and EU external policy, including the EU Strategy for Cooperation in the Indo-Pacific and restrictions on Indonesian palm oil imports to the EU. The several EU Member States, including Germany and France, are mentioned in materials reporting on COVID-19 vaccines procurement and distribution.

Each Member State is mentioned within the corpus of Indonesian *social media* posts. The most often mentioned MSs are Denmark (1400), Italy (1132), Germany (1085), and Spain (807). Denmark stands out as the only Member State mentioned mostly in the EU-related feed. This is linked to mentions about Denmark's decision to suspend the use of AstraZeneca vaccine despite the EU drug regulators confirming that the vaccine is safe.

The European Commission is the most visible of the EU institutions, with 174 mentions in Indonesian *social media*. A considerable share of public attention is paid to the European Medicines Agency (126), followed by the European Central Bank (81) and the European Parliament (61).

FIGURE 47. ATTRACTIVENESS OF THE INDIVIDUAL EU MEMBER STATES. INDONESIA



Note: based on Q25: Please indicate which European countries look the most attractive to you? Respondents could choose more than one country (n=1133). Respondents were not limited in the number of countries they could name.

In the eyes of the Indonesian public, European Commission and European Central Bank are the institutions associated with the EU the most. The European Commission epitomizes the EU in public opinion, and the ECB is associated with Euro, which has been gaining in popularity as the currency for keeping individual cash savings.

In the eye of Indonesian public opinion, Germany, France (61% for both) and Italy (55%) are the most attractive EU Member States, reflecting the volume of media publications mentioning them. They are followed by Netherlands and Spain (49%), Sweden (37%) and Austria (34%). Interviews and focus group discussions indicate that perception of individual Member States’ attractiveness corresponds with the public awareness.

The professionals base their opinion of the EU and individual Member States on personal experience of studies, work, living in the country, or professional interactions. The youth opinions are based on the experience of short visits or studies in the EU.

EU Delegation and individual Member States also support the knowledge run activities and programs in Indonesia, including Europe on Screen film festival or scholarship programs. Netherland, France, Belgium, Italy, Germany - are leading among the focus group participants as the most attractive and representative of the EU. Germany is recognised for its technological development, high-quality products, and hard science education while France and Italy are mentioned in relation to arts, fashion, films and food.

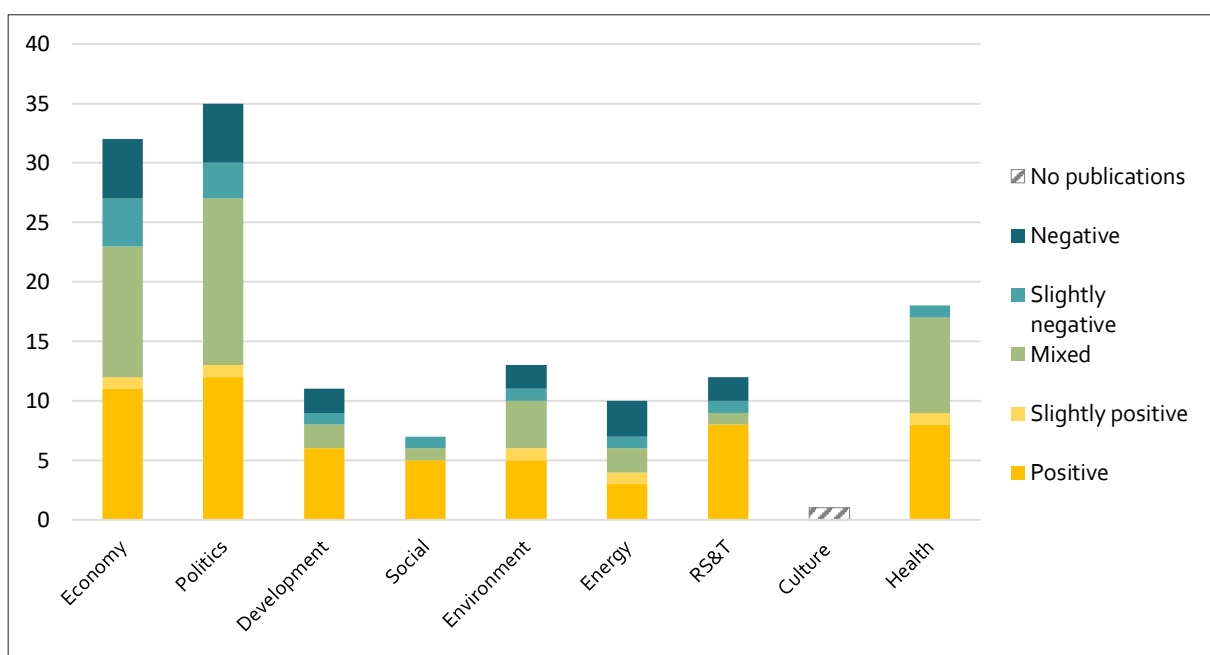
Emotive charge

In the Indonesian language press, the EU is competing in media reportage with other international actors US, China, and Russia, UN, WTO, WHO. The share of the EU press materials which cover the EU

as a principal subject is only 3%. Emotive presentation of the EU in media articles depends on the issue in focus, the pattern of interaction and the actors involved. The EU is reported on positively when its actions are perceived to benefit Indonesia. Positive coverage includes materials on the EU strategy in Indo-Pacific, EU cooperation with the WHO in response to COVID-19 pandemic, EU-Indonesia CEPA Negotiations, the EU readiness to help Myanmar to restore democracy. The coverage is negative and/or ambiguous in materials related to EU sanctions towards Myanmar, Russia, and China. In thematic frames most visible in Indonesian press – politics, economy, and health, mixed or slightly negative emotions prevail in the articles which present the EU as a principal subject. Thematic frame with the highest share of materials presenting the EU in a positive tone is research, science, and technology.

In social media, an emotive charge of the EU-related posts was almost evenly spread between positive (36%), negative (34%), and neutral (30%). Europe was mentioned in a positive light more often (50%).

FIGURE 48. EMOTIVE CHARGE IN PRESS ARTICLES REPORTING ON THE EU AS A PRINCIPAL SUBJECT. INDONESIA



Note: Based on qualitative media analysis conducted by country experts. One article can reflect more than one theme.

Continuity and change behind visibility and emotive charge

Indonesia was not included in the 2015 Study. The conclusions presented here are based on literature, interviews and focus group discussion.

Given the limitations owing to the existing lack of a comprehensive study on EU-Indonesian bilateral relations, it is challenging to evaluate the evolution of perceptions on the EU in Indonesia. Historical, cultural, and colonial encounter with Europe has affected perceptions of the EU in the long-term (Luhulima, Panjaitan & Widiiana, 2009), while the ongoing relationship shows opportunities for change. At present, the overall image of the EU in the public eye is positive, although it may be overshadowed by other actors with a longer presence in Indonesia.

The press materials presenting the EU as a principal subject give the EU reportage a balanced emotive charge. In all thematic frames, the number of negatively toned articles is smaller than the number of

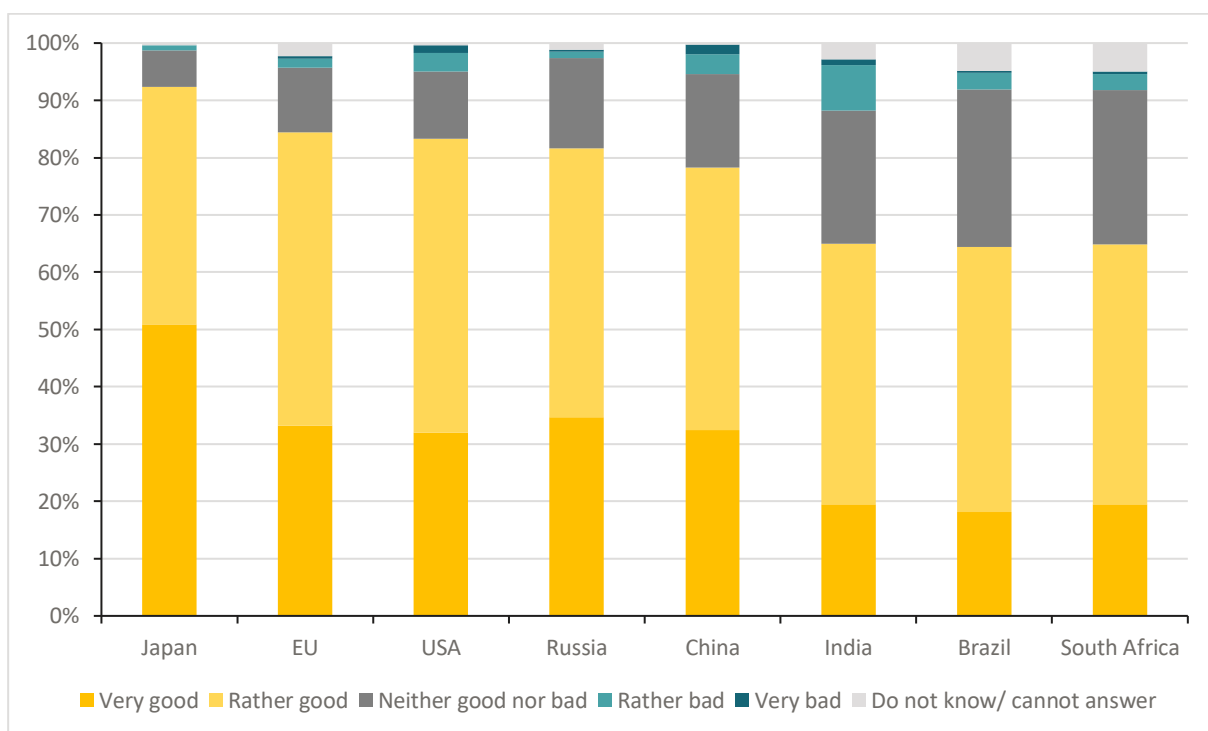
articles reporting on the EU in a negative tone. Although the EU press coverage concentrates on politics and economy, the key target groups in this study read the EU related materials selectively. For the youth, the issues considered to be in high politics attract less attention than lifestyle and opportunities. The topics of interest for the youth include opportunities for studies funding, fashion, film. However, some focus group participants also name Brexit and migration issues as points of interest. Experts note the limited knowledge of the EU among the Indonesian public. Experts’ opinions are significantly influenced by personal experiences of work or study in the EU or contacts with European companies or persons in Indonesia. Experts mention the rise of nationalism inside the EU and visible xenophobia towards persons of non-European origin as the factor that may negatively impact future EU-Indonesian relations.

1.6.3. Actorness and local resonance

The EU as a partner.

Public opinion in Indonesia sees the EU as a valuable partner for the country. It is preceded only by Japan in estimating the quality of bilateral relations and is followed by the US, Russia, and China. Overall, the public in Indonesia evaluates the country’s relations with external partners very positively. Eighty-four per cent of respondents in Indonesia see their country’s relations with the EU as “very good” or “rather good” (92% for Japan). The US (83%) and Russia (82%), and China (78%) follow the EU closely. Relations with all the countries mentioned in the survey questions are seen as “very good” or “good” by 65% of respondents or more.

FIGURE 49. EVALUATION OF INDONESIA RELATIONSHIP WITH THE EU AND OTHER COUNTRIES



Note: based on Q3: Which of the following words best describes your country’s overall relationship with each of the following countries and organisations? (n=1133)

Between 84% and 91% of respondents in Indonesia see the EU as an essential partner for the country in different aspects of bilateral cooperation. Ninety-one per cent of respondents either “strongly agree” or

“agree” that the EU is an important partner for Indonesia in international relations, 89% - in educational exchanges, 85% see the EU as a trustworthy partner and 84% “strongly agree” or “agree” that Indonesia’s relations with the EU should be stronger.

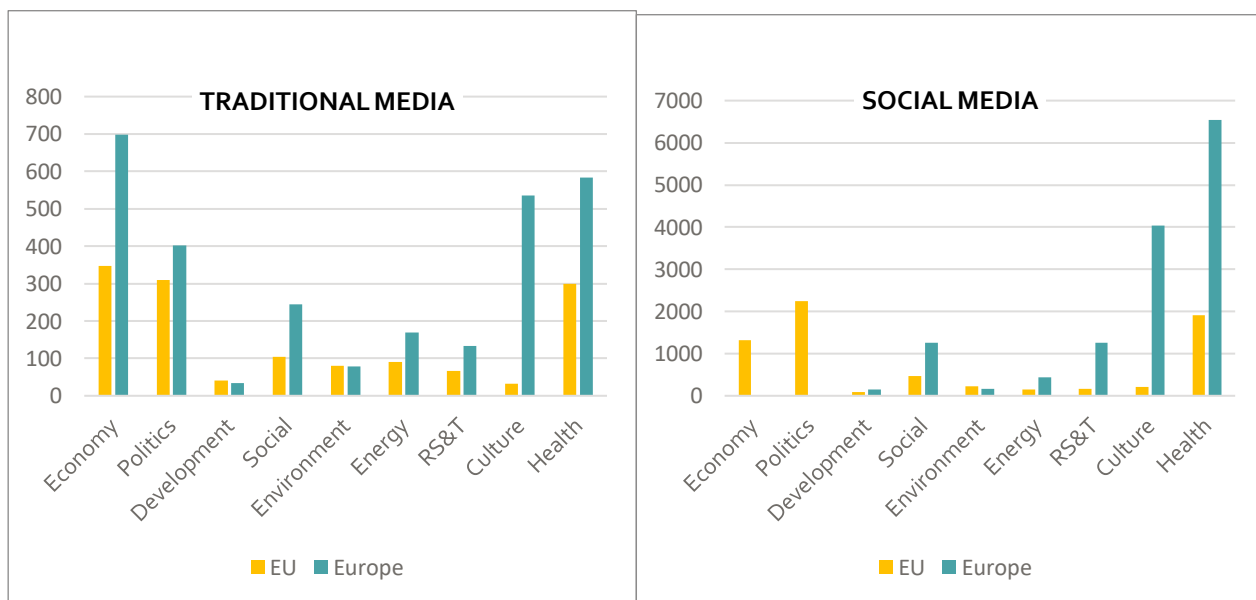
Less than 2% of respondents disagree with the evaluations of the EU as a positive partner for Indonesia.

Online media are the major source of information on the EU in Indonesia. Over 84% of respondents learn about the EU that way. Online media is followed by television (56.2%), social media (52.2%) and streaming platforms as YouTube and Netflix (43.7%). Focus group participants name social media as the primary source of information about the EU. Notably, the EU Delegation in Indonesia was selected as the source of information on the EU only by 6% of respondents.

Most media publications mention the EU resonate with the country domestic agenda or refer to EU actions in the region of South-Eastern Asia. The press reports on EU Social DigiThon 2021 (competition inviting young people in Indonesia to develop ideas for digital-based solutions to address COVID-19-related challenges) and EU support for flood and typhoon victims in the eastern part of Indonesia. EU cooperation with Indonesia and WHO on dealing with the pandemic is discussed not only in the context of Indonesia but also of Southeast Asia and globally. EU sanctions policy towards Myanmar is discussed in terms of their impact on the region.

Most media in Indonesia do not indicate the source of information on the EU. However, the quantitative and qualitative media analysis confirms Reuters as the most popular foreign source of information on the EU news in the country. Reuters was referenced 149 of 181 times when the source of information was identified in the press articles reporting on the EU as a principal subject. The Agency’s position as a dominant information source on the EU in Indonesia is defined by its cooperation with Indonesian press agency *Antara*.

FIGURE 50. THEMATIC FOCUS OF SOCIAL MEDIA AND PRESS ARTICLES REPORTING ON EU AND EUROPE. INDONESIA



Note: based on automated quantitative data analysis. Includes press articles which report on the EU and Europe as a principal or a secondary subject of the article. One article can reflect more than one theme.

In the observed Indonesian media, the EU is most often mentioned in the economy (25%), politics (23%) and health (22%) thematic frames. The same themes - economy (24%), health (20%), politics (14%) - are

reported the most frequently for Europe. The “Europe” dataset includes a significantly higher share of culture-related materials (19%) compared to the EU (2%). Among the media outlets included in this study, Jawa Pos National Network focuses the most on culture themes. In both “Europe” and the “EU” development (1-3%), science (5%), environment (3-6%), energy (6-7%), social (8%) are the least covered themes.

Economy and politics are the main themes associated with the EU and Europe in the Indonesian press. The press in Indonesia reports on EU actions and their impact (positive and negative) on Indonesia’s foreign trade. The future EU-Indonesia CEPA, European investment in the Indonesian economy (export of natural resources, mining, and consumer sectors) are presented in a positive tone. EU restrictions on palm oil, nickel ore and previously timber import and the subsequent trade disputes under the WTO dispute resolution mechanism are reported on in a negative tone. The negative EU coverage in response to EU actions perceived as harming Indonesia includes references to political sentiments. COVID-19 pandemic and EU’s vaccine diplomacy triggered a visible media coverage in health themes.

In Indonesian social media posts, the EU was most often mentioned in relation to political issues (33%) and health (28.1%). A considerable share of posts reflected the economy theme (19.4%). The share of social media posts referring to the EU in relation to politics and health is bigger than respective shares of press articles. The economy is the third most discussed theme. The themes of economy and politics in social media posts are related exclusively to the EU and not Europe.

In comparison to the EU, Europe is more often mentioned in connection with health (31%), economy (26%) and culture (19.1%), but is much less visible in the politics frame (only 9% of posts). Cultural activities held by EU Member States representations in Indonesia partially contribute to stronger association of culture with Europe.

Of the themes discussed in social media, the EU’s and Europe’s performance in economy and culture are presented in the most positive terms, performance in health, politics and support for development – mostly negatively. The EU performance in development thematic area stems from debates on drawbacks of uneven global development deepening poverty, and social injustice.

Public knowledge of the EU in Indonesia is limited. Only small fraction of Indonesians has access to information about the EU and have direct or indirect interaction with its institutions or people. Familiarity with individual EU Member States in Indonesia is higher compared to the EU. The knowledge of Germany, France, Netherlands, Italy and certain CEE countries, such as Hungary and Poland is higher than of the EU thanks to history of bilateral relations with Indonesia. Positive public opinion of the EU in Indonesia is partially based on expectations of future cooperation with the EU and future EU contribution to country’s development.

Economy and trade

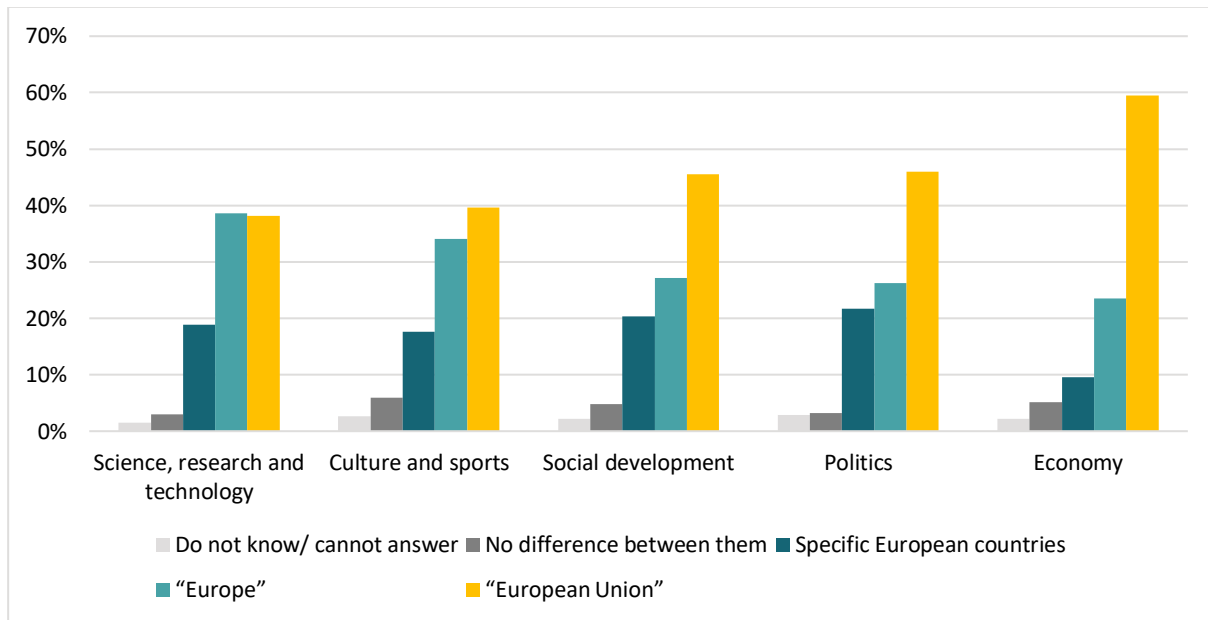
The EU overperforms Europe as an entity associated with the different areas of activity, including politics, economy, social development, culture, and sport. Fifty-nine per cent of respondents see the economy as the most noticeable facet of the EU; 23.6% of respondents associate it with Europe and only 9.6% with individual European countries (.Figure 51). And over 90% of respondents in Indonesia see the EU as an influential actor in the global economy (see Figure 52).

For all the other domains – politics, social development, culture and sports and science, research and technology, the share of respondents who associate them with the EU is less than 50%. Forty-six per cent of respondents associate the EU with politics and social development (under 30% with Europe in both cases). The shares of respondents seeing ties of the EU and Europe with culture and sports and science, research and technology are most comparable. Under 40% associate the EU with culture and

sports and science, research, and technology, while over 35% associate Europe with culture and sports and slightly under 40% with science, research and technology.

The EU almost equals the US, China, Japan, IMF and WTO in perception as an important global actor. However, the EU is seen as ‘very influential in the global economy by slightly over 50% of respondents compared to over 65% in the case of China and over 70% for the US.

.FIGURE 51. ASSOCIATION OF DIFFERENT AREAS TO THE EU VERSUS EUROPE. INDONESIA

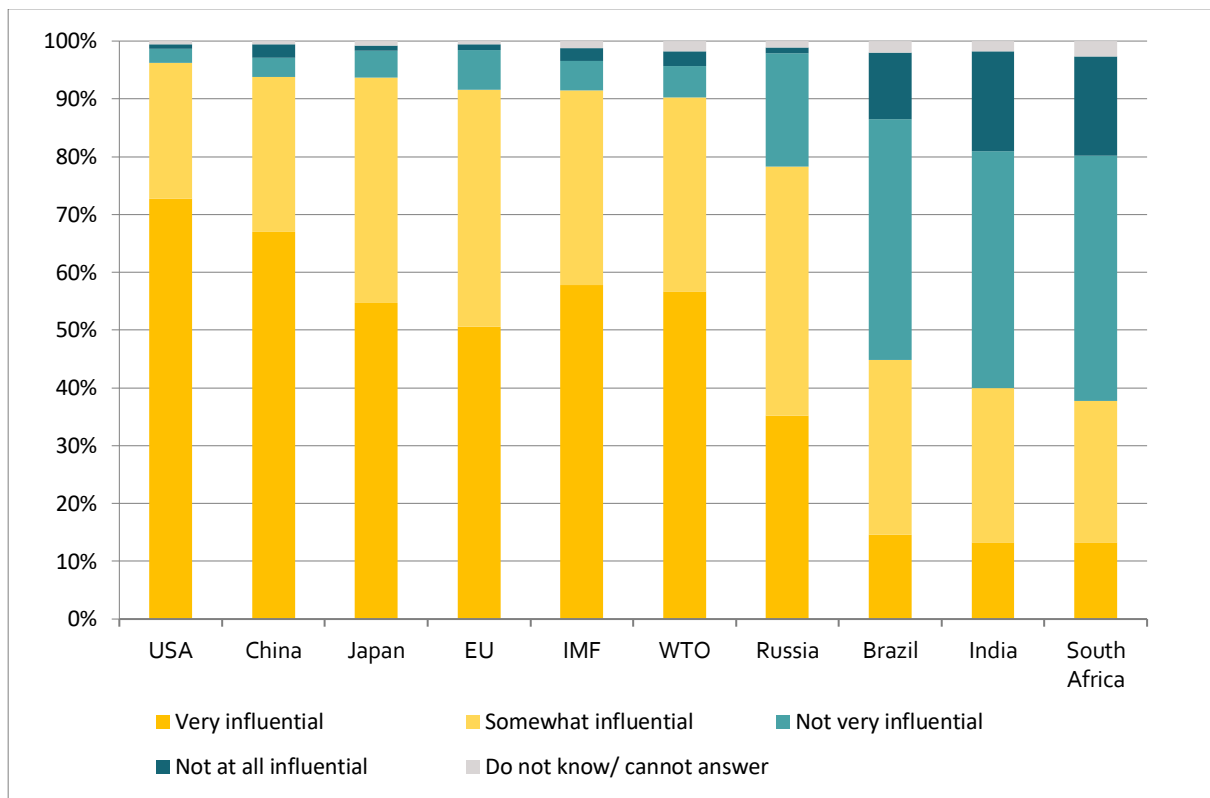


Note: based on the answers to Q22: Some people think about Europe, whereas others think about the European Union when talking about economy, politics, culture, sports and other areas. In your case, which term – Europe or the European Union - comes to your mind first when you think about the following subjects? (n=1133)

Economy and development are the themes most visible in EU press coverage in Indonesia. The press, in particular, reports on the EU-ASEAN cooperation. Press also covers future Indonesia’s economic engagement with EFTA countries under the Comprehensive Economic Partnership Agreement.

Experts in Indonesia attribute importance to the economy due to the EU trade and investment relations with Indonesia and their impact on the development and modernization of the country. For the youth, the theme of the economy has an association with material attributes of well-being such as European products - cars and food. Due to that associative connection, the EU economic ties with Indonesia support its cultural influence via European products export to Indonesia and lifestyle promotion.

FIGURE 52. EU INFLUENCE IN GLOBAL ECONOMIC AFFAIRS COMPARED WITH COUNTRIES AND INTERNATIONAL ORGANISATIONS. INDONESIA



Note: based on the answers to the survey Q6: In your view, how influential, if at all, in global economic affairs are the following countries and organisations? (n=1133)

A substantial majority (between 80% and 90%) of respondents in Indonesia see the EU as an important trade and investment partner for the country and believes that the EU should have closer economic ties with Indonesia. However, slightly over 50% of respondents believe that the EU “is protecting its market at the expense of others”. The reservations toward the EU can be related to the highly sensitive palm oil imports dispute. The focus group participants believe the EU forces an unreasonable burden on Indonesia. ‘Indonesia has been trying to comply with the EU standards, but it is still considered insufficient. EU should understand Indonesia more’.

In the opinion of one of the experts, while Indonesia is open to cooperation, the EU does not seem to regard Indonesia as a priority, possibly due to its geographical location and insufficient knowledge of Indonesia’s potential. The EU is seen as unreasonably dependent on certain Asian and African countries in its economic strategies, leading to its vulnerability. In experts view, the EU is “overdoing” market protection employing tools as an import ban on Adidas shoes made in Indonesia and airline ban, in addition to palm oil import restrictions.

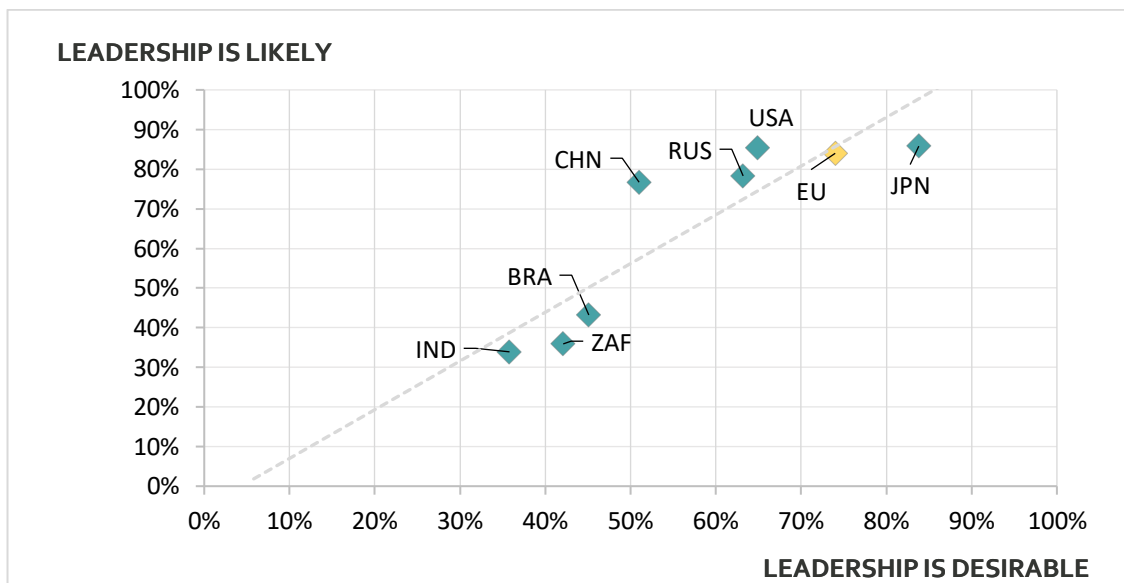
The focus group participants share the view of the EU as a key global economic actor and important economic partner for Indonesia (One of the focus group participants expressed expectation of the EU to act as an intermediary in the US-China trade disputes settlement). Students as the experts criticise the EU’s position on Indonesia’s palm oil import.

Politics

Politics is a theme associated with the EU in the eyes of Indonesian respondents (46% versus 26.2% with Europe and 21.8% with individual European countries). The EU is considered among the leading global actors.

In the eyes of the Indonesian public, Japan is the most desirable global leader (over 80%). It is followed by the EU (over 74% see its global leadership as desirable), the US and Russia (over 60% for both) and China (slightly over 50%). The global leadership likelihood in the public eye is practically equal for the EU, the US and Japan (Figure 53). However, the share of respondents who believe that the US leadership is very likely (55%)²² is more significant compared to the EU (46%) and Japan (47%). The three actors – Japan, the EU and the US, are the most competent and positive international actors in the eyes of the Indonesian public (see Visibility section of this chapter).

FIGURE 53. DESIRABILITY VS. LIKELIHOOD OF EU GLOBAL LEADERSHIP COMPARED TO OTHER ACTORS. INDONESIA



Note: based on Q4: How desirable is that each of the following countries and organisations take a strong leadership role in world affairs? And Q5: how likely or unlikely is it that each of the following countries and organisations will take a strong leadership role in world affairs five years from now? (n=1133). The horizontal axis presents the sum of “Very desirable” and “Somewhat desirable” responses to the Q4. The vertical access presents the sum of “Very likely” and “Rather likely” responses to Q5.

The public in Indonesia sees the UN and the EU as almost equally important actors in maintaining global peace and stability (93% and 92% of respondents believe them to be very or somewhat important in this area). Japan, NATO, Russia, and the US closely follow the UN and EU (around 90% each). Over 80% of respondents also see China as an important peace actor.

Indonesian public positively evaluates EU performance in global political and social affairs. Between 89% and 76% of respondents estimate the role of the EU in global political affairs as ‘very good’ or ‘rather good’. The most positive estimations are of the EU role in support of regional cooperation, fighting climate change, peacekeeping and diplomacy and development cooperation. The lowest (76%) the role in dealing with refugees and displaced persons.

²² In Figure 53 the horizontal axis presents the sum of “Very desirable” and “Somewhat desirable” responses to the Q4, and the vertical access presents the sum of “Very likely” and “Rather likely” responses to Q5 of the public opinion survey.

The local media support the EU image as an important political actor in Indonesia. The Head of EU Delegation in Indonesia is typically presented in the media alongside high Indonesian officials (e.g. Indonesian ministers, the Governor of Jakarta and Central Java) and other public figures of significance - Indonesian businessmen, artists or activists during the meetings other official events.

The experts appreciate the EU's legal culture and democratic accountability standards. However, there is a very high sensitivity of the EU's tendency to "lecture" Indonesia on implementing human rights, particularly EU criticism of the death penalty in Indonesia and the sharia law. The experts point to the need to consider the local cultural traditions and demonstrate respect to local sensitivities.

Some focus group participants expressed that the EU's internal crises (including Brexit and the migration crisis) undermine its capacity as an international actor.

Climate and environment

Indonesian media covers environmental issues quite actively. Coverage on Indonesian palm oil issues dominates the theme. Emotive charge of these materials is diverse. Qualitative media analysis reveals that just over 50% of press articles in the environment theme present the EU in a mixed or negative tone²³ (Figure 48) with about 50% of materials positive. Furthermore, due to its broad impact in Indonesia, the palm oil export features in different thematic frames in the EU press coverage. These areas include economy (impact of the palm oil import ban to the EU on government revenues in Indonesia, standardization), social (jobs and employment, local community development), regional development, and deforestation, which contributes to negative or mixed tone coverage of the EU.

The regulatory barriers to palm oil import to the EU impact agriculture and related domains of economic activity in ASEAN and Indonesia. And the palm oil products import barriers introduced by the EU have been a subject of the WTO dispute resolution proceedings for several years. These include anti-dumping and other measures against Indonesian biofuels import to the EU. At present, the countervailing import duties on Indonesian biofuels are in force in Indonesia.

The experts raise concerns that EU regulatory measures such as "deforestation regulation" and the initiatives introduced by individual EU Member States - Belgium and France - to ban palm oil biofuels completely will further undermine a key sector of the Indonesian economy.

Experts in Indonesia expect the ASEAN as a regional organization to resolve the issues on par with the national government. Industry representatives in Indonesia expect the Joint Working Group on Palm Oil between the EU and relevant ASEAN member countries to develop a recognition path for the Indonesia Sustainable Palm Oil (ISPO) scheme, which would lead to lifting at least part of palm oil products import to the EU. The ISPO is perceived as a policy that would support adherence to Indonesia human rights obligations (protection of indigenous population from palm oil-related land grabs), better treatment of workers and commitment to the moratorium on palm oil plantations expansion. ISPO I also portrayed as the only realistic path for Indonesia's 2.3 million small plantation holders to receive sustainable production certificates. Indonesian experts refer to the UK as a positive trendsetter in ISPO recognition.

The public in Indonesia sees Japan (94.8%), the UN (94.4%), the EU (94%) and the US (93.2%) as equally important actors in combatting climate change. The "big four" actors in fighting climate are followed by Russia and China (90% and 88%, respectively).

The public in Indonesia acknowledges the EU's role in fighting climate change (which is reinforced in public eyes by activities by the several EU Member States such as Hungary, France, Germany) and EU

²³ Based on qualitative media analysis.

initiatives aiming at contributing to the improvement of global environmental conditions. As in development actorness evaluations, a slightly more significant share of respondents sees the UN role in fighting climate changes as very favourable than the EU (64% against 60%).

On the other hand, EU's campaigns also give a new understanding of environmental issues (e.g. product certification standards, green economy). One of the experts declares appreciation for the EU contribution in Disaster Risk Reduction due to its contribution to relief provision and promoting best practices in this area. Focus group participants believe the EU has to intensify social media information campaigns promoting climate change.

Countries such as the US, China, Russia are seen in Indonesia as involved in such issues, individually using their power leverage in their bilateral relations with Indonesia and via UN forums, thus boosting their profile as global actors.

Energy

Indonesian media cover energy issues to a limited extent, concentrating on climate change or sustainable development issues, such as deforestation. The press provides minimal information on the EU investment in the energy sphere. The experts and focus group participants do not demonstrate significant interest in the theme of energy. One of the experts mentioned briefly that Chinese investment in the renewable energy sector (oil & gas) is increasing and is comparable with the investment of some European countries in Indonesia.

Research, Science and Technology

Almost equal shares of respondents in Indonesia associate science, research and technology with the EU and Europe (38.1% and 38.6%). And 18.9% - with individual European countries. Public opinion in Indonesia sees the EU as among the leading global actors in advancing innovation and technological progress, closely following the US and Japan. Ninety-six per cent of respondents see the US role in this sphere as very important or somewhat important, and 95% the role of Japan and the EU. Russia and China closely trail them with 91% each.

SRT theme presents the highest share of press articles which present the EU as a principal subject written in a positive tone (67%).

However, the EU is seen as an actor excelling mostly in manufacturing where the investment and products associated with individual Member States are still considered essential. One of the focus group participants mentioned BMW car and German high-speed train to describe the excellence of high-class European technology.

In information and communication technology fields, especially with the phenomenon of Industry 4.0, the EU is seen as trailing behind China and Japan. In view of one of the experts: "These two countries keep updating their capability and expand their market share in Southeast Asia including Indonesia".

The EU strive for clean technologies as a part of the Green Deal policy is expected to raise its profile as an international actor in the science, research, and technology sphere and strengthening of cooperation between the EU and Indonesia is expected in this sphere due to the EU global climate action.

Indonesian press does not explicitly publish materials on the EU Green Deal, but several articles mentioned the policy connected with science, research, and technology theme.

Development and assistance

The public in Indonesia sees the UN (95.4%), ASEAN (94.1%), the EU and Japan (93.9% both) as the most important international development actors. However, a smaller share of respondents (65%) see

the EU role as a development actor as very important compared to 77% and 76% and 74% for the UN, WB and ASEAN, respectively. Russia and China are seen as important development actors by 88% and 86% of respondents, respectively.

Opinions on the impact of individual development actors in Indonesia are formed based on the present engagement and the history of development cooperation. Experts praise Japan for the format of its development and social projects in Indonesia, which are implemented “at the community level”.

Development assistance from the EU in Indonesia is a type of activity implemented by international organisations such as the UN Agencies and World Bank. In Indonesia, support from international organisations is also seen as strengthening the country’s international contacts. Engagement with international organisations would also raise Indonesia’s posture in the global context. The EU, therefore, can be perceived as an actor comparable to the UN and World Bank, recognised for their development assistance.

Indonesian press reports on EU Social DigiThon 2021 - a competition held by the EU Delegation in Indonesia in cooperation with ASIOTI - Indonesian Internet of Things Association. The DigiThon invited young people to offer creative solutions for social problems associated with COVID – 19 pandemics.

The experts acknowledge the EU involvement in Indonesia development process, such as disaster risk reduction, Indonesian press reports positively on EU support for flood and typhoon victims in Indonesia, governance reforms, and support to Indonesia’s participation in regional and multilateral arrangement (ASEAN and WTO). In view of the experts, the EU’s involvement is strengthening its position as a reliable partner for Indonesia and is boosting its image as an important global actor promoting its norms and achievements. One of the experts mentions the EU contribution to the Aceh Monitoring mission as having a positive impact in Indonesia.

Social

Forty-five per cent of respondents in Indonesia associate the sphere of social development in the eyes of the Indonesian public is associated with the EU (see .Figure 51) and 27.1% with Europe. The press reports on social development in the EU positively, although this thematic frame is among the least visible in EU reportage (only seven articles presenting the EU as a principal subject during the period of observation discuss the theme).

The public in Indonesia has a positive overall opinion of the EU performance across all the social development indicators. Integration of migrants and refugees is seen as the area of the weakest EU performance (72.9% of respondents evaluate it as “very good” or “fairly good”). The highest share of positive views relates to the level of education (93.8%), overall quality of life (89.8%), employment opportunities (87.9%) and climate change activism (84.6%).

The focus group participants speak positively of education level and declare interest in the education possibilities in the EU.

Culture

The sphere of culture and sport is associated with the EU by 39.6% of Indonesian respondents, with Europe by 34.1% and individual European countries by 17.6%.

Indonesian respondents share a high opinion of EU culture. However, respondents name the Japanese culture and lifestyle as the most attractive for Indonesians. Ninety-three per cent of respondents see it as very or somewhat attractive²⁴.

Japan is trailed by the EU (86%), Russia and the US (80% each). The high appreciation for the EU culture and lifestyle can be traced to the historical influences. Despite certain negative connotations history of European colonialism in Indonesia has a lasting impact in various aspects of culture and daily life through the influence on language, legal system, utilitarian culture, cuisine, arts, and performance culture.

When referring to the EU culture, the public in Indonesia mostly comments on the European culture at large and the western lifestyle. All aspects of European lifestyle are evaluated predominantly as very or somewhat attractive and receive between 94% and 82% of positive evaluations. The areas of European culture perceived most positively are modern architecture and design, sports, monuments, museums, and arts (all over 90%). None of the aspects of European culture and lifestyle is evaluated negatively by more than 1% of respondents. The experts emphasize that past historical experience with European colonialism did not bring any negative perception on Indonesians. Indonesians can place such experiences and historical legacy as one of the foundations for the country's development.

The focus group participants perceive the EU and European culture more through its material manifestations -consumer products, fashion, food, sports, and cinema – and associate it with individual European states or Europe in general. Goods like Italian pizza, French perfumes and wines, BMW automobiles, IKEA furniture or KLM airline are more popular because they originate from the EU Member States.

While experts repeatedly mention Europe on Screen Film Festival - the key EU supported cultural event in Indonesia - university students interviewed for this study are less familiar with the event. The ones who attended the festival see it as representing the EU Member States rather than the EU.

EU culture and lifestyle in Indonesian press compete for the media coverage with other culture and lifestyle themes. There are several alternative media (hard copy of Newsletter, bulletin, mini magazine) owned by specific communities or clubs, which cover EU culture as a part of international culture news, but there are no special media or materials that cover the EU or European culture. As online media platforms are getting more popular, EU and European culture promotion in social media platforms or dedicated websites can raise EU culture attractiveness among the youth.

One of the experts suggests incorporating the European cultural heritage sites in Indonesia into public diplomacy activities.

Health

In response to the COVID-19 pandemic and its effect on Indonesian society, the press offers massive coverage of public health management. It covers primarily actions by the Indonesian government aiming at battling the pandemic effects in Indonesia, the availability of vaccines and anti-vaccination sentiments. Several articles mention the EU and its vaccine policy and the vaccine provisions to the third countries, including Indonesia. Other articles mentioned cooperation between Indonesia, the EU and WHO on managing COVID -19. The EU focused press coverage in health themes is balanced overall, presenting an equal share of positive and mixed tone articles. The health theme was not prominent in interviews with experts and during focus groups.

²⁴ Notably Japan is leading in the eye of Indonesian public opinion as the most desirable and most likely global leader and is seen as outpacing the EU as a norm setter.

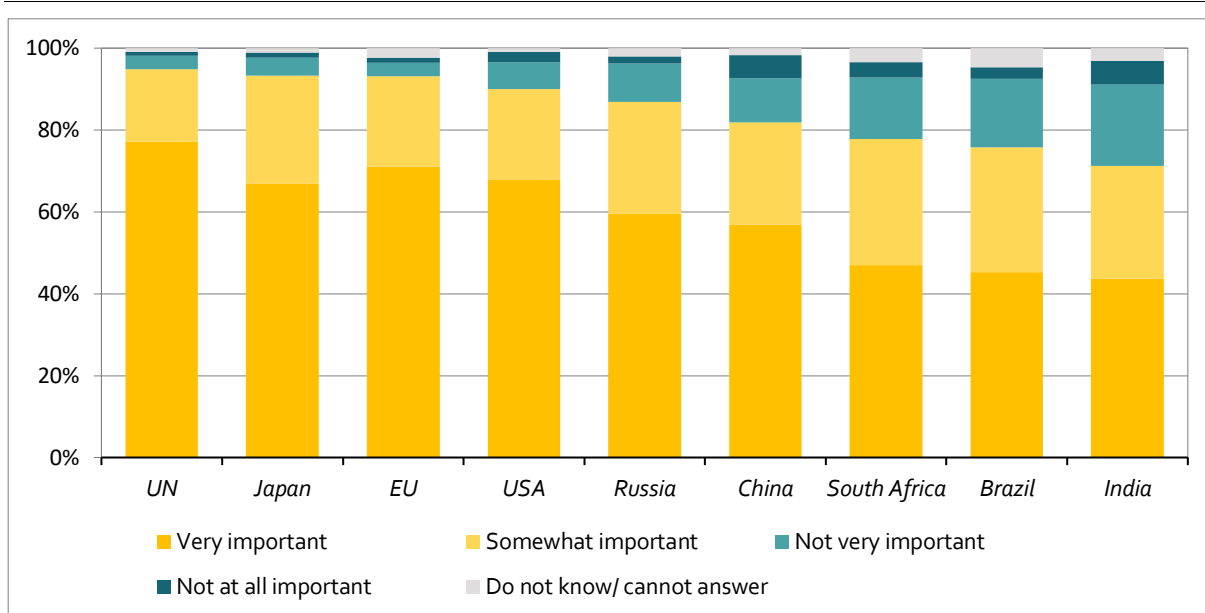
Continuity and change behind actorness

Indonesia was not included in the 2015 study. Analysis conducted in 2021 reveals that the EU is perceived in Indonesia as one of the key global actors often equal in importance to the US and UN. However, the EU perception in Indonesia is still rather generic and is formed through the knowledge of individual EU Members States. The image of the EU is to a large extent formed by activities of the individual countries’ representations in Indonesia and is dominated mostly by several associations such as high-quality manufacturing or art, history, and cultural presentation. Several experts believe that the EU is not specifically interested in developing relations with Indonesia due to geographical distance and insufficient knowledge of the country.

EU action in combatting climate change and support for development in Indonesia is acknowledged by experts and media and can be used to further public diplomacy activities in the country.

1.6.4. The EU as a norm-setter

FIGURE 54. PERCEPTION OF THE IMPORTANCE OF EU, OTHER ORGANISATIONS AND COUNTRIES IN GLOBAL HUMAN RIGHTS PROMOTION. INDONESIA



Note: based on Q11: In your view, how important, if at all, 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? (n=1133)

The public in Indonesia sees the UN (84.9%), Japan (93.4%) the EU (93.2%) as the most important international actors in human rights promotion. In public view, the role of Russia (86.9%) and China (81.9%) is also considered significant. The public in Indonesia seems to accept the different interpretations of the human rights agenda offered by different international actors.

At the same time, only slightly over 60% of respondents in Indonesia think that the EU shares the same democratic principle as their country (26% are unsure) and slightly over 73% believe that the EU is a good example for Indonesia in promoting equality between women and men (over 17% are unsure).

Between 86% and 70% of Indonesians believe that their understanding of specific values is similar or close to that of the EU with respect for human dignity, receiving the rights evaluation of 86%, and solidarity and respect for human rights, getting 81% in both cases. However, a significant share of

respondents in Indonesia (over 25% in case of respect for minorities value) still believe that their personal values are not very similar or not like the EU values.

Media coverage of the EU in Indonesia often presents certain issues in EU-Indonesia relations like trade or environmental problems as reflecting on human rights, democracy, and social solidarity. Media reports on the problematic treatment of minority groups migrants and refugees' accommodation in the EU undermine values projection. The importance of religion for Indonesians is another factor that forms the perception of differences in values between the EU and Indonesia.

The rule of law and social solidarity are the most visible normative frames in the articles driven by global factors (vaccine availability, climate change, bilateral relations with Russia or the UK). The EU is framed more positively in democratisation and human rights, but the framing of the EU sanctions against Myanmar, Russia and China is neutral. Further, when Indonesia-specific issues are concerned (palm oil), the news outlets stress differences in political stances of the EU and Indonesia, e. g. EU environmental standards vis-à-vis Indonesia's developmental needs for the elimination of poverty. Notably, media outlets leave space for amicable, dialogue-based resolution of this issue. Finally, in a minor way, Investor Daily touches upon legal issues and global economic institutions in the context of business rules and regulations.

Experts and youth share the similar opinion that the EU values are sometimes too aggressively promoted during the EU interaction with Indonesia. As expressed by a focus group participant: "The EU really sticks with their human rights principles, and they want other countries to follow such principles, while other countries might have their own understanding of human rights principles."

Compared to the EU, other actors may have a more positive perception of their norm-setting activities. One expert mentioned the US and Japan as the so-called good mentors drawing forward Indonesia's modernisation.

1.6.5. Continuity and change

Indonesia has not been included in the 2015 study. The following reflections are based on a literature review and interviews.

The literature on EU-Indonesia relations identifies economic cooperation, trade, development, good governance, environment action (including fighting climate change, palm oil industry management and combatting deforestation) and civil society capacity building as critical items on EU-Indonesia partnership agenda (Fitriani, 2020, Robertua, 2019, Camroux and Srikandini, 2020). The experts in Indonesia mostly agree that EU-ASEAN cooperation contributed significantly to EU-Indonesia bilateral relations development. It has been further strengthened under the PCA and can develop more under the upcoming CEPA.

Indonesian public and youth, in particular, do not have a clear understating of the EU as an entity which can cause scepticism towards the EU.

Indonesian experts express doubts of the EU interest to develop closer relations with Indonesia and its capability to do so (due to the EU internal crises and relative loss of international position as a result of China's economic growth and strong position of the US as a geopolitical actor). Nevertheless, they are inclined to see the country's up to date relations with the EU as a factor strengthening Indonesia's international position and advancing its economic development.

Literature suggests flexibility and assertiveness on the part of two partners (Fitriani, 2015, p.155) and a more inclusive trade strategy (Schmitz, 2015, Sicurelli, 2020; Camroux & Srikandini, 2020) as the tools to overcome negativity in perceptions.

Indonesian educated youth express concerns about the rapid global changes and declare strong hope that EU-Indonesia relations will benefit young people by bringing more opportunities to explore the EU and Europe and have more interactions with the EU and European people.

The bilateral relations will be facilitated by expanding the bilateral interactions, expanding cooperation networks to include new actors, and using the full potential of communication platforms (including social media).

1.6.6. Recommendations for EU public diplomacy

The key audiences for EU public diplomacy in Indonesia are decision-makers (government, political parties, parliamentarians); leading public policy think tanks and research institutes; local journalists and media, opinion-makers/leaders, academia, particularly youth; civil society and non-governmental organisations and communities which engage in EU initiatives. Each of them has various perceptions of the EU. Designing public diplomacy action focused on the expectations of all of them will require investigating the key expectations towards the EU on the part of these key groups and referring to the perceptions of the EU shared by these groups.

In Indonesia, public opinion, elites, and the media view the EU as an international actor supporting regional and international cooperation in Southeast Asia and South Pacific and engaging with the developing countries as their important working partner. This view is reinforced by the EU's engagement in strengthening cooperation within ASEAN and its action on fighting global climate change. Relatively high visibility of the EU engagement in promoting regional cooperation is coupled with the uncertainty of the EU profile. The EU is considered to play an important role in a multipolar world, although it is perceived much less as a coherent foreign policy actor. The nature of the EU as a supra-national entity is making it difficult for the public, youth and some segments of the decision-making groups to evaluate the EU action towards Indonesia.

EU is perceived as an actor that brings a positive contribution to the development process in Indonesia. Experts estimate positively the EU-funded capacity-building programs, such as Erasmus Scholarships/Fellowships, Horizon 2020, DRR/DRM (Disaster Risk Reduction/Disaster Risk Management under ECHO, are seen positively by experts in Indonesia.

The EU, however, is not the most visible development actor in the country. It is overshadowed by several countries – the US, Japan, China – and organisations - ASEAN, UN, World Bank. The not so clear nature of the EU as a supra-national entity coupled together with the active presence in Indonesia of some of the EU Member States and regional leaders of Asia Pacific region (Japan and China) feeds into scepticism towards the EU as a partner. Several EU Member States - Netherlands, Germany, France, Spain, Poland, and Hungary have long-lasting interaction with Indonesia and therefore are more visible for public opinion compared to the EU itself.

The interaction between the EU and Indonesia is still developing, however. Since 2015, economic cooperation has become the central theme in the EU perceptions in Indonesia, followed by trade and development. However, Indonesian decision-makers view China and Japan as alternative and more essential export destinations in comparison to the EU. Differences in EU-Indonesia interests, trade barriers, and miscommunication (notably, disputes over EU regulations towards palm oil exports) are named the primary causes. For Indonesian decision-makers, who see economic growth as the primary goal of their policies, these disputes feed into the critical perception of the EU. Some Indonesian decision-makers share an opinion that the development of bilateral relations with Indonesia is not on

the list of the EU priorities and the EU engagement with the country only focuses on selected issues important for the EU.

The youth focus groups participants would like the EU to engage more actively with Indonesia and assist the Indonesian government with social issues, such as minority rights, supporting secularism, improvement of the local education system, and transferring skills on green technology. Students expect that the EU will be more active in knowledge sharing with Indonesia in green technology, higher education, and culture. EU to be more active and more elaborate in promoting cooperation with Indonesia in education and culture through scholarships and cultural festivals. The participants believe that this would allow building awareness, a better image of the EU, and create a more positive perception among Indonesians. Most students express a wish to be more exposed to the EU and EU activities in Indonesia by receiving information and/or participating in the related events.

Therefore, the EU public diplomacy action in Indonesia should address the publicly shared misconceptions of the EU, which can feed the scepticism towards it. The EU communication should concentrate on promoting the knowledge and understanding of the EU as an entity, its plans for the engagement in the Asia Pacific region. It should also explore the points of common interest for the EU and Indonesia (fighting climate change and supporting sustainable development in the region) and promote the EU contribution towards development in Indonesia.

The public diplomacy activities should be developed in reference to the development support activities in Indonesia. This action should raise the number of individuals and organisations from different spheres of society directly involved in bilateral relation activities as one of its priorities²⁵.

Based on interviews with Indonesian experts, decision-makers and students as well as data collected for this study, the suggested themes to organise EU public diplomacy activities in Indonesia relations are economy (trade and investment), environmental issues, education, digital technology (including scholarship schemes and technology transfer), social development (including public health governance, human rights, gender equality) and culture.

Theme: Education

The present EU and individual EU Member States funded scholarship and fellowships schemes (Erasmus + and Horizon 2020, DAAD Scholarships, Eiffel Scholarships, Stipendium Hungaricum, Ignacy Lukasiewicz Scholarship, Swedish Institute Scholarships for Global Professionals) have been very successful in providing Indonesian students and members of academia opportunities to upgrade their academic and professional skills. They have enormously contributed to the EU – Indonesia partnership. Bilateral relations could gain momentum if education and research funding schemes are expanded to cover STEM subjects and vocational training programs supported by internships and working opportunities in EU countries.

Events as European Higher Education Fair should get more active promotion due to competition with similar events organised by countries more familiar for Indonesians. Information dissemination through media outlets and more active collaboration with the local educational institutions and local alumni association of such programs can raise their visibility.

The proposed activity in education is increasing the number of scholarship and fellowship opportunities for study, establishing joint research projects, and establishing multi-discipline education

²⁵ Some experts suggested cooperation with local Muslim associations Nahdlatul Ulama and Muhammadiyah to spread information about the EU and its activities.

programs, which will include local content and will be facilitated by the latest communication technology (4G or 5G).

Theme: Technology (with focus on digital technology)

The two-track EU contribution in digital technology will be welcomed in Indonesia: support for the infrastructural development and support in education.

The current partnership between the EU and Indonesian government on digital technology is expected to contribute to Indonesia's 5G network deployment, helping to expand it to the remote islands.

Educational activities in the sphere of digital technology could concentrate on programmes raising the digital competencies of Indonesian youth and campaigns on the safe use of digital technology and data and personal information protection.

Theme: Health

The COVID-19 pandemic raised understanding of the health governance importance. The management of public health issues, including infectious diseases prevention, is seen as a significant problem in Indonesia which faces a deficit of public health facilities.

COVID – 19 pandemics also encouraged the Indonesian governments to collaborate with non-government actors, such as media, private sectors, academics, professionals, and local communities, for vaccine distribution, further research on post-COVID – 19 conditions. Due to this new openness to cooperation with non-government actors, all possible forms of capacity building and best practice sharing initiatives supported by the EU will have a chance to promote the role of the EU as a development actor in Indonesia and contribute to the national public health system development.

Theme: Environment and climate change (with focus on agriculture)

Given the priority for climate change prevention activities in the EU global action and the variety of the EU funded or EU supported programmes aiming at combatting the negative environmental impact of the economic activities currently implemented in Indonesia, the continuation of the public diplomacy action focusing on the theme of environment protection is a “natural suggestion”. Activities promoting the achievement of the programmes such as EU FLEGT VPA initiative, UN-REDD + and REDD II programmes, Switch Asia I-II, Sustainable Cocoa Development Project (SCDP), Business Spice and continuation of the EU support for their implementation in Indonesia will contribute to resolving the disputes over EU barriers for the key Indonesian agricultural exports to the EU.

Theme: Social and cultural issues (focus on human rights and gender equality)

Over 90% of Indonesian respondents acknowledge the importance of the EU as a key actor in human rights promotion, and over 60% of Indonesians accept the EU democratic standards and standards of equality between women and men. Youth participating in the focus groups conducted in the framework of this study declared their expectations towards the EU to be more engaged in the social development support in Indonesia. Public activities in this sphere will also help mitigate the damage to the EU image caused by negative press coverage of minority groups, migrants and refugees' treatment in the EU.

Potential partners for public diplomacy actions

Government actors and members of parliaments in the national and provincial levels, interest groups; business communities from 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 organization and members of the academia.

General recommendations

Accounting for the local cultural setting:

- Developing a comprehensive public diplomacy strategy for Indonesia, which will include multi-track diplomacy and cultural diplomacy elements;
- Active use of social media channels for information dissemination and sentiment monitoring;
- Establishing partnerships with local actors representing government, media, expert, and business communities with the specific focus on information dissemination;
- Engaging experts representing younger generations to serve as a bridge between the EU and the Indonesian locals.

Promoting synergy:

- Activity coordination with the EU MSs diplomatic missions in Indonesia and other related institutions (cultural centres, business associations' representations etc.);
- Cooperating with the networks of the EU citizens residing in Indonesia as potential partners in public diplomacy activities.

Reaching out to local actors:

- Strengthening collaboration with local interest groups and local communities;
- Targeted cooperation with Indonesia media outlets to increase knowledge of the EU in Indonesia;
- Using EU–ASEAN inter-regional cooperation mechanisms for EU – Indonesia bilateral initiatives promotion;
- Optimizing the work of the “Team Europe” mechanism and considering employing it for the action outside of COVID-19 response;
- Providing support for the Indonesian organizations' participation in international cultural events held in Europe.

1.7. Japan

This Country Chapter presents a synthesis of the Japan-specific findings of traditional and social media analysis; interviews, focus groups and public opinion poll that were all conducted in the framework of this study. The Chapter follows the logic of the research design of the study at hand. We present the main findings for Japan according to the research criteria applied – namely visibility; actorness and local resonance; and norm-setting. Moreover, in the section on actorness and local resonance, we discuss these according to the themes analysed in this study: economy and trade; political issues; development; social issues; environment; energy; science, research and technology; culture; education; health (new perspective). The final section before policy recommendations looks at the local conditions that explain the perception of the EU in Japan. We conclude the chapter with recommendations for the EU's public diplomacy in 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.

1.7.1. Sample

Public opinion

The online survey was coordinated and conducted by PPMI through an online panel provided by Syno International. The respondents in Japan were surveyed in Japanese. Data collection took place from 28 April to 16 May 2021. The sampling for the survey was designed to be nationally representative by gender and region²⁶. Respondent profiles in Japan were established based on Statistics of Japan (e-Stat portal)²⁷. The survey included a total of 1126 individuals aged 15 to 64 year old²⁸.

Media

The quantitative part evaluating the general trends in a large press media sample was carried out by PPMI. Five popular prestigious dailies *Asahi Shimbun*; *Yomiuri Shimbun*; *Tokyo Shimbun*; *Mainichi Shimbun*; *Sankei Shimbun* were monitored from 1 February to 30 April 2021. The *Factiva* repository was used to aggregate content from both licensed and free sources, and in-house data processing was applied to produce the results.

Two separate datasets in Japanese language were collected over the period of observation – «EU» (1131 articles) and «Europe» (1679 articles). Search terms for the dataset “EU” are: “European Union”, “EU”, “European Commission”, “European Parliament”, “Court of Justice of the European Union”, “EU presidency”, “EU Council”, “European Council”, “Council of the European Union”, “Eurozone”, “European Central Bank”, “European Investment Bank”, “European Medicines Agency”. The search terms for the dataset “Europe” are “Europe”, “European” and “Europeans”. The search terms for “EU” and “Europe” datasets consider both plural and singular forms as well as possible grammatical forms of the search terms in the local language. Europe dataset excludes articles containing any of the “EU” dataset keywords.

The qualitative media content analysis was designed, supervised, and coordinated by experts from Public Diplomacy and Political Communication Forum (PD-PCF), University of Canterbury (UC), New Zealand, and conducted by local researchers trained by the PD-PCF. PPMI collected the media sample (78 articles) using the search engine from three prestigious newspapers *Asahi Shimbun*, *Yomiuri Shimbun*

²⁶ The survey for this study was conducted online under the COVID-19 related restrictions. The sampling parameters were influenced by the available tools allowing to reach all the 13 countries covered by this study and. Due to a high share of residents aged over 65 in Japan (over 25%) the survey results for Japan are not representative by age. The study relies on social media analysis, media analysis, literature review and focus groups to properly cover the variety of views in Japan society.

²⁷ Statistics of Japan: <https://www.e-stat.go.jp/en>

²⁸ Detailed public opinion survey data are available in Annex II of this Report – Comparative public opinion survey report.

and *Nikkei* for country expert for in depth qualitative analysis. The exact timeframe of observation remained the same. Experts analysed the EU image created by applying elements of content, cognitive and critical discourse analyses.

Social media

PPMI carried out the social media analysis. The data collection process was automated using the online social media monitoring tool *Mediatoolkit*. Social media posts were collected from Twitter, Facebook and Instagram with the use of automated queries. Coverage of the EU was traced using a set of the EU-related keywords: “European Union”, “EU”, “European Commission”, “European Parliament”, “Court of Justice of the European Union”, “CJEU”, “EU presidency”, “EU Council”, “Council of the European Union”, “European Council”, “Eurozone”, “European Central Bank”, “European Investment Bank”, “European Medicines Agency”. All the keywords were additionally traced in one-word format to capture related hashtags: europeanunion, europeancomission, europeanparliament, courtofjusticeoftheeuropeanunion, eupresidency, eucouncil, europeancouncil, counciloftheeuropeanunion, europeancentralbank, europeaninvestmentbank, europeanmedicinesagency. Europe-specific keywords used for filtering relevant social media posts are “Europe” and “European”. Europe dataset excludes posts containing any of the “EU” dataset keywords. Additionally, a location filter was used to ensure that the collected mentions originate from Japan. A language filter was set up to collect posts in English and Japanese.

The resulting sample of Japanese social media posts collected from 1 February to 30 April 2021 includes 531933 mentions, of which 44779 are of the EU (74% in Japanese) and 642345 of Europe (97% in Japanese).

Working with social media platforms, the Project Team followed each platform’s terms of use. All identifiable information of individuals from social media data remains confidential and is removed before the publication of findings. Computational analyses of the samples involve only contents from media databases’ public websites – posts that are available to general audiences. No generalised conclusions that might cause any potential harm to identifiable communities are drawn from social media analysis.

Interviews and focus groups

Interviews with local opinion- and decision-makers as well as focus groups with students were conducted by the Country Experts, with training support and supervision from PD-PCF, UC, following the approval of the UC Human Ethics Committee. As part of this study, interviews and focus groups aim to provide in-depth explanations about Japanese perceptions of Europe and the EU and cross-reference the findings from the public opinion survey, traditional and social media analyses.

12 interviews were conducted by country experts – efforts were made to include a wide range of opinion leaders, policy-makers, government officials, journalists, academics and a think tanker and businesspersons, etc – 3 government officials, 3 journalists, 3 academics, 1 think tanker and 2 businesspersons; 9 male and 3 female; 1 in the 30s, 6 in the 40s, 4 in the 50s and 1 in the 60s – a mix of those who have heavily been involved in the EU and those who have not, but mainly (8 or 9 out of 12) from the former. All the interviews were conducted online in Japan in Japanese. A focus group interview was conducted with university students – 8 people in one group (5 male and 3 female all in the early 20s in their age and many studying international relations, though not necessarily European studies). In Japan’s case, all the participants were from the same university (one of the top universities in the country), with diverse personal and educational backgrounds.

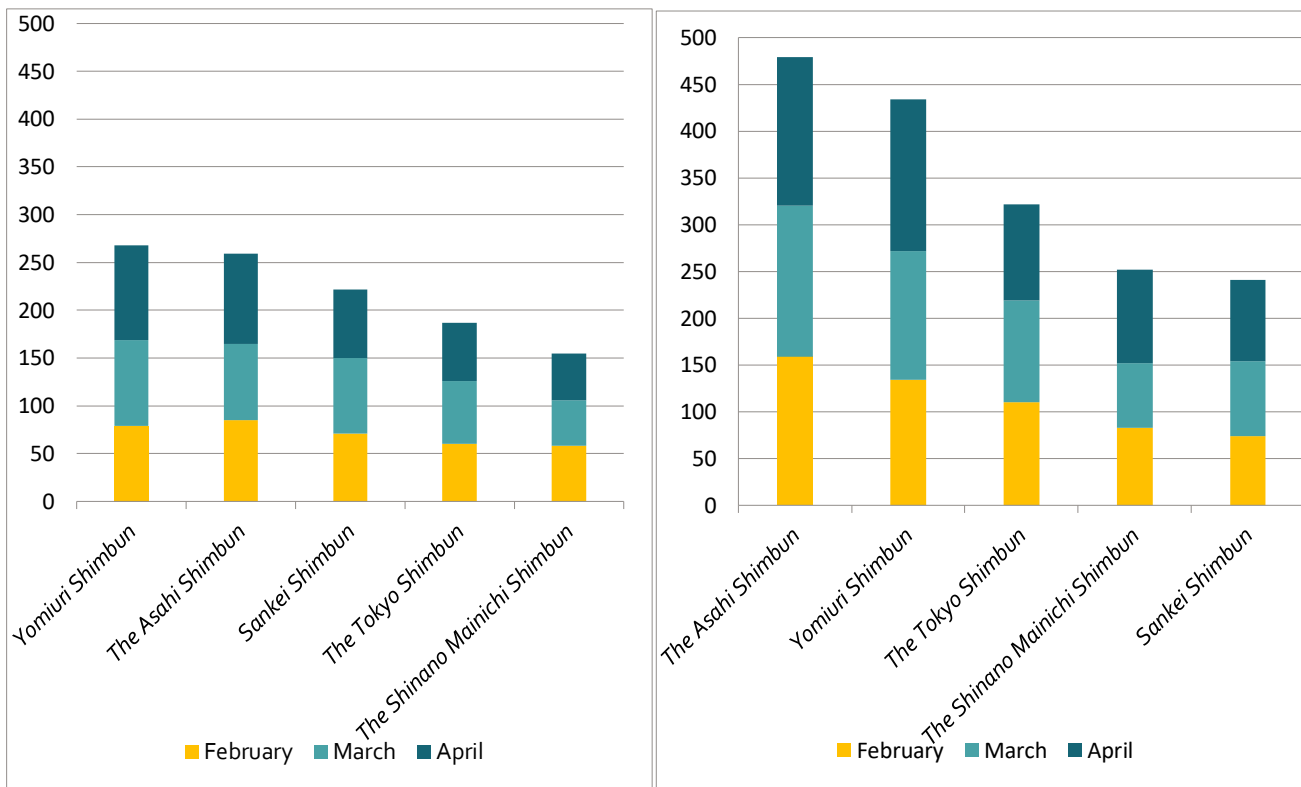
1.7.2. Visibility

The level of the EU consideration by the Japanese public is relatively high. Eight per cent of respondents chose “do not know/cannot answer” when asked to share their opinion about the EU in general. The number for China is 5.4%, for the US - 6.5%, and India 7.4%. The US is the only treaty ally on which Japan’s security and defence depend. China is the biggest of Japan’s neighbours and the biggest trading partner and, at the same time, a country that challenges Japan’s control of the Senkaku Islands in the East China Sea. The generally high level of awareness and visibility of the EU is reflected in many EU-related articles in Japan’s major newspapers, as mentioned above.

Nonetheless, the public does not seem to have a strong image of the EU (and other significant international actors apart from Japan itself). The highest share of respondents - 22% recognises the EU as multicultural (for the US, the share is 29%) and modern by 19%. In 2015 the EU was seen as modern by 20.2% of respondents and as multicultural by 29.1%. The US is seen as strong by 42% of respondents and modern by 32% (the most often selected descriptors). Meanwhile, China is seen as “aggressive” by 48.6% of respondents (the EU by 1.8%) and “arrogant” by 43.5% (the EU by 3.7%). What is remarkable from the opinion poll results includes that the EU scores 15.4% for “peaceful” and 11.0% for “trustworthy”, which are the highest scores in these description categories except for Japan. The most often description of Japan itself is peaceful (53.7%). China and Russia are seen as more negative actors. Over 48% of respondents see China as aggressive (31% for Russia) and over 43% as arrogant (over 24% for Russia). Notably, 31.3% of respondents cannot choose any descriptors related to the EU (32.2% in 2015).

As for perceptions of EU activities, out of 14 areas, only “tourism” (57.3% compared to 52.7% in 2015), global trade (55.5% compared to 46.4% in 2015) and “development of new technologies” (51.3% compared to 35.8% in 2015) scores above 50% for combined “very good” and “fairly good” evaluations. The average combined “very good” and “fairly good” evaluation is 46%. The other areas score highest for “fairly good” or “neither good nor bad,” reflecting the generally positive yet not powerful perceptions of the EU among the Japanese. At the same time, such a mild or neutral response might also result from the Japanese tendency to choose something in the middle, not extreme. An average of 17% of respondents choose “do not know/cannot answer” for all the areas. Approximately one in ten respondents (10.6%) in the opinion survey say they hear about the EU almost every day, followed by those who hear about the EU once a week (21.1%).

FIGURE 55. VOLUME OF NEWS ITEMS WITH A REFERENCE TO THE EU AND EUROPE IN TRADITIONAL MEDIA. JAPAN



Note: based on automated quantitative data analysis. Includes press articles which report on the EU and Europe as a principal or secondary subject of the article.

Overall, media coverage of Europe is significantly higher at 60% throughout the whole period than the EU and its' institutions at 40%. Data shows that the "EU" dataset had slowly rising media visibility from February (31.1%) to March (33.4%) and April (35.5%). Coverage for "Europe" was similar – February (33.5%), March (32.2%), April (34.3%).

The degree of major centrality for EU articles was slightly lower for all traditional media outlets. The Tokyo Shimbun and The Mainichi Shimbun had the highest coverage of articles centred around the EU (48.1% and 42.6%, respectively). A slightly lower degree of centrality in qualitative analysis shows that the EU and its institutions were occasionally profiled as the main actors in the news story.

Europe visibility in social media is more than two times higher than that of the EU (16497 posts vs 35498). The peak on 7 April is generated by retweet activities related to a tweet about the European Medicines Agency recognition of the relationship between AstraZeneca vaccine and blood clots.

Member States and MSs' leaders' visibility, EU institutions and EU leaders' visibility

In both "EU" and "Europe" datasets among the EU institutions, the European Commission was mentioned the most –94 times in Japanese media. The media paid slightly less attention to European Medicines Agency (77), European Central Bank (56), European Parliament (54), European Council (15) and Court of Justice of the European Union (1). Other EU institutions were not mentioned in the media articles.

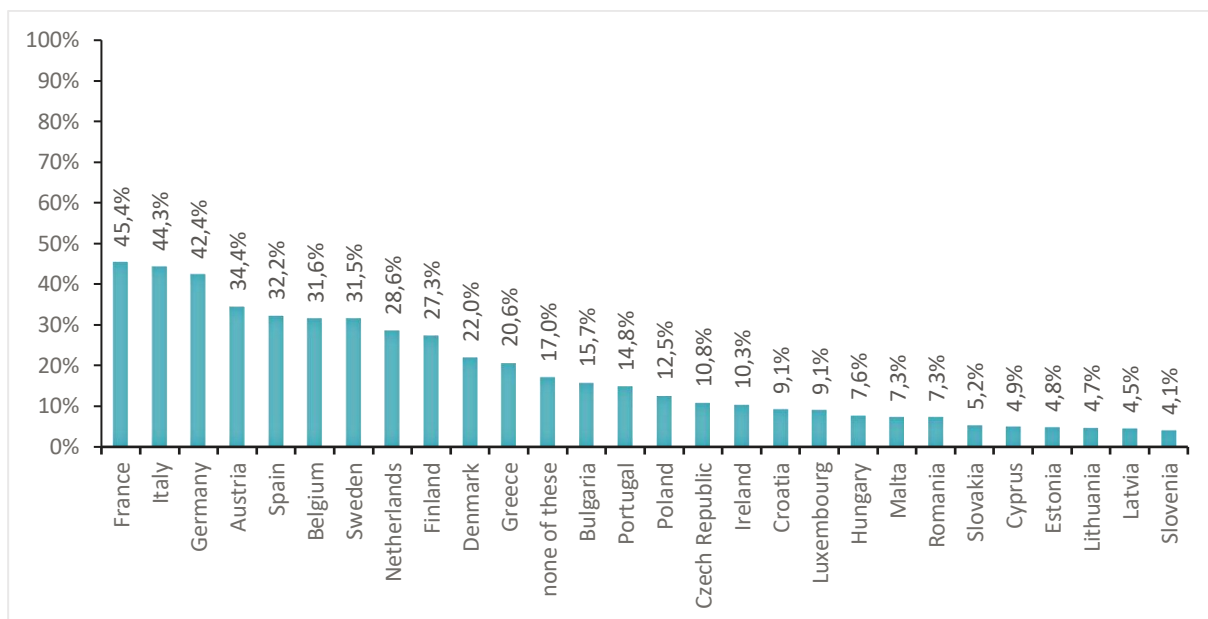
Several countries were mentioned more often in “EU” news compared to other countries – Belgium (64%), Sweden (59%), Greece (52%).

In quantitative analysis the most mentioned EU official is High Representative Josep Borrel (63), followed by the President of the European Council Charles Michel (33) and the President of the European Central Bank Christine Lagarde (8).

According to the qualitative analysis, the European Commission, including its President, was the most frequently mentioned EU actor largely for EU-specific factors in the sense that the European Commission plays a central role in several visible EU processes, such as green recovery, vaccine distribution and export control, etc. The second- and third-most mentioned EU bodies are the European Council and Foreign Affairs Council – the former mainly in the context of green recovery and the latter concerning the EU’s relations with Russia and China. As for Member States, Germany was the most frequently mentioned MS, predominantly in EU-related articles. For example, Germany was framed as the biggest and the most influential country in the EU and a country getting ready for the upcoming 2021 parliamentary elections. Articles also mentioned different EU MS actors, such as German, Hungarian, Italian and Polish leaders (in the context of elections in Italy or the rise of populism in other cases). Chancellor of Germany, Angela Merkel is the leader in term of mentions in the media (44) followed by prime minister of Italy Mario Draghi (39) and president of France Emmanuel Macron (33). Compared with the 2015 Study, no substantial difference can be observed other than the increasing visibility of the health topic (COVID-related) and the declining visibility of the European Central Bank (ECB) in terms of the number of articles mentioning the institution. The high visibility of the ECB in the 2015 Study reflected the lingering financial crisis then. Japanese press coverage on the EU in terms of the actorness remains constant by focusing on politics, crises events and economy.

Each Member State was mentioned within the corpus of Japanese *social media* posts. France (5007), Germany (4048) and Italy (3408) were the most mentioned Member States. Notably, the majority of mentions is found in Europe-related feed. This is also largely consistent with the order of attractiveness – France (45.4%), Italy (44.3%) and Germany (42.4%) are the top three. The countries that are judged as least attractive – Slovenia (4.1%), Latvia (4.5%), Lithuania (4.7%), Estonia (4.8%), Cyprus (4.9%) and Slovakia (5.2%) – are, in fact, not unattractive countries, but least known among the EU Member States, because it is simply impossible to respond “attractive” without knowing even the name of the country. At the same time, the fact that any specific country is mentioned does not mean that the country is popular, because countries are often mentioned negatively.

European Medicines Agency is the most visible EU institution with 4647 mentions in Japanese social media. The European Commission (981 mentions) and the European Central Bank (838) are in second place. Some share of posts mentioned the European Parliament (634), the European Investment Bank (157), the European Council (64), the European Court of Justice (35), and EEAS (28).

FIGURE 56. ATTRACTIVENESS OF THE INDIVIDUAL EU MEMBER STATES. JAPAN

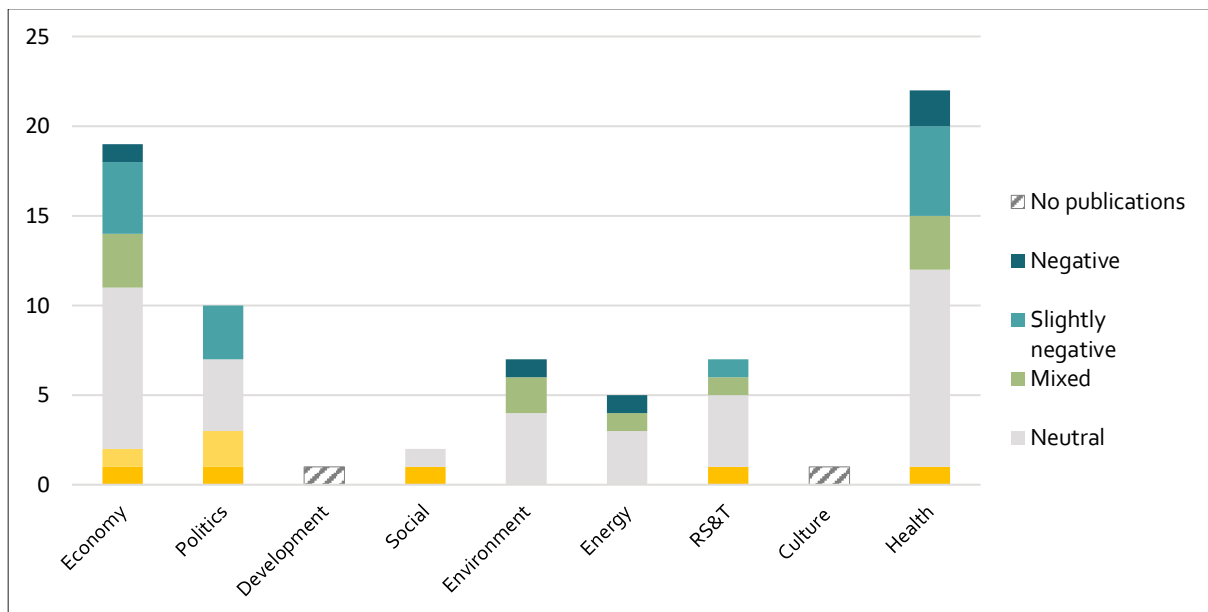
Note: based on Q25: Please indicate which European countries look the most attractive to you? Respondents could choose more than one country (n=1126). Respondents were not limited in the number of countries they could name.

In both interviews and focus groups, major MSs were heavily mentioned alongside with the United Kingdom. Individual interviewees seemed to be generally more familiar with various EU institutions/agencies including the EUD in Japan and therefore referred to those than focus group participants (university students). Yet, they mainly talked about MSs, particularly Germany, France and some other major MSs (as well as the UK). The focus group participants mentioned a similar set of major MSs like Germany and France and the countries in which they had lived or studied.

Emotive charge

Due to linguistics, not enough results were generated to evaluate emotive charge in Japanese media articles by the automated analysis method. In the set of articles, which reported on the EU as a central subject and were analysed by the County Expert, almost half – 48% of articles – portray the EU in a neutral tone. In social media, the emotive charge of the EU-related posts was overwhelmingly neutral (79.6%), with some positive (11.1%) and negative (9.3%) mentions. Ninety-five per cent of Europe-related posts were neutral.

FIGURE 57. EMOTIVE CHARGE IN PRESS ARTICLES REPORTING ON THE EU AS A PRINCIPAL SUBJECT. JAPAN



Note: Based on qualitative media analysis conducted by country experts. One article can reflect more than one theme.

Notably, emotive charges were used predominantly negatively, such as ‘tensions’, ‘complaints’, ‘fluctuations’, and there was no difference between all three outlets (Asahi, Nikkei and Yomiuri) in this regard. One of the rare exceptions to such a rule was about the vaccination in the EU, such emotive charges as “hope” and “confidence” are used. Given that the vaccination was not going well in Japan in early 2021 (February and March, in particular), the EU’s vaccination uptake was seen as successful. In comparison to the 2015 Study, no substantial differences in emotive charge have been observed. Japan’s media reporting remains predominantly neutral.

Continuity and change behind visibility and emotive charge

Visibility naturally depends on the events on the ground. As the 2015 study was conducted amid the Euro crisis, particularly involving the Greek debt crisis, Greece was the country that was mentioned in press articles the most and Tsipras, the Greek Prime Minister, was more than German Chancellor Angela Merkel. This has changed in 2021 as the Euro crisis has become less topical, if not completely solved. Also, when the 2015 study was conducted, the UK was still an MS and thus was included in the survey, which is no longer the case. Yet, people keep mentioning the UK when it comes to Europe. As for the visibility of EU institutions, while the ECB and the Council of the EU were the two institutions that were the most frequently mentioned in the media, it was the European Commission (followed by the ECB) in 2021. This can also be seen because the focus of Japan’s attention has shifted from the Euro crisis to other issues where the European Commission plays a bigger and more direct role, such as climate change and COVID vaccine supply and distribution (“hot” topics in 2021).

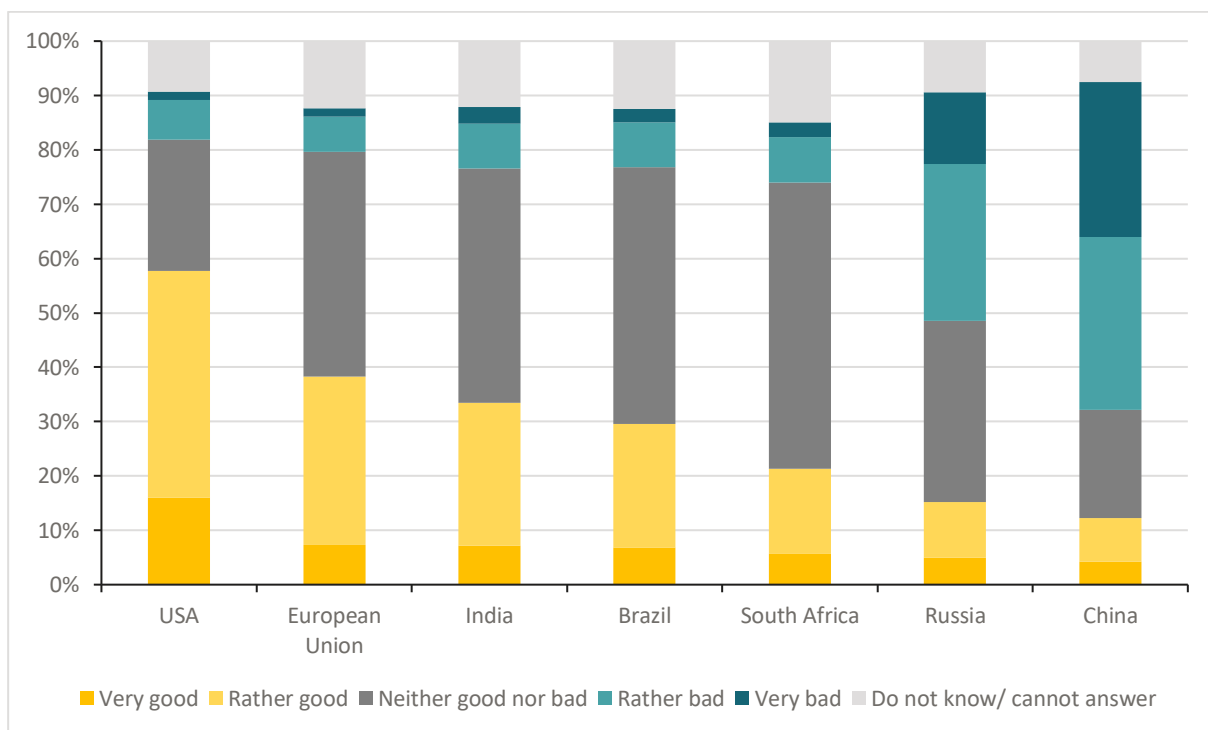
1.7.3. Actorness and local resonance

The EU as a partner

The fact that more than 40% in the opinion poll “do not know” about the state of the overall relationship between Japan and the EU shows that the awareness of the Japan-EU relationship remains low

compared to the relationships with major powers like the US and China (for both countries, the “do not know” answer is around 20%). Also noteworthy is the fact that the responses of “rather bad” and “very bad” regarding the general evaluation of the Japan-EU relationship are the lowest compared to other relationships, which suggests that while many people are not well-informed of the state of the relationship with the EU, many people still have a generally positive image of the EU – or at least many of them do not have any solid reason for possessing negative image toward the EU. The EU is generally seen as an important (“strongly agree” at 21,5% and “agree” at 39,2%) and trustworthy (“strongly agree” at 18,9% and “agree” at 35,4%) partner for Japan. What is more noteworthy may be the very low figures for “disagree” and “strongly disagree” for the same questions: 5,0% and 1,4% respectively for “important partner” and 5,2% and 1,9% for “trustworthy partner” (slightly higher than the former). Yet again, the fact that people do not have strong opinions on the EU cannot necessarily be seen as good news for the EU – the same situation as the 2015 study.

FIGURE 58. EVALUATION OF JAPAN RELATIONSHIP WITH THE EU AND OTHER COUNTRIES. JAPAN



Note: based on Q3: Which of the following words best describes your country’s overall relationship with each of the following countries and organisations? (n=1126)

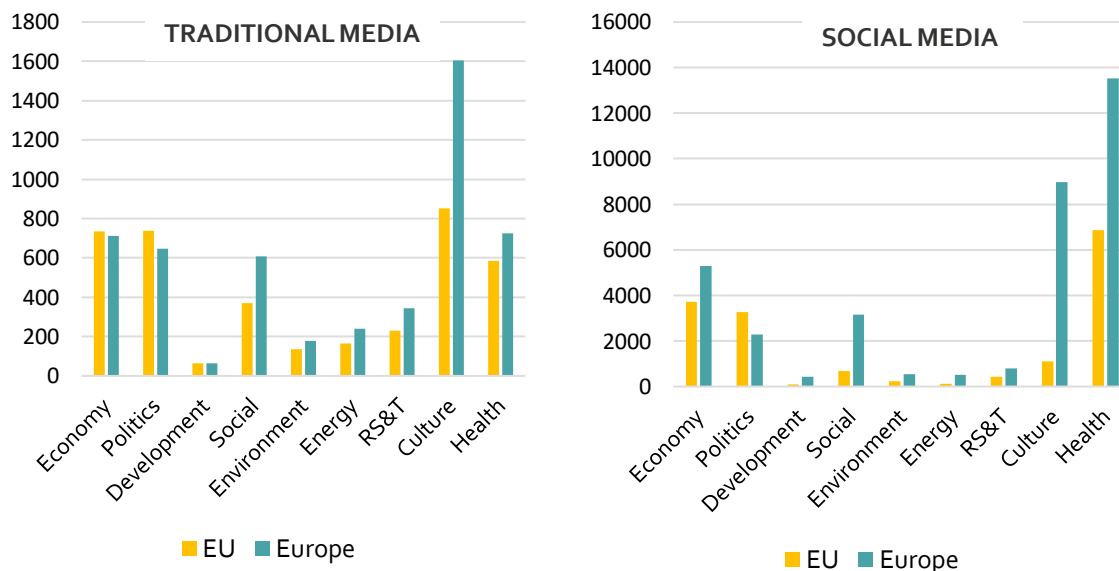
The interviews show that the EU is perceived as a powerful actor in international relations, particularly in trade, economic regulations, climate change and human rights. Many of the interviewees have positive views of the EU and expect the EU to play an important role in those areas, including as a leader in international norm- and rulemaking. Yet, it does not necessarily mean that they support the EU’s policies. In a way, they understand the need for international leadership and believes that it is in the interest of the international community that a global leader such as the EU exists. At the same time, they think Japan is not yet able to join such leadership, not least in climate change and human rights. A similar attitude can be observed in newspaper articles. They often highlight the EU’s new initiatives, for example, in climate change and AI regulations. On the one hand, they express reservations and highlight problems and challenges in pursuing such new initiatives. Yet, on the other hand, they also

convey the message that Japan also needs to act – in some cases, such articles are used to stimulate debates in Japan.

Most of the news articles in the media (major newspapers) are written by their own correspondents. All three outlets – Nikkei, Yomiuri, and Asahi (as well as other major newspapers and NHK, a public broadcaster)– have their own correspondents based in major European capitals (Brussels, London, Paris, etc.) with editing headquarters in London (NHK has the Europe Headquarters in Paris). Japanese newspapers also carry other parties’ articles, such as Reuters and AP, but they tend to be shorter articles. Japanese correspondents almost always write longer articles. While reports by correspondents in Europe tend to be of EU/European focus, the topics with a local hook like the COVID vaccine, climate change or AI regulations, and EU-China relations are more likely to get more attention from the editing HQs and more space (resulting in longer articles). One of the issues in this regard – which could be problematic following Brexit – has to do with the fact that major media organisations, including the three outlets surveyed here, have European headquarters in London that have editing functions (furthermore, Nikkei is a parent company of the Financial Times). The features above remain constant with no substantial change since the 2015 Study aside from the rise of Japanese local hook regarding the COVID, not least its vaccines, and AI and other emerging technologies.

While the survey result shows that television channels are mentioned as the most significant source of information on the EU (59,7%), followed by online media (34,1%), the situation differs widely across different age groups. It is understood that younger generations watch TV much less frequently than older generations. Also, it is often the case that people read newspaper articles (traditional media) online – thus difficult to distinguish between online media and print media.

FIGURE 59. THEMATICAL FOCUS OF SOCIAL MEDIA AND PRESS ARTICLES REPORTING ON EU AND EUROPE. JAPAN



Note: based on automated quantitative data analysis. Includes press articles which report on the EU and Europe as a principal or a secondary subject of the article. One article can reflect more than one theme.

In observed Japanese media, the “EU” is most often mentioned in the posts discussing culture (22%), economy (2019%) and politics (2019%) and health (15%). For “Europe”, culture (301%), economy (14%), politics (13%), health (14%) were the most covered themes. A considerable number of articles contained

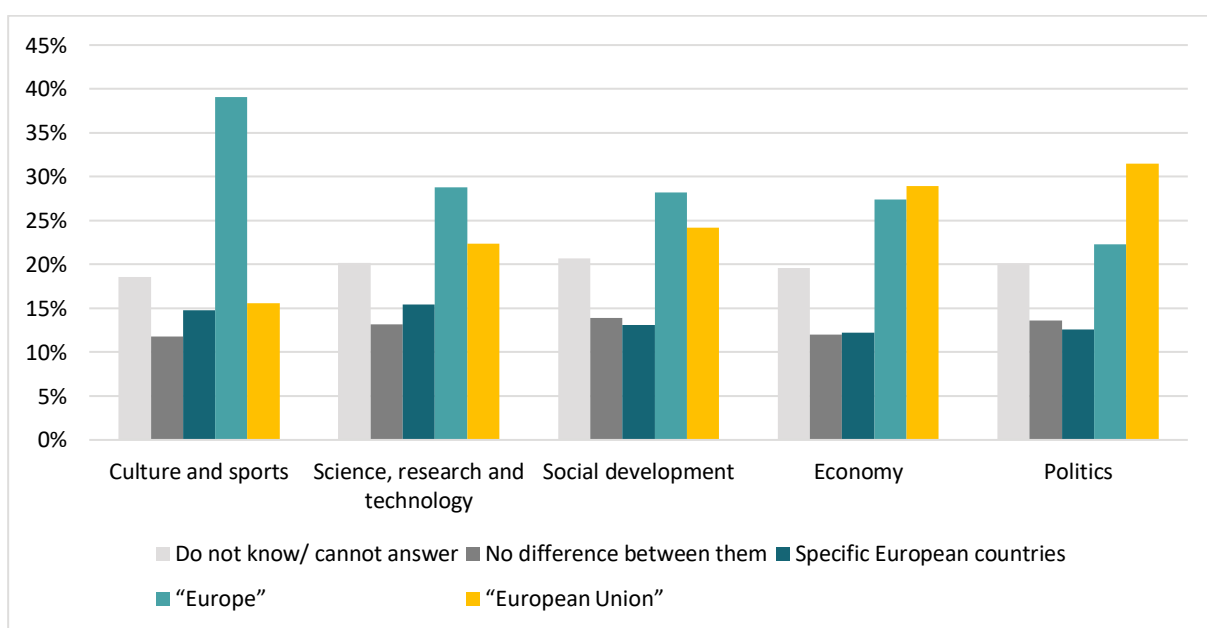
a social thematic frame (10% for «EU», 12% for «Europe»). For both «Europe» and «EU» development was the least noticeable thematic frame with 1-2% coverage.

In Japanese social media posts, the EU is the most often mentioned discussing health (41,6%). A considerable share of posts contained economic (22,6%) and political (19,8%) thematic frames. Health theme was also most prevalent in the “Europe” dataset (38%). Culture is the second most visible theme in the “Europe” dataset (25,2%). The view that when it comes to culture, Europe (individual countries, to be more precise) is more visible than the EU was strongly suggested by focus group participants and the interviewees as well. The results certainly reflect the unique nature of the period under survey dominated by the COVID-19 pandemic. The fact that the EU is where all three COVID-19 vaccines by the West are produced and that the EU introduced an export control mechanism for the vaccines, which could affect Japan’s vaccine import from the EU, caused much attention and concern in Japan. The high level of attention to “health” as a thematic frame should therefore be seen as an aberration, unique in 2021. The focus group participants and the interviewees also expressed a high level of interest in the COVID-related issues, including vaccination and vaccine export control.

Economy and trade

Given that the economy has always been at the heart of European integration, and it is where the EU has the widest competencies, it is just natural that the economy is featured in the media report. Yet, it is equally natural that the EU’s influence in the economy is seen as lower than that of the United States and China, the two dominant powers in the Indo-Pacific region where Japan is situated. Compared with the 2015 study, the perceived importance of the US has declined while that of China has increased, reflecting the evolution of the actual relative economic weight of the two countries.

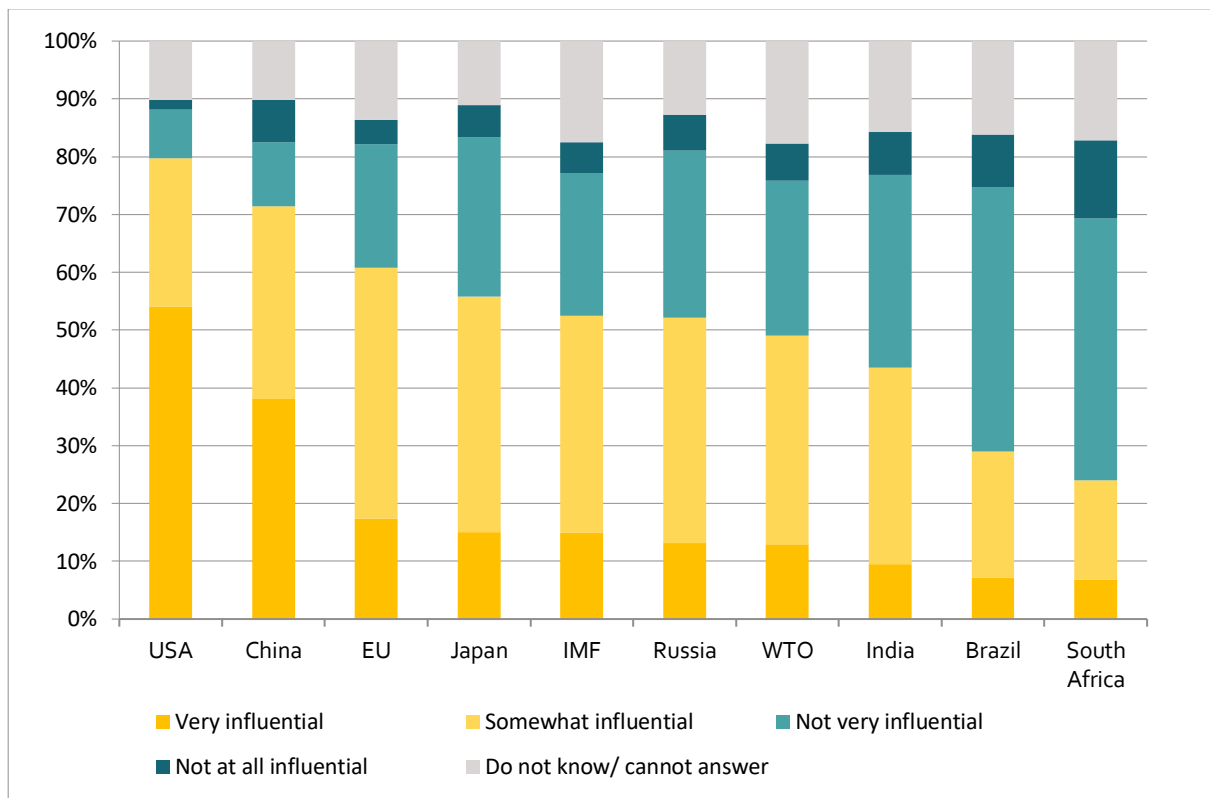
FIGURE 60. ASSOCIATION OF DIFFERENT AREAS TO THE EU VERSUS EUROPE. JAPAN



Note: based on the answers to Q22: Some people think about Europe, whereas others think about the European Union when talking about economy, politics, culture, sports and other areas. In your case, which term – Europe or the European Union - comes to your mind first when you think about the following subjects? (n=1126)

**Please note that in 2015, this question was accompanied by a chart in a different format under the section “Research, science and technology”. The wording and answer categories used in this question have changed in 2021, making it inappropriate to conduct historical comparisons.*

FIGURE 61. EU INFLUENCE IN GLOBAL ECONOMIC AFFAIRS COMPARED WITH COUNTRIES AND INTERNATIONAL ORGANISATIONS. JAPAN



Note: based on the answers to the survey Q6: In your view, how influential, if at all, in global economic affairs are the following countries and organisations? (n=1126)

It is no surprise that, on average, 45 to 50% of respondents in the opinion survey “strongly agree” or “agree” to such statement that the EU is a significant foreign investor in Japan, the EU should have more robust economic ties with Japan, etc. More than 60% “strongly agree” or “agree” to the statement that the EU is an important trade partner for Japan. What is more revealing is the fact that negative views (“disagree” or “strongly disagree”) are kept remarkably low, on average 8-10%, demonstrating again the generally positive nature of Japanese views of the EU in economic terms. These opinion poll results generally correspond to the opinions expressed by interviewees and the participants of the focus groups. First and foremost, the EU’s substantial internal market is something that many Japanese recognise.

Politics

In the eyes of the Japanese public, the domain of politics is associated with the EU (by 31.5% of respondents), then with Europe (by 22.3% of respondents). The EU is seen as “very” or “somewhat” important in maintaining global peace and stability by 68.3% of Japanese respondents (compared to 65.5% in 2015) representing the second-highest figures only next to the US (77.6%). This is yet another piece of evidence showing Japan’s generally positive perceptions of the EU. The figure for “don’t know” stands at 12.8% (an improvement from 19.9% in 2015), which is slightly higher than the figures for the US (10,0%) and China (11,6%), but lower than India (15.1%). Nevertheless, when it comes to specific areas like foreign policy, justice, and the rule of law, fight against terrorism, military operations, and peacekeeping operations,

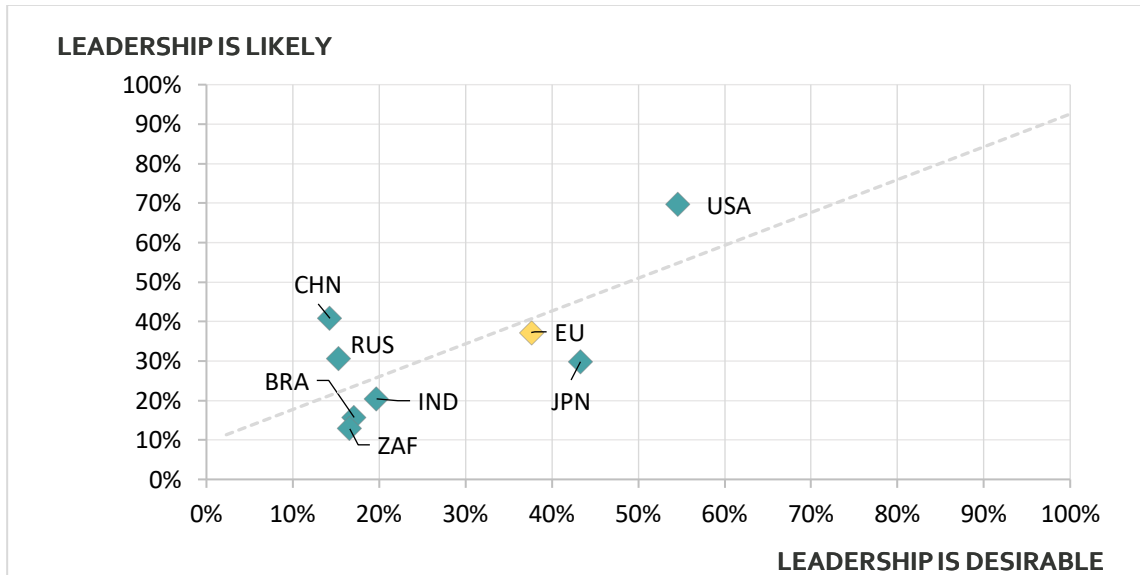
many people do not seem to have a clear idea what the EU is doing in those areas and cannot judge the performance of the EU. Combined, “very good” and “fairly good” answers for all the specific activities range between 36.2% for the fight against terrorism and radicalisation (34.6% in 2015) and 49% for support for regional and international cooperation (an improvement from 40.1% in 2015). The average share of positive evaluation stands at 42% (compared to 37% in 2015). Notably, “neither good nor bad” and “do not know” combined account in some cases more than 50% (54.0% for military operations; 51.4% for support for developing countries; and 51.2% for the fight against terrorism and radicalisation), showing that people do not know much about specific actions and performance of the EU. The average number for the “neither good nor bad” answer is 32% (33% in 2015) and for “do not know” – 16% (24% in 2015).

As for the desirability/likelihood of EU global leadership, the combined figures of “very desirable/likely” and “somewhat desirable/likely” stand at 37.2% (equal to 37.3% in 2015) for both desirability and 37.6% (39.3% in 2015). Regarding topics to be mentioned in the politics frame, one of the most notable differences between 2015 and 2021 is the declining share of articles on terrorism and Islamic fundamentalism, a major topic in 2015, but its frequency dramatically reduced in 2021, reflecting that there were many Islam-related terrorist attacks in Europe back then and the situation has since then improved.

In the EU press coverage in Japan, the theme of politics is the second most visible (following culture and preceding economy) in the massive of articles which refer to the EU as to principal or secondary subject, and third most visible (following health and economy) in the articles which report on the EU as a principal subject. The EU is portrayed by the press mostly in a neutral tone.

Focus group participants and interviewees show more interest in the EU’s activities in the political domain. The more people know about the EU, the more they have stronger views on the EU – both negative and positive. A few interviewees expressed their positive views about the political value of the European integration project – the EU being a “laboratory in human history” and that pursuing “democracy, freedom of speech and liberty quite something and commendable.” Yet, it is important to note that those who appreciate such aspects of the EU are also aware of internal political and other problems facing the EU, demonstrating the existence of well-balanced and mature perceptions of the EU, at least among those who have deep knowledge of the EU in Japan.

FIGURE 62. DESIRABILITY VS. LIKELIHOOD OF EU GLOBAL LEADERSHIP COMPARED TO OTHER ACTORS. JAPAN



Note: based on Q4: How desirable is that each of the following countries and organisations take a strong leadership role in world affairs? And Q5: how likely or unlikely is it that each of the following countries and organisations will take a strong leadership role in world affairs five years from now? (n=1126) The horizontal axis presents the sum of “Very desirable” and “Somewhat desirable” responses to the Q4. The vertical access presents the sum of “Very likely” and “Rather likely” responses to Q5.

Climate and Environment

The EU’s role in the fight against climate change is seen as both important (69% for “very important” and “somewhat important”, an improvement from 61% in 2015) and positive (58.6% for “very positive” and “somewhat positive”). The EU is thus following the US (76.8%) and China (69.9%) as an important actor and Japan (62.3%) in perceived positivity. The US is seen as the most important actor, which seems to be because the country is the biggest economy globally and rather vague public perceptions of climate action on the global scale. The gap between the figure for importance and the negative-positive evaluation of climate actors proves that the public is aware that prominent actors do not always act positively. The relative number of articles on climate change can be seen as small, yet this could have been influenced by the way in which the articles were coded. One of the emerging features in the EU regarding climate change is that climate considerations can now be found everywhere, from the COVID recovery initiatives (European Green Deal) to corporate investment decisions. In other words, climate change has been “mainstreamed” and become more indistinguishable from other areas of EU policies, representing the biggest change since the 2015 Baseline Study. In 2015 EU-related articles on environment/climate change were more focused on environment/climate change per se, including the UN conference on climate change (COP21).

Press articles in the theme of climate and environment which report on the EU as a principal subject portray the EU in a neutral or negative tone. The theme, though, is not very visible in the Japanese press coverage of the EU and minuscule visibility in social media.

The focus group discussions and interviews have revealed that the EU’s role in climate change is highly recognised and valued largely positively. High expectations were repeatedly expressed, though experts (as well as newspaper articles, particularly those of *Nikkei*, an economic daily) cautioned the economic and social cost of the EU’s rather radical climate initiatives. The gap between “very important” (33.5%)

and “very positive” (17.3%) can be explained by the existence of some sceptical views about the effectiveness and economic rationale of EU initiatives (though many sceptics understand the EU’s importance – as the EU is seen as important, people need to worry about what the EU will do).

Energy

Energy is not entirely featured in traditional media (newspapers) or social media. But for experts and officials working on energy issues, it is one of the most contentious policy issues, and the position of the EU and that of the Japanese government are not always aligned, particularly regarding the use of coal for energy generation, closely related to the fight against climate change. Therefore, a similar pattern can be discerned in the energy frame as in the environment frame (just discussed above). For example, the EU’s ambitious renewable energy goals were hailed as a bold initiative, but recognising the impact the EU’s moves could have, cautious voices and worries were simultaneously expressed.

Research, Science and Technology

According to the result of the public opinion survey, the EU’s role in advancing innovation and technological progress in the world is ranked in third – 29.5% for “very important” and 36.5% for “somewhat important” – only after the US (47.2% and 27.6% respectively) and Japan (33.8% and 38.7% respectively). That the US is seen as the most important actor in science, research and technology are hardly surprising, and many Japanese still maintain their trust in Japan’s (Japanese companies’) capability to advance innovation and technology. Compared to 2015, perception of the EU role in advancing technological innovation has improved (from 61.5% to 66% for combined “very important” and “somewhat important” answers).

As for the EU, it remains unclear whether the public had the “EU” per se in their mind when answering this question, because what the EU is doing in helping innovation, particularly Horizon2020 and other EU schemes in this regard, may not necessarily be well-known among the public. The theme of research science and technology in the EU is not very visible in traditional and social media. It could well be that people thought of various German companies when answering the question.

This assumption is in line with the interview results, where a few experts expressed the view that innovation and technological progress are achieved at the national level, or even at the level of private companies, rather than in the EU.

The public opinion poll results, however, reveal that the biggest group of respondents associates the domain of science, research, and technology with Europe (28.2%), then with the EU (24.2%), and even smaller group – with individual European countries (15.4%).

Development and assistance

The level of awareness about the EU’s activities and role in helping developing countries remains relatively low. Though generally positive perceptions were found in the public opinion survey – the EU as “very important” at 30,8%, the second highest only next to the US (44,1%) and “somewhat important” at 37,3% - the fact remains that the weight of development-related articles and posts in newspapers and social media is quite low. This is also reflected in the fact that only 9,7% of public opinion poll respondents said the EU’s role is “very good” in the field of “supporting developing countries” – the second-lowest figure, only slightly higher than “military operations” (8,7%).

For the combined percentages of “very important” and “somewhat important” the EU (with 68.7%) comes at third place (after the US -75.6% and Japan -70.1%) in terms of the value of support to developing countries. The evaluation of the EU role has improved in 2021 compared to 2015 (60.5%).

The visibility of EU action in providing support for developing countries is minuscule both in Japanese traditional and social media. The interviews also revealed that even those with substantial knowledge about the EU are not fully aware of what the EU is doing in the development domain. Only those who work on development policy are familiar with the EU's role in international development. Though none of the interviewees is a development expert, it is assumed that development experts in Japan tend to possess rather negative perceptions of the EU since they often see the EU as a rival and an actor pursuing somewhat different development goals than Japan. The EU is focusing on basic human needs, while Japan on infrastructure.

Social

For the most significant share of Japanese respondents, the theme of social development is associated with Europe (28.2% compared to 24.2% with the EU).

Between 56% (overall quality of life) and 30% (reducing income inequality) of respondents positively evaluate EU performance in different aspects of social development. Apart from the overall quality of life, only two more indicators – level of education (54.9%) and equality between men and women (53.8%) are seen as “very good” or “fairly good” by more than a half of respondents.

A very significant share of respondents (between 40% for reducing income inequality and 23% for overall quality of life) choose the “neither good nor bad” and between 13% and 17% prefer “do not know” answer.

Those familiar with the situation in the EU expressed concerns about various social problems there, not least the issues of migrants and refugees' accommodation, social exclusion, income inequality and societal safety, some of which are believed to be linked to the rise of populism and extreme right movements. Integration of migrants and refugees is the only sphere of social development where the evaluations of the EU performance have dropped in 2021 compared to 2015 (by 12 percentage points). Compared with the 2015 results, “very good” and “fairly good” responses in 2021 are generally higher in most categories (by 8% on average). It is not clear what factors have brought this change, yet one possible explanation has to do with the fact that Islam-related terrorism was attracting much attention in Japan in 2015, which might have highlighted the negative aspects of European society in the eye of the Japanese.

Culture

For the Japanese public, the culture theme associates in the first place with Europe (39.1% of respondents choose this answer). Almost equal shares of respondents choose the answers the EU (15.6%) and specific European countries (14.8%).

In the culture frame – the cultural attractiveness – the EU (16,9% for “very attractive” and 39,6 for “somewhat attractive”) comes in third place following Japan (29,7% and 38,7% respectively) and the United States (22,5% and 38,2% respectively) in the public opinion survey. The “do not know” figure for the EU (15.7%), though slightly higher than Japan (11,0%) and the US (12,5%), was not particularly high compared with other countries. While the “not at all attractive” figure for the EU (7,1%) is a little higher than that for Japan (5,3%) and the US (5,4%), it is remarkably lower than that for China (41,7%) or Russia (27,1%), again showing that Japanese perceptions on the EU are generally positive in the cultural domain. As for thematic areas in the culture frame, music, arts, monuments, and museums received the highest figures for “very positive” and “fairly positive.” Compared to 2015, the overall attractiveness of the EU culture in Japan has decreased by six percentage points.

However, articles and posts in the “culture” frame appeared more as “Europe” than as the “EU.” 25% of posts referring to Europe discussed culture in social media, while only 6% in the EU dataset.

Conclusion this is hardly surprising that traditional cultures such as classical music, opera, ballet, fine arts, architecture and cuisine, and wine are usually associated with individual countries rather than the EU. The participants of the focus group and interviewees were fully aware of this. They talked about culture but repeated that they were talking about European countries, not the EU. As for the EUD activities in Japan, more than a few interviewees pointed out that the lack of visible cultural elements was the most significant comparative disadvantage of the EUD compared with MS Embassies. The major MS Embassies have a separate cultural centre or the government's cultural organisation, which even the public could identify.

The most attractive aspects of European culture in the eyes of the Japanese public are arts (63.4%), music, monuments, and museums (62.3% for all), and modern architecture and design (59.2%). The least attractive aspect is multiculturalism (48.8%). Compared to 2015, the evaluation of the European culture in Japan remained the same with only minor fluctuations (within three percentage points) in the assessment of the different aspects of culture.

Health

The "health" frame has suddenly become critical and controversial because of the COVID-19 pandemic. Europe is the region that was hit hardest in terms of the number of deaths, reflected by the substantial proportion of articles and posts on health. The "health" frame (as a separate entity) did not even appear in the 2015 Study.

In 2021 the theme is the most visible in press articles reporting on the EU as a principal or a secondary subject and the second most visible theme (after culture) in the quantitative analysis media dataset. The theme of health is the most visible on social media in posts relating to the EU (41%) and Europe (38%).

Japanese perceptions of the EU regarding health (global health or health governance within the EU) are mixed. First, at the initial stage, the surging death toll in the EU showed the problems of the way in which the EU (and the MS) dealt with the pandemic, which inevitably raised negative views on the EU. However, as some European companies (including the one in the UK) succeeded in producing COVID vaccines, Japanese perceptions began to change for the better. Then came the vaccination process. Again, its initial stage did not seem to have gone well in the EU – the vaccination process was initially quite slow, and the EU procurement and distribution problem raised frustration in some MS. However, since spring 2021, vaccination in the EU started to go smoothly and went ahead of Japan, which led to a notion in Japan that "Europe is doing well (better than Japan)" and naturally more positive views on the EU. Then the EU introduced a new vaccine export control mechanism, which ignited many concerns and criticisms in Japan, resulting in many newspaper articles in spring 2021. Many focus group participants and interviewees showed much interest in the vaccination process in the EU and vaccine export issues. If the COVID-19 pandemic continues, this sort of interest in global health issues will remain important. However, the centrality of this issue will evolve, and the two sides are rediscovering the fact that there are too many important issues to be addressed by the EU and Japan other than COVID vaccines.

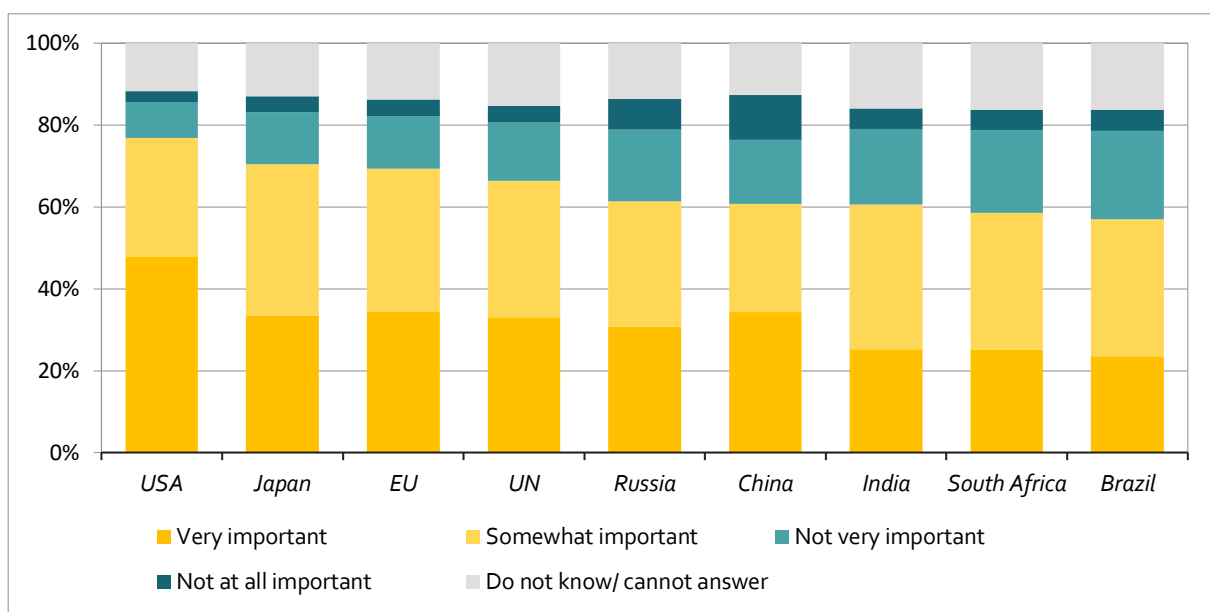
Continuity and change behind actorness

There does not seem to be any substantial change in terms of the actorness of the EU in Japan between the 2015 Study and this time. While many Japanese may not be fully aware of what the EU is actually doing in individual issue areas (frames), they tend to have generally positive views of the EU. They vaguely know that the EU plays an important role in such areas as trade and economy, foreign policy, and climate change. But this does not necessarily mean that those people always support EU policies. Some of them remain sceptical about the EU's positions and policies, particularly on climate change, renewable energy, privacy, and AI regulations. But since they understand the EU's influence, they pay

attention to the EU. What is more, some of those people expect the EU to take the lead on the international stage so that it could stimulate new debates in Japan. Another element of continuity has to do with the fact that the US and China, in almost all frames, possess a higher profile and visibility. This is unlikely to change in the foreseeable future. Given that one of the main reasons why those countries are visible is that they are controversial – in both positive and negative ways – it cannot be a situation in which the EU wants to see itself.

1.7.4. The EU as a norm-setter

FIGURE 63. PERCEPTION IN JAPAN OF THE IMPORTANCE OF EU, OTHER ORGANISATIONS AND COUNTRIES IN GLOBAL HUMAN RIGHTS PROMOTION. JAPAN



Note: based on Q11: In your view, how important, if at all, a role do each of the following countries or organisations play in promoting and defending human rights worldwide to protect human dignity, freedom, equality and solidarity? (n=1126)

The general public does not seem to have a clear idea about the EU’s role as an international norm-setter, not least in human rights. This is evidenced by the fact that figures for the EU as “very important” and “somewhat important” in human rights are essentially the same as those for Japan, which is not mainly known to promote human rights as its pillar of foreign policy. People’s mixed feelings are evident in the public opinion survey on specific elements of value-sharing between the EU and Japan. Regarding such things as human dignity, liberty, democracy, equality, etc., on average, 48% of respondents say EU and Japanese values are “definitely” or “more or less” similar (with the highest number of 54.8% for liberty and the lowest of 39.6% for pluralism). In comparison, only 3-5% say “not at all” similar. Notably, 24% of respondents, on average, chose “do not know” answer when replying if their personal values are similar to the values promoted by the EU. The numbers for “definitely” or “more or less” sim have slightly improved (by 4.6% on average) compared to 2015, while the share of respondents who chose “do not know” answers decreased by the same amount on average. This shows that the notion of “common values” between the EU and Japan is fairly spread and accepted. People still sense lingering differences between the EU (Europe) and Japan.

Normative images that the EU is a promoter of human rights and sets high standards for climate change and AI seem to be established in the Japanese media as well, common to all three outlets, stemming from EU-specific factors. Articles on the EU’s human rights sanctions against China regarding Xinjiang

and progressive initiatives on climate change frame the EU in a positive way and as an example to follow with questions as to Japanese actions and reactions towards these initiatives. Japanese media portray Japan and the EU as sharing fundamental values, including human rights and freedom, a reminder to the readers about what distinguishes Japan from China. Again, Nikkei has a slightly different approach, particularly in the climate change and AI domain in raising questions about the economic cost of enacting strict regulatory measures, particularly for Japanese private companies. Nikkei thus represents business interests more frequently. While a great deal of continuity in the normative dimension of EU perceptions in Japan from the 2015 Study can be discerned, the rise of China and the EU's more critical views and hardening position toward China makes this dimension more visible in Japanese media coverage, most notably demonstrated by the articles on human rights sanctions against China. Curiously, the EU's actions against Russia regarding the case of Navalny seem to be reported in a more neutral way, the normative elements not being particularly emphasised.

This kind of ambivalence was also evident in some of the interviews, where interviewees expressed frustration about the way the EU conducted human rights diplomacy and advocated a more pragmatic and quieter approach, particularly in Southeast Asia. One interviewee argued that "Asia is not Africa. It is important to know to what extent the EU is prepared to be flexible in its approach on human rights issues in Asia." Another interviewee said, "that the EU pursuing human rights in its foreign policy is commendable, but how it could ensure effectiveness is another issue."

Continuity and change behind the perception of EU as a norm-setter

The notion of the EU as an international norm-setter is now diverse, meaning it includes not just human rights and other issues related to fundamental rights, but more and more covers economic and other regulations in the world and institution- and capacity-building in developing countries. The EU's role and influence in international norm- and rules-making attracts a lot of attention in Japan, and it gives a strong incentive for the governments and the private sector to cooperate with the EU. This trend is set to continue. Japan's scepticism on the role of values in international relations, including in the Japan-EU relationship has not changed since the 2015 Study.

1.7.5. Continuity and change

As analysed above, the overall trend of Japan's perceptions of the EU has remained more or less intact. The old problem – the EU's low profile and the lack of awareness about the EU's policies and actions – and the old advantage – the EU's image is generally positive – remain in place. A few significant changes occurred regarding the "health" frame due to the COVID-19 pandemic, as repeatedly analysed above. The dominance of continuity may not sound particularly noteworthy, as both the EU and Japan are matured societies and radical things seldom happen. Yet, given the surprisingly rapid development of the EU-Japan relationship over the past several years, not least after the 2015 Study, the fact that the state of perceptions remains unchanged might look bizarre. This can be explained by two factors. First, the development of the EU-Japan relationship, exemplified by the conclusion of an Economic Partnership Agreement (EPA) and a Strategic Partnership Agreement (SPA), has been a government-driven process, which could have left many people behind. Second, even assuming that people are already on board in the strengthening of the bilateral relationship, it could still be argued that it takes more time for people's perceptions to change.

1.7.6. Recommendations for EU public diplomacy

The short-term objectives of EU public diplomacy in Japan (or in any other countries for that matter) are to promote EU policies and correct misunderstandings about the EU where needed. In contrast, long-term objectives include generating shared values and perceptions with the EU among the public,

or in other words, increasing the number of those who “love the EU.” Regarding the latter, it is of particular importance to reach out to the younger generations. Public diplomacy tools are undergoing significant changes, exemplified by the rise of SNS. Although the COVID-19 pandemic has disrupted many public diplomacy initiatives, most notably public events, it has also opened a new possibility of reaching out virtually to those who were not covered by EU activities in person in the past, such as those who live in small cities.

One of the most critical foundations on which the EU could conduct public diplomacy in Japan is that local perceptions of the EU and Europe are generally positive, and Europe’s history and culture are highly respected. This can be seen as a considerable advantage the EU/Europe possess compared to China or Russia in Japan.

- 1) The EUD needs to translate and publish more EU foreign policy documents in Japanese, particularly those related to the EU’s role in the Indo-Pacific region

Theme: Foreign policy

Process: The level of interest in Japan in the EU’s engagement in the Indo-Pacific region has increased substantially over the past few years. While the EUD is becoming more active in translating and publishing relevant EU documents such as Press Releases, it needs to do more. For instance, such important documents as the Joint Communication regarding China (March 2019) or the incoming (due in September 2021) Joint Communication on the EU strategy on cooperation in the Indo-Pacific need to be translated into Japanese in full, not just abstracts. The fact that not many Japanese, including those interested in international relations and the EU, are willing to read long EU documents in English needs to be taken into account. The EUD should reach out to those who read only Japanese. That the EU is deepening its engagement in the Indo-Pacific region and more specifically, that the EU is introducing a series of measures to address challenges posed by China’s actions, including investment screening, subsidies control, measures to address economic coercion, export control, cyber and human rights sanctions should attract more attention in Japan, where the general public’s scepticism about China is remarkably high. Yet, not many people, including the interested public, do not seem to be aware of such measures. There is much more room for improvement in this regard.

- 2) The EUD should create a new venue to discuss the social implications of new (emerging and disruptive) technologies and climate change issues

Theme: Research, science, and technology / climate change

Process: As the analysis above shows, there is a substantial amount of scepticism in Japan about the EU’s efforts of regulating new technologies, particularly artificial intelligence (AI) and the issues related to digital data. The existence of different views between the EU and Japan itself is hardly surprising, and there are differences within Europe as well. However, given that the importance of those issues is highly likely to increase in the coming years, it is high time to begin a more concerted effort to reach out not only to the science community in Japan, but also to the business community so that new technologies could be a promising cooperation agenda for EU-Japan relations. Japanese scepticism should not be left unaddressed. The same can be said regarding climate change. At the political level, both the EU and Japan emphasise climate change cooperation (green alliance). Nevertheless, it is no secret that Brussels and Tokyo have a substantially different approach to climate change, as evident in their respective electric vehicle (EV) strategies and the phasing out of the internal combustion engine.

- 3) More considerations about how the EU could be seen in the context of political spectrum in Japan

Theme: domestic politics

Process: It needs to be recognised that the EU is arguably more popular among social liberals in Japan than among social conservatives, because the EU (including the EUD) often highlights the values for which the EU stands, such as equality and diversity, including LGBTQ rights women empowerment and opposition to the death penalty. However, the fact remains that social conservative voices are vital in the ruling Liberal Democratic Party (LDP), making managing EU perceptions among the ruling party politicians difficult. They view the EU as leaning toward a liberal (left-wing) direction, and there seem to be growing gaps between the (mainstream) EU and Japan. In some ways, this is an issue beyond the realm of perceptions as it could just be seen as an appropriate reflection of the reality on the ground. However, it is by no means in the interest of the EU/EUD to alienate ruling party politicians and their supporters. Therefore, while standing firm on those values, the EU simultaneously needs to highlight the fact that the EU is hardening its stance vis-à-vis China and strengthening its political and security engagement in the Indo-Pacific region as a counterweight to seemingly negative views of the EU among Japan's social conservatives because those people generally welcome the EU's direction in this regard.

Overall practice- and policy-oriented suggestions

1) Reach out to the younger generations – more tailored approach is needed

While the opinion poll for this study does not show generational gaps, it is clear from various opinion polls in Japan that the younger generations support the values of diversity, equality, and sustainability than the older generations, suggesting that what the EU stands for are much more shared with the younger generations. This needs to be taken more into account in the EU's public diplomacy activities. More focus on the younger generations is thought to be more effective because they are more receptive to the EU's values, and the effect is likely to continue longer because they are the ones who will shape the Japanese society in the years and decades to come.

To reach out to the younger generations, organising more events in collaboration with high schools and universities can be envisaged. At the same time, using LINE for delivering EU-related information would also be an effective way as many teenagers heavily use LINE for information gathering/exchange and communication among them (they seldom use Facebook, which is rapidly becoming an SNS for older generations). Instagram is also something the younger generations heavily use.

At the same time, reaching out to the older generations – establishment-types – remains an essential pillar of the EU's public diplomacy and public relations activities. While they use SNS (Facebook and Twitter), what distinguishes them from others, including the younger generations, is that they still depend a lot on emails, meaning that e-magazine and other types of information sent by emails remain effective. Some interviewees for this study mentioned EUMAG, the EU Delegation to Japan's e-magazine as an important source of information about the EU. They receive EUMAG through email and access its website. This rather traditional channel seems to be still working – for them, it is easier than following SNS posts by the EU Delegation.

2) Reach out to cities/regions other than Tokyo

Given the fact that some significant Member States have a higher profile and more visibility than the EU (EUD) in Japan, it is in the EU's (EUD's) own interest to collaborate with MS (MS Embassies) in Japan whenever possible. Yet, striking the right balance between central MS and small MS in this regard could be a difficult challenge, because if the EU wants to take advantage of working with MS to extend its reach, it is likely to focus on central MS at the expense of smaller MS. Nonetheless, the EU (EUD) working only with major MS in Japan will not send a good message to the Japanese audience and will likely frustrate small MS. Still, another area where the EU needs to work with major MS is local cities other than Tokyo. Some major MSs have General Consulates, Consulates or Honorary Consulates in some local cities like Kyoto, Osaka, Nagoya, Fukuoka and Sapporo. The EUD lacks such a local network.

1.8. Mexico

This Country Chapter presents a synthesis of the Mexico-specific findings of traditional and social media analyses; interviews with multipliers and influencers; focus groups with university students and public opinion poll conducted in the framework of the Update Study 2021. The structure of the chapter follows the logic of the research design. We present the main findings for Mexico according to the indicators guiding the 2021 Study: visibility; actorness; local resonance; and norm-setting. We also discuss findings according to the themes analysed in this study: economy and trade; political issues; development; social issues; environment; energy; science, research, and technology; culture; and health. The penultimate section looks at the drivers behind perceptions of the EU and Europe in Mexico. We conclude the chapter with recommendations for EU public diplomacy in 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.

1.8.1. Sample

Public opinion

The online survey was coordinated and conducted by PPMI through an online panel provided by Syno International. The respondents in Mexico were surveyed in Spanish. The data collection took place from 28 April to 16 May 2021. The sampling for the survey was designed to be nationally representative of age, gender and regions. Respondent profiles in Mexico were established based on data from the Mexican National Institute of Statistics and Geography (INEGI)²⁹. The survey included 1,227 individuals aged between 15 and 64 years old³⁰.

Media

The quantitative media analysis was carried out by PPMI. This section of analysis focuses on the general trends in a large press media sample that includes four popular prestigious dailies *La Jornada*; *El Universal*; *Reforma*; *Milenio* and two business newspapers *El Financiero* and *El Economista* – all monitored between 1 February and 30 April 2021. The *Factiva* repository was used to aggregate content from both licensed and free sources, and in-house data processing was applied to produce the results.

The dataset consists of two parts, collected in Spanish during the observation period: one focusing on the "EU" (825 articles) and another one on "Europe" (2,662 articles). Search terms for the dataset "EU"

²⁹ Mexican National Institute of Statistics and Geography (INEGI): <https://www.inegi.org.mx/>

³⁰ Detailed public opinion survey data are available in Annex II of this Report – Comparative public opinion survey report.

are: “European Union”, “EU”, “European Commission”, “European Parliament”, “Court of Justice of the European Union”, “EU presidency”, “EU Council”, “European Council”, “Council of the European Union”, “Eurozone”, “European Central Bank”, “European Investment Bank”, “European Medicines Agency”. The search terms for the dataset “Europe” are “Europe”, “European” and “Europeans”. The search terms for “EU” and “Europe” datasets consider both plural and singular forms as well as possible grammatical forms of the search terms in the local language. Europe dataset excludes articles containing any of the “EU” dataset keywords.

The qualitative media content analysis of news that reported the EU as a major focus/theme (134 articles) was designed, supervised and coordinated by experts from Public Diplomacy and Political Communication Forum (PD-PCF), University of Canterbury (UC), New Zealand, and conducted by country experts trained by the PD-PCF UC. PPMI collected the media sample using the search engine for the in-depth qualitative content analysis from two prestigious newspapers *La Jornada*; *El Universal* and one business newspaper *El Financiero*. The timeframe of observation remained the same as for the quantitative and social media analyses. Country Experts analysed the EU image created by applying elements of content, cognitive and critical discourse analyses.

Social media

PPMI carried out the social media analysis. The data collection process was automated using the online social media monitoring tool *Mediatoolkit*. Social media posts were collected from Twitter, Facebook and Instagram with the use of automated queries. Coverage of the EU was traced using a set of the EU-related keywords: “European Union”, “EU”, “European Commission”, “European Parliament”, “Court of Justice of the European Union”, “CJEU”, “EU presidency”, “EU Council”, “Council of the European Union”, “European Council”, “Eurozone”, “European Central Bank”, “European Investment Bank”, “European Medicines Agency”. All the keywords were additionally traced in one-word format to capture related hashtags: europeanunion, europeancomission, europeanparliament, courtofjusticeoftheeuropeanunion, eupresidency, eucouncil, europeancouncil, counciloftheeuropeanunion, europeancentralbank, europeaninvestmentbank, europeanmedicinesagency. Europe-specific keywords used for filtering relevant social media posts are “Europe” and “European”. Europe dataset excludes posts containing any of the “EU” dataset keywords. Additionally, the mentions were filtered through a location filter to ensure that the collected mentions originate from Mexico. A language filter was set up to collect posts in English and Spanish.

The resulting sample of Mexican social media posts collected from 1 February to 30 April 2021 includes 93,050 mentions, of which 30,121 reference the EU (88% in Spanish) and 62,929 reference Europe (90% in Spanish).

Interviews and focus groups

Interviews with local opinion- and decision-makers as well as focus groups with students were conducted by the Country Experts, with training support and supervision from PD-PCF, UC, following the approval of the UC Human Ethics Committee. As part of this study, interviews and focus groups aim to provide in-depth explanations about Mexican perceptions of Europe and the EU and cross-reference the findings from the public opinion survey, traditional and social media analyses.

The *focus group* consists of ten undergraduate students (five female and five male students, aged between 21 and 24 years) from four cities: Mexico City (capital-5 students), Tijuana (border with California-3 students), San Luis Potosi (Center-2 students) and Monterrey (well-known industrial city-1 student). All are senior students of diverse academic backgrounds and institutional affiliations majoring in international relations, political science, economics, business and history. While all the participants had taken a course about Europe or the EU, only three have travelled to Europe and four

have had contact with European students in Mexico. None of the participants have studied in Europe. Focus group participants are more aware of the EU than most Mexicans in general and even other college students outside the social sciences.

The interviews with *multipliers and influencers* were conducted via Zoom between June 1 and June 18, 2021, by the Country Experts. Interviews were held in Spanish, recorded on Zoom, and the respective notes were entered in the unified template developed for this Study. Country Experts held 13 individual interviews with *multipliers and influencers*: 2 from academia, 2 from think tanks, 3 policymakers, 4 government officials, and 2 media representatives.

Semi-structured, anonymous qualitative group interviews under Chatham House Rules were conducted with all EU Delegations across the 13 key partner countries. Interviews lasted between 60 to 90 minutes. The group interview with representatives of the EU Delegation to Mexico was conducted on 31 March 2021 by members of the Core Team (PD-PCF UC and PPMI) and the Country Expert.

1.8.2. Visibility

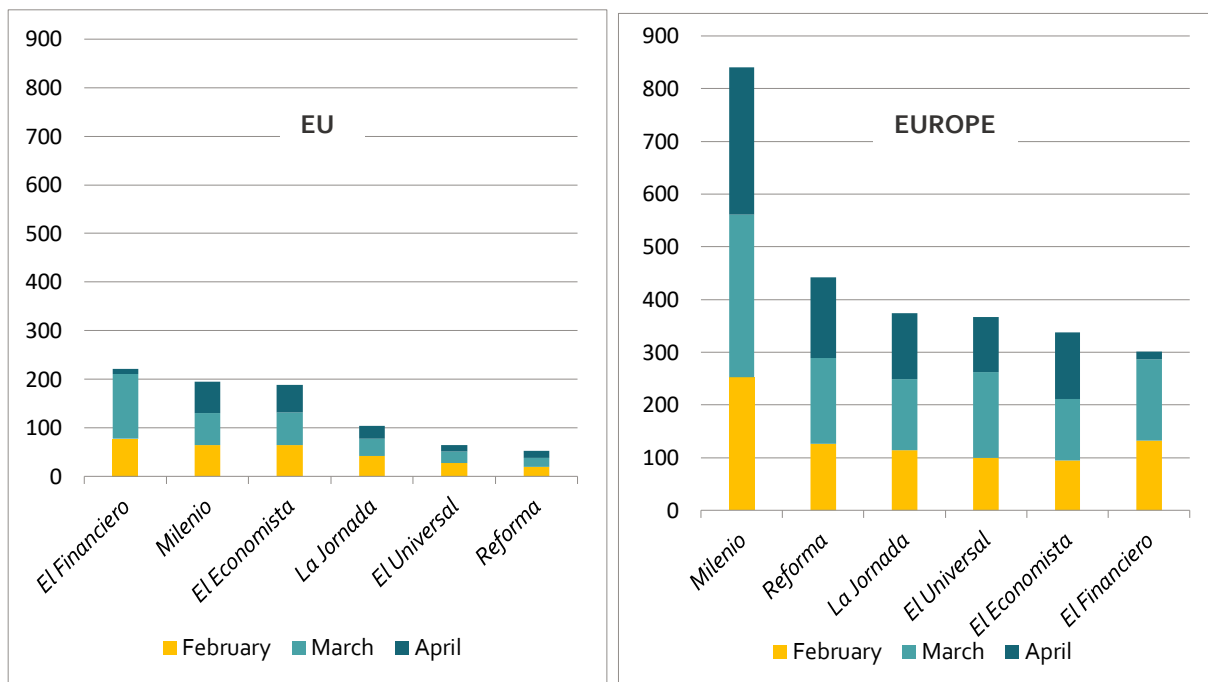
The visibility of the EU has slightly increased in Mexico since 2015. Although the online survey indicates that Mexican public is slightly less indifferent towards the US, UN, China, and Brazil than the EU, it also shows that only 1.9% of respondents in Mexico do not know or cannot indicate how positive or negative they feel about the EU (a proxy indicator of awareness). Moreover, in 2015 the survey ranked Russia and Japan higher than the EU and 4% of survey respondents could not indicate how they felt about the EU. In 2021, four international actors are seen as playing a significant role in Mexico: the US, that is perceived as a highly influential actor in Mexico in general and historically – also recurrently mentioned in focus groups and interviews; the UN, which is referenced as part of the priorities of Mexican foreign policy; China, seen as increasingly present in the Mexican economy; and Brazil, regarded as a competitor of Mexico as it is the largest economy in South America.

When compared to the findings of the 2015 Study, associations with the EU remain quite similar. In the 2015 report, the EU was mostly described as multicultural and modern; and least often described as hypocritical, aggressive, or arrogant. In 2021, a large share of respondents considers the EU modern (52.8%), strong (44.3%), efficient (43.5%), united (38.2%) and multicultural (27.2%). Japan is the only country referenced more frequently than the EU in terms of being modern (75.6%, strong (53.8%), efficient (57%), and united (42.5%). The US is seen as stronger (49.9%), more modern (63.2%) and multicultural (29.3%), and China as stronger (46.9%), more modern (62.7%) and efficient (47.8). The rest of the partners are seen as more advanced in much fewer associations: Russia as stronger (60.8%), Brazil (31.4%), India (30.1%) and South Africa (27.9%) as more multicultural than the EU. Only 5.2% of respondents associate the EU with negative descriptors, such as “hypocritical”, 4.7% “arrogant”, and 4.1% “aggressive” (in contrast to 7.3%, 14% and 8.4% respectively in 2015). Moreover, the US and Russia are more frequently referenced with negative descriptors than the EU: “aggressive” (26.8% and 25.6% respectively); “arrogant” (24.5% and 12.6%); and “hypocritical” (13.1% and 5.4%).

The perception of the EU as a modern and efficient entity is also reflected in how the Mexican public evaluate EU actions in various sectors. Out of 14 activities included in the public opinion survey, the perceptions of the EU are most positive (“very good” and “fairly good” counted together) in the areas of tourism with 87.4% (83.4% in 2015), global trade with 85.5% (79.6% in 2015), medical research with 84.8% (77.8% in 2015), science and research with 83.6% (78.7% in 2015) and development of new technologies with 81.1% (79.3% in 2015). However, the poll also finds inconclusive responses in the category of “neither good nor bad” are high in the cases of agriculture with 27.7% (28.2% in 2015), entertainment with 24.8% (30.5% in 2015) and space exploration with 25.7% (31.7% in 2015). “Fairly bad” and “very bad” evaluations are more visible in the cases of agriculture with 4.4% (5.5% in 2015), global health with 3.6% (not included in the 2015 survey), space exploration technologies with 4.3% (6.1% in

2015), green technologies and sustainability with 3.7% (3.3% in 2015). One of the factors behind the EU’s visibility is how frequently TV, radio, internet, newspapers, or magazines publish EU-related news. The public opinion survey conducted for this study indicates that only 27.9% of the public read or heard about the EU "more or less every day" and 35.6% "about once a week" – a total 63.6% of the sample. Less informed about the EU are 36.4% of the public, who read or hear about the EU once a month, rarely or never. One of the interviewed government officials indicates that ‘probably, people in general, would not know what the EU is, if you asked them’.

FIGURE 64. VOLUME OF NEWS ITEMS WITH A REFERENCE TO THE EU AND EUROPE IN TRADITIONAL MEDIA. MEXICO



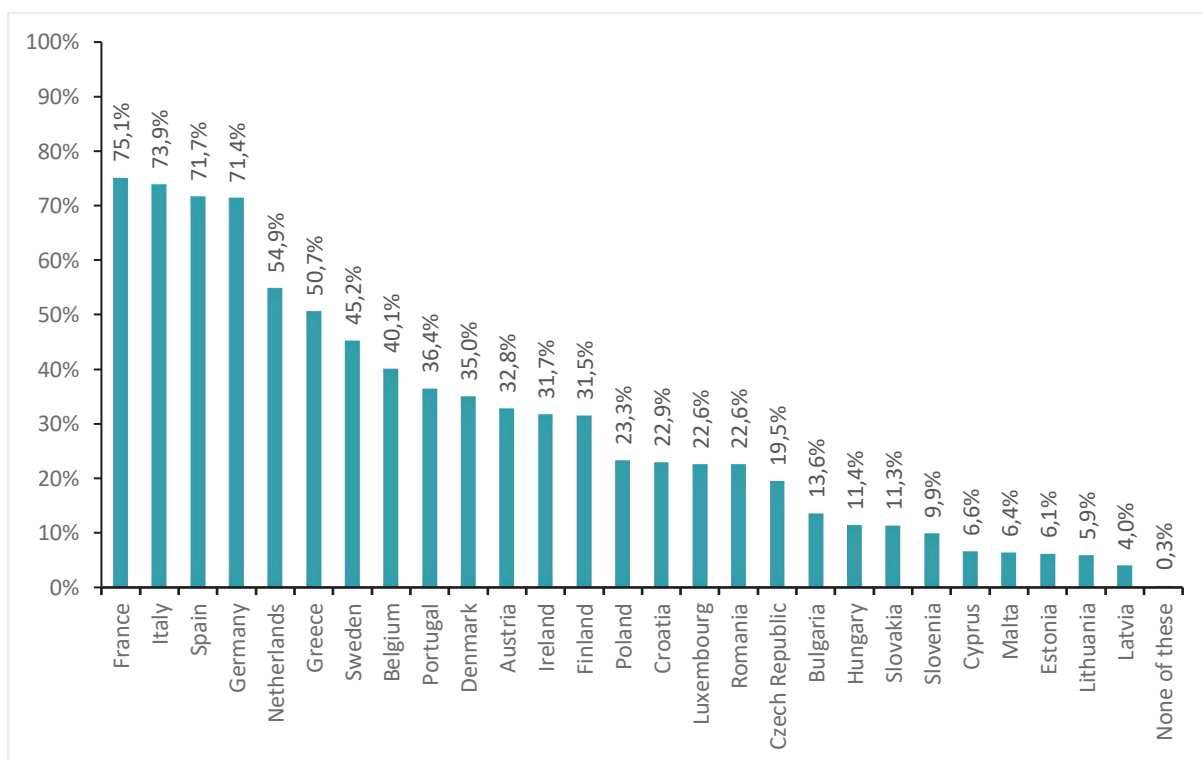
Note: based on automated quantitative data analysis. Includes press articles which report on the EU and Europe as a principal or secondary subject of the article.

In addition, *media* coverage of “Europe” is significantly higher than that of the EU throughout the period of observation in this study: 76% vis-à-vis 24% of the total traditional media sample. The same is true for *social media* (Annex IV). In traditional media, the visibility of the “EU” dataset is higher in March (41.8%) and February (35.6%) in comparison to April (22.5%). Coverage for “Europe” is higher in March (39%) than in February (30.8%) or April (30.2%). The degree of centrality for EU articles is average for all traditional media outlets: the share of articles that portray the EU as a major topic range between 32.6%-44.6% of the sample. In the qualitative sample that focuses on the EU news with the major degree of centrality, *El Financiero*, a business newspaper, has published the largest number of articles (70), followed by *La Jornada* (34), and *El Universal* (30) in the period of observation. News about the EU in the sample are mainly published in the health (38 articles) and world sections (33), followed by politics (10) and economy (9). In these sections, the EU has high visibility as the primary actor (52% of the sample) or secondary actor (30% of the sample). The coverage of the pandemic positions the EU and EU related actors visibly. The articles are usually average length, and all news outlets share a similar number of longer articles. The peak in Europe-related posts on 19 April 2021 is linked to the discussion on creating a European Super League.

Visibility of EU institutions and EU leaders. Visibility of Member States and their leaders

Due to the pandemic, in both the “EU” and “Europe” datasets, the European Medicines Agency is the most frequently mentioned EU institution. The media pays slightly less attention to the European Commission (83) and the European Central Bank (74). Fewer articles mention the European Parliament (30), European Council (11) and European External Action Service (3), European Investment Bank (2), Court of Justice of the European Union (1). In Mexican *social media*, the European Commission is the most frequently mentioned EU institution (1,702 times). The European Parliament (1,515) and the EMA (1,411) receive slightly less public attention. The European Council (156), European Central Bank (117), European Court of Justice (92) and European Investment Bank (74) are mentioned less frequently, followed by the Council of the EU (13), the European Committee of the Regions (9), the European External Action Service (4), European Court of Auditors (2) and European Economic and Social Committee (1). In traditional media, in addition to the high visibility of the EMA, articles also covered the European Commission in the context of the EU’s handling of the COVID-19 pandemic and in news about the EU-Mexico Agreement; the European Parliament features in views on tensions with Russia; and several articles refer to the EU Delegation to Mexico explaining the rationale behind the EU’s restrictions for vaccines exports. Among EU officials, Josep Borrell is mentioned in different aspects of EU-Russian relations and in the reactions to the EU’s policy on the exports of vaccines. Articles that focus on various aspects of EU actions in the pandemic also reference Ursula von der Leyen. Given the Greek crisis and the Iran Deal, the 2015 Study found that the European Commission and the European Central Bank were by far the most mentioned EU institutions and Jean Claude Juncker and Federica Mogherini were the most frequently mentioned EU officials.

FIGURE 65. ATTRACTIVENESS OF THE INDIVIDUAL EU MEMBER STATES. MEXICO



Note: based on Q25: Please indicate which European countries look the most attractive to you? Respondents could choose more than one country (n=1227). Respondents were not limited in the number of countries they could name.

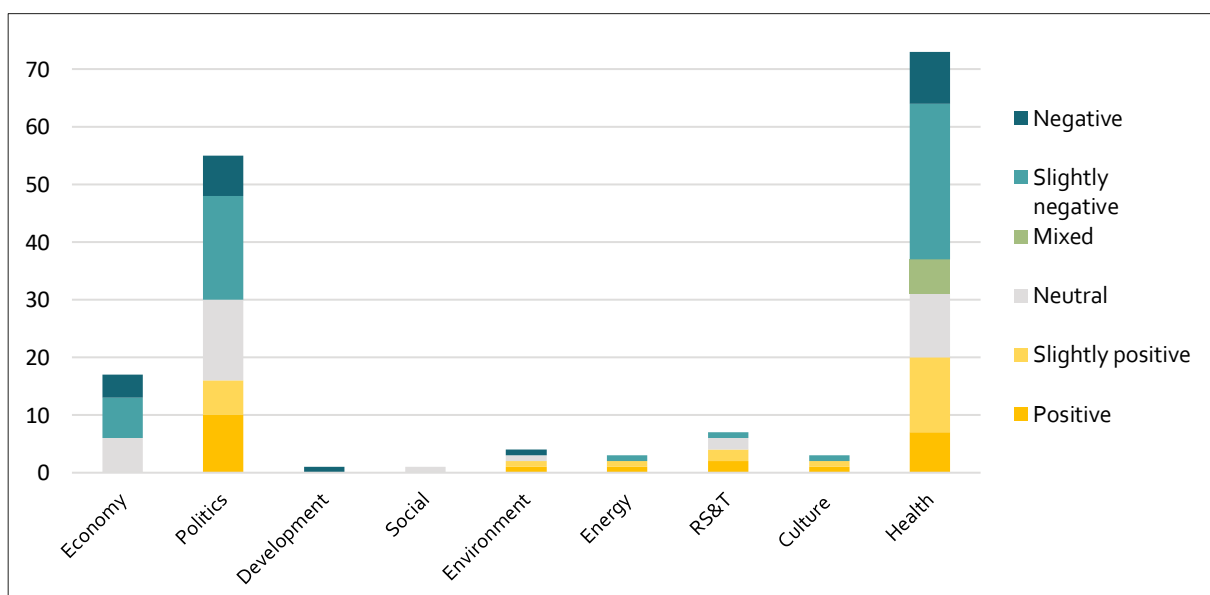
Spain, Germany, Italy, France and Belgium are the most mentioned Member States in the samples with some variations. In traditional *media* (press), Spain, Germany, France, Italy, and Belgium are the most

mentioned Member States. In Mexican *social media* posts), Spain (6,660), France (1,950), Germany (1,888), Italy (1,647) and Belgium (874) are the most mentioned Member States. The Mexican public identifies, in decreasing order, France, Italy, Spain, Germany and Netherlands as the most attractive European countries. Along the same lines, individual interviews with influencers and multipliers identify the UK, Spain, France and Germany as the most important and attractive Member States and indicate the important role of German foundations in Mexico. While the attention to individual Member States is also mainly associated with the pandemic, media covers national events related to regional political tensions (Spain), domestic protests (France) and political crisis (Italy). On Heads of States and EU officials in *social media*, the highest number of mentions are of Pedro Sanchez (elections in Catalonia), followed by Angela Merkel (lockdown), Emmanuel Macron (NATO) and Viktor Orban (position of Hungary in the pandemic). Focus groups participants identify Angela Merkel in a positive way, while the image Boris Johnson (NB: the UK is no longer an EU member) is perceived negatively. In 2015, the Greek Prime Minister Tsipras and the German Chancellor Merkel were the most visible leaders as they were linked to the tensions around the economic crisis, followed by the British Prime Minister Cameron (Brexit).

Emotive charge

The automated sentiment analysis had limitations to evaluate the emotive charge in the Mexican quantitative traditional *media* sample in Spanish. However, the qualitative media analysis shows that the three Mexican outlets in the sample assign EU news with a similar emotive charge – neutral-to-negative, with some more critical articles in *La Jornada*. The reaction to the EU's vaccine export control is framed starkly negatively with evaluations such as 'EU hoarding vaccines' or the 'geopolitics of vaccines is rampant'. EU relations with Russia are also visible in the media and often described as 'tense' or at 'one of the lowest points'. In *social media*, the emotive charge of EU-related posts is also more negative (37.4%), followed by positive (33.3%) and neutral (29.3%). In 2015, the emotive charge of EU coverage in traditional media was between neutral and negative in the three newspaper outlets. *La Jornada* was the most critical of the EU.

FIGURE 66. EMOTIVE CHARGE IN PRESS ARTICLES REPORTING ON THE EU AS A PRINCIPAL SUBJECT. MEXICO



Note: Based on qualitative media analysis conducted by country experts. One article can reflect more than one theme.

Continuity and change behind visibility and emotive charge

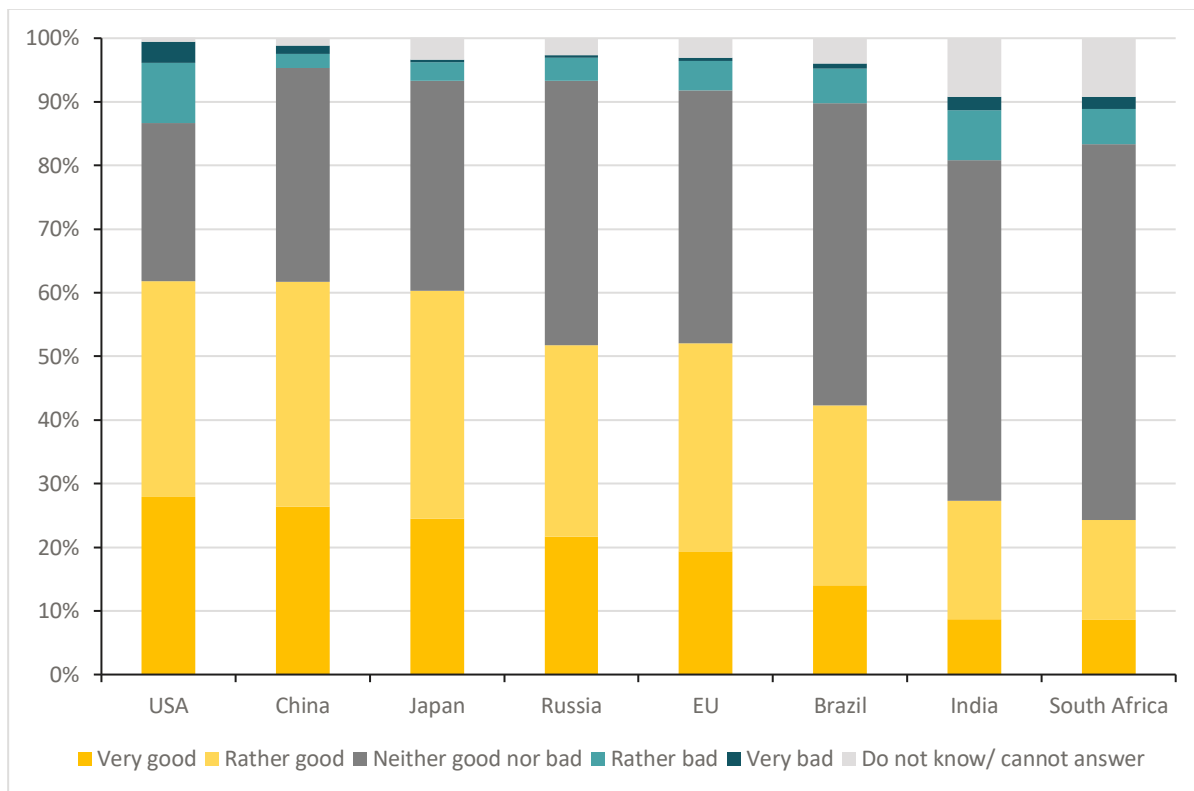
The visibility of the EU in Mexico experienced minor changes since 2015. Based on the online survey, the main change since 2015 is that the Mexican public is slightly more aware of the EU: as seen above, in 2021, it ranks higher than Russia and Japan. The visibility of EU institutions is linked to the crises faced: in 2021, the EMA (pandemic) is the most visible EU actor, while in 2015 this was the ECB (in reference to the Greek financial crisis). Given its multi-thematic competences, the European Commission's visibility remains high, followed by the High Representative for External Relations, who is visible particularly during international crises (Mogherini dealing Iran in 2015 and Borrel dealing with Russia in 2021). The emotive charge in social media shows a slight negative tendency in the perception of the EU in contrast to the "Europe" dataset where positive sentiment dominates. In the traditional media analysis, EU news that portrays the EU as the focus of reportage also receives neutral to negative evaluation. Compared to the 2015 report, there is continuity in that politics remains one of the most visible thematic frames (except in *El Financiero*) with a trend of negative emotive charge. The main element of change in the image of the EU is the extreme visibility of health theme due to the COVID-19 pandemic, which was not the case in 2015. Evaluations in this theme also range between neutral to negative. From a different method, interviews and focus groups further reveal mixed perceptions that vary from positive initial images of European culture, development, inclusion, and progress to criticism of the EU's activities in tackling immigration, combatting extremism, or achieving solidarity in the provision of COVID vaccines to the Global South.

1.8.3. Actorness and local resonance

The EU as a partner

The general evaluation of Mexico's relationship with the EU is ranked as "very good" and "rather good", yet second to the relationships with the US, China, Japan, and Russia. When asked about opinions on the EU on selected issues, the Mexican public "strongly agree" and "agree" that Mexico should have stronger ties with the EU with 77.3% (82.5% in 2015). They also find the EU to be an important with 77.1% (72.2% in 2015) and trustworthy with 75% (69.3% in 2015) partner. The survey also shows a share of respondents who "neither agree nor disagree" with the importance of the EU as a trustworthy with 18.8% (21.9% in 2015) and important with 16.3% (18.8% in 2015) partner in international relations.

FIGURE 67. EVALUATION OF MEXICO RELATIONSHIP WITH THE EU AND OTHER COUNTRIES

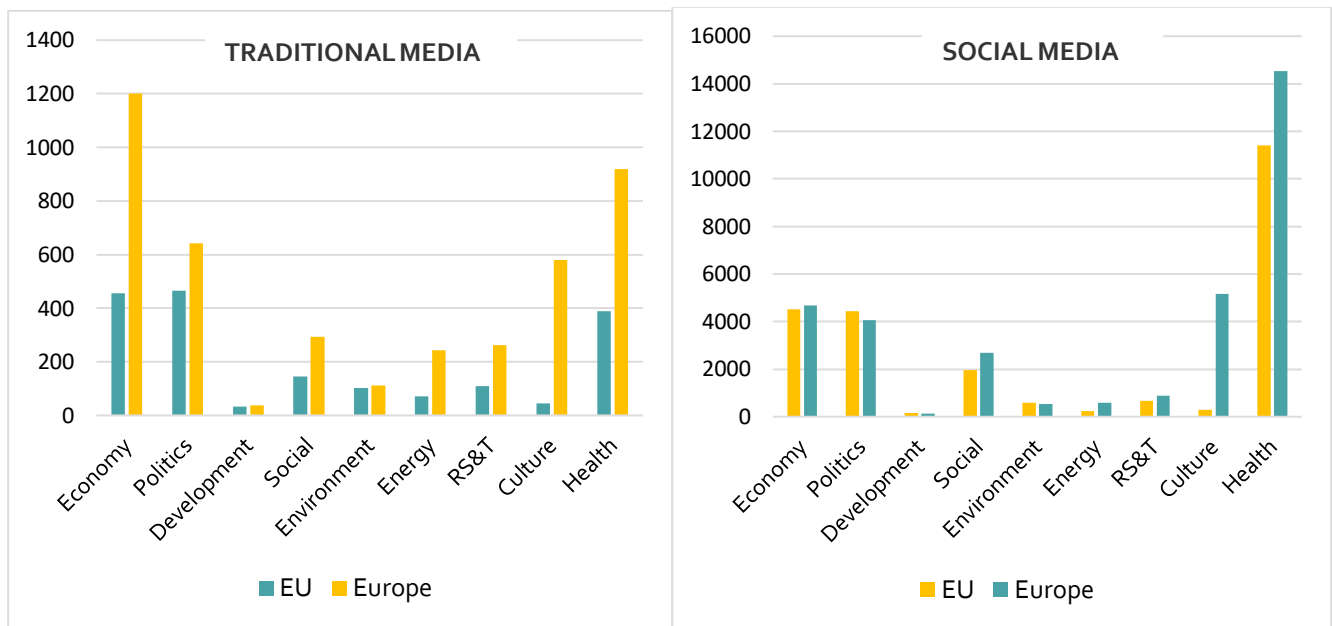


Note: based on Q3: Which of the following words best describes your country’s overall relationship with each of the following countries and organisations? (n=1227)

Likewise, most of the 13 interviewees agree that the EU is an important partner to Mexico, but they also indicate that the bilateral relationship is tainted by the current approach of the Administration of President Lopez Obrador, but also by a perceived limited interest of the EU in Mexico in general. One interviewed policymaker indicates that ‘there is a disarticulation in the EU-Mexico agenda’ (MEX1POL), and the interviewed media professional mentions that ‘in addition to geographical distance, which still matters in today’s world, it can be noted that Mexico is not a priority... and not all EU countries are interested in advancing relations with Mexico, it’s only a few’. Meanwhile, those EU actions that are relevant to Mexico heighten its visibility, particularly in the media. News with a “local hook” focus on EU regulations of vaccine exports, which concern the Mexican government and sparked declarations from Marcelo Ebrard, Mexican Minister of Foreign Affairs, Josep Borrell, High Representative of EU foreign policy, and the EU Delegation to Mexico.

According to the survey, media is the main source of information about the EU to the Mexican public, particularly online media, television channels, social media, and streaming platforms. Print media in the qualitative sample use a variety of sources: *El Financiero* relies heavily on international news sources, mainly Bloomberg (27 articles) and AP (25); *El Universal* depends on the local news agency *Agencia El Universal* (19); and *La Jornada* only few articles referenced international news source are Prensa Latina (1) and Sputnik (1). The articles published in *La Jornada* are produced by regular contributors (Alfredo Jalife-Rahme, Juan Pablo Duch, and Emir Olivares Alonso). Emilia López Pérez covers news about Europe in *El Financiero* and the Europe correspondent of *El Universal* is Inder Bugarin.

FIGURE 68. THEMATIC FOCUS OF SOCIAL MEDIA AND PRESS ARTICLES REPORTING ON EU AND EUROPE. MEXICO



Note: based on automated quantitative data analysis. Includes press articles which report on the EU and Europe as a principal or a secondary subject of the article. One article can reflect more than one theme.

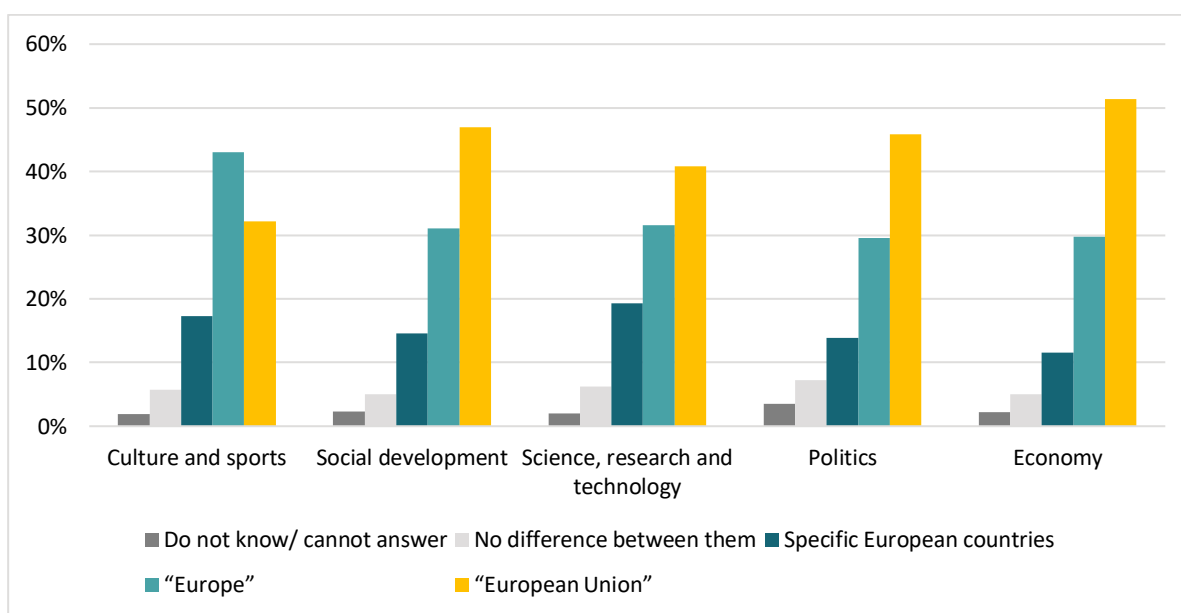
In Mexican media overall, the “EU” is more often referenced in politics (26%), economy (25%) and health (21%). Meanwhile, the order in the themes that reference “Europe” is reversed: economy (28%), health (21%), and politics (15%). The “Europe” dataset also has a significantly higher coverage of culture (14%) compared to the “EU” dataset (2%). Among the outlets, *El Financiero* newspaper focuses mostly on economics across both datasets. For both “Europe” and “EU” datasets development has the lowest coverage (2% and 1% respectively). The qualitative media analysis, which covers three newspapers and EU-related news with the EU’s pronounced visibility only, shows that the primary coverage of the three media outlets (69 articles as principal and secondary frame) is on different aspects of EU policies addressing the pandemic. Most articles are mixed, negative, and neutral in their portrayal the EU. Only few articles frame the EU positively in this theme (mostly on vaccine safety and regulations). In the thematic frame of external politics (38), *La Jornada* covers slightly more articles than the other two news outlets. *El Financiero* published more news on the theme of internal politics (17) and the economy (16). Finally, themes that have received less attention in media are science, research and technology (6), environment/climate (5), energy (3), culture (3), development (1) and social issues (1). Similarly, to the findings of the press analysis, in Mexican *social media* posts, the EU is most often mentioned in reference to health (47%). A considerable share of posts reflects economic (18.6%), political (18.3%) and social (8.1%) issues. In comparison to the EU, Europe is much more often mentioned in connection with culture (15.5%).

Regarding the emotive charge in thematic frames in *social media*, in decreasing order, the EU and Europe are positively perceived in culture and social in more than 40%; and research and technology, energy, environment, development, economy, politics and health between 30% and 40%. On the other hand, out of five thematic frames in the survey, the Mexican public associated more the EU than Europe in the economy (51.4%), social development (47%), politics (45.8%), science and technology (40.8%), while associated more Europe and the EU in the case of culture and sports- (only 32.2% associated to the EU).

Economy and trade

Economy is one of the most visible themes in the perceptions of the EU in Mexico. Media articles cover the modernisation of the EU-Mexico Global Agreement, the costs associated with the electricity reform in Mexico and the economic effects of Brexit. Publications assign the EU mostly with mixed, negative and neutral evaluations. Participants in the focus group (educated youth) also rank the economy as the most important field of cooperation with the EU and expect more cooperation in aid, investment and trade. One of the experts mentions that ‘the reasons the EU is perceived as a strong economic actor is because economic interests drive EU relations with Mexico. This is the case of the modernised EU-Mexico Agreement’ as well (MEX5AC).

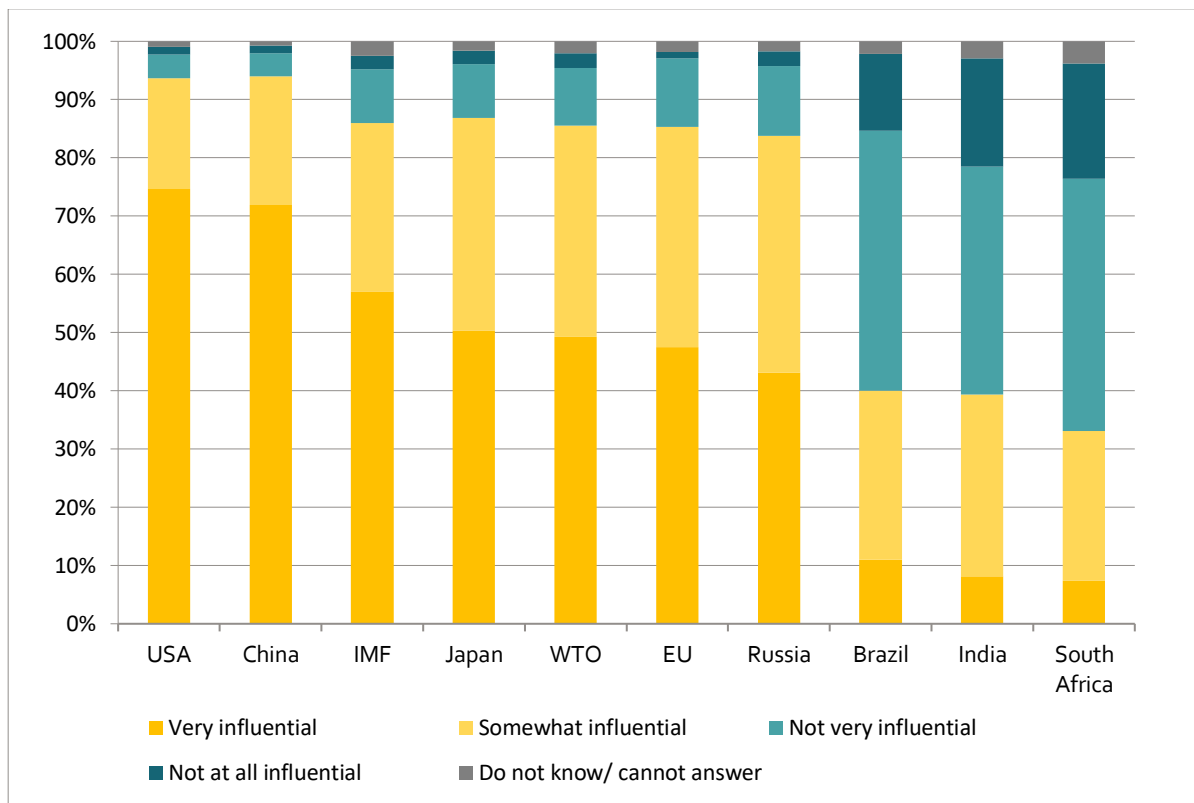
FIGURE 69. ASSOCIATION OF DIFFERENT AREAS TO THE EU VERSUS EUROPE. MEXICO



Note: based on the answers to Q22: Some people think about Europe, whereas others think about the European Union when talking about economy, politics, culture, sports, and other areas. In your case, which term – Europe or the European Union - comes to your mind first when you think about the following subjects? (n=1227)

When the EU is compared to other countries and organisations in global economic affairs, public opinion ranks the EU (47.4%) sixth after the US (74.6%), China (71.9%), IMF (57.1%), Japan (50.3%) and WTO (49.2%) in terms of its global economic importance. Compared to 2015, the EU was ranked fifth, ahead of Japan. When the public are asked about the EU’s economic role in Mexico, the perception of the EU as a critical economic player is mainly positive. Under the categories of "strongly agree" and "agree", 84.5% of the participants in the survey mention that the EU should have stronger ties with Mexico; 76.5% view the EU as an essential trade partner for Mexico. Quite significant is that 70.1% of people agree with the perception of the EU as a critical investor in Mexico. On the negative side, 18.3% of respondents "disagree" or "strongly disagree" with the statement that the EU is an essential source of agricultural and food products for Mexico, while 62.3% of survey participants agree with the statement “The European Union is protecting its market at the expense of others”. The 2015 report did not provide a comparative question, but a close response indicated that the Mexican public “strongly agree” and “agree” for around 70% regarding the importance of the EU as a trade partner.

FIGURE 70. EU INFLUENCE IN GLOBAL ECONOMIC AFFAIRS COMPARED WITH COUNTRIES AND INTERNATIONAL ORGANISATIONS. MEXICO



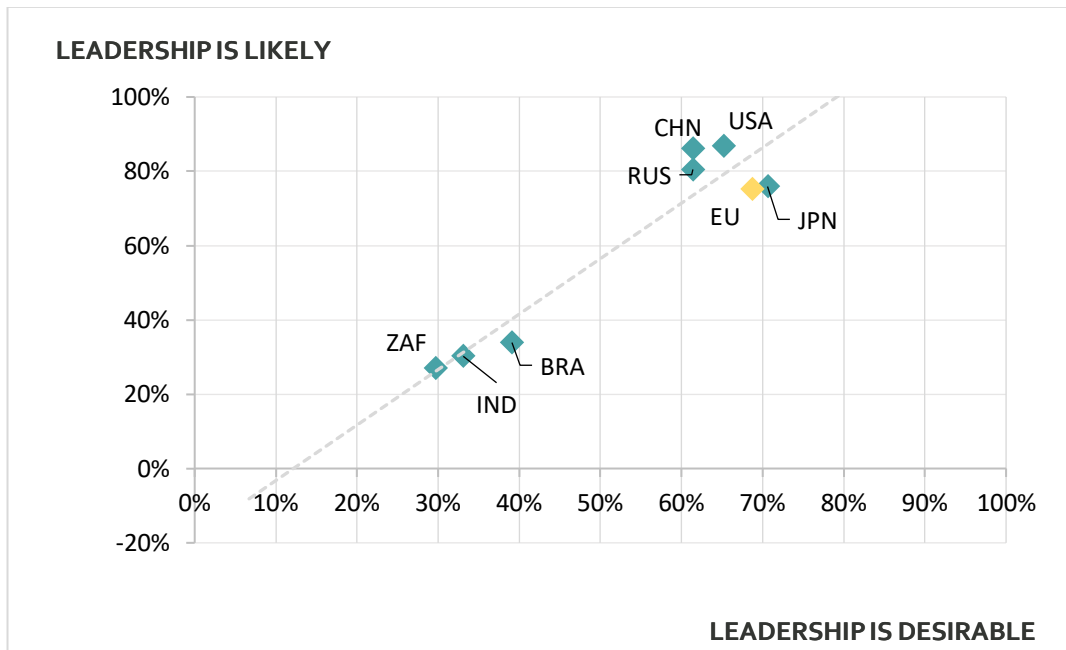
Note: based on the answers to the survey Q6: In your view, how influential, if at all, in global economic affairs are the following countries and organisations? (n=1227)

Politics

In political terms, Mexican survey respondents see the US, China, and Russia as more likely to take a strong leadership role in world affairs five years from now: approximately 80% of responses in the categories "very likely" or "somewhat likely" in contrast to around 70% for the EU and Japan. Interestingly, the Mexican public sees the EU's leadership as very desirable (68.8%), ceding only slightly to Japan (70.6%) and closely followed by the US (65.5%), China (61.4%) and Russia (61.4%). In 2015, the EU led the responses regarding the desirability of its leadership, followed closely by Japan. Regarding the likelihood of strong leadership, more than 80% of responses chose the US, while around 70% indicated the EU, closely followed by Japan and China.

Survey respondents also rank the UN (68.8%) as the key "very important" actor in maintaining global peace and stability, followed by the US (57%), China (56.4%), Russia (55%) and the EU (52.2%). The fifth place of the EU is consistent with news reports indicating the limited leverage that the EU has over Russia or China. One of the interviewees notes that while 'the EU is leading in development, in which it is quite active in the international arena', it is 'less cohesive in other areas. The more an issue has to do with national sovereignty, the higher the tension with the EU and the harder it to reach a consensus for collective action. This is the case of migration, borders and nuclear weapons'.

FIGURE 71. DESIRABILITY VS. LIKELIHOOD OF EU GLOBAL LEADERSHIP IN MEXICO COMPARED TO OTHER ACTORS. MEXICO



Note: based on Q4: How desirable is that each of the following countries and organisations take a strong leadership role in world affairs? And Q5: how likely or unlikely is it that each of the following countries and organisations will take a strong leadership role in world affairs five years from now? (n=1227) The horizontal axis presents the sum of “Very desirable” and “Somewhat desirable” responses to the Q4. The vertical access presents the sum of “Very likely” and “Rather likely” responses to Q5.

The performance of the EU is evaluated as “very good” in five areas: combating climate change and protection of the environment with 39.3% (26.4% in 2015), media freedom with 35% (29.5% in 2015), fight against terrorism and radicalisation with 30.9% (25.1% in 2015), and peacekeeping with 30.2% (25.1% in 2015). Public opinion in Mexico ranks the performance of the EU as slightly worse in dealing with refugees and displaced people (8.8% of “fairly bad” or “very bad” evaluations), supporting developing countries (6.3%) and fight against terrorism and radicalisation (5.6%). One student in the focus group finds that the dramatic images of the 2015 migration crisis have negatively affected the image of the EU. Two interviewed experts also indicate that the EU’s economic assistance allocated to Mexico has decreased after Mexico was classified as a middle-income country.

Climate and Environment

Media of both “Europe” and “EU” report on the EU in the context of climate and environment. The topics relate to pesticides and plastics in Mexico, the environmental aspects of the energy reform in Mexico, and nuclear energy policy in the UK. The Mexican public rank the UN (90.7%) as the actor that plays a “very important” or “somewhat important” role in combatting global climate change and protecting the environment, followed by the EU (89.2%), the US (85.4%) and China (84.1%). 9.4% of the respondents perceive the EU as “not important” and “not very important” in this field. When asked to evaluate the role of the above actors as “very positive” and “somehow positive” in this issue-area, the respondents rank the EU second: 86% vis-à-vis 88.2% for the UN. Other actors in this list are Japan (85.6%), and the US (79.7%). In contrast, only 10% of the respondents perceive the role of EU as “somewhat negative” and “very negative”, which is significantly lower than for India (30.8%), South Africa (34.9%), Brazil (25.3) and China (23.8%). On the EU’s performance across ten social development

indicators in the categories of “very good” and “fairly good,” EU’s climate change activism is ranked fourth (category not included in the 2015 report), only behind level of education, overall quality of life and creating employment opportunities. Focus group participants rank environment/climate change as the second most crucial theme in Mexico, and most of the interviewees also point to the relevance and leadership of the EU in climate and environmental policies: ‘the European Union privileges long term ambitious programmes such as the digital economy and the environmental economy that I think are undoubtedly the strategic borders where the European Union can guide other great players’. Another interviewee mentions that ‘there is an intense push from the EU for improving climate change policies in Mexico’.

Energy

In the press, the thematic frame of energy focuses mainly on the 2021 Mexican Electricity Bill, which triggered statements by EU Member States’ Ambassadors in Mexico regarding the potential negative effects on competition in the energy market in Mexico. Several interviewed experts indicate that one of the challenges for the EU is to close the increasing gap between the fossil fuel energy emphasis of the Administration of President Lopez Obrador and the EU’s clean energy policies. One specialist notes that ‘some initiatives from the current Mexican government, such as the energy reform, affect European investors in the renewable energy area’. In 2015, there were only two energy-related articles which discussed the Iranian nuclear deal and ethanol.

Research, Science and Technology

Overall, the thematic frame of science, research and technology is more visible in EU-related news in the press than Europe-related news. News articles are neutral and focus on technical aspects around the COVID-19 pandemic and vaccination. The EMA is one of the main actors in this thematic frame. The Mexican public ranks the EU (56.5%) fourth after China (77.2%), Japan (73%) and the US (70%) on its importance to advance to innovation and technological progress internationally. In 2015, in the field of innovation and technologies, Mexican respondents saw the EU as lagging behind Japan, the US and China. In 2021, one of the interviewees, who ranks research and technology as a driver for EU cooperation with Latin America and Mexico, indicates that ‘The European Union privileges long term ambitious programmes such as the digital economy and the environmental economy that I think are undoubtedly the strategic borders where the European Union can guide the other great players’.

Development and assistance

The issue-area of development receives limited coverage in media in the “Europe” and “EU” dataset. The references to development are linked to the EU’s role in the production and distribution of vaccines in the Global South. The Mexican public also references the US (50.5%) as a “very important actor” in providing support to developing countries to eradicate poverty – slightly higher than the EU (49.6%). In 2015, in terms of support for development countries, respondents considered the EU as a key actor, more important than the US and others, meaning that the EU has decreased its actorness in this theme since. Students in the focus group also *expect* that the EU will intensify economic cooperation and aid provision to Mexico. Some expert interviewees also mention development and one expert notes: ‘After Mexico was categorised as a medium-income country in the mid-2010s, the EU did not allocate economic resources to bilateral cooperation in Mexico. The EU’s decision has been observed in Mexico with disappointment, and there is a sense that the EU could be doing more in Mexico’.

Social

The social theme receives limited attention in traditional media. However, public opinion in Mexico perceives the performance of the EU in social development positively. The survey indicates that three areas received more than 80% of positive responses under the categories of “very good” and “fairly

good" together: Levels of education, overall quality of life, and creating employment opportunities. Climate change activism, gender equality and social justice and solidarity received around 70%. In 2015, the number of positive responses, in decreasing order, was level of education, overall quality of life, and equality between women and men (higher than 70% of positive responses), while social justice and solidarity, and creating employment opportunities were between 60 and 70%. The four social development indicators that are ranked lower in the perceptions of the Mexican public are on the protection of minorities (63.9%), eradication of poverty (63.7%), and integration of migrants and refugees (59.3%). In the case of the focus group, the participants acknowledge the benefits of the EU's social model but also seem to be aware of the EU's economic (inequality) as well as more recent political (Brexit) and social challenges (migration and refugees).

Culture

In the traditional press, the thematic frame of culture is more visible in Europe-related news than EU-related news. In the case of public opinion, 90.5% of respondents find the EU "very attractive" or "somewhat attractive", second after Japan (92.7%), which is similar to the 2015 Study findings. On the public perception of the EU in various fields of culture and sports, the main areas that rank high are monuments and museums (53.9%), history (52.5%), arts (51.4%), modern architecture and design (50%), and lifestyle (47.8%). In the public opinion survey, no specific questions relate to culture and sports, but two areas could be associated with culture in a broader sense: entertainment and media and publishing industries. Positive perceptions of the survey respondents refer to the EU's entertainment industry ("very good" - 32.7%, and "fairly good" - 37.6%) as well as media and publishing ("very good" - 36.5%, and "fairly good" - 39.7%). The survey respondents associate culture and sports with Europe (43%), the EU (32.2%) and individual European counties (17.3%). Participants in the focus group mention the cultural heritage of Europe as a defining feature. As one of the interviewees says: 'Europe has undoubtedly defined the greatest concepts of our Western culture, including that of the United States itself in many senses and of Latin America and other parts of the world'.

Health

In the traditional media analysis, due to the COVID-19 pandemic, the six newspapers in Mexico publish the most significant number of articles on health-related issues for both the "EU" and "Europe" dataset. In the 2015 Study, health was not a separate thematic frame. EU policies that address COVID and vaccine exports to Mexico dominate the debate in the sample. The EMA is the most visible EU institution. In the public opinion survey, perceptions of the EU's Global Health activities are seen rather positive ("very good" - 43.5%, and "fairly good" - 36.2%), while 15% of respondents do not provide either a good or bad evaluation, 1.7% "do not know or cannot answer", and only 3.6% see this issue-area in a negative way. The focus group participants rank health as the fourth most important theme in EU policies in Mexico. One of the interviewees says: 'After several adjustments and disagreements, both parties were able to cooperate in the provision of vaccinations'.

Continuity and change behind actorness

The *regional* and *global* contexts in 2021 have influenced the perceptions of EU actions and capacity to shape the events. The global pandemic has been the gravitational force of EU activities during 2020-2021 attracting the largest share of reporting in social and traditional media. This stands in contrast to 2015, when politics dominated media debates around the migration crisis and the prospects of Brexit, followed by the economy, which covered the economic crisis in Greece and its effects in Europe.

Contrary to traditional and social media, where the theme of health has extensive coverage, the role of the global pandemic is implicit in the public opinion survey, the youth focus group, and the interviews with experts. When asked to rank EU priority areas for cooperation with Mexico, the expert

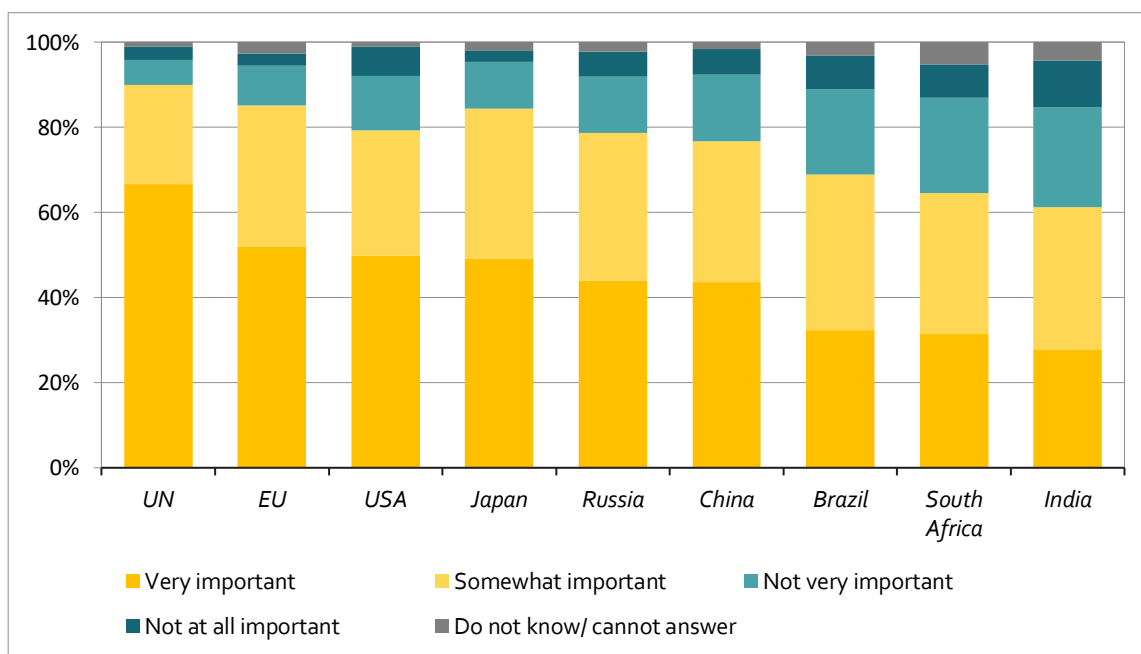
interviewees place environment/climate change, energy, economy/trade and development as top priorities. The EU's role in environmental and energy policies remains strong since 2015 – second only to the UN in the eyes of the Mexican public. Differently to 2015, the context has changed, however. One of the main concerns of youth (focus group) and interviewees is the increasing gap between the EU's attempt to promote clean energy policies as part of its climate and environmental agenda and the resistance faced by the Administration of President Lopez Obrador which relies on fossil fuel in its energy mix.

Following the same trend of the 2015 report, traditional media coverage of the thematic frames of research, science and technology, and culture is more limited in the “EU” than in the “Europe” sample. In advancing innovation and technological progress, the Mexican public sees the EU as lagging Japan, the US and China both in 2015 and 2021; the only difference is that Russia has slightly surpassed the EU in 2021.

1.8.4. The EU as a norm-setter

The 2015 Baseline Study found that Mexico perceived the EU as a normative actor. This perception remains intact. Mexican public assign the EU with a prominent role in promoting human rights worldwide. The EU (85.2%) is second only to the UN (89.9%) and is slightly ahead of Japan (74.4%) and the US (79.3%).

FIGURE 72. PERCEPTION OF THE IMPORTANCE OF EU, OTHER ORGANISATIONS AND COUNTRIES IN GLOBAL HUMAN RIGHTS PROMOTION. MEXICO



Note: based on Q11: In your view, how important, if at all, 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? (n=1227)

The Mexican public also considers the EU and Mexico to be like-minded in terms of norms such as democracy with 78% (65.9% in 2015) and gender equality with 80.4% (70.6% in 2015). More than half of survey respondents in Mexico “strongly agree” or “agree” with the statement that Mexico and the EU share the same democratic principles with 51.6% (44.8% in 2015). However, the share of those who “disagree” or “strongly disagree” with this statement is also high with 13.7% (20.5% in 2015). The

Mexican public finds five values in their views that are "definitely similar" or "less similar" with the respective views of the EU: liberty with 86.9% (73.1% in 2015), respect for human dignity (84% and 70.2% in 2015), respect for human rights with 82.9% (71.8% in 2015), solidarity with 82.9% (72.9% in 2015), and non-discrimination with 76.9% (67.8% in 2015). Survey respondents also see four values as "not very similar" and "not at all similar": justice with 22.2% (28.1% in 2015), non-discrimination with 20.5% (26.5% in 2015), and equality with 19.4% (23.6% in 2015).

Some interviewees believe that political polarisation in Mexico and the relative erosion of democracy has created a gap between Mexico and the EU in their views of democratic principles. Here, the EU is seen as an example to follow. More than two-thirds (76.5%) of people surveyed believe that the EU is an excellent example for Mexico in promoting gender equality. This trend in public opinion is reflected among focus group participants and several interviewees who recognise the EU through the Spotlight Initiative in Mexico.

In media, however, the articles framing the EU as normative power across different themes are mainly limited to health (*EU-specific*) and external relations (*the EU in third countries*). The EU's ban on vaccine exports is framed negatively and perceived as a sign of erosion of the EU's normative power. In contrast, EU statements and actions regarding human rights violations in Bolivia, Honduras, Russia, Turkey and China have reinforced the perception of the EU as a normative power in local media. *La Jornada*, closely followed by *El Financiero*, published more articles with normative discussions. Media convey the message of the EU's affinity to Mexico's values and norms in neutral-to-positive terms. It follows that the normative framing of the EU is more visible in 2021 than it was in 2015, when normative articles were mainly focused on politics or social/ cultural, and on issues of peace, rule of law and human rights.

Continuity and change behind the perception of EU as a norm-setter

The EU is seen as continuing the projection of its norms which are shared by and embraced in Mexico. Overall, positive perceptions about the EU's normative role in Mexico are based on historical and geopolitical factors such as the EU's perception as a like-minded partner in international affairs, an alternative model to the dominant role of the US in the region and a normative model in democracy, human rights and environmental protection. While the perceptions of the EU as a norm-setter remain robust, the impact of the 2015 migration crisis and Brexit still resonates negatively in the EU's perceptions in 2021. Youth and experts have mentioned these events in their interviews. One Mexican policy-maker comments: 'I would agree that the European Union is an international leader, but it seems to me that it has lost a lot of political weight. Domestic processes in the European Union have prevented it from having a much more constant presence in different areas of the planet, and Latin America is one of them' (MEX11POL). A member of the academia makes a similar argument: 'While the EU remains a model of cooperation and integration, it is frequently overwhelmed with conflict and crises'.

1.8.5. Continuity and change

Three main drivers of continuity and change shape EU perceptions in Mexico.

First, processes taking place within the EU (*EU-specific*) and its capacity to manage them. The Mexican public reacts to and observes the performance of the EU when it is challenged by migration, economic crises, contestation of the EU's integration process and the rise of nationalist parties. These events not only received negative evaluation and dominated the debate in traditional and social media in 2015 but they also remain visible in the interviews conducted in 2021. One of the students in the focus group indicates that the institutional model of the EU 'that we used to know' as a centrepiece of progress 'is no longer there'.

Second, the capacity of the EU to shape the immediate neighbourhood and global developments (*global factors*) represents another crucial factor in its image. Performance and expectations are the two

elements that drive the perception of the international role of the EU: while the Mexican public thinks that the US, China and Russia will likely be global leaders, it also feels that it would be more desirable for the EU to be one. One of the interviewees indicates the 'EU is still an economic giant, but a political dwarf in the global arena'.

Third, the evolution of the EU-Mexico agenda also shapes the perceptions of the EU in Mexico. While both parties started and concluded the negotiations for the Modernisation of the Global Agreement in the past five years – a milestone in their bilateral relations – this milestone is barely mentioned in traditional and social media news. Instead, media and experts focus on the relative distancing in the EU-Mexico relationship given the differences in the approaches by the EU and the Administration of Lopez Obrador to energy and competition policies.

1.8.6. Recommendations for EU public diplomacy

The experiences in EU public diplomacy in Mexico is an asset for improving the planning of initiatives. Short-term suggestions (mainly associated to EU public diplomacy practice and operational level) can be implemented by the EU Delegation, while medium- to long-term steps (mainly associated to reorganization of priorities) will demand more time to be implemented as they require more involvement and likely additional funding of the EEAS and other EU institutions.

Other important variables in the planning of EU public diplomacy in Mexico include the demographic structure in Mexico, the increasing decentralization of activities and the role of technology. Based on the 2020 Census, the Mexican population has grown slightly older (from 22 years old in 2000 to 29 in 2020). The population is also better educated and more connected to the internet. These are the trends that the public diplomacy strategy in Mexico needs to factor in when planning policies and outreach.

Mexico has been a centralized country and still today Mexico City is the most significant political and economic gravitational centre, but not the only one. The potential for enhancing economic, political, and cultural partnerships with local communities in Guadalajara, Monterrey and Tijuana demands a more consistent and permanent presence of the EU. The adaptation to new technologies remains crucial to reach wider audiences. From the increasing use of virtual platforms during the pandemic to utilising social media for external communication, the EU Delegation to Mexico has adapted to the use of new technologies with the implementation of activities mainly covering the themes of education, cooperation, trade, civil society and human rights.

The review of the activities of the EU Delegation to Mexico provides information about the numerous activities that EU practitioners implement in Mexico. The 2015 report has also identified five core recommendations, for the EU Delegation to Mexico that have been followed in the past five years. However, some of the experts interviewed think that the EU's visibility in Mexico is still minimal and hardly resonates with anyone beyond key audiences. The 2015 and the current reports also highlight how the EU's visibility is hindered by the significant presence of the US in Mexico. Against this background, public diplomacy initiatives in Mexico can enhance their effects by focusing on specific policy recommendations, conducting periodic analysis about the impact of EU public diplomacy actions, and examining the perceptions of the EU in Mexico on the ongoing basis.

While policies are primarily decided in Brussels, the input of the EU Delegation to Mexico can produce a virtuous circle that also supports public diplomacy initiatives in Mexico. Practice recommendations are more focused on the role of the EU Delegation to Mexico in the "process" promoting the visibility of the EU in Mexico.

In addition to the thematic priority areas discussed below (which have changed since 2015), this report also finds and highlights that public diplomacy efforts can be enhanced by (1) **Improved coordination with other actors**, especially Embassies of EU Member States and international partners to develop an

effective networked public diplomacy and to enhance triangular and quadrangular practices of cooperation/public diplomacy with Central America; (2) **Outreach to new audiences**, by identifying and developing a roadmap to reach audiences beyond existing networks, especially by facilitating formats that “listen” to more critical audiences; (3) **Enhance the effectiveness of public diplomacy** by developing methods and periodic reviews in addition to continuous information and evaluation of initiatives to shape activities that work, abandon strategies of zero impact, and innovate with the implementation of new public diplomacy actions; (4) **Explore the possibility of regional EU Delegation offices** (Guadalajara, Tijuana, Monterrey and Cancun) to respond to the decentralization of political and economic activities in Mexico and to better understand local politics in Mexico and the avenues of direct communication with local actors by developing a multi-year roadmap for opening the new offices, including training for new EU officials in Mexico in sensitive cultural areas; and (5) **Build a regional public diplomacy strategy in Latin America** by establishing mechanisms to learn from public diplomacy experiences from EU delegations in the region, enhance cross-country messaging and effectively cooperate on areas of regional relevance.

In addition to these overarching considerations, we recommend a thematic public diplomacy focus as suggested below:

Theme: Environment and climate change

Environment and climate change are core future public diplomacy areas and speak to a range of target audiences including youth and businesses. This theme lends itself to both short-term and medium- to long-term suggestions.

Policy aims

- Maintain connections between like-minded groups in the EU and Latin American countries;
- Reinforce good environmental practices, climate and environmental policy and processes learn from Mexican environmental experiences to form a constructive climate dialogue;
- Demonstrate EU leadership in this area and support Mexico to accelerate its energy transition and climate ambition.

Medium- to long-term steps

- Shape the narrative on the economic potential of climate change policies, clean energy and environment among a broad group of audiences;
- Appeal to regional leadership potential and reverse the return to fossil fuel investments;
- Increase awareness and discussions on climate risk, climate vulnerability and climate resilience;
- Support and cooperate on Mexico’s green, inclusive and rapid economic recovery;
- Support Mexico’s regulatory and policy framework to accelerate fossil fuel divestment and phase out and consider supporting mechanisms to help fossil fuel retirement, de-risk renewable energy investment and support best practice sharing on avoiding stranded assets;
- Map and coordinate ongoing climate and environmental projects carried out by development partners to avoid duplication and establish the EU as a coordinating partner that adds value to a particularly complex landscape especially where Mexican capacity in government might be stretched;

- Provide a more permanent support (political, technical, economic) to climate, environmental and climate vulnerable civil society organizations in the country. Draw on EU Member State cultural institutes to increase outreach and audiences;
- Develop a clear and consistent narrative, supported by domestic ambition and action, on the EU's commitment to net zero and the Green Deal and weave it into public diplomacy efforts of the EU Delegation and Member States;
- Connect to other EU Delegations in the region and establish cross-country/regional public diplomacy initiatives to support regional leadership and increase pressure on regional laggards. Promote the financial support available.

Short-term practice-oriented suggestions

- Continue the dialogue to reaffirm the position of the EU regarding the electricity reform bill and the focus on fossil fuels of the administration of President Lopez Obrador (2018-2024);
- Publicise the leadership in climate and environmental of the EU, a green recovery and the technology used to produce clean energy (high schools, academic groups, local governments);
- Organise workshops for Innovation, Good Practices and Shared Experiences in environmental mitigation;
- Review of the 'The Annual Action Plan for Joint Public Diplomacy' and Provision of Innovations to collaborate with other international organisations in Mexico and to mainstream climate and environment in the action plan;
- Develop and identify a roadmap of international actors in Mexico implementing similar public diplomacy activities as well as map the ongoing activities and projects of EU Member States and other international actors in this space in Mexico;
- Build network of and support climate and environmental NGOs ;
- Hold frequent investor roundtables with investors, government, and development banks to identify opportunities for Mexico to access larger international finance to support its decarbonisation, smart power transmission and distribution infrastructure.

Whom to involve from key audiences

EU Delegation, EEAS, Ministry of Environmental Affairs, Ministry of Energy and environmental NGOs, Academia, think tanks; businesses, public and private investors, EU Member State Embassies, EU cultural institutes.

Theme: Economy and Trade

Trade is one of the driving forces of the EU-Mexico relationship and both parties have worked to improve it.

Policy aims

- Promote trade and investment in the context of the modernised agreement;
- Support the competitiveness of EU companies in the world.

Medium to Long Term

- Reinforce European economic presence in Mexico;

- Open ad EU Trade and Investment Promotion Office in Mexico.

Short-term practice-oriented suggestion

- Reinforce the visibility of bilateral frameworks for economic cooperation;
- Continue with the roadshows on the Modernisation of the Global Agreement;
- Conduct sectoral dialogues with key sectors and lead stakeholders also regionally.

Whom to involve from key audiences

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

Theme: Politics

Political collaboration between the EU and Mexico opens the opportunity for the EU to reduce the gap between the self-assigned image of a normative power and political practices. This theme lends itself to both short-term and medium- to long-term suggestions.

Policy aims

- Reinforce the common positions and strategies between the EU and Mexico in international organizations.

Medium- to long-term steps

- Expand the collaboration for a multilateral agenda;
- Creation of a European and Mexican Observatory (group of experts working together) for the Study of the Rule of Law in Mexico and the EU.

Short-term practice-oriented suggestions

- Continue political sectoral dialogues;
- Collaborate with institutions promoting democracy through events and discussion;
- Initiate project-based collaboration projects among a variety of stakeholders and improve messaging through influencers and social media channels;
- Increase university presence and host workshops on democratic participation. Include EU Member State cultural institutes, EU Member State Embassies and civil society actors in the development and planning of workshops.

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.

Theme: Human rights/freedom of expression

Human rights is one of the most significant weaknesses in the Mexican political system and the EU can contribute to improving human rights practices in Mexico.

Policy aims

- Develop a common EU-Mexico narrative and agenda on human rights;
- Support to improve and strengthen human rights in Mexico.

Medium- to long-term steps

- Promote the understanding of human rights practices in Mexico and the EU
- Provision of funding to human rights advocates and creation of a European and Mexican Observatory (group of experts working together) for the Study of Human Rights in Mexico and the EU.

Short-term practice-oriented suggestions

- Increase and continue collaboration with human rights advocates in Mexico;
- Continue the dialogue with human rights advocates and Mexican government;
- Continue with the press releases regarding the assassination of human rights advocates;
- Collect information about the activities of the most important human rights advocates to determine potential support;
- Promote the observation of and attention to the human rights situation in the EU from the perspective of Mexican NGOs;
- Coordinate and collaborate with civil society on human rights advocacy projects including regular EU-Mexican exchange platforms;
- Identify “spotlight” projects and implement a series of such projects in close coordination with a strategic communications plan around this. Involve influencers and human rights advocates.

Whom to involve from key audiences

Mexican and EU NGOs; 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 State Embassies and Cultural Institutes.

Theme: Culture/education

While European culture and education are significant elements of the EU's agenda, its visibility is still limited.

Policy aim

- Improve the communication with communities that are aware of the EU role in education;
- Expand the potential of education as a platform for increasing awareness about the EU.

Medium- to long-term steps

- Collaboration of the Center for European Scholarships Network with other international actors in Mexico;
- Launch a European Network of Education in Mexico.
- Advance regional educational dialogues and develop dialogue formats that serve as a “critical friend” or advisory group to support the EU's education efforts in Mexico.

Short-term practice-oriented suggestions

- Continue with the implementation of the Erasmus alumni network;

- Open a section for advising upon strategies for EU scholarships applications.

Whom to involve from key audiences

EU Delegation and alumni; EU Delegation; Erasmus Program; EU Member States' International Education Agencies; Practitioners from EU Delegations and Mexican universities.

1.9. Nigeria

This Country Chapter presents a synthesis of the Nigeria-specific findings of traditional and social media analysis; interviews, focus groups and public opinion poll that were all conducted in the framework of this study. The Chapter follows the logic of the research design of the study at hand. We present the main findings for Nigeria according to the research criteria applied – namely visibility; actorness and local resonance; and norm-setting. Moreover, in the section on actorness and local resonance, we discuss these according to the themes analysed in this study: economy and trade; political issues; development; social issues; environment; energy; science, research and technology; culture; education; health (new perspective). The final section before policy recommendations looks at the local conditions that explain the perception of the EU in Nigeria. We conclude the chapter with recommendations for the EU's public diplomacy in 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 respondent were keen for it to carry out more humanitarian assistance.

1.9.1. Sample

Public opinion

The online survey was coordinated and conducted by PPMI through an online panel provided by Syno International. The respondents in Nigeria were surveyed in English. Data collection took place from 28 April to 16 May 2021. The sampling for the survey was designed to be nationally representative by age

and gender. Respondent profiles in Nigeria were established based on data extracted from the WB World Development Indicators database³¹. The survey covered a total sample of 1012 individuals aged between 15 and 64 years old³².

Media

The quantitative part evaluating the general trends in a large press media sample was carried out by PPMI. Four popular prestigious dailies *This Day*; *Vanguard*; *Daily Trust*, *The Sun* and two business dailies *The Guardian* and *Business Day* were monitored from 1 February to 30 April 2021. The *Factiva* repository was used to aggregate content from both licensed and free sources, and in-house data processing was applied to produce the results.

Two separate datasets in English language were collected over the period of observation – «EU» (575 articles) and «Europe» (1641 articles). Search terms for the dataset “EU” are: “European Union”, “EU”, “European Commission”, “European Parliament”, “Court of Justice of the European Union”, “EU presidency”, “EU Council”, “European Council”, “Council of the European Union”, “Eurozone”, “European Central Bank”, “European Investment Bank”, “European Medicines Agency”. The search terms for the dataset “Europe” are “Europe”, “European” and “Europeans”. The search terms for “EU” and “Europe” datasets consider both plural and singular forms as well as possible grammatical forms of the search terms in the local language. Europe dataset excludes articles containing any of the “EU” dataset keywords.

The qualitative media content analysis was designed, supervised, and coordinated by experts from Public Diplomacy and Political Communication Forum (PD-PCF), University of Canterbury (UC), New Zealand, and conducted by local researchers trained by the PD-PCF. PPMI collected the media sample (48 articles) using the search engine from two prestigious newspapers *This Day* and *Vanguard* and one business newspaper *The Guardian* for country experts for in depth qualitative analysis. The exact timeframe of observation remained the same. Experts analysed the EU image created by applying elements of content, cognitive and critical discourse analyses.

Social media

PPMI carried out the social media analysis. The data collection process was automated using the online social media monitoring tool *Mediatoolkit*. Social media posts were collected from Twitter, Facebook and Instagram with the use of automated queries. Coverage of the EU was traced using a set of the EU-related keywords: “European Union”, “EU”, “European Commission”, “European Parliament”, “Court of Justice of the European Union”, “CJEU”, “EU presidency”, “EU Council”, “Council of the European Union”, “European Council”, “Eurozone”, “European Central Bank”, “European Investment Bank”, “European Medicines Agency”. All the keywords were additionally traced in one-word format to capture related hashtags: europeanunion, europeancomission, europeanparliament, courtofjusticeoftheeuropeanunion, eupresidency, eucouncil, europeancouncil, counciloftheeuropeanunion, europeancentralbank, europeaninvestmentbank, europeanmedicinesagency. Europe-specific keywords used for filtering relevant social media posts are “Europe” and “European”. Europe dataset excludes posts containing any of the “EU” dataset keywords. Additionally, a location filter was used to ensure that the collected mentions originate from Nigeria. A language filter was set up to collect posts only in English, the official language in Nigeria.

³¹ WB World Development Indicators database: <https://databank.worldbank.org/source/world-development-indicators>

³² Detailed public opinion survey data are available in Annex II of this Report – Comparative public opinion survey report.

The resulting sample of Nigerian social media posts collected from 1 February to 30 April 2021 includes 62697 mentions, of which 11941 are of the EU and 50756 of Europe.

Working with social media platforms, the Project Team followed each platform's terms of use. All identifiable information of individuals from social media data remains confidential and is removed before the publication of findings. Computational analyses of the samples involve only contents from media databases' public websites – posts that are available to general audiences. No generalised conclusions that might cause any potential harm to identifiable communities are drawn from social media analysis.

Interviews and focus groups

Interviews with local opinion- and decision-makers as well as focus groups with students were conducted by the Country Experts, with training support and supervision from PD-PCF, UC, following the approval of the UC Human Ethics Committee. As part of this study, interviews and focus groups aim to provide in-depth explanations about Nigerian perceptions of Europe and the EU and cross-reference the findings from the public opinion survey, traditional and social media analyses.

Focus group participants were represented by university students at Babcock University aged between 18 and 20 years old, including five male and four female students across five subject areas (mass communication, computer science, economics, international law & political science, and history & international Studies). Majority of the participants have never been to Europe, though a couple have family in the UK. For most, perceptions of the EU come from media and their own research linked to university studies. Additionally, 12 opinion makers representing various positions within Nigeria's public sphere were interviewed. Each of the interviewees holds at least one professional degree. Eight of the interviewees are male. The group includes two think tank representatives; two politicians; two journalists; one academic; two businesspeople and two cultural influencers. The age range of interviews is between mid-20s and mid-60s. Data collection took place between 21 May and 2 July 2021.

1.9.2. Visibility

Survey findings show that the EU has relatively high visibility and consideration (the same as South Africa) in Nigeria. Over 99% of respondents have an opinion about the EU together with the host international organizations and countries, including China, the United States and United Nations, World Bank, Japan Brazil. The organizations of which the respondents in Nigeria report less knowledge are the regional cooperation organizations Association of Southeast Asian Nations (ASEAN), MERCOSUR, United States-Mexico-Canada Agreement (USMCA) (between 5.75% and 8.3% of respondents declare no knowledge of them) and NATO (3.25%).

The EU also has a positive public image in Nigerian society. When assessing attributes associated with the EU, more than half of survey respondents (64,8%) consider the EU to be modern (the attribute selected by the biggest number of respondents with regards to EU), though it fares less well than the US (79,1%), and Japan (71,7%). Nigerian public opinion considers the EU to be the most peaceful of all comparators. Fifty-five per cent of Nigerian respondents consider the EU peaceful (the EU is followed by Japan 49,3% and Brazil 48,8%) and less hypocritical than others (only 4% believe the EU to be as such), with only Japan faring better (3,5%). The EU is also seen as less arrogant than most, with only 3,7% of respondents who say the EU is arrogant while 4,4 % think the EU is aggressive lower than other countries in the sample. While the EU is considered trustworthy compared to most except for Japan, only 31,7% consider it so. In general, the view of the EU relative to others is positive; in absolute terms, however, most respondents believe the EU to be untrustworthy and not as multicultural, though more united than any of the other countries compared.

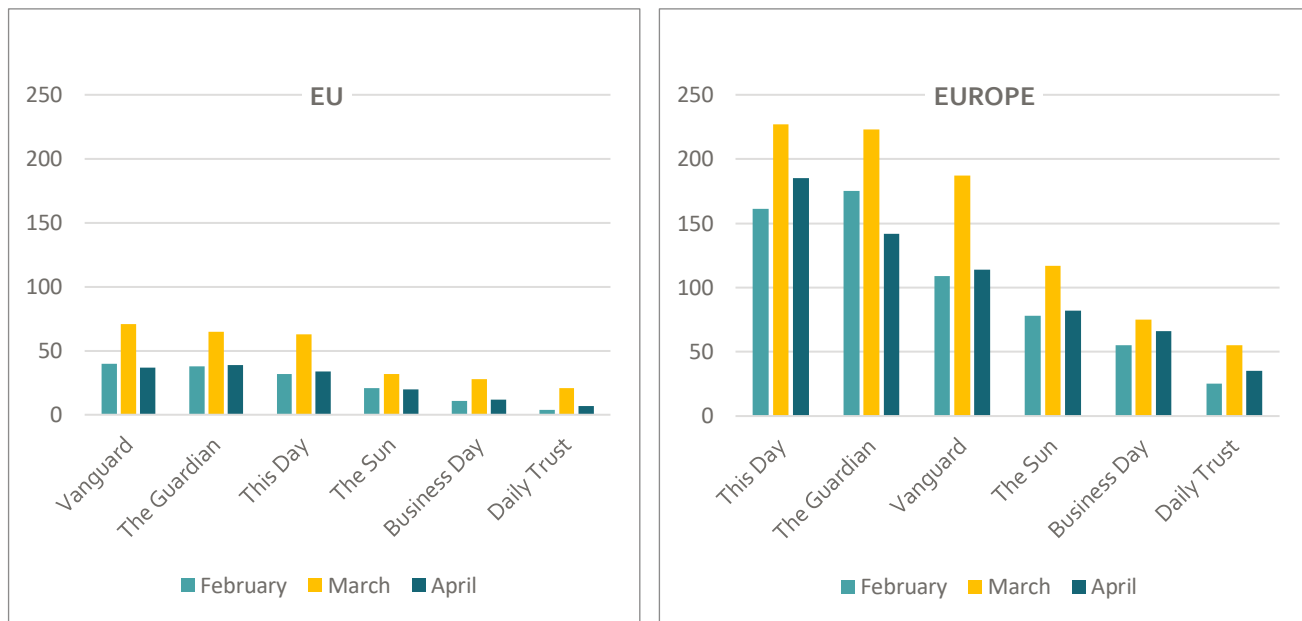
The EU is considered Modern, Peaceful, Efficient, Strong and less than half of the respondents consider the EU United, it still has the highest ranking. Other countries fair mainly well though US, China, Russia, India and South are not seen as peaceful, while Brazil, India and South Africa are not viewed as very efficient. On being modern, the US, China and Japan rank higher than the EU. The US and Russia are considered significantly stronger than the EU. All countries compared have low trustworthiness indicators though this is especially low for China and Russia.

With respect to how the EU is perceived in different domains, the public opinion polls see the EU in a very positive light including in global trade where over 90% consider the EU positively (very good or fairly good). This contrasts sharply with the general view in the focus group, where EU trade practices were viewed as unfair. With the interviews, most interviewees agree that this is an area of strength for the EU. One businessperson noted that in Nigeria and compared to the United States, “European companies are always willing to explore the imagined economy present in Africa” due to historical relations. However, some of the focus groups members did not think the EU was necessarily a fair actor. The areas of negative perceptions by public opinion are quite negligible. Those who consider EU activities as fairly bad or very bad focused on the area of tourism though this constituted only 2,3% of the sample. Those who did not know or could not answer were also very limited though the knowledge was lacking, at 3,8% in Space exploration and Technologies. The positive association is linked to the broader presence of the EU in Global Trade rather than specific practices in Nigeria or Africa more broadly.

The majority of respondents acknowledged that they heard or read about the EU at least daily with 80,5% engaging with news about the EU at least once a week. Less than 7% of respondents claimed they rarely or never read or heard of the EU. This mirrors the main attitudes of the interview respondents, though not the students focus groups whose encounters with the EU is contingent on their University courses.

Overall, *media* coverage of «Europe» was significantly higher at 79% throughout the whole period than the «EU» and its' institutions at 21%. Data shows that «EU» dataset had almost two times higher *media* visibility in March (49,7%) than in February (25,4%) or April (25,9%). Similar pattern was noticed in «Europe» dataset.

FIGURE 73. VOLUME OF NEWS ITEMS WITH A REFERENCE TO THE EU AND EUROPE IN TRADITIONAL MEDIA. NIGERIA



Note: based on automated quantitative data analysis. Includes press articles which report on the EU and Europe as a principal or secondary subject of the article.

The degree of major centrality for EU articles was low for all traditional media outlets. A low degree of centrality in quantitative analysis shows that the EU and its institutions were not profiled as the main actors in the news story. Based on the qualitative analysis of key newspapers, most of the news dealt with reporting on specific EU programmes related to sexual and gender-based violence, the EU's collaboration with ECOWAS on disarmament issues, or Team Europe's work on related to the COVID-19 pandemic. The EU features only as a major player in less 20% of the news stories across traditional media dataset.

Like media, Europe visibility in *social media* was significantly higher than that of the EU. The peak in Europe-related posts on 18 April was linked to the discussion around the creation of the European Super League. The peak in EU-related feed on 6 April was generated by retweet activities related to a tweet about Catriona Wendy Campbell Laing, High Commissioner to Nigeria. The tweets centred around criticism towards Britain for leaving the EU and promoting united Nigeria simultaneously in the context of activities of The Indigenous People of Biafra (IPOB) separatist organization.

Member States and MSs' leaders' visibility, EU institutions and EU leaders' visibility

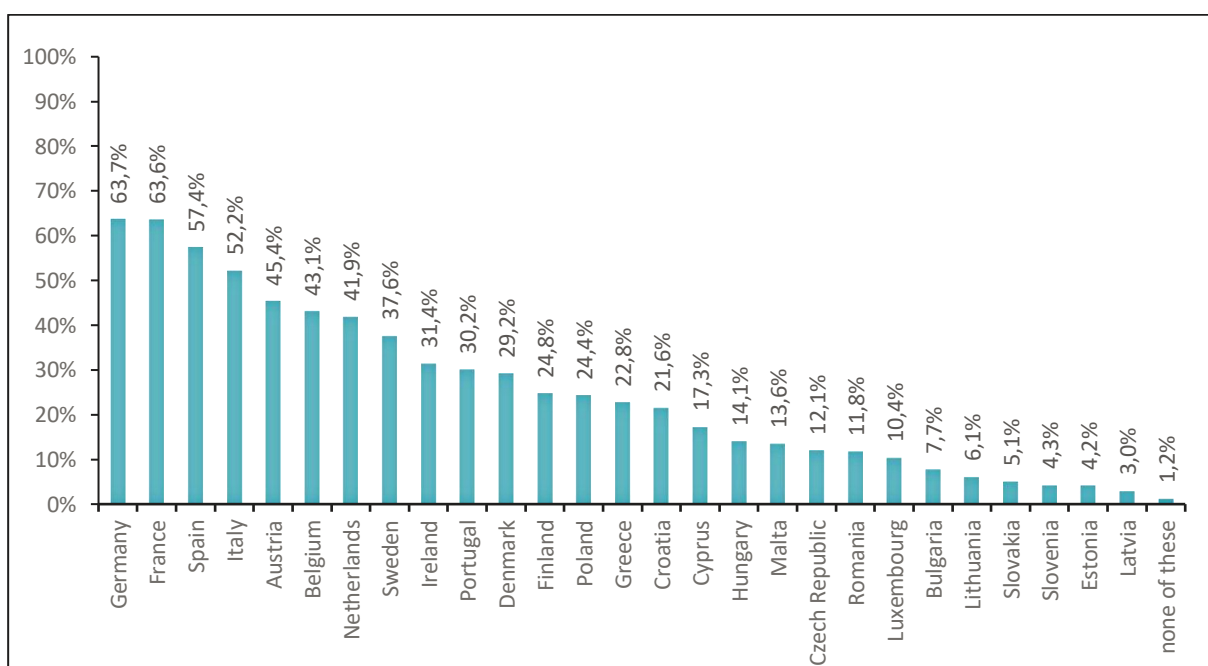
In both «EU» and «Europe» dataset among the EU institutions the European Medicines Agency was mentioned the most – 52 times in Nigerian *media*. The media paid slightly less attention to European Commission (41). A notable amount of mentions was received by European Central Bank (17), European Investment Bank (14). European Council (14) and European Parliament (10). Other EU institutions were not mentioned in the articles. Additionally, key officials that feature include Ursula von der Leyen; Charles Michel; Head of the Nigeria EUD Ketil Karlsen; Executive Director of the EMA, Emer Cooke and Commissioner for Crisis Management, Janez Lenarčič. All EU actors were especially visible with reference to COVID and vaccinations, particularly poor rollouts or delays and COVAX.

EU Member States are especially visible in the narratives around poor vaccine distribution in Europe and abroad (e.g. France, Germany, Italy, Belgium, Austria, Portugal and the Netherlands). Others MSs (Italy and Portugal) are mentioned in the context of trade and investments with Nigeria and Africa generally. Overall, the most mentioned Member States mentioned by traditional media are shown in **Error! Reference source not found.** Several countries were mentioned more often in «EU» than «Europe» news compared to other countries – Austria (48.7%) and Ireland (47.3%).

As in *media*, Germany and France are the two most mentioned Member States in Nigerian *social media* posts. Among the popular Member States were Spain, Italy, Portugal, and the Netherlands. For all Member States, most mentions stemmed from Europe-related feed.**Error! Reference source not found.**

Among the EU institutions, the European Commission received 233 mentions in Nigerian *social media*. A share of public attention was also paid to the European Medicines Agency with 190 mentions, followed by the European Central Bank (81 mentions) and the European Parliament (61 mentions). Least mentioned were the European Investment Bank (31), the European Council (24), and EEAS (15). The most attractive Member States correlate with the most popular Member States in media and social media. The findings are also like the perceived attractiveness of EU countries shown in the public opinion poll with Germany (63.7 %) mentioned as the most attractive EU country, followed closely by France (63.6 %) and Spain (57.4 %) **Error! Reference source not found.**

FIGURE 74. ATTRACTIVENESS OF THE INDIVIDUAL EU MEMBER STATES. NIGERIA



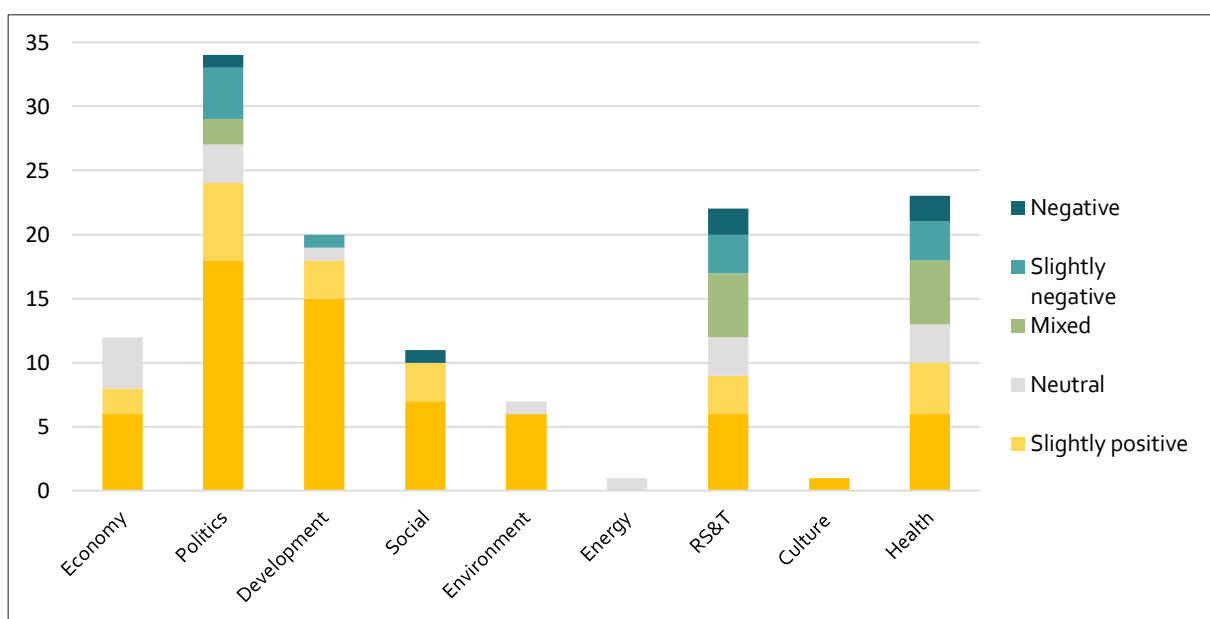
Note: based on Q25: Please indicate which European countries look the most attractive to you? Respondents could choose more than one country (n=1012). Respondents were not limited in the number of countries they could name.

Local *elites*, who are arguably better informed on the EU than the public and more engaged with the EU directly, explicated knowledge and awareness of EU actions *with* and *in* Nigeria. These perceptions are detailed below. In the context of the focus groups, though not obviously states the Commission featured the most due to its responsibility for trade and migration. Member states were hardly cited – the UK came up with respect to Brexit and in particular the negative impact Brexit has on the EU image. The interviews were more nuanced in their engagement with the EU. The EU featured initially as monolithic via the practices of the Delegation in Nigeria. However, many EU member states feature as visible in

their activities in Nigeria – much more so than the EU. For example, the role of German GIZ in technical support for development was noted by interviewees across the range of ages. Across interviewees, those who have travelled or lived in Europe have travelled to quite a few countries and this was more likely amongst those aged 30 and above. For example, only one member of the focus group had been to the UK, whereas across 12 interviewees at least 11 had been to the EU (Germany, France, Italy, UK – when it was a member). Many of these travels were related to work, holiday, or University degree programmes – one respondent was a participant in Erasmus.

Emotive charge

FIGURE 75. EMOTIVE CHARGE IN PRESS ARTICLES REPORTING ON THE EU AS A PRINCIPAL SUBJECT. NIGERIA



Note: Based on qualitative media analysis conducted by country experts. One article can reflect more than one theme.

Emotive evaluation of the EU is mixed. According to the qualitative media analysis, in some cases, the EU is framed very negatively; for example, it is considered in the context of COVID-19 to practice vaccine imperialism and in other instances to be an interfering external actor with respect to election support when such support is seen as aiding political parties. The overwhelming negative emotive language is often used with respect to the EU’s handling of vaccine distribution and COVAX. More positive descriptors of the EU view the EU as strong, accessible, cooperative, collaborative, innovative and resilient. Positive framings were related to green growth, agribusiness investment and humanitarian partnerships.

Quantitative data analysis suggests mostly neutral (mixed) and slightly positive overall evaluation of the EU in the Nigerian *media*. **Error! Reference source not found.** Although extreme evaluations were rare, it was more often positive than negative.

In *social media* emotive charge of the EU-related posts was almost evenly spread between positive (38.8%), negative (34.6%), and neutral (26.6%) **Error! Reference source not found.** Europe, in contrast, was most often presented in positive light.

Continuity and change behind visibility and emotive charge

In the context of the focus group, Brexit was very resonant due to the perceived impact it has on the EU's future stability as a regional power. Apart from Brexit's lasting implications, there is no marked sense that the EU is changing, either in Nigeria or globally. There was however a prevailing sense of the EU as a neo-colonial power, a perception shared explicitly by about almost half of the interviewees. One particularly resonant sentiment was captured in one interview in reference to the EU's relationship with Africa more broadly and Nigeria specifically: "the genesis of the relationship is an imperial legacy of extraction and subjugation" which manifests as "obvious blind spots" in the ongoing relationship with Nigeria wherein "racism is a frame" (NGMN1).

The extent of the EU's visibility in the media analysis is confirmed in the interviews – when compared to other actors including some member states, the EU is perhaps not as visible in Nigeria. While COVID dominated the news cycle, it didn't in the interviews. One interviewee did note disappointment in the EU's wealthier nations monopolising available vaccines.

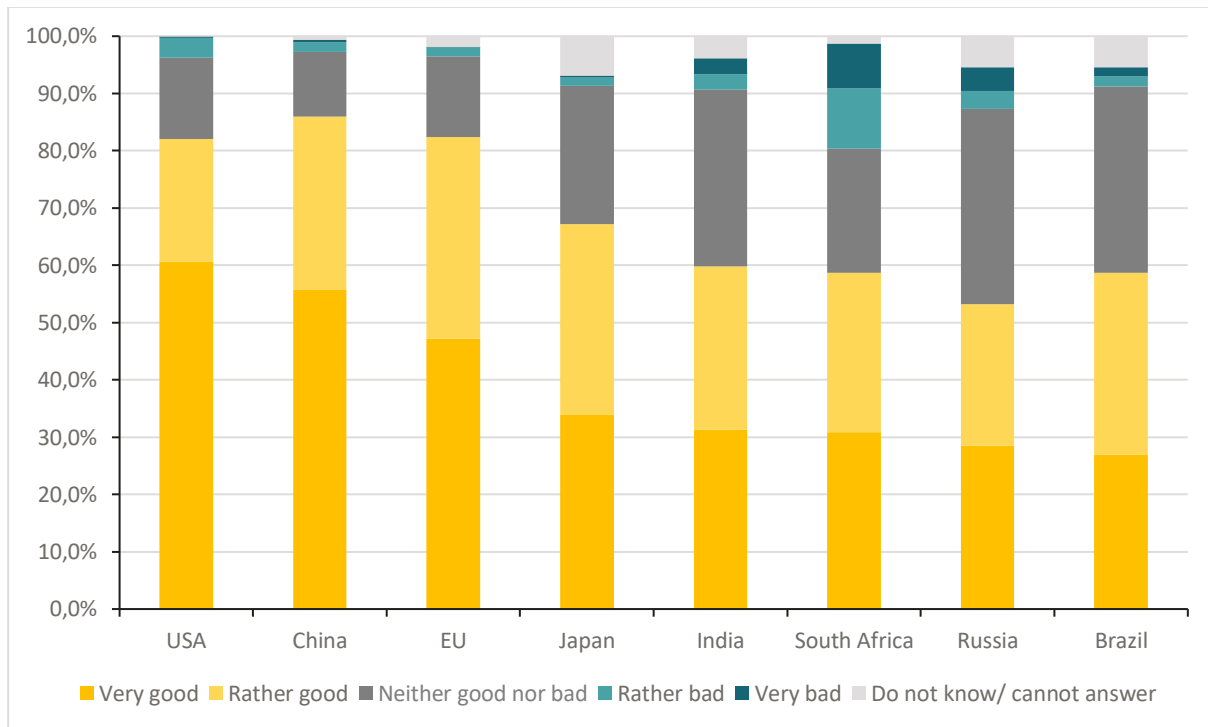
The EU was generally praised in media analysis and via interviewees for its role in promoting human rights though there is a general sense that it could "do more." The EU's role in promoting gender equality in Nigeria was also notable via the media and this came up in some interviewees due to targeted public diplomacy events that have come about by collaborating civil society organisations. There is no differentiation between the short-term and long-term perceptions of the EU.

1.9.3. Actorness and local resonance

The EU as a partner

The EU is perceived as having a good overall relationship with Nigeria though the US and China are perceived to have better. Interviews suggest that one explanation for this is that the EU's (including Member States) visibility is comparatively less to the US' activities via United States Agency for International Development (USAID), or Chinese infrastructural investment. Specifically, on the survey questions, respondents mainly agree that the EU is an important and trustworthy, including for education but a substantive majority also believe that this relationship could be stronger. A significant minority are neutral on these issues (between 9 and 15% on each indicator). With respect to the EU's role as a partner for educational exchanges, just under 3% of respondent could not answer the question or did not know.

FIGURE 76. EVALUATION OF NIGERIA RELATIONSHIP WITH THE EU AND OTHER COUNTRIES



Note: based on Q3: Which of the following words best describes your country’s overall relationship with each of the following countries and organisations? (n=1012)

Importance of the EU in selected fields

Amongst the students in the focus groups, there is a sense that knowledge of EU initiatives is limited. As one respondent notes: "If you take a survey around the whole of Nigeria, there are very few people that actually know of the EU and their influence..." (YNi3). Whereas there is a general sense that the EU including its Member States are important partners to Nigeria (some people did question what the EU wanted and wanted Nigeria to just be left alone) in areas that have been reinforced by the media analysis, there is weariness however of the EU in terms of trust when it comes to a particular and recent policy issues – migration. Personal exposure to Europe via family experiences of migration to Europe, and the difficulties around obtaining visas form key drivers of negative perceptions of the EU. The lack of access to Europe via regular travel and migration was highlighted consistently across all interviews. Being able to immigrate to the EU is viewed as a positive opportunity, but the process of doing so and possibly negative experiences of life upon arrival affect how Europe is viewed by those back home in Nigeria, including among those who have regularly come to Europe. Across different areas of foreign policy in Nigeria perceptions on the EU’s role as a partner in education – whereas some thought the EU has a role to play, most were unaware of EU programmes around education exchanges. The students in the focus groups did not feel that the EU was a strong partner in this, in contrast to the public opinion.

Most of the coverage in the sample is from local news sources. The interaction of the local “anchors” and global perspectives is especially visible on themes linked to COVID vaccines. The EU-specific stories in this context speak to the sluggishness of the vaccine roll-out (in Europe and globally) and the safety of the AstraZeneca (AZ) vaccine. COVID is often situated within a global context. In other areas such as peace and security, the stories detail the complexities of regional violence and the delivery of wider humanitarian programs. Beyond COVID, two news items capture disagreements between the EU

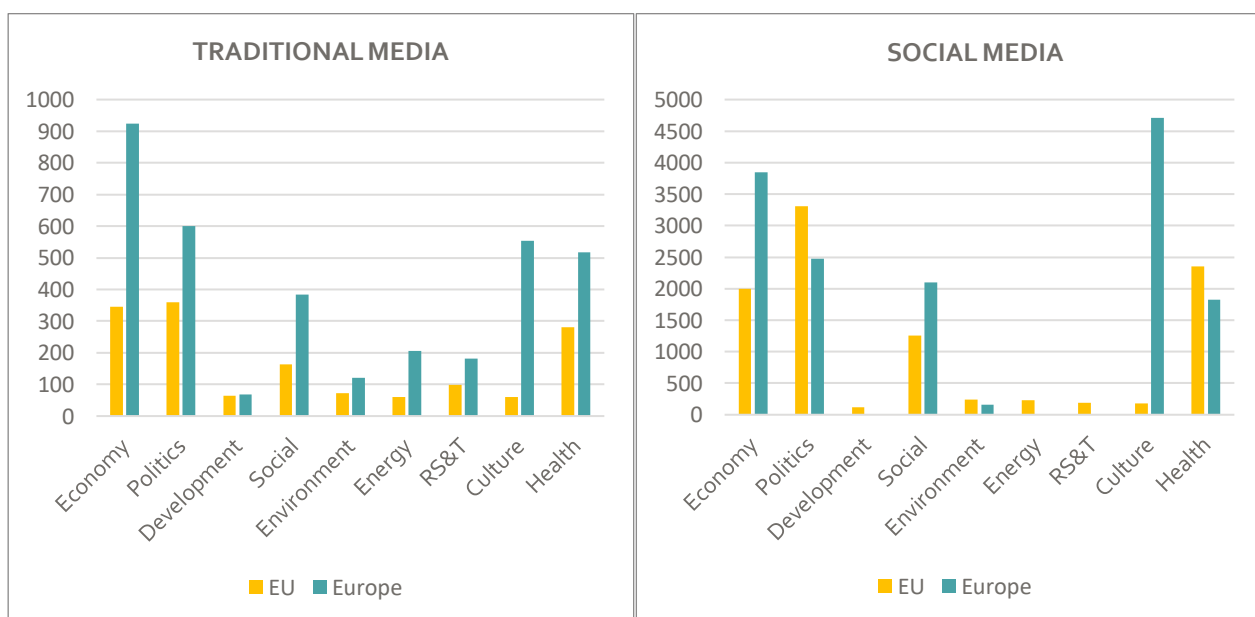
and Russia featuring EU Member States, Germany, and another news item links to EU green investments activities in East Africa. The news with the local hook were linked to the EU’s implementation of the Spotlight Initiative aimed at eliminating gendered violence globally. In this area, the EU has been quite visible in the media and in connecting with government (at national and state level) and non-governmental actors.

Most of the news articles in the *media* did not specify sources of information. The most cited international source for the «EU» news in QL dataset was *The Guardian* (62%). Less visible news agencies were *Agence France-Presse* (12%), *Bloomberg* (4%), *CNN* (4%), *Reuters* (3%), *BBC* (3%). The remaining international sources received less or no attention at all. Digging into each of the newspapers, we find that *ThisDay* focuses primarily on local and regional news while *The Guardian’s* framing tends to be interrogative and global. Much of the news that was EU specific drew from the EU’s own press releases with respect to EU programme support to sexual and gender-based violence, the EU’s collaboration with ECOWAS on disarmament issues, and EU roles within the pandemic including on COVAX and Team Europe. None of the newspapers particularly dominated though the *Vanguard* sample was the largest. The journalists were varied and diverse and consequently difficult to pin down those with Europe or EU as a regular ‘beat’.

The most often mentioned international sources of EU news in Nigerian press in QN dataset were Agence France Presse (30 references; 27% of total identified sources), The Guardian (18; 16.2%), Bloomberg (10; 9%), BBC (9; 8.1%), CNN (9; 8.1%).

In observed Nigerian *media*, the «EU» was most often mentioned regarding politics (24%), economy (23%) and health (19%). For «Europe» economy (26%), politics (17%), culture (16%) and health (15%) themes had the most coverage. Contrastingly, the «Europe» dataset had significantly higher coverage for culture theme (16%) compared to EU (4%). For both «Europe» and «EU» development was the least noticeable thematic frame with 2% coverage for «Europe» and 4% coverage for «EU». The distribution of these themes suggest that the economy and politics are the most dominant, and unsurprisingly, perhaps for the period under investigation, health also ranks highly with respect to the EU specifically.

FIGURE 77. THEMATICAL FOCUS OF SOCIAL MEDIA AND PRESS ARTICLES REPORTING ON EU AND EUROPE. NIGERIA



Note: based on automated quantitative data analysis. Includes press articles which report on the EU and Europe as a principal or a secondary subject of the article. One article can reflect more than one theme.

In Nigerian *social media* the EU was most often mentioned with regards to political issues (33.5%) and health (23.9%); a considerable share of posts contained economic (20.2%) and social (12.7%) thematic frames. Compared to the EU, Europe was mentioned much more often in connection with culture (29.7%) and economy (24.2%)

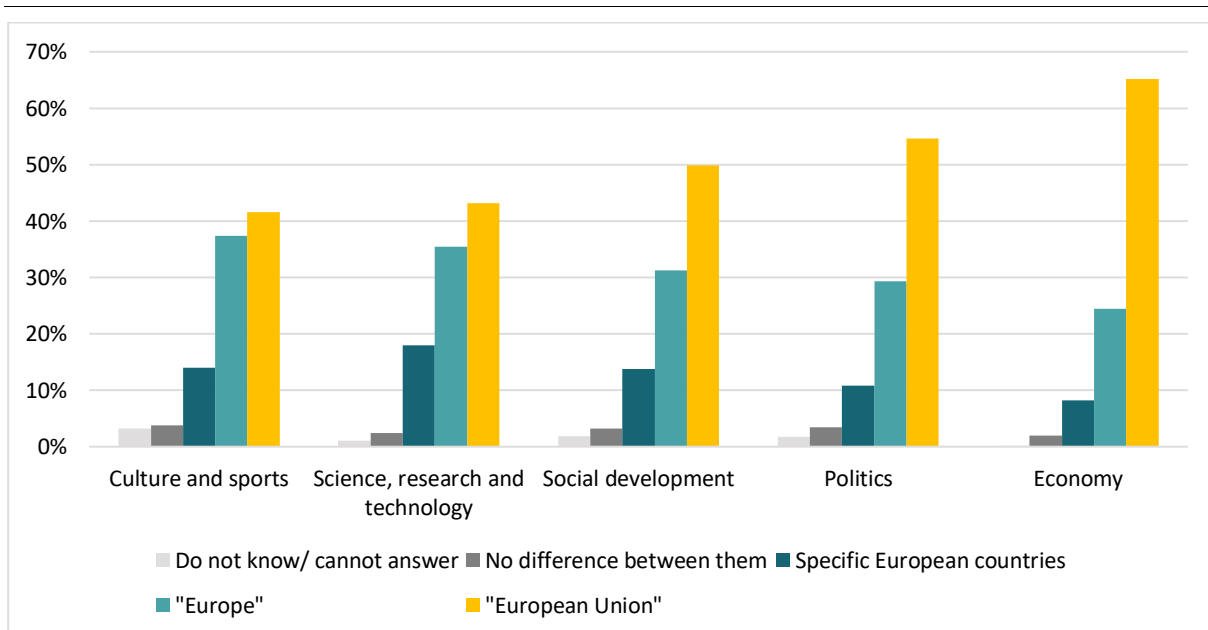
Economy and trade

In general, the economy tended to feature prominently and positively across the media and social media when EU or «Europe» are the subject of discussion. This prominence is consistent with both the focus groups and the interviews. The EU/Europe tend to feature with reference to the economy though of course officials are on hand to announce new initiatives or reflect on the scope of economic or trade relations in some cases. Most references to the economy are generic with respect to EU’s aspirations or EU engagements in Africa more broadly, where Nigeria features as part of the continental approach.

Amongst the young people who contributed to the focus group, the economy and trade featured significantly. This is an area that most respondents argue that the EU is quite strong and has significant influence. Yet, its role is not always viewed favourably. As demonstrated by the association with the emotive language – those who were neutral or negative about the EU and the economy were almost equal to those who viewed it in a positive light. One member of the focus group noted for example that “they [the EU] should be more considerate when they are making some of these [trade] policies because it doesn't just affect the European nations that are there, it affects the world at large” (YNi1). That the EU was unfair in its trade practices is a theme that also came during the interview phase and like the literature and focus groups, this was linked to perceptions about the Economic Partnership Agreements.

The EU features prominently when associated with the economy in Nigeria. Yet, the EU’s influence with respect to economic and trade issues though ranked highly (over 72%) is behind that of the US, China, the WTO and IMF in global affairs. This too matches up with the interviewees’ perceptions of the EU’s role in economic and trade issues generally.

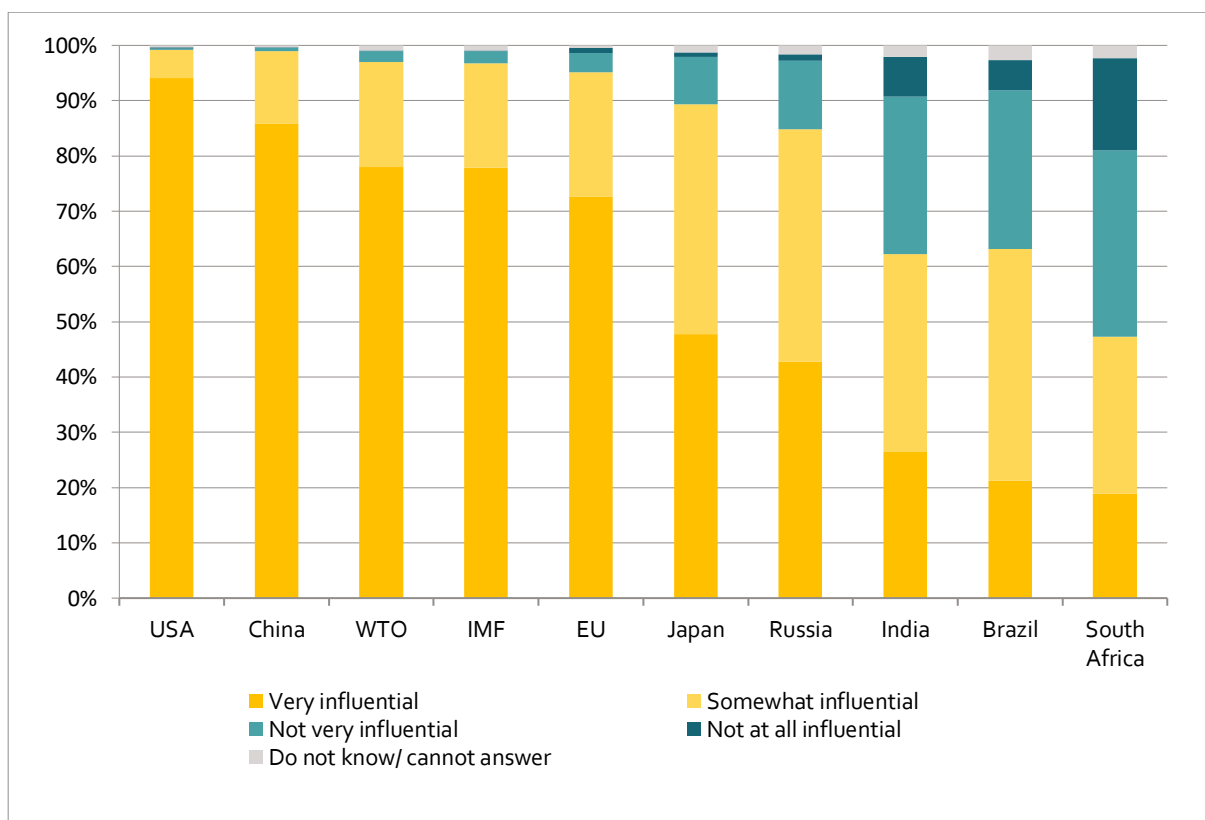
FIGURE 78. ASSOCIATION OF DIFFERENT AREAS TO THE EU VERSUS EUROPE. NIGERIA



Note: based on the answers to Q22: Some people think about Europe, whereas others think about the European Union when talking about economy, politics, culture, sports and other areas. In your case, which term – Europe or the European Union - comes to your mind first when you think about the following subjects? (n=1012)

**Please note that in 2015, this question was accompanied by a chart in a different format under the section “Research, science and technology”. The wording and answer categories used in this question have changed in 2021, making it inappropriate to conduct historical comparisons.*

FIGURE 79. EU INFLUENCE IN GLOBAL ECONOMIC AFFAIRS COMPARED WITH COUNTRIES AND INTERNATIONAL ORGANISATIONS. NIGERIA



Note: based on the answers to the survey Q6: In your view, how influential, if at all, in global economic affairs are the following countries and organisations? (n=1012)

In view of the public opinion in Nigeria the EU is an important but potentially problematic economic partner for the country. Survey results indicate that the EU is an important partner overall (86% of respondents agree with this statement). Almost 90% of respondents agree that there **should** be stronger economic ties between the EU and Nigeria. However, a strong majority (approximately 75%) of respondents agree that the EU’s stance in economic issues is mainly to protect its market at the expense of others.

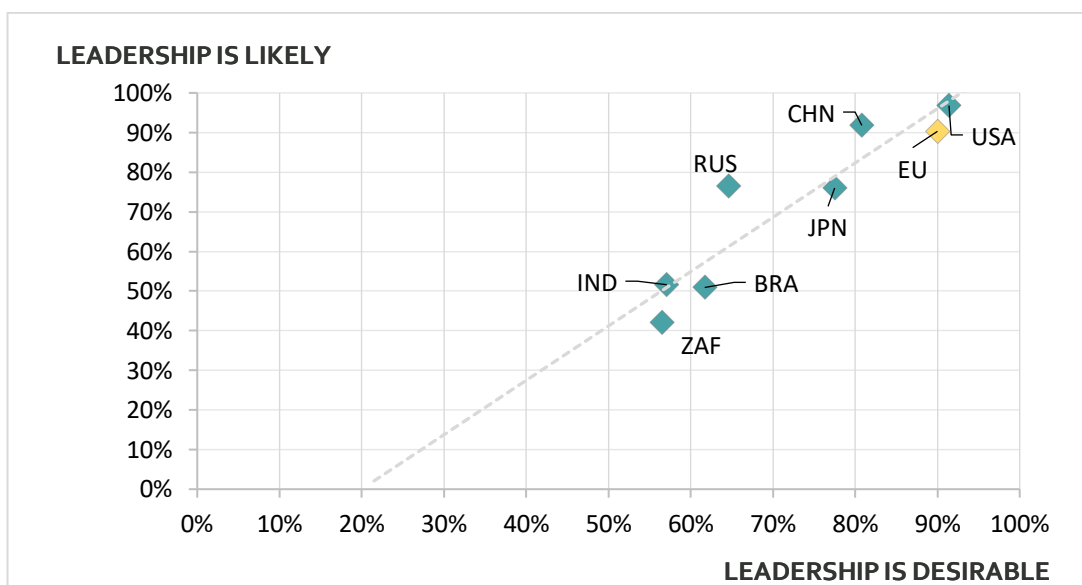
In certain spheres the share of respondents who do not share positive opinions of the EU role is significant. Fifty-one per cent of respondents agree that the EU is an important source of agricultural and food products for Nigeria, but more than 40% of respondents did not have a clear positive perception of the EU in this sphere. Some interviewees noted that the EU has been helpful in agriculture, dealing with soil erosion. A significant minority portion (18%) of respondents is either neutral or disagree that the EU’s an important foreign investor in Nigeria. During the interviews, several respondents especially questioned the advantage of such ties particularly since jobs as a benefit has not

been forthcoming for Nigerians. Taken together, with respect to the economy, whereas the EU’s importance is undoubted, though the way in which it engages in the economic sphere vis-à-vis Nigeria is questioned.

Politics

On the political issues, the qualitative media analysis indicated the EU’s support for peace and security; promotion of the rule of law; support for human rights, liberty and good governance. These themes appear in the coverage of the EU’s development and humanitarian work in Nigeria, and sub-regional organization Economic Community of West African States (ECOWAS) was favourably covered in traditional media. They are also consistent with some of the themes that emerge from the public opinion polls.

FIGURE 80. DESIRABILITY VS. LIKELIHOOD OF EU GLOBAL LEADERSHIP COMPARED TO OTHER ACTORS. NIGERIA



Note: based on Q4: How desirable is that each of the following countries and organisations take a strong leadership role in world affairs? And Q5: how likely or unlikely is it that each of the following countries and organisations will take a strong leadership role in world affairs five years from now? (n=1012) The horizontal axis presents the sum of “Very desirable” and “Somewhat desirable” responses to the Q4. The vertical access presents the sum of “Very likely” and “Rather likely” responses to Q5.

Compared to other actors’ roles in global peace and stability, while the US features most prominently, the EU is a close second with the United Nations in terms of importance. Those who thought the EU’s role was unimportant were negligible, about 3%, while only less than 1% had no response either way. There was, therefore, generally more knowledge about the EU’s roles than that of Russia’s, Brazil’s, South Africa’s and NATO’s.

According to the survey, perceptions of the EU’s role in political affairs is mainly favourable. It is nevertheless worth noting that when it comes to the EU’s role in fighting terrorism and radicalisation, over 10% were neutral, 7.5% viewed the EU’s role negatively, and over 2% did not know or could not answer. This is significant given the EU’s perceived importance in dealing with Boko Haram as addressed in the literature. Three other areas are worth mentioning: support to developing countries, dealing with refugees, and military operations – in these areas, over 10% had a neutral reaction, whereas, on peacekeeping and military operations, approximately 3% of respondents did not know

about these EU roles. The EU, however, is behind the United States and United Nations, unsurprisingly given the former ostensibly has the most powerful military in the world and the latter has primary responsibility for peace and security globally. Overall, this would suggest that based on the survey alone, the EU has a role to play in these areas, but how it plays those roles, and its broader implications is questioned by an important minority.

Among the University students who formed the focus groups, the role of the EU in humanitarian support, climate change and energy are viewed positively, and especially regarding its role as a human rights promoter and the in the realm of regional integration. In the interviews as well as the focus groups, the EU migration regime and approach was heavily criticised. One interviewee noted the EU's military role in places like Mali (and the Sahel more broadly) as being contentious in that the support was well appreciated in terms of training missions and funding but wondered what increasing military engagements mean for the support to regional integration more broadly given changes within the EU (NGTT1).

Climate and environment

The media reports tended to report positively on the environment though not necessarily in relation to Nigeria. This reporting was in relation to investments and commitments made championing green recovery in the aftermath of COVID-19, as well as articulating more environmentally friendly practices as part of foreign policy. The media assessment is more or less neutral, however.

Public opinion shows that the EU is perceived as important in the fight against climate change, and its actions are viewed positively. This is important since some other actors were seen as important to the fight but not viewed very positively, e.g. China. The survey asks about the EU's role globally, so it may not be captured fully in relation to Nigeria. Nevertheless, the EU's role is known given that less than 1% didn't have a view about the EU's importance and under 2% its role. Overall, the survey and media analysis suggest this is an area associated with the EU

While there is an understanding of the EU's role among the focus group participants and experts, its impact in Nigeria is mixed. There is a general perception that the EU could be doing more, especially among young respondents. In particular, the EU could be doing more with respect to the Niger Delta clean-up, including leveraging its influence with the European companies often implicated in environmental damage in Nigeria (and Africa). Additionally, interviewees mentioned that technology related to climate justice was not being transferred.

Energy

The EU is not very visible in this domain, according to the media analysis. However, energy is addressed across the data set in terms of EU promotion of green energy solutions as a response to the climate crisis.

While energy did not feature significantly as a theme of discussion in the focus groups, in the interviews, most interviewees noted that energy is one of the challenges for Nigeria felt the EU did not address. They spoke about the issues around electrification and the fact that the EU had the technology to ease the burden and has rhetorically spoken to investment, including infrastructural. The energy sector thus provides an opening for the EU to act and do so visibly as visibility was lacking in general in terms of whether the EU worked in this area.

Research, Science and Technology

Science, research and technology are hardly featured in the media analysis. Public opinion generally viewed the EU's role as necessary with respect to advancing innovation and technological progress. However, the United States (87.28%) and China (87.18%), were viewed as much more important in

terms of the extent of importance compared to the EU (75.09%). However, the question as posed referred to the EU's role in the world, so it was unspecific to Nigeria. More respondents did not know or could not answer about roles in this policy domain with respect to Brazil, South Africa and India. However, more were knowledgeable about the US, China, Russia and Japan. Approximately 3% of respondents did not think the EU was an important actor in advancing innovation and technological progress globally.

In both focus groups and interviews, this area was ranked very low in whether the EU engages in Nigeria this domain. One exception was an interview with a businessperson who argued that while the United States often came ahead with respect to science and technology, there was a lot to be said for Europe – so viewed this area very positively. However, the EU did not, to their mind, facilitate sharing of such technology for infrastructural development or energy, the domain where Nigeria needs support. Importantly, this area intersects with what many viewed as a problematic visa regime since this inhibits collaboration and training for Nigerians in their view.

Development and assistance

In the media, the EU's role as a development actor is treated positively. The main actors are the Commission via bilateral commitments and through the Delegation. EU actors identified in the media with respect to development include the Head of Delegation making the specific announcement around a particular initiative.

The focus groups and interviews provide a bit more context to the EU's development role. Here, most participants agree that the EU has a significant role. However, all the interviewees claimed that the EU's development activities were much less visible than that of the US and China. About two interviewees noted the more consistent visibility of USID and United Nations Development Programme (UNDP) and the United Nations International Children's Emergency Fund (UNICEF). Moreover, there was a sense that the EU's engagement has been less sustained than those of these other actors and centred around urban cities over rural areas.

The EU and Europe's role in development is firmly established, with 96% agreeing that the EU's support is very or somewhat important, ranking about as high as the United Nations, the United States, and the World Bank as important development actors.

Social

On social issues, the EU was particularly visible in social justice and gender equality– especially through its campaigns against gender-based violence. Moreover, the EU's drive for the use of more green energy and awareness around climate-based risks comes through in the media analysis quite well.

According to the public opinion survey, the EU is ranked well across a range of social development indicators. But especially so with respect to education, overall quality of life and climate activism. There are noteworthy reservations related to issues around migration and refugees as well as income inequality. Overall, more than 80% of respondents felt that the EU was positive in its performance across all social development indicators.

While the focus group identified EU performance on a range of social issues, the response as to whether the EU was an influential performer in this domain is mixed. Indeed, the EU's role in these areas is acknowledged; yet racism in Europe, as well as the treatment of migrants and refugees, are seen as negative when attached to the EU. The interviewees reinforced this view speaking to how difficult it is to access a visa even when one has a legitimate reason to go to Europe. Here, the EU was juxtaposed against the US, who about a quarter of respondents felt "respected" them, thus allowing travel in a straightforward manner. Beyond this, about a third of the respondents mentioned that the EU tended

to do a lot of its work through the same civil society groups rather than “spreading” their funds (NGCSO1).

Culture

When compared to others, the EU’s culture and lifestyle are considered attractive, though 9.95% of respondents would view the EU as either unattractive or couldn’t give an opinion. It is worth noting that the EU unattractiveness is lower compared to others in the dataset. For example, Russia, India, and South Africa do not fare well in terms of attractiveness when considering those who either did not find the cultures of these countries attractive or could not answer when compared with the EU’s performance. In general, Russia and South Africa were seen as not being very attractive. The attractiveness of the EU lifestyle is backed by a high opinion of different domains of the EU economy, including tourism, financial services, high-quality food standards.

In terms of the perceptions of different cultural fields, the Union fares relatively well with 80% or more of the population who consider the EU and Europe as having a positive impact. It is worth noting that «Europe» fares better in relation to culture and sport, which may suggest a greater sense of the Member States and non-member states. Certainly, in the focus groups and interviews, the United Kingdom and its impact on culture loomed large unsurprisingly as the former colonial power in the country. Moreover, language has an impact on different exposures. For those who had experienced Europe in person, the UK is their main point of reference. One interviewee noted that while the German Cultural Centre in Lagos put on several events, the French Alliance Française appeared “snobby” (NGCUL1) in comparison. Another noted that despite the seeming visibility of the Head of the EUD in Abuja, EU diplomats kept to themselves in comparison to the cultural activities put on by member states of the US and UK (NGMN1). On multiculturalism, though generally positive, there is a notable dip in the survey, and this is reflected in the focus groups and interviews. In the wake of the murder of George Floyd, there is a sense that while the US is having a more open conversation, Europe isn’t and particularly around the impact of colonialism and the perception that there is a persistence of coloniality in how migration is engaged as an issue area and of Africans in Europe.

Health

Nigerian public opinion mentioned global health as one of the areas where the EU performed well: it came second (after global trade) as an area where the action of the action was seen as good (either “very good” or “fairly good”), and more than three out of four respondents described it as “very good”. Respondents were also positive about the EU action in the field of medical research (95.5 % said the action of the EU was either “very good” or “good” in this domain).

From the interviews for those aware of the EU governance in this area, there is an acknowledgement that this is an important area of engagement for the EU and noted the efforts support COVAX. Yet, all noted the continued “vaccine apartheid” with respect to Africa’s access to vaccines. Most of these comments were not in direct reference to the treatment of Nigeria/Nigerians but generally informed by the news. Beyond COVID-19, there was no evidence that the EU engaged within the health domain in Nigeria in any substantive way. One respondent did note that the EU had been active with UN agencies in promoting water, sanitation, and hygiene (WASH) programmes and its impact had been positive to the communities served, though none could point to a specific programme.

Continuity and change behind actorness

There is often a gap between perceptions of the EU and Europe as asked in the opinion polls to what manifests in the interviews. Whereas the survey tends to focus on knowledge of the EU in certain areas in a general sense, which tends to yield quite positive responses when the focus is brought to EU with specific reference to Nigeria, there are more neutral or negative perceptions across the board. The EU is

seen as a very important actor with respect to trade and to an extent in political affairs linked to humanitarian support, too and tends to perform well in the media. This has remained consistent over the last few years. There have, however, also been specific rupture points in considering the perceptions of the EU in Nigeria.

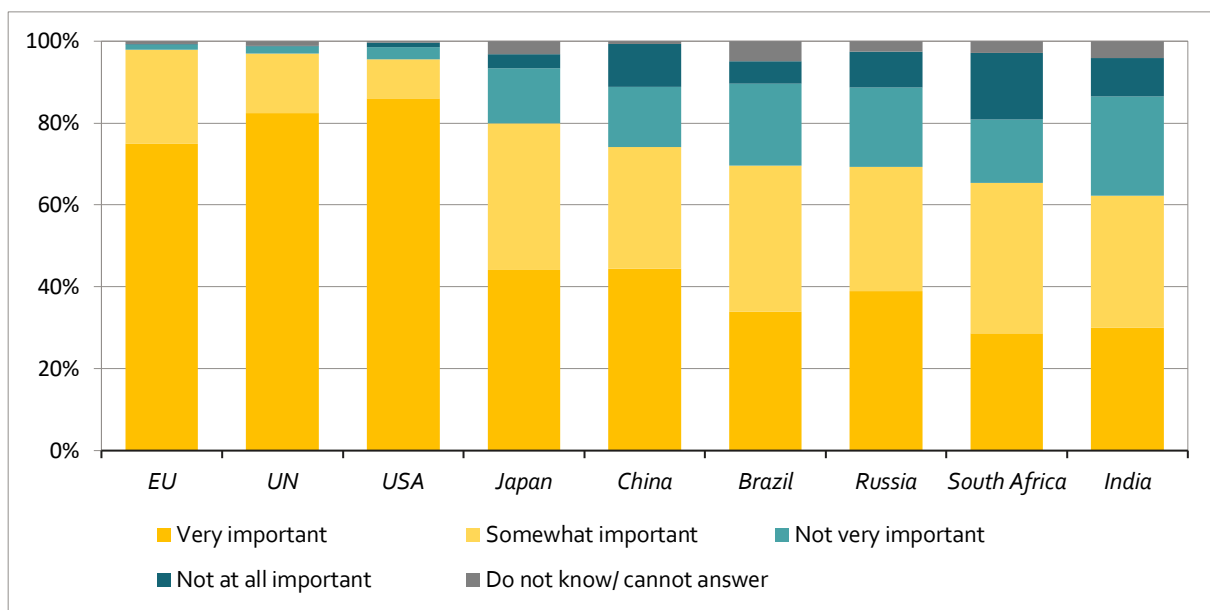
For many of the young people interviewed, Brexit has played a significant role in the immediate reactions to the EU, in addition to perceptions of the EU's approach to trade relations. So, while considered an important and influential actor, it is not always viewed positively with respect to trade with many interviewees across all age groups mentioning the EU's attitude to the Economic Partnership Agreements. This sentiment is dominant and reflected in the literature as well.

But in the main, knowledge of EU initiatives is limited. This is not to suggest that the EU is not present, but that it is not known compared to other actors like the United States through USID, the World Bank, the British Council or UK's former Department for International Development (DFID) and the German Agency for International Cooperation (GIZ). Recent efforts like the Spotlight Initiative were commended though there was a sense that the EU tended to be insular in who it engages with. Migration was a sore point within the focus group and amongst many interviews who noted family experiences of migration to Europe and the difficulties around obtaining visas. This forms a key driver of negative perceptions of the EU. Being able to immigrate to the EU is viewed as a positive opportunity, but the process of doing so and possibly negative experiences of life upon arrival affect how those back home in Nigeria views Europe.

The period in which this work is being undertaken means that COVID-related topics significantly dominate news about the EU. There are also references to the EU's ongoing promotion of human rights and democracy promotion. Indeed, across the interviews and media analysis, the EU's role in the promotion of democracy promotion both historic and ongoing, was noted and commended. One interviewee did note that the EU's engagement is not systematic and requires more nuanced, which may be helped by engaging the Nigerian experts in the country and in the diaspora rather than simply focusing on Independent National Electoral Commission (INEC) or civil society groups. The EU is praised for support to COVAX in the media and the interviewees. However, there was a general scepticism of whether this had a substantive impact on ordinary people who needed vaccines and urgently.

1.9.4. The EU as a norm-setter

FIGURE 81. PERCEPTION OF THE IMPORTANCE OF EU, OTHER ORGANISATIONS AND COUNTRIES IN GLOBAL HUMAN RIGHTS PROMOTION. NIGERIA



Note: based on Q11: In your view, how important, if at all, 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? (n=1012)

While over half of respondents agree that the EU shares the same democratic principles as Nigerians, a sizeable minority are neutral or do not agree with this notion. Whereas on whether the EU is an excellent example for promoting gender equality, another significant minority tended to be neutral or disagreed with this statement. These are significant since these are two areas that the EU has had a strong showing in terms of norm promotion.

Given the areas of engagement of the EU in the media, there is a good sense that the EU is an important actor with respect to norms, and this is also reflected in the public opinion polls with respect to the promotion of human rights, gender equality and democracy. The media would also suggest that given the joint work the EU undertakes with specific entities, it is well received as a norm setter, and we see this at the event announcing the winner of a video competition that was part of eliminating gender-based and sexual violence (GBSV) campaign who said “I urge the EU delegation to continue to encourage this kind of endeavour so as to bring an end to this menace” (Ojamarin cited in This Day, 11 March 2021).

But the opinion polls would suggest that with respect to personal values, with respect to pluralism, tolerance, non-discrimination, the EU did not share the same values as a significant minority of respondents (15-20%).

Across the focus groups and interviews, the EU is viewed as an important norm setter globally, though not in Nigeria. Having been a strong actor with respect to promoting regional integration and championing human rights and gender equality, most respondents felt that the EU could do more in Nigeria. The interviewees especially noted the prominence of the EU in democracy promotion via lots of activities and promoting programmes related to gender equality. Whereas the public opinion might highlight mainly positive views with respect to rights of persons and belonging minorities, interviewees

claim this applied on paper rather than with respect to African immigrants, for example. As one interviewee noted, “rhetoric is good” but EU needed “stop talking the language of morality” ostensibly to act morally (NGTT2). Further, another interviewee felt that promoting democracy the EU interfered with democratic processes in Nigeria. They noted: “why are they here? Why is the EU spending money funding parties...are these efforts intended to advance democracy or disrupt it?” (NGAC1). Thus, while the role of the EU is mainly favourable, there is scepticism about its motives and the consistency of its application of norms.

Continuity and change behind the perception of EU as a norm-setter

The EU is considered an important actor for human rights, democracy promotion and has always been. In the immediate past, this continues to be the case. Yet, the recent practices with respect to migration, the ongoing concerns around the ways in which the EU has pursued its economic interests via the EPAs. The more recent Brexit has also had an impact on the perception of the EU as a solid security community and exemplar of regional integration. These are themes that appear in the literature, in the focus groups and via the interviews. There is generally no indication that there are any significant changes in perception of Europe or the EU.

1.9.5. Continuity and change

Nigeria was not included in the 2015 study. Nevertheless, it is possible to observe that the academic literature on EU-Africa relations that attends to Nigeria focuses not only on trade, alongside development and security, but also on democracy and humanitarianism. Historically, the EU has been viewed as an important actor in Nigeria’s democratic consolidation and has been seen to play an important humanitarian role, particularly in the north of the country (Marinelli & Udo, 2012). This focus, however, has given way to a much greater focus on the EU’s impact on migration and the replacement of the Cotonou Agreement. There is no indication in the literature itself that there have been any significant changes in perception of Europe or the EU.

1.9.6. Recommendations for EU public diplomacy

There is a mixed view on the positive impact of the EU across the range of sources. The EU is viewed very positively as a promoter of human rights and in the area of democracy. The EU is also recognised as a significant global trade actor and in development more broadly. Across a range of topics, the EU is viewed mainly positively even when this is more in relative terms to other actors or in a global sense rather than with reference to Nigeria. At the same time, the EU is challenged on the issues of pluralism and tolerance, and this is manifested in the focus group and interviews. The EU is a hegemonic power whose best aspirations are not always reflected in practice in these two contexts. Several respondents, usually in the 40s and below, referred to the EU as neo-colonial; others asked for more respect from the EU and generally that the EU would do better in Nigeria if it lived consistently with the norms it claims to project. This was particularly with respect to the EU’s migration regime and pushed for Economic Partnership agreements.

The negative perceptions of the EU in Nigeria, where they exist, are very strong. One respondent called the EU ignorant and racist, saying the EU “cannot relate to you outside of victimhood” (NGCSO1). In this sense, there is a sense that Nigerian agency in the context of its relationship with the EU is often ignored. Another respondent went so far as to say that the EU is the “centre of everything that has gone wrong in lots of ways” (NGAC1). This negative perception stems from the fact that although the EUD as the EU’s representative in Nigeria is engaged in a variety of activities, compared to other actors like members states and international organisations like the UNDP, it has low visibility. For example, NGAC1 noted that “unlike other actors the EU, does not do much of public diplomacy compared to the UN, private corporation [Bill & Melinda Gates Foundation]”. Two other respondents agreed on the

significant impact of the Bill & Melinda Gates Foundation and the WHO in health compared to the EU. This is a prevailing sense from the focus groups, interviews and indicated in the silences in the literature. Yet this is not necessarily reflected in the public opinion polls.

In any case, it makes sense then that as a medium to long term strategy, the EUD move beyond the 'Abuja Bubble' by working more closely with member states on initiatives of mutual interests and outside of urban areas. In enhance reputation and achieve results, partnering with UN agencies such as UNDP (for development) UNESCO (for education) and WHO and Bill and Melinda Gates Foundation (for health) would support the EU's ambitions in this regard. Additionally, the use of social media, especially Instagram through collaboration with influencers can bring the EU to broader appeal. Finally, collaborations with organisations like the Open Society Initiative for West Africa, who is very active in civic spaces and viewed positively could facilitate closer relations with civic publics in Nigeria.

Theme: Environment/Climate Change

The environment and climate change is an important issue area for EU action and has been identified by the EUD as a priority area for future public diplomacy programming. Moreover, engagement in this area is identified as important for EU foreign policy engagements in Nigeria and highlighted as being generally of high importance in the public opinion polls and interviews. This has implications in the short, medium and long term.

Policy aims

- Demonstrate EU leadership in this area via policy initiatives;
- Build transnational and multistakeholder coalition with Nigerian partners to meet tackle climate change together.

Short Term

- Identify the key partners for collaboration including youth and local climate change/environmental civil society groups;
- Provide capacity support to use technology that can aid in climate justice;
- Support platform to build a community of practice around climate change and the environment in Nigeria;
- Share technology to help Nigeria accelerate its energy transition and climate ambition, and reduce reliance on fossil fuels;
- Initiate focused dialogue on the urgency of climate change with population via use of social media especially Instagram while Twitter remains banned as a way to socialize the population.

Medium to Long Term

- Support Nigeria in the transition from economic dependence on crude oil to a more diversified economy;
- Hold European companies accountable for environmental damage in Nigeria (and Africa);
- Support Nigeria's constitutional mandate to protect and improve the environment and safeguard the water, air and land, forest and wildlife;
- Incorporate environmental concerns into economic decision-making and cooperation;
- Help to develop a national strategic approach towards promoting climate-resilience and sustainable development;

- Exchange best practices and promote transnational collaboration and knowledge-sharing on Environment and Climate Change.

Whom to involve from key audiences

EU Delegation, EEAS, Ministries of Energy, Environment and Agriculture; environmental NGOs, Academia, think tanks; businesses, public and private investors, EU Member State Embassies, EU cultural institutes (Goethe Institute; Alliance Française).

Theme: Democracy and Human Rights

This is viewed as a clear area of strength for the EU, as a norm promoter. The EU has supported many initiatives, particularly those linked to elections, and continues to support many non-governmental organisations (NGOs) whose mandate focuses on human rights. This is an area where the EU and Nigerians (though not necessarily the government) are seen to share values. Yet, those values are not always evident in Nigeria's governance or the everyday experiences of citizens. For this reason, some interviewees question the EU's consistency, particularly in relation to other issues areas like economic and trade policies or migration and mobility. The EU is considered hypocritical by youth who perceive the EU as using human rights only when it suits its agenda and ignored where it does not.

Policy aims

- Strengthen human rights architecture through collaboration with government and civil society;
- Integrate human rights norms as a consistent element of political dialogue, development cooperation and crisis response in the EU's contributions to crisis and conflict in Nigeria;
- Strengthening the rule of law in compliance with international human rights instruments through the localisation of these instruments;
- Prioritise women's human rights, by combatting gender-based violence through funding and range of initiatives;
- Electoral support to facilitate free and fair elections i.e., elections free of violence.

Short Term

- Organise workshops to train security sector including the police and military with a focus on protecting civilians;
- Provide forums for dialogue on electoral reform in Nigeria at local, state and national level;
- Partner with more state governments and diversify civil society partners to intensify campaigns against gender-based violence leveraging annual 16 Days of Activism against Gender based violence;
- Raise public awareness and mobilise actions from citizens and government on women's human rights using influencers and social media especially Instagram;
- Broaden pool of engagement especially with civil society groups dealing with the rights of minoritized people in Nigeria.

Medium to Long Term

- Ensure that human rights underpin every dimension of the EU's engagement with Nigeria including trade and migration cooperation;

- Strengthen the institutional capacity of the state to support victims and survivors of gender based violence;
- Invest in long term dialogue on the protection of the rights of minoritized people especially disabled people and LGBT+ persons.

Whom to involve from key audiences

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

Theme: Migration and Mobility

This is an area of high importance to the EU, in terms of managing migrations flows into Europe and protecting irregular migrants from activities of human traffickers. However, the EU's interventions has been a source of negative perceptions of the EU as evidenced in the media analysis, interviews, focus groups and the literature. It is thus important to explore some recommendations to improve perceptions and engenders better relations on this issue.

Policy aims

- To find agreement that suits the EU and meets the needs of Nigerians especially youth;
- Foster more regular routes of migration especially for young people;
- Combat trafficking and smuggling through cooperation with authorities in third countries like Nigeria.

Short Term

- Fund extensive study to better understand why people move the way they do in Nigeria (and in the Diaspora);
- Retreat from the border protection approach which militarised responses to migration and undermines trust;
- Expand the reach of the ERASMUS+ programme to facilitate regular migration pathways for university bound youths.

Medium to Long Term

- Streamline Schengen visa application process to foster good relations and engender mobility equity for Black Africans;
- Develop strategies to directly support deported Nigerians including efforts to reduce stigma they face;
- Expedite the Blue Card scheme for qualified Nigerians similar to the US' Green Card scheme;
- Develop amnesty initiative for irregular migrants in the EU by working with member states.

Whom to involve from key audiences

Ministry of Education; ERASMUS+; Nigeria in Diaspora Commission (NIDCOM); research think tanks and academia; EU member states national government agency responsible for immigration; European Commission.

Theme: Health

Particularly with respect to COVID, Health has climbed up the agenda of the EU relations with Nigeria though it is not new. While the EU has supported PPE distribution and vaccine donations in Nigeria to a certain extent, media analysis and perceptions emanating from interviews and focus groups spotlighted what has been termed vaccine apartheid and the challenges of distribution within Europe itself. This issue will not disappear as the Delta variant evolves and given the likelihood of other pandemics/epidemics. How the EU responds to this challenge now and in the future would be crucial for perceptions of the Union and Europe more broadly.

Policy aims

- To show leadership in Global Health governance;
- To enhance institutional governance of health through support to mitigating epidemics (e.g. Ebola) and building the infrastructure to cope with global crises like COVID-19;
- Meet Goal 3 of the Sustainable Development Goals (SDGs) aimed at ensuring healthy lives and promoting well-being for all at all ages.

Short Term

- Action Plan to accelerate access to COVID-19 vaccines for Africans including Nigerians leveraging positive perceptions of Team Europe;
- Facilitate dialogue between civil society and government so that policy is responsive to direct needs of citizens.

Medium to Long Term

- Seek enduring partnerships with recognisable actors in Nigeria to meet the goals of enhanced health access, e.g. UNICEF;
- Develop comprehensive strategy towards neglected diseases like Malaria;
- Make health a cross-cutting issue across trade, development, human rights promotion and security with attention to Nigerian needs;
- Support reserve for PPE and institutional preparedness to deal with future epidemics/pandemics.

Whom to involve from key audiences

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

Theme: Economy and Trade

The EU's role as an economic and trade powerhouse is acknowledged across a range of sources. Yet while public opinion mainly views this role in a positive light, interviewees, the focus groups and existing literatures have been critical of the EU's strong handed approach to trade negotiations. The EU is seen as only preserving its own interests to the detriment of those of its African 'partners' including Nigerians. Indeed, this view is also held by political elites, and the government refused to sign the Economic Partnership Agreement proposed by the EU as bad for labour and the overall economic health of the country. It is in this area that the most negative perception of the EU is held with respondents complaining about being condescended to by Europeans and attributing this to racism or neo-

colonialism. This is therefore the most significant determinant of future relations, with significant impact on Nigerian perceptions of the EU. It also lends itself to short, medium and long term.

Policy aims

- Preserve EU position as economic powerhouse while promoting free trade as path towards poverty reduction;
- Promote investment activities in Nigeria and the African continent as a whole;
- Support the access for EU companies in the world.

Short Term

- A moratorium on the implementation of the Economic Partnership Agreement for West Africa;
- Conduct sectoral dialogues with key sectors and stakeholders regionally.

Medium to Long Term

- Negotiate a fair bi-lateral trade agreement that considers the regional ambitions of free trade in Africa;
- Develop a specific strategy for investment that considers the Nigerian environment specifically.

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.

1.10. Republic of Korea

This Country Chapter presents a synthesis of the Republic of Korea-specific findings of traditional and social media analysis; interviews, focus groups and public opinion poll that were all conducted in the framework of this study. The Chapter follows the logic of the research design of the study at hand. We present the main findings for Republic of Korea according to the research criteria applied – namely visibility; actorness and local resonance; and norm-setting. Moreover, in the section on actorness and local resonance, we discuss these according to the themes analysed in this study: economy and trade; political issues; development; social issues; environment; energy; science, research, and technology; culture; education; health (new perspective). The final section before policy recommendations looks at the local conditions that explain the perception of the EU in Republic of Korea. We conclude the chapter with recommendations for the EU's public diplomacy in Republic of Korea.

Summary

In 2021, despite multiple internal crises within the EU, perceptions of the EU in the Republic of Korea have improved in comparison to 2015. In the Republic of Korea, the EU is seen predominantly as an important trading partner, with EU- Korea FTA being regarded as a successful international treaty. Even so, in the eyes of the Korean public and elites, the EU lags 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 the Republic of Korea.

In 2021, the COVID-19 pandemic became the main focus of EU media coverage in the 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 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 the 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 the Republic of Korea are climate change prevention; research, science, and technology; education, and culture.

1.10.1. Sample

Public opinion

The online survey was coordinated and conducted by PPMI through an online panel provided by *Syno International*. The respondents in Republic of Korea were surveyed in Korean. Data collection took place from 28 April to 16 May 2021. The sampling for the survey was designed to be nationally representative by age, gender and regions. Respondent profiles in Korea were established based on data from the Republic of Korea bureau for Statistics (Kosis).³³ The survey included a total of 1030 individuals aged between 15 and 64 years old³⁴.

Media

The quantitative part evaluating the general trends in a large press media sample was carried out by PPMI. Five popular prestigious dailies *The Chosun Ilbo*, *JoongAng Ilbo*, *Dong-A Ilbo*, *Hankook Ilbo*, *BUSn Ilbo* and one business daily, *Maeil Kyungje*, were monitored from 1 February to 30 April, 2021. The *Factiva* repository was used to aggregate content from both licensed and free sources, and in-house data processing was applied to produce the results.

Two separate datasets in Korean language were collected over the period of observation – “EU” (1454 articles) and “Europe” (2847 articles) in Korean language. Search terms for the dataset “EU” are: “European Union”, “EU”, “European Commission”, “European Parliament”, “Court of Justice of the European Union”, “EU presidency”, “EU Council”, “European Council”, “Council of the European Union”, “Eurozone”, “European Central Bank”, “European Investment Bank”, “European Medicines Agency”. The search terms for the dataset “Europe” are “Europe”, “European” and “Europeans”. The search terms for “EU” and “Europe” datasets consider both plural and singular forms as well as possible grammatical forms of the search terms in the local language. Europe dataset excludes articles containing any of the “EU” dataset keywords. The articles included into the “EU” dataset may include “Europe” related search terms together with the EU related ones. The articles included into “Europe” dataset include only Europe related search terms

The qualitative media content analysis was designed, supervised, and coordinated by experts from Public Diplomacy and Political Communication Forum (PD-PCF), University of Canterbury (UC), New Zealand, and conducted by local researchers trained by the PD-PCF. PPMI collected the media sample (107 articles) using the search engine from three prestigious newspapers *Chosun Ilbo*; *JoongAng Ilbo* *Dong-A Ilbo* for country experts for in depth qualitative analysis. The exact timeframe of observation remained the same. Experts analysed the EU image created by applying elements of content, cognitive and critical discourse analyses.

³³ Korean Statistical Information Service: <https://kosis.kr/eng/>

³⁴ Detailed public opinion survey data are available in Annex II of this Report – Comparative public opinion survey report.

Social media

PPMI carried out the social media analysis. The data collection process was automated using the online social media monitoring tool *Mediatoolkit*. Social media posts were collected from Twitter, Facebook and Instagram with the use of automated queries. Coverage of the EU was traced using a set of the EU-related keywords: “European Union”, “EU”, “European Commission”, “European Parliament”, “Court of Justice of the European Union”, “CJEU”, “EU presidency”, “EU Council”, “Council of the European Union”, “European Council”, “Eurozone”, “European Central Bank”, “European Investment Bank”, “European Medicines Agency”. All the keywords were additionally traced in one-word format to capture related hashtags: *europeanunion*, *europeancomission*, *europeanparliament*, *courtsofjusticeoftheeuropeanunion*, *eupresidency*, *eucouncil*, *europeancouncil*, *counciloftheeuropeanunion*, *europeancentralbank*, *europeaninvestmentbank*, *europeanmedicinesagency*. Europe-specific keywords used for filtering relevant social media posts are “Europe” and “European”. Europe dataset excludes posts containing any of the “EU” dataset keywords. Additionally, a location filter was used to ensure that the collected mentions originate from Republic of Korea. A language filter was set up to collect posts in English and Korean.

The resulting sample of Korean social media posts collected from 1 February to 30 April 2021 includes 8656 mentions, of which 3535 are of the EU (5% in Korean language) and 5121 of Europe (43% in Korean language).

Working with social media platforms, the Project Team followed each platform’s terms of use. All identifiable information of individuals from social media data remains confidential and is removed before the publication of findings. Computational analyses of the samples involve only contents from media databases’ public websites – posts that are available to general audiences. No generalised conclusions that might cause any potential harm to identifiable communities are drawn from social media analysis.

Interviews and focus groups

Interviews with local opinion- and decision-makers as well as focus groups with students were conducted by the Country Experts, with training support and supervision from PD-PCF, UC, following the approval of the UC Human Ethics Committee. As part of this study, interviews and focus groups aim to provide in-depth explanations about Korean perceptions of Europe and the EU and cross-reference the findings from the public opinion survey, traditional and social media analyses.

The focus group participants are nine students (6 males and 3 females) in their early and mid-20s from three different majors (international studies, development studies and civil engineering) in two individual groups. Both focus group discussions were conducted on 29 March 2021. Except for the students majoring in international studies/development and co-operation, the participants have no direct communication or personal experience of contact with the EU/Europe. Most respondents had no clear image or opinion about the EU, its policies, and its performance as a global actor.

The interviews took place from 1 to 11 June, 2021. The 12 interviewees -5 females and 7 males in the age range between 40s and 60s, represent academy, think tanks, politics and policy makers, media and civil society. Ten of the interviewees have had extended stays in the EU or a European country for their studies or work. The European countries the experts have the greatest personal experience are France the UK and Germany.

1.10.2. Visibility

Koreans tend to report sufficient knowledge of the EU. Only 3.2% of respondents choose “Do not know” answer to a question regarding their opinion of the EU (2% for the US, 2.3% for China, 3.2% for Japan

and 3.5% for UN). At the same time, respondents in Republic of Korea do not have a clearly defined image of the EU – of ten descriptors (7 positive and 3 negative) potentially associated with the EU and other countries, only one – “peaceful” was chosen concerning the EU by more than 30% of respondents (32 % out of 1,020). Respondents were not limited in the number of descriptors they could choose. The respondents’ top 5 descriptors associated with the EU generally indicate the public’s inclination to see the EU as efficient (27%), united (25.4%), modern (23.2%) and trustworthy (22.3%). The numbers presented slight improvement compared to 2015 when none of the ten descriptors was chosen by more than 25% of respondents. In 2015, 24.3% of respondents believed the EU to be peaceful and 24.5% modern. A significant share of respondents (8.6%) could not choose any among suggested descriptors of the EU (a slight improvement from 11% in 2015).

Despite overall low share of respondents having clear image of the EU in the eyes of Korean public its positive image is lagging only behind the US which is seen as strong (48.8% - the second highest share of respondents to choose any descriptor associating with any of the countries in the list) and modern (40%).

Republic of Korea demonstrates some antipathy towards the country’s direct neighbours. The countries having the most negative opinion among the Korean public are Japan, China and Russia. Japan and China are seen as hypocritical (49.1% and 42% respectively) and arrogant (45.9% and 45.8%), China and Russia – as aggressive (38.2% and 32.2%).

Of three negative descriptors none was selected in relation to the EU by more than 6% of respondents. A significant number of respondents (8.6%) did not have any image of the EU. This number is lower for the US (3.2%), China (4.4 %) and Japan (4.1%) but somewhat higher for Russia (12.4%) and much higher for South Africa and India (between 30% and 40%).

The public in Republic of Korea tends to evaluate the EU performance in different economic and social activities domains positively overall but refrains from superlative evaluations. The EU performance in tourism is appreciated by the Korean public the most (62% of respondents evaluate it as “very good” (25.5%) or “fairly good”(36.9%)). The development of new technologies, science and research, green technologies, sustainability, and global trade is evaluated positively by 56-58% of respondents. The EU entertainment industry in 2021 remains the most minor appreciated area by the Korean public (41% in 2021 and 30.4% in 2015).

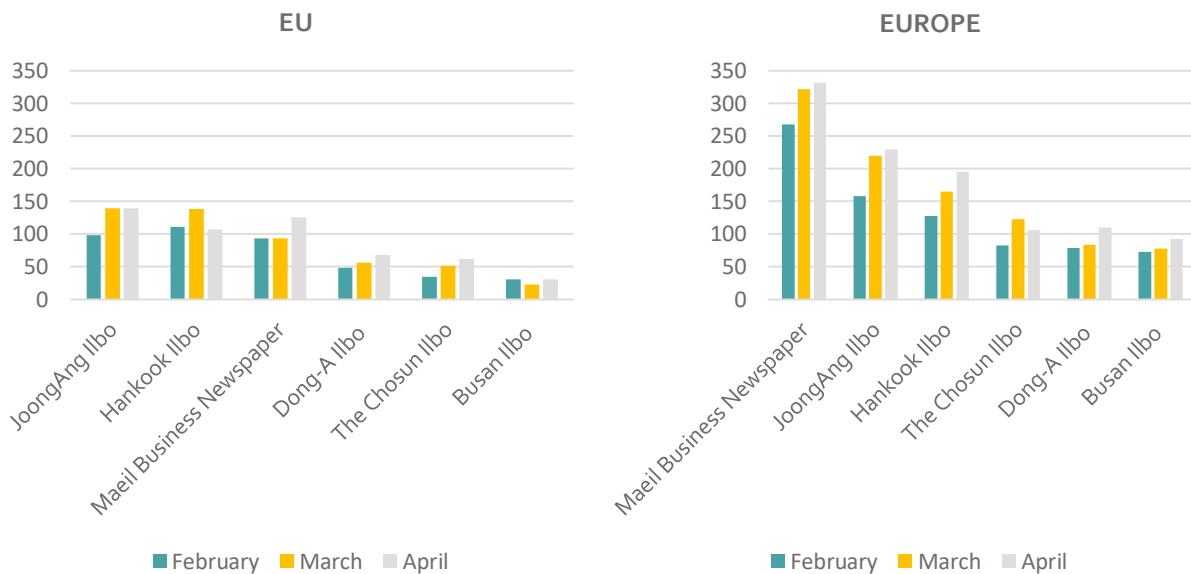
For each of the domains, the share of respondents who chose “fairly good” evaluation was bigger than “very good” (the tendency did not change in 2021 compared to 2015). Although science and research is among the five top-rated fields of the EU performance, the highest share of respondents (40.2%) believes it to be “fairly good” rather than “very good” (17%).

Overall, EU performance evaluation has improved in 2021 compared to 2015. The highest rise was in the positive evaluation of EU performance in space exploration and technologies (46.6% in 2021 compared to 30.6% in 2015), development of new technologies (to 57.2% from 43.4%), industrial development (to 53.3% from 42.9%) and medical research (to 53.5% from 44.4%).

Compared to 2015, in 2021 the role of the major sources of the EU news in Republic of Korea has somewhat changed. In 2021 the TV is the principal source of news about the EU (mentioned by 64.1% of respondents compared to 70% in 2015) followed by the online media (52.5% compared to 54% in 2015). Print media has lost most significantly (20% compared to 28% in 2015). The role of social media remains virtually unchanged (19% compared to 21%). Similarly to 2015 the highest share of Korean Public (35%) hears of the EU about once per week; about 25% once per month (increase from under 20% in 2015); 16% daily (similar to 2015); and 25% rarely or never (significant increase from under 10% in 2015).

During the period of observation, *media* coverage of Europe is higher compared to the EU. Of all the press articles covering the EU and Europe, 64% relates to Europe and 36% to the EU and its' institutions. The EU had similar *media* visibility in March (34.6% of all the EU related news articles) and April (36.7%) and slightly lower in February (28.7%). Media coverage of "Europe" had a similar pattern, slightly lower in February (27.7%) than in March (34.8%) or April (37.4%). This spark reflected EMA's review on AZ vaccine's blood clot issues in March and continued until April (both for EU and Europe).

FIGURE 82. VOLUME OF NEWS ITEMS WITH A REFERENCE TO THE EU AND EUROPE IN TRADITIONAL MEDIA. REPUBLIC OF KOREA



Note: based on automated quantitative data analysis. Includes press articles which report on the EU and Europe as a principal or secondary subject of the article.

Compared to 2015, in 2021, the EU's centrality in the relevant news items has decreased significantly (from 45% to 12%). In 2015, Korean newspapers focused on the EU's internal crises, which had the potential to impact Republic of Korea directly or indirectly — the Greek financial crisis, Brexit and refugee crisis. In 2021, Brexit and its aftermath remains one of the key topics of the press coverage, but many articles presented the EU as the "place" where the UK exited from and not as an actor.

In 2021 due to the global impact of COVID-19, the EU was more often covered indirectly in Korean news articles (one of the international response cases to COVID-19). Nevertheless, a particular share of COVID-19 related articles covers the EU as a prominent actor. These articles report on EU- South-Korea vaccine-related contacts and best practices exchange in pandemic response.

Other issues which place the EU in the centre of press reports in Korean media include reaction to the Navalny case in Russia's and the EU's response to the 2021 military coup in Myanmar.

In social media, the visibility of "Europe" is comparable to that of "the EU" for most of the period of observation. There are several peaks in Europe and the EU related post numbers registered during the period of observation. The "Europe" related posts peak registered on 19 April is linked to the news on creating the European Super League. Tweets about the conflict in Tigray region in Ethiopia and the political situation in Myanmar generated the smaller "EU" corresponding peak on 9-10 April. In both cases, the EU's involvement is presented as needed.

Member States and MSs' leaders' visibility, EU institutions and EU leaders' visibility

The European Central Bank is the most frequently mentioned EU institution in Korean *media* in 2021 (48 mentions in the “EU” and “Europe” datasets in total). The *media* pays slightly less attention to European Parliament (39). A notable amount of mentions relates to European Council (14), European Commission (13), European Medicines Agency (13), and European Investment Bank (6).

In both the 2015 and 2021 studies, the European Central Bank has been the most frequently mentioned EU institution in the articles, which portrayed the EU as the central actor. While in 2015, ECB mainly was noted due to its role in EU reaction to the Greek debt crisis and the Greek government’s negotiation with the EU Troika, in 2021, the mentions are related to ECB influence on the global stock market (e.g. interest rates and financial/monetary measures in response to COVID-19 pandemic). European Parliament and European Commission are also presented in the context of the EU COVID-19 response. In the 2015 study, the European Council ranked second and the European Commission third.

Social media present more political and socially oriented view of the EU. In 2021, European Commission is the most mentioned EU institution in Korean social media with 45 mentions. It is followed by European Medicines Agency (32 mentions) and the European Central Bank (30), European Parliament (17) and European Investment Bank (15).

In 2015, the most visible EU officials in Korean media were involved in the Greek debt crisis negotiations. The most frequently mentioned EU official was European Commission president Jean-Claude Juncker followed by ECB president Mario Draghi and Eurogroup president Jeroen Dijsselbloem. The EU High Representative Federica Mogherini was visible due to her role in the EU response to various global and regional crises.

Compared to 2015, in 2021, the visibility of EU officials has significantly decreased in Korean media. Contrary to 2015, when Korean media regarded the EU as the centre of economic crisis. In 2021 the COVID-19 crisis reports dominated the international news sections and shifting the focus of attention from the EU. In 2021, the most visible EU officials are the President of the European Central Bank Christine Lagarde (20 mentions), the President of the European Council, Charles Michel (17 mentions), and the EU High Representative, Josep Borrell. These numbers confirm the tendency of Korean media to report on the EU predominantly in the context of economic developments.

In 2021, the most mentioned EU politicians are the leaders of the most visible EU Member States - President of France, Emmanuel Macron (87 mentions), Chancellor of Germany, Angela Merkel (86) and Prime Minister of Italy Mario Draghi (32). The most mentioned Member States in traditional media are Germany, France and Italy. While Italy’s visibility was promoted by former ECB president Mario Draghi becoming the prime minister of Italy, the high visibility of Germany and France is a continuation of the general trend of these countries being perceived as the symbolic representatives of the EU and the most influential EU Member States.

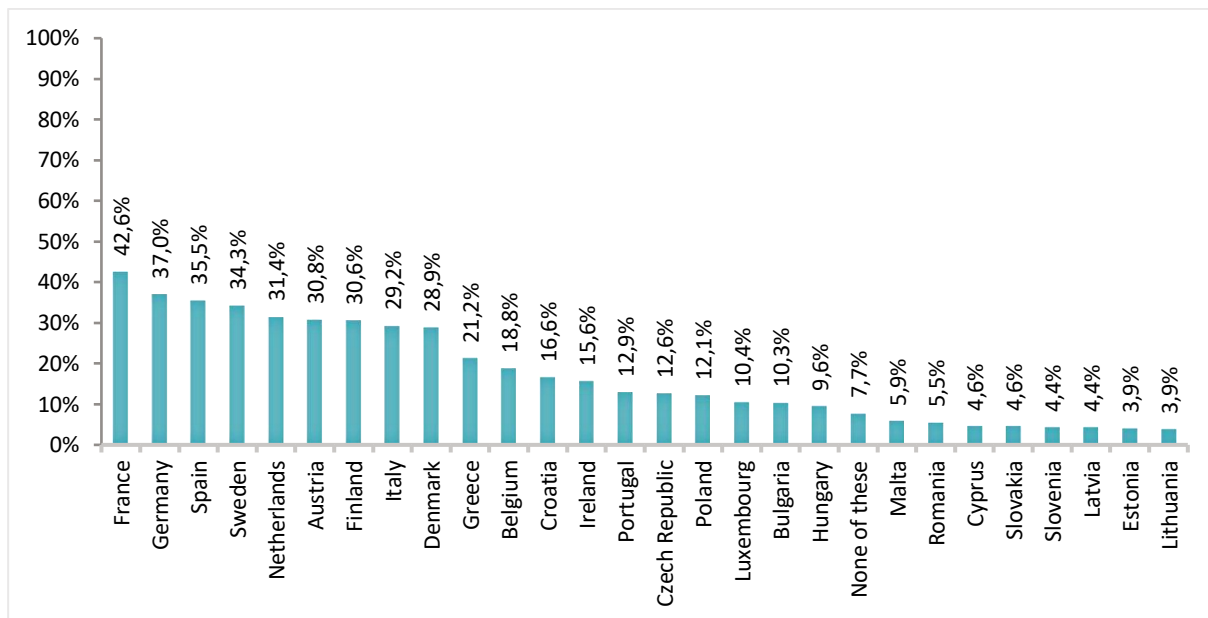
The Korean media tends to point to Germany as the most significant and symbolic EU Member State. When Germany suspended AstraZeneca vaccines due to blood clot issues, it was reported that other countries like France and Italy followed Germany’s decision.

Like in *traditional media*, Germany and France are the two most mentioned Member States in Korean *social media* posts, confirming the notion of the two countries as symbolic representatives of the EU. Other Member States visible on social media are Italy, Spain, Sweden, and the Netherlands. For all Member States, the highest number of mentions stems from Europe and not the EU-related feed.

In 2015, the most mentioned EU Member States in the traditional media were Greece, Germany, and the UK - in connection to the Greek debt crisis (Greece and Germany) and Brexit Referendum (the UK). The

UK was also perceived as one of the three EU significant states. The most visible EU politicians were the most prominent role in the Greek debt negotiation, Alexis Tsipras, Angela Merkel, David Cameron, and Francois Hollande.

FIGURE 83. ATTRACTIVENESS OF THE INDIVIDUAL EU MEMBER STATES. REPUBLIC OF KOREA



Note: based on Q25: Please indicate which European countries look the most attractive to you? Respondents could choose more than one country (n=1030). Respondents were not limited in the number of countries they could name.

The perception of individual Member States attractiveness is partially based on the awareness of them. Thus, the two EU Member States most frequently mentioned in traditional and social media – France and Germany - are also named by the Korean public as the two most attractive. As one of the experts presented it, traditionally among the EU countries, Britain, France, and Germany have shown the greatest strength in public diplomacy. With the Brexit, Germany and France remain the two “EU representatives” in Korean public eyes. One of the focus group participants mentioned Germany as one of the spontaneous associations with the EU. Another said German cars as an attractive product. One expert, however, mentioned Estonia and its digital government system as a positive case and a state with a mindset close to the Korean policy outlook.

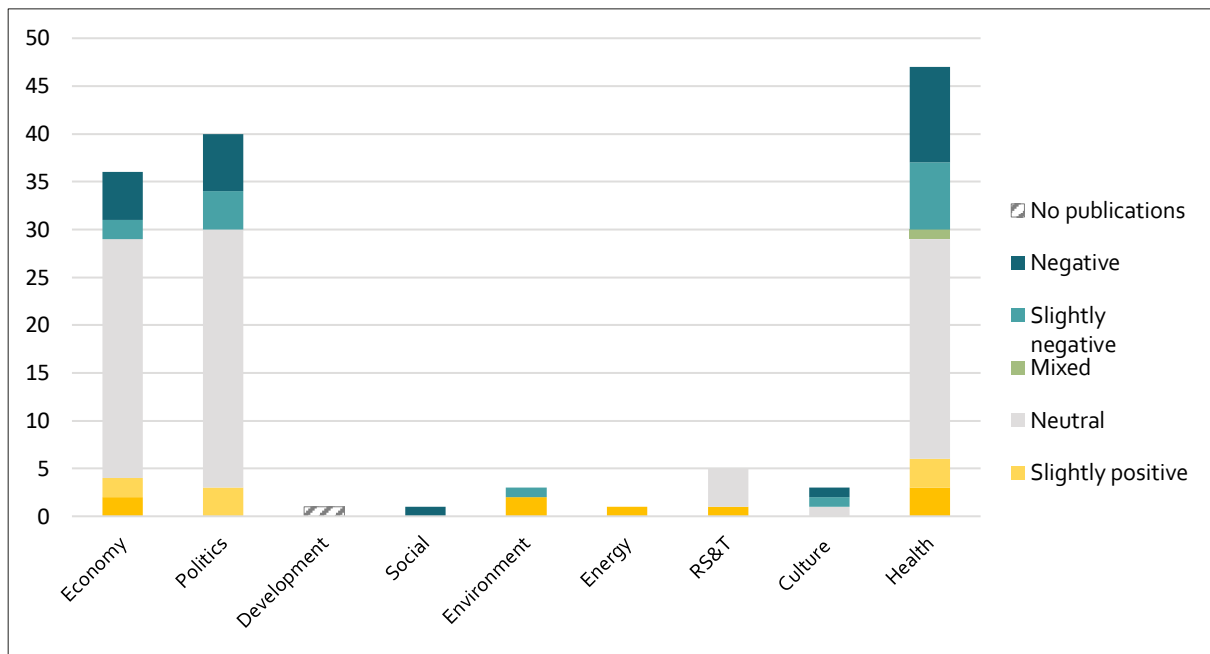
Emotive charge

Due to the linguistic limitations, not enough results were generated by automated quantitative methods to evaluate emotive charge in Korean media articles. Qualitative analysis of press articles that portray the EU as the principal subject (107 articles in total) reveals that media predominantly presents the EU in a neutral tone (59% of press articles), 28% negative and 13% positive tone.

Unlike 2015, when the economy was the primary topic for press materials that presented the EU as a central actor (followed by politics and social themes), in 2021, health became the most reported theme in the articles centred on the EU and its policies. The health theme also features the most significant share of articles (36%) that present the EU negatively. In addition, in contrast to 2015, in 2021, the number of articles in the politics theme is slightly higher than in the economy theme (Figure 84). The change is attributed to the coverage of Brexit and its aftermath by the press in Republic of Korea with the EU-UK bilateral being presented as a political issue.

In social media, the share of negative posts is the most significant (37.3%), followed by positive (33.6%) and neutral (29.1%). Compared to the EU, Europe has a significantly smaller share of negatively charged posts (20.8%) a substantially bigger share of the positive post (42.1%).

FIGURE 84. EMOTIVE CHARGE IN PRESS ARTICLES REPORTING ON THE EU AS A PRINCIPAL SUBJECT. REPUBLIC OF KOREA



Note: Based on qualitative media analysis conducted by country experts. One article can reflect more than one theme.

Continuity and change behind visibility and emotive charge

Literature suggests that traditional media coverage remains the primary mode of EU image formation in Republic of Korea. Therefore, most studies of EU perceptions in Korea examine images of the EU in traditional and new (social) media rather than perceptions of the EU among the general public and/or national decision- and policymakers.

Although qualitative analysis suggests that the economy is the most reported EU-related issue in Korean media, the most significant share of articles that portray the EU as a principle subject cover health issues. The burning issue of the COVID-19 pandemic and EU response to it contributed to negative coverage of the EU in Korean media. Focus groups participants almost unanimously agree that the EU COVID-19 response has negatively impacted the EU image in Republic of Korea. As one of the participants put it, “I recognized that they are not advanced in terms of the public health system”. One expert representing the media believes that diverse modes of COVID-19 response in the individual Member States have uncovered the fractured state of the EU.

The Brexit and its aftermath have contributed to the rise of politic related articles centred on the EU. In Republic of Korea, Brexit is seen as an event with a global impact that can undermine the EU global position. As one focus group participant puts it, due to the Brexit debate, “scepticism about the EU was raised”. One of the experts believes Brexit is the event demonstrating the fragility of the EU and lack of internal solidarity between the EU Member States.

Previously, it has been suggested that traditional media in Korea tends to frame the EU rather critically in terms of its economic status (Chung & Park, 2016). In recent years, the media coverage tends to focus on the EU in the context of crises and the crises impact on the EU economic performance. Despite being overshadowed by health and political themes, in 2021, the economy remains among the top themes in the articles which cover the EU as the central subject. In 2015 the media focused on the Greek debt crisis and the perspective of the UK leaving the EU. In 2021, the key EU-related turmoil in Korean media is the COVID-19 pandemic and Brexit aftermath.

1.10.3. Actorness and local resonance

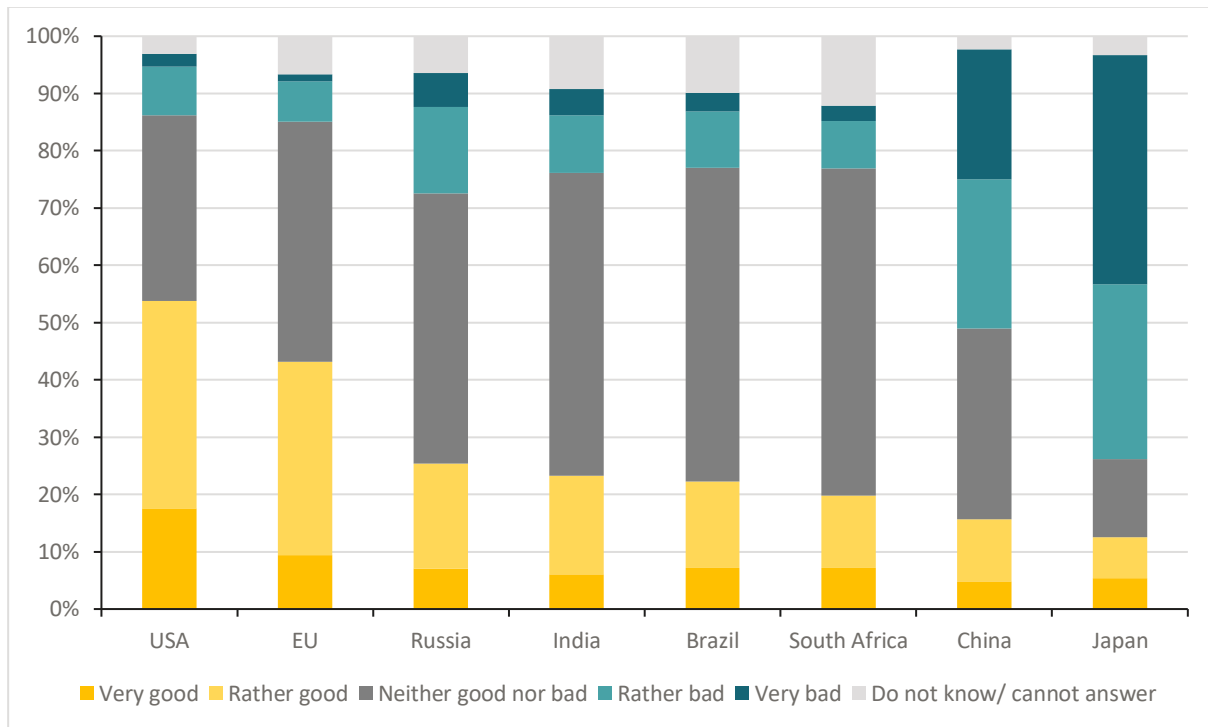
The EU as a partner

Similarly to 2015, in 2021 the EU in Republic of Korea is perceived positively but is overshadowed by the US and the UN as the most highly regarded international actors.

In 2021, 43.2% of respondents in Korea see relations with the EU as very good or somewhat good (compared to 40% in 2015). The share of respondents who think that relations with the EU are neither good nor bad has slightly decreased in 2021 compared to 2015 (from 51.3% to 47.3%). But the share of respondents who think their country's relations with the EU is bad has increased from 3.3% in 2015 to 8% in 2021. Still, the respondents in Republic of Korea perceive their country's relations with the EU as the second-best to the US (54% of respondents see relations with the US as very good or somewhat good and 32.4% as neither good nor bad). The focus group and expert interviewees also express favourable opinions towards the US. Compared with the 2015 round, Korean public opinion survey respondents perceived uneasy relations with their regional powers – China and Japan- as bad (49% and 70.5%, respectively). Notably, the Korean public respondents evaluated Korea's relations with Russia as neutral (42% neither good nor bad). Korean public presented a low level of positivity of Korea's relations with India, Brazil and South Africa (slightly over 20% see them as very good or rather suitable for all three countries).

Koreans regard the US, China, Japan and Russia as 'Four Major Powers' due to their engagement with and potential of influence on North Korean authorities and subsequent significance for the critical interests of the Republic of Korea. The press and experts frequently mention them in the context of the peace process on the Korean peninsula (e.g. Six-Party Talks) and their UN Security Council permanent memberships. Three of the four of these countries (China, Japan, and the US) are also mentioned by the experts as the major trade partners to Korea. The key influencers in Korea tend to pay more attention to the Republic of Korea's relations with the US due to its crucial role in the peace process on the Korean peninsula. Due to the history of bilateral relations, the Korean public sees China, Japan, and Russia less favourably than the US. The EU, not being directly involved in the peace process on the Korean peninsula, lags the UN and the US in visibility.

The experts and focus group participants see the EU primarily as the trade partner to Korea (see also the "Economy" segment of this chapter) and the model of economic integration. They also note the potential for bilateral cooperation in fighting climate change, research, and technology development. The EU stance in international politics is mainly pointed out in the areas of direct interest to Korea. Several experts mentioned the EU Strategy for Cooperation in the Indo-Pacific as positively contributing to the EU image and presenting further cooperation between the EU and the Republic of Korea. The factors hindering closer collaboration between the EU and the Republic of Korea because of some experts is the lack of recognition of the Republic of Korea as an international actor on the part of the EU, and the EU has no interest in Korea.

FIGURE 85. EVALUATION OF REPUBLIC KOREA RELATIONSHIP WITH THE EU AND OTHER COUNTRIES

Note: based on Q3: Which of the following words best describes your country's overall relationship with each of the following countries and organisations? (n=1030)

Overall, the public in Korea accepts the EU as an important (70.6% strongly agree and rather agree, an increase from 66.2% in 2015) and trustworthy (an increase from 58.1% in 2015 to 61.9% in 2021) partner for their country. Most respondents believe the two parties should have stronger political ties (64.7%) and more intense education (people-to-people) exchanges (60%). Notably, when offered a list of descriptors possibly associated with the EU, only 22.3% of respondents chose "trustworthy". When asked directly if they think the EU is a trustworthy partner to the Republic of Korea, over 60% answered positively.

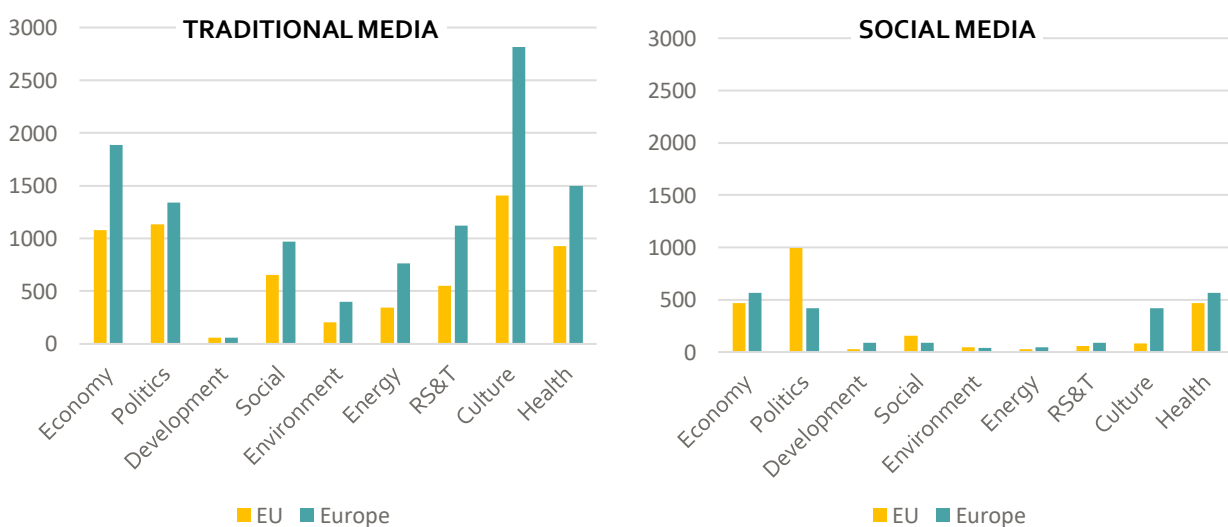
Both elite representatives and youth share appreciation for the EU's environment and climate actions and its role in the global economy and trade. Experts also underline the relevance of the EU's action in energy and the focus group in research and technology, and education areas. The focus groups participants and several experts specifically expressed the need to intensify education exchanges between Korea and the EU. The Erasmus programme is mentioned repeatedly as the programme attractive for Korea.

Compared to the 2015 study, in 2021, fewer news articles on the EU have local solid hooks. In 2015, Korean media showed sensitive responses to the Greek financial crisis and its possible impact on the country as a solid local hook for the readers. Most EU-related articles in the 2021 samples from the Korean newspapers focus directly on the EU itself and individual EU Member States reporting on the Union's COVID responses and selfishness of the EU Member States in their vaccine policies. Within the limited articles with 'local hook', Korean media paid attention to the EU's normative actions from sanctions towards North Korea or China, who violated human rights and democratic standards.

Most of the news articles in the media did not specify sources of information. The top five international sources of the EU related news in Korean media are Reuters (234 references, 43% of total number), Agence France-Presse (88 references, 16.2%), Associated Press (84 references, 15.4%), Guardian (52 references, 9.6%), The Economist (30 references, 5.5%). In the articles covering the EU as a central theme, the most cited sources were BBC (76%). Other less visible news agencies were CNN (18%), Financial Times (3%), Reuters (3%). The remaining international sources received less or no attention at all. The most prominent major news sources on the EU are Korean major newspapers’ correspondents to Europe (stationed in Paris). The prolific correspondents are Jinseok SON of Chosun Daily and Yun-Jong Kim of DongA Daily. The names of these authors might change when they finish their terms in Paris.

The qualitative analysis of the Korean traditional media articles shows the EU is most often mentioned in the articles reporting on culture (22%), politics (18%), economy (17%) and health (15%). For «Europe» culture (26%), economy (17%), health (14%) had the most coverage. For both «Europe» and «EU» development was the least noticeable thematic frame with 1% coverage for «Europe» and «EU». The qualitative media analysis demonstrates the intertwining of themes in EU reportage. Reports of British singer Elton John voicing regrets of the decline of British cultural industry due to the Brexit and British author John le Carré’s acquiring Irish citizenship in response to Brexit bind culture and politics together. The two most visible EU domestic issues in the “politics” theme are the EU performance after Brexit and Mario Draghi becoming the prime minister of Italy. The press also reflected on the EU international presence covering the EU’s responses to China’s Xinjiang-Uyghur human rights violation issues, EU sanctions against North Korea, and EU reactions to Russia’s alleged poisoning of Alexei Navalny. The EU’s possible approval of the Hyundai Heavy-Daewoo Shipbuilding merger, EU-US digital tax disputes, and ECB’s interest rates were the main issues in the economic frame. Health emerges as a significant theme in press articles due to COVID-19 Pandemic. The press in the Republic of Korea reported on EU vaccine procurement struggles (in a negative tone), Korea’s adopting digital COVID-19 vaccination passport system from the EU (in a positive manner) and vaccine production status in Europe (in a neutral tone). Like in 2015, in 2021, the uneasy relations between the EU and the UK remain a prominent sub-frame within the political issues.

FIGURE 86. THEMATIC FOCUS OF SOCIAL MEDIA AND PRESS ARTICLES REPORTING ON EU AND EUROPE. REPUBLIC OF KOREA



Note: based on automated quantitative data analysis. Includes press articles which report on the EU and Europe as a principal or a secondary subject of the article. One article can reflect more than one theme.

In Korean *social media* posts, the EU is most often mentioned with regard to political issues (42.7%). Considerable share of posts commented on economy (20.2%) and health (20.1%). In comparison to the EU, Europe was much more often mentioned with regard to culture (23.5%).

Economy and trade

The qualitative media analysis reveals four prominent themes in economic reporting on the EU in Korea - economic situation of the UK and the EU after the Brexit, the EU approval of corporate merger and acquisition deals, ECB interest rates and the EU economic interactions with the US. The Brexit related articles discuss its impact on business and economy, transfer of the European stock market centre from London to Amsterdam, and British markets in Paris were going slow due to Brexit. The press also reports the EU response to the merger between Hyundai Heavylift and Daewoo Shipbuilding, debates around the digital tax, government bonds, support for domestic businesses and corporate tax debates in the EU linking most of these to the EU COVID-19 response policies. Apart from Brexit (articles presenting negative emotive charges), most economy-related themes are reported in a neutral tone.

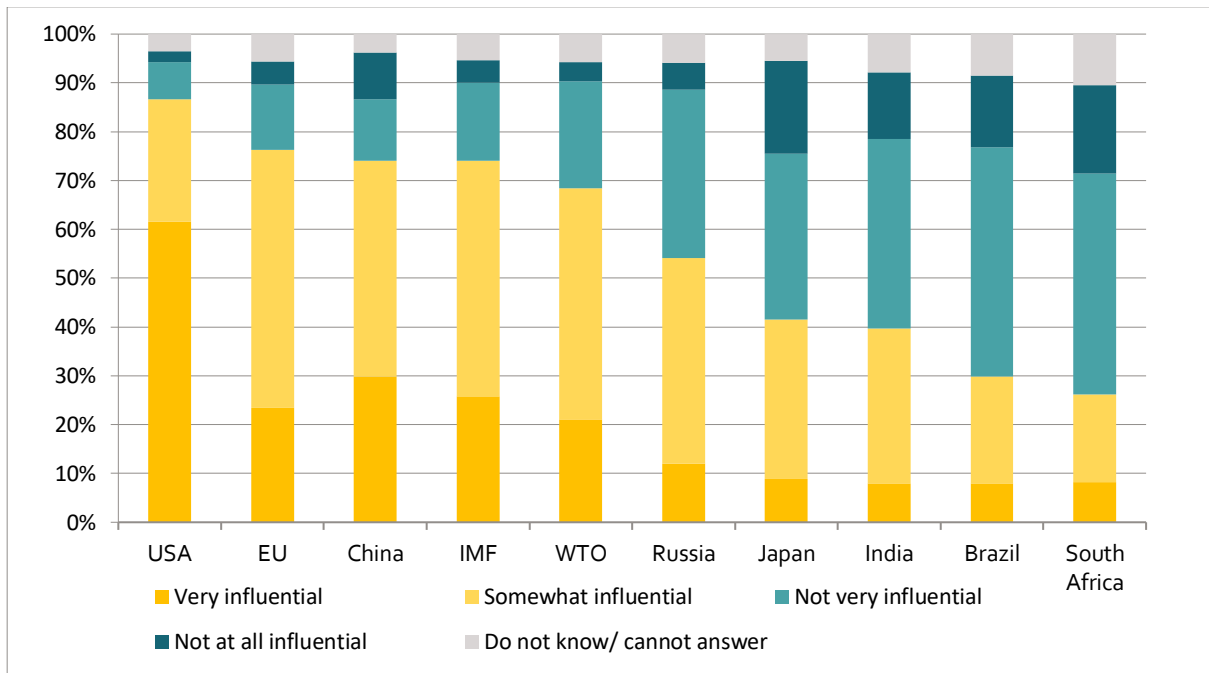
In a certain way, the crisis and its impact on the economy remains a feature of the Korean reportage of the EU. In 2015, the Korean newspapers mainly reported on the Eurozone crisis-related issues: the Greek financial crisis, ECB's quantitative easing, and the possible impact of EU crises on EU-Korea trade. The EU was portrayed as a problematic entity due to an unstable economic situation and potential consequences. Compared to the EU presentation in Korean media coverage in 2015, in 2021, its presentation has improved with presenting a higher share of the articles in a neutral tone.

In the eyes of the Korean public, the economy is the theme associated with the EU the most (compared with culture for Europe). This is confirmed by focus groups participants who name the economy among the first terms associated with the EU. Respondents accept that the EU is an important trade partner (70.5%, raise from 63.20% in 2015), foreign investors (60.9% raise from 56.8%), and strong economic and research, science and technology partner (65.1% raise from 56.5% in 2015) for Korea. In 2021, more respondents believe the Republic of Korea has to have stronger economic ties with the EU (69.7% compared to 63.8%). Less than half of respondents (46%) see the EU as an important source of food and agricultural products. A significant share of respondents (40%) believe that the EU can act for its benefit at a cost to the Korean economy (raise from 34.2% in 2015).

Students indicate that the EU is important for Korea's trade and economy. Still, the Union suffers due to internal economic polarisation (Western Europe vs Southern Europe) and the aftershocks of the Eurozone crises. Experts generally see the EU as an important actor with a positive impact stemming from the size of its economy and the prestige of the trade partnership with the EU. Experts repeatedly mention the EU- the Republic of Korea FTA as a turning point in bilateral relations and the solid basis for bilateral economic cooperation. They notice the fact that Korean companies (Samsung and Hyundai) successfully entering the EU market. Several experts mention the EU economic integration as a formerly attractive model for regional cooperation in Asia but became less attractive due to several intra-EU crises and lately due to Brexit.

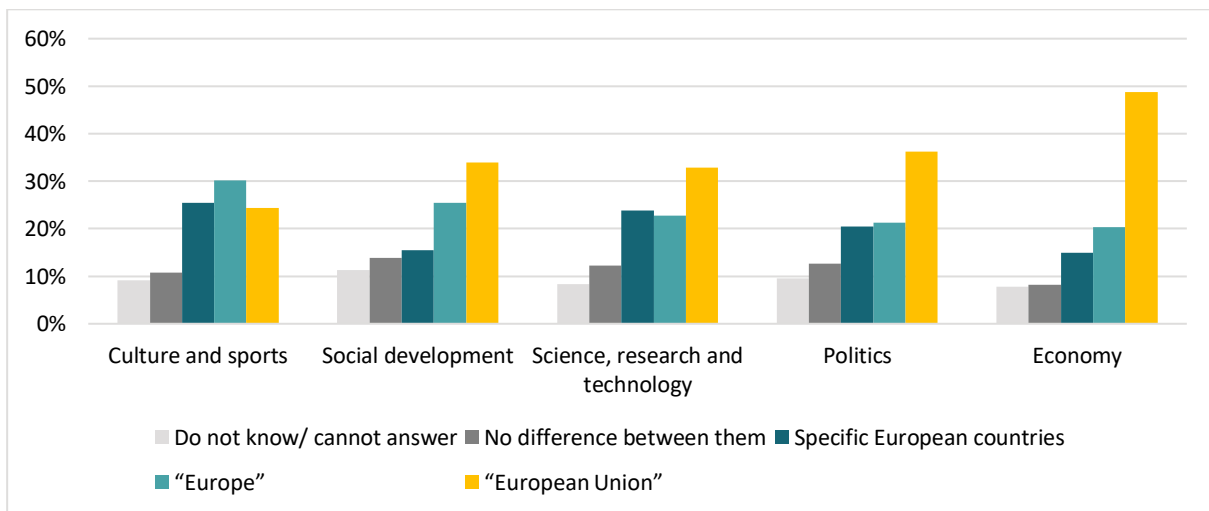
One expert mentions the EU digital tax and the policy towards the international digital companies as possible models to adopt by Korea.

FIGURE 87. EU INFLUENCE IN GLOBAL ECONOMIC AFFAIRS COMPARED WITH COUNTRIES AND INTERNATIONAL ORGANISATIONS IN REPUBLIC OF KOREA



Note: based on the answers to Q22: Some people think about Europe, whereas others think about the European Union when talking about economy, politics, culture, sports and other areas. In your case, which term – Europe or the European Union - comes to your mind first when you think about the following subjects? (n=1030)

FIGURE 88. ASSOCIATION OF DIFFERENT AREAS TO THE EU VERSUS EUROPE. REPUBLIC OF KOREA



Note: based on the answers to the survey Q6: In your view, how influential, if at all, in global economic affairs are the following countries and organisations? (n=1030)

**Please note that in 2015, this question was accompanied by a chart in a different format under the section "Research, science and technology". The wording and answer categories used in this question have changed in 2021, making it inappropriate to conduct historical comparisons.*

Politics

Korean newspapers tend to report the EU's up-to-date political news (such as EU MS leadership changes) and the EU actions relevant for the Republic of Korea like sanctions against North Korea. Brexit remains the prominent point of interest for the Korean press in 2021 as in 2015. In 2021 Brexit related articles discuss, in particular, Brexit's impact on Northern Ireland. The Brexit theme also arises in articles reporting on UK sanctions against China over its Hongkong policy. Other EU related news materials include Mario Draghi election as Italy's new prime minister.

Compared to 2015 in 2021, the degree of negative EU coverage in Korean press decreased. The Brexit related coverage features negative tone while other issues are covered in neutral or positive manner. Notably, politics is the sphere with almost equal mentions in the EU-related traditional media articles and social media posts (both based on qualitative analysis).

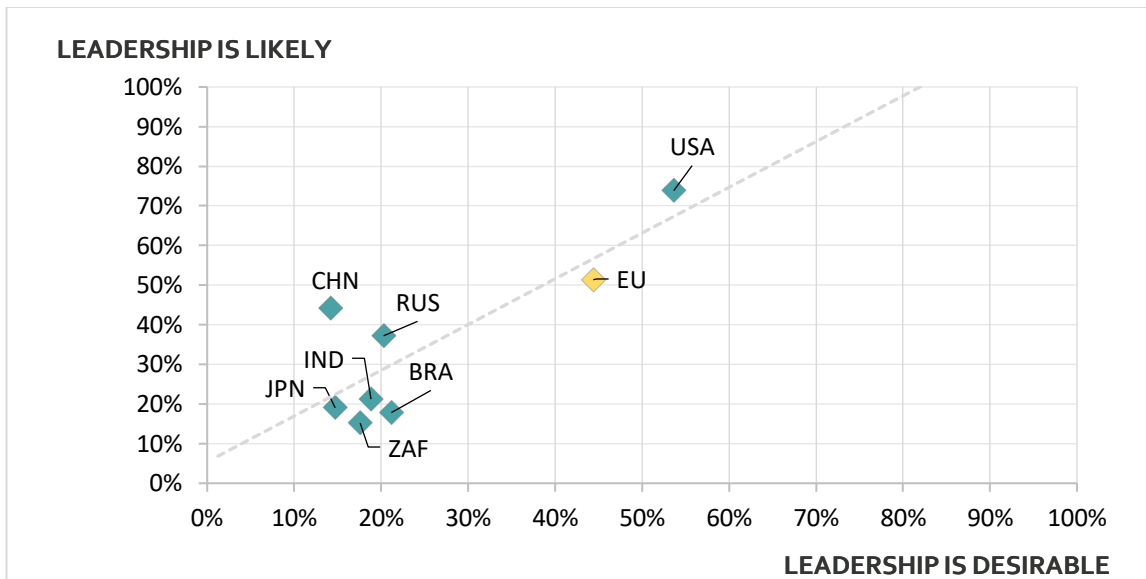
Korean public sees the US as the most desirable and likely global leader. Korean public declares the high desirability (54%) and likelihood (74%) of the global leadership. The EU follows the US as a possible global leader but with a considerable lag. In 2021 44% of respondents in Korea see its global leadership as desirable and 51% as likely (compared to 48.6% and 43.5% in 2015). The US is perceived as the most potent actor in maintaining global peace and stability (85%) Lagged by the UN and the EU (77% for both, a slight decrease from 79% for the EU in 2015). Other actors seen as playing an important role in maintaining global peace and stability are China and Russia (63% for both).

The EU performance in most of different domains on global scene is perceived positively by half or less of the respondents in Korea. Over 50% of respondents see the EU as an important actor in fighting the climate change (56.4% increase from 44.5% in 2015), support for regional development (52.4% increase from 46%) and support for media freedom (51.3%, increase from 48.6%). EU activities in peace keeping and foreign policy are seen positively by 49% of respondents (at level with 2015). The EU lowest evaluated EU performance is in support for developing countries (36.6% of respondents see the EU role as very good or rather good, increase from 30.6% in 2015), dealing with refugees and displaced persons (35.5%, increase from 23.3%) and military operations (33.5%, increase from 29.7%).

In 2015, the experts suggested the EU's importance as an international actor was based on its values and soft/normative power. Experts noted the EU activity in promoting the need for human rights protection in North Korea. They also depicted the European integration project as a successful model for the Asian countries. In 2021, experts pay attention to specific EU policies as EU sanctions against North Korea, EU Strategy for Cooperation in the Indo-Pacific, and EU perceived stance as the possible intermediary in US-China tensions. The experts generally perceive the EU position in this area positively but believe it to be unknown to the public in Korea. One expert points that Koreans did not fully recognise the EU regional security performance except for sanctions against North Korea. The experts and the focus group participants recognise the policies aiming at fighting climate change as a fruitful point of cooperation between the EU and the Republic of Korea.

Despite such perceived EU strengths, all the experts believe that the US is an ultimate leading global actor and has the most importance for Korea both as a security and economic partner. The EU is seen as an international actor with decreasing power – due to Brexit and further growth of other actors. One expert noticed that due to the lack of internal cohesion (cultural and political), the EU seems to be at risk of destruction due to any external shock. Focus group participants share the opinion of the US as a global political leader and the EU lagging behind it. They name Brexit and the EU's fight against climate change as the main issues of interest among the EU-related political matters.

FIGURE 89. DESIRABILITY VS. LIKELIHOOD OF EU GLOBAL LEADERSHIP COMPARED TO OTHER ACTORS. REPUBLIC OF KOREA



Note: based on Q4: How desirable is that each of the following countries and organisations take a strong leadership role in world affairs? And Q5: how likely or unlikely is it that each of the following countries and organisations will take a strong leadership role in world affairs five years from now? (n=1030) The horizontal axis presents the sum of “Very desirable” and “Somewhat desirable” responses to the Q4. The vertical access presents the sum of “Very likely” and “Rather likely” responses to Q5.

Climate and environment

The press coverage of EU performance in environment protection is low: 3.2% of the theme mentions in the quantitative analysis dataset. There are only three mentions in articles covering the EU as the principal subject. The environment-related issues covered by the press are the EU carbon emission reduction policy and related governance issues.

Korean public opinion sees the EU as an important actor in the fight against climate change and protecting the environment but lagging other international actors. As in international development, the US is seen as the most important actor in this sphere (84%), closely followed by the EU and UN’s importance (79% and 78% respectively). One of the experts mentions that after the presidential elections in the US, its interest and role in fighting global climate change has increased. The opinion of the EU role in fighting climate change is not different to 2015. The part of China and Russia (76% and 71%) are also seen as important.

Experts and youth differ in their perception of the EU’s performance in fighting climate change. Experts pointed to EU performance in achieving the Paris Agreement and recognised its impact on the Republic of Korea. Focus group participants believe that the EU has been passive in climate change compared to the US after the recent presidential elections. The students declare the lack of knowledge of the EU action in the field of fighting climate change.

Experts also mention the EU Green Deal as a potentially successful policy combining fighting climate change with the post-COVID-19 economic stimulus measures.

Energy

Overall, the knowledge and interest of the EU performance in the energy domain is limited in Korea. The press coverage of this sphere is diminishing (2 mentions in articles presenting the EU as a principal subject and 5% in the dataset for quantitative media analysis). Overall visibility in the energy sphere is related to the EU climate action.

Experts and youth declare limited knowledge about the EU's energy-related affairs. Experts are inclined to perceive the EU as a leader of sustainable energy (clean and green energy and EU Green deal etc.) and comment on the possibility of the research cooperation with the EU in the energy sphere. One expert mentions the EU nuclear policy as a subject for the civil society organizations in Korea to study. Some respondents in a focus group (youth) mention the EU's sound performance in hydraulic fracturing of shale gas.

Research, Science and Technology

The number of press articles covering the EU performance in science, research and technology is limited (5 mentions in the articles covering the EU as the principal subject and 8.5% in the dataset for quantitative media analysis). The press coverage concentrates on COVID-19 vaccine development. The prominent examples are Germany's BioNTech collaborative COVID-19 vaccine production with Pfizer and the EU's concerns about Astra-Zeneca vaccines' side effects. The press also reports on the EU's decarbonisation effort, connected to the EU's environmental performances. Other RS&T related themes in media coverage are the technologies related to the energy transition, and IT was the visible theme.

In 2021, 65% of respondents in Korea see the EU as an important partner in science, research and technology (56% in 2015). In 2021 relatively more significant share of the respondents associate the domain of RS&T with the EU than Europe (33% compared to 22%), representing a change compared to 2015 when 35% of respondents associated RS&T with Europe compared to 27% with the EU.

Similarly to development and climate action, the public in Korea sees the US as the global leader in research, science and technology, followed by the EU. Eighty-four per cent of respondents perceive the role of the US as "very important" or "somewhat important" (75% for the EU). China and Russia follow the EU, with 60% of respondents seeing their role in research and development as very or somewhat important.

Experts mention the EU actions in the sphere of digital security as a promising sphere.

Development and assistance

EU-related developmental themes are marginally present in the quantitative analysis media data set (0.93% of all the theme mentions) and missing in the qualitative analysis dataset.

In the eyes of respondents in Korea, the EU development performance is overshadowed by the UN and the US. The Korean public sees the US and the UN as the most important international development actors (85% and 80% respectively see them as very or somewhat important). The role of the EU is seen as slightly less important (77%). Some experts in Korea have mentioned the amounts the EU dedicates to official development assistance abroad related to EU values.

Social

Similarly to developmental issues, the EU's performance in the social sphere was not among the most reported themes in the Korean press. Although in the quantitative analysis media data set, 10% of articles related to social thematic frame, only one piece referred to social issues in the media materials that present the EU as a principal subject.

In the public opinion eye, the EU performance in the social sphere has improved between 2015 and 2021. The most positively evaluated EU social development indicators are overall quality of life (63% of

respondents see it as very good or fairly good, an increase from 54.5% in 2015) and level of education (62%, increase from 53% in 2015), climate change activism (55% in 2021 compared to 45.4% in 2015), social justice and solidarity (54% in 2021 and 53% in 2015) and equality between men and women (53% both in 2021 and 2015) (For each of those areas in over 50% of the respondents pointed out either very good or fairly good in 2021 marking the increase in appreciation level from 2015. The feeblest EU performance is seen in the integration of migrants and refugees (only 37% of respondents sees it as very good or fairly good in 2021, an increase from 26.5% in 2015), eradication of poverty and reducing income inequality (40% see it as very good or fairly good, 34% in 2021).

The most prominent theme among the youth respondents was the level of EU education. Students declare their interest in visiting Europe/EU to get a high-quality education through student exchange, earning postgraduate diplomas etc. The experts with study experience in the EU mentioned the Erasmus program as one of the most visible EU policies in the social sphere. One of the experts speculated on the possibility of creating the Erasmus program for Asia. Experts mention the necessity to extend teaching most spoken European languages (French, German and Spanish) to facilitate education and research contacts.

Culture

The EU's visibility in the cultural theme was noticeable in dataset of articles collected for qualitative data analysis but limited in the articles which portray the EU as the principal subject (3 of 136 articles). The culture is discussed in the press indirectly in relation to political issues.

EU culture and lifestyle are among the few spheres where the EU leads in a public opinion poll in the Republic of Korea. Sixty-eight per cent of respondents think the EU culture and lifestyle are very or somewhat attractive (66% believe that of the US). Most aspects of the EU cultural performance are seen as "very good" or "fairly good" by more than 50% of the public. The top five fields were arts (65% in 2021 compared to 67% in 2015), 'monuments and museums' (65% in 2021 and 2015), luxury goods and clothes (62% in 2021 and 2015), music (62% and 51%) and modern architecture and design (64% in 2021 and 2015). However, a significant share of respondents (between 5% and 8%) do not have any opinion of the EU performance in culture and lifestyle. In 2015, almost half (48.9%) of respondents in the Republic of Korea associate culture with Europe compared to just 18.5% with the EU and 22% did not see the difference. In 2021, the EU attracts higher share associations with culture and sports (24% compared to 30% for Europe, 25% of respondents do not see the difference).

Health

Due to the COVID-19 pandemic, the visibility of the EU in the media was driven by its response to the global pandemic. The health theme is more visible in the articles presenting the EU as a principal subject (47 mentions) than in the media dataset collected for quantitative analysis (14%). The most prominent theme in the Korean press was the EU member states' responses to the pandemic presented in a neutral tone. However, the health theme featured a substantial number of articles presenting the EU in a negative tone. In part due to this reportage, more than half of the public opinion survey respondents perceive the EU's importance in global health and medical research and believe the EU has demonstrable weaknesses as an international actor. Experts perceived the EU's importance due to its potentials in forming a platform of global public health cooperation and its leadership in medical research (vaccine production). A media expert believes that the Digital Vaccine Passport introduced by the EU can be a helpful system to support free movement in the global pandemic. An expert representing government institution mentioned that the EU had demonstrated capability by securing vaccines for its member states and citizens. Also, the media expert noticed the financial capacity of the EU to allocate the long-term bonds for dealing with its relevant crisis. The EU is perceived as an actor that has improved its crisis management capacity and can set a model to follow by other countries.

Youth respondents viewed the COVID-19 as one of the EU’s consecutive crises after Brexit, the refugee and Eurozone crises. One respondent declares that Europe’s public health system was not sufficient to address the global health crisis. Another respondent believes that EU member states are selfish in reserving their vaccines and should share the vaccines with other nations and increase the EU’s global impact.

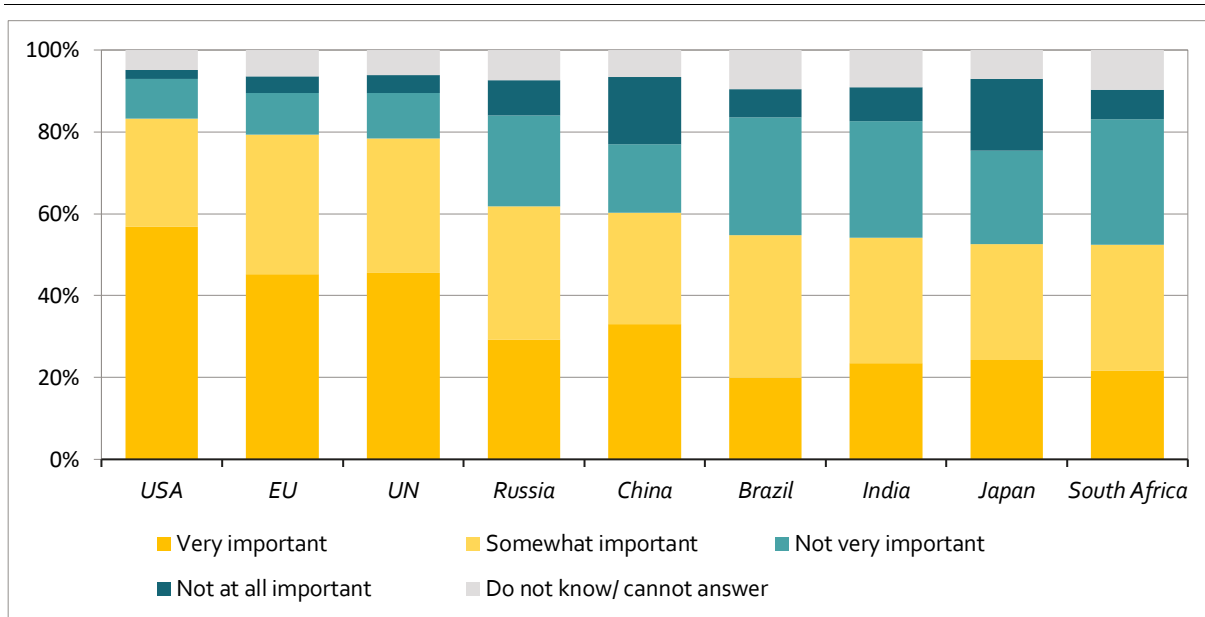
Continuity and change behind actorness

The Korean public continues to see the EU as an important and trustworthy partner for the Republic of Korea in all areas but still overshadowed by the e US. In the area of economic performance and trade the EU is also perceived as an actor lagging China, IMF and the US. The perception of the EU in Korea is continuously more favourable than the global actors from Korea’s region: China, Japan and Russia. In 2021, experts still believe that the EU has its soft power, but it has its potential in security and military cooperation.

In 2015 and 2021, the Korean public continuously sees the EU development actorness as less important than the US and the UN actorness. Koreans perceive the EU’s development actorness more positively than other countries and international institutions for comparison. In 2021, the experts and youth focus group participants restrictedly perceive the EU’s developmental actorness. In environmental actorness, the EU’s importance and reputation has improved over the research period. In 2015, the EU was regarded less important than the US and the UN. In 2021, the EU is considered more important than the UN but less important than the US. Also, the EU’s roles in fighting against climate change and protecting the environment are also regarded more positive than the US and the UN. In science, research and technology areas, the Korean public constantly perceives the EU as an important actor but not the US. The EU’s culture and lifestyle were the most attractive to Koreans. In 2015, the EU’s culture and lifestyle were as attractive as the US’ for the Korean public. In 2021, the EU’s culture and lifestyle are the most attractive to Koreans.

1.10.4. The EU as a norm-setter

FIGURE 90. PERCEPTION OF THE IMPORTANCE OF EU, OTHER ORGANISATIONS AND COUNTRIES IN GLOBAL HUMAN RIGHTS PROMOTION. REPUBLIC OF KOREA



Note: based on Q11: In your view, how important, if at all, a role do each of the following countries or organisations play in promoting and defending human rights worldwide to protect human dignity, freedom, equality and solidarity? (n=1030)

In human rights promotion, public opinion in Republic of Korea sees the EU as an actor equal to the UN but lagging the US. Although the combined share of respondents who see the US, EU and UN as significant human rights promotion actors is almost equal (at 80%), the share of respondents who see the US as a crucial actor is under 60%. In comparison, for the EU and UN the percentage is over 45%. In 2021 Korean public opinion of the EU as a global norm setter has slightly improved compared to 2015 (77% of respondents believed the EU to be an important actor, including 35% - very important).

Notably, just over 60% of Korean respondents believe that the EU shares the same democratic principles as the Republic of Korea, and over 55% believe the EU is a good example for Korea in promoting equality between women and men. Not more than 25% of respondents in Korea believe that their personal values are similar to the EU values, but between 50% and 39% of respondents believe their values to be more or less similar to those of the EU. Given Korean respondents, the EU values closest to their personal opinions are views on liberty (72%, similar to 2015 with 71%), respect for human dignity (69.6% in 2021 and 69% in 2015), democracy (69% in 2021 and 2015), respect for human rights (66.5% in 2021 and 67% in 2015), equality (66.1% in 2021 and 67% in 2015) and the rule of law (63.8% in 2021 and 62% in 2015). Most experts affirmed that the EU plays a significant role in global democracy and human rights promotion during interviews.

The experts note the EU reaction to the human rights violations in China and sanctions towards North Korea as the cases presenting the EU normative power. One expert mentioned the EU support for Korea's LGBT movement. Another expert notes the EU internal debate on the refugee accommodation and the unwillingness to share the burden as the factor undermining the EU normative power.

Continuity and change behind the perception of EU as a norm-setter

In 2015 the themes of peace, democracy, good governance, and anti-discrimination promotion were the principal elements of the EU image as a norm-setting actor.

Focus group data suggested that students did not note the EU norm-setting role compared to the US or the UN. The public opinion data show that Korean public perceive the UN as the most important actor in human rights promotion on the global stage despite its close partnerships with the US and the EU.

In 2021, the EU reactions to individual freedoms limitations in Russia, human rights violations in China (Xinjiang Uyghur) and North Korea are the prominent elements of the EU's norm-setting actions covered in the news media sample. The EU's norm-setting role was challenging to explore from the focus group interviews since the focus groups participants have limited exposure to EU related debate. For those students who do not major in cognate majors (e.g., international studies etc.), exposure to information of EU performance in global norm-setting is even lower.

1.10.5. Continuity and change

In 2021 and 2015, the economy and trade are seen in the Republic of Korea as the most relatable aspects of the EU. The EU perception in the country is hindered by the fact that the EU is not actively involved in the peace process on the Korean peninsula and is overshadowed by the US in its international standing. However, the EU actions such as sanctions against North Korea and stance in relation to military coup make it more relevant to the public and elites in Korea. International trade and economy continue to be perceived as the principal strength of the EU. This focus has implications for the EU perception in Korea. With expectations of the continuous economic growth by China, there is an expectation of the EU relative global importance decrease in the midterm perspective.

While Europe is perceived positively overall, there is a lack of understanding of how the EU relates to Korea and Koreans in “everyday life”. However, Koreans are more inclined to prefer the EU to Korea’s regional powers (China, Japan and Russia). The EU Delegation in Korea attempts to reach out to their key audiences by diversifying the themes and channels of interaction, but this requires more staff working at the EU Delegation and researching their target audiences’ interests. The key obstacle is not the lack of information about the EU but the lack of interest among the public.

The literature suggests that media reportage remains the principal factor impacting the EU image in Korea. The EU focused reportage in Korean media has reduced in 2021 compared to 2015 due to the COVID-19 pandemic, which for long months has overtaken other topics in international news coverage.

The press coverage of the EU response to the COVID-19 pandemic created a mixed image of the EU in the Republic of Korea. It demonstrated the EU vulnerabilities (diverse national COVID-19 response policies, lack of internal EU cohesion at the initial stage, troubles with public health management) but also its potential in science and high-tech industries (vaccine development and production) as well as international negotiation capabilities (managing to secure sufficient vaccine supply contracts).

Similarly to COVID-19 press coverage, the press coverage of Brexit in Korea has reinforced the perception of EU vulnerabilities (lack of internal cohesion and solidarity inside the EU).

At the same time, compared to 2015, new themes appear in the public representation of the EU in Korea. The media published positive reportage of the EU efficiency and effectiveness of its climate change responses, vaccine development and normative actions towards North Korea (human rights promotion). However, these themes still do not dominate the EU public image in the Republic of Korea. The negative images of the EU in Korean press coverage are related to Brexit and EU-UK relations and COVID vaccines related controversies.

The EU image shared by different individuals can be based on very fractured information. Some focus group participants have a negative impression of the EU based on Brexit-related reportage. The others report a positive image related to the EU peacefulness and eco-friendliness.

In addition to trade and economy (the number one domain), the opinion makers and focus group participants declare positive opinions of the EU performance in the areas of environmental protection and fighting climate change, science and technology, education (focus group participants) and energy (experts). Expressing their opinions regarding EU activities in other spheres, the interviewees present predominantly neutral opinions of the EU. Public opinion data indicate health governance as the area where the EU performance was less impressive.

1.10.6. Recommendations for EU public diplomacy

Media analysis, public opinion polls, expert interviews and focus groups reveal several latent challenges for EU-related public diplomacy practitioners in Korea. First, the Korean public is not likely to be interested in the EU unless there is a close personal connection. Given the stability of the EU-Korean relations ensured by the EU- Korea Free Trade Agreement and Agreement, establishing a framework for the participation of the Republic of Korea in European Union crisis management operations, the bilateral relations at present do not provide too many points of interest for the public.

Second, in the opinion of the Korean public and decision-makers, the US remains the dominant global actor and most trustworthy partner for their country. This status is reflected even in the number of social media followers of the US and the EU diplomatic representations in the Republic of Korea (13800 Instagram followers for the US embassy compared to 3000 for the EU Delegation). Electronic media – television and online media - remain the primary source of information on the EU for the Korean public. Its primary focus is on economic issues, especially trade relations (FTA) and multiple crises in the EU.

To overcome the narrowness of the Korean public interest for the EU, we recommend promoting the areas of the common interest for the EU and the Republic of Korea in the EU public diplomacy activities. We recommend referring to the local agenda and priorities in the EU public diplomacy activities in the Republic of Korea and conducting regular studies of the popular sentiments and monitoring the response to the EU Delegation as the tools of raising interest to the EU in the country.

At present literature on EU perception in the Republic of Korea points to a deficit of systematic insights into the perceptions of the EU among the public and influencers/decision-makers. Establishing consultation mechanisms and engaging experts in relevant fields (academic, civil society and NGO experts) and decision-makers (Korean ministries of unification and environment) can enhance understanding of Korean public agenda priorities. Bilateral advisory meetings can foster opinion exchanges between experts from both Korea and the EU. On the political level, more frequent direct bilateral contacts (summits, ministerial-level meetings, and working-group level talks) can help maintain bilateral interest and better understand the partners' agenda.

Results of the focus groups with Korean students conducted for this study provide several suggestions for the future activities addressed to youth. Expectations towards the EU differ among the students. The students less knowledgeable about the EU would welcome the activities in the spheres environment and education. Some participants find that EU environmental actions are not sufficiently visible and EU policies in this area are not distinct enough. Students following international relations and global studies courses believe the EU to be influential in the areas of politics, development assistance, environment, social issues, and education, while students from civil engineering perceive the EU to be more influential in the areas of economy, energy, science, technology, and research and would expect the activities in these areas.

At present Korean students admit that their perceptions of the EU and its policies are generic and shaped by the national media, which suggests a lack of recognisable alternative sources of information. We recommend considering the broader engagement of experts with local specific knowledge for developing public diplomacy strategies and social media promotion action plans to address this issue. Promotion activities in social media should be tailored to target various audiences using various social media platforms, including developing age and platform-specific messages, and supporting video or graphic material.

Results of the public opinion poll suggest that apart from appreciation of the EU as a tourism destination, the Korean general public has a favourable opinion of the EU performance in the spheres of new technologies development, science and research, and green technologies and sustainability. Cooperation with the EU in these areas will be welcomed by the public. It also presents the interest for the Korean decision-makers. In June 2021, the Ministry of Science of the Republic of Korea and the European Commission held a meeting to discuss the 5G wireless technology standardisation. The promotion of these developments is recommended as the theme for the EU public diplomacy.

The COVID-19 pandemic attracted the attention of Korean media to EU performance in public health management and medical research, and vaccine production. The Korean media depicted the EU as a leader in vaccine production (Oxford-AstraZeneca and Pfizer-BioNTech) and a standard-setter in health and safety (EMA's revision on AstraZeneca Vaccines). The Korean media depicted the EU as a leader in vaccine production (Oxford-AstraZeneca and Pfizer-BioNTech) and a standard-setter in health and safety (EMA's revision on AstraZeneca Vaccines). Thus, in the short-term perspective, we recommend initiatives in vaccine production and public health management cooperation as a productive theme for public diplomacy.

For the mid-to-long-term public diplomacy action, we propose politics, environment, education and culture as themes for EU public diplomacy activities in the Republic of Korea. These themes will reflect

the interest of the key Korean audiences – decision-makers and youth and will conform with the general public's views.

Theme Politics

Promoting normative agenda

The EU is seen in the Republic of Korea as trustworthy and important partner, but it is overshadowed by the US, which is seen as a key player in securing the stability of the Asia Pacific region. The conclusion of the AUKUS pact in September 2021 has also stressed the ambitions of the former EU member – the UK – to establish its influence in the region. Public diplomacy actions organised around the theme of politics and the normative actorness of the EU would raise awareness of the EU normative agenda and understanding of the EU as global normative power actor. Acting in the sphere promoting normalization on Korean peninsula and the climate change prevention will be the most relevant sub-themes for public diplomacy action.

Policy aim: Emphasising the EU's global norm-settings (values, democracy and human rights promotion) and environmental leadership (combating against the Climate Change, and Paris Climate Agreement implementation in particular).

Practice-oriented suggestions:

- Establishing and maintaining the network of contacts within academia, civil society and state institutions authorities (e.g. Korean ministries of unification and environment) for exchange of opinions and developing possible bilateral cooperation agenda.
- Considering public information campaigns publicising EU global norm-setting priorities for the Korean public.

Policy aim: Raising the the EU profile as an international actor in the eyes of Korean public.

Practice-oriented suggestion:

- Maintaining the discussion, exchange of opinion networks with local experts to fit the public diplomacy action to the home political agenda in the Republic of Korea
- Benchmarking successful public diplomacy actions in the Republic of Korea implemented by the USA and other successful diplomatic actors (including social media practices).

Target audiences and partners:

National authorities, academia, policy experts' community, civil society.

Theme Environment/Climate Change

The EU's environmental action is perceived positively by the Korean public. The EU's role in fighting climate change impact is seen as more significant than the role of the US, creating ground for climate-related public diplomacy action.

Short-term

Policy aim: Intensifying bilateral cooperation under the Paris Agreement framework.

Practice-oriented suggestions: Reviewing the status quo of bilateral actions for climate change and establishing MOU (Memorandums of Understanding) between interest groups: ministerial levels (DG CLIMA and Korean Ministry of Environment) and working-level (think tanks from both sides).

Policy aim: Establishing contacts with potential partners to intensify EU-Korea environmental research cooperation.

Practice-oriented suggestions: expanding the research funds opportunities to the appropriate consortia of the EU and Korean institutions and providing more opportunities for the institutions outside the Seoul area (e.g. Busan or Daegu) to join the research cooperation.

Medium-term

Promoting research and development academic and industrial cooperation between Republic of Korea and the EU in appropriate areas (environmental, engineering etc).

Policy aim: Establishing the technical alliances to promote the EU's visibilities among the Korean scientists, engineers, and other relevant technicians.

Practice-oriented suggestions:

- Holding regular meetings between EU Delegation to Korea and the relevant technical experts (e.g. researchers and technicians). Supporting existing co-operation dialogues and co-operation mechanisms with the supports of experts.
- Offering internship opportunities for Korean university students. The EU could support Korean Ministry of Education in promoting the relevant educational programmes for Secondary students about the issues of climate change and environmental protection.

Target audiences and partners:

National and local authorities, academia, civil society, public, youth, industry.

Theme: Education

As confirmed by this study, education is one of the key themes of interest for the Korean youth. EU Delegation to the Republic of Korea has operated an excellent public diplomacy programme by implementing diverse activities associated with universities that benefit from fundings under the ERASMUS+ program. However, at present, most of the programme beneficiaries are located in Seoul and its neighbouring region. We recommend that Delegation considers geographical expansion of its public diplomacy actions to cover other regions or provinces in Korea, including approaching universities.

Policy aim: Expanding the bilateral education cooperation network.

Practice-oriented suggestions:

Supporting the eligibility of Korean education institutions to Horizon tools (ERASMUS+) in the areas of international studies (IR and politics). Organizing consultations events from these institutions to add more helpful potential supporters.

Contacts and engagement with younger cohorts can be increased via additional education opportunities in the EU and the EU related internship opportunities, including in the EU institutions, EU-based multinational companies, EU Centres in Korean universities. Support for establishing of the European/EU alumni associations in Korea can help to spread information about the existing opportunities.

Contacts with Korean academic and think tank circles can benefit from grant schemes for specific research projects, special events and publications.

Target audiences and partners:

Educational authorities of the Republic of Korea, Universities networks, youth.

Theme: Culture

The study results indicate the Korean public highly appreciates the European culture. However, the cultural heritage seems to be given insufficient attention in public diplomacy activities. Apart from promoting the EU cultural heritage, stressing culture as a theme of public diplomacy in Korea will also benefit by recognising the Korean culture and its perception in Europe (including pop culture and cinema) and cultivating the bilateral links in this area.

Policy aim: Expanding the support network for the EU cultural public diplomacy in Republic of Korea.

Practice-oriented suggestions:

- Increasing the number of cultural events dedicated to promoting the various cultural domains and aspects of the European lifestyle (fine arts, monuments/museums, luxury goods, music, and architecture/designs. For the fine arts, the EU could invite interested artists to create artistic pieces about the EU.
- Supporting the events such as EU-related fashion shows collaborative performances involving EU and Korean musicians (opera singers and concert instrumentalists) can also have traction.
- Establishing contacts with the relevant academic associations in the field of European studies (social sciences), literature (humanities), fine arts and music.

Medium-term

Policy aim: Strengthening cultural ties between Republic of Korea and the EU.

Practice-oriented suggestions:

- Offering the students pursuing fine arts and music studies opportunities to study in Europe (conservatory and design schools), including scholarships and other funding possibilities. Spreading information about EU-based music or other artistic competitions (ensuring mutual strengthening of the education and culture themes.)
- Developing academic exchange programs and dual/double degrees programs between EU and Korean art and music institutions. Considering forming and promoting EU-related alumni societies in the Republic of Korea (EU fine arts, music alumni associations in Korea).

Target audiences and partners:

Youth, creative industries professional networks, public.

Overall communication recommendation:

Given the role of the traditional media as the source of the EU related information in the Republic of Korea the two directions of work are recommended:

- Direct engagement with Korean media professionals, offering projects which will help more journalists to familiarize themselves with the EU agenda and points of common interest in EU-Korea bilateral relations.
- Developing dedicated channels of communication focused on the needs and interests of the young audiences. Considering support for information activities informing the Korean youth of education and volunteering opportunities in the EU.
- Developing and maintaining relations with the European networks in Korea, including the networks of European university alumni, creative industries networks, networks of EU citizens residing in the Republic of Korea.

1.11. Russia

This Country Chapter presents a synthesis of the Russia-specific findings of traditional and social media analysis; interviews, focus groups and public opinion poll that were all conducted in the framework of this study. The structure of the chapter follows the logic of the research design. We present the main findings for Russia according to indicators guiding the 2021 Study: visibility, actorness and local resonance, and norm-setting. We also discuss findings according to the themes analysed in this study: economy and trade; political issues; development; social issues; environment; energy; science, research and technology; culture; education and health. The penultimate section looks at the drivers behind perceptions of the EU and Europe in Russia. We conclude the chapter with recommendations for the EU's public diplomacy in Russia.

Summary

Compared with 2015, the EU is more visible in Russia in 2021, but opinions of it 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 EU foreign policy, human rights, health, the environment – and specifically, sanctions against Russia. The EU is also visible in the news about COVID-19 vaccines certification and EU green energy/climate policies (notably the Green Deal). The media are neutral or positive when reporting matters other than EU-Russian political relations. The press and some experts present the EU as arrogant, applying double standards by ignoring its faults on political and normative issues. 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.

1.11.1. Sample

Public opinion

The online survey was coordinated and conducted by PPMI through an online panel provided by *Syno International*. The respondents in Russia were surveyed in Russian. Data collection took place from 28 April to 16 May 2021. The sampling for the survey was designed to be nationally representative by age, gender and region. Respondent profiles in Russia were established based on data from the World Bank World development indicators database³⁵ and the Russian Federal State Statistics Office³⁶. The survey included a total of 1,114 individuals aged between 15 and 64 years old³⁷.

Media

³⁵ World Bank World development indicators database: <https://databank.worldbank.org/source/world-development-indicators>

³⁶ Russian Federal State Statistics Office: <https://eng.rosstat.gov.ru/>

³⁷ Detailed public opinion survey data are available in Annex II of this Report – Comparative public opinion survey report.

The quantitative part of the media analysis evaluating the general trends in a large press media sample was carried out by PPMI. Five popular prestigious dailies *Rossiyskaya Gazeta*; *Kommersant*; *Izvestia*; *Nezavisimaya Gazeta*; *Novaya Gazeta*, and one business newspaper *Vedomosti* were monitored from 1 February to 30 April 2021. The *Factiva* repository was used to aggregate content from both licensed and free sources, and in-house data processing was applied to produce the results.

Two separate datasets in Russian language were collected over the period of observation – “EU” (1,125 articles) and “Europe” (1,532 articles). Search terms for the dataset “EU” are: “European Union”, “EU”, “European Commission”, “European Parliament”, “Court of Justice of the European Union”, “EU presidency”, “EU Council”, “European Council”, “Council of the European Union”, “Eurozone”, “European Central Bank”, “European Investment Bank”, “European Medicines Agency”. The search terms for the dataset “Europe” are “Europe”, “European”, and “Europeans”. The search terms for “EU” and “Europe” datasets consider both plural and singular forms as well as possible grammatical forms of the search terms in the local language. Europe dataset excludes articles containing any of the “EU” dataset keywords.

The qualitative media content analysis of the news that reported the EU as a major focus/theme (49 articles) was designed, supervised, and coordinated by the experts from the Public Diplomacy and Political Communication Forum (PD-PCF), University of Canterbury (UC), New Zealand, and conducted by the Country Expert trained by the PD-PCF UC. PPMI collected the media sample using the search engine from two prestigious newspapers *Rossiyskaya Gazeta* and *Kommersant*, and one business newspaper *Vedomosti*, for country expert to conduct an in-depth qualitative analysis. The timeframe of observation remained the same as for the quantitative and social media analyses. Experts analysed the EU image created by applying elements of content, cognitive and critical discourse analyses.

Social media

PPMI carried out the social media analysis. The data collection process was automated using the online social media monitoring tool *Mediatoolkit*. Social media posts were collected from Twitter, Facebook and Instagram with the use of automated queries. Coverage of the EU was traced using a set of the EU-related keywords: “European Union”, “EU”, “European Commission”, “European Parliament”, “Court of Justice of the European Union”, “CJEU”, “EU presidency”, “EU Council”, “Council of the European Union”, “European Council”, “Eurozone”, “European Central Bank”, “European Investment Bank”, “European Medicines Agency”. All the keywords were additionally traced in one-word format to capture related hashtags: `europeanunion`, `europeancomission`, `europeanparliament`, `courtsofjusticeoftheeuropeanunion`, `eupresidency`, `euCouncil`, `europeancouncil`, `counciloftheeuropeanunion`, `europeancentralbank`, `europeaninvestmentbank`, `europeanmedicinesagency`. Europe-specific keywords used for filtering relevant social media posts are “Europe” and “European”. Europe dataset excludes posts containing any of the “EU” dataset keywords. The mentions were to ensure that the collected mentions originate from Russia. A language filter was set up to collect posts in English and Russian. The resulting sample of Russian social media posts collected from 1 February to 30 April 2021 includes 40,005 mentions, of which 20,617 are of the EU (67.3% in Russian) and 19,388 of Europe (51% in Russian).

Working with social media platforms, the Project Team followed each platform’s terms of use. All identifiable information of individuals from social media data remains confidential and is removed before the publication of findings. Computational analyses of the samples involve only contents from media databases’ public websites – posts that are available to general audiences. No generalised conclusions that might cause any potential harm to identifiable communities are drawn from social media analysis.

Interviews and focus groups

Interviews with local opinion- and decision-makers as well as focus groups with students were conducted by the Country Experts, with training support and supervision from PD-PCF, UC, following the approval of the UC Human Ethics Committee. As part of this study, interviews and focus groups aim to provide in-depth explanations about Russian perceptions of Europe and the EU and cross-reference the findings from the public opinion survey, traditional and social media analyses.

The interview sample includes 12 participants (4 female and 8 male), aged between 30 and 70 years old representing academia, politics, business, religious organizations, think tanks and media, based in Moscow, St. Petersburg, and Tomsk. Among the interviewees, many have acted as advisors to the government and parliament. Respondents visited numerous European countries – either on business or for vacations. All interviewees are informed of the EU, and all but two have had personal experiences with the EU. Three participants have work experience at different EU institutions or Russian embassies or trade representations in the EU Member States and the NATO representation in Moscow. Four interviewees took part in the EU academic mobility, education, or research programmes.

The focus group sample consists of 8 participants (5 female and 3 male) aged between 19 and 24 years old, including four undergraduates (3-4 years of studies), two postgraduate (master's degree) students and two university tutors of various academic backgrounds: theoretical sociology, ecology, domestic violence, economics, energy, international relations (the Middle East, the EU) and political science. Respondents visited many European countries, mainly as tourists. All have personal experiences with and are aware of the EU. Two participants have participated in exchange programmes, six have worked/studied with people from the EU/wider Europe, five have family or friends in the EU/wider Europe with whom they stay in touch.

Semi-structured, anonymous qualitative group interviews under Chatham House Rules were conducted with all EU Delegations across the 13 key partner countries. Interviews lasted between 60 to 90 minutes. The group interview with representatives of the EU Delegation to Russia was conducted on 1 of March 2021 by members of the Core Team (PD-PCF UC and PPMI) and the Country Expert.

1.11.2. Visibility

In the eyes of the Russian public, the overall visibility of the EU has increased in 2021 compared to 2015. While in 2015, about 4% of respondents answered 'Do not know/ cannot answer' to the question about how positive or negative they feel about the EU, in 2021, their share has reduced to 1.7%, which suggests higher exposure to information about the EU.

Survey respondents in Russia have a mixed image of the EU, but in 2021 their opinion of the EU have improved compared to 2015. Thirty-seven per cent of respondents see the EU as modern, 35.9% - as multicultural, and 24.5% as hypocritical. In the 2015 Study in Russia, the top three for the EU were hypocritical, multicultural, and arrogant. Compared to the EU, Japan is perceived as more modern (59.2%) and efficient (51.1% for Japan vs 18.1% for the EU), Russia vis-à-vis the EU is seen as more multicultural (62.2% vs 35.9% respectively) and strong (51.1% vs 18.7%).

Among the global actors, the US is seen as significantly more aggressive (42.9% vs 9.1%), hypocritical (31.7% vs 24.5%) and arrogant (33.5 % to 16.8%) compared to the EU.

The EU is seen by Russian public opinion as a capable actor in different spheres in the EU itself. Although the EU activities in most domains (except for space exploration and technologies) are evaluated positively by more than 50% of respondents in 2021, the share of the "fairly good" answers is bigger than "very good" for each sphere. The five most positively evaluated domains (receiving between 75% and 65% of combined "very good" and "fairly good" answers) are tourism, financial

services and banking, global trade, industrial development and development of new technologies, science and research.

In 2015 respondents in Russia were most positive about the EU's performance in the field of tourism (75.5% of respondents rated the EU performance as very good or fairly good) and the least positive in space exploration technologies (38.3%).

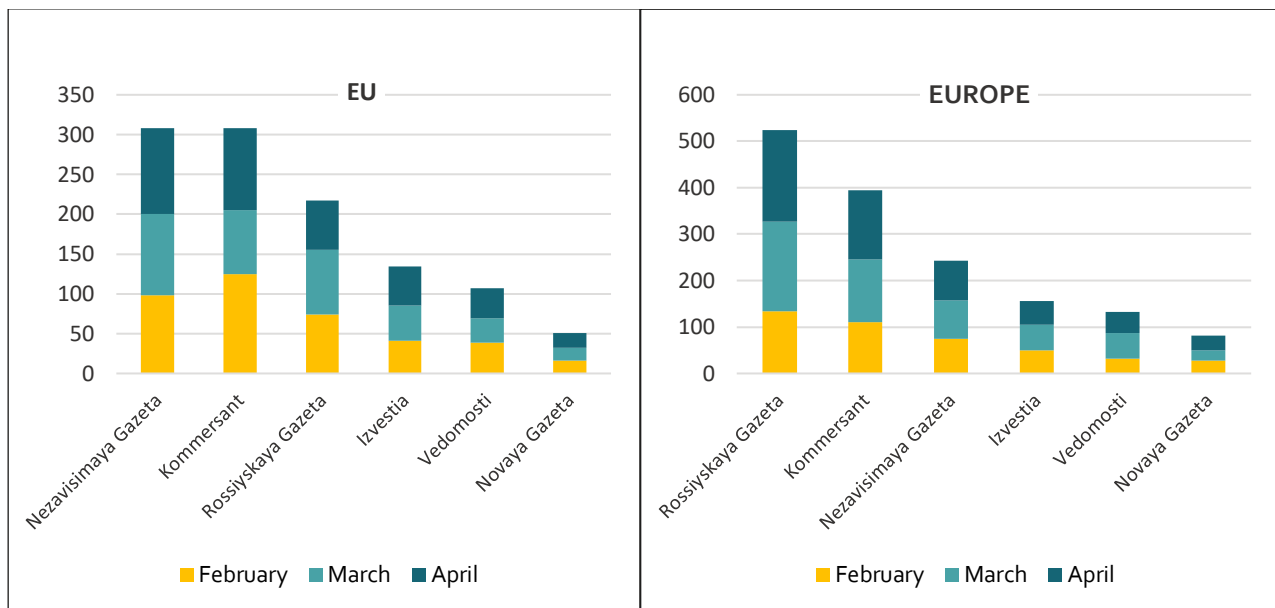
The findings of the public opinion survey contrast the opinions expressed by experts and focus groups participants. Both groups believe the awareness of the EU among the public to be shallow. As one of the experts put it, 'out of a hundred persons, hardly one will be aware of EU programmes in Russia.

The focus groups participants highlight the development of new technologies, industry, global trade, culture (mainly tourism) and green technologies as the areas where the EU, in their opinion, performs the. While students consider the COVID-19 a passing event, experts voiced reservations regarding EU performance in global health, citing 'vaccine nationalism' and medical research (mentioning the EU's inability to produce a 'European vaccine'). In general, the EU performance is evaluated poorly in the spheres where the Russian public and experts see Russia performing well (e.g. medical research, space exploration or agriculture).

Russian traditional media report on the EU substantially. The point of interest is the tensions in EU-Russia relations, including sanctions and Nord Stream-2 development, and the EU-specific events and actions representing Russia's interest. They include the COVID-19 pandemic response, the EU Green Deal policy, internal EU political developments, European culture, and history. Subsequently, the respondents in Russia believe to be well informed about the EU. Over 50% of respondents report hearing or reading about the EU daily (compared to over 60% in 2015) and a quarter about once a week. As in 2015, television remains the principal source of information on the EU for the Russian public, followed by online media.

Overall, the EU and its institutions get less coverage in Russian media than Europe's press coverage. In a combined dataset of articles covering the EU and Europe, 42.3% relate to the EU and its institutions and 57.7% to Europe. The spread of articles covering the EU is fairly even across the three months of observation in 2021: 35% of articles in the «EU» dataset were published in February, 31.4% in March and 33.7% in April. The coverage for «Europe» featured 28.5% of articles published in February, 35.4% in March and 36.6% in April.

FIGURE 91. VOLUME OF NEWS ITEMS WITH A REFERENCE TO THE EU AND EUROPE IN TRADITIONAL MEDIA. RUSSIA



Note: based on automated quantitative data analysis. Includes press articles which report on the EU and Europe as a principal or secondary subject of the article.

The EU and its institutions are typically not profiled as the main actors in the news stories. *Izvestia* presents the highest degree of centrality of the EU-related news (24.6% of articles in *Izvestiya* mentioning the EU portray the EU as the primary focus of attention). The dataset of articles that present the EU as a central point consists of 49 articles: *Rossiyskaya Gazeta* (18), *Vedomosti* (18) and *Kommersant* (13). Despite a lower volume of EU news in comparison to other outlets the EU reporting in *Kommersant*, the articles reporting the EU there are overall longer and often feature in the “opinion” section. *Vedomosti* prefers to report the EU in “world news” (22) and *Rossiyskaya Gazeta* in “events and comments” (13). News that reports on the EU as the central theme focuses predominantly on the EU’s foreign policy, human rights, health and environment, and specifically, sanctions against Russia (16 articles), followed by COVID-19 vaccines certification (12) and green energy/climate policies (Green Deal) (7). The main events that foster the view of the EU are the Navalny case, the visit of HR Borrell to Moscow and EU sanctions imposed on Russia, the problems in vaccination rollout, and the Green Deal. In coverage of EU news without the “local hook” (e.g. EU-UK relations, ECB), the media is neutral.

Like in traditional media, EU visibility in social media is slightly lower than that of Europe. The EU and Europe related posts in social media are not spread equally throughout the observation. The peak in Europe-related social media posts on 19 April 2021 is linked to the discussion around the creation of the European Super League. The peak of the EU related posts on 22 March 2021 reflected China’s sanctions towards the EU and the phone call between Charles Michel and Vladimir Putin. Another peak - on 18 April - was linked to a statement by the former President of Estonia, who called for the suspension of all travel from Russia. Moreover, many posts mentioned Alexei Navalny’s health. The posts urged the EU to act or discuss the EU statement on Navalny.

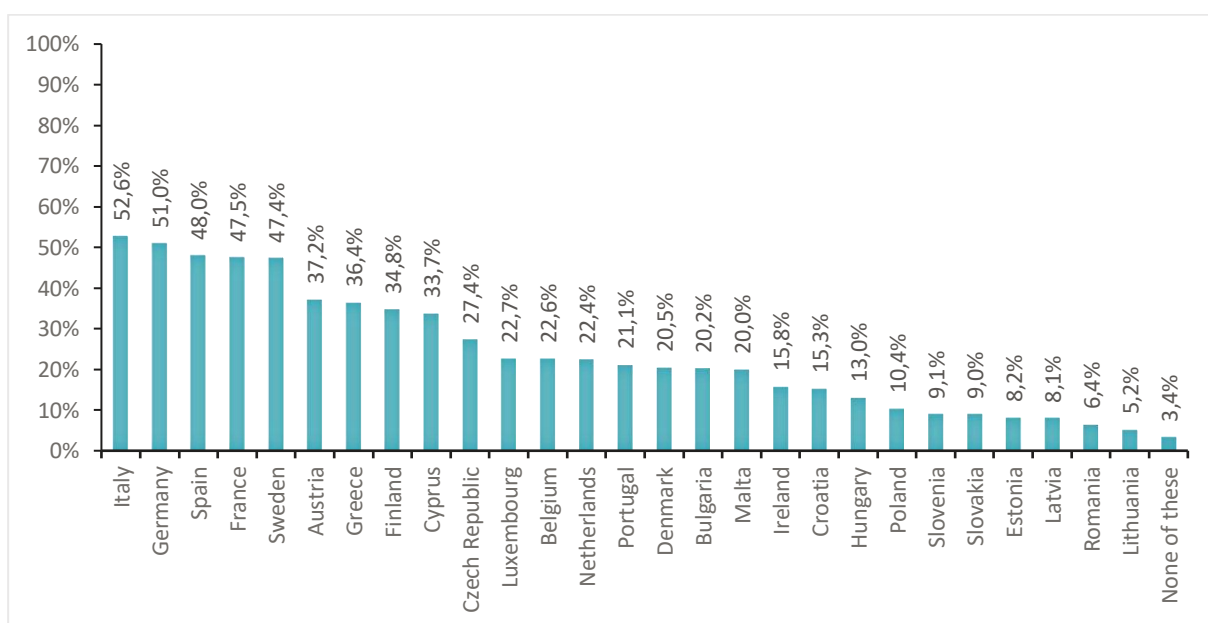
Overall, EU-Russia relations remain the local hook that triggers the peaks of the EU visibility in Russian traditional and social media.

Member States and MSs’ leaders’ visibility, EU institutions and EU leaders’ visibility

The European Commission is the most mentioned EU institution in the press articles covering the EU and Europe (157 mentions in traditional Russian media). The media pay less attention to European Parliament (90), European Council (89), European Medicines Agency (19), European Central Bank (14) and European Investment Bank (4). The press did not mention other EU institutions.

The visibility of the European Commission is mainly due to the coverage of EU relations with Russia, the EU's pandemic related actions and the EU Green Deal. The European Parliament is mentioned in the context of EU sanctions against Russia. The EMA appears in articles reporting on COVID vaccine certification and the ECB in discussions of business accountability during COVID-19. The most visible EU officials are Ursula von der Leyen, Josep Borrell, and Charles Michel mentioned in press coverage of these issues. Due to the Nord Stream-2 pipeline coverage and the US' opposition to the project, and the EU and US sanctions on Russia, the most visible European politician in the Russian press is German chancellor Angela Merkel. Germany is the most visible country. The most mentioned Member States in traditional media are Germany, France and Italy. Several countries were mentioned more often in «EU» news compared to other countries – Lithuania (73%), Hungary (70%), Greece (65%), Poland (61%). All Member State were mentioned within the corpus of Russian social media posts: Germany (957), Italy (878), France (726), Poland (484), and Spain (459) were the most mentioned Member States. Notably, Latvia and Hungary were mentioned predominantly in connection with the EU. European Commission was the most visible EU institution with 294 mentions in Russian social media. European Council (190 mentions) and the European Parliament (164) also received individual attention. European Medicines Agency (31), Council of the EU (25), and European Central Bank (20) were less visible.

FIGURE 92. ATTRACTIVENESS OF THE INDIVIDUAL EU MEMBER STATES. RUSSIA



Note: based on Q25: Please indicate which European countries look the most attractive to you? Respondents could choose more than one country (n=1114). Respondents were not limited in the number of countries they could name.

The opinion-makers and experts point to Germany as the EU Member State, maintaining pragmatic relations with Russia. They mention close business ties (notably in relation to Nord Stream 2), joint academic research in international relations, comprehensive Arctic research, environment projects, and language courses supported via German foundations. France and Spain are mentioned positively in relation to their public diplomacy initiatives. The 'New European' EU Member States (Poland, the Baltic

States) were frequently described as ‘spoilers’ of the EU-Russia relations and unsuccessful in public diplomacy, the Czech Republic - in tourism.

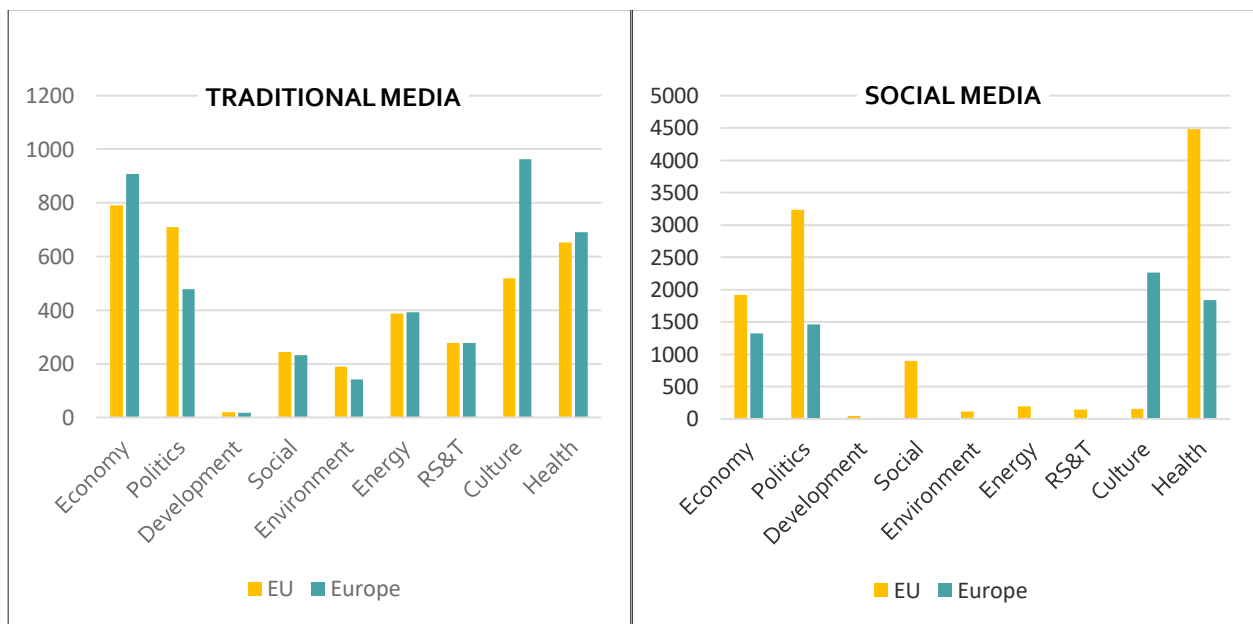
Students mentioned Germany (in connection with right-wing populism, economy, migration), Denmark (culture, education), Sweden, France (education), Bulgaria and Lithuania (standard of life), Poland and Hungary (social values).

Respondents do not mention any EU institution, referring to “the EU” in general. The exceptions were the EU Delegation in Moscow, its Head M. Ederer and the EU High Representative J. Borrell.

Sources of news about the EU

Russian media observed for the study rely mainly on local news sources. Articles usually cite Russian experts’ opinions. All three papers address the EU as acting in the local context, i.e., how EU actions affect Russia. As in the 2015 Study, such extensive local links suggest that the EU is presented by the media as a close “Other” able to impact Russia politically and economically and thus directly important. Intensive local “hooks” correlate with almost exclusive use of local news sources in all three outlets. The qualitative sample did not provide a decisive conclusion regarding the share of local and international sources of news in EU press coverage in Russia. The source was not identifiable for more than 80% of all the materials in the sample. The most mentioned foreign sources of EU related news in Russian media were Bloomberg (50 mentions), Reuters (37), Financial Times (25), CNN (18) and Politico (18).

FIGURE 93. THEMATICAL FOCUS OF SOCIAL MEDIA AND PRESS ARTICLES REPORTING ON EU AND EUROPE. RUSSIA



Note: based on automated quantitative data analysis. Includes press articles which report on the EU and Europe as a principal or a secondary subject of the article. One article can reflect more than one theme.

In the observed Russian media, the EU was most often mentioned regarding economy (21%), politics (19%), health (17%) and culture (14%) thematic frames. In the "Europe" dataset, culture (23%), economy (22%), health (17%), politics (12%) were reported the most frequently. *Rossiskaya Gazeta* newspaper

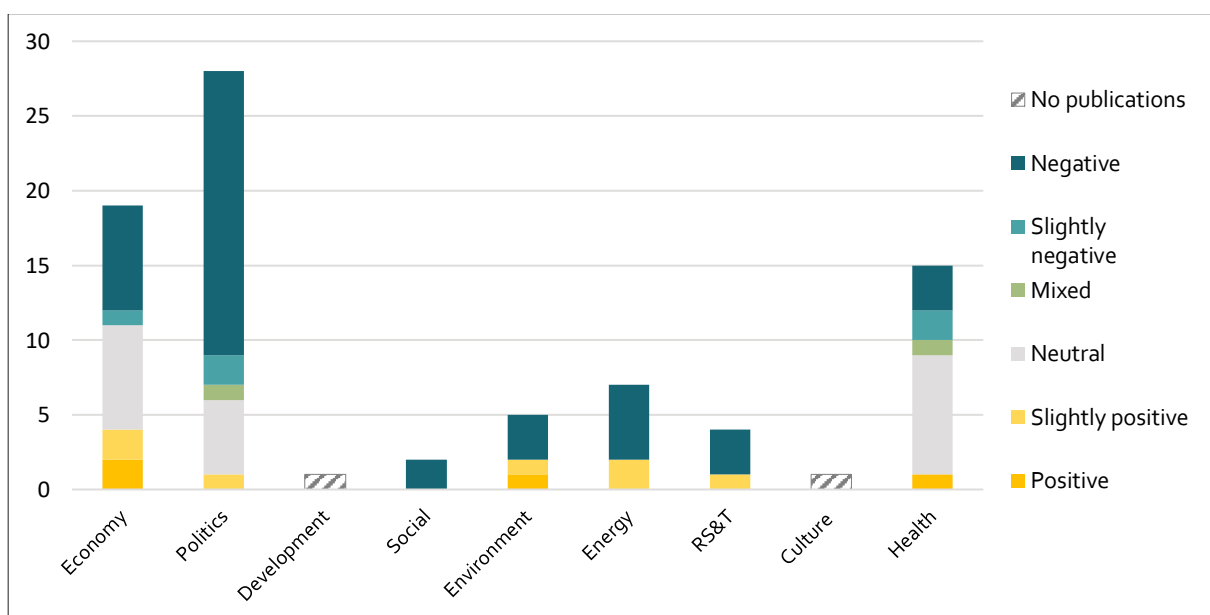
covered science, research and technology thematic frame more than the other newspapers, while Novaya Gazeta presented energy themes more frequently. For "EU" development theme had 1% of coverage and for "Europe" dataset 1% with only several articles in total. In 2015 in "Europe" dataset, social and culture themes (over 60%) and politics (20%) were more covered by the *Rossiskaya Gazeta*, the economy (nearly 60%) – by *Vedomosti* and *Kommersant* was more even these thematic frames (25-30%).

The qualitative analysis indicates that the media covered the sphere of economy predominantly. The EU is Russia's leading economic and trade partner, especially in the energy sphere and the Nord Stream-2 pipeline. In the politics theme, the press reported the EU sanctions policy due to the Navalny case and the visit of J. Borrell to Moscow. News about EU external relations highlights EU sanctions against China for human rights violations in Xinjiang. Health governance became a major theme due to the issues of the COVID-19 pandemic, associated with the vaccine crisis in the EU and the reluctance of EMA to certify the Russian vaccine. Culture is the traditional theme in Europe/EU MS–Russia relations. The science, research and technology thematic frame covered by *Rossiskaya Gazeta* was focused predominantly on the spheres of potential cooperation with the EU.

For "Europe", culture (22%), health (40.1%), politics (28.9%) and economy (17.1%). However, compared to the EU, Europe was mentioned in connection with a culture much more often (27.6%).

Emotive charge

FIGURE 94. EMOTIVE CHARGE IN PRESS ARTICLES REPORTING ON THE EU AS A PRINCIPAL SUBJECT. RUSSIA



Note: Based on qualitative media analysis conducted by country experts. One article can reflect more than one theme.

In the media articles which report on the EU as a principal actor, the EU portrayal is neutral or positive when reporting focuses on matters other than the EU-Russian political relations. EU standards on fertilisers are seen as beneficial to Russia's exports and, thus, framed positively. The EU internal problems with vaccinations are portrayed neutrally. The Green Deal appears mostly as a topic neutral from the standpoint of the EU-Russia relations but is framed as detrimental to the EU itself (the

renewable energy sources are presented as unstable). The EU's intentions are seen negatively when the EU is reported to exert pressure (e.g. 'unfair' carbon tax) on economically more vulnerable countries, such as Russia and China. Meanwhile, the future use of hydrogen in the EU is assessed positively as a possible area of EU-Russia cooperation. In contrast, in political and normative frames, the evaluation of the EU is strongly negative, as exploiting the theme of human rights in Russia or China. The titles prompt a negative image of the EU as arrogant and applying double standards (not noticing its human rights violations). Compared to the 2015 Study, EU actions are presented in a negative tone. EU institutions are framed as 'politicising' EU-Russian relations and extending this conflict to the spheres irrelevant to human rights, such as "unfair" competition against Russian and Chinese vaccines. *Rossiyskaya Gazeta* expresses a view of the need to establish a new pragmatic footing for EU-Russia relations.

In social media, emotive charge of the EU-related posts was almost evenly spread between neutral (38.1%), positive (32.4%) and negative (29.5%). Europe was mentioned in a positive light most often (42.6%).

Continuity and change behind visibility and emotive charge

A public opinion poll indicates that in 2021, the EU has become more visible in Russia than in 2015, though the public opinion of the EU is much less positive. The only two positive descriptors out of seven offered by opinion poll questions associated with the EU by more than one-third of respondents were "modern" and "multicultural".

Experts in 2021 reveal mixed opinions of the EU. Its performance in education and science and culture is assessed positively, whereas its political role in their view has.

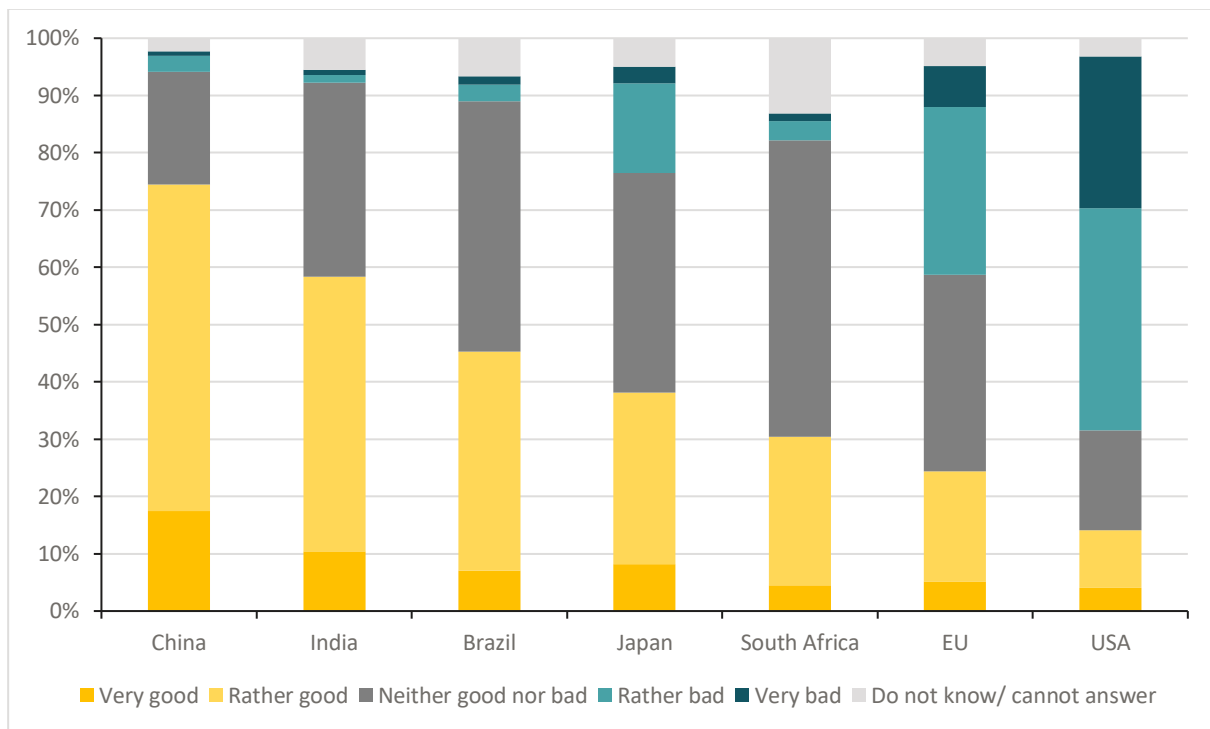
The change in EU perceptions by *youth* (in comparison to 2015) is linked to *local* factors: Russian students no longer perceive Russia and Europe as very different in terms of culture. Instead, differences in values between Russia and the EU are seen as similar to differences in values among the EU Member States. In contrast to the 2015 Study, the 'New European' EU Member States (Poland, the Baltic States) were clearly defined by experts and students as a distinct group compared to the rest of the EU. In 2015 press analysis, negative evaluations of the EU were expressed in connection to the Ukraine crisis, the Greek debt crisis, EU policies on migration. The press coverage of the EU now appears more negatively charged than in 2015 for imposing the human rights dimension on non-political spheres. Yet all sources acknowledge the EU as an international leader in the environmental/ecological field and are positive to cooperation.

1.11.3. Actorness and local resonance

The EU as a partner

The public opinion of the EU as a partner to Russia is negative: only 5.2% of survey respondents think the relationship with the EU is "very good" and 19.2% - that it's "rather good". It places the EU behind China (74.5%), India (58.4%) and Brazil (45.3%) in the ranking of Russia's partners. Only relations with the US (14.1% of respondents see them positively) are perceived worth. Nevertheless, the situation in 2021 is an improvement compared to 2015, when just 11.1% of respondents described the relationship with the EU as "very good" (1.8%) or "rather good" (9.3%). Seventy-five per cent of Russian respondents think that the EU 'should have stronger political ties with Russia (34.3% "strongly agree", 40.9% "agree", 3.4% "disagree", 1.4% "strongly disagree"). Less than half of respondents - 41% - think the EU is a trustworthy partner (14.7% strongly agree and 26.1% agree).

FIGURE 95. EVALUATION OF RUSSIA RELATIONSHIP WITH THE EU AND OTHER COUNTRIES

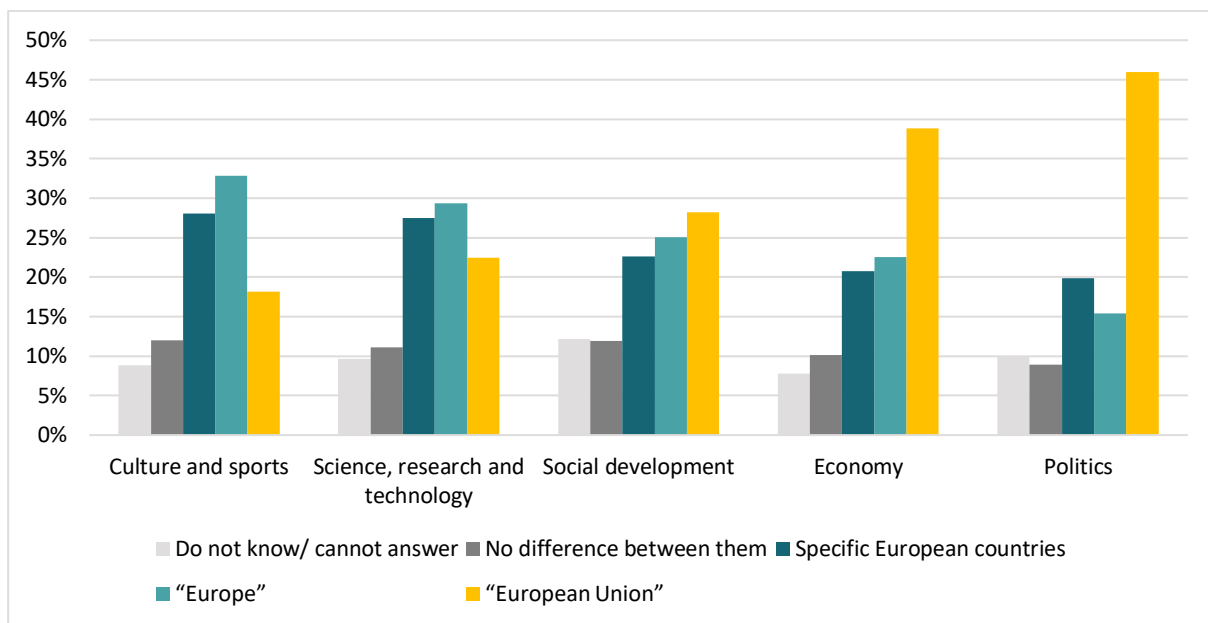


Note: based on Q3: Which of the following words best describes your country’s overall relationship with each of the following countries and organisations? (n=1114)

The experts and influencers see the EU as an important actor in international relations. Still, as to stronger political ties with Russia, opinions differ those on the “liberal” side would welcome such developments, while those who believe that Russia should be assertive as a nation-state (“the statesmen”) presume that the EU should leave aside its ‘preaching’, return to pragmatic interests and put its own house in order (i.e. violation of human rights in the EU MS). The EU is seen as an adversary under the influence of the US - ‘the US had been giving orders, is giving orders and will give orders’ [to the EU]. As for the youth, most of the students express positive perceptions of the EU’s leadership in environment and climate change, highly assess educational exchanges and the culture of Europe, but express concerns over the assimilation of migrants.

Economy and trade

FIGURE 96. ASSOCIATION OF DIFFERENT AREAS TO THE EU VERSUS EUROPE. RUSSIA

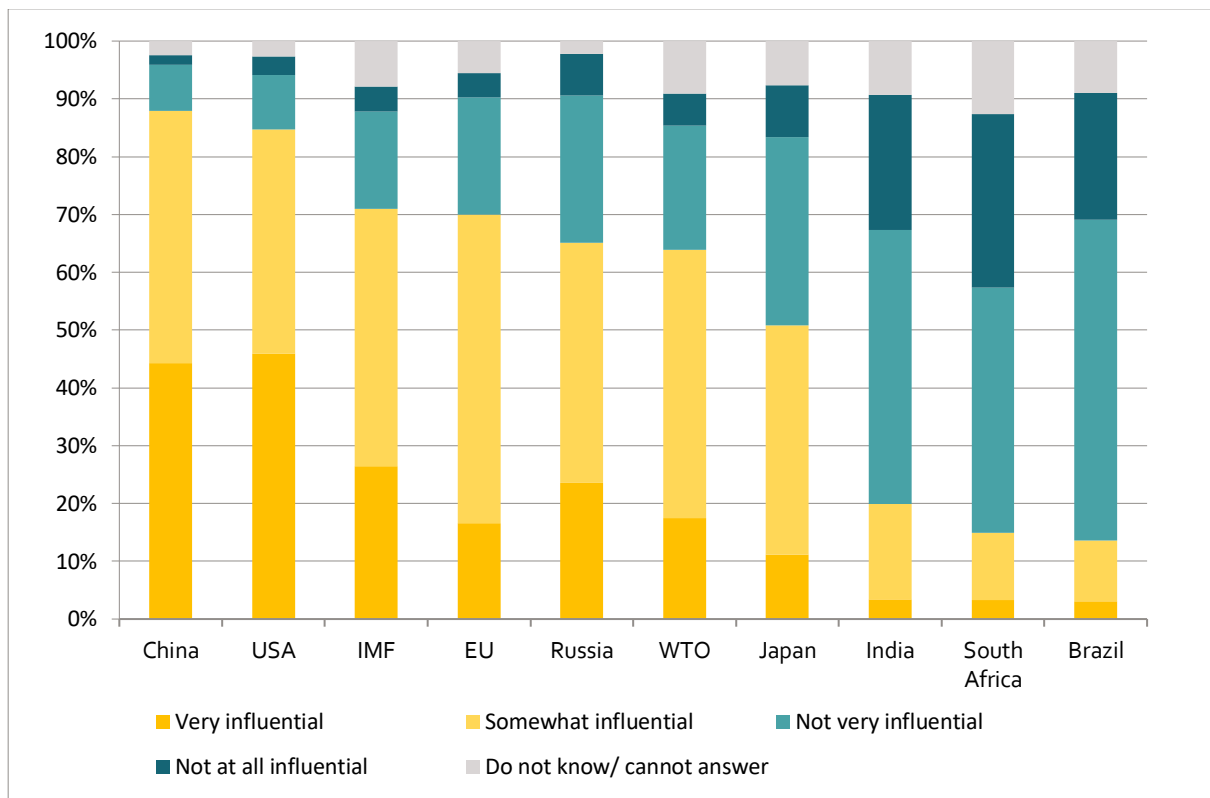


Note: based on the answers to Q22: Some people think about Europe, whereas others think about the European Union when talking about economy, politics, culture, sports and other areas. In your case, which term – Europe or the European Union - comes to your mind first when you think about the following subjects? (n=1114)

**Please note that in 2015, this question was accompanied by a chart in a different format under the section “Research, science and technology”. The wording and answer categories used in this question have changed in 2021, making it inappropriate to conduct historical comparisons.*

The EU is perceived as very influential in global economic affairs only by 16.6% of the survey respondents (6th place), well behind the US (45.9%), China (44.3%), IMF (26.5%). In 2015 the EU ranked 5th with a higher share than in 2021 (23.5%) - after the US (51.9%), Russia (39.3%), China (37.4%). Regarding economic relations with the EU, 76.6% of the respondents strongly agree and agree that the EU should have stronger ties with Russia (4.5% disagree and strongly disagree, with the “Do not know”/cannot answer - 4.7%). In 2021 68.3% of respondents see the EU as an important trade partner (strongly agree 25% and 43.3% agree). This is an increase from 2015 when 55.2% of the Russian public supported trade with the EU. In 2021 54.8% consider the EU an important foreign investor (strongly agree 22.0%, agree 32.8%). The opinion that the EU is protecting its market at the expense of others is shared by 59.1% of respondents echoing the 2015 Baseline Study.

FIGURE 97. EU INFLUENCE IN GLOBAL ECONOMIC AFFAIRS COMPARED WITH COUNTRIES AND INTERNATIONAL ORGANISATIONS. RUSSIASA



Note: based on the answers to the survey Q6: In your view, how influential, if at all, in global economic affairs are the following countries and organisations? (n=1114)

Russian media are presenting trade and economic relations with the EU positively. Yet, economy and trade relations are also seen as dependent on the state of EU-Russia political relations at large. The three dailies of the qualitative analysis are neutral or positive when reporting on matters other than EU-Russian political relations. For example, EU standards on fertilisers are seen as beneficial to Russia’s exports and, thus, framed positively.

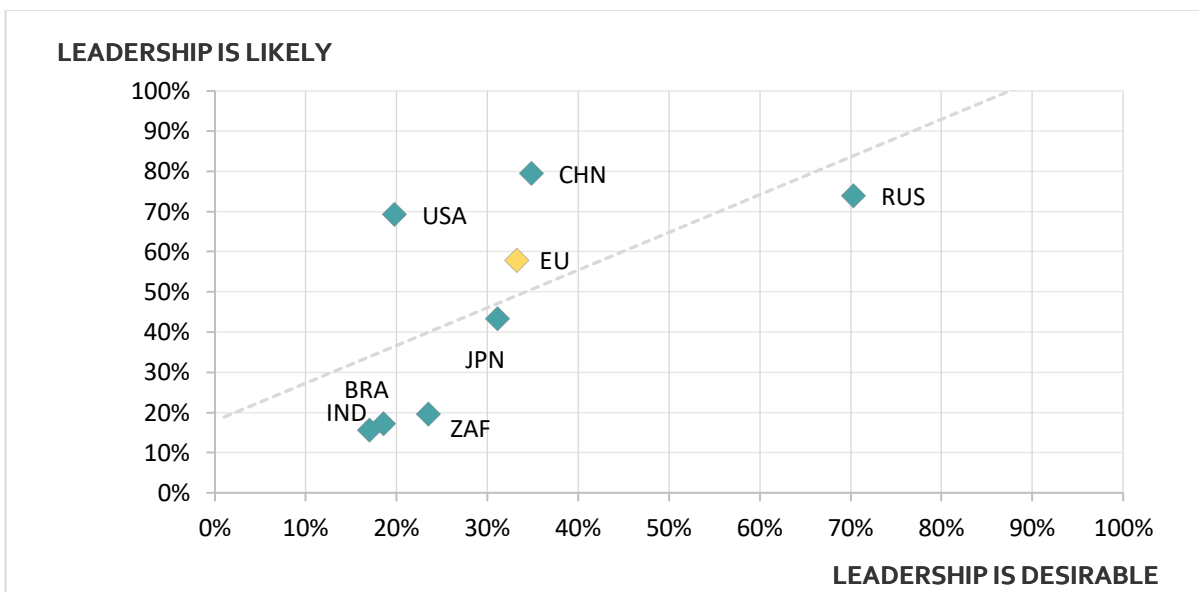
Experts unanimously consider cooperation in the economy to be extremely important and beneficial to both sides. They express regrets that the economic and business ties have been diminished or severed by the EU sanctions policy that ‘shoots itself in the foot’ because Russian and the EU economies ‘are complementary’. Experts also stress that Russia’s turn to Asia - ‘not away from the EU’ suggests the loss of competitiveness by the EU. The EU sanctions policy is perceived as a means of the EU to protect its market, note the business elite, echoing the survey.

Russian students see the EU as a powerful economic actor acting under the political influence of the US towards Russia. The EU, thus, is seen as Russia’s adversary, yet not an antagonist (such as the US – in political and military terms). In comparison to the 2015 Study, in which Russian youth saw the EU as a union founded to guarantee peace, in the 2021 sample, they see the EU as primarily an economic integration organisation.

Politics

The EU lags Russia, China and the US in its global leadership potential perception in Russia. For the Russian public, of all the potential global leaders, the desirability (“very desirable” and “desirable”) of Russia’s global leadership is the highest (68.3%). In contrast, the desirability of the EU leadership (33.2%) is almost on par with China (34.8%), Japan (31.1%), although it is higher than the US (19.73%). The perceived likelihood of global leadership (“very likely and “likely”) is higher for China (74.8%), Russia (73.9%), the US (69.3%). The EU is lagging with 57.9% of respondents stating its global leadership is either “very likely or “likely”. In 2015, the desirability and likelihood of EU global leadership in the eyes of the Russian public were lower (31.1% and 52.9%, respectively). The Russian general saw China (83.7%), Russia (81.9%), the US (67.1%) as more likely to be global leaders.

FIGURE 98. DESIRABILITY VS. LIKELIHOOD OF EU GLOBAL LEADERSHIP COMPARED TO OTHER ACTORS. RUSSIA



Note: based on Q4: How desirable is that each of the following countries and organisations take a strong leadership role in world affairs? And Q5: how likely or unlikely is it that each of the following countries and organisations will take a strong leadership role in world affairs five years from now? (n=1114) The horizontal axis presents the sum of “Very desirable” and “Somewhat desirable” responses to the Q4. The vertical axis presents the sum of “Very likely” and “Rather likely” responses to Q5.

The public attributes the important role in maintaining global peace and stability to Russia 82.1% (“very important” 43.7% and “somewhat important” 38.4%), China 76.8% (23.6% and 53.2%), the UN 64.8% (20.9% and 43.9%) and only then to the EU 63.7% (19.4% and 44.3%) in 4th place, the US 57.6% (23.1% and 34.1%) and NATO with 54.3% (18.1% and 36.2%). As such, the perceived role of Russia in maintaining global peace and stability is higher than that of the EU. It is also known better: the “Do not know/cannot answer” for Russia is 4.0%, compared to UN and NATO (9.6%), the EU (7.0%) As in 2015, the EU lagged Russia, China and the UN. In Russia, the EU’s performance was seen as similar to that of NATO and the US.

In 2021 perception of the EU role in political affairs is seen as highest in justice and the rule of law (46.9%), media freedom (46.5%), fight against terrorism and radicalism (46.0%). The EU’s role is perceived most negatively in dealing with refugees, displaced people (25.1%), military operation (24.9%), peacekeeping operations (24.3%), foreign policy (21.5%). In the “Do not know” category, the share of the respondents that are unaware of the EU role is relatively low: in military operations is (13.6%), peacekeeping operations (11.7%), support for regional and international cooperation and

support for developing countries (11.0%), the fight against climate change and protection of the environment (10.6%). In 2015 the EU's performance in the fight against terrorism was regarded slightly less negatively than in other fields related to peace and stability, namely military operations or peacekeeping operations.

In contrast to the economy, in the political frame, the evaluation of the EU is dramatically negative. In the media, as in the 2015 Study, the 2021 framing is led by portraying the EU actions as the cause of the negative charge. EU institutions and its officials (e.g. Ursula von der Leyen and Josep Borrell) are portrayed as politicising EU-Russian relations and extending the conflict to the spheres irrelevant to human rights such as unfair competition (e.g. in vaccines, the Carbon Border Adjustment Mechanism (CBAM)). *Rossiyskaya Gazeta* predicts a new pragmatic footing for EU-Russia relations to be set on. Focusing on the EU's external actions, media in Russia frame the EU's position on human rights in an antagonistic manner by arguing that the EU is violating the principle of sovereignty. Russian press points to double standards towards the human rights situation in the EU itself, linking it to social (in)equality. The opinions of the Russian experts and influencers are ambivalent – from positive assessment of the EU's foreign policy (focusing, e.g. on human rights promotion or gender equality) to sharply negative – in this view, human rights violations are common in the EU and EU actions are perceived as hypocritical interference in internal affairs of Russia. The EU promotion of media freedom also gets polar reflections. The decision-makers see the consequences of the migration crisis to put the future of the European identity of the EU in peril. Another perception among experts is 'hypertrophy of minority rights' and a paradoxical downgrading of Christian communities and traditional values. One of the dominant perceptions is that EU sanctions imposed on Russia for political reasons backfire on the economy of the EU and its public diplomacy. In 2015 the experts did not mention this aspect – of the EU 'shooting itself in the foot'. The EU is seen by students as a society that promotes human rights, gender justice and democracy. They find the EU to be more tolerant than Russia. One student was very worried about the migration problem in the EU that, in the view of this student, gives rise to terrorism on the one hand, and right populism, on the other.

Climate and Environment

The public in Russia believes that Russia's role in fighting climate change and protecting the environment is higher than the role of the EU (71.1% and 70.6% of respondents respectively believe the roles of Russian and the EU to be "very important" or "somewhat important"). China is ranked third 66.1%. The EU role in fighting climate change is well known and believed to be important.

The climate theme gets special attention in the media reports and is often reported on in connection with the economy, environment protection, energy, and science, research, and technology. Russian media frame the EU Green Deal positively, voicing expectations of the EU-Russia potential cooperation, specifically hydrogen energy. However, some EU initiatives receive mixed evaluations. In particular, the Carbon Border Adjustment Mechanism is seen as an EU unilateral policy, benefiting the EU solely. Russian media believe that the EU is overestimating the reliability of renewable energy resources (RES) and equipment in unfavourable weather conditions. They point to the issue of pollution caused by the production and utilization of RES equipment. The future usage of hydrogen, however, is assessed positively as a possible area of EU-Russia cooperation.

The EU internal climate change prevention activities are extensively covered by the media. The EU performance in this sphere is the second most positively evaluated by the opinion poll respondents (after the overall quality of life). The experts in Russia believe the climate and environment agenda to be important and acknowledge the EU active role in setting it. The experts, however, are ambivalent about its effectiveness, seeing the climate in conjunction with the economy and energy. Young people are enthusiastic as to the climate and environment agenda praising the EU role.

Energy

Russian media report extensively on the EU action and policies in the energy sphere. The reporting on energy is often linked to the economy and climate/environment theme. Russian media discuss unrealistic EU ambitions in renewable energy but voice expectations of future Russia-EU collaboration in the hydrogen energy area. The central point of attention in 2021 media reporting is the future of the Nord Stream-2 pipeline. The EU Commission, the European Parliament and Angela Merkel are mentioned as actors influencing the issue. Experts assess the EU rejection of fossil fuel and nuclear energy as “nonsense”. Experts speak of “politicisation” of discussions over the Nord Stream-2 project, which in their view Poland and the Baltic States have raised to the level of a “geopolitical threat”. Commentators in Russia present the EU Nord Stream-2 debate as an example of how the “New Europeans” manage to “Europeanize” their interests and the “Old Europe” is unable to “tame” them, thus harming the EU. Experts are confident that the 30% limits on Russia’s share in the EU gas market will prove irrational (the EU has no other cheap gas supplier). The EU is seen as not flexible: instead of searching common ground between supplier and customer to guarantee the diversity of supply routes, it is ‘putting a straitjacket’ on the supplier to EU’s harm. Students have positive perceptions of the EU’s leadership in green energy. They mention gas projects with Germany, Austria, the UK and France, or joint green energy projects. Students, however, also see China as a partner of Russia in the field of energy.

Research, Science and Technology

For the Russian public, the EU (70.5%) is lagging China (85.7%), Japan (79.4%) and the US (76.9%) and is on par with Russia (69.9%) in advancing innovations and technological progress. In the qualitative media analysis, the SRT theme did not get coverage except in connection to the new technologies developed to fight climate change (hydrogen energy). Potential cooperation between Russia and the EU, specifically in hydrogen sources of energy, is commented on positively. Experts highly appreciate joint research projects with the EU and EU Member States, saying that the sanctions policy did not stop collaborative research. They also expressed concerns over the limited funding on offer, which in effect becomes a discriminating factor for Russian applicants (‘numerous Russian applications should be super good to receive grants’). Business elite notes that Russia is buying mining and oil drilling equipment from Asian countries. This is the result of the EU is losing competitiveness on the market, and the EU sanctions policy. Students mention the EU’s role in the RS&T area but do not provide any further commentaries.

Development

As in 2015, the EU’s international development frame received minuscule media visibility in the monitored outlets. Support of developing countries by the EU is commented on with scepticism by experts and the youth. Public opinion, reflecting on the support to developing countries, viewed the EU (57.1%) as less important than Russia (65.3%) or the UN (58.2%) (similar to 2015), but more important than other actors. Still, a significant part of the survey respondents does not attribute importance in this field to the EU, UN and Russia (30.2%, 27.7% and 27.1%, respectively). The role of the EU in this respect does not have visible coverage in the media in contrast to Russia’s performance. The press in Russia reported that by March 2021, the Russian COVID vaccine was available in 42 countries while EMA was delaying its registration for use in the EU.

Social

The volume of media materials reporting on the EU in connection with social issues is low. This is different from 2015, when the media reported extensively on the migration crisis presenting the EU in negative terms.

The migration theme, however, is still essential in defining the perception of the EU. In view of the experts also point that integration of migrants and refugees while maintaining its European identity is a challenge for the EU. This opinion is also shared by the students. The areas of the EU social development seen by the Russian public the least positively are the integration of migrants and refugees (only 14.7% of respondents see it as “very good” or “fairly good”), eradication of poverty (12.0%) and, reducing income inequality (11.9%). The areas where the EU is seen as most effective are the overall quality of life (68.9% of respondents see it as “very good” or “fairly good”), the level of education 63.5%. Creating employment opportunities, climate change activism, equality between men and women, protection of minorities, social justice and solidarity are seen positively by over 50% of respondents.

Experts highly evaluate the EU mechanisms of educational and academic mobility, research cooperation programmes such as Erasmus, Jean Monnet, Marie Curie, Horizon. Experts in the academic circles note that the EU has succeeded as a norm-setter in this issue-area introducing the Bologna system in Russia. Still, they doubt whether this system has benefitted Russia. Students describe the EU as an international leader in education and student exchanges, pointing to the potential for EU public diplomacy in this area.

Students also express a high opinion of the quality of life high in the EU, reflecting very positively on climate change activism. They also appreciate inclusiveness for minorities such as LGBT and gender equality. Social problems are mentioned in connection to the EU cohesion policy deficits that cause frustration in the ‘new’ EU MSs and burden the richer EU MSs.

Culture

In the eyes of the Russian public Japan, the EU and Russia are the actors with the most attractive culture and lifestyles (76.3%, 76.0% and 73.5%, respectively). The situation in 2021 differed somewhat from 2015 when the attractiveness of the EU culture and lifestyle lagged Russia and Japan. Overall, Russian respondents generally see Europe as an attractive tourist destination. Various fields of culture and sports activities in the EU continue to receive high appreciation from the Russian public. In 2021, negative opinions of the EU lifestyle do not exceed 15%. The most positive opinion of the EU performance in culture and lifestyle relates to tourism (76.4%). Music, luxury goods and clothes, arts, monuments and museums, theatre and cinema also receive positive opinions (72.5-74.0% of respondents see them as “very good” or “fairly good”), followed by food and cuisine (68.7%). Multiculturalism (68.0%) and sport (68.0%) are ranked lower. History with 62.5% of positive respondents’ opinions remains the least appreciated in 2021 (as in 2015) component of the EU culture.

The elite has a favourable opinion of the EU Member States supporting cultural projects and initiatives in Russia through the *Goethe Institute*, *Alliance Française*, *Instituto Cervantes* and *Heinrich Böll Stiftung*. Culture seems to be one of the few non-politicised spheres of EU-Russia cooperation left, and thus elite attribute to it the role of a link with the EU. They believe that any cultural entity would cooperate with the EU and EU Member States at any level (national, regional, local). Most young respondents consider the EU to be an international leader in culture. Russian students point to the potential of culture for the EU PD, especially film festivals, book fairs and connect culture to the EU Member States rather than the EU.

Health

The EU’s internal health governance is a central topic of reporting in this issue area. The media focuses on the problems with COVID vaccination, vaccines shortage and internal discord surrounding vaccine supply in the EU. Specifically, the media covers the EU-UK “vaccine war” and the EMA’s decision to prolong the certification procedure for the Chinese and Russian vaccines. The latter is framed as a political decision linked to human rights violations accusations brought by the EU. The media argue

that this move disadvantages EU citizens. Bureaucratic and human rights issues are reported in relation to a COVID vaccine passport or travel pass in the context of travel to the EU (tourism, visa applications). COVID-19 pandemic, in general, is covered in connection to its economic impact and the role of science, research and technology in introducing innovations in the health sector. Experts assess the health governance in the EU positively overall. They stress, however, that the pandemic uncovered the absence of an EU unified policy as the EU Member States tried to cope with the pandemic on their own and did not want to share the vaccine supplies. Youth assesses health governance in the EU as efficient and do not comment on the COVID-19 pandemic regarding it as a passing event.

Continuity and change behind actorness

The Russian public considers that the EU is an important partner to Russia in international relations and desires to have stronger political ties with the EU. Nevertheless, that other countries considered in the survey have better relations with Russia, except the US (the same as in 2015). Less than a half of respondents think the EU is a trustworthy partner, and a quarter of respondents believe it to be the opposite.

In 2021 and 2015, the public, experts and youth agree that the EU is an important trade partner for Russia. Experts regret that economic and business ties are being limited by the EU sanctions policy, harming both sides. Economy and trade relations are also presented as dependent on the state of EU-Russia political relations at large. Compared to 2015, when Russian youth commented on the EU as a union founded to guarantee peace, in 2021, they see the EU as an economic integration organisation.

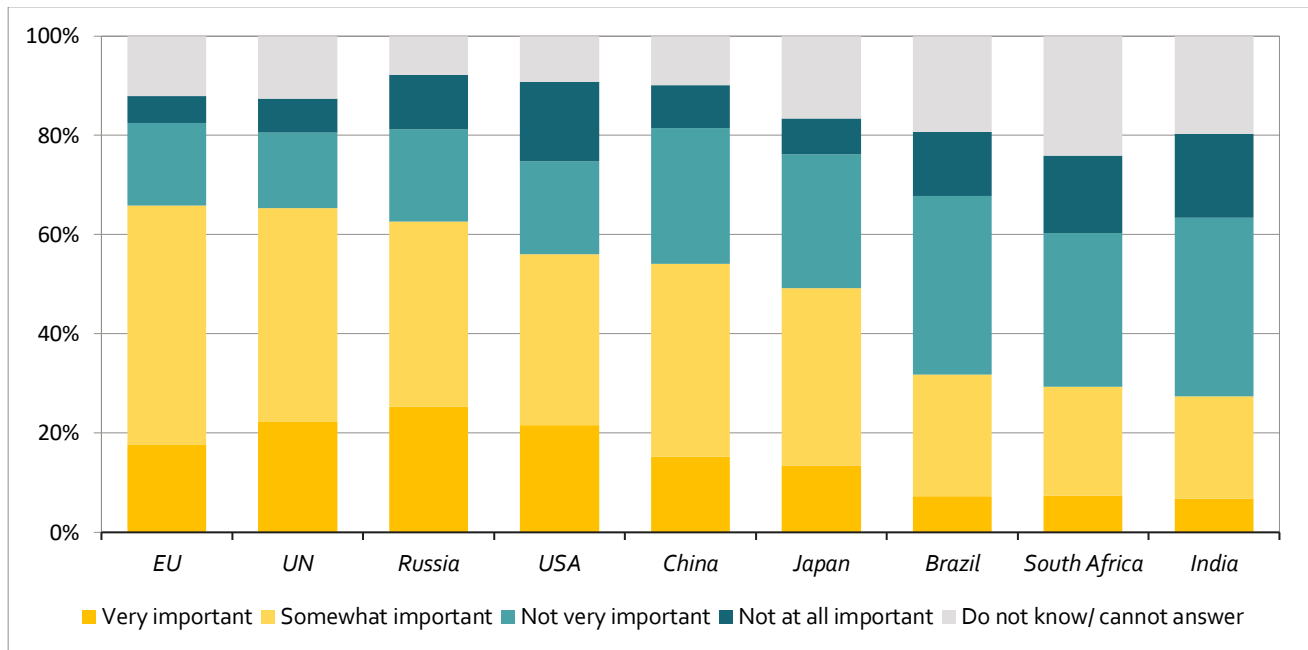
The EU is also seen as an adversary under the influence of the US. The literature argues that this dependency weakens the EU's international weight and significance. The experts and influencers differ as to the need for stronger political ties with the EU. The "liberals" would welcome them, while 'conservatives' presume that the EU should return to pragmatic interests and pay attention to the violation of human rights by police in the EU Member States. The EU's performance across social development indicators such as quality of life and level of education, culture, and the EU's role in fighting global climate change and protecting the environment all continue to have positive perceptions among the public, youth and experts. Cooperation in science, research and technologies is highly appreciated by experts and students.

1.11.4. The EU as a norm-setter

The public attributes importance to the EU in global human rights (65.9% of respondents see its role as a "very important" or "somewhat important") on par with the UN (65.4%) and Russia (62.6%), while the US is at 55.9%. This contrasts the 2015 finding when the EU with 50.5% and the US (42.5%) lagged Russia (62.8%) and the UN (60.4). The finding does not exactly correlate with the perception of the EU role in maintaining global peace and stability. Similarly to 2015, the EU with 63.7% lags Russia (82.1%), China (76.8%) and the UN (64.8%).

The EU's image in democratic values is positive. The survey indicates a split in perceptions of similarity of individual values between Russia and the EU – 40% vs 30%. As for the statement that the EU is a good example for Russia in promoting gender equality, the split is more manifest (38.6% strongly agree and agree, 37.8% disagree and strongly disagree, while 7.7% do not know). For both questions, the category "Neither agree nor disagree" is rather large (25.6% and 22.9%, respectively). A high level of similarity is in the values of respect for human dignity (71%), liberty (67.8%), respect for human rights (66.2%) with 'not very or not at all similar' ranging from a fifth to a quarter for these items. About 9% of respondents do not know/cannot answer the question. The share of respondents who considers differences in individual values to be significant is relatively high (a rise from 21.6% to 46.0%).

FIGURE 99. PERCEPTION OF THE IMPORTANCE OF EU, OTHER ORGANISATIONS AND COUNTRIES IN GLOBAL HUMAN RIGHTS. RUSSIA



Note: based on Q11: In your view, how important, if at all, a role do each of the following countries or organisations play in promoting and defending human rights worldwide to protect human dignity, freedom, equality and solidarity? (n=1114)

In Russian media, the EU’s normative image is framed strongly in a political context. News coverage revolves around the coordinated Western sanctions on Russia in reaction to the case of Aleksey Navalny (and on China in respect to Xinjiang Uighur people). While media links these actions by the EU to human rights, they still frame EU sanctions as a political and not normative decision. Further, EU actions are seen as interference in the internal affairs of Russia (and China). As a result, up to three quarters (21 out of 28 publications) of EU news in the political theme are framed negatively in the sample where the EU is of major focus. For Russian media, and as in the 2015 Study, the EU’s normative profile reflects the EU’s hypocrisy and double standards. Negative assessments are less pronounced regarding environmental and climate norms, which receive a more neutral coverage. Similar to 2015 the EU’s normative profile attracts limited media attention. In Russia, the exhibit is a continued low profile of the normative theme or a decrease.

Experts express polar opinions on the EU as a norm-setter. Many experts point out human rights violations not only in Russia but in the EU as well. Still, Russia is ‘not declaring that the EU has no values’ or is ‘not reminding Europe of its concentration camps’. Among the perceived by students challenges of the EU in Russia are differences in societal (post-modern vs traditional) and religious (Catholicism/Protestantism vs Orthodoxy) values.

Continuity and change behind the perception of EU as a norm-setter

From the elites’ point of view, EU attempts in norm-setting exacerbate bilateral confrontation. Literature suggests that Russia’s reversal towards traditional values’ discourse is seen as the main internal (location-specific) factor shaping negative attitudes towards the EU in the field of democracy promotion. In 2021, in view of Russian elites, the factor impacting the EU relations with Russia at present is the arrogance on the part of the EU and reciprocal indignation on the part of Russia. One

expert explained that normative power does not have goal-setting – it implies leading by own example, while the ‘arrogant’ EU is actively trying to influence/impose rules on its partners. Thus, the EU is not only defending its values per se but defending its status as the only agent of values, the only interpreter of these values and the right to define what is ‘normal’. Experts and students likewise emphasized the difference in values among the EU Member States, distinguishing liberal (e.g. France) and traditional conservative (Poland and Hungary) states, drawing parallels between Russia and the EU. As to the global factor, the elites in Russia see Europe as steadily losing its economic potential compared to Asian emerging powers and subsequently engaging in the values ‘infertile polemic’ harmful for both sides (EU and Russia). In response, Russia is ‘retaliating’ in the values dispute, pointing to the violations of human rights in the EU.

Compared to 2015, the public opinion in Russia regarding the EU role in human rights protection has improved. In 2021, the EU has slightly overperformed Russia as a perceived human rights protection actor being on par with the UN. In 2015 the EU followed Russia in public opinion. However, in 2021 the public is split almost evenly on the issue of the EU sharing the same democratic principles as Russia and the EU as a good example for Russia in promoting equality between women and men.

All these have affected the EU’s credibility and the image of the EU as a model. However, historical, and cultural ties with Member States (particularly France, Italy, Germany and Spain) are still considered very strong and the EU continues to be positively viewed by the general public, youth and experts in the areas of internal social development indicators, culture and fighting global climate change and protecting the environment.

1.11.5. Continuity and change

As in 2015, EU perceptions in Russia remain a result of interactions between internal (Russia-specific) and external (EU specific and global) factors. Thus, the public attitudes are volatile and multifaceted, reflecting the events developments. A steady improvement of perceptions on the EU since 2015 up to the second half of 2019 gave way to a fall by May 2021 (from 52% to 38% positive)..³⁸ The public perception of the EU in Russia is largely determined by the difference in the information sources that people use. The change in TV coverage of the EU came immediately after the sanctions that the EU countries imposed on Russia in the wake of the Ukraine crisis. In view of the public, Russia is more important an actor on the global scene compared to the EU preservation of peace and stability, support for international development and fighting climate change, though the role of the EU is highly appreciated in this sphere, culture, and education (especially by experts and youth). In RS&T the EU is seen as lagging China, Japan, the US and equal to Russia. Students appreciate culture and lifestyle in ‘Old Europe’, have a somewhat romantic perception of the EU overall, though pointing out problems, namely the lower quality of life in “New Europe”.

There is a strong correlation with personal experience in Europe, level of education and the source of information. People with personal experience in Europe perceive the EU much better than those who do not travel to Europe and get information from TV. This does not apply to more educated respondents with personal experience of the EU (Zverev and Rogozar, 2016; Shestopal et al., 2016). The elite perceptions, especially those with direct experience dealing with the EU, are mired in its “over-bureaucratisation” and inflexibility as in 2015.

Russian elites blame the current state of the EU-Russia relations on the EU and seen as a result of the EU’s past strategic miscalculations in its policies throughout the 1990s, Eastern enlargement, the

³⁸ <https://www.levada.ru/indikatory/otnoshenie-k-stranam/>

Ukraine crisis, the cases of the Skripals and Navalny. The political theme dominates the discussion in realpolitik terms, wherein Russian elites and public see security issues (and growing visibility of the US/NATO in this area and “lack of EU strategic autonomy”) as well as the EU’s growing presence in the post-Soviet space as a threat to Russia’s national interests. Further fears in Russia are related to a possibility of deepening East-West division in the EU itself (a development since 2015): the “new” EU Member States - Poland and the Baltic States - are seen as irresponsibly fuelling rifts using the EU and its institutions as tools in their bilateral conflicts with Russia.

In literature, Russia’s reverse towards traditional values discourse and sovereign democracy (though the latter term is not used now) under President Putin is seen as the main domestic factor shaping negative attitudes towards the EU (Headley, 2018; Foxall, 2017; Verpoest, 2018). On the other side, the promotion of the values is seen by interviewed influencers in Russia as “politicising” issues and arrogance on the part of the EU, positioning itself as the only norm-setter. Russian experts argue that the EU should be the first to initiate a dialogue with Russia (Zverev and Rogozar, 2016) and that revision of the EU’s foreign policy may bear the fruit in the future (Headley, 2018). The interviewees predict that 5 years are not enough to reverse the negative trend. Others are more pessimistic (“there is no light at the end of the tunnel”).

The attitude to Europe is benevolent in general, unlike the attitude to the EU. At the same time, as in 2015 Russians see their country as an integral part of Europe and, through this, support neighbourhood and partnership relations with the EU.

1.11.6. Recommendations for EU public diplomacy

Perception studies post 2015 shows Russia’s attitude towards the EU as unfavourable and shaped by the state of EU-Russia relations at large with few to no opportunities for improvement in the medium-term. EU-Russia cooperation will be limited in politics, energy or economy (due to the EU ‘selective engagement’ policy towards Russia); cooperation in international conflict resolution will depend on mutual interests of the two parties (e.g. the Iran dossier, the Middle East); the EU intends to remain engaged with Russia on issues like the pandemic and climate change. Contacts with human rights groups in Russia will be difficult (due to the stance of the Russian government).

As to demographic characteristics, students and the less educated view the EU more positively. The region of residence (interviews) did not account for differences in perceptions. Personal experience of the EU among the more educated shows ambivalent perceptions of the EU and EU-Russia relations, though genuine desire to ameliorate bilateral relations. Structural explanatory criteria account for differences in perceptions (culture, history, political and geopolitical context, and economic interdependence). Recommendations are focused on paths to maintain relations.

Based on the survey, media analysis, interviews and focus groups literature review, the Public Diplomacy initiatives should prioritise the themes seen in Russia as “not-politicised”. (i.e., not loaded with unreasonable conditionality and ideological charge, putting ideological interests before pragmatic economic reasons, and extending the conflict in bilateral relations to the spheres irrelevant to human rights). A real challenge for EU Public Diplomacy is to overcome a dominant vision of the EU as listening to itself and to its ‘clients’ (EU oriented) and not to alternative views, reflecting the perceptions of the EU as ‘arrogant’ in public opinion. The EUD brings together ‘like-minded people’. Probably the outreach should include various target groups.

The neutral-to-positive evaluations of the EU activity in environment/climate change, and hydrogen energy, education, science and research, culture and civil society interactions, economy and trade indicate possible ‘islands of cooperation’ and provide entry points for the EU Public Diplomacy action.

We recommend focusing EU public diplomacy in Russia on six: Environment/Climate Change; Science, Research, and Technology; Education; Health, Social, Culture.

Environment/Climate Change:

The theme of environmental protection is gaining more attention in Russia, mainly due to Russia's declared intentions to curb greenhouse gas emissions. The EU role in environmental protection is appreciated in Russia, which opens opportunities for bilateral cooperation.

Medium term

- Promoting norms of corporate environmental responsibility in business;
- Publicising ERASMUS+ funding calls and facilitating research and development cooperation projects involving civil society organisations. The activities may include cooperation with the Russian branch of *World Wide Fund for Nature* in implementing their projects in the region in consultation with local experts; supporting environmental projects implemented by local universities, including projects on biodiversity conservation, and development and implementation of green technologies.

Research, Science and Technology:

Cooperation in RS&T sphere is mutually beneficial as Russia is active in space exploration, nuclear and hydrogen energy . Cooperation in the sphere of energy should focus on these themes putting aside disputes over the Nord Stream-2. There can also be opportunities in the sphere of green energy cooperation despite certain politicization of this sphere.

Short term

- Solving the problem of higher EU requirements to applications from Russia (due to their quantity) currently as sending a wrong signal ('Russian applications should be super good to receive grants' - expert).

Medium term

- Expanding existing public diplomacy initiatives such as Erasmus+ and Jean Monnet, Marie Curie, Horizon programmes and other activities, focusing on social media, and targeting academics and youth;
- Facilitating joint projects with international regional organizations: Council of Ministers of Northern Countries; Council of the Baltic Sea States; the Nordic Council and the Black Sea Economic Cooperation.

Long term

- Supporting the highly valued by experts sectorial dialogues currently suspended due to politicization.

Education:

Educational programmes present an avenue to revise negative perceptions of the EU. Erasmus +; Jean Monnet, youth exchanges/EU study weeks are very popular in Russia. EU Public Diplomacy could develop tools to engage these programmes' alumni upon their return to Russia to promote further academic mobility.

Health:

Given the emergency context of the COVID-19 pandemic, we recommend:

Short term

Facilitating cooperation between the EU Commission, EMA and Russian authorities (mutual recognition of vaccines and vaccination certificates for travel).

MEDIUM TERM

- Promoting cooperation in medical research and joint actions to fight the COVID-19 pandemic (lack of such measures spoil the EU image in Russia).

Social:

Short term

- The EU is a good partner for NGOs working with people with disabilities, orphans, domestic violence victims, women empowerment ('not at the level of grand declarations, but in practice at the micro-level'). Limited-scope programmes in this sphere could be numerous and precisely targeted.

Medium term

- Promote urban/local projects and cross-border cooperation in the regions bordering the EU (Kaliningrad, Karelia, St. Petersburg) that are multifaceted (economy, culture, environment).

Culture:

Short term

- Pandemic hampers recovery of tourism. EU recognition of vaccination certificates issued in Russia (as is done already by the individual EU Member States) will significantly improve the EU image.

Medium to long term

- The visa regime could be facilitated for tourism, culture and business trips to ease people-to-people exchanges;
- Continue cultural public diplomacy activities (film festivals, book fairs, concerts, exhibitions) traditionally highly appreciated by all cohorts in the context of historical and cultural ties between Russia and Europe (in cooperation with the EU Member States and Russian creative industries). The contacts in the cultural sphere should remain outside of political disputes. Otherwise, almost the last link with Russia could be lost. Elites specifically stressed the success of initiatives undertaken by individual Member States;
- EU cultural initiatives and events should be held "on the ground" in Russia's regions in addition to traditional cities for the EU public diplomacy events.

Suggested partners in Russia

Experts identified two groups of potential partners for the EU in politically charged thematic areas: a) institutions and experts close to the Russian government or seen as organizations that understand the government's position b) organizations and experts already close to the EU and its values. The first group are long-term partners, including 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, EU info-centres run by Russian universities. Their experts should be involved in collaboration programmes development to ensure that local voices are

listened to. The second group of partners can include organizations as Memorial (watchdog), *Nezavisimaya Gazeta* (independent newspaper), EUREN network.

From the operational point of view, the EU Delegation in the short term will benefit from closer coordination with the Member States diplomatic representations in Russia. Russian experts seem to relate easier to the individual Member States' (most notably Germany, France, Italy, Spain) than EU programmes. Continuing the exchange with the EU Member States can help involve experts in EU public diplomacy activities. EU Public Diplomacy should coordinate its activities with these Member States as a gateway to a positive image of the EU. However, certain EU Member States (Poland and the Baltic States) are seen in Russia as fuelling potential conflict with the EU. Experts refer to Poland and Estonia programmes in Russia as 'self-serving'.

Tools

The EU public diplomacy should capitalize on *online instruments* across Russia's regions involving audiences previously not covered by the EU Delegation activities.

The mechanism of *fast and efficient exchange of information and opinions* on most recent developments between the EU Member States and the EU Delegation with their Russian counterparts will facilitate political dialogue.

In the situation of conflict attitudes become volatile. Public diplomacy initiatives should be supported by *extended public opinion and perception research* (especially on normative self-perceptions in Russia and in its regions, as well as of the EU's images vis-à-vis images of the 'emerging powers').

Nevertheless, the EU and Russia are interdependent, interlinked geographically, culturally, and historically. Moreover, their economies are complementary. Hence, their cooperation will continue in areas of mutual interest.

1.12. South Africa

This Country Chapter presents a synthesis of the South Africa-specific findings of traditional and social media analysis; interviews, focus groups and public opinion poll that were all conducted in the framework of this study. The Chapter follows the logic of the research design of the study at hand. We present the main findings for South Africa according to the research criteria applied – namely visibility; actorness and local resonance; and norm-setting. Moreover, in the section on actorness and local resonance, we discuss these according to the themes analysed in this study: economy and trade; political issues; development; social issues; environment; energy; science, research, and technology; culture; education; health (new perspective). The final section before policy recommendations looks at the local conditions that explain the perception of the EU in South Africa. We conclude the chapter with recommendations for the EU's public diplomacy in 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 about 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.

1.12.1. Sample

Public opinion

The online survey was coordinated and conducted by PPMI through an online panel provided by *Syno International*. The respondents in Brazil were surveyed in Portuguese. The data collection took place from 28 April to 16 May 2021. The sampling for the survey was designed to be nationally representative of age, gender, and regions. Respondent profiles in the Brazil were established based on data from the. Respondent profiles in South Africa were established based on data from Statistics South Africa³⁹. The survey included a total of 1158 individuals aged between 15 and 64 year old⁴⁰.

Media

The quantitative part of the media analysis which identifies the general trends in a large press media sample was carried out by PPMI. Five popular prestigious dailies *The Citizen*; *TimesLIVE*; *Mail & Guardian*; *Sowetan*; *The Sunday Times* and one business newspaper *Business Day* were monitored from 1 February to 30 April 2021. *Factiva* repository was used to aggregate content from both licensed and free sources and in-house data processing was applied to produce the results.

Two separate datasets in English language were collected over the period of observation – «EU» (296 articles) and «Europe» (1083 articles). Search terms for the dataset "EU" are: "European Union", "EU", "European Commission", "European Parliament", "Court of Justice of the European Union", "EU presidency", "EU Council", "European Council", "Council of the European Union", "Eurozone", "European Central Bank", "European Investment Bank", "European Medicines Agency". The search terms for the dataset "Europe" are "Europe", "European" and "Europeans". The search terms for "EU" and "Europe" datasets consider both plural and singular forms as well as possible grammatical forms of the search terms in the local language. Europe dataset excludes articles containing any of the "EU" dataset keywords.

The qualitative media content analysis was designed, supervised, and coordinated by experts from Public Diplomacy and Political Communication Forum (PD-PCF), University of Canterbury (UC), New Zealand, and conducted by local researchers trained by the PD-PCF. PPMI collected the media sample (40 articles) using the search engine from two prestigious newspapers *The Citizen*; *TimesLIVE* and one business newspaper *Business Day* for country expert for in depth qualitative analysis. The exact time frame of observation remained the same. Experts applied elements of content, cognitive and critical discourse analyses.

Social media

PPMI carried out the social media analysis. The data collection process was automated using the online social media monitoring tool *Mediatoolkit*. Social media posts were collected from Twitter, Facebook

³⁹ Statistics South Africa. <http://www.statssa.gov.za/>

⁴⁰ Detailed public opinion survey data are available in Annex II of this Report – Comparative public opinion survey report.

and Instagram with the use of automated queries. Coverage of the EU was traced using a set of the EU-related keywords:

“European Union”, “EU”, “European Commission”, “European Parliament”, “Court of Justice of the European Union”, “CJEU”, “EU presidency”, “EU Council”, “Council of the European Union”, “European Council”, “Eurozone”, “European Central Bank”, “European Investment Bank”, “European Medicines Agency”. All the keywords were additionally traced in one-word format to capture related hashtags: europeanunion, europeancomission, europeanparliament, courtofjusticeoftheeuropeanunion, eupresidency, eucouncil, europeancouncil, counciloftheeuropeanunion, europeancentralbank, europeaninvestmentbank, europeanmedicinesagency. Europe-specific keywords used for filtering relevant social media posts are “Europe” and “European”. Europe dataset excludes posts containing any of the “EU” dataset keywords. Additionally, a location filter was used to ensure that the collected mentions originate from South Africa. A language filter was set up to collect posts in English.

The resulting sample of South African social media posts collected from 1 February to 30 April 2021 includes 45843 mentions, of which 16291 are of the EU and 29552 of Europe.

Working with social media platforms, the Project Team followed each platform’s terms of use. All identifiable information of individuals from social media data remains confidential and is removed before the publication of findings. Computational analyses of the samples involve only contents from media databases’ public websites – posts that are available to general audiences. No generalised conclusions that might cause any potential harm to identifiable communities are drawn from social media analysis.

Interviews and focus groups

Interviews and focus groups were designed by experts from the PD-PCF and University of Canterbury and conducted by local researchers. Ten students took part in the focus group, conducted over Zoom. All ten students are based in the Faculty of Humanities in various disciplines (8 female students, 2 male students). Seven of the students are black South African and three white. All of the students have had interactions with Europeans in South Africa. The majority also have friends or family in Europe. Only two, however, have visited Europe: (Italy for two weeks and the Netherlands for three months with a visit to Portugal as well).

1.12.2. Visibility

The key data to evaluate the EU visibility in South Africa are public opinion poll and media analysis.

The top 5 terms associated with the EU are positively inclined. In descending order, the terms are “modern” (42.1%), “efficient” (37.5%), “strong” (37.2%), “peaceful” (36.7%), and “united” (32%). The EU tops the order in “peaceful” category but is surpassed by various countries in the rest. South African public considers China (39.2%), Japan (43.8%), US (44.5%), and Russia (50.2%,) to be stronger than the EU, US (55.4%), Japan (53.6%) and China (44.6%) more modern, China (37.9%) and Japan (45%) more efficient and Japan (34.4%) more united. Of all the countries on the list only Japan surpasses the EU in trustworthiness (23.6% compared to 22.7%).

Compared to the 2015 Baseline Study, the share of respondents who attribute to the EU various positive descriptors has increased by ten percentage points on average, with the highest increase in “peaceful” category (18.5%).

South Africa is one of the countries of which respondents were asked to choose descriptors. On average 24% of respondent attribute various positive descriptors to their own country. One notable exception multiculturalism. Sixty-two percent of respondents in South Africa believe their country to be multicultural, this being the highest share of respondents to attribute any positive descriptor to any of the countries on the list. Of all the negative descriptors attributed to the EU attributes “hypocritical” with 9% is the most attached to the EU in the eyes of the public in South Africa (decrease by three percentage points from 2015).

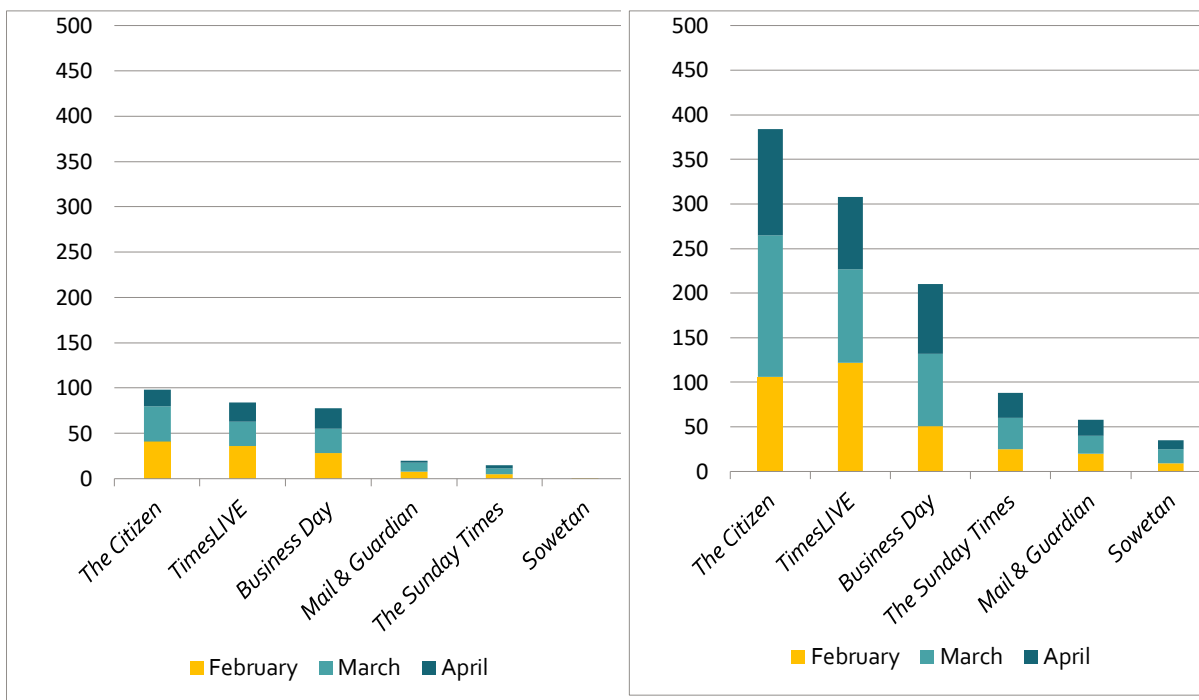
Perceptions of EU activities in a wide range of activities are overwhelmingly positive, with strong percentage majorities (60-80%) ranging from “very good” to “fairly good” and have improved compared to 2015 by twelve percentage points on average. The most positive images were linked to the development of new technologies (82.6%, increase from 66% in 2015), global trade (86.2%, increase from 73.4%), industrial development (80.9%, increase from 66.3%), tourism (81.8%, increase from 74.9%), science and research and technology (80.8%, increase from 69.4%). These strongly positive perceptions likely stem from the ubiquity of an elite European presence in South Africa, particularly surrounding areas such as luxury goods (e.g. cars). The visibly presence of European products and services also explains the very small percentage of responses in the “do not know” category, which in almost all instances was below 5% (except for space exploration technologies at 7.9%). In 2015, the “do not know” answer for each category was chosen by 12% of respondents on average.

Overall, *media* coverage of «Europe» was significantly higher at 78% throughout the whole period than the «EU» and its’ institutions at 22%. Data shows that «EU» had a slightly higher *media* visibility in February (40.2%) and March (36.8%) compared to April (23%). Coverage for «Europe» was slightly higher in March (38.4%) compared to February (30.7%) and April (30.8). *The Citizen*, *TimesLIVE* and *Business Day* had much higher coverage in both datasets than the other three newspapers. A similar trend was registered for «Europe» dataset, *The Citizen* was the most covered outlet, followed by *TimesLIVE* and *Business Day*.

FIGURE 100. VOLUME OF NEWS ITEMS WITH A REFERENCE TO THE EU AND EUROPE IN TRADITIONAL MEDIA. SOUTH AFRICA

EU

EUROPE



The degree of major centrality for EU articles was low for all traditional media outlets. *The Citizen* had 8.2% of centrality, *TimesLIVE* 8.3%, and *Mail & Guardian* 10%. The remaining sources did not portray EU as a central topic. Overall, a low degree of centrality in quantitative analysis shows that the EU and its institutions were not profiled as the main actors in the news story.

The qualitative analysis of South African articles focused on the EU revealed that very few were either specific to EU-South Africa relations or written by South African journalists. Instead, the vast majority of articles were reprinted from international sources, especially Agence-France Presse (AFP) and the Associated Press (AP). The handful of articles specific to South Africa related to trade issues (poultry and textiles). These results were further buttressed by numbers from the larger quantitative media analysis. In that analysis, the EU was a major actor in less than 10% of articles in any of the six newspapers reviewed. These figures were not dissimilar from the 2015 study, which assessed three rather than the six media sources in the study. The overall trend remains that few articles by South African journalists about the EU are written; and in most cases where there is reference to the EU, it is in the context of South Africa-EU trade relations. However, it seems one difference with the 2015 study is that more trade articles written by South Africans were published then (mostly in *Business Day*) than today. This could simply be a sample aberration, but it is notable.

Europe visibility in *social media* was higher than that of the EU by about 7% with the smaller peak in Europe-related posts on 19 April is linked to the discussion around the creation of the European Super League.

A peak on 18 April in the EU-related social media posts was generated by the brief discussion around opening of a cannabis cultivator in Lesotho and much wider discussion regarding the political situation in Ethiopia was widely discussed, including the ongoing elections and the Tigray conflict in the northern part of Ethiopia.

Member States and MSs' leaders' visibility, EU institutions and EU leaders' visibility

In both «EU» and «Europe» datasets among the EU institutions, the European Medicines Agency was mentioned the most – 32 times in South African *media*. The media paid slightly less attention to European Commission (18) and European central bank (11), European Council (9) and European Parliament (6), European Investment Bank (3). Other EU institutions were not mentioned in the media articles. In 2015 the most visible EU institutions were the European Central Bank, European Commission and the European Parliament.

The detailed QL media report showed that much of the visibility given to EU institutions or leaders was driven by reporting around the COVID19 pandemic. The most visible EU official was Commission President Ursula von der Leyen, specifically because of her central role in the vaccine rollout in Europe. The EMA was also prominent in most articles referring to the crisis of confidence in the AZ vaccine. On a separate note, the most visible EU MS was France, in reference to the rise of the populist right under the leadership of Marie Le Pen. The French example and the earlier examples of stuttering EU efforts contending with the pandemic were illustrative of a generally difficult year for the EU rather than an overtly negative perception of the EU in the South African press.

As with the current study, media references to EU leaders in 2015 largely centred on the key news issues of the time. The Eurozone and Greek crisis were the most cited items of the period.

In traditional media the most mentioned heads of states are president of France Emmanuel Macron (21 mentions), chancellor of Germany Angela Merkel (15) and prime minister of Slovakia Eduard Heger (6) (in 2015 the most visible EU politicians were prime ministers of Greece and the UK Alexis Tsipras and David Cameron, and German chancellor Angela Merkel). The most visible EU officials are president of the European Commission Ursula von der Leyen (18 mentions), president of the European Council Charles Michel (7) and EU High Representative Josep Borrel (3).

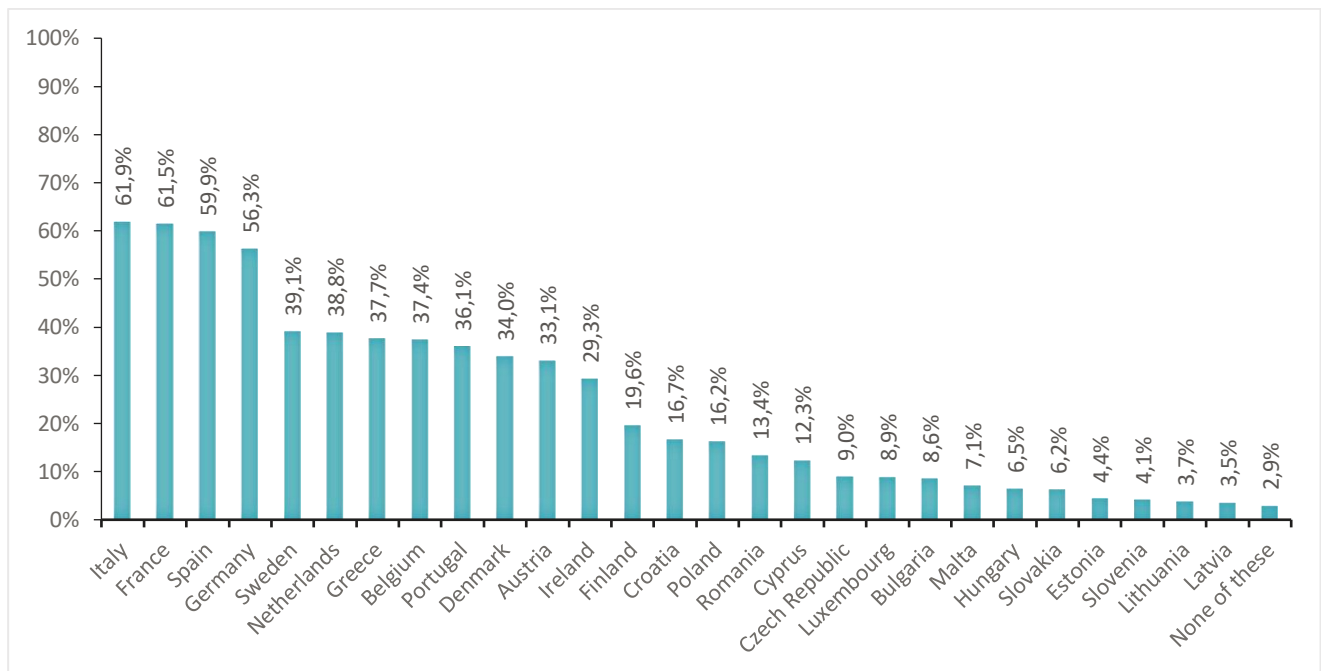
The most mentioned Member States in traditional *media* are France, Germany and Italy with most mentions being associated with Europe rather than the EU. Several countries were mentioned more often in “EU” news compared to other countries – Denmark (50%), Germany, Italy, Belgium (44%), Sweden (43%), France (42%).

Each Member State was mentioned within the corpus of South African *social media* posts. Germany (809), France (645), Italy (498), Ireland (415), and Spain (400) were the most mentioned Member States. Notably, a considerable share of mentions is found in EU-related feed.

Among the EU institutions, European Commission was the most visible with 316 mentions in South African *social media*. European Medicines Agency (234 mentions) and the European Parliament (128) were also visible, followed by the European Council (49), the European Central Bank (41) and the European Investment Bank (41).

The most attractive Member States somewhat correlate with the most popular Member States in media and social media. The perceived attractiveness of EU countries shown in the public opinion poll with Italy (61.8%) mentioned as the most attractive EU country, followed by France (61.5%) and Spain (59.9%).

FIGURE 101. ATTRACTIVENESS OF THE INDIVIDUAL EU MEMBER STATES. SOUTH AFRICA



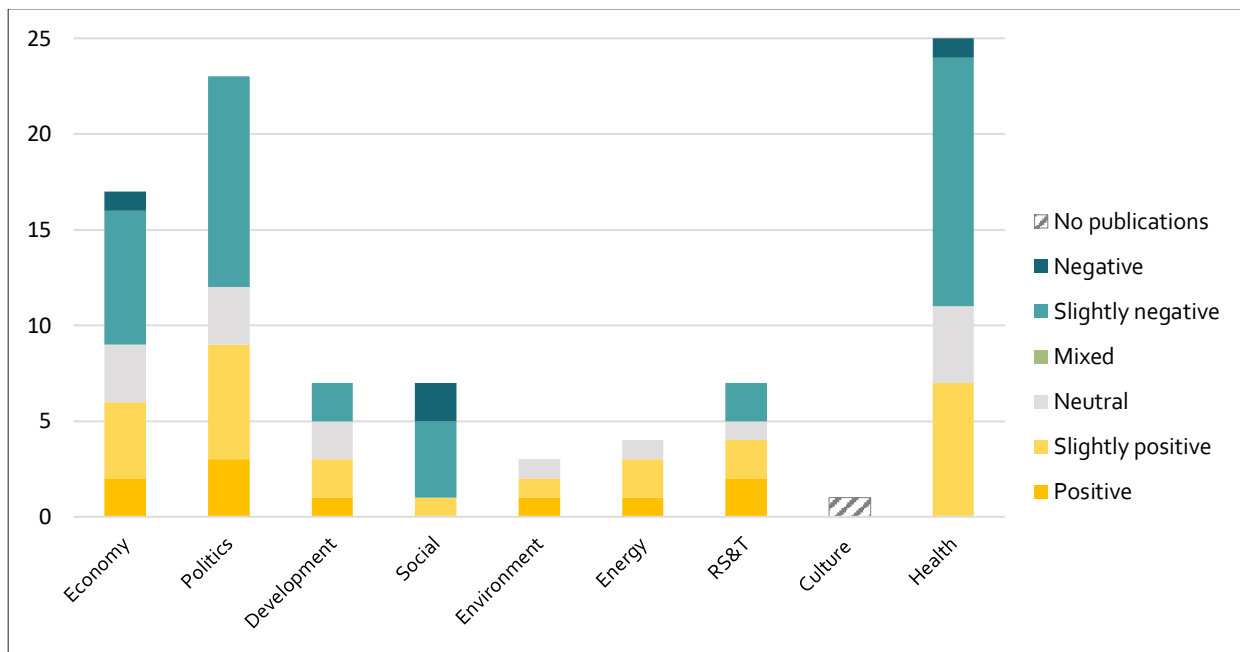
Note: based on Q25: Please indicate which European countries look the most attractive to you? (n=1157). Each respondent could choose more than one country.

Emotive charge

The overall evaluation of the EU in the South African media set under automated quantitative analysis is mostly neutral (38% of the sample) and slightly positive (43%). *Sowetan* newspaper’s sample of articles reporting on the EU is too little to be evaluated.

In the articles which present the EU as a principal subject the highest share of articles (42%) portray the EU in a slightly negative tone. The three most visible themes in this sample are health (52% of articles in slightly negative tone), politics (48% - slightly negative) and economy (41% - slightly negative).

FIGURE 102. EMOTIVE CHARGE IN PRESS ARTICLES REPORTING ON THE EU AS A PRINCIPAL SUBJECT. SOUTH AFRICA



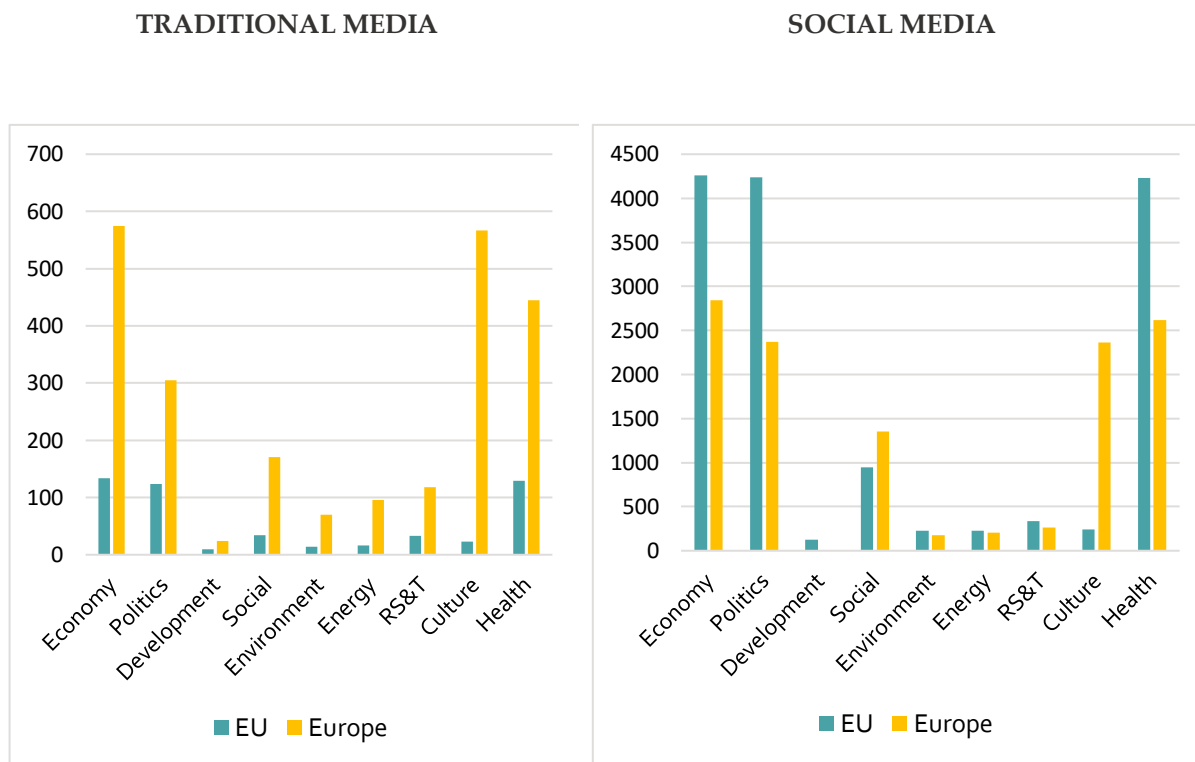
Note: Based on qualitative media analysis conducted by country experts.

Discerning an ideological motivation for the selection of stories is difficult (i.e. that the papers were known for being ‘eurosceptic’ or, perhaps more relevant in the South African context, wary of the Global North). Instead, it is likely the EU’s “own-goals” in the early administration and procurement of vaccines that created a topical source of international news. Generally, however, mainstream international news sources tend to mute highly emotive language as most articles are simply republished from international sources. However, for locally authored pieces, language is a bit stronger and mostly negative. On the issue of poultry, terms like ‘predatory dumping’ and links to ‘kill(ing) thousands of jobs’ were made. The one positive article in the QL media report on EU-South Africa relations (on textile trade opportunities) was in fact penned by the EU Ambassador to South Africa, Riina Kionka. It used terms and phrases like “innovative channels” and «EU»s commitment to the region’. The international sources frequently referred to the negatively charged term ‘vaccine nationalism’. In 2015 the media sample was largely neutral, mostly because factual and mostly value-neutral international articles were simply republished in the South African press. Some negative framing was discerned in coverage of EU-South Africa trade relations.

In comparison with traditional media, emotive charge of the EU-related *social media* posts is predominantly negative (43.9%). The three most visible themes in both the EU and “Europe” datasets are politics, health, and economy. For all the three themes in both datasets the biggest share of posts (between 42% and 50%) are written in negative tone.

In observed South African *media*, the “EU” is most often mentioned in connection with the economy (26%), health (25%) and political (24%) thematic frames. For “Europe” economy (24%), culture (24%), health (19%) had the most coverage. Contrastingly, “Europe” dataset had significantly higher coverage on culture theme (24%) compared to EU (4%). *Business Day* focused more on the economy theme and *Sowetan* on culture theme compared to other outlets. *Sowetan* was the source of only two articles in the “EU” dataset. For both “Europe” and “EU” development (1-2%), environment (3%) and energy (3-4%) themes were covered significantly less.

FIGURE 103. THEMATIC FOCUS OF SOCIAL MEDIA AND PRESS ARTICLES REPORTING ON EU AND EUROPE. SOUTH AFRICA



In South African *social media* posts, the EU was overwhelmingly mentioned with regard to the economy (29%), health (29%), and political issues (28%). Apart from social (6%), other thematic frames were less visible, constituting 2% of all mentions for each theme. In comparison to the EU, thematic distribution within Europe-related feed was similar. However, Europe was much more often mentioned in connection with culture.

The thematic distribution of articles about the EU and Europe is consistent with results in the focus groups and interviews, where the EU economy and trade relations with South Africa were prominent. Similarly matching results linked the importance of the EU politically, whereas less prominence was given to social and cultural dimensions.

The information on the EU offered to the South African public by the from international news sources without a South Africa focus. In instances where South Africa was indeed the “local hook” of a press article the topic is trade related, including several stories about perceived unfair EU poultry dumping policies. One Op-Ed in the Business Day on textiles presents the trade arrangement between the EU and South Africa as an opportunity for exporters from the latter.

The majority of the news articles in the *media* do not specify sources of information. The most cited international sources for «EU» news were *Agence France-Presse* (46%), *Financial Times* (21%) *Reuters* (12%). Other, less visible news agencies were *Bloomberg* (4%), *CNN* (4%), *New York Times* (4%), *BBC* (4%), *Reuters* (3%), *The Conversation* (3%). The remaining international sources received less or no attention at all.

Continuity and change behind visibility and emotive charge

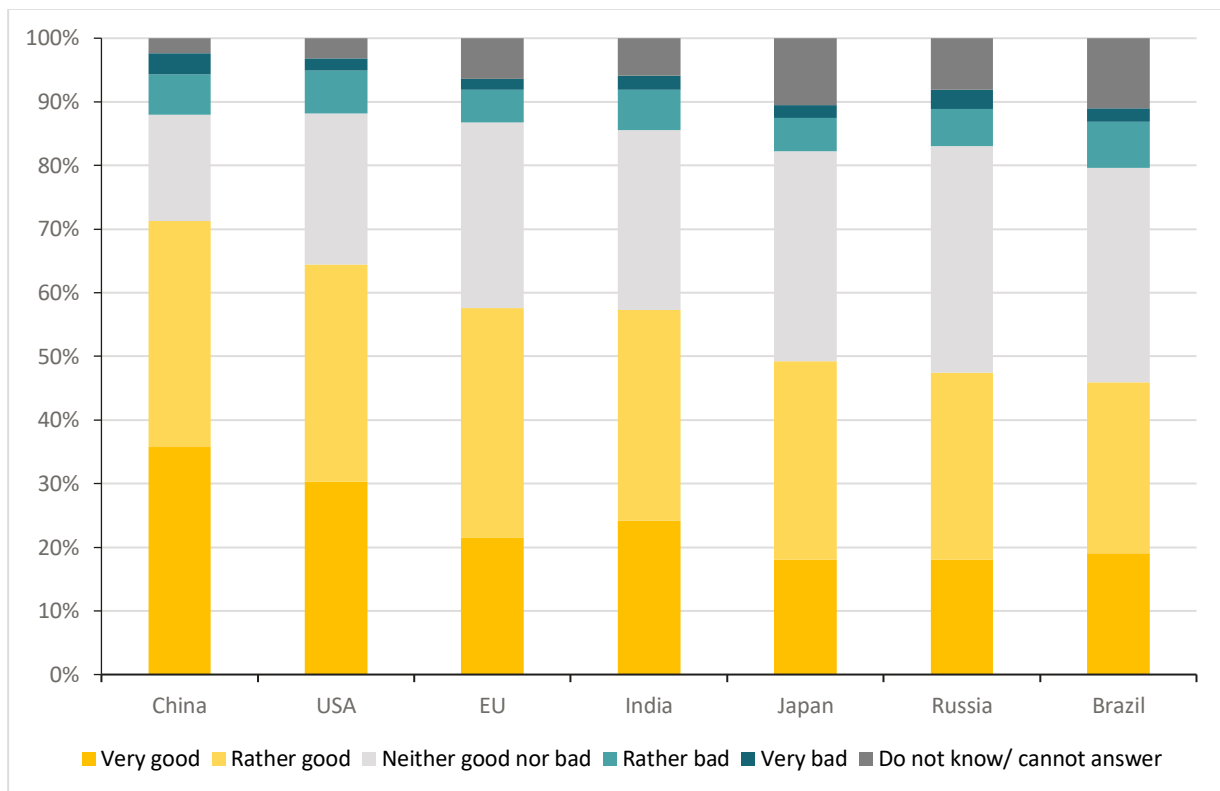
Relative to the 2015 South Africa country report, the EU's visibility, and centrality of the EU news in the media has declined. In 2015 the Eurozone crisis, the burgeoning discussions around the United Kingdom's EU membership, migration flows across the Mediterranean all served to heighten the organization's visibility. In the current era, most of the attention has gone to the COVID-19 pandemic. Moreover, South Africa was hardly mentioned in articles concerning the EU, as was the case in 2015. While the contentious issues of migration and the EU was a topic referred to as a negative emotive charge in 2015, it did not factor this time around. EU gets moderately negative coverage was in its poultry trade dispute with South Africa.

1.12.3. Actorness and local resonance

The EU as a partner

Very prominent majorities either strongly agree or agree that the EU is an important (78.8% compared to 68.1% in 2015) and trusted (69.5% compared to 57.8% in 2015) partner country to South Africa. Most believed ties should be strengthened even more (69% almost equal to 68.2% in 2015) while also acknowledging the important of the EU for education exchanges (66.8% compared to 61.3%). Less than 10% of respondents disagreed or strongly disagreed with partnership with the EU. Except for 5.8% of respondents who were unable to comment on the EU as a partner for education with South Africa, in all other instances those who could not answer the question represented less than 4% of respondents. This is indicative of the high level of awareness, even if admittedly sometimes vague, of the European Union in South Africa.

FIGURE 104. GENERAL EVALUATION OF SOUTH AFRICA’S RELATIONSHIP WITH THE EU AND OTHER COUNTRIES



Note: based on Q3: Which of the following words best describes your country’s overall relationship with each of the following countries and organisations? (n=1158)

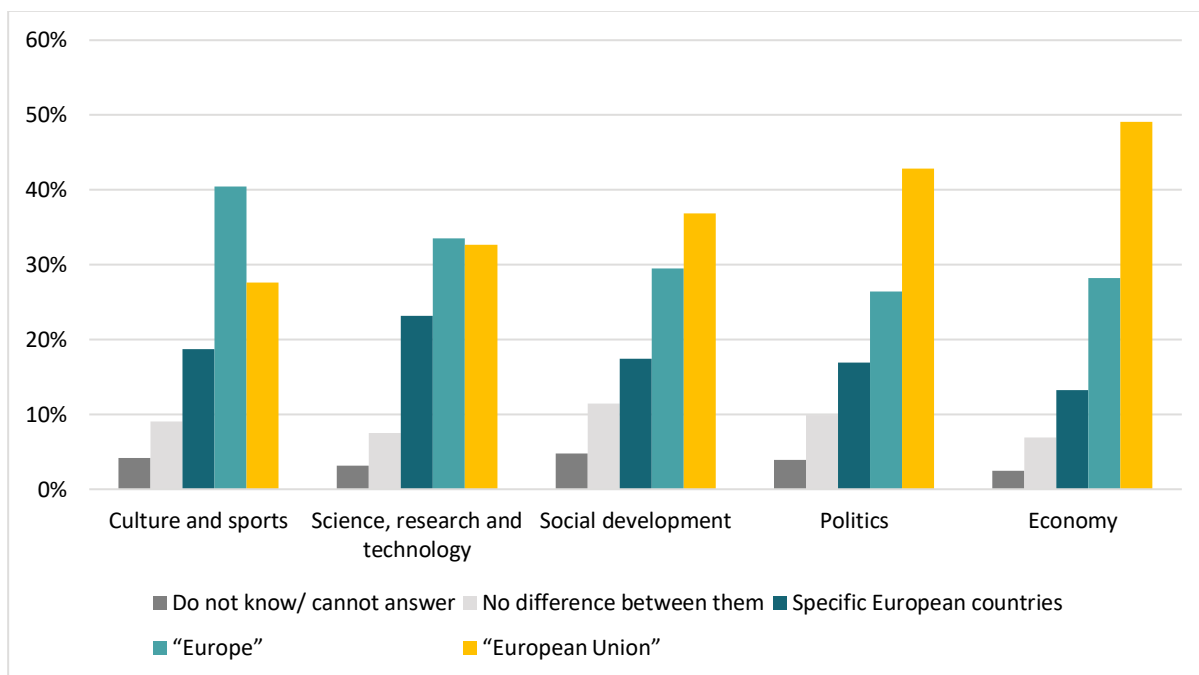
Importance of the EU in selected fields

There is an interesting disconnect between the survey results and student focus group sentiments. The focus group shows much cynicism about the EU, arguably an extension of larger views about the place of South Africa (and Africa in general) vis-à-vis the Global North. One opinion repeated by several participants is that the EU is self-interested and does not really “care” about South Africa’s plight. These sentiments are more nuanced in the elite interviews, where participants can elaborate in greater detail about perceptions of the EU. Yet the theme of how genuine the EU is in South Africa persists, just as it did in 2015 where most interviewees also expressed a degree of scepticism about the EU’s motivations in South Africa beyond those of nicely packaged self-interest.

Economy and trade

The media framing of the EU’s economic news is largely focused on the fallout from the COVID-19 pandemic. This is true across the sampled newspapers. Articles mostly came from international sources, therefore lacking a local South African connection or particularly emotive language. However, given the negativity surrounding the consequences of the pandemic, as well as exacerbation of the problem linked to the EU’s toiled vaccination rollout program, articles focused on the economy tended to be more slightly more negative than positive or neutral. Articles linking the EU and European economy to South Africa were mostly published by Business Day and centred around trade issues (specifically poultry).

FIGURE 105. ASSOCIATION OF DIFFERENT AREAS TO THE EU VERSUS EUROPE. SOUTH AFRICA



Note: based on the answers to Q22: Some people think about Europe, whereas others think about the European Union when talking about economy, politics, culture, sports and other areas. In your case, which term – Europe or the European Union - comes to your mind first when you think about the following subjects? (n=1158)

**Please note that in 2015, this question was accompanied by a chart in a different format under the section “Research, science and technology”. The wording and answer categories used in this question have changed in 2021, making it inappropriate to conduct historical comparisons.*

Elite and students’ interviews elicited a mixed reaction: that is, elements of historic distrust and even resentment of the West with a pragmatic wish to expand trade and investments with a perceived global trade superpower. Students were less circumspect about the EU’s economic engagement with South Africa, sometimes characterizing it as exploitative. “Africa keeps getting its lunch taken away” (YZAF1); the EU had no incentive to engage in an “honest dialogue” with the continent because it was “winning” (YZAF2).

Public opinion polls reveal a strong association of the EU to economics. Forty-nine percent of respondents associate the domain of economy with the EU and - 28% with Europe). Very close numbers (46% and 27%) were presented in the 2015 baseline Study.

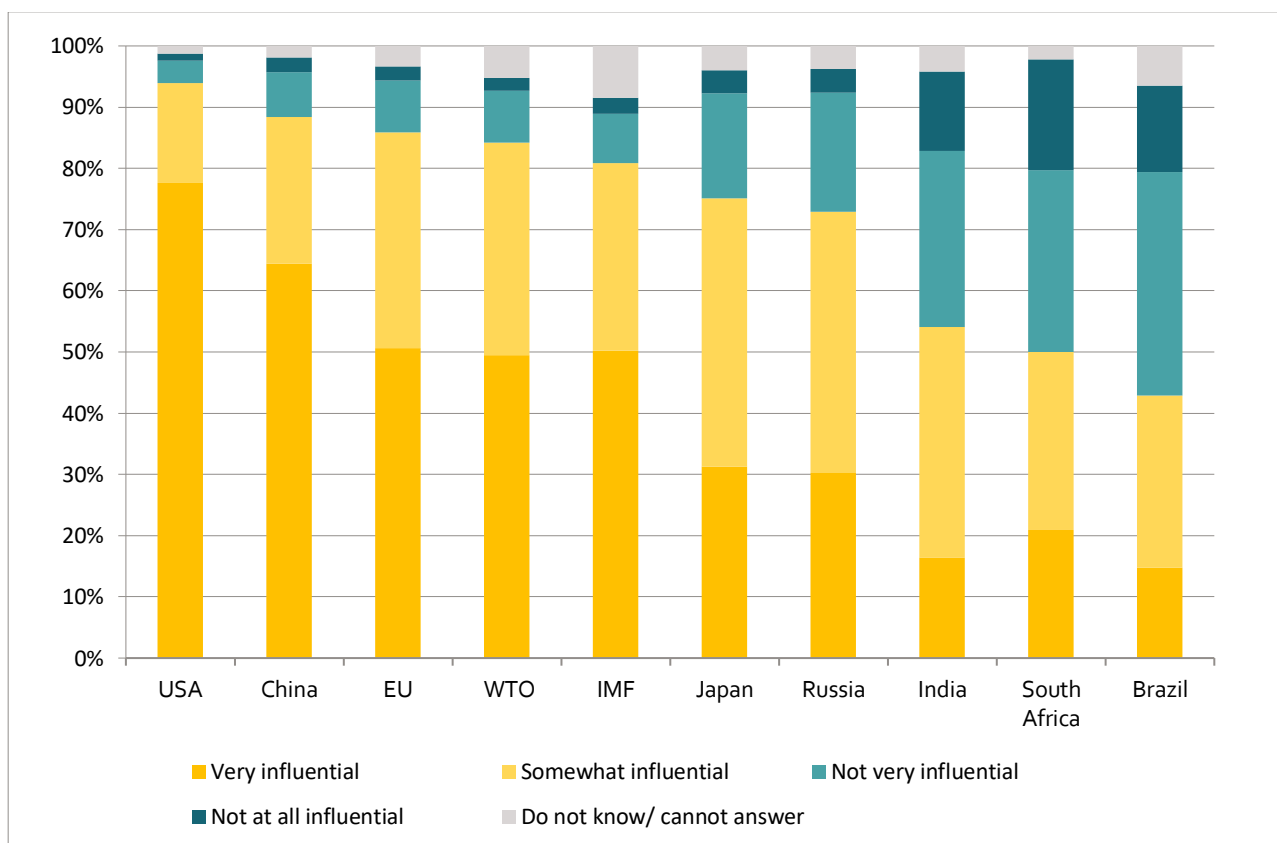
In terms of perceptions of economic influence in global affairs, the EU (85.8% of respondents believe it to be “very influential” or “somewhat influential” compared to 79.1% in 2015) ranks behind the US (93%) and China (88.4%), and approximately equal to the WTO (84.2%) .

Furthermore, large majorities of opinion poll respondents believed economic ties (e.g., trade and finance) between the EU and South Africa were important and should be even further strengthened. Seventy-eight percent of respondents believe the EU to be an important trade partner for South Africa (64.4% in 2015), 73% believe the EU to be an important investor in domestic economy (63.5% in 2015), and 75.1% believe bilateral relations should be strengthened (71.4% in 2015). However, there was a strong contrast in how benign EU trade policies were perceived to be. When asked if the EU was protecting its market at the expense of others, approximately 60% strongly agree or agree (an increase

from 48.2% in 2015). It is also important to underline that once again few respondents did not know enough to answer the questions, reinforcing how high general awareness of the EU was.

Yet there is a point to be made that polling data does not necessarily capture the degree of knowledge or understanding of the EU, but more a general perception of it. This is an important point to capture: there is plenty of space still to shape perceptions of the EU given the “light” knowledge about it.

FIGURE 106. EU INFLUENCE IN GLOBAL ECONOMIC AFFAIRS COMPARED WITH COUNTRIES AND INTERNATIONAL ORGANISATIONS. SOUTH AFRICA



Note: based on the answers to the survey Q6: In your view, how influential, if at all, in global economic affairs are the following countries and organisations? (n=1158)

Politics

Politics is another domain associated by South Africa public predominantly with the EU (43%) rather than with Europe (26%). In the South African media references to the EU in a political context are largely limited to leadership surrounding the global vaccination campaign against COVID-19. Given both the EU’s sputtering implementation of its own vaccination regime, plus accusations of Western “vaccine nationalism”, most of the framing of the EU as a political actor was negative.

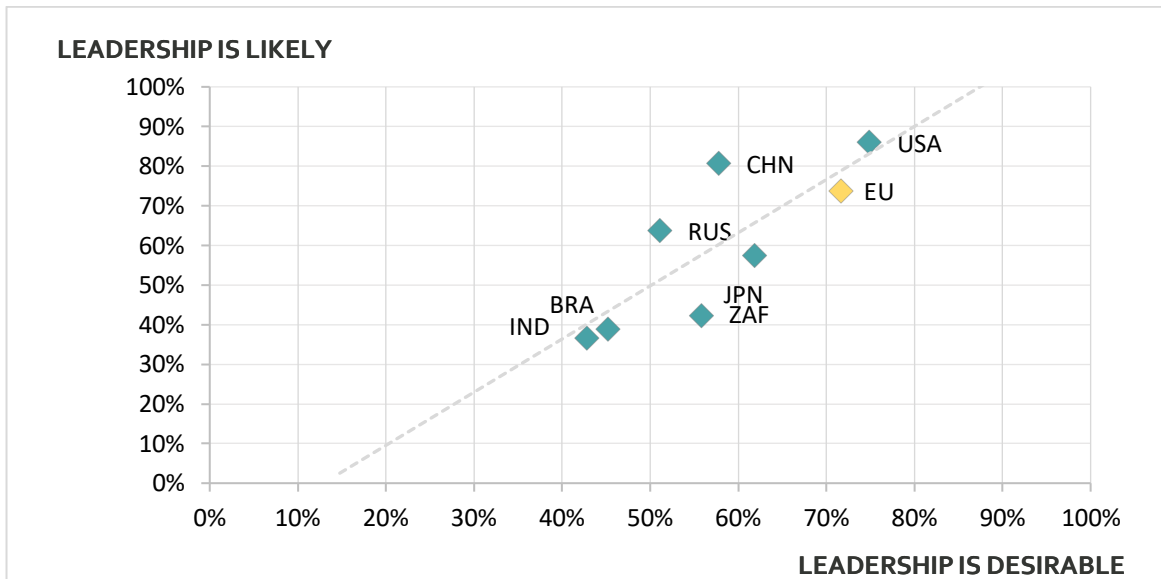
In focus groups and elite interviews, similar sentiments are echoed regarding what was perceived as the EU’s unhelpful stance towards the swift distribution of vaccines beyond the Global North.

Public opinion respondents by contrast show largely positive, if sometimes tepidly so, sentiments towards the EU’s role in political affairs. Eighty-three percent of respondents believe the EU to be very important or somewhat important in maintaining global peace and stability (79.5% in 2015). In this regard the EU follows the UN (87.6%) and the US (85.5%).

This is likely because the poll offered a broader range of categories for EU global influence relative to most of the interpretations of interviewees, which given the pandemic remained largely centred on COVID-19. More specifically, where the EU does best in polling is in support for regional and international cooperation (70.8%), fight against climate change and protection of the environment (72.2%), justice and rule of law (68.7%), foreign policy and peacekeeping operations (68.3% for both), and media freedom (67.4%). Compared to 2015, positive evaluations of the EU performance have increased by ten percentage points on average. However, in dealing with refugees and displaced people, the EU gets its least enthusiastic approval, with a small majority rating it very or fairly good (56%, an increase from 46% in 2015) and the rest either neutral or fairly to very bad.

The EU (72% compared to 67% in 2015) follows the US as the second most desirable global leader in the eyes of South African public, but when it comes to estimations of the likelihood of the global leadership the EU (74% compared to 66% in 2015) trails the US and China.

FIGURE 107. DESIRABILITY VS. LIKELIHOOD OF EU’S GLOBAL LEADERSHIP COMPARED TO OTHER ACTORS. SOUTH AFRICA



Note: based on the answers to survey Q4: How desirable is that each of the following countries and organisations take a strong leadership role in work affairs? And Q5: how likely or unlikely is it that each of the following countries and organisations will take a strong leadership role in world affairs five years from now? (n=1158) The horizontal axis presents the sum of “Very desirable” and “Somewhat desirable” responses to the Q4. The vertical access presents the sum of “Very likely” and “Rather likely” responses to Q5.

Climate and environment

Several articles refer to the EU as an actor in fighting climate change. The framing, however, was largely limited to adaptation in the automotive sector and the growth of the electric car industry. One article included climate change as part of a wider discussion about geopolitical contestation. Commission President Von der Leyen is quoted underlining the need for the EU to work with China, despite that country’s “coercive behaviour” in other domains.

Polling data showed that all of the major global actors were considered very or somewhat important to fighting global climate change and protecting the environment. The EU (82.1%, an increase from 76% in 2015) and the US (80%) are considered slightly more important than the rest following only the UN (82.8%). Very few respondents do not know enough about the actors to answer the question.

Energy

The press does not cover the theme in a substantial manner with only 4 press articles which present the EU as a principal subject discussing energy (all in positive or neutral tone). In quantitative analysis media dataset majority of the press articles in this theme (96 versus 16) belong to “Europe” rather than the EU subset. In social media posts the theme gathered only 1% of the EU and 2% of Europe related posts with majority of the posts written in neutral or positive tone.

The theme does not appear in interviews with the experts in South Africa and does not attract attention of the focus group participants.

Development and assistance

The framing of the EU as a development actor played a much less prominent role in the South African media. Unless interpreted through the prism of vaccine assistance to countries of the Global South -- of which there were several articles -- not a single article examined the EU’s development agenda in South Africa or beyond.

This framing is echoed in the interviews and focus group, where the EU was acknowledged as a development actor, but very little about it in this domain was said. Instead, focus invariably returned to economic and political issues.

The polling data provides a more comprehensive perspective on images of the EU as a development actor. For instance, in terms of supporting developing countries, the EU was perceived as a “very important” or “somewhat important” actor by most respondents (86.2% compared to 77.7% in 2015); this ranked it below only the UN (86.9%) World Bank but and above US (85.4%), World bank (83.7%), and China (76.9%).

Together with the 2015 results, a somewhat perplexing inconsistency is evident: that is, while polling data shows cognizance of the EU as a development actor and strongly acknowledges its importance in the South African context, media attention, and focus group and interview interest is much less apparent. It is a curious gap that could be addressed through more public diplomacy efforts.

Social

In the media, few articles contain a social dimension to them, unless -- again -- in the context of the COVID-19 pandemic. Curiously, on the historically hot-button issue of African migration and the EU, the only reference (negative) made concerned the rise of the far right in France under the guidance of its leader Marie Le Pen. This may be because South Africa faces its own migration challenges as a southern pole for African population movements.

Public opinion respondents revealed a generally very high opinion of the EU on a range of social indicators. The EU (38.6%) overscores Europe (29.5%) in terms of the number of respondents who associate the domain of social development with it. The EU scores highest in terms of perceived performance in education (84.4% of respondents sees it as very good or fairly good, an increase from 70.4% in 2015). Similarly positive perceptions are noted for quality of life (81.2% in 2021 and 67.3% in 2015), employment opportunities (74.3% and 57.5%), equality between men and women (70.6% and 61.8%) and climate activism (70%). The EU’s performance in the integration of migrants and refugees gets the lowest share (53.6%) of positive evaluations with an increase from 41.5% in 2015.

Science, research and technology

The public in South Africa links theme of science, research and technology almost equally with the EU (32.7%) and Europe (33.6%). For significant share of the respondents (23.2%) the themes is associated with specific European countries. The press coverage of the theme is limited with 118 articles in Europe

and 33 in the EU qualitative analysis media dataset and only seven mentions of the theme in the articles which discuss the EU as a principal subject. On the social media the theme accounts for 2% of posts in the EU and 3% in “Europe” dataset with about 70% of posts in positive or neutral tone. The theme does not attract attention of the experts and focus group participants.

Overwhelming majority of the South African respondents believes the EU to be an important actor in advancing innovation and technological progress (85.8% compared to 76% in 2015), but the EU still trails behind the US (92.6%), China (91.1%) and Japan (89.3%).

Culture

In the category of culture, perceptions of the EU meld with perception of Europe as a whole. Significantly higher share of South African respondents associates the theme of culture and sports with Europe rather than the EU (40.4% versus 27.6%), and 18.7% with specific European countries.

As a major global purveyor of cultural goods and sports, the reach of Europe in South Africa is profound. Europe’s visible presence is arguably strengthened by the colonial heritage of the country and the continued deep links between segments of the population and the Old World. The EU (European) culture and lifestyle are almost as attractive to South African respondents as their own – the two are leading the table in opinion poll result with 79.4% and 79.8% of respondents believing the culture to be very attractive or somewhat attractive (followed by the US – 77.4% and Japan – 76.8%).

Perhaps surprisingly, none of the media articles in the set analysed specifically dealt with culture and the EU (or Europe). However, if we were to include sport as part of European culture, the coverage of European football and, to a lesser extent, rugby and cricket would likely change the results.

In the interviews and focus group, culture came up as something of a contradiction. It is not seen as a priority, often coming last in terms of perceived importance for the South Africa-EU relationship. At the same time, acknowledgement of Europe’s global influence on culture was often noted.

More specifically, 82% of respondents positively evaluate European luxury goods and clothes (the highest evaluated domain), 81.1% cuisine, 80.6% lifestyle and arts. Seventy-five percent and more have very or fairly positive perceptions in a variety of sub-frames of EU culture, including the history, architecture, food, lifestyle, sports. Numbers are slightly less (67%) for perceptions of multiculturalism. Once again, these positive sentiments and the fields identified paralleled the 2015 study, showing increase of five percentage points on average in positive evaluations in all categories.

Health

In the media, the EU’s visibility as a global health actor was largely limited to its responses to the COVID-19 pandemic. Consequently, much of the EU’s behaviour in this area will be developed in the section on norm-setting below. Beyond norm-setting, articles about the EU and health focused largely on the challenges to member state healthcare systems from the pandemic and the slow vaccine rollout.

EU press coverage in this thematic frame demonstrates prevalence of the slightly negative tone due to the number of articles criticising the EU stance on global COVID-19 vaccines distribution.

Interview and focus group discussions made only fleeting reference to Europe’s vaccine rollout issues. Yet little was said about the EU as a global health actor either. This was instead more evident in the polling data that showed a large majority of respondents holding a positive perception of the EU as a global health actor.

Continuity and change behind actorness

The EU's overall image has suffered in recent years for several endogenous and exogenous reasons crises afflicting the Union, including Brexit and the COVID-19 pandemic. In terms of the latter, the EU is deemed to be in a precarious position vis-à-vis China. The EU would have to engage even more in South Africa to be able to compete with the new superpower. A sense that the EU had to get its "act in order" first is articulated by focus group participants students.

COVID has upended the successful initiatives that require people to people contacts – particularly climate change awareness week which was based on a format of public in-person events through universities and think-tanks. Somewhat unexpectedly, COVID helped to kickstart the use of South African personalities since experts from Europe could not travel to South Africa.

1.12.4. The EU as a norm-setter

Perceptions in the media sample about the EU as a norm-setter in this era have revolves around two core areas: responses to the COVID-19 crisis in terms of vaccine approval and distribution; and, less so, about the EU as a key player in the shifting geopolitical context of this era. With respect to vaccines, several articles focused on the EU and the European Medicines Agency responses to concerns about the safety of the AstraZeneca vaccine and in one instance the J&J vaccine. European attempts at mitigating some of the concerns voiced by Member States were well covered in the South African press, given the same safety concerns in that country. Some focus was also aimed at EU efforts to address distribution and procurement shortcomings in its vaccination rollout by imposing export controls. One article focused on the idea of a vaccine or "health" passport for international travel, with the EU effectively creating a set of standards by which international travel to Europe could be regulated.

In the geopolitical context, several articles refer to the EU as stuck between the growing rivalry between the US and China. The EU's insistence that it will not be forced to choose sides and can find a means of coexistence would have larger implications for norm-setting in an era that many anticipate will result in more clearly defined spheres of influence between China and the US.

Interviews and focus groups revealed an almost inevitable expectation of the EU to play a lead role in international affairs, even if sentiments about such a role, especially in the African context, were often ambiguous or even negative. Trade remained the chief area for perceived EU norm-setting influence, as virtually all those interviewed acknowledged the bloc's power in this area. Yet whether the EU was a "normative power" in the most positive sense was again less evident. Some saw the EU as simply motivated by the pursuit of access to markets and -- especially in Africa -- raw materials. "Africa keeps getting its lunch taken away" once participant noted.

Interestingly, while trade was seen as something almost utilitarian in the pursuit of growth and markets, the political dimension offered more nuance. The EU was generally acknowledged to be a rung below the US and China on the world stage, yet this position was also seen as one of influence, where the EU was less beholden to monetary interests and more to ensuring a set of global norms untethered from the specific interests of either China or the US.

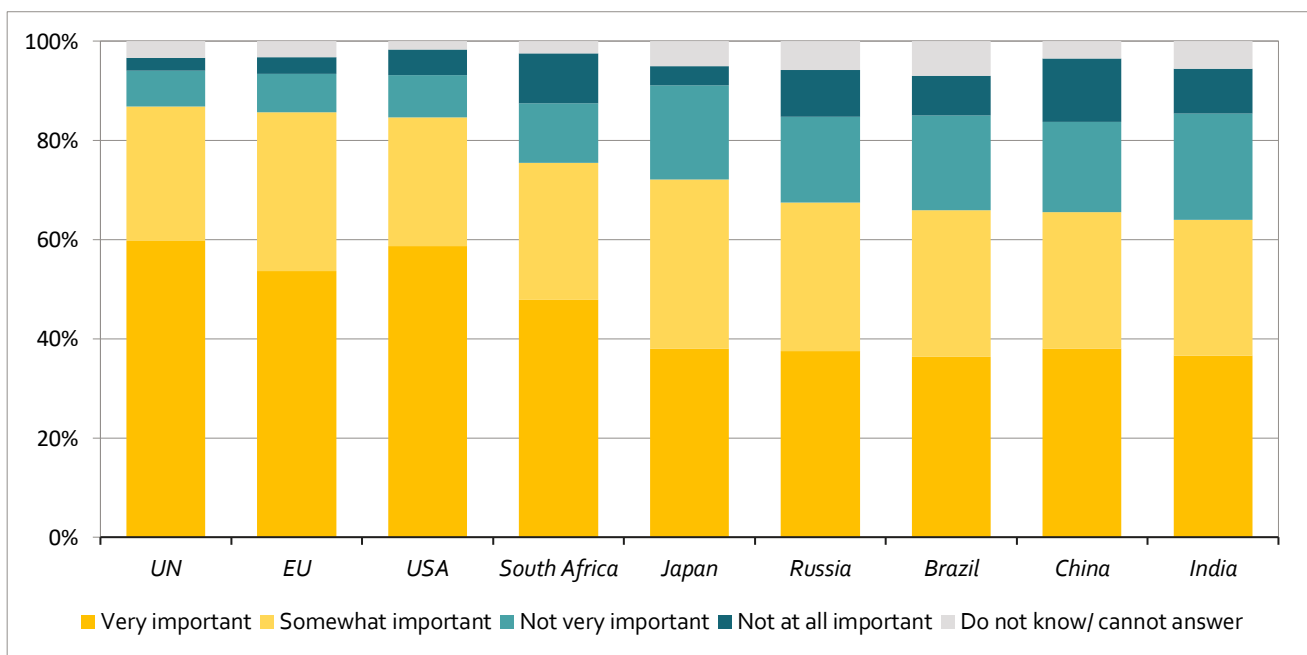
These sentiments were largely echoed in the public opinion perceptions which placed the EU (85.6% of respondents believe it to be very important or somewhat important compared to 79.3% in 2015) only behind the UN (86.8% in 2021) as the most important actor in promoting and defending human rights. In the area of norm and value convergence between the EU and South Africa, a larger majority of respondents believed the EU to be a good model for promoting equality between men and women (67.1% in 2021 compared to 57.1% in 2015). However, sentiments were more mixed when asked about whether South Africa and the EU shared the same democratic values. Just less than half agrees (48.1%,

increase from 36.6% in 2015), with more than a quarter neither agreeing nor disagreeing (28.2% in 2021 compared to 29.6% in 2015).

Nevertheless in 2021 opinion of South African public regarding the similarity of their personal values with the values of the EU have improved compared to findings of the 2015 Baseline. In 2015 between 50% and 68% of respondents believed different values promoted by the EU to be similar to their personal values. In 2021 results are improved by 11 percentage points on average with the highest gains of 16.3 and 15.5 percentage points in the values of liberty and respect for human dignity. Eighty-three percent of respondents believe their personal stance on respect for human dignity is similar or somewhat similar to the one promoted by the EU (the highest evaluation), 80.2% - liberty, and 78.8% - respect for human rights. Pluralism with 61.3% of respondents stating their personal views are similar to the EU stance has the lowest share of affirmative answers by the respondents.

Overall, however, the numbers are heartening in terms of how respondents perceived the similarity of individual values between themselves (as South Africans) and the EU. Vast majorities felt values were more or less similar in areas such as respect for human dignity, democracy, the rule of law, respect for human rights, justice, solidarity, and equality between women and men. Where numbers slightly diverged was on topics related to challenges often linked to race and racial discrimination -- points of historic sensitivity in the South Africa context. Thus, a slightly more notable minority of respondents felt values were not the same in areas such as the rights of persons belonging to minorities, pluralism, non-discrimination, and tolerance.

FIGURE 108. PERCEPTION OF THE IMPORTANCE OF THE EU, OTHER ORGANISATIONS AND COUNTRIES IN GLOBAL HUMAN RIGHTS. SOUTH AFRICA



Note: based on Q11: In your view, how important, if at all, 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? (n=1158)

Continuity and change behind the perception of EU as a norm-setter

The 2015 perceptions report on South Africa argued that the EU was not generally seen as a normative actor, largely because no media articles reported it as having normative influence in South Africa (instead having influence on third countries). Focus group and elite perceptions also revealed a somewhat cynical view of the EU's normative motivations, perceived as largely acting out of self-interest rather than larger principles. Perception of the history of European engagement with South Africa continues to impact the EU image in South Africa revoking references to colonialism history and supporting view of democracy and human rights standards promotion as hypocritical lecturing.

These sentiments were echoed again in this 2021 study. Elites and the focus group remained guarded about the EU's motivations in the region, even if there was agreement that many of the values that the EU supports are held in common with South Africans. Furthermore, it is not clear that the EU is perceived as normative actor in South Africa, given the paucity of analysis in the press on EU-South Africa relations.

This study has also echoed the 2015 study by showing that the norm-setting influence of the EU has largely been centred around economics and politics, with the near universal perception of the EU as a trade power. In the domain of politics, the difference with 2015 has been the dramatic shift in the geopolitical landscape. A more assertive China and a political divided US has put new focus on the EU as a moderating power.

The other area of contrast with 2015 has of course been the COVID-19 pandemic. Here the EU has had clear norm-setting power. Most of South African media coverage of the EU has been devoted to this subject, following the global repercussions of the EU's reaction to the crisis, especially with respect to the vaccination approval process.

1.12.5. Drivers of continuity and change

Drivers of continuity and change in the South African context can largely be linked back to domestic factors. This can be further divided into time-specific factors, such as the current state of the South African economy or the geopolitical standing of the country in the world, and more macro-chronic issues, such as the stickiness of the colonial legacy, and relatedly, the continued cultural influence of Europe in the country. In contrast, few perceptions of the EU seem directly derived from its international behaviour or events occurring within the organization itself. Thus, despite the Eurozone crisis at the time of the 2015 perceptions study or the perpetual Brexit bickering and COVID19 vaccine bungling at the time of the 2021 study, overall South African perceptions of the EU have remained remarkably stable – and largely positive.

Moreover, as in the case of the 2015 study, less positive images of the EU came from the elite interviews and focus groups, rather than the larger polling data which was overwhelmingly positive. Here the historical tension in North-South relations and the specific colonial and apartheid legacy of South Africa played a role. Respondents did not hesitate to refer to "history" when referring to Europe and, often by extension, the EU. Yet, as with the 2015 study, the results that negative images of Europe linked to history did not undermine the perception of the EU as a crucial economic partner. Most respondents responded favourably to increasing links rather than delinking.

1.12.6. Recommendations for EU public diplomacy

The final section of this report provides public diplomacy recommendations based on the results of our detailed survey of South African media, polling data, focus group and elite interviews. The report has been organized around several themes, including perceptions of the EU in its political relations with South Africa, in the domain of trade, as an international norm-setter, technology and science innovator,

and in other areas. The EU's profile is clearly more prominent across all surveyed levels in some specific areas, politics, and trade. These results largely echo the 2015 baseline study. In fact, a key takeaway from a comparison of the two reports is the high level of similarity of the results. Little has shifted, which is not necessarily a bad thing, especially given the persistently positive perceptions of the EU through the Eurozone crisis (2015 report) and Brexit and the COVID-19 response (current report).

This report also shows the prominence of the COVID-19 pandemic, particularly how it has served as the main focal point for South African press coverage of the EU (and its reaction to the pandemic) and revealed lingering reservedness among elites about the limits of the EU's normative power when faced with explicit challenges to its own interests. COVID-19 also serves as a profound hurdle to surmount for any EU public diplomacy initiative in South Africa.

The recommendations below will account for the COVID-19 challenge, noting the importance of virtual engagement, especially through social media. The recommendations will also make a distinction between short and medium/long term time horizons, as well as accounting for different target audiences (e.g. core vs periphery, elite vs regular citizenry, youth) which of course has implications for public diplomacy strategies. Preceding these recommendations, the following sub-section will elaborate further on some of the specificities around South African society and history that shape perceptions of Europe and how these specificities can influence public diplomacy responses.

There are important discrepancies between the survey data on the one hand and the interview results on the other that have implications for public diplomacy strategies. The polling data reveals a positive image of the EU in a notable number of areas: from being an important economic partner, to a key actor in geopolitics, and a leader on fighting climate change; the message is clearly more EU not less. Yet, these perceptions stand in juxtaposition to the more guarded images of the EU from the interviews and focus group where wariness about the contested history of Western dominance and motivations in South Africa was evident. Further complicating matters is the fact that the interviewed elites and focus group participants likely have more knowledge of the EU and more influence than the cross-section of the country polled in the data set. All, however, is not lost. For all of their stated misgivings, both the 2015 and current study showed that many elites hold connections to Europe through education, family or other interests.

Moreover, while favourable perceptions of the EU provide an advantage for public diplomacy – i.e., the EU is not necessarily playing catching up or trying to reverse strongly negative perceptions – they are often based on vague knowledge of what the organization actually is. This point is demonstrated by the notable lack of news stories specifically about South Africa-EU issues and very few articles written on the EU by South African journalists. Although partly symptomatic of a larger disinterest in the South African press for international news, and thus difficult to reverse simply through any EU public diplomacy initiative -- the challenge could be addressed by continuing to engage elites with influence in the communication sector, ensuring their awareness of EU initiatives of relevance to their audience.

Yet, the EU's standing as a global economic power and major geopolitical actor ensured that even a cursory understanding of it in South Africa did not weaken expectations that it should act in a variety of domains like contributing to global peace, influencing international global trade and fighting climate change. Moreover, perceptions of the EU are strongly positive on these subjects and may thus not require the same level of public diplomacy focus in South Africa. The same cannot be said for some other issues of importance to EU programming in Africa. The focus group results revealed that most did not rate the EU as important to South Africa in domains such as social, health or cultural partnership, despite significant work done in these areas through a variety of mechanisms (including the South Africa-EU Strategic Partnership).

This brings us to the first public diplomacy task:

Increasing awareness of the EU in South Africa through the media (social, traditional)

Policy Aim: addressing a perpetual problem with lack of specific knowledge of the EU as an organization and as a key strategic partner of South Africa.

Short term:

- Identify target audiences (e.g. youth, elites, common citizens) and create specific media engagement strategy for each;
- identify key priority areas for improved visibility of EU programming (as exposed in this perceptions study), such as development assistance.

Medium to long term:

- Based on identified target audiences and key priority areas ramp up public diplomacy work through:
 - EU Delegation social media profile;
 - engagement with media elites to sensitize them to EU programming or issues of immediate relevance to South Africa
- Seek to create events with South Africa partners that both advertise EU initiatives in the region while also being social and conventional media-friendly

Tactics/Tools/Instruments

- COVID-19 has also forced most work to be done virtually, at least for the time being, meaning extra focus on social media. However, the EU Delegation social media site will always have challenges increasing its mass appeal, as do most governmental organizations.
- Therefore, consider engaging South African interns at the Delegation with specific social media skills for assistance in this area. Also target partnerships with entities that do have high profile for the specific group being targeted.

Theme: Development Cooperation

Building on the overall lack of understand of the EU, perhaps the most surprising is the lack of interest or knowledge in some high-profile programming areas, such as EU's development – and this despite hundreds of millions of euros targeted for South Africa through the Development Cooperation Instrument. This may be partly the result of a self-perception that South Africa is distinct from the rest of the continent in that it is not a development partner but trade and finance partner of the EU (this view itself a reflection of a larger narrative in Africa, particularly driven from the African Union, that the continent is in need of trade not aid). Nonetheless, it exposes a key area for public diplomacy work.

Policy aim: Recognize that South African attention to EU programming is very muted and requires more explicit linkage back to topical South African issues to garner visibility (as shown in this study). Account for deep societal contrasts, with programming targeting both elite opinion makers (top down) and most of the population outside elite circles (bottom up).

Short Term:

- Address the issue identified in this study (and the 2015 version) of the EU as being self-interested and elite-oriented. Reflect on more “bottom up” engagement;
- To do this, identify innovative grassroots CSOs doing work complimentary to the EU's programming agenda in the country.

Medium to Long Term

- Use the expertise of local partners to drive programming which at once compliments the EU Delegation programming agenda but also increases the likelihood of local recognition of EU efforts.

Tactics/Tools/Instruments

- Increased internal coordination between programming and public diplomacy arms of the EU Delegation is encouraged to maximise opportunities for identifying gaps in perceptions of the EU and programming driven by the EU that may not be fully exploited for heightening visibility;
- Tie work with CSOs back to the social and conventional media suggestions above;
- This approach with CSOs is of course time-consuming and potentially risky (with respect to CSOs that may not have a long record of reliability and quality). Still, the potential payoffs of addressing the elite-oriented perceptions of the EU in South Africa make the prospect of public diplomacy engagement in this manner worth considering.

Who to involve:

- For development-related work, partners could include innovative social enterprises such as: Partners for Possibility and LifeCo;
- A key partner in the area of sustainable agriculture, touching on crucial issues (in the South African context and beyond) of food production, land reform and environmental security could be the South African Organic Sector Organisation (SAOSO);
- In the area of small business support, where the Europe has a long tradition, engagement could occur with the National Small Business Chamber would be a valuable interlocutor.

Theme: Youth

South Africa's demographic composition remains heavily skewed toward youth (in 2019, South Africa's population was about 58.4 million, of which approximately 21.85 million were 19 years or younger). This is especially so with the country's black majority (the white minority having a significantly older population). Youth then remain a huge opportunity – and challenge – for EU public diplomacy. The vastness of the country, tremendous disparities in education and pervasive racial divisions render a “one size fits all” approach impossible.

Even in the university system, which is arguably the “easiest” way to engage youth on EU issues, the task is not an easy one. There are few EU-related courses in university curricula and few students dedicating their studies to this area. However, novel programs in areas of interest to students and of importance to the EU such as in climate change have already been well received and should be capitalized on further.

Moreover, there remains a cultural attractiveness of Europe (as per the polling data) based largely on sport (football) and entertainment that at the very least attracts South African youth attention. This too is something to harness.

More funding opportunities for students to study in the EU would also be well received. Harnessing the knowledge and public relations potential of Erasmus+ students based in South Africa could also prove mutually beneficial, that is, giving returning students both a platform to discuss their experiences and providing great visibility to the EU and the EU Delegation in South Africa.

Thus, a plan could include:

Short term

- The question of the EU as a friendly actor helping to address South African needs while also welcoming South Africans to Europe cannot be controlled by the EU Delegation in Pretoria alone. However, some variables can indeed be better managed from the Delegation;
- Crucial is the identification of issues of relevance to both youth and EU-South Africa relations (e.g. climate change, migration, culture).

Medium Term

- Ramp up linkages with the vast university network of South Africa outside the Gauteng-Western Cape access;
- Ensure student “buy in” by having them drive agenda. This can be done through linking with specific student associations (such as the European Studies Association of South Africa) or even the larger university student councils.

Tactics/tools/instruments

- Consider linking events to opportunities for funding to study in Europe (something which is always in demand);
- While this might impose extra costs, the public diplomacy gains from projecting an image of an open Europe may be deemed worth the expense. Adding to the possible interest augmented funding for study in Europe (Erasmus+) is the significant network of Europe-educated South Africans that return to their country.

Who to involve:

- South Africa also has a rich diversity of think-tanks and research institutes whose services could also be harnessed for better sensitizing or engaging South Africans on issues of common concern with the EU. Already excellent examples of success exist, such as the EU Delegation’s work with the South African Institute of International Affairs on climate change and youth;
- Outside of the core Pretoria/Johannesburg/Cape Town axis, universities remain reliable potential partners. Think-tanks such as ACCORD in Durban are also of interest;

For some increase in profile to harder to reach demographics, harness the presence of European stars in sport (e.g. football, rugby, tennis) visiting South Africa to promote EU initiatives where possible.

1.13. USA

This Country Chapter presents a synthesis of the US-specific findings discovered during traditional and social media analyses; interviews with multipliers and influencers, focus groups with university students and a public opinion poll – all conducted in the framework of the Update Study 2021. The structure of the chapter follows the logic of the research design. We present the main findings for the US according to the research indicators guiding the 2021 Study: visibility; actorness; local resonance; and norm-setting. We also discuss findings according to the themes analysed in this study: economy and trade; political issues; development; social issues; environment; energy; science, research, and technology; culture; education and health. The penultimate section looks at the drivers behind

perceptions of the EU and Europe in the US. We conclude the chapter with recommendations for the EU's public diplomacy in the US.

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.

1.13.1. Sample

Public opinion

The online survey was coordinated and conducted by PPMI through an online panel provided by *Syno International*. The respondents in the US were surveyed in English. The data collection took place from 28 April to 16 May 2021. The sampling for the survey was designed to be nationally representative of age, gender and regions. Respondent profiles in the US were established based on data from the United States Census Bureau⁴¹. The survey included a total of 1,100 individuals between 15 and 64 years old⁴².

Media

The quantitative part of the media analysis with the purpose to identify the general trends in a large press sample was carried out by PPMI. The data was collected for five popular daily newspaper in the US: *The New York Times*; *Washington Post*; *US today*; *New York Post*; *Los Angeles Times* and one business newspaper *The Wall Street Journal* – for the period 1 February - 30 April 2021. The *Factiva* repository was used to aggregate content from both licensed and free sources, and in-house data processing was applied to produce the results.

Two separate datasets in English were collected over the period of observation: the "EU" dataset (916 articles) and the "Europe" dataset (2,525 articles). Search terms for the dataset "EU" are: "European Union", "EU", "European Commission", "European Parliament", "Court of Justice of the European Union", "EU presidency", "EU Council", "European Council", "Council of the European Union", "Eurozone", "European Central Bank", "European Investment Bank", "European Medicines Agency". The search terms for the dataset "Europe" are "Europe", "European" and "Europeans". The search terms for "EU" and "Europe" datasets consider both plural and singular forms as well as possible grammatical forms of the search terms in the local language. Europe dataset excludes articles containing any of the "EU" dataset keywords.

The qualitative media content analysis of news that reported the EU as a major focus/theme (100 articles) was designed, supervised and coordinated by the experts from the Public Diplomacy and Political

⁴¹ The United States Census Bureau: <https://www.census.gov/>

⁴² Detailed public opinion survey data are available in Annex II of this Report – Comparative public opinion survey report.

Communication Forum (PD-PCF), University of Canterbury (UC), New Zealand, and conducted by Country Experts trained by the PD-PCF UC. PPMI collected the media sample for the in-depth qualitative content analysis using the search engine from two prestigious newspapers *The New York Times*; *Washington Post* and one business newspaper *The Wall Street Journal*. The timeframe of observation remained the same as for the quantitative and social media analyses. Country Experts analysed the EU image created by applying elements of content, cognitive and critical discourse analyses.

Social media

PPMI carried out the social media analysis. The data collection process was automated using the online social media monitoring tool *Mediatoolkit*. Social media posts were collected from Twitter, Facebook and Instagram with the use of automated queries. Coverage of the EU was traced using a set of the EU-related keywords: “European Union”, “EU”, “European Commission”, “European Parliament”, “Court of Justice of the European Union”, “CJEU”, “EU presidency”, “EU Council”, “Council of the European Union”, “European Council”, “Eurozone”, “European Central Bank”, “European Investment Bank”, “European Medicines Agency”. All the keywords were additionally traced in one-word format to capture related hashtags: europeanunion, europeancomission, europeanparliament, courtofjusticeoftheeuropeanunion, eupresidency, eucouncil, europeancouncil, counciloftheeuropeanunion, europeancentralbank, europeaninvestmentbank, europeanmedicinesagency. Europe-specific keywords used for filtering relevant social media posts are “Europe” and “European”. Europe dataset excludes posts containing any of the “EU” dataset keywords. Additionally, the mentions were filtered through a location filter to ensure that the collected mentions originate from the US. Language filter was set up to collect posts in English.

The resulting sample of the US social media posts between 1 February and 30 April 2021 includes 2,564,407 mentions, of which 1,426,044 are of the EU and 1,138,363 are of Europe.

Working with social media platforms, the Project Team followed each platform’s terms of use. All identifiable information of individuals from social media data remains confidential and is removed before publication of findings. Computational analyses of the large number samples involve only contents from media databases’ public websites and non-private social media accounts – that is, posts that are available to public audiences. No generalised conclusions that might cause any potential harm will be drawn from social media analyses on identifiable communities.

Interviews and focus groups

Interviews with local opinion- and decision-makers as well as focus groups with students were conducted by the Country Experts, with training support and supervision from PD-PCF, UC, following the approval of the UC Human Ethics Committee. As part of this study, interviews and focus groups aim to provide in-depth explanations about the US perceptions of Europe and the EU and cross-reference the findings from the public opinion survey, traditional and social media analyses.

One focus group with students was run on March 31, 2021. It consisted of 12 students (7 female, 5 male) aged 18-29, from diverse academic backgrounds and institutional affiliations: international affairs, security studies, European studies, sociology, political science, journalism, media and communications and environmental sciences. Participants were from undergraduate and graduate programmes. Eleven out of twelve participants have travelled to Europe; their experiences ranged from tourism to working in Europe for several years. Four participants have studied in Europe, seven have close friends in Europe and four have family living in the continent. Students in the focus group were more aware and knowledgeable about the EU than US students on average.

13 interviews with experts were conducted between June 1 and June 18, 2021, via online video conference. The experts (10 men and 3 women) were from academia (8), think tanks (3), government (1) and business (1). Their expertise was in finance/economics/trade (5) international relations/European studies (3), political science (3) and history (2). Experts were also from different US regions: Northeast (6), South (3), Midwest (2), Mountain (1) and West Coast (1). These experts were more aware and knowledgeable about the EU than their counterparts in their respective sectors, some of them were also involved in EU programmes and/or cooperation with EU institutions. Semi-structured, anonymous qualitative group interviews under Chatham House Rules were conducted with all EU Delegations across the 13 key partner countries. Interviews lasted between 60 to 90 minutes. The group interview with representatives of the EU Delegation to the US was conducted on 16 April 2021 by the members of the Core Team (PD-PCF UC and PPMI) and the Country Expert.

1.13.2. Visibility

According to the *public opinion* survey, the EU's visibility has not significantly changed since 2015 among the US general public. Only 10.1% of survey respondents do not know or cannot indicate how positive or negative they feel about the EU. This implies that almost 90% of the US citizens could express a positive or negative opinion of the EU. However, the UN (8.5% of "do not know/cannot answer" replies) as well as Japan (7.2%), China (7.2%), Russia (8.4%) and India (9.8%) remain more visible than the EU, while other than the UN international organisations in the list are less visible. The only change refers to that the public is now more aware of the EU than of Brazil (11.5% "do not know/cannot answer" replies in 2015 vs. 10.5% in 2021).

The public also prioritises positive descriptors when describing the EU. The EU is ranked the highest after the US itself for being *multicultural* (23.2%; 30.8% in 2015) and third (after the US and Japan) in being *modern* (29.8%; 24.4% in 2015), *peaceful* (27.1% vs. 20.1% in 2015) and *united* (22.0%). In relation to negative terms, only 5.8% of Americans describe the EU as *aggressive* – amongst the lowest share in relation to major countries. Furthermore, only 8.2% of American describe the EU as *hypocritical* and 9.3% as *arrogant*. However, there is a slight growth in negative descriptors the over time – in 2015, 4.6% of respondents found the EU *aggressive*, 8.5% *arrogant* and 7.6% *hypocritical*.

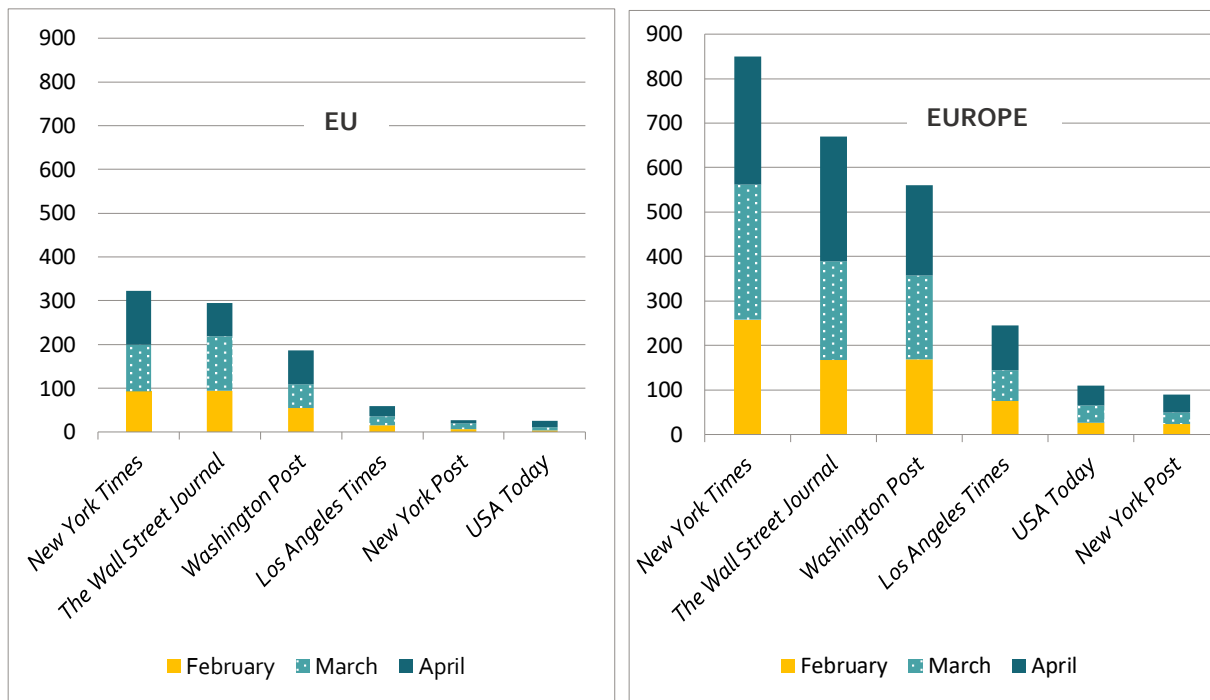
The US public also perceives the EU's performance rather positively across most sectors, particularly tourism (63.3% see it as "very good" or "fairly good"), global trade (61% respectively) and high-quality food (54.5%). These areas were also the most positively perceived by the public in 2015 although with slightly fewer positive evaluations than in 2021: 59.2% of "very good" and "fairly good" evaluations for tourism in 2015, 50.9% for global trade and 47.3% for high-quality food. Overall, in 2021, around 15-20% of respondents either cannot or do not want to evaluate the EU's performance across various sectors – an improvement when compared to 22.6-27.2% in 2015, yet still an issue to take into consideration. Such indicators point to a persistent limited awareness of the EU among the general public – the problem frequently stressed by the interviewed experts as well.

More than half of American respondents (54.9%) read or hear about the EU about once a month or more; 22.1% – weekly and 15% daily. On the other hand, over 44.1% hear about it rarely or never, or do not know/cannot answer this question. This confirms limited exposure to the EU and EU news among Americans. EU experts often highlight how little Americans, especially outside coastal cities, are aware of the EU. According to one expert, 'It's always surprising to me how much the EU is unaware of how irrelevant the EU is in the American imagination, and by American imagination again I mean the general public'.

In the US, the traditional *media* (press) coverage of Europe is significantly higher than that of the EU: 73% of the observed media sample focuses on Europe, with the remaining 27% cover the EU and its institutions. The "EU" dataset had similar *media* visibility in March (35.5%) and April (35.5%), while the

coverage for “Europe” is slightly lower in February (28.5%) than in March (33.6%) or April (37.9%). Qualitative media analysis reveals that heightened visibility during these periods was driven by updates on post-Brexit negotiations and vaccination policy as well as riots in Northern Ireland and the news of Mario Draghi’s becoming a prime minister in Italy.

FIGURE 109. VOLUME OF NEWS ITEMS WITH A REFERENCE TO THE EU AND EUROPE IN TRADITIONAL MEDIA. USA



Note: based on automated quantitative data analysis. Includes press articles which report on the EU and Europe as a principal or secondary subject of the article.

Overall, the EU and its institutions are not profiled as the main actors in the majority of news stories that focus on the EU. Two pieces of news provoked more intense coverage of the EU during this period. The first was the meeting of the European Council on March 25 and 26, and the second one began on April 1 – the first day of stage 2 of Brexit, the end of the EU-UK “grace period” and reintroduction of imports/exports controls between the two.

In contrast to traditional media, the EU’s visibility in *social media* is slightly higher than that of Europe. The peaks in the coverage differ in time as the events that prompted the peaks. A peak in Europe-related posts on 19 April is linked to the discussion around the creation of the European Super League. A peak in EU-related posts on 26 April refers to several topics. The news on the EU’s legal action against AstraZeneca for breach of vaccine supply as well as the EU’s plan to allow entry for vaccinated tourists from the US were widely discussed. Another highly visible topic was the conflict in Tigray region in Ethiopia and, in particular, the problem of civilian killings and sexual violence in which the European Commission and the EU Council were mentioned along with the UN and US policymakers (Chris Coons and Antony Blinken).

Visibility of EU institutions and EU leaders. Visibility of Member States and their leaders

In both the “EU” and “Europe” traditional media (press) datasets, among the EU institutions, the European Commission is mentioned the most – 120 times during the period of observation. The leading press pay slightly less attention to the European Medicines Agency (94), European Central Bank (57),

European Parliament (56) and European Council (33). Likewise, but to a lesser degree, the European Commission also receives the most mentions in the qualitative media sample that explores articles in which the EU is reported as major focus (39 mentions). The Commission is followed by the European Central Bank (21) and European Medicines Agency (15) – the latter playing an important role in the vaccine rollout.

While it is not surprising to see the European Commission mentioned frequently due to its central role in life of the European community, the European Medicines Agency would normally not have such high visibility. Its important role during the global pandemic is a leading reason for its prominence during this period. Inversely, the European Council only met once between 1 February and 30 April 2021, reducing its potential for being mentioned in the US media. If the period chosen for the sample had been slightly longer, it could have encompassed that two other European Council meetings, shortly before (January 21st) and after (May 8th), could presumably increase the incidence of European Council mentions.

The most visible EU officials in the qualitative media sample that features articles with the EU in the major focus are President of the European Commission Ursula von der Leyen (21 mentions) in the context of her diplomatic visit to Turkey and the export rules for vaccinations, and a distant second President of the European Central Bank Christine Lagarde (6) in the context of economic growth in the eurozone and the role of the ECB in economic stimulus. Similar to the media in 2015, the US media in 2021 focus on crises in their EU reportage, which prompts visibility of the respective actors. For example, in 2015, the most visible EU actors in media coverage were the European Commission and the European Central Bank and their leaders Jean Claude Juncker and Mario Draghi respectively – in dealing with the migration and economic crises.

Interestingly, the key EU officials have very little visibility vis-à-vis the heads of EU Member States, according to the interviewed experts. This is because they EU leaders are seen to be less influential in resolving specific problems in the US' bilateral relations with Europe and come across more as bureaucrats.

The most frequently referenced Member States in traditional media (press) are France (405 mentions in the "Europe" frame, 299 mentions in the "EU" frame), Germany (304 and 304 respectively), Italy (207 and 169), Spain (170 and 87), the Netherlands (81 and 43) and Ireland (81 and 43). In the qualitative media sample, the most visible EU Member States are Germany (52 mentions), France (46) and Italy (28), followed by Spain (14) and Belgium (14); twenty-three of the 27 EU members are mentioned at least once. The driving events for most of the mentions were related to the pandemic and in some cases domestic politics such as in Spain (Catalonia) and Italy (instability in government). The findings are somewhat like in the 2015 Study, where Greece and Germany were the most widely reported EU Member States in the context of the Greek crisis, followed by France (terrorism and anti-globalisation) and the UK (Brexit).

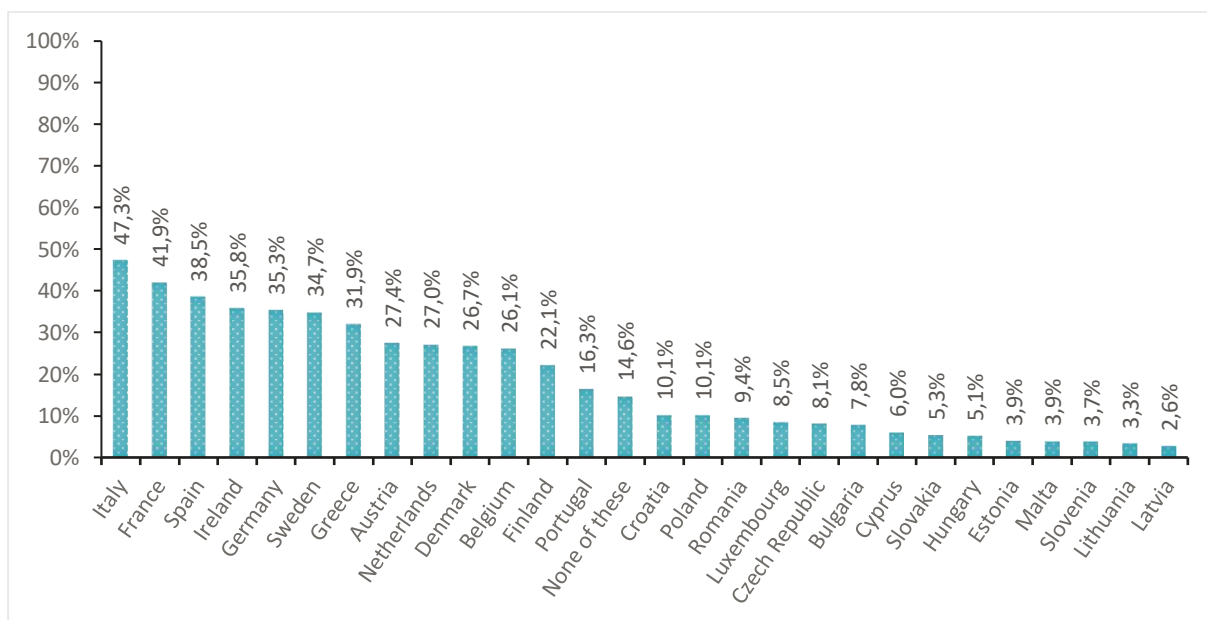
In the 2021 qualitative sample, almost no articles focus solely on Germany or France, but both EU Member States are frequently cited whenever an EU-wide policy is mentioned – either to detail the effects or results of that policy in each country, or to give the position of the two influent member states on that policy. The heightened profile of Italy appears to be more circumstantial due to the appointment of Mario Draghi for the post of prime minister in Italy. This is also reflected in the expert interviews, where the UK appears as an actor of growing importance for the US in Europe (post-Brexit) and also in references to German initiatives and projects in the US.

The situation on *social media* mirrors that one in traditional media with the exception of the visibility of the ECB). The European Commission is the most visible EU institution in US social media with 26,054 mentions. A considerable share of attention is also paid to the European Parliament (18,437 mentions)

and the European Medicines Agency (14,208), followed by the European Central Bank (4,320), the European Council (3,917) and the European Investment Bank (2,499). In US social media posts, most frequently references Member States are Germany, France, Italy, Ireland and Spain. Angela Merkel is by far the most mentioned EU Member State leader with 4,407 mentions, followed by Emmanuel Macron a distant second at 1,826 mentions and Victor Orbán at 1,121. The prominent role and wider awareness regarding the German and French leaders place them as leading European figures with strong visibility in the US – also in line with interviews and focus group findings. Victor Orbán, on the other hand, is known in the US due to his controversial governing style and fears in the US about creeping authoritarianism in some parts of Europe.

In terms of the attractiveness of EU Member States to the American general public, Italy is considered the most attractive, followed by France and Spain. The least attractive are Latvia, Lithuania and Slovenia (Figure 110). Focus group participants identify the most attractive countries as those that were their destination of past travels and tourism, or locations in which participants have family or share other personal connections.

FIGURE 110. ATTRACTIVENESS OF THE INDIVIDUAL EU MEMBER STATES. USA



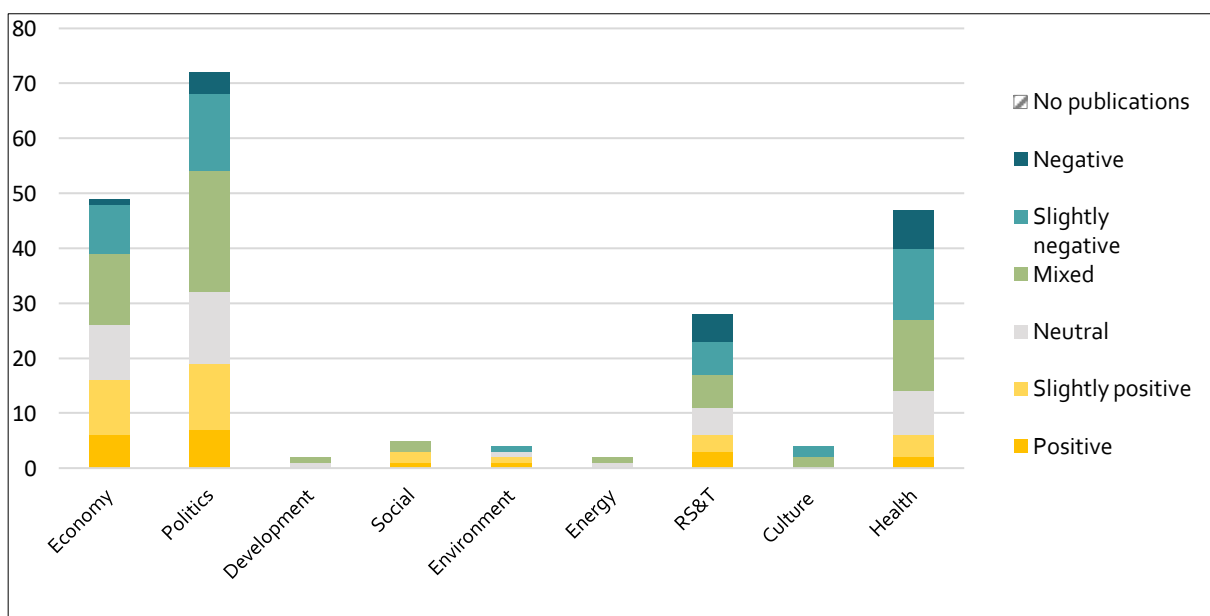
Note: based on Q25: Please indicate which European countries look the most attractive to you? Respondents could choose more than one country (n=1100). Respondents were not limited in the number of countries they could name.

Perception-wise, focus group students, for example, most commonly reference the flag of the EU and map of Europe as their instant associations with the EU. These, along with the Euro currency and EU buildings, are also mentioned as important images in expert interviews. Experts additionally reference the EU’s international roles, such as (champion of) democracy, peace, diversity, and stability. They point, however, to the lack of knowledge of EU actions vis-à-vis abstract associations (EU values) among the public. Meanwhile, the focus group participants share largely positive views of the EU and reveal high expectations of it, because they see it as an international leader in climate and environmental regulation and social democracy. Students’ negative comments are largely about missed opportunities or untapped potential rather than of anti-European sentiment.

Emotive charge

The quantitative media analysis establishes that the overall evaluation of the EU in the US traditional (press) media is mostly neutral with a slight incline to positive (Figure 111). In 2015, the evaluation of EU news published by the three newspapers was rather balanced: “negative” and “more negative” news represented less than 40%, while “positive” and “more positive” totalled between 30% and 40%. In 2021, a strongly negative sentiment is visible only in a few articles published in *The New York Post* and *The Los Angeles Times*, but the overall share of negative and slightly negative news per newspaper together does not exceed 20%. Yet, in the qualitative traditional media sample – in the articles that report the EU as the main focus – emotive charge appears to be more negative. In this news, emotive descriptors outline difficulties and frustrations related to the EU’s handling of the COVID-19 pandemic inside the EU, health and safety restrictions, the slow vaccine rollout in the EU and the economic impact of the pandemic on the EU within its borders and its performance globally. However, there are also more upbeat news stories about vaccine efficacy and stories with a neutral-to-positive coverage on other issues such as deepening EU integration post Brexit and the potential for trade deals.

FIGURE 111. EMOTIVE CHARGE IN PRESS ARTICLES REPORTING ON THE EU AS A PRINCIPAL SUBJECT. USA



Note: Based on qualitative media analysis conducted by country experts. One article can reflect more than one theme.

On *social media*, a considerable share of EU-related posts is negative (45.5%), followed by a positive (32.3%) and neutral emotive charge (22.2%). Europe, in contrast, is often mentioned in posts with positive sentiment (46.2%), the rest of mentions remain split between negatively charged (29.3%) and neutral (24.5%). The more negative tone towards the EU is likely due to its association with the performance in dealing with the pandemic and related policies. Interviewed experts mention on a number of occasions that Europe is perceived positively due to a number of attractive activities such as tourism/travel and attributes such as culture (music, sports, cuisine etc.), while the EU is associated with governance, which many Americans already see in a negative light. Furthermore, Brexit negotiations and a difficult vaccine rollout are also seen as domains of governance. In contrast, youth from focus groups see the EU as an international leader and have high expectations of it. As a result, they comment negatively about the EU’s missed opportunities or untapped potential.

Continuity and change behind visibility and emotive charge

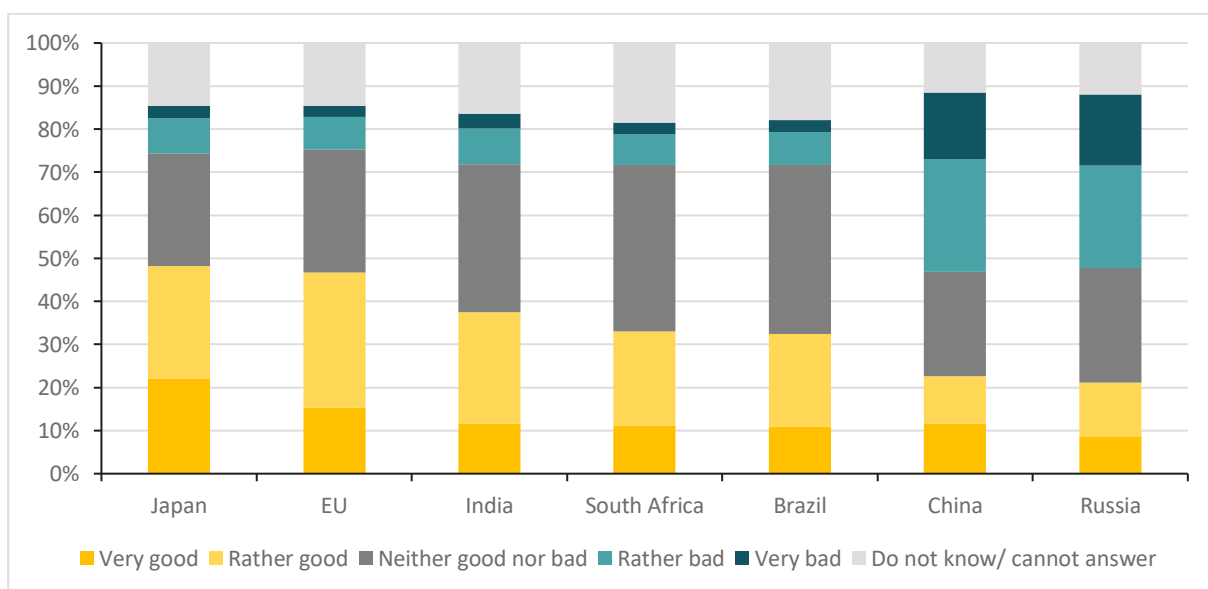
The visibility of the EU is driven by EU-specific events associated to crises. In 2015, much of the visibility was with the Greek financial crisis and the migration crisis. In 2021, the global pandemic dominates the coverage of EU events. Accordingly, the most visible EU actors in 2021 are the European Commission, followed by the European Medical Agency – contrasting the ECB in 2015. The EU’s visibility has slightly improved with the US general public, but the share of respondents who remain unaware of the EU remains high. Public evaluation of the EU’s performance across various policy areas has also slightly improved. Overall evaluation of the EU in the US traditional media is mostly neutral with a slight incline to positive, while negative evaluations are present in the sample that focuses on the EU as a major news topic – in line with the trend that such news sells better. Meanwhile, interviews and focus groups reveal mixed perceptions that vary from enduring and long-term positive images of European culture, development, and education, to critical and negative perceptions related to crises such as EU’s activities in addressing the pandemic.

1.13.3. Actorness and local resonance

The EU as a partner

The American general public considers the EU largely an important partner for the US (61.1% of respondents “agree” or “strongly agree” with this statement vs. 62.4% in 2015). A number of respondents view the EU as a trustworthy partner (53.4% vs. 52.4% in 2015) or the one that has strong political ties with the US (52.2% vs. 52.1% in 2015) as well as an important partner for educational exchanges (51% vs. 51.5% in 2015). These findings over time demonstrate a rather stable pattern in the perceptions of the EU as a bilateral partner to the US, yet with a slight decline. Only about 10% of American respondents disagree with the aforementioned roles of the EU. In terms of the strength of the perceived relationship, the EU is second only to Japan and ranks higher than other US allies such as Brazil and India, and substantially ahead of potential adversaries such as Russia and China (Figure 112).

FIGURE 112. EVALUATION OF THE US RELATIONSHIP WITH THE EU AND OTHER COUNTRIES. USA



Note: based on Q3: Which of the following words best describes your country’s overall relationship with each of the following countries and organisations? (n=1100)

Expert interviewees see the EU as an international leader in economy/trade, as well as a standard-setter for digital norms and financial regulations. Focus group members share this view of the EU as a normative leader, and also focus on the EU's leadership in the fields of development and sustainability, but they express some concern that the EU is not achieving its full potential. One focus group member sees the EU as 'having the capacity to be an international leader' but not 'affecting the overall international system [...] as much as other states', in particular Germany or France. The same is true for interviewees, several of whom claim that the EU 'punches below its weight class'.

Importance of the EU in selected fields

The majority of news articles in the US quantitative *media* sample do not specify their sources of information. The most cited international sources for the "EU" news are *Associated Press* (42%) and *Reuters* (23%). Other, less visible news agencies are *Bloomberg* (6%), *BBC* (6%), *The Independent* (5%), *The Conversation* (4%), *CNN* (4%), and *Politico* (4%). The remaining international sources received less or no attention at all. The qualitative sample further reveals that the majority of news about the EU in the US is produced by US correspondents in the major cities in the EU (Brussels, Berlin and Rome). Monika Pronczuk and Matina Stevis-Gridneff at the *New York Times* and Laurence Norman at the *Wall Street Journal* are tied for most prolific authors, each writing 10 articles featuring the EU in the 100-article sample. Television is the leading source of information about the EU for 42.6% of survey respondents, just slightly ahead of online media at 42.1% followed by social media (24.4%) entertainment streaming platforms (22.7%) and only then press (18.4%). However, media analysis covers thematic areas in which the EU is more visible, as traditional, and social media both reveal the thematic foci on politics, economy and health.

The quantitative analysis of the US traditional (press) *media* shows that the EU is most often mentioned in the context of politics (26%), economy (22%) and health (22%). In the "Europe" sample, the economy (21%), culture (19%), politics (18%) and health (18%) are dominant. Compared to the "EU" sample, the "Europe" dataset has a significantly higher coverage of culture (19% vs. 5% of the "EU" sample). For both Europe and the EU, development is the least noticeable thematic frame with the share of only 1% in the sample. Environment, energy, and RST are among the least noticed thematic frames too with 3 to 4% share in the total coverage. The dominance of health in the US media coverage is a trend provoked by the COVID-19 pandemic. Apart from that, politics and the economy remain the most visible frames in 2021 as they were in 2015, when the economy constituted the most visible frame in the business paper (the *Wall Street Journal*) and politics in the *New York Times* and the *Washington Post*.

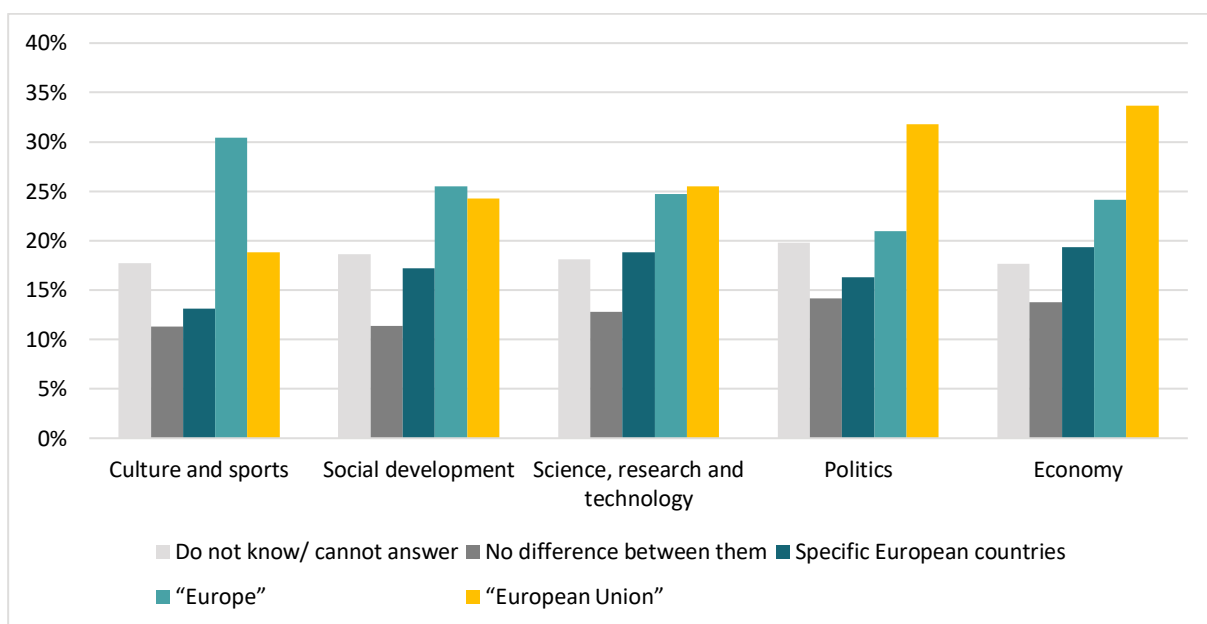
The situation in *social media* is rather similar. Here, the EU is most often mentioned regarding political issues (40%), economy (23.5%) and health (21.3%). Europe is visible within these thematic frames as well; however, in contrast to the "EU" sample, social issues and culture are much more prominent in Europe-related feed.

The findings from the media analyses match those of the survey, which indicates that, when the EU and Europe are compared, the US public associates the EU with the fields of economy (33.7%), politics (31.8%), and RST (25.5%) more than Europe (24.2%, 21.0% and 24.7% respectively). The US public associates the areas of social development and culture and sports more with Europe than the EU (25.5% and 30.5% respectively vs. 24.3% and 18.8%). Interestingly, ten out of twelve focus group participants consider the EU a leader in at least one area, with sustainability, development, and the EU's role of a normative leader (in particular on social democratic values and environmental regulation) as the most frequently cited areas. Meanwhile, interviewees tend to acknowledge the EU's leading role in the economy, but not across all sectors: 'In the area of security and defence, the EU still is facing some coordination problems. In environment and development, it is a global leader, while in human rights it is a rhetorical leader. Economically, it is one of the three leaders in the world'.

Economy and trade

In the US, the economy is usually a leading theme associated with the EU, especially during times of economic crisis. In 2021, while the economy remains a leading theme, politics and healthcare are considered as important if not more important in *traditional media*. On *social media*, the economy is viewed both positively and negatively at relatively equal degrees (approx. 40% each). This is well below culture (at approx. 60% positive), the environment and research, science and technology (approx. 50% each). When compared to 2015, the EU’s media framing in 2021 is more positive. The EU’s economy is seen as being hit by the pandemic but, unlike in the 2015, the EU is framed as having a role to play in international economic recovery post COVID – with the support of the US. In contrast, in 2015, metaphorical images of disease and sickness were predominant in the coverage of the Greek crisis, with ‘unhealthy’ Eurozone: the EU compared to a sick person and Greece described as being sick, unwell, or even dying. There was a sense that a failed EU could spread to the US and have disastrous consequences for a weak American economy – a completely different outlook from the cooperative/opportunistic one in 2021.

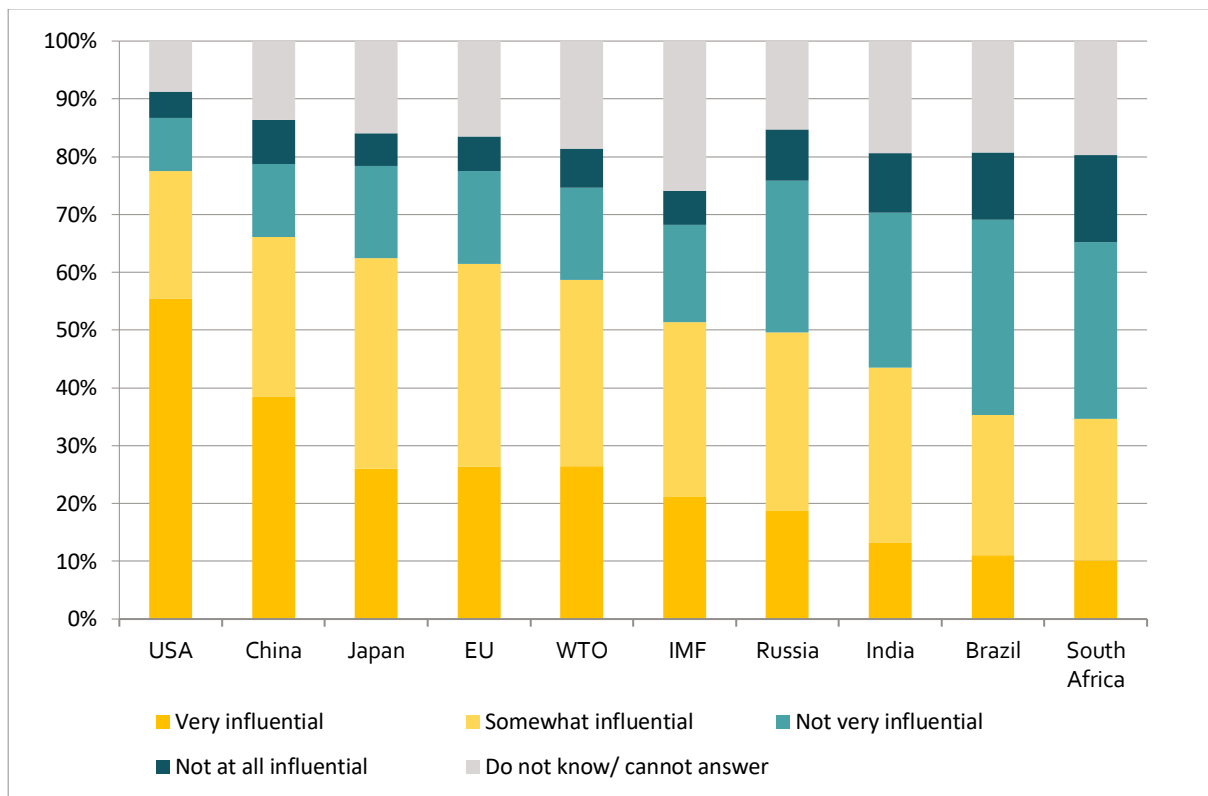
FIGURE 113. ASSOCIATION OF DIFFERENT AREAS TO THE EU VERSUS EUROPE. USA



Note: based on the answers to Q22: Some people think about Europe, whereas others think about the European Union when talking about economy, politics, culture, sports and other areas. In your case, which term – Europe or the European Union - comes to your mind first when you think about the following subjects? (n=1100)

*Please note that in 2015, this question was accompanied by a chart in a different format under the section “Research, science and technology”. The wording and answer categories used in this question have changed in 2021, making it inappropriate to conduct historical comparisons.

The general public in the US perceives the EU as being moderately influential in global economic affairs: 61.5% of survey respondents describe it as either “very influential” or “somewhat influential” (vs. 62.8% in 2015). It is lower than the assessment of the influence of their own country (77.5%), as well as other countries such as Japan (62.4%) and China (66.1%). In 2015, when the public was asked about the influence in economic affairs, respondents saw the US as the most influential actor, followed by China and the EU.

FIGURE 114. EU INFLUENCE IN GLOBAL ECONOMIC AFFAIRS COMPARED WITH COUNTRIES AND INTERNATIONAL ORGANISATIONS. USA

Note: based on the answers to the survey Q6: In your view, how influential, if at all, in global economic affairs are the following countries and organisations? (n=1100)

In relation to the US more specifically, the American public overwhelmingly views the EU as an important trading partner (62.9% of survey respondents vs. 60.5% in 2015). Likewise, the EU is perceived as an important investor in the US by 54.5% of Americans (vs. 51.2% in 2015). On both of these issues, there is a slightly improved perception. Moreover, only under 10% of American disagree with the above statements. American respondents are also largely supportive of statements that portray the EU as having strong economic ties with the US (53.7% vs. 49.2% in 2015), an important partner for science and technology (55.7% vs. 53.8% in 2015) and an important source for agricultural and food products (47.3% vs. 39.5% in 2015). On the other hand, 42.1% of Americans agree that the less cooperative statement that the EU is protecting its markets and the expense of others (vs. 37.3% in 2015). Well over 80% of respondents express views on all issues related to EU partnership. Interviewed experts also see the EU as predominantly a trade and economic partner of the US. They further pinpoint two elements that make the EU a leader in economic affairs: its role in setting international financial regulations and its trailblazing in digital economy. These themes heavily correspond with issues such as corporate tax, antitrust law, consumer protection, privacy, and artificial intelligence. One interviewee also hints to a potential for regional partnership, e.g. ‘in the area of trade, Canada and Mexico are very significant trade partners [of the US]. The EU has worked with Mexico and Canada to enhance trade and produce clear regulations’.

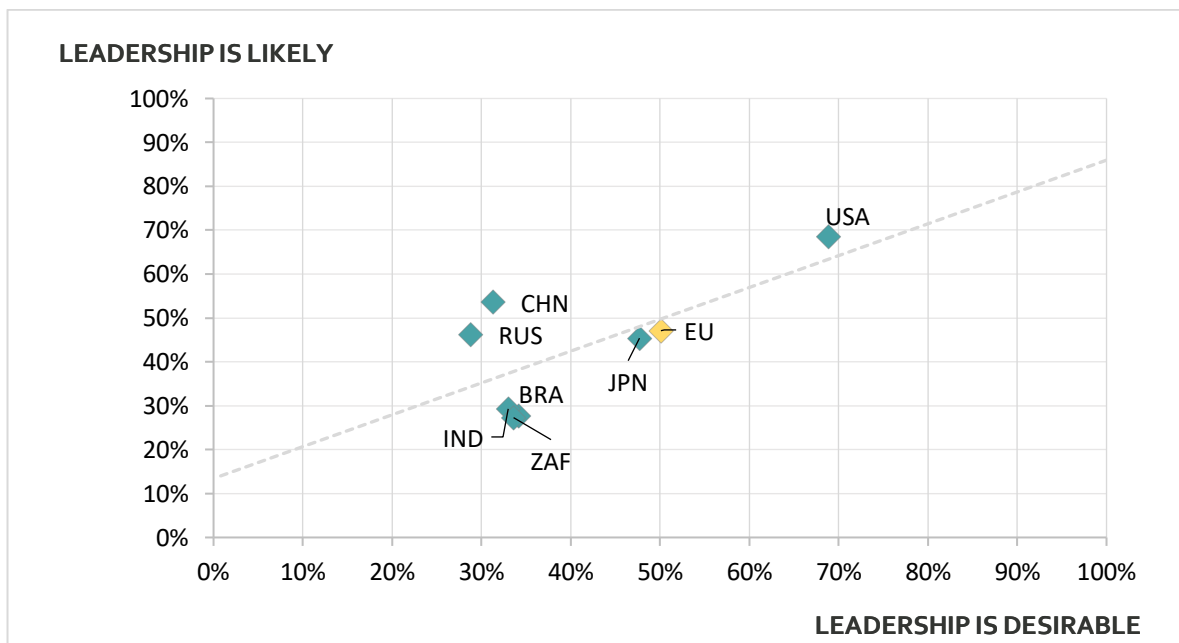
Politics

Similar to the economy, politics has remained one of the dominant frames in the US media both in 2015 and 2021 – with a particular focus on the EU’s external relations. In 2021, policies, institutions and actors

related to the pandemic and vaccine rollout receive significant media coverage. Additionally, external relations – the UK post Brexit and the US post Trump (and relations with the new Biden administration) – are also notable issues. In a similar vein in 2015, the media reported upon transatlantic relations, European security (Ukraine, Russia, NATO) and migration crisis in the Mediterranean.

About half (50.1%) of Americans believe that it is very or somewhat desirable for the EU to take a strong leadership role in the world (vs. 52.7%), although slightly less than half (47.1%) believe this is likely to occur (vs. 50.2% in 2015). Outside higher ratings for the US itself (68.9%), only Japan has a comparable desirability for stronger leadership amongst American respondents (47.7%), with other countries and regions less favoured (Figure 115). For a comparison, in 2015 the EU was second to the US only. Also, the majority of Americans recognise the likelihood of China to become an international leader (53.6%) which is similar to 2015 when the EU also ranked behind the US and, to a lesser extent, China in terms of its perceived likelihood for a strong leadership role in the future.

FIGURE 115. DESIRABILITY VS. LIKELIHOOD OF EU GLOBAL LEADERSHIP COMPARED TO OTHER ACTORS. USA



Note: based on Q4: How desirable is that each of the following countries and organisations take a strong leadership role in world affairs? And Q5: how likely or unlikely is it that each of the following countries and organisations will take a strong leadership role in world affairs five years from now? (n=1100) The horizontal axis presents the sum of “Very desirable” and “Somewhat desirable” responses to the Q4. The vertical access presents the sum of “Very likely” and “Rather likely” response to Q5.

The vast majority of American survey respondents (63.7%) perceive the EU as important for maintaining global peace and stability (vs. 66.9% in 2015). In this issue-area, the EU is ranked third after the US (79.9%) and NATO (64.1%), but slightly ahead of the UN (63.1%). Only 15.2% of respondents do not know or cannot answer on the role of the EU on this matter. The indicators are lower than those in 2015 when the EU was behind only the US in terms of public opinion on performance in global peace and stability. Also, the EU’s performance was seen as similar to, albeit slightly more important than that of the UN and NATO. Meanwhile evaluation of EU actions in this have slightly improved: In 2021, 45.4% evaluate EU actions in fighting against terrorism and radicalism positively (vs 40.2% in 2015) and 40.5% on the issue of military operation (versus 38.9% in 2015).

On supporting regional and international cooperation, 50.6% of American respondents think that the EU performs very or fairly good, while only 8.7% think it acts fairly or very bad. The EU is also judged to be very or fairly good at foreign policy (49.6%), justice and rule of law (49.2%), media freedom (47.3%) and peacekeeping operations (45.6%). The issue with the worst perceived performance is dealing with refugees/displaced (39.8%).

According to the experts, the EU's leadership scope is seen as limited, because the EU 'is too disjointed to be a leader in more areas due to problems with power relations between Member States and the EU'. The EU is perceived to be modest as a military or political power while being a balancing force in international diplomacy. Likewise, most of the interviewed students see the EU as a more distant political organisation that does not directly impact their lives. Challenges faced by the EU in the US, including political dialogue, are seen to be linked to the US' changing political landscape during and since the Trump Administration, which shifted conservative voters away from policy preferences associated with the EU.

Climate and environment

On climate and environment, the EU is recognised as a leader. When asked how important different countries and organisations are in fighting climate change and protecting the environment, 64.7% of Americans rank the EU as very important and somewhat important. The EU is second only to the US (74.8%) but ahead of the UN (62.4%). On the same question, 20.3% of respondents think the EU is not important, while 15.1% do not know or cannot answer. American respondents also see the EU positively and somewhat positively in combatting climate change and protecting the environment (58.3%). They rank the EU behind the US (68.7%) but ahead of other countries and organisations. Overall, only 22.4% of respondents evaluate the EU's actions in the field of environment and climate change as "somewhat negative" or "very negative", while 19.2% do not know or cannot evaluate its actions. Regarding the performance of the EU in fighting against climate change/environmental protection, the survey shows that 50.7% of the public assess EU actions as "very good" and "fairly good", while only 10.7% consider it as "fairly bad" or "very bad". While the stories about the environment do not appear often or as major stories in the EU news under analysis, experts and focus group participants repeatedly mention the EU's leading role on the environment. Ten out of thirteen expert interviewees mention the US as a leader in sustainability. One expert claimed that the 'EU is a norm-setter [...] on environmental policy'. Focus group members go further, expressing that 'the EU is viewed as a leader in environmental policy and the US should look to them on how to implement them domestically'. This is a huge improvement when compared to 2015, when the US public did not see protection of the environment and the fight against climate change as a field, in which the EU stood out to them: only 38.5% thought the EU performed "very well" or "fairly well" in this area and 43.7% shared this attitude for green technologies. However, the US media in 2015 was already framing the EU as a normative actor in the field, which may explain the change in public perceptions.

Energy

Energy has a limited visibility in the *qualitative media* sample – often framed as a secondary issue when mentioned. According to students in the *focus group*, energy ranks somewhere in the middle in terms of its perceived impact on the US. *Experts* also do not see energy as a significant topic when it comes to its influence on the US policy. One expert sees the EU as a 'role model for energy production but [...] its [EU] infrastructure is lagging behind Asian actors'. There has also been an expert discussion about energy policy among certain Member States, and its geopolitical overlap in relation to Russia, which is seen to be using energy supplies to Germany to leverage political influence. In 2015, the media framing of EU actions in energy was comparatively low in visibility with articles focusing on climate change and

on oil prices. As such, energy does not appear to be an important topic in the US perceptions of the EU both in 2015 and 2021.

Research, Science and Technology

The topic of research, science, and technology (RST) does get some coverage as a primary topic in the qualitative media report (3 of 100). Focus group participants also rank it the top issue-area in EU-US cooperation. Finally, a number of experts highlight the importance of this sector for the US policy. They see the EU playing a leading role in setting standards that other nations including the US sometime follow, particularly visible in digital technologies (data protection and artificial intelligence). The EU's General Data Protection Regulation (GDPR) was one area in which the EU had played a leading role in recent years. One interviewee also ranks research and technology as one of the priority areas in the Transatlantic relationship, linking RST to the incentives to the private sector in the US. However, in relation to other countries and organisations, the EU does not stand out as prominently in this sector as on other themes when it comes to US public opinion. While the US is considered the most important country for advancing innovation and technological progress (79.3%), both Japan (72.1%) and China (67.9%) are also viewed as more important than the EU (64.5%). Meanwhile, 20.7% of respondents think the EU is not important at all, and another 14.8% do not know or cannot evaluate its importance. The trend is similar to the one in 2015, when, in terms of innovation and technology the American public saw the EU lagging behind the US, Japan and China.

Development and assistance

On the issue of development, the EU is seen as playing a very important role by 33.6% of Americans and a somewhat important role by 31.4%, for a collective positive response of 65.1%. While the EU is seen as lagging the US (75%) and the UN (66.4%) in this issue-area, it is considered more important than other countries and organisations, including the World Bank (58%) in the list. The trend is similar to the one identified in the 2015 Study. Additionally, 19.9% of Americans think the EU does not play an important role in supporting developing countries, and another 15.2% do not know or cannot evaluate performance of the EU in this field. While some experts mention development as an area in which the EU is a leader, this does not have a direct relation to the US. According to focus group members, the EU's impact on US policy is also limited. The focus group graded development at 2.8 out of 5 according to its relevance and importance regarding EU policies in the US. Furthermore, the issue receives very little media coverage in the press sample with the EU's heightened visibility, likely because it is considered a less newsworthy event to attract readership. While the EU is considered a leader on development globally, this type of view is not always reflected in media or tied to US concerns.

Social

On social development issues, most Americans believe the EU performs either very good or fairly good on the overall quality of life (57%), level of education (56.9%) and employment opportunities (50%) – a trend similar to the one in 2015. In addition, respondents rank the EU's performance in the categories of "very good" and "good" between 40% and 50%, in decreasing order, for climate change activism, social justice, equality between men and women, protection of minorities, reducing income inequality and eradication of poverty. While still positive, the three lowest ranking social development categories are integration of migrants and refugees (40.7%), reducing income equality (40.6%) and eradication of poverty (40%). The same three categories were also ranked the lowest in 2015, yet lower than in 2021: back in 2015, only slightly over 30% of respondents ranked the EU's performance in these sectors as good. Moreover, attitudes towards the EU on protection of minorities have also improved: (42.8%) in 2021 vs 33% in 2015. The trend is supported by the findings of interviews and focus groups. Focus groups participants reveal positive sentiments towards the EU's approach to social policy and the environment and anticipate positive improvements for the EU after a more difficult period highlighted

by Brexit and democratic backsliding. However, US experts do see social issues as a source of strength for the EU and consider it to be the area of the EU's normative leadership. They also claim the EU's social policies have affected the US policy, especially on issues such as healthcare. Some experts see it as a model for the US to emulate.

Culture

In the US *traditional media* sample, the EU does not feature prominently in the cultural field. However, the American public is attracted to the EU's culture and lifestyle: 62% of respondents find the EU very attractive (29.3%) and somewhat attractive (32.7%). This contrasts with 22.9% who are not very or at all attracted to the EU's culture. Finally, 15.1% do not know or cannot answer. When it comes to the perceptions of the EU in specific fields of culture and sports, food and cuisine are considered most positively (60.6% of respondents – 30.2% “very positive” and 30.4% “fairly positive”), followed by history (59.5%), arts (59.2%), monuments and museums (58.7%), lifestyle (57.4%), music (56.6%), luxury goods/clothes (56.3%), theatre/cinema (54.9%), modern architecture/design (53.7%), sports (51.2%) and multiculturalism (50.7%). The issue-area that receives more negative evaluation is multiculturalism (6.4% of “fairly negative” and 2.8% “very negative” evaluations and the highest share of responses “do not know/cannot answer” – 14.4%). It should be noted that culture and sports are much more associated with Europe than the EU (Figure 113) in the mainstream US media, as the latter is much more associated with politics and economic issues. Experts and especially focus group participants highlight cultural connections with the European continent and Member States when discussing their own experiences and describe the EU more as a policymaking and governance body. Yet they also point to the untapped potential of the EU in the cultural field – particularly via tourism and pop culture (Eurovision seen as one of the examples here). Important here is that similar to the findings of the 2015 Study, Europe remains an attractive tourist destination, and the US survey respondents continue to share positive perceptions of all areas of European culture. Their preferences also remain stable (historical heritage, arts, food and cuisine over sports, music, theatre and cinema).

Health

Health is the issue-area of the EU- heightened visibility in the 2021 US media. In the sample of 100 media articles analysed within the qualitative protocol (i.e. articles where the EU is of a major focus), it is the top theme in the *Washington Post* (8/13 articles), second in the *Wall Street Journal* (16/46) and third in the *New York Times* (15/41). This is not surprising given the context of the global pandemic, which propelled health and health policy to the top of the public agenda. Due to its policy and regulatory nature in Europe, health is associated more with the EU than Europe in the US media. In contrast, in the field of medical research and global health, US public opinion respondents see the EU as performing relatively well (56.6% and 56.9% of “very good” and “fairly good” replies respectively). Nevertheless, the actions of the EU in these fields are seen less favourably than its action in other fields such as tourism or global trade (63.3% and 61% respectively). However, experts and youth, whose views were likely formed well before the pandemic, do not focus on the pandemic, or health as a high-priority issue, especially in relation to EU health policy and its influence in the US. There has been some interest and admiration, however, in how the EU provided its citizen with universal healthcare and criticism of the US for prioritising other spending at the cost of doing so at home. According to one student, most Americans do not ‘understand why the US government is spending billions on stationing soldiers in Europe as opposed to providing [American] with healthcare and educational opportunities’. Experts also see EU health policies in the context of social affairs rather than the pandemic.

Continuity and change behind actorness

While the perceptions of the EU's actorness are largely affected by specific crises, such as the pandemic, there is continuity in the general trends. In 2015, politics dominated the debates in media around the

migration crisis and the prospects of Brexit, followed by the economy, which covered the economic crisis in Greece and its effects in Europe. In 2020-2021, the global pandemic has been the gravitational force of EU activities, and it attracts the largest share of social and traditional media reporting.

Beyond junctural crises, the thematic frames of politics and economy continue to have significant coverage. The EU as an actor is clearly visible on both traditional and social media in relation to the global economy, and the public view the EU as an important trading partner with the US and an investor in the country. On global political leadership, there is continuity with the findings of the 2015 report, in which about half of Americans believe that it is very or somewhat desirable for the EU to take a strong leadership role in the world, behind the higher ratings for the US itself and comparable to Japan. However, many Americans recognise that China is becoming stronger and likely to continue gaining strength going forward. This puts the EU in a difficult position, as it must at times 'navigate its relationship with both the US and China as relations between the two remain cold or grow colder' (USFG). One interviewee also marks that he performs more flights to Asia than to Europe.

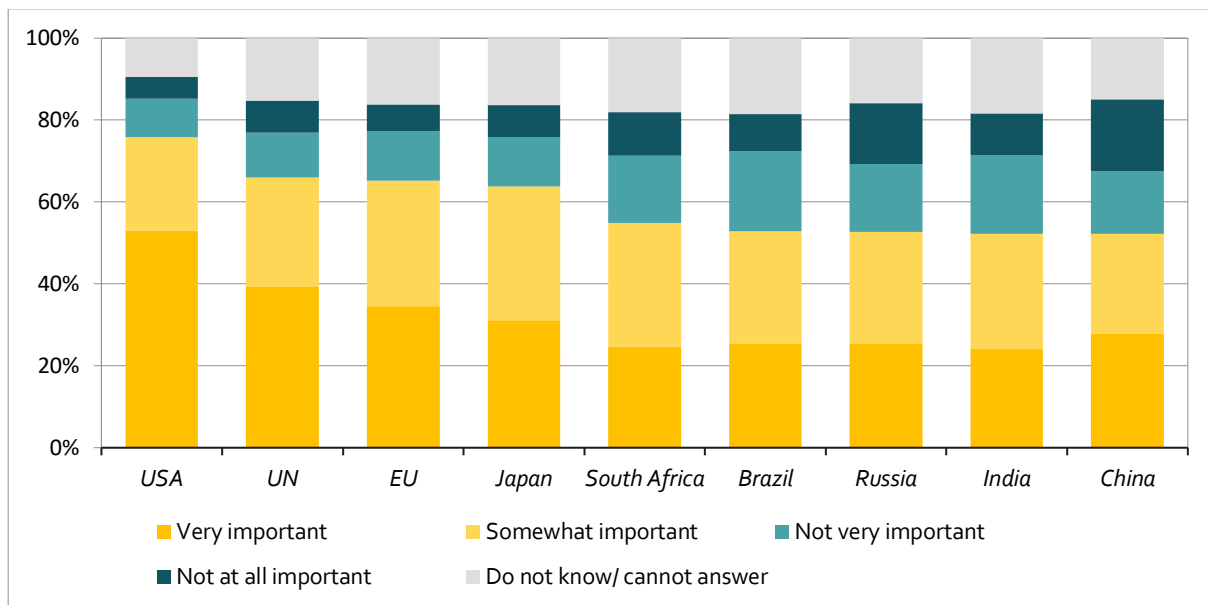
In terms of the EU's international political role, most Americans believe that the EU plays a positive role on supporting international cooperation and maintaining global peace and stability. Additionally, many young people in the focus group mention that the EU has a positive role on the world stage in normative areas such as the environment and development, even though its overall international impact is not fully realised. On the issue of development, the US public perceives the international actorness of the EU as significantly behind the US and UN, although well ahead of other countries and regional actors. Since 2015, EU environmental policies are perceived as positive by media and public and are also referenced by some of the interviewees.

Following the same trend as in the 2015 Study, the EU's visibility in traditional and social media of energy, research, science and technology, and culture is lower than in other thematic frames. These issues are not among the priorities for the surveyed public and interviewed youth. Energy is also not considered a significant topic by experts when it comes to relevance to US policy. While the US is considered the most important country for advancing innovation and technological progress, both China and Japan are viewed as more important than the EU. However, the public is attracted to the EU's culture and lifestyle and several interviewees indicate the relevance of further EU-US cooperation in education.

1.13.4. The EU as a norm-setter

Overall, the American press tends to overlook the EU's normative role. Even in the news with high EU visibility (from the qualitative sample in our analysis), it is rarely mentioned as a norm-setter. In fact, the EU appeared in the normative frame in only 17 articles out of 100, and even then, the normative theme was not the primary focus of the articles. These articles looked at different issues such as problems with the vaccine supply including the ethics behind the decision to ban the use of the AstraZeneca vaccine (negative), the EU's regulations in technology (positive) and sanctions against China for human rights violation (mixed). Meanwhile, both students and experts consider the EU a norm-setter in several areas, particularly in the environment and climate change action, international development and internal social policy, such as healthcare policy, which many and especially younger adults in the US seek to emulate. The American public also ranks the EU high on the list of countries and organisations promoting and defending human rights globally: over 56% see it as very or somewhat important in this regard (Figure 116). However, the EU ranks third after the US (75.8%) and the UN (66.1%). In addition, 18.6% of respondents see the EU as not important in this regard, while 16.2% either do not know or did not answer.

FIGURE 116. PERCEPTION OF THE IMPORTANCE OF EU, OTHER ORGANISATIONS AND COUNTRIES IN GLOBAL HUMAN RIGHTS PROMOTION. USA



Note: based on Q11: In your view, how important, if at all, a role do each of the following countries or organisations play in promoting and defending human rights worldwide to protect human dignity, freedom, equality and solidarity? (n=1100)

US survey respondents find some similarities in values and norms between the EU and the US. Among those that the US public thinks the EU and US share the most are human dignity (63.2% of respondents), respect for human rights (60.7%) and justice (60.5%). Less than half of American survey respondents (47%) can say the same about democratic pluralist principles (vs 14.7% of those do not think so and 14.5% do not know or cannot answer). Finally, 46.6% of respondents think the EU is a good example of promoting gender equality for the US (11.9% disagree and 15.3% do not know or cannot answer). On the other hand, the top three values, in which Americans claim the EU and US have differences, are democracy (22.9%), equality (22.8%) and liberty (22.4%). The value which received the highest percentage of respondents indicating that they did not know or could not answer was pluralism at 31.5%. The situation is somewhat like the interviews and focus group findings. Young people consider the EU a normative leader in environment, development, and social policy, where, in comparison to the US, the EU is seen as being ahead. Experts also identify normative gaps between the US and EU on several policies related to the environment, social policy and defense/security. However, experts further point to the lack of internal solidarity in the EU and growing authoritarianism among some of its Member States (e.g. ‘further autocratisation in Poland or Hungary’) – perceived as impeding the EU’s normative image and the effectiveness of its foreign policy.

Moreover, while the general public still considers the EU an important international actor across a number of fields, they are invested in the US domestic politics more. Further, experts point to a shift in the US foreign policy towards the Asian vector that has been taken place for several decades. In time and due to the dominant role of domestic political narrative in shaping the interests and perceptions of foreign actors among the American public, this may lead to a loss of relevance by the EU among American audiences. As one interviewee claims, ‘the future of American-EU relations will be more cool-headed and less fraternal; the EU needs to do something to capture the American public imagination, to deliver new interesting ideas’.

Continuity and change behind the perception of EU as a norm-setter

In 2021, the perception of the EU as a norm-setter remains the same as it was in 2015. The attention to the EU as a norm-setter in the US continues to be limited in traditional and social media. In contrast, the public opinion survey indicates similar trends to 2015 in which the EU is seen as a partner that shares US values on human rights and justice but less so on democracy and pluralism. It also appears that similarities or differences in values vary across issue-areas and cohorts. One of the experts points to the fact that that, in the international arena, the EU and the US agree on the promotion of global normative standards, despite some differences: ‘In the case of China, the EU and the US seem to agree on several fronts regarding the relationship with China, while the case of Russia is more complex, as the US is more belligerent, and anti-communist and the EU is more conciliatory’. Meanwhile, half of the American public think that the EU is a good example of promoting gender equality for the US itself, while youth point to social policy and the environment. Finally, US experts acknowledge the normative global role of the EU, but also indicate that it is important for the EU to be more self-critical. One of the experts mentions: ‘In my engagements with EU officials, I have observed that they tend to be very normative and emphasise values... but often they have a hard time acknowledging the EU areas that are not quite bright’.

1.13.5. Continuity and change

The continuity of EU perceptions in the US is mainly derived from a combination of two factors that hardly change in a short period of time. These are the cultural background of shared history and values between the US and Europe and the US geopolitical weight of a global military power and the largest economy in the world. As one government official indicates, ‘I see the EU as an international entity... but if you asked me about EU leadership, I’m thinking of (Angela) Merkel.... And yet, I can’t tell you, who the President of the EU is, you know that the central government for the EU is just not there now’. However, according to expert and focus group interviews, some factors advance the perception of the EU as an evolving entity.

Similar to the 2015 Study, one of the drivers of change in EU perceptions is the perceived capability of the EU to respond to challenges and crises (*EU-specific*). From Brexit to the COVID-19 pandemic (*global factor*), the inherent projection of weakness, inefficiency and internal disagreements has negatively affected the perceptions of the EU in the US. Along US (*location*)-specific factors are the US presidential elections, which have produced adjustments in the US-EU agenda. Former US president Trump was particularly critical of the EU on trade and defence and projected negative narratives about the EU, which appear to still have a hold in the eyes of the American public. In contrast, the Biden Administration has implemented strategies oriented to revamp the cooperation with the EU. The EU, like many other former largely apolitical subjects, is now increasingly being viewed from a partisan angle, with conservatives/Republicans becoming more populist/nationalist, and viewing the EU increasingly as a rival and threat. The EU has become, in a way, another divisive issue, like so many other dividing Americans. However, liberals/Democrats and younger Americans continue to see the EU positively and more as a partner. In the focus group, positive sentiments about the EU and normative leadership role were common. For example, on participant mentioned that they view the EU, ‘Generally continuing to be a model for cooperation (if somewhat flawed), while setting positive standards in areas like social issues and environmental policy’. Finally, experts also point to the ongoing shift in the US foreign policy priorities to Asia and particularly China due to the growth in that region: ‘In the latter years of my career, I was on planes to Europe far less and on planes to China quite a bit’.

1.13.6. Recommendations for EU public diplomacy

The American public generally views the EU in a positive light based on a relatively high degree of shared values (particularly human dignity and justice). However, beneath the surface of this generally

optimistic impression, surveys that examine trends by political affiliation find a growing divide regarding perceptions of the EU, with liberals/Democrats remaining largely positive and conservatives/Republicans becoming more negative (Devlin, 2019). Interviewed experts explain this as a general and more historic conservative dislike for a “big government” and bureaucracy in the US, and a growing adoption of a more nationalist and nativist typology of conservatism associated with the former US president, who was a supporter of Brexit and critic of the EU on trade and foreign policy. These trends show up in minor ways in the public opinion survey, such as the relatively lower level of perceived convergence between the EU and the US on values such as multiculturalism and pluralism, and higher negatives and “do not know/will not answer” responses on these factors. The American public also remains less knowledgeable about specific EU actions and policies, which hinders the EU’s perceived actorness.

According to EU practitioners, due to limited budgets and a desire not to get involved in contentious partisan US politics, EU efforts have largely targeted audiences considered to be supportive of the EU in public diplomacy efforts. This has meant less visibility outside the major cities and coastal regions of the United States and lower presence of people who have not yet “bought” the idea of the EU. EU experts, especially those in parts of the country that are more rural and conservative, mention a lack of presence and awareness about the EU by the public in those regions and a perception that it is not present in the “heartland” and focuses mostly on Washington DC and other big cities. This lack of “telling its story”, however, can also create a void in which more negative narratives can take hold and shape opinion.

In 2020, the population of the US was 329,484,123 – third after China and India. In 2019, about 16.5 % of the US population was 65 years old or over, a trend expected to increase to 22% by 2050. While the American population is ageing, it is also becoming increasingly diverse (Frey, 2021). The median age in the US is currently around 38 years, expected to increase alongside an increasingly ageing population. The highest share of the population lives in the South of the US, second to the West, followed by the Midwest and the Northeast. Most of the US population lives alongside the Atlantic and Pacific coasts. Such demographics should be accounted for in EU public diplomacy initiatives for the United States.

If the EU wants to reverse the overall growing negative trend towards how it is perceived in the US, it needs to engage with segments of the population and regions that have grown more negative towards it in recent years. This may involve creating different messaging that appeals to those populations and regions. For example, one expert has mentioned that the EU created a public relations campaign to highlight the number of jobs it was creating in a particular state when there was pressure to increase tariffs on it during the last administration. Two experts indicate that there is a need for the decentralisation of EU Delegation or opening of new offices in other cities of the US to raise the profile of the EU beyond Washington DC. Highlighting the economic benefits and cultural ties that the EU brings to the US, for example, could be one way to reframe the EU in conservative and rural parts of the US. The EU should consider putting more resources into such efforts to increase its soft power with these audiences, as a lack of focus can lead to long-term loss of soft power and influence, and less public resistance to future policies unfavorable to the EU.

Furthermore, the body of research in this study has identified several recommendations, both short- and medium-term, that the EU should consider in its public diplomacy efforts. These are outlined below by theme, using direct quotes from contributors. Among the themes where the EU is most visible and prospective in the US are the environment, social policy and research, science, and technology.

Theme: Climate and environment

The theme of the environment and climate change is an area in which the EU holds historic and current credibility and is considered a normative leader by the US public and experts. Given the

global nature of climate and environmental issues, there is potential for the EU to unite public diplomacy efforts and its goal to rally allies to reduce global carbon emissions. The change in US Administrations in 2021 provides an opportunity to work closer with the United States to this end. Further, the regressive stance of the Trump Administration has fostered the beginnings of relationships on climate and environment with climate progressive states such as California, enabling subnational outreach and engagement.

Policy aims

- To maintain and promote the image of the EU as a leader and norm-setter in the area – in close relation to the US agenda on the environment and climate change.
- Rally support for multilateral ambition on climate change and the environment and net zero by 2050 on the federal and sub-national level.
- Demonstrate joint EU-US leadership in climate.

Medium to long-term steps

- Fine-tune the EU and US' messages on climate and environment to advance to mutually beneficial cooperation at the strategic level (deepening institutional ties, exchange best practices on green energy, environmental protection, and sustainability).
- Increase cooperation with the US on federal and sub-subnational level, and jointly establish new standards, initiatives, and partnerships.
- Formalise partnerships with sub-national states such as California, cities, regions, and businesses.
- Facilitate and engage on the US recovery package, the economic growth narrative and link discourse to the EU Green Deal.
- Cooperate closely with private sector and philanthropy as well as governmental and civil society actors to increase effective coordination at the international level.

Short-term steps

- Showcase progressive and ambitious environmental policies and leadership of the EU by engaging with influencers, increase social media campaign, and climate as part of the EU Delegation's long-term public diplomacy strategy.
- Launch joint campaigns to target both the public and decision-makers, federal and sub-national actors such as states and cities; Include schools, universities and businesses in campaigns and invite stakeholders to co-lead and co-craft these campaigns; Focus on broader audiences on the subnational and city level especially the wider population while focusing on political and governmental actors in Washington DC; Engage with US stakeholders on narratives that speak of clean growth, just transition and health to improve a joint narrative.
- Engage political stakeholders receptive in Green Deal language and facilitate a frequent working-level dialogue among governmental partners as the US is setting up its climate and environmental portfolio and institutional architecture post-election.
- Support US announcements on progressive climate and environmental policy.

- Conduct EU-US city dialogues and facilitate joint agreements (in the form memorandums of understanding, letters of intent, letters of cooperation, joint declarations, and working agreements) or signing up to initiatives on city climate neutrality and commitments.
- Bring together the UN, the UNFCCC, the US, and the EU in frequent senior-level engagements especially on the post-2020 finance and agenda and international support for energy transition projects in developing and emerging economies.
- Conduct sector dialogues to exchange best practices on climate technological innovation, clean energy power and systems.
- Support climate and environmental CSO and NGO actors by facilitating frequent exchanges between US-and EU-based climate CSOs and NGOs while also including CSOs and NGOs from other continents; consider regional dimension here (Canada, Mexico – depending on priority topics in the environment and climate change there).
- Build alliances with likeminded US organisations and businesses, potentially sponsoring events with them to raise the EU's profile and promote mutual interest.

Whom of key audiences to involve

EU Commission, EU Delegation, US Government; Ministries (working-level); Progressive politicians and influencers that share a Green Deal narrative; States (such as California); Cities including mayor offices; CSOs; NGOs; philanthropies; businesses in the renewables sectors; 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; EU Member State Embassies; Climate advocates.

Theme: Politics/Normative

This theme is blended and combines several crucial sectors: the EU's domestic politics, EU external relations and the EU's outreach in the US. In these issue-areas, the EU's normative image and EU values in the international and US contexts shape the complex picture of how various US audiences view the EU. On the one hand, youth and the general public see the EU as an example for the US to follow in social policy and the environment, while, on the other hand, both experts and the media are concerned with the EU's democratic backsliding (Poland, Hungary) and the perceived lack of solidarity in light of the COVID-19 pandemic. These issues are believed to impede the EU's normative image and potential for cooperation with the US. The EU's image is further downplayed by the higher perceived relevance of EU Member States vis-à-vis the EU among US experts. The shift to the Asian vector in the US foreign policy may further reduce the EU's significance in the country. This section of public diplomacy recommendations focuses on how to achieve maintenance of and consolidate the EU's relevance to the US, especially with specific target groups who may be able to function as multipliers.

Policy aims

- To create a coherent image of the EU ("brand EU") that balances differences and shared principles among EU Member States to external publics while pointing to "set in stone" principles of the EU and its members (social democracy, consensus, diversity, and other values, positively appreciated by the foreign/US audiences).
- Cast an image of a reliable partner with a set of values that serve as a base to build strategic, durable partnerships irrespective of political changes and crises.

Medium to long-term steps

- Be proactive in voicing the EU's position based on a long-term strategy and by incorporating new tools of outreach.
- Focus on issues that are important in relation to the US, this should consider issues that speak to interests and concerns of the US, e.g. trade, security, technology, and its public – climate, environment, social policy (especially diversity) and (multilateral) norm-setting.
- Recognise and emphasise differences among EU Member States (one interviewee compared an American living in Massachusetts to an Italian living in the EU – a narrative/comparison worth exploring for devising a message).
- Emphasise both similarities and differences in values between the EU and US, pointing to those that may benefit both partners or those that the partners may emulate/learn from each other (the “listening” aspect is here, as the process is reciprocal).
- Emphasise the “like-mindedness” and historical ties between the EU and the US, their strategic partnership and normative convergence internationally especially since the new Administration (within the corpus of international organisations or on the example of more recent normative actions such as combined sanctions against China or sanctions against Russia) – feeds into the US' self-perception of a global actor as well.
- Develop a “one voice” strategy that would set up a stage for EU messages at the time of crisis or emergency – already embedding the positions of all Member States on the issue (interviewees find it confusing to receive different messages from the Member States vis-à-vis the EU).
- Invest in a network of media contacts to promote such messages swiftly when the news is in the making.
- Work closely with EU Member States Embassies to share best practices, experiences, and channels of communication in the US.
- Develop a strategy on addressing the issue of security on the European continent and the role of the EU in it – this issue has been continuously revoked by interviewees impeding EU-US cooperation and mutual understanding.
- Advance regional cooperation – the EU is appreciated for free trade regulations and is cooperating with Mexico and Canada – both being crucial partners for the US; a multilateral approach may “cement” EU-US relations.

Short-term practice-oriented suggestions:

- Communicate and explain EU actions in tackling its domestic problems, preferably with references to relevant US experiences and analogies (the US response to the events following 2020 elections).
- Use such communication events as a platform to inform audiences about what the EU is in order to break the image of the EU as a bureaucratic entity and explain the EU's functioning in a relevant and engaging way to the publics.
- Use communication events as a platform to inform audiences about other crises in the EU's/Europe's history and how they were overcome – further building onto the image of a resilient and capable EU;
- Point to how these negative events cannot affect other aspects of EU policies, where is successful (social policy, innovation, and technology).

- Maintain and develop annual Defence Forums, gatherings of experts in security and defence including staffers from the Administration, from Europe and the US and expand to areas such as climate security.
- Extend outreach in the educational sector: particularly higher education and schools (secondary schools) to enhance the understanding of the EU as an international actor – knowledge that the general public in the US currently lacks.
- Promote initiatives in the field of education and people-to-people contact (the Jean Monnet network; the Getting to know Europe, Public Diplomacy Fund, EU parliamentary initiatives, and particularly Horizon); reduced funding in the field is seen as hampering the promotion of knowledge about the EU in the US.
- Engage US experts for consultancy and establish “critical friend” advisory groups that can help devise specific public diplomacy initiatives (on support for minority groups, diversity, and inclusivity) for example); interviewees engaged with the EU are ready to assist.
- Continue partnerships with the existing networks of think tanks and CSOs but continuously browse for new organisations and partners; avoid NGO-crazy, this would prevent from EU audiences to be “self-selected”, e. g. already having a positive relationship with the EU or Europe, or a group of regular attendees.
- Add a policy dimension to existing institutional frameworks.
- Reach out to communities beyond the Washington DC by focusing on large cities and urban populations; use Jean Monnet networks and education initiatives to reach out to regional audiences; interviewees claim they attempt to engage up to 50% of external publics to their events.
- Explain EU norms and standards and engage US businesses in the process – this would not only advance to the EU’s image of an economic leader but also increase its relevance for domestic actors in the US; target regional producers and smaller companies – these are not yet into the idea of the EU and allow to broaden the outreach (one expert points to a growing competition among foreign investors in the state of Massachusetts as an example of why it is important to be present in smaller cities and “anchor” the image of an international actor with “real” impact such as jobs and investment).
- Another way to reach out to rural populations is to highlight more EU free-market oriented policies like free movement of goods as a way to counteract a potential partisan split on perception of the EU;
- Engage regional media.
- Keep in mind complex media landscape in the US where various media focus on various audiences; adjust the messages to these audiences while keeping the core message intact.

Whom to involve of key audiences

EU Parliament, Council of the EU and 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 (WWF), and the Union of Concerned Scientists (UCS); American Youth Policy Forum; UrbEd;

Theme: Research, Science and Technology (RST)

The EU is perceived increasingly as a norm-setter in this area providing knowledge and best practices for the US companies.

Policy aim

- Emphasise the benefits of newly adopted regulations that may advance both the general public and businesses in the long run; promote partnership with the US in the field

Medium to long-term steps

- Emphasise technological collaboration and strive to homogenise tech regulations and norms with the US colleagues bridging the divide with the US.
- Continue work in this sector and promote new initiatives in the field, promote new ideas, create content for more news and more discussion.
- Facilitate exchanges between tech start-ups in the US and EU; Establish a platform to connect European and American businesses to promote economic cooperation between them including frequent start-up exchanges.

Short-term practice-oriented suggestions

- Explain the contents of new regulations to US tech companies and beneficiaries in order to minimise critical backlash (with an emphasis on financial regulations, consumer protection, artificial intelligence, data protection).
- Run expos and exhibitions on technological innovation with US counterparts (mixed events may take place both in the EU and Europe to show collegiality).
- Promote academic exchange for sharing best practices.
- "Blend" this theme with the economy in terms of the benefits these standards will bring to those businesses that plan to enter the EU's market and the environment.

Whom to involve of the key audiences

EU Parliament; US Congress; EU Commission; European-American Chamber of Commerce; Big tech companies and start-ups in different regional hubs in the US and the EU; SMEs that may benefit from new regulations; Advocacy groups for digital rights; Influencers; EU Member State Embassies; National Business Association (NBA); National Small Business Association (NSBA); Women's Business Development Center (WBDC); Minority Chamber of Commerce.

Theme: Culture

The EU scores high in its performance in culture but particularly in tourism. However, the EU is less visible in this issue-area in comparison to Europe as a whole and with regard to individual Member States. Nonetheless, focus groups participants and experts point to numerous personal and work connections in Europe that may be utilised to increase the visibility of the EU in a positive manner.

Policy aims

- Establish the image of the EU as cultural entity that extensively supports the cultural diversity of its Member States.

Medium to long-term steps

- Increase the EU's representation in Hollywood and pop culture more broadly (one interviewee has referenced Eurovision as such an example).

- Support tourism and early cultural exchange programmes for schools and university students.
- Promote bilateral cooperation with the US in arts.
- Engage European diaspora in the initiatives and build networks with these audiences.

Short-term practice-oriented suggestions

- Increase the EU's presence in the states and cities of the United States through cultural events and fairs;
- Implement successful initiatives in the field from other Delegations and EU Member States.
- Cooperate with Member States (cultural centres, French/German etc. study centres) and participate in their events.
- Promote arts in general and performance arts not only to entertain but potentially inform about progress and new ideas in the EU.
- Run EU-US heritage projects.
- Organise EU days in US museums and vice versa.
- Organise song/arts/culinary competitions, etc.
- Use networks in the education sector to promote exchange and cooperation in the cultural field in this area.
- Actively promote tourism to the EU through influencers on Instagram; allow Instagram Lives of influencers travelling to destinations in the EU (including EU agencies and institutions).

Whom of the key audiences to involve

EU Commission; EEAS; EU Member States Cultural Institutes; the European Union National Institutes of Culture (EUNIC); Smithsonian Institution; Network in different cities of the Goethe-Institute; Societa Dante Aligheri; and Alliance Française; National Trustt 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.