



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

FINAL REPORT

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

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

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LIST OF ACCRONYMS AND ABBREVIATIONS

AA	Aggregate analysis
AFP	Agence France-Presse
ASEM	Asia-Europe Meeting
ASEM-DUO	Fellowship programme supporting exchanges of professors and students between Asia and Europe
ASI	Agency for strategic initiatives
AGOA	African Growth and Opportunity Act
AIIB	Asian Infrastructure Investment Bank
AP	Associated Press
API	Applications Programming Interface
BBVA	Banco Bilbao Vizcaya Argentaria, S.A. (BBVA), a Spanish banking group
CC	Country Chapter
CE	Country Expert
CIDE	Centro de Investigación y Docencia Económica, Mexico
COP21	The twenty-first session of the Conference of the Parties
DAC	Development Assistance Committee
DFID	Department for International Development
DG COMM	Directorate-General Communication (European Commission)
DPA	Deutsche Presse-Agentur
EC	European Commission
ECB	European Central Bank
EEAS	European External Action Service
EP	European Parliament
EPA	Economic Partnership Agreements
EU	European Union
EUNIC	European Union National Institutes for Culture
FDI	Foreign Direct Investment
FIFA	Fédération Internationale de Football Association
GMO	genetically modified organisms
ICC	International Cricket Council
ICI-ECP	Industrial Countries Instrument Education Cooperation Programme
IMEMO	Institute of World Economy and International Relations
ISTC	International Science and Technology Centre
KOTRA	Korea Trade Promotion Corporation
LCE	Lead country expert
LitRev	Literature review
MA	Media analysis
MGIMO	Moscow State Institute of International Relations
MS	Member States
NAFTA	North American Free Trade Agreement
NCRE	National Centre for Research on Europe
NFG	NFG Research Group 'Asian Perceptions of the EU'
NGO	Non-governmental organisation
NTT	Networked Think Tank
OAS	American Societies
ODA	Official development assistance
OECD	Organisation for Economic Co-operation and Development
OHL	OHL, a concessions and construction group
PD	Public Diplomacy

PO	Public opinion (poll)
PPMI	Public Policy and Management Institute
R2P	Responsibility to protect
R&D	Research and development
SMB	Small and medium business
RS&T	Research, Science and Technology
SAOSO	South African Organic Sector Organisation
SP	Strategic Partner
STR	Stock Taking Report
TTIP	Transatlantic Trade and Investment Partnership
ToR	Terms of Reference
UNSC	United Nations Security Council

1 INTRODUCTION

This study was requested by the European Commission's Service for Foreign Policy Instruments (FPI). Its main objective is to provide a thorough analysis of the perceptions and images of the EU and Europe, and of the EU's policies in several regions of the world (North America, Latin America and the Caribbean, Asia) with a specific emphasis on the EU's Strategic Partner (SP) countries:¹ Brazil, Canada, China, India, Japan, Mexico, Russia, South Africa, South Korea, the USA. The study aims to gain a better understanding of the perceptions of the EU and Europe in various policy domains (such as economy, trade, politics and security, development, migration and multiculturalism and human rights, environment and energy, research, science and technology, culture, education) and across different target groups/ audiences. It was designed to contribute to future EU Public Diplomacy outreach activities, so that messages and themes could be fine-tuned to local conditions, facilitating a more meaningful and effective EU engagement globally. It is part of a broader effort undertaken by the Commission in revisiting the EU's Public Diplomacy which includes, among others, the development of the EU Global Strategy, rethinking of the EU narrative as well as Preparatory Action 'Culture in EU External Relations'.

In accordance with the Terms of Reference (ToR), the study encompasses:

- An analysis of the core themes in each Strategic Partner country on which EU action should be focused in order to obtain greater impact (see Chapters 2 and 3 of this report)
- An analysis of trends in each Strategic Partner country as well as at regional and global levels and for each target audience (Chapters 2 and 3)
- An analysis of the target audiences in each Strategic Partner country (including policy-makers, media, business community, academia, youth, etc.) (Chapter 4.1)
- An analysis of potential partners in each strategic country with whom the EU could run future projects and research activities (Chapter 4.2)

The analysis performed and data collected is presented in the form of a baseline (Chapter 5; see also e-folder with project material). The summary findings and policy recommendations are presented in Chapter 6.

The study analyses the perception of both the EU and Europe because frequently perceptions of the two terms are intertwined. While people are often not quite familiar with the institutions and/ or policies of the EU, they may have associations about Europe (e.g. European culture, history, welfare, politics or Europe as a tourism destination). In turn, these associations are sometimes influenced by policies and initiatives of the EU. Indeed, Europe is often used as a brand in the EU's Public Diplomacy.

Furthermore, the term 'European culture' as used in this study derives from the external perception in the eyes of the partner countries this study is looking at. In many outside countries there is a perceived 'European' culture, mentioned for example in interviews and media, parallel to the awareness that there are different cultural zones and specific

¹ The European Union has official strategic partnerships with 10 countries to date; with these countries the EU holds regular meetings at the heads of state level and undertakes numerous other activities encompassing trade, politics and culture.

characteristics of the Member States. The 'European' culture in this usage is therefore an external perception that has been identified and expressed by non-Europeans. It does not presume or suggest the existence of a single or uniform European culture, disregarding diversity and distinctiveness of cultures within Member States.

This introduction provides an overview of the key concepts used in this study, outlines the analytical framework, describes the methodology and concludes with a summary of the study's structure.

1.1 Understanding perception

International relations scholars started studying perception as early as 1950s (e.g., Boulding 1959) and numerous approaches have emerged since then. In his recent review Mišík (2013: 448) distinguishes two approaches that have significantly informed the contemporary field of external perception studies – image theory and role theory. The two approaches analyse perceptions of decision makers albeit from different angles. 'Image theory considers decision makers' perceptions of other actors in the international arena, [whereas the] role theory predominantly deals with decision makers' views of their own state and how these perceptions influence the activity of the state in the global system.' Meanwhile, as argued by Chaban and Holland (2014), EU external perceptions research was led 'by the models used to explain EU international identity... as well as, EU foreign policy, capabilities and goals'; yet these models also draw on perceptions research as the key for understanding the EU's outreach to its foreign partners (see Holland 2005; Nunes 2011; Bickerton 2011; Pacheco Pardo 2012).

Perception is a multifaceted concept holding diverging definitions and connotations in different disciplines. While studies rarely engage in cross-disciplinary analysis, a possible bridge can be found in the theory of 'Othering' (Pickering 2001). From the international relations perspective, perception is a constellation of features that cluster together in a meaningful way (Hermann et al. 1997), focussing on the subjective notions of 'self' and 'other' that mutually shape images and expectations of actors, influenced by various factors (e.g. values, culture, personal experiences). The reaction to one's otherness can translate into positive or negative attitudes. Importantly, interaction between actors can lead to the mutual reformulation of identity and herewith to reformulation of perceptions (Peeren and Horstkotte 2007). Hence, the EU is also in a position to participate in the construction of perceptions among foreign audiences.

There is a strand of international relations scholarship, which analyses tools of 'soft' power (Nye 2004) and political influence from the perspective of the 'complex social processes of relationship building' (Davis Cross 2013: 3). The concept of perception is central to this scholarship. It sees Public Diplomacy as a process or an 'act of communication', which can take both government-to-people and people-to-people form. Participants of this process engage in discussion within their foreign counterparts (general public or specific groups) aiming, among other goals to communicate values, gain better understanding and exert political influence (Davis Cross and Melissen 2013).

Perceptions are complex constellations of meanings including cognitions on three levels – actor-centred (Herrmann 1985, 1997), location-specific (Tsuruoka 2008) and globally-oriented (Chaban and Magdalena 2014). There are numerous factors impacting and shaping

perceptions of the EU and Europe abroad: information or cultural programmes, popular media, academic circles, educational system, outreach and exchange programmes, or even publicity surrounding key individuals or events. Some factors such as global changes, historical entanglements and geopolitical proximity, differences and similarities in political systems and culture, as well as the linguistic constraints are external to the EU (Osterhammel 2003; Bachmann-Medick 2006; Stumbaum 2015; Stumbaum et al 2015). Other factors such as the public communication or EU's performance in the areas of global importance can be influenced by the EU.

In contrast to the one-dimensional approach of the previous studies, Chaban et al. (2012) argue that EU external perceptions are highly issue-specific. As a result, they find that EU perceptions are multi-layered and divergent across different issue-areas. Furthermore, by building on Braudel's (1982) model, Didelon-Loiseau and Grasland (2014) find that EU external perceptions are not only location and issue-specific but can have a temporal dimension. According to the model, time-related recategorisation of international actor's images occurs on three different levels: (1) *micro histoire* – happens in a short time span as a response to events such as war, revolution and crisis; (2) *histoire conjuncture* – occurs in a longer period (approximately 25-50 years) as a result of the factors such as economic cycles or political agenda; and (3) *histoire de longue durée* – occurs as a result of historical events, for example, colonial past or cultural or linguistic evolution over centuries. Further recent research also factored in local conditions that can have an impact on perceptions of Europe and the European Union – such as historical entanglements, differences in political system, education and training or cultural proximities / differences (Stumbaum 2015; Stumbaum et al. 2015).

Mutual perceptions held by different actors in the international arena affect their expectations about the other's behaviour and guide the interpretation of the other's actions – as well as the reactions of the perceiver. For example, if the EU is viewed negatively in one or another country/ region, it is likely that the majority of its actions, regardless of its content, will be misinterpreted and understood from a negative perspective as well. The fact that, with English being the *lingua franca*, a major part of non-European elites partly draw their perceptions and consequently critical assessment of current affairs in the EU from media that originates either in the UK (known for being rather EU-sceptic) or in the USA (being Euro-distant), represents one example of how perceptions are being shaped in a certain, potentially non-favourable way. Perceptions then guide the way actors make decisions and execute them. Thus negative perceptions of the EU/ Europe could potentially provoke unfriendly or harmful actions. Meanwhile, favourable perceptions might enhance the EU's influence and power. All in all, decisions and policies can be hardly explained without reference to the decision-makers' perceptions of other actors, specific groups or the public as a whole.

1.2 EU Public Diplomacy

EU Public Diplomacy in various countries and regions influences the perception of the EU/ Europe and can thereby impact on the effectiveness of EU's foreign policy and other initiatives. It matters because 'the further we move away from Europe, the fewer incentives the EU has on offer to promote its policies and institutions and the more it has to rely on mechanisms of persuasion and communication to make its case' (Börzel and Risse 2012). As

a result, the EU needs to know how its activities are perceived to address and tailor its Public Diplomacy accordingly.

The EU Public Diplomacy aims to raise awareness of its foreign policy goals and to positively influence the perception of the EU as an active and effective player on a global level (Davis Cross 2013; Melissen 2005a, 2005b, 2013), to promote EU values 'based on delivery of peace, security and prosperity' (*Information and Communication Handbook for EU Delegations* 2012: 4). Since its creation in 2009, the European External Action Service (EEAS) has been the leading EU institution in charge of communication and coordination of Public Diplomacy, in coordination with the Commission and the Directorate Generals with an external mandate. The EU Delegations are central for the implementation of EU Public Diplomacy abroad, not only distributing information on the EU but also telling the EU's narrative and success stories (Rasmussen 2009). A core challenge identified by Duke (2013) is the conflict between internal and external aspects of the EU's Public Diplomacy, as the internal narrative of EU identity (itself an on-going process) can hardly be employed in foreign relations. Another point of contestation is the competition with the Member States, who often view Public Diplomacy part of their national diplomacy and hardly see the benefits of contributing to an EU Public Diplomacy, for example in the promotion of culture (Duke 2013). At the core of every Public Diplomacy initiative is hence the question *what* should be communicated and *how* this communication can be coordinated to send a coherent message across borders (Henrikson 2006).

The Partnership Instrument (PI) for cooperation with third countries was established in 2014 to enhance 'widespread understanding and visibility of the Union and of its role on the world scene by means of Public Diplomacy, people-to-people contacts, cooperation in educational and academic matters, think tank cooperation and outreach activities to promote the Union's values and interests' (Regulation (EU) No 234/ 2014: 1.2(d)). The main idea is to promote 'political values and political systems, such as democracy, human rights, rule of law, the EU's commitment to universal values; civil diplomacy of state building, of reform through engagement; economic diplomacy, the weight of the largest trading bloc, the most densely integrated market with its 500 million extremely wealthy consumers and businesses; EU as a force to be reckoned with in new fields, such as climate change, energy, smart development.' (Polonska-Kimunguyi et al. 2013: 141). To achieve this task, the use of media is the key to providing global access to information on Europe and the EU and to creating new ways of interactive engagement with global audiences (Grincheva 2012).

1.3 Analytical framework

Across all data sources, countries and methodologies, the research team has developed an analytical framework including research criteria, target groups, main themes and sub-themes as well as explanatory variables.

1.3.1 Key research criteria

Key research criteria used in this study include visibility, actorness and effectiveness, norm-setting and local resonance (see Table 1). These criteria help to operationalize the elements of perception to be explained in the research – in short, the research criteria illustrate **how** the EU and Europe are perceived along defined categories.

Table 1. The key research criteria

Criterion	Description
1. Visibility	Measures the extent to which EU/ Europe is visible across various themes and by different target groups.
2. Actorness and effectiveness	Actorness has two dimensions: (a) whether the EU/ Europe is perceived as active or not and (b) whether its actions are perceived as cohesive or non-cohesive. Effectiveness is the extent to which the EU is perceived as either successful or unsuccessful actor in reaching its goals.
3. Norm-setter	Horizontal/ penetrating criterion: focuses on the EU in terms of what particular action/ what kind of actor it is in relation to a list of the norms and values classified by the extensive literature as constituent to the EU as a 'normative power'.
4. Local resonance	The extent to which perceptions (on theme or otherwise) differ when the EU/ Europe is portrayed as acting unto itself and/ or globally vs. acting unto the country concerned, and/ or its neighbouring region. The criterion entails both a cognitive and a geographical dimension and is an 'in-between variable' in a sense that it does not only denote a specific perception but can also explain why the EU actorness, effectiveness or normative power is perceived in one or another way.

1.3.2 Explanatory variables

Explanatory variables are important factors shaping the perceptions of the EU and Europe across countries. Drawing on preceding research, the research team has developed a list of variables, presented in the table below. In short, explanatory variables aim to explain **why** the EU and Europe are perceived in a certain way in a given geographical/ local context.

The explanatory variables cover different, interconnected levels of analysis to ensure that **all levels** influencing perceptions are covered. On the global level, the variables 'geopolitical context' and 'economic (inter)dependence' are mainly (yet not exclusively) external variables that influence perceptions. On a country-level, 'culture', 'translation', 'history' and the 'political system' matter and are influenced by the global level and vice versa. On an individual level, 'age', 'education'/ 'sufficiency of information on the EU', and 'contact with Europe' matter. This level is potentially less connected to the global level, with specific country conditions influencing the individual's perceptions.

Table 2. Explanatory variables

Variable	Description
1. Culture	Cultural differences or similarities might lead to a preference for/ indifference towards/ rejection of EU policies. Specific cultures that value openness towards 'learning from the outside' might work positively for EU Public Diplomacy messages, e.g. China's openness to learning.
2. Translation	Differences/ similarities in language/ connotation and translation of terminology might lead to smooth or malfunctioning comprehension/ communication.

3. History	Historical ties might have an impact on what (key themes, trends etc.) is perceived as well as on how (connotations, evaluations etc.) it is perceived.
4. Education	<p>Training/ education can play a role regarding the shaping of perceptions:</p> <ul style="list-style-type: none"> - if it was acquired in a (non-) western/ European/ national context - depending on the degree of education/ training. <p>This study has also revealed that a significant correlation exists between positive attitudes towards the EU and the degree a person is informed about the EU.</p>
5. Political context	The political context is important for understanding the environment in which the EU policies are being implemented/ adopted/ adapted/ rejected. It can be assessed in terms of political system, strength of civil society, rule of law.
6. Age	The public opinion survey reveals that there is a strong correlation between people's age and their likelihood to regard the EU in general as well as its leadership role in a positive light.
7. Contact with Europe	Personal ties to Europe through education, study or training programmes are important means to generate positive perceptions of Europe, and indirectly of the EU.
8. Geopolitical context	The geopolitical context is another factor with influence on perceptions. In addition to the political context, the geographical dimension (regional disposition to the EU, proximity to the EU in the case of large countries) can play a key role in explaining perceptions.
9. Economic interdependence	The extent to which a target country's economy is interlinked with the EU can have a major effect on the perception, which may be heightened or lowered amid fluctuations in mutual trade or investment.

1.3.3 Main themes and sub-themes

The EU is active in a multitude of fields that the research team has identified and grouped into a list of themes and sub-themes. The list of themes is finite. The sub-themes were added as they surfaced in the data gathering; they vary across countries, methods and outputs.

Table 3. Main themes and sub-themes

Main themes	Indicative list of sub-themes
1. Economy, trade	Finance Investment Agriculture Industry Tourism Other sub-themes
2. Politics and security	<i>Internal:</i> EU institutions affairs (constitution, policies, strategies etc.) Human rights Other sub-themes

	<i>External:</i> Security (peace and stability, responsibility to protect (R2P), non-proliferation, counter-piracy, counter-terrorism, peacekeeping etc.) Foreign policy (neighbourhood policy, etc.) Effective multilateralism (intergovernmental affairs) Human rights (governance, democracy) Mass migration/ refugees Other sub-themes
3. Development	<i>Social internal and international</i> Aid/ poverty alleviation Disaster relief Millennium Development Goals Other sub-themes
4. Migration and multiculturalism and human rights	Migration Integration Refugees (EU as receiving and sending actor) Other sub-themes
5. Normative actor	Human rights Death penalty Other sub-themes
6. Environment and energy	Security of supply Sustainability Competitiveness Other sub-themes
7. Research, science and technology	R&D Innovation Intellectual property rights Research cooperation Technology transfer
8. Culture	Visual and performing arts History Music Heritage Creative Industries European lifestyle, values, norms Other sub-themes
9. Education	Secondary education Tertiary education

1.3.4 Target groups

The project team has also developed a list of target groups that was used to analyse the key target audiences and partner organisations for the EU outreach activities. Table 4 presents a generic list; for more detailed information and country-specific lists see Chapter 4.

Table 4. The target groups

Target group	Indicative list of persons/ organisations
1. Business	Business associations Managers of companies Business chambers of commerce
2. Youth	Persons aged under 30, potentially also fitting into the other target groups (youth leaders, students, etc.)

3. Academia and Think Tanks	Academia (particularly local experts about the country as well as experts on the EU and Europe) Analytical departments Think Tanks (political, economic, environmental etc.) Other influential members within the domain
4. Policy-makers	Members of parliament (including opposition) Members of various legislative groupings (commissions, committees etc.) Former members of parliament Members of government Other influential state officials
5. Civil society	NGOs Social movements Grass-root movements Trade unions Other influential members of civil society Artists, cultural personalities
6. Media	Television Press Online media Social media Radio
7. General public	'Ordinary people, especially all the people who are not members of a particular organisation or who do not have any special type of knowledge (as listed in the target groups above)' (Cambridge dictionary)

1.4 The methodology

The key methods applied in the study at hand include: literature review, public opinion survey, media content analysis, social media content analysis, as well as elite and group interviews.

1.4.1 Literature review

The literature review (LitRev), already part of the Interim Report, synthesizes into a single study the results of existing work concerning the perception of Europe, the EU and its policies in the 10 EU Strategic Partner countries and relevant regions. As a cross-country, cross-themed analysis, the LitRev provides an assessment of the state of the art of current research in this field. The analysis builds on the analytical framework as presented above: main themes, target groups, research criteria and explanatory variables.

This body of research on the perceptions of Europe and the EU is extensive, multidisciplinary and displays a great thematic variety. It has steadily grown since the early 2000s. Hence, one challenge in constructing a unified methodological framework for the literature review comes from the variety of methodological approaches – with a substantial focus on media analyses – as well as thematic and regional foci that have been employed so far. Comparability across previous research data sets and results was historically limited.

The LitRev systematically analysed 95 studies, articles and monographs covering 20 countries in English and national languages of the 10 Strategic Partner countries over a

period of 12 years (2003-2015). Ensuring a comprehensive structure of the literature review, the literature was listed and analysed along the following parameters:

- Reference time (publications since 2003)
- Methodological approach
- Affiliation of authors/ publishing context
- Main themes
- Research criteria (impact)
- Explanatory variables (local conditions)
- Target groups

The country teams were asked to complete a common template to guarantee comparability across countries and literature. It included a detailed table addressing different aspects of the sources listed as well as a section concerning the main research gaps. This template helped to gain a better understanding of the topics, policies and target groups most relevant in individual countries and regions. It furthermore pinpointed the areas which are heavily under-researched but still of critical importance for future EU Public Diplomacy. Gaps were thereby divided into four categories:

- Country-focused
- Theme-focused
- Target group-focused
- Method-focused

The LitRev report consists of three main parts: (1) overview of the state of the art of research on external perceptions of the EU, Europe and individual EU policies; (2) examination of EU Public Diplomacy programmes and initiatives across countries and (3) analysis of perceptions of individual Strategic Partner countries' towards the EU and Europe. The report concludes with the core findings that trade and economy are dominating themes; existing research is methodologically diverse, often descriptive and limited in themes, regions and groups analysed; Europe and the European Union are often used interchangeably. The report identifies further gaps and obstacles that could inform the design of future Public Diplomacy initiatives. The LitRev is presented in Annex II.

1.4.2 Public opinion survey

A better understanding of the current state of public opinion in outside regions and countries is crucial for the EU's Public Diplomacy activities. The literature review revealed that the availability of relevant public opinion data is limited and uneven across the target regions and countries. Therefore we carried out representative national surveys of public opinion in all 10 Strategic Partner countries. The comparative public opinion survey report is presented in Annex III.

Having considered a variety of options, we carried out an online omnibus survey in the 10 countries, with the exception of India, where a face-to-face survey method was applied. The surveys were coordinated by the Public Policy and Management Institute (PPMI) and conducted by TNS Global, which was responsible for data collection as well as ensuring methodological precision and robustness throughout the whole process. Survey questionnaires were translated into official languages of the surveyed countries. Multiple translations were available in Canada (French and English) and in India (Hindi, Bengali,

Tamil and Kannada). Data collection took place in August 2015. The table below shows the number of respondents in each country.

Table 5. Number of respondents of the survey (N)

Country	Total number of responses (N)
USA	1007
Canada	1022
Russia	1321
Japan	1024
China	1410
Brazil	1210
Mexico	1164
S. Korea	1238
S. Africa	1169
India	1056
Total:	11621

The survey results are representative for age, gender and region. Respondent profiles have been taken from the most recent national census data and other reliable data sources. The robustness of the results is guaranteed by extensive national online survey panels, the members of which were randomly selected (e.g., river sampling was not allowed), while the data collection and analysis process was subject to a number of filters and checks to ensure that any bias was removed as much as possible.

At the same time there were several limitations intrinsic to the use of online omnibus surveys: first, while online omnibus surveys were designed to be nationally representative, in some of the 10 targeted countries online survey panels were still relatively small compared to Western countries and the US. There was a bias with regards to respondent type, where respondents were more likely to live in an urban area and come from an affluent background.

The applied online omnibus survey included an upper cut-off age. That is, the age of the respondents was 16-64 in the US, Canada, Japan, Mexico, Brazil, South Africa, South Korea and India (16-65+); 16-54 in Russia and China. Online omnibus surveys have an upper cut-off age due to low incidences of internet users amongst older age cohorts in these countries. There was an increasing likelihood that if we included older ages in our online sample, opinions cited might not be representative of all older age people within a given country.

To address the latter limitation, we undertook two types of corrective measures:

- Boost samples: those allowed us to increase the upper age cut off limit by up to 10 years in the selected countries (Brazil, China, South Korea, Mexico, Russia and South Africa)
- Changing from online to offline (CATI) survey panels in the case of India

Importantly, besides age, gender and region, the following demographic data were available on each respondent and used in the analysis of the results:

- Education level
- Working status

- Social status
- Level of income

A good coverage of all age groups allowed respondents with a substantial variety of education or societal backgrounds to be reached; by comparison, such well-known surveys as 'As Others See Us or Trust Pays' by the British Council only covered the age groups of from 16/18 to 34).

1.4.3 Media analysis

Gathering information about the EU and Europe from the influential media is central to studying the flow of information where the EU and Europe is communicated to external audiences by third country opinion-formers. Images of the EU and its institutions are hypothesised to possess a heightened ability to influence attitudes towards Europe, the EU and its policies among the general public as well as to impact foreign policy making in these countries due to the so-called 'CNN-effect', which suggests that policy-makers react to the reality created by the news media, rather than to reality itself.

In our study, the media analysis explores how the discourse influencers in 10 EU SPs frame the EU and Europe and what aspects are selectively highlighted. Specifically, it examines whether the EU is seen as a 'normative' actor, a political actor within and beyond its borders, an economic powerhouse, the major player in the fight against climate change, a key higher education destination, a major provider of humanitarian and development aid, a transnational democracy, an innovation hub, a guardian of the human rights, the world's largest market, etc. Also, the analysis explores the perceptions of Europe as a cultural and historical hub, lifestyle and trend-setter, promoter of diversity and democracy.

Media analysis is focussed on the three influential newspapers in each Strategic Partner country – those with the highest circulation, national outreach, diverse ownership, differing political stances and unrestricted online access in each of the countries. To ensure comparability, the following criteria were applied to the preliminary choice of newspapers:

- All selected newspapers have daily circulation
- Three newspapers selected in each country – two popular prestigious newspapers with differing political affiliations and one business
- All chosen newspapers are in print circulation
- All newspapers are in the local language, not in English unless English is the official language.
- In bi-lingual countries at least one newspaper of each language is included (e.g. Canada).
- All newspapers are reputable
- The newspapers reflect diversity in ownership

The newspapers selected based on the above criteria and used for analysis in the target countries are presented in the below table.

Table 6. Newspapers selected for media analysis

Country	Newspaper 1 - Popular Prestigious	Newspaper 2 - Popular Prestigious	Newspaper 3 - Business
Brazil	<i>O Globo</i>	<i>Folha de São Paulo</i>	<i>Valor Economico</i>
Canada	<i>The Globe and Mail</i>	<i>The National Post</i>	<i>La Presse*</i>
China	<i>People's daily</i>	<i>Global Times</i>	<i>Reference News</i>
India	<i>The Times of India</i>	<i>The Hindu</i>	<i>The Economic Times</i>
Japan	<i>Yomiuri shinbun</i>	<i>Asahi shinbun</i>	<i>Nikkei</i>
Russia	<i>Russian Newspaper</i>	<i>Kommersant</i>	<i>Vedomosti</i>
South Africa	<i>The Star</i>	<i>The Times</i>	<i>The Business Day</i>
South Korea	<i>Chosun Ilbo</i>	<i>Joongang Daily</i>	<i>Donga Ilbo</i>
Mexico	<i>La Jornada</i>	<i>El Universal</i>	<i>El Financiero</i>
USA	<i>The New York Times</i>	<i>Washington Post</i>	<i>The Wall Street Journal</i>

*Francophone

Media analysis covered a period of three months (April 1 to June 30) in 2015. This period included a number of relevant international events such as Europe Day celebrations (May 9), G7 Summit in Germany (June 7-8, 2015) and the European Council meeting (June 25-26, 2015). It also included several critical events for the EU's community – the Greek crisis and discussion about Grexit; UK election and the discussion about Brexit; and finally the irregular migration/ refugee crisis.

Our selection of the analysis period offers a number of methodological advantages:

- Firstly, it allowed the observation of the media coverage of the EU and Europe in everyday 'regular' reporting and then facilitated the exploration of how the EU and Europe are profiled during big international events in relation to other global powers.
- Secondly, it enabled the examination of a wider range of thematic frames and assessed their relative visibility. The period of regular 'everyday' reporting is likely to cover a more diverse range of topics and policy areas, while the high-profile events provide a closer focus on specific policy issues.
- Thirdly, it allowed the tracing of the media profile of the EU and Europe in a new era – the EU is emerging from the Euro crisis and is under a new leadership. Also, there have been several significant international and domestic developments such as ongoing conflict in eastern Ukraine, Charlie Hebdo tragedy in Paris in January 2015 or the recent migrant crisis, which all have affected the image of Europe and the EU abroad. Consequently, our media analysis provides the most up-to-date baseline of EU perceptions.
- Fourthly, the three events falling under the media analysis period were also observed in our social media analysis, ensuring the dialogue between the two elements of research.
- Finally, our literature review and media research over the past 10 years builds an informative background to assess the current evolution of EU perceptions.

Media analysis is a complex and demanding process from both the organisational and research perspectives. Successful completion of this task relied on meticulous preparation, fine-tuned methodological framework, intensive trainings, constant guidance and communication.

Our media analysts observed and analysed the EU and Europe images presented via textual, visual and intertextual means, incorporating elements of content, cognitive and critical

discourse analyses. The press data was accessed via Press Display using PDF e-copies of the actual hard-copies thus warranting a high reliability and accuracy of the data yet avoiding methodological problems dealing with content differences between hard-copies and Internet editions of the papers. All sections of the newspapers were observed. Irrespective of the intensity of EU reportage, the news piece entered our database if it referenced the key words: the European Union/ EU, European Commission/ EC, European Parliament/ EP, European Court of Justice/ ECJ, EU Presidency, EU Council, Eurozone, as well as Europe and European.

The media researchers – pre-trained by the NCRE in its established media analysis protocol – coded all the articles in the database according to the protocol manually using the Google Doc platform to ensure efficient monitoring. All data was coded according to the pre-set categories to facilitate transparency, monitoring and follow up. A dedicated media data manager from the NCRE followed the data collection and analysis process in all 10 countries and provided feedback on a regular basis to each individual researcher.

Once the data collection process was completed, the media researchers carried out formal media analysis in their respective country. Formal quantitative analysis has informed us about the main trends in the framing of the EU and Europe in the influential press of the SPs. Formal analysis was followed by an in-depth content analysis. This included multi-faceted analysis of the issues reported, including their contexts, evaluation, local 'hooks'. Formal and content analyses resulted in a final media analysis report for each country and comparative media analysis report examining EU framing in 10 countries (presented in Annex IV).

In the course of media analysis we measured *visibility* of the EU and Europe; their *local resonance*; framing in terms of *norm-setting ability*; *actoriness*; and finally *emotive charge* of EU images. *Visibility* was measured using the following indicators: media volume; dynamics across time; degree of centrality (intensity); placement (premium vs. non-premium); length; and presence of visual support. *Local resonance* of EU media frames was assessed in terms of preferred news sources (local vs. non-local); focus of domesticity (reportage of the EU with or without 'local hooks') and presence of local actors. *Actoriness* was assessed through *thematic framing* (the EU's and Europe's actions in the fields of politics (internal and external); economy and trade; social affairs (including multiculturalism and migration); energy; environment; research, science and technology; culture; education; international development) and *actors* (EU and EU Member States). *Norm-setting* frames were assessed using a nine-member paradigm of norms and values argued within the 'Normative Power Europe' conceptual approach (Manners 2002): peace, democracy, liberty, human rights, good governance, rule of law, anti-discrimination, social solidarity, and sustainable development. The representations of these norms were examined across all thematic frames. Finally, *emotive charge* of the EU media frames was assessed in terms of evaluation (generic and in terms of conceptual metaphors) and semiotic analysis of the visual images (photographs and cartoons). Textual and visual images were additionally assessed for resonances/ clashes.

The comparative media analysis report is presented in Annex IV.

1.4.4 Social media analysis

Social media analysis provided systematic empirical insights into how communications of the EU and Europe are constructed, disseminated and received via the Twitter social media

platform, capturing one of the key communication tools not only for the younger generation, but also for opinion- and decision-makers worldwide. The social media analysis traced global views on/ reactions to the EU/ Europe and allows better understanding of who is reacting and responding to the official EU communication on Twitter and how EU/ Europe is perceived and understood in relation to the other global powers².

Social media analysis was centred on three international high-profile events:

- Europe Day (May 9, 2015) – data collection period May 8-10, 2015
- G7 Summit (June 7-8, 2015) – data collection period June 6-8, 2015
- European Council meeting (June 25-26, 2015) – data collection period June 24-26, 2015

These events present a good opportunity to analyse the global reception of Twitter messages communicated by the EU. The three high-profile international events are very different in their nature, which allows the examination of EU social media communication in specific yet very different policy contexts. The scope of analysis has been chosen in order to make the social media analysis manageable and feasible, given the overall project timeframe. Nine days of analysis generated tens of thousands of messages.

Data collection was conducted using the free Twitter Applications Programming Interface (API) through a set of relevant and inclusive keyword queries. For each event, we monitored a pre-set list of Twitter channels and hashtags. Twitter monitoring programme Mozdeh automatically queries API every 15 minutes for tweets that (a) are sent to or from EU Delegation channels, (b) originate from a number of other EU institutions' channels, or (c) are mentioned in any one of EU-related hashtags. Although the Twitter API does not return 100 per cent of all tweets for searches with a high volume of matches, in the case of this project the volume is not high enough to cause lost data and so it is likely that most tweets matching the searches during the time period were recovered. This excludes tweets that were filtered out by Twitter for apparently being spam.

The research process followed a three-tiered approach. Firstly, the project partners from the Statistical Cybermetrics Research Group at the University of Wolverhampton, gathered data around all three selected events and carried out *exploratory quantitative* and *exploratory content* analyses. At the final stage, the project team conducted *an in-depth content analysis* of the most prolific tweeters and manually analysed the individual contents of the most popular/ retweeted messages.

For the exploratory quantitative analysis Coword frequencies were used to detect the main topics for each channel and hashtag. This is a statistical procedure that essentially identifies words that are characteristic of a particular channel or hashtag in comparison to all other channels/ hashtags analysed. Its advantage is that it can be automated and so it is practical to apply it to detect topics in many different channels. Its disadvantages are that it is relatively crude, may miss topics that are expressed with common words or with multiple words, and will not work well for channels and hashtags with only a few matching tweets.

² Our analysis did not cover Weibo which is prevalent in China.

Exploratory content analysis used human coders to categorise a set of texts into meaningful categories. These categories can be predefined or decided by a preliminary investigation of a sample of texts. For this project, content analysis is applied to: (a) tweets mentioning any one of the hashtags, (b) tweets to and (c) from the EU institutions'/ officials' channels. One predefined category was used: sentiment (positive, negative or neutral). A topic category is defined inductively by coding a sample of tweets for topic, then clustering the sample by topic and deciding upon a coherent set of topics.

Finally, *in-depth analysis* of social media communications during the G7 Summit and the EU Summit utilises qualitative data based on the quantitative scale by employing methodology formed on news media analysis, which codes the Twitter data using a nuanced qualitative framework. Moreover, this research is informed by two important premises: 1) an evolving communications environment, in this case Twitter, is linked to the transformation of how politics work and informs our research (Castells 2009); 2) the online platforms offer 'for the first time, normative models of public spheres and cosmopolitan dialogue' (Miskimmon et al. 2013: 4). This allows for the two-pronged nature of the research output, one of which is a media product, able to be analysed for its content and 'highlights packaged in selective, framed communications' (Entman 2003), and the other one, which is evidence of a public opinion and public engagement mediated by online media. Hence, this analysis will help address the questions about the construction, communication, flow and effect of strategic narrative.

The research team conducted manual coding of the tweets on several levels in parallel with the media analysis in order to ensure comparability of data outcomes. The analysis involved coding according to framing categories, similarly to the media analysis. All data is inputted via Google Drive service to warrant transparency and follow up, and backed up in Microsoft Excel for qualitative processing. The authors of each tweet were identified manually through the reading of their public profile.

The social media report is presented in Annex V.

1.4.5 Interviews

The purpose of elite interviews (one-on-one and group interviews) was to produce non-representative samples per country as instruments to interpret and inform the findings of the other building blocks of the study. Given the timeline, scope and resources for the study, a representative interview sample was not possible for this research, but should be considered as an integral part of future updates. The non-representative sample provided a tool to reinforce and respectively check on findings from the representative findings from the other building blocks of the study. By means of 123 elite interviews, 12 EU Delegation interviews (two separate interviews in the case of two Delegations) and group interviews, the perceptions on the EU and Europe in the eyes of national elites as gathered through the building blocks of the study (LitRev, media, social media analysis, public opinion survey) were assessed and trends and challenges in those perceptions are reflected upon. The results of the interviews supplemented the main parts of the study and particularly provided indications for local conditions that influence individual perceptions, underpinning one of the study's core findings: the necessity of tailor-made, local implementation strategies connected with a centrally defined PD Strategy and a set of core messages.

The following target groups have been approached for the interviews:

- Youth: persons aged under 30
- Policy-makers: government representatives, the key policy-makers from the different political parties in the national parliaments, and high-ranking administrative staff from key ministries (foreign affairs, finance, development, economy, environment etc.)
- Business: leaders of business associations, high-ranking managers of companies dealing with the EU/ Europe, as well as leaders business chambers that connect the partner country/ region with the EU/ Europe
- Civil society: representatives of NGOs who are concerned with topics relevant to the EU (human rights, migration etc.), social movements and grass-roots movements, as well as trade unions
- Academia and Think Tanks: experts/ researchers on EU/ Europe across the main themes
- Media: journalists working on issues related to the EU/ Europe and its policies from TV, newspaper, online media, social media and radio
- EU Delegations across the 10 Strategic Partner countries (the heads/ deputy heads of Delegations, heads of press and information and (or) heads of political affairs and officers in charge of particular activities)

The exact combination and number of interviewees depended on the judgement of the Country Experts (CEs) and the accessibility to the elite. The limited number of interviews – due to the conditions and scope of the study – makes them non-representative, with the intention not being the production of representative quantitative data, but the aiding of interpreting findings from the other building blocks of the study and informing subsequent policy recommendations. The interviews do not aim to describe perceptions to a large extent, but to answer how certain perceptions are formed. The qualitative nature of the interviews allows for variations among interviewees across the countries.

In eight of the ten³ Strategic Partner countries, the CEs conducted one group interview, allowing for an open dialogue among several members from one or more target groups. The compilation of the groups was again subject to the judgement of the Country Experts who could judge best on their countries: in some countries it seemed to be more fruitful to bring together experts from the same target groups, in other a cross-target group interview provided more insights. Where the set-up of a group interview did not seem feasible according to the CE's assessment, the group interview was supplemented by four individual interviews.

The project team has developed the interview questionnaires, unified templates for transcripts and the coding tree, reviewed the list of interviewees as prepared by the Country Experts, and conducted interview training sessions during the Brussels workshop and via Skype. The interviews were conducted in the national languages, transcribed and, when relevant, translated into English. The CEs were also asked to provide interview summaries for each of the respective phases. The summaries provided an overview of most relevant results and possible trends. The NFG team conducted all interviews with the EU Delegations.

³ The CEs in the USA and in India decided to conduct 15 interviews instead due to availability of interviewees.

Concurrently, the NFG team compiled a 'Stock Taking Report of Practises in EU Public Diplomacy Outreach' (STR) that builds on the EU Delegation interviews, a thorough systematic review of current and past EU public diplomacy initiatives and unpublished working papers to supplement the joint study. The executive summary and list of recommendations from this internal working document is enclosed in Annex VI.

After the interviews, the NFG transformed the transcripts into a uniform template for coding. The coding tree used for the coding was based on the research framework developed for this study to cover all relevant aspects. The NFG used MAXQDA software for the thorough analysis and produced excel sheets with the number of codes and answers, as well as quotes to capture the different nuances of answers.

1.5 Structure of the study

The study is structured into an aggregated (cross-country) and country-specific part as well as the resulting baseline indicators and a section on potential audiences and partners. Chapter 2 presents the Aggregated Analysis of EU perceptions across target countries, drawing on all methods applied in the study ('building blocks'), including: the LitRev, media and social media analyses, elite and group interviews and the public opinion poll. Chapter 3 consists of individual Country Chapters on EU and Europe perceptions in all 10 Strategic Partner countries, and presents an analysis at the country-level drawing on all methods applied in this study that have country-specific findings including media analysis, elite interviews and interviews with EU Delegation officials and public opinion poll. Chapter 4 hones in on key target groups, audiences and potential partners. Chapter 5 presents the methodology behind the updatable database of baseline indicators that allows to measure changing EU perceptions in future studies. The database of baseline indicators can be found in e-folder with project material. Lastly, Chapter 6 summarises the study's findings and presents recommendations for the EU's Public Diplomacy.

2 GENERAL FINDINGS AND TRENDS (AGGREGATED ANALYSIS)

The EU is and remains mostly visible as an economic actor, secondly as a political one in internal affairs, while agriculture plays no longer a major role as compared to findings from previous research. EU leadership in global affairs is seen as likely/ very likely (22.7/ 36.7 per cent⁴) and desirable/ very desirable (34.9/ 18.9 per cent), yet not in Russia. The on-going migration crisis has increased the EU's visibility in the fields of migration, multiculturalism and human rights, but tarnished its image as not living up to its own standards. Also culture remains highly visible, yet it is rather linked to Europe than to the EU. The EU is almost invisible in areas of security, education, research, science and technology, environment, energy and international development, despite its major investments in these fields. Educational and social standards within the EU are seen as high, yet general knowledge on how to access EU educational programmes is low. In the area of environment and climate change, the EU is seen as a norm setter and desirable partner.

2.1 Introduction

Across all analysed themes and data, the EU as well as Europe are most visible and perceived as most effective in economy, including tourism, trade and business, although this assessment has decreased due to the Eurozone and Greek debt crises. The second most visible area is internal politics: aside from the effects of the migration crisis and the impending 'Brexit' and 'Grexit', the EU is seen as active and effective mainly within its borders. Yet, it is eclipsed by the Member States, which are still considered much more important. Findings are quite the contrary in external and security affairs, where the EU's effectiveness is still seen as limited, though its leadership is seen as likely and as desired. Culture is also an area of high visibility that resonates to the publics across all countries, but is much rather connected to Europe than to the EU.

Visibility in the area of migration, multiculturalism and human rights has sharply increased due to the migration crisis in the Mediterranean⁵ and the EU's as well as Europe's actions are mostly perceived in a negative light across countries. This also reflects on the perception of the EU's normative actions: the EU is evaluated as providing a high standard of living to its citizens, but at the same time as not meeting its standards in its treatment of migrants. Surprisingly, both the EU and Europe remain hardly visible within thematic areas of research, science and technology (RS&T), environment and energy as well as development and education – the latter being two areas of enhanced EU engagement; however, despite its low visibility, the EU is considered mostly as an effective actor in providing high educational standards for its citizens and – evident in the reporting on the upcoming COP21 – desired partner and even as a norm setter in the area of environment.

In the course of the two major crises currently facing the EU – the Eurozone/ Greek debt crisis and the migration crisis – perceptions have shifted towards a more negative evaluation of the EU's economic power (Greek debt crisis) and human rights performance (migration

⁴ Country average across countries, including Russia

⁵ Media analysis was conducted between April 1st and June 30th, 2015

crisis) – both events, along with debates on an impending Brexit and Grexit, being highly covered in the media.

Despite all data sources emphasising the promotion of certain norms, such as human rights, good governance, democracy and peace, as inherent to the EU’s self-conception and identity, the EU is predominantly not considered as an international norm setter. Only in some areas, such as energy technologies or gay rights, elite interviewees as well as tweeters portray the EU as a norm setter.

Elite interviews point out potentially influential factors in creating, shaping and enhancing perceptions in the local context. Particularly, historical and cultural commonalities entailing common or diverging norms and values are seemingly important impact factors for establishing and nurturing good relations between the EU and its Strategic Partners.

The aggregated analysis (AA) aims to come up with comprehensive findings and identify trends across all ‘building blocks’ of data gathered for the study – the literature review, media and social media analysis, public opinion survey and elite interviews in the 10 Strategic Partner countries. The AA also draws on the in-depth analysis of the 10 Country Chapters (CC, see Chapter 3), outlining commonalities among countries as well as significant outliers. Importantly, both CCs and the AA follow the key elements comprising the research framework (as presented in the Introduction of this Report): a) themes, b) research criteria and c) local conditions (explanatory variables).

2.2 Thematic analysis of perceptions of the EU and Europe

This section shows how the EU and Europe are perceived in terms of visibility, actorness and effectiveness, local resonance and normative power (‘research criteria’) and in promoting its core themes, such as Economy, Trade and Business, Agriculture; Politics and Security; Environment and Energy; Migration, Multiculturalism and Human Rights; Culture, Education and Research, Science and Technology; Social and Development.

2.2.1 Comprehensive overview of research criteria across countries

The following shows how the EU and Europe are seen in terms of visibility, actorness and effectiveness, norm setting and local resonance. The themes are indicated in **bold**.

Table 7. Summary of the research criteria

	Visibility	Actorness/ Effectiveness	Norm-Setter	Local Resonance
Most significant/ visible/ successful policy areas	Economy - Trade - Business (Internal) politics - Brexit, Grexit - Migration	Economy - Most active/ effective BUT weakened by economic and Greek debt crises Politics - Active/ effective to some extent BUT	Internal & external politics - Anti- discrimination - Human rights - Rule of law Environment & energy - Renewable energy	Economy - Trade (FTAs) Culture - Heritage, arts, and lifestyle to luxury goods and clothes Migration (social issues & human rights) - Negative resonance in local context

		weakened by migration crisis, Grexit & Brexit		(allegations of ideological imperialism, cultural ignorance, incoherence between rhetoric and actions)
Most insignificant/ invisible/ unsuccessful policy areas	Education RS&T Intl. development	Intl. development Security (aside from peace-keeping) Social development (ineffective handling of migration crisis)	Education Culture Security Intl. Development	Security Intl. development RS&T Environment
Evaluation across different study blocks	Economy: EU perceived as a very visible and important actor on global scale EU Member States: GER, UK, GR very visible as important actors in crises EU representatives: e.g. Draghi, Mogherini, Juncker very visible as actors in crises	Economy: Effectiveness assessed rather negatively due to Greek debt and economic crises Politics: generally positive but increasingly negative due to migration crisis, Grexit & Brexit	In general, EU is very rarely seen as norm setter Increasingly negative due to handling of migration crisis	EU migration policies & human rights negatively resonate (allegations of neo-imperialist behaviour)
Outlier	Culture: visible but connected to Europe Social Media: EU predominantly framed as political actor	Education: though invisible in media, general public considers EU very effective	Twitter: users portray EU far more as normative actor	Russia: EU security policies are perceived to heavily matter in local context

Visibility

The EU is and remains mostly visible as an economic actor, secondly as a political one in internal affairs, while agriculture plays no longer a major role as compared to findings from previous research. The on-going migration crisis has increased the EU's visibility. Also culture remains highly visible, yet is rather linked to Europe than to the EU. The EU is almost invisible in areas of education, research, science and technology and international development, despite its major investments into these policy fields.

Table 8. Most and least visible themes of media articles covering the EU and Europe

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

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

Across countries, the EU as an **economic actor** is predominantly associated with trade and business, an image further intensified by the economic and sovereign debt crises. The table above shows that in media, economy is featured most prominently, but closely followed by politics. Only social media – analysed during Europe Day, G7 and the EU summit as selected major political events – deviate, framing the EU in political and socio-cultural dimensions. Further very visible areas are ‘culture’ (yet more linked to Europe than to the EU) and ‘migration’ with the on-going migration crisis making headlines worldwide. EU visibility in agriculture has notably decreased over time even in agriculture-focused countries such as Brazil, Canada and India. The EU is almost invisible in areas such as research, science and technology, environment and energy, education and development, particular in media coverage.

Actorness and effectiveness

The perception of the EU’s actorness and effectiveness remains ambivalent, especially in the area of economy and politics: the EU is perceived most active and effective in the economic area while concurrently the handling of the economic and Greek crisis taint this assessment negatively. Similarly, the positive assessment of its political actorness is overshadowed by the effects of the migration crisis and the uncertainties of Grexit / Brexit. The areas of security, social development, energy and environment are not featured prominently in media, but the EU is seen as an active and effective entity.

The public opinion reveals a generally positive evaluation of the EU across the SP countries (see figure below). Media covers the EU’s effectiveness in the **economic** sphere rather negatively due to the in- and external damages caused by the economic crisis. Elites in the study’s non-representative interview sample hint to a slightly more positive assessment of the EU’s capabilities as a trade partner. Overall, reporting on the Union’s **political** actorness and effectiveness draws a more positive picture, but is increasingly over-shadowed by the effects of the migration crisis as well as the impending Grexit and Brexit. The EU’s handling of the migration crisis is significantly more negatively assessed than the EU’s performance in various other fields: protecting the environment, combating climate change or promoting global peace and stability.

Figure 1. The general view of the EU in various SP countries



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

In other themes, such as **security** – particularly, peace-keeping operations – **social development**, and **environment** and **energy**, the EU is considered as an active and effective entity in spite of its generally low visibility the media. There, particularly the EU’s active role in the Iran negotiations as well as in the Ukraine’s conflict draws attention. Russia constitutes an exception: the EU is not seen to be an effective actor.

Although less visible, the EU’s internal social development is assessed predominantly positively. **Educational** matters present a positive deviation: the EU is almost invisible in the media, but general publics across Strategic Partner countries perceive the EU’s activities as overwhelmingly strong and positive.

Norm setting

The majority of analysed data and key audiences are sceptical about the image of the EU as a norm setting entity across all thematic areas, with some specific exceptions in sustainable development, gay rights and renewable energy as highlighted by elite interviewees. With the emergence of the migration crisis, the EU is seen to act against its own standards.

The rare reports covering the EU’s role as a norm setting entity across all countries relate the EU to certain norms, most visibly with anti-discrimination (particularly gay rights), good governance, democracy and rule of law. Twitter users as well as the selected elite interviewees confirm this, adding sustainable development. More cooperation is of interest, but elites express doubts of the applicability of EU norms in their respective local contexts.

In reports on the **migration** crisis, the EU is seen as acting in contradiction to its own human rights standards and self-proclaimed core values. The EU is not seen as a norms setter in

either **education** or **culture**. Only in the area of **environment**, in particular renewable energy, the EU is sometimes considered a norm setter.

Local resonance

Local resonance seems to heavily impact the frequency and fashion a topic is covered and perceived; trade partnerships and the negotiation of Foreign Trade Agreements (FTAs), cultural programmes and educational exchanges resonate well with local audiences, while the vast majority of EU's policies are widely unknown, for example in the area of security or international development. Social issues, migration and human rights can even resonate negatively, if connected to ideological imperialism.

Trade partnerships or FTA negotiations (e.g. Canada, South Korea, India, Japan) as well as frequent high-level visits (e.g. China) have a seemingly positive impact on the assessment of the EU. In other countries (e.g. Brazil) where this local hook is missing, visibility of the EU and the perception of its actorness is lower.

In contrast, EU policies in areas such as **security** or **international development** do not resonate well or visibly with local audiences. One exception are countries that have interest for the EU to become a counterweight to other powers in their region, e.g. Japan (with regard to China) or Mexico (with regard to the US). Another exception is Russia: the EU's security-related activities, specifically the EU's sanctions against Russia, are very pronounced in the local context.

A group of topics consisting of **social issues**, **migration** and **human rights** seem to negatively resonate in the local context due to allegations of ideological imperialism, ignorance towards diverging cultural norms and values or inflexibility when trying to apply standards to other national contexts.

In a number of **cultural** sub-themes – ranging from heritage, arts, and lifestyle to luxury goods and clothes – European values and images are appealing across countries, while cinema and theatre, music, sports, food and cuisine are seen as slightly less appealing, though generally still very positive.

2.2.2 Thematic overview

*Under this section, the core EU themes identified are evaluated across building blocks along the research criteria, indicating the respective research criteria in **bold** within each paragraph. The following table provides an overview of the themes.*

Table 9. Overview of the themes and research criteria

	Visibility	Actorness/ Effectiveness	Norm-Setter	Local Resonance
Economy	Most visible	Most active/ effective but weakened by economic and Greek debt crises	EU generally not perceived as a norm setter	High – in particular with on-going FTA negotiations and established trade partnerships

Politics & Security	Politics: Highly visible Security: rather invisible	Politics: Relatively effective (though weakened by Grexit, Brexit and migration crisis) Security: EU assessed as important for global peace and security BUT generally not considered as an active/ effective security actor	Very rarely seen as norm setter (except Twitter users)	Limited local resonance (except Russia)
Development	Social/ internal: relatively visible International: fairly invisible	Social/ internal: effective in setting social standards, securing general welfare International: EU lags behind other actors (USA, UN)	Social/ internal: norm setter as regards social standards BUT accused of failing its own values in migration crisis International: very rarely portrayed as norm setter	Very limited resonance with local context
Migration, multiculturalism and human rights	Highly visible	EU assessed as ineffective and inconsistent, acting against own standards	EU described as failing its own norms	Negative but fairly high local resonance
Normative	Highly visible in literature Fairly invisible in perceptions	Fairly active/ effective as regards human rights in general Fairly ineffective as regards handling of migrants	Rarely described as norm setter, portrayed to 'over-promise' and 'under-deliver'	Very limited local resonance
Environment and energy	Environment: Limited visibility Energy: fairly invisible	Active/ effective in protecting environment & saving climate To a lesser extent: effective in the promotion of renewable energy	Very rarely described as norm setter (except elites)	Very limited local resonance (except Russia)
Research, science and technology	Fairly invisible	Active/ effective (general public, elites)	EU not described as norm setter	Almost no local resonance/ knowledge of specific EU projects
Culture	Highly visible BUT associated with Europe not EU	Europe is considered active/ effective in producing quality entertainment	Neither EU nor Europe are described a norm setters	Resonating with local contexts. In particular: historical heritage, arts, lifestyle, luxury goods and clothes
Education	Almost invisible	EU's educational programmes are described as active/	EU not seen as norm setter	Resonates with local contexts to limited extent

		effective (despite lacking knowledge among general publics); EU is considered an important partner		
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Economy, trade and business, agriculture

Economy

*Economy is and remains the most **visible** theme across all building blocks (except social media), and moreover the field in which the EU is seen as most **active** and **effective**. An exception is Russia, where politics plays a more important role than economics. The economic and sovereign debt crises have been triggering doubts on the prevalence of the economic strength of the EU, while Europe is seen more disconnected from the crisis. Still, the EU is seen as an important actor and a desirable partner.*

The EU as a predominantly economic actor has been visible in literature the past ten years and remains dominant today. The economic and sovereign debt crises have further increased the visibility of the EU as an economic actor.

The analysis⁶ of business papers across Strategic Partner countries confirms the impression of the EU being first and foremost **visible** as an economic actor. Popular papers draw a more nuanced picture: while papers from four countries frame the EU predominantly as an economic actor (Brazil, Canada, South Africa and South Korea), popular media in five countries mainly use political frames (China, India, Japan, Mexico and the USA). Russian popular papers portray both dimensions to a similar extent.

The general publics present a less nuanced picture: the EU is predominantly seen as an economic actor, associating economy and politics specifically with the EU and not Europe, considering especially tourism and global trade to be important. India is an outlier here, with no differentiation between the EU and Europe throughout different themes. Russia shows another nuance: politics trumps the relevance of economy in importance due to current political events.

In social media, the portrayal of the EU as an economic or political actor depends on the context as well as on the individual tweeting. Events analysed for the social media analysis at hand (G7 and EU Summit) are first and foremost political events. Economy is the second most visible frame, especially when analysing the tweets from EU officials. Following this logic, a more economic-focussed event would reinforce the EU's visibility as an economic actor in social media.

The Euro is the item that publics across countries name as the most **visible** one describing the EU: 59 per cent of all survey participants have seen, heard or read about it, with the European Central Bank (ECB) being the most or second most visible European institution.

⁶ The finding has to be assessed while having in mind that the papers selected for the media analysis include one business paper in each country, where a high volume of articles on economic topics is to be expected.

The high media visibility of ECB president Mario Draghi across countries underpins this observation.

The increased media reporting on the EU after the beginning of the economic and sovereign debt crises has also changed the perceptions of the EU as a present and effective actor, evoking doubts on the ability of the EU to solve the crisis without causing major damage. This political frame also leads to a rather negative reporting on the EU in economic contexts. In comparison, the **economic effectiveness of Europe** is perceived in a much more positive light, as it is disconnected from the crises of the EU.

Respondents of the public opinion survey and elites see the EU in a more positive light than the journalists: across all countries they view the EU as an important actor and main economic partner for their respective countries, with the exception of China. In certain regards, elite interviewees consider the EU to be more **effective** than its Member States, for example in international trade negotiations (Japan) or bilateral agreements (Comprehensive Economic and Trade Agreement (CETA), Canada). At the same time, concerns regarding the future of the economic power of the EU due to the financial crisis are raised in all countries, as summarised by a Chinese policymaker from the Ministry of Foreign Affairs: ‘The Euro debt crisis has led many people to worry about the future of the Euro, even of the EU as a whole.’

Despite its high visibility and evaluation as an effective actor, the EU is **not assessed as a norm setter** in the area of economy.

Trade and business

Trade and business are highly relevant for the partner countries when referring to the EU, who have an overall positive view of the performance of the EU. Contrastingly, in media, the EU is often negatively connected to the economic and sovereign debt crises. Europe, to the contrary, is assessed much more positively. Perceptions differ greatly across different countries.

With the economic and sovereign debt crises, trade issues have become ever more visible in news reporting on the EU in past years.

For more than half of the countries (US, Brazil, Mexico, Canada, China and South Africa), trade is the second **most visible topic** after economy as such. For Korea, Japan and India, the performance of the EU in business and trade is the second most visible. Russia is again the exception: visibility of the internal performance of the EU is low, while EU trade and sanctions have the highest visibility in the current political climate. While the EU is generally seen as an important economic actor across all countries, the association with ‘Europe’ draws a more diverse picture: business and finance is most visible, followed closely by trade, industry and infrastructure.

Media coverage of the EU is mainly connected to the internal crisis of the EU and its Member States. Those reports have a tendency to be more negative, while articles on Europe, portraying the relations with the respective partner countries and European countries, have a much more positive connotation and connect better with local contexts. The general public and the elites do not make this distinction and view not Europe, but the EU as an important trading partner across all countries and as well as an **effective partner** performing well in global trade (see Table 10).

There are a few country-specific nuances: in China and Russia, the EU is seen to perform particularly well in financial service and banking compared to the ranking in other countries, and a high share of population in Russia (46.7 per cent, only exceeded by Mexico with 47.3 per cent) is even asking for stronger trade relations with the EU. The view of the EU's effectiveness in international trade negotiations is for example affirmed by the interviews with Japanese elites, who emphasise the coherence of EU actions.

Table 10. The EU's performance in global trade

Responses from:	Very good	Fairly good	Neither good nor bad	Fairly bad	Very bad	Do not know	Total responses (N)
All countries, average	27,0%	39,5%	18,0%	3,3%	1,0%	11,3%	11621
USA	18,5%	32,4%	20,7%	3,9%	1,0%	23,6%	1007
Canada	17,0%	39,0%	17,1%	2,8%	0,9%	23,1%	1022
Russia	26,7%	40,2%	15,0%	7,0%	3,4%	7,7%	1321
Japan	9,0%	37,4%	25,1%	2,8%	0,9%	24,8%	1024
China	32,8%	46,2%	15,6%	1,8%	0,4%	3,2%	1410
Brazil	40,4%	36,0%	11,9%	2,4%	0,6%	8,8%	1210
Mexico	40,1%	39,6%	13,7%	2,0%	0,3%	4,5%	1164
S. Korea	10,3%	40,0%	33,8%	5,6%	1,0%	9,4%	1238
S. Africa	36,1%	37,3%	13,3%	2,0%	0,7%	10,6%	1169
India	34,5%	44,5%	15,0%	1,9%	0,6%	3,6%	1056

Based on the survey Q13: How well do you think the European Union performs in each of the following fields: [...] global trade.

In countries that are currently or prospectively negotiating a FTA with the EU (e.g. Canada, the USA, India), **trade related issues resonate well** and the progress of the agreement or the negotiation is frequently mentioned: in Canada, the effort of the EU to include the provinces in the CETA negotiations is positively evaluated. A policy-maker stated: 'we want this agreement to be comprehensive, we want provinces at the table.' In India, there are expectations that FTA negotiations might resume in the near future. Interviewees from the USA consider the Transatlantic Trade and Investment Partnership (TTIP) an important development in the relations with the EU.

Agriculture

The former relevance of agriculture continues to decline and has lost its dominance observed in the literature review as a topic to current political and economic developments and events.

In the literature analysis, agriculture played a more pronounced role in the relations of the EU with its partner countries and was in some cases (Brazil, Canada, India) one of the most visible themes. The EU policies were mainly seen negatively and as a mean of the EU to exert self-interested influence.

In the current analysis, **the visibility and relevance** of topics related to agriculture have declined to almost invisibility, even though the general public evaluated the EU to be performing quite well in the area of agriculture. In both media and the interviews, agriculture was mentioned only once in Brazil in a negative context. A policy-maker states: '[...] in the final negotiation, the Europeans placed quotas on certain agricultural products that were smaller than what Brazil was already selling.'

Politics and security

The EU is perceived as a visible and largely effective actor in internal political matters (even though weakened by the uncertainties of Brexit and Grexit), but they are rarely connected to the local contexts in the Strategic Partner countries. Still, the Member States are considered more important and more coherent political actors than the EU. In security matters, the EU has low visibility but is considered an effective actor in selected fields, such as peace-keeping.

Politics

Internal politics and the bilateral relations with the SPs are the second-most prominent policy field where the EU is most visible and is generally evaluated positively and as an effective partner across all 10 countries. The uncertainties due to a dawning Grexit / Brexit weaken this image. Only in Russia, discussion of the EU as a political actor dominate. Still, the Member States, especially the biggest ones and their respective leaders are considered more important.

For the past decade, visibility of the EU as a political actor has been ambivalent. Countries like Japan and China see the EU increasingly as a political power; India still does not perceive the EU as a politically strong actor (see Literature Review for more details).

Across all countries, politics is associated with the EU (not Europe). An exception is Russia, where the public and elites consider the political theme to be more important than the economic one.

The non-representative elite interviews reveal across countries a rather low visibility of the EU as a political actor outside its borders. As a Russian professor underlines: '[...] the EU is important for Europe itself.' In media, the ECB is the most visible institution in the majority of countries while the European Commission is most visible in India, Russia and China. Next to the high visibility of ECB president Mario Draghi, political leaders of the EU, Jean-Claude Juncker and Federica Mogherini, receive high visibility (though still moderate compared to the visibility of Member States leaders). While Juncker is visible across different topics, Mogherini is most visible in connection with the migration crisis in the Mediterranean. Compared to the visibility of institutions and leaders of the Member States acting within an EU context, visibility of the EU and its officials remains comparatively low. The largest three Member States Germany, France and the UK together with Greece, and their respective leaders draw most attention in the media, while smaller states are only marginally visible.

In all partner countries the EU is predominantly seen as an **effective political actor** and partner. With the exception of Russia, all countries view the EU in a positive light, also in comparison with other countries and even more so compared to other institutions (the EU is only surpassed by the UN, or in India, the World Bank). But this positive evaluation of the partnership with the EU does not translate into increased visibility compared to other countries: the EU is usually similarly or less visible. In comparison with other international institutions the EU is more visible than most, surpassed only by the UN. The rather positive evaluation of the public is not mirrored in social media: tweets during the EU Summit mention the danger of Grexit, Brexit and the Russian threat/ treatment of Russia frequently, mainly in a neutral or negative way. Channels related to the EU (institutions and leaders on EU level) counteract this reporting with positive tweets.

The elite's perspectives vary: a Japanese interviewee, for example, sees the unity of the EU increasing under the influence of the crisis due to its common normative foundation. Many

other experts regard the EU as an active, but often incoherent and fragmented, sometimes even ineffective (e.g. India) political actor. The issue of coherence and effectiveness of the EU is also a topic in social media. The tweets during the G7 Summit identify the EU as a political and sociocultural actor, and mention a broad range of EU institutions and officials in tweets and re-tweets. This results in a higher visibility for the EU compared to the EU Summit, where EU institutions and officials were the main authors of tweets, but their tweets were less re-tweeted. As a consequence the EU is less seen as a coherent actor during the G7, and more so during the EU Summit. This suggests that the EU could make more use of events that can be connected with the EU in various contexts to distribute its messages and gain traction by re-tweeting messages by non-EU tweeters.

In media, the EU as well as Europe **is rarely seen as a norm setter**. Norms are always contextualised within a certain event and usually – but not exclusively, as in the case of human rights and the migration crisis – framed in a positive light across countries. The usage of EU and Europe is ambivalent. EU-reportage did not feature normative frames in the USA and China, while the Europe reportage did not feature normative frames in the USA, Canada and India. Norms the EU and Europe are associated with the most on the eyes of media include good governance, democracy, rule of law or anti-discrimination. In social media, norms are commonly connected with the EU's framing as a political actor, which is particularly surfacing during political events. During the EU Summit, the normative frame was second only to the political frame, often connecting norms with EU political actions. Here, the mentioning of human rights ranked highest, followed by good governance and sustainable development. Also in the frame of the G7, norms are mentioned in connection with the political frame. In the interviews, the same norms are connected with the EU, moreover, experts mention European integration as a model for regional integration, but doubt the applicability in their local context (e.g. South Korea, Japan, South Africa). In contrast, critical voices arise stating the EU lost its normative power in the course of the migration crisis.

Security

Visibility of how the EU performs in matters of international peace and security is rather low, even though the EU's role in the Iran negotiations is evaluated positively (by the experts) and 32.95 per cent of survey respondent see the EU as very, 40.3 per cent as somewhat important. EU leadership in world affairs is seen desirable and likely by a majority within the 10 SPs (except Russia) already seeing the EU as an effective actor in peacekeeping and as a slowly emerging security actor.

Previous studies have shown that the EU is generally not perceived as a security actor, and receives higher visibility in the media only when there is a local 'hook' to the reporting.

Our study has shown that **visibility** in the media of the EU as a security actor remains low. The few articles that feature security cover topics on the current global hot spots with relevance to the EU, so mainly Ukraine, Russia and Iran. In social media, security is hardly mentioned – only during the G7 summit in connection with Syria.

Despite low visibility the EU's role in Iran is assessed positively by the general public and elite interviewees, framing the EU as an **effective key player**. The EU's leadership in world affairs is seen as desirable across all countries (except Russia), also as an effective counterweight to other powers in the respective regions, as well as likely. Russia and India

again present exceptions to this observation. In terms of its **effectiveness**, the EU is generally evaluated as important in global peace and stability (see Table 11), only lagging behind the US and the UN. The EU is considered particularly effective in peacekeeping missions, less so in military operations or the fight against terrorism.

Table 11. The EU's role in maintaining global peace and stability

Responses from:	Very important	Somewhat important	Not very important	Not at all important	Do not know/cannot answer	Total responses (N)
(all countries)	32,9%	40,3%	13,7%	3,9%	9,2%	11621
USA	34,6%	32,3%	11,2%	2,9%	19,1%	1007
Canada	34,2%	37,2%	7,8%	2,5%	18,2%	1022
Russia	17,3%	35,6%	24,4%	15,4%	7,3%	1321
Japan	21,5%	44,0%	12,5%	2,1%	19,9%	1024
China	31,8%	53,0%	11,8%	1,1%	2,3%	1410
Brazil	40,8%	36,7%	12,3%	3,0%	7,3%	1210
Mexico	43,9%	36,9%	12,4%	2,3%	4,5%	1164
S. Korea	29,8%	48,7%	13,4%	2,0%	6,1%	1238
S. Africa	44,0%	35,5%	9,7%	2,9%	8,0%	1169
India	32,6%	39,1%	20,3%	2,8%	5,2%	1056

Based on the survey Q7: In your view, how important a role does the EU play in [...] maintaining global peace and stability?

In terms of benchmarking EU Public Diplomacy activities towards other core actors in this study, security – and particularly hard security – cannot be discussed in Europe without reference to **NATO**, historically a key security alliance for Europeans and the transatlantic relationship. NATO as linked to the EU⁷ is however almost invisible, apart from Russia, where media report on NATO with connection to the EU to a limited extent, and the USA, where NATO and the EU/ Europe are mostly mentioned in the frame of American foreign policy-making.

In this regard, the public opinion survey does offer an interesting insight into the perceptions of NATO (studied to offset the perceptions of the EU, not on its own). A majority of survey respondents and elite interviewees have a neutral or no view on NATO (e.g. Brazil, Japan, Mexico, and South Korea), with the exception of NATO members Canada and the USA, who display a more positive view and interviewees stressing the importance of a strong NATO alliance. In the USA and South Africa, interviewees point out that in the context of security, Europe/ EU is almost always associated with NATO as a partner in combating international security threats – in the words of a US interviewee: ‘the US views Europe specifically because of NATO and not the EU as a whole as a security partner.’

Almost all publics consider NATO to play an important role in maintaining global peace and stability (exceptions: Brazil and India). Russia presents the expectable exception: NATO is seen as predominantly negative (the EU is second to NATO in most negative perceptions), and assigned with mixed importance. A Russian interviewee even stresses that ‘we consider

⁷ With the study's focus on the EU and Europe, the analysis did not include NATO's images per se, but covered NATO only when mentioned in connection with EU/ Europe.

the NATO as the main enemy and aggressor', while other interviewees – e.g. from China – point out that NATO primarily serves the US' interests.

Development (social internal and international)

In development, the internal dimension such as developing a certain living standard across EU Member States is far more visible than the EU's involvement in international development despite being the world's biggest ODA donor. Nevertheless, the EU is seen as effective in both areas: in setting social standard internally and in development policies.

Development: social internal

The EU's social actions are the third most visible theme in media/ social media, where the EU as well as Europe is considered as an actor. The EU is viewed as a region of high social development and providing high living standards as well as effective in social justice tolerant towards diversity and multiculturalism; the migrant crisis evokes negative reactions that have the potential to tarnish the EU image in the mid to longer term.

In contrast to previous studies, visibility of social actions of the EU are now the **third most visible theme** after economy and politics across all countries. The EU is considered a region of high social development and standards as well as having a high level of education, and in Japan and South Korea, especially as providing equality between men and women. In social media, the EU Summit – visible also as a sociocultural event – follows behind the political frame but is covered on the same level as the economic frame.

In mass and social media, the EU and not Europe is presented as an actor in the social sphere in a mainly positive light. The EU is seen to possess an advanced social legislation and it is tolerant towards diversity and multiculturalism, and performing well in providing social justice and solidarity (see Table 12), as well as providing a high quality of life to its citizens. Some of those evaluations are challenged in the context of Europe. However, media in seven countries (Brazil, USA, Mexico, Russia, South Korea, Japan and India) assess the treatment and handling of the increasing number of migrants negatively.

Table 12. The EU's performance in social justice and solidarity (social rights, public welfare system)

Responses from:	Very good	Fairly good	Neither good nor bad	Fairly bad	Very bad	Do not know/ cannot answer	Total responses (N)
(all countries)	20,1%	37,3%	23,1%	5,2%	2,1%	12,2%	11621
USA	16,8%	27,0%	23,1%	5,6%	2,6%	24,9%	1007
Canada	11,6%	34,1%	20,7%	6,5%	1,3%	26,0%	1022
Russia	12,3%	30,2%	26,7%	12,4%	6,8%	11,5%	1321
Japan	9,6%	32,9%	31,3%	3,6%	1,1%	21,5%	1024
China	30,2%	46,9%	17,7%	2,2%	0,4%	2,6%	1410
Brazil	29,0%	36,7%	19,9%	3,8%	1,3%	9,3%	1210
Mexico	24,5%	43,3%	21,3%	2,9%	1,4%	6,6%	1164
S. Korea	12,9%	40,3%	31,5%	4,9%	0,8%	9,5%	1238
S. Africa	21,6%	39,9%	21,2%	3,6%	2,1%	11,7%	1169
India	29,3%	38,6%	17,9%	6,2%	3,5%	4,5%	1056

Based on the survey Q17: Generally speaking, how well do you think the European Union performs in [...] social justice and solidarity (social rights, public welfare system)?

Interviewees across all countries confirm the view of the EU as a socially progressive actor, but also criticise the violation of its own standards in the light of the migration crisis. One Brazilian NGO director states: ‘the EU propagates norms that bureaucratize social action and activism. But about values, I would say that up until the 2000s, Europe had transmitted the idea that solidarity was possible, that another world was possible. But then it got lost and the crisis buried it once and for all.’

Development: international

Visibility in media remains low in the area of international development, but general public and elites across countries consider the EU (Europe is not mentioned in this context) to be an active and mostly effective actor. However, other actors (mainly the USA and UN) are regarded as equally or even more relevant.

Previous research has shown that in general, the EU’s development policy (Millennium Development Goals (MDGs), aid, debt relief and poverty reduction) has a low level of media coverage. Also the overall public awareness of the EU as a relevant actor in the area of development policy is minimal, even in countries that receive a large share of development aid (e.g. South Africa). In some countries though (e.g. South Korea), elites as well as the general public consider the EU as a major long-term provider and development partner.

The 2015 analysis confirms the **low visibility** of the EU in the international; development frame. Except for reports on the EU’s help in Nepal, media is disinterested in this field.

Despite its low visibility in media, tweets during the EU Summit mention the EU as an **effective development actor**, for example when providing assistance to African countries. The general public and elites considers the EU a well performing actor in this area, even though lagging behind the USA (exceptions: Brazil, Mexico and especially Russia) and/ or the UN, while surpassing the World Bank and other countries. Except for Canadian and Chinese interviewees, all other interviewees describe the EU as a relevant and effective, although hardly ever visible actor. In the case of the US, interviewees mainly mention the EU as an important partner for cooperation in providing development aid. Mexican interviewees highlight their interest in more cooperation, for example for developing democratic structures in Mexico.

Migration, multiculturalism and human rights

The visibility of migration related themes has increased drastically during the course of this study. Evaluations of both the EU’s and Europe’s actions in migration policies are largely negative and assessed as contradicting to the EU’s own norms, even though the fact that the EU as an institution responds to the crisis are seen positively.

The **visibility** of the issue of migration has increased sharply in media across all SP countries. In Brazil, it is even the most visible topic after economy. Also in social media, migration is a highly visible topic.

Media evaluates the EU’s role **as an actor** responding to the crisis as an institution and not just through individual countries’ actions as largely positive. It is noteworthy that during the course of the analysed time frame, the evaluation of concrete solutions and the way the EU is handling the crisis in media has become increasingly negative. The general publics across

countries respond clearly negatively to the EU's handling of the crisis. Also the EU's performance in integrating migrants is evaluated as dismal (exception: Japan).

The EU is explicitly **not seen as a norm setter** but rather as not living up to its own standards and betraying its own norms. One policy-maker from Brazil stated that the migration crisis harms the normative power and the EU is seen as sweeping the discussion 'under the rug'; an interviewee from Japan saw the handling of the migrant crisis as going against European values.

Normative actor

The EU/ Europe are seen to be active defenders and promoters of human rights, but not always perceived in a positive light.

Previous research has shown that human rights are one of the areas in which the EU is considered a leader. This role is mostly positively assessed but received also negative attention, as some countries (e.g. South Africa) view the EU as imposing their norms on them.

The **visibility** of the EU as well as Europe as a normative actor is low. If mentioned in the media, reporting covers human rights, anti-discrimination, good governance, democracy, the rule of law, and sustainable development. Associations with the EU or Europe vary across countries. Press in the USA and India do not link the concept 'Europe' to core normative concepts, while the other eight SP countries assign a range of norms and values to Europe. Human rights receive a major share of attention in the media, followed by good governance, sustainable development and, to a much lesser extent, social solidarity, democracy, rule of law and liberty (Table 13).

Table 13. Normative framing of the EU in media across ten countries

	USA	Canada	Brazil	Mexico	Russia	China	SA	SK	Japan	India
Democracy			X			X				
Human rights		X		X	X	X	X	X	X	X
Peace							X	X		X
Rule of law								X	X	
Good governance				X			X	X		
Social solidarity										
Antidiscrimination										
Sustainable development								X	X	
Liberty										X
Food standards						X				

Based on normative framing of EU news in media analysis across the 10 SP countries

Media, interviewees and the general publics (except Russia) evaluate the EU's normative identity in a positive light, especially in the area of democracy, protection of human rights (Table 14) and good governance, as well as the EU's performance in successful gender equality. Interviewees mention EU frequently as an active promoter of or even as 'a pioneer in [...] human rights' (Mexican civil society representative), securing welfare and a high standard of living within Europe, but also being an effective promoter of human rights abroad. Many attach local concerns that they wish to be promoted more, for example fight against slavery in Brazil, or promotion of women's rights in India.

Table 14. The EU's role in promoting and defending human rights worldwide to protect human dignity, freedom, equality and solidarity

Responses from:	Very important	Somewhat important	Not very important	Not at all important	Do not know/cannot answer	Total responses (N)
(all countries)	34,4%	37,4%	13,2%	4,2%	10,9%	11621
USA	34,1%	31,3%	10,8%	4,5%	19,4%	1007
Canada	35,5%	35,6%	6,6%	3,0%	19,3%	1022
Russia	15,5%	35,0%	23,3%	13,6%	12,5%	1321
Japan	21,7%	38,7%	14,1%	1,8%	23,8%	1024
China	38,7%	46,9%	10,3%	1,9%	2,2%	1410
Brazil	39,3%	35,6%	12,5%	4,2%	8,3%	1210
Mexico	43,1%	34,4%	13,0%	4,3%	5,2%	1164
S. Korea	34,8%	42,6%	12,2%	2,3%	8,0%	1238
S. Africa	46,1%	33,2%	7,9%	3,0%	9,8%	1169
India	34,8%	37,6%	20,0%	2,4%	5,3%	1056

Based on the survey Q10: In your view, how important a role does the EU play in promoting and defending human rights worldwide to protect human dignity, freedom, equality and solidarity?

In terms of **norm setting**, the picture is contradictory. While reactions of the EU in the migration crisis are assessed as negative, media is enthusiastic about the establishment of other norms, such as the promotion of gay rights in Europe. The interviewees confirm that the EU is seen as a norm setter and the origin of many international norms. Elites see the EU as norm setter in the area of environment, especially in Asia.

Previous concerns of different countries that the EU did **not respond to local contexts** are reiterated. For example, a South African interviewee voices the concern of ideological imperialism, while a Japanese interviewee mentions that the attempt to abolish the death penalty in Japan did not resonate with the local context. Meanwhile, a Canadian interviewee confirms normative closeness between the EU and Canada.

Environment and energy

The EU is more visible in the area of environment (especially regarding fighting climate change) than in energy. The EU as well as Europe are considered as active and effective in protecting the environment and saving the climate, elites even consider the EU a norm setter.

Environment

In environment, the EU is seen as an active and effective leader that is setting norms in environmental protection and the fight against climate change. However, visibility remains low. European societies are considered to actively protecting the environment, but not standing out particularly compared to other societies.

Reviewed literature has shown that the EU's role in promoting environmental policies and protection is not highly visible in media, but is positively perceived by elites. In climate change negotiations, the EU is seen as a leading actor, even though media abroad rarely reports on the EU's role in the negotiations.

The **limited visibility** in media continues (an exception is the Chinese business paper where environment is the second most visible theme), even though in social media (tweets with regard to G7 summit) climate change and the environment are common topics.

Reports on the **EU's environmental actions** cover almost exclusively the topic in the context of climate change debates, such as the reduction of carbon emission and the COP21 summit in Paris. Media reports on the environmental agenda of Europe are equally rare, but have a positive connotation, as Europeans are portrayed as active climate savers and protectors of the environment. The general public and elites evaluate the EU's role in climate change mitigation and protecting the environment as very important across countries, with the exception of Russia (see Table 15). Still, other actors are evaluated as more active and have taken over the EU's previous stand as a leader in climate change negotiations, mostly the US and/ or the UN. Elites assess the actions of the EU in environmental policies as positive and effective, but not always implementable in the local context (e.g. in Canada, as the then Canadian government had no interest in cooperation in this topic).

Table 15. The EU's role in fighting global climate change and protecting the environment

Responses from:	Very important	Somewhat important	Not very important	Not at all important	Do not know/ cannot answer	Total responses (N)
(all countries)	33,6%	37,5%	13,6%	3,6%	11,6%	11621
USA	33,8%	28,5%	10,5%	5,8%	21,4%	1007
Canada	36,4%	30,7%	7,9%	3,5%	21,4%	1022
Russia	15,3%	40,0%	21,7%	7,9%	15,1%	1321
Japan	20,2%	40,8%	13,9%	2,6%	22,5%	1024
China	39,4%	46,5%	9,9%	1,3%	3,0%	1410
Brazil	37,7%	35,3%	13,6%	5,6%	7,7%	1210
Mexico	42,4%	35,6%	13,7%	3,3%	5,0%	1164
S. Korea	31,3%	45,3%	12,9%	1,9%	8,6%	1238
S. Africa	45,0%	31,8%	10,8%	2,3%	10,2%	1169
India	34,8%	36,5%	20,7%	1,9%	6,1%	1056

Based on the survey Q8: In your view, how important a role does the EU play in fighting global climate change and protecting the environment?

The positive evaluation of the EU's role in environmental protection and the fight against climate change leads in the eyes of the elite to **the acceptance of the EU as a norm setter**. Especially Asian countries (China, India and Japan) acknowledge the role of the EU as a norm setter and a reference point, but also expect the EU to be more active (India) or realise that standards are **not applicable in the local context** (China). Several interviewees across countries emphasise the role of the EU as a norm setter: as stated by Russian business representative: 'I think, it's the [environmental] sphere, where the Europeans achieved a higher level understanding the necessity to protect environment, that resources are limited and the nature should be preserved, bringing up a new generations of Europeans – that's what we need to learn from them.' Also Japanese interviewees – supported by those from South Korea, US and Canada – confirm the EU's role as a norm setter.

Energy

Energy receives very low attention in relation to both the EU and Europe, but is – whenever mentioned – mostly positively framed. Elites consider the EU to be an important partner and even a norm setter when it comes to renewable or clean energy.

Similar to the limited reporting on environment, the EU's actions in the field of energy received little attention in literature. The EU's effectiveness and cohesion as well as a lack of clear messages were evaluated rather negatively.

Current media reports show that the **visibility** of the EU and Europe in energy remains low. An exception is Russia. Here, reports on the EU's actions, especially in connection with Russian gas, are frequent and rather negative. In social media the field of energy did not receive tangible attention. However, more energy- or environment-oriented events (e.g. COP21 in Paris or EU Sustainable Energy Week) would bring these frames into the limelight.

The main topics receiving attention in the media are the EU's actions in the development of renewable energies. A majority of interviewees saw the role of the EU in their country as quite relevant as 'the ratio of renewable energies is very high' (Chinese civil society representative) (China, Mexico, Russia, South Africa and Japan) or as somewhat relevant (Brazil, Canada, India, South Korea and USA). Interviewees across different countries voiced their interest in receiving renewable energy technology from the EU (e.g. South Africa and China).

The role of the **EU as a norm setter** is only mentioned in interviews. One interviewee from Japan described the EU as a norm setter in clean energy; an interviewee from the US considered the EU to be a role model in the promotion of renewable energy.

Research, science and technology

Visibility of the thematic area research, science and technology is especially low in media: for example, Horizon2020 received almost no coverage, while advanced technologies receive attention in some countries. On the contrary, elites and the general public consider Europe (rather than the EU) as quite relevant actor and partner in these areas, even though their role is contested. Still, EU projects resonate well in the local context of the partner countries.

Research, science and technology (RS&T) area has not yet been part of preceding research featured in the literature review. It is almost invisible across countries, but has been mentioned and assessed positively on the margins in East Asia and South Asia.

Very few media articles mentioned EU initiatives, e.g. Horizon 2020. Europe receives slightly more attention than the EU in RS&T but not in all countries. In Russia, China, South Africa, South Korea, India and Japan, advanced technologies from Europe are noticed and across all countries, science is foremost connected with Europe rather than EU (exception: India). Big European research projects like the European Organization for Nuclear Research (CERN) also get featured in the media.

Despite the low visibility, the EU is seen as a **relevant actor**. Elites in Canada, China, India and South Korea regard EU's role in RS&T as quite important. Many interviewees mention the interest in increasing cooperation and ask for a more active promotion of innovation and technology (e.g. India and South Korea). General public confirms the importance of the EU as an actor in innovation and technology: most respondents agree that the EU is important for advancing innovation and technological progress (see Table 16) and performs well in various fields of technology, but it is not a leading figure compared to other actors. Most respondents see the EU lagging behind the USA, China and Japan (exception: South Korea).

Table 16. The EU's importance for advancing innovation and technological progress in the world

Responses from:	Very important	Somewhat important	Not very important	Not at all important	Do not know/cannot answer	Total responses (N)
(all countries)	34,3%	39,3%	14,1%	2,6%	9,6%	11621
USA	28,8%	32,9%	14,8%	4,0%	19,6%	1007
Canada	28,5%	36,2%	15,1%	2,3%	17,9%	1022
Russia	21,6%	43,5%	20,5%	5,5%	8,9%	1321
Japan	18,8%	42,7%	14,7%	1,2%	22,7%	1024
China	43,3%	44,7%	8,0%	1,8%	2,1%	1410
Brazil	46,9%	33,9%	11,5%	1,6%	6,1%	1210
Mexico	46,4%	35,6%	13,1%	1,1%	3,8%	1164
S. Korea	31,2%	45,4%	13,6%	2,5%	7,4%	1238
S. Africa	37,9%	35,6%	14,5%	3,8%	8,2%	1169
India	36,3%	40,2%	16,8%	1,9%	4,8%	1056

Based on the survey Q11: In your view, how important are the following countries and organisations in advancing innovation and technological progress in the world?

The EU is **not seen as a norm setter** in the field of RS&T; only one interviewee from India evaluates the EU as a superior model and a norm setter in international knowledge and research exchange.

Other interviewees notice some EU projects resonating well in their countries. A Canadian interviewee mentioned Canadian participation in the CERN project. A Chinese interviewee confirmed the local interest in technology transfer to China.

Culture

Culture is highly visible whenever associated with the concept of Europe (not the EU), and often connected to individual Member States. The EU is regarded to be an attractive actor that promotes culture effectively and resonates in many facets with local audiences. Nevertheless, some actors see the EU and Europe promoting a civilisational agenda in their cultural relations.

While the role of culture is widely dealt with in existing literature, research on perceptions of cultural activities is to date very limited. The assessment of the EU's actions is ambivalent: EU collaborations are welcome, while some actors accuse the EU and Europe of promoting a civilisational agenda.

Cultural diplomacy is a core part of Public Diplomacy. The emphasis on the role of culture led to the Preparatory Action 'Culture in EU External Relations', a ground-breaking, extensive report on the role of culture in the EU's external outreach. A consortium of eight cultural institutions and organisations worked on the report between 2011 and 2014. In its unprecedented task, it committed itself to facilitating and supporting research on the role of culture in the EU's external relations with its neighbourhood and its Strategic Partners, as well as with its Member States. In its conclusion it affirms that European culture is an influential point of attraction for and in demand of stakeholders across the world, who highly value Europe's cultural diversity. Hence, a cultural relations strategy with clear goals and priorities, while concurrently taking local conditions and concerns of the partner countries into account, is desirable and needed, confirming the results of the study at hand. The main

aim of the Preparatory Action was to adopt a spirit of global cultural citizenship that goes beyond the successful projection of European cultural creativity and diversity, but fosters mutual learning and sharing.

Across all countries, **Europe is much more visible than the EU** in the area of culture (exception: India), and often connected to individual Member States and their activities. Exception are Russia and South Africa. Here, media does not prioritise reporting on the EU's and Europe's cultural profile. Topics of interest include culture, art, lifestyle, classical and modern music, history, museums and exhibitions as well as travel and tourism, and European brands. On Twitter, the Europe Day, framed as a cultural event, is used as an opportunity to distribute messages for entertainment rather than to spread political opinions.

Across all countries, Europe is seen as a producer of popular luxury goods and clothes, as well as an attractive tourist destination; in comparison, Europe is not seen as a producer of music and arts that are popular in their respective countries (exception: India). There is a general support for more cultural engagement with Europe across the SP countries (Table 17).

Interviewees largely confirm the attractiveness of Europe due to its culture, history and lifestyle. One Chinese academic stated that the EU is 'comparatively active with big influence in culture and society areas.' An interviewee from Canada affirmed the particular resonance of French culture with the Quebec region. Interestingly, while the EU and Europe are largely evaluated as positive actors in culture, they are not framed as norm setters.

Table 17. The view of the general public on whether Europe should be engaged more actively in cultural exchanges with the respondent's country?

Responses from:	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Do not know/cannot answer	Total responses (N)
(all countries)	29,5%	40,5%	18,5%	2,7%	1,2%	7,6%	11621
USA	21,1%	30,1%	27,5%	3,5%	1,2%	16,7%	1007
Canada	21,5%	34,7%	24,3%	2,3%	1,1%	16,1%	1022
Russia	32,2%	39,7%	14,0%	4,3%	3,7%	6,1%	1321
Japan	14,6%	39,4%	27,7%	2,3%	0,9%	15,0%	1024
China	36,2%	47,9%	13,7%	0,4%	0,2%	1,6%	1410
Brazil	33,6%	39,5%	17,4%	2,6%	0,7%	6,1%	1210
Mexico	47,0%	37,4%	10,7%	1,3%	0,3%	3,3%	1164
S. Korea	17,8%	50,5%	22,0%	3,3%	0,4%	6,1%	1238
S. Africa	31,7%	38,3%	18,0%	3,3%	1,3%	7,4%	1169
India	34,3%	43,9%	13,8%	4,1%	1,7%	2,2%	1056

Based on survey Q20: Looking from your country's perspective, how strongly do you agree or disagree with the following statement: Europe should be engaged more actively in cultural exchanges with your country

Education

Educational programmes and policies are not very visible: the Erasmus programme is the least visible image connected with EU. Still the EU is evaluated to be an effective actor providing high education standards – internally as well as in educational exchanges with partner countries, which resonate well in the local context. The EU and Europe are not considered to be norm setters in education.

Educational programmes of the EU have the **least visibility** among the images connected with the EU: only 9.5 per cent of survey respondents have definitely heard about the Erasmus programme. Regarding its outreach to students and academics, the EU is currently making a transition from 'EU Centres' to 'Jean Monnet EU Centres' to build one global network of academics and students focusing on EU affairs. This transition is concluded in the USA and Russia, while the other countries will undertake the transition in the near future. Erasmus+ will then be the overarching programme for a variety of exchanges with universities and students up to the master level.

The EU is still seen as **an effective actor** in providing high educational standards for its citizens. In six Strategic Partner countries, the general public even sees education as the area the EU performs best (exceptions: Russia, Japan, South Korea and India). Across all countries (and confirmed by the elite interviews), the EU is considered an important partner for their respective educational exchange programmes (see Table 18).

Table 18. The European Union as an important partner for education exchanges

Responses from:	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Do not know/cannot answer	Total responses (N)
(all countries)	24,3%	39,0%	20,3%	4,5%	2,2%	9,7%	11621
USA	21,4%	29,1%	23,4%	4,4%	1,7%	20,1%	1007
Canada	18,3%	35,5%	19,3%	4,3%	1,4%	21,3%	1022
Russia	17,9%	35,8%	19,2%	10,8%	9,2%	7,0%	1321
Japan	9,0%	37,3%	30,3%	3,4%	1,1%	18,9%	1024
China	29,8%	50,0%	16,5%	1,5%	0,1%	2,1%	1410
Brazil	34,8%	37,8%	16,0%	3,5%	1,1%	6,8%	1210
Mexico	31,4%	38,2%	19,3%	4,6%	1,4%	5,2%	1164
S. Korea	10,8%	48,1%	27,7%	5,1%	0,6%	7,6%	1238
S. Africa	25,7%	35,6%	22,3%	4,7%	2,1%	9,5%	1169
India	43,3%	38,6%	10,1%	1,7%	2,1%	4,2%	1056

Based on survey Q18: Looking from your country's perspective, how strongly do you agree or disagree with the following statement: The European Union is an important partner for your country's education exchanges

The EU and Europe are **not mentioned as norm setters** in the area of education. Only one policy-maker from Brazil described Europe as a model for social welfare, including education: 'I think that the question about the European welfare state is something until today that impresses many people here. [Europe] is always seen as a model of education, health system, social security.'

Still, interest in educational exchanges exist across countries and does **correspond to local contexts**. For example, one Brazilian interviewee mentioned that Brazilian policy-makers discuss the applicability of the Bologna process for future modifications of the Brazilian educational system. Targeted promotion of educational matters could hence increase visibility and lead to more cooperation.

2.3 Explaining the findings: local conditions and the geopolitical context (explanatory variables)

Thematic analysis revealed local resonance impacts the frequency and fashion in which a topic is covered and perceived.

This section identifies general patterns and phenomena of local conditions as well as geopolitical context/ economic interdependence that impact the **perception of the EU and Europe** across analysed countries. It analyses to what extent internal and external local conditions can be generalised globally, and to what extent they have to be clustered region- or country-wise. It encompasses several levels of analysis: on the global level, the geopolitical context and economic (inter)dependence; on a country-level – culture, translation, history, political system; and on an individual level – age, education/ sufficiency of information on the EU, and contact with Europe.

Table 19. Summary of explanatory variables

Level	Local condition	Specification	Example
Contextual/ global level	Geopolitical context	<ul style="list-style-type: none"> Political/ social/ economic environment Security context/ threat perceptions 	<ul style="list-style-type: none"> Maritime conflicts in South China Sea (CHN, JPN) Self-image as emerging power (BRA) Self-perception as global leader (USA)
	Economic (inter)dependence	<ul style="list-style-type: none"> Desirable political tool vs. risk of one-sided economic dependence 	<ul style="list-style-type: none"> (Perceived) dependence on development aid (ZAF) Perception that EU acts merely on its own economic interests (IND)
Country level	Culture	<ul style="list-style-type: none"> Cultural clashes Diverging norms & values Commonalities/ common cultural roots 	<ul style="list-style-type: none"> Conflicting 'Human rights cultures' (EU-CHN) 'Embeddedness' in European culture (BRA)
	History	<ul style="list-style-type: none"> Appreciation of common historical ties Criticism of historical encounters 	<ul style="list-style-type: none"> Joint history appreciated (CAN, MEX) Negative impact of colonial legacy (BRA, ZAF)
	Political System	<ul style="list-style-type: none"> Media freedom Information monopolies (De)centralisation 	<ul style="list-style-type: none"> Censorship (RUS, CHN) Decentralised administration structures (CAN)
	Translation	<ul style="list-style-type: none"> 'Political correctness' Fragmented language landscape 	<ul style="list-style-type: none"> Adequate translation of messages (CHN, JPN) Variety of language spoken (ZAF, IND)
Individual level	Education/ Sufficiency of information	<ul style="list-style-type: none"> Lack of knowledge about EU Access to information 	<ul style="list-style-type: none"> Education programmes not known among general publics Media accessibility in big countries sometimes challenging
	Age	<ul style="list-style-type: none"> Older people evaluate EU more positively 	<ul style="list-style-type: none"> In BRA, CHN, JPN, MEX, USA, ROK, RUS older respondents' perceptions of

			the EU are significantly more positive
	Contact with Europe	<ul style="list-style-type: none"> • Personal ties through study/ work stays • Family ties 	<ul style="list-style-type: none"> • Personal contact with Europe influences perceptions positively (except IND)

2.3.1 Geopolitical context

The geopolitical context – an external factor influencing the public's perceptions of the EU – impacts perceptions in two ways. Firstly, societies contextualise the EU's role as a potential partner in international relations within their specific geopolitical context. Secondly, the geopolitical context including the country's political, social and economic environment shape the publics' perceptions per se and hence their perceptions of the EU.

All available data reveal that publics are generally more prone to have an opinion on the EU if it resonates with or impacts their local reality. The view thereby differs depending on the country's geopolitical surrounding and perceived threat/ opportunity situation. In nine of the 10 Strategic Partner countries (exception: Russia), the EU is considered a desirable partner and leader in world affairs. Still, the USA and China are seen as more probable leaders due to the perception of their immediate impact on the publics' reality. In media in China, India, Japan and Russia, the USA is particular strongly portrayed as the more powerful and important actor. Russian media draws a critical picture due to the EU's role in the Ukraine's crisis and its sanctions against Russia.

Turning to more country-specific geopolitical considerations, Brazil, for instance, perceives itself as an emerging power that wants to be taken seriously in the international arena while favouring multilateral approaches. China accentuates the EU's role as counterweight to the US – also in the context of the rising tensions in Northeast Asia, particularly on the Korean peninsula. Japan offers another perspective highlighting the US' comparatively more important role vis-à-vis China. Similarly, Canada is keen to explore the potential for cooperation with the EU considering shared concerns towards China as well as the EU's lack of hard power and the fact that bilateral solutions are sometimes more effective than the EU's multilateral approach.

In South Africa, the one-sided dependency on EU financial assistance matters, which leads to tense bilateral relations at times with the perception of being too dependent on the EU and the ill-balanced nature of the relationship. Hence, South Africa aims to diversify its relations in the direction of other emerging powers. In contrast, Mexico strives for enhanced cooperation with the EU because it considers Latin America to be politically, socially and economically fragmented and in need of more effective institutions. US media, in comparison, draws an ambivalent picture of the geopolitical context portraying the EU on the one hand as an important partner and Europe as a crucial continent to keep unpredictable Russia under control. For Russia itself, the EU plays a crucial role in geopolitics: in media, the EU is presented as a close 'other' able to impact Russia politically and economically.

2.3.2 Economic (inter)dependence

Economic interdependence is regarded as a desirable political tool by some, for instance to lessen US economic influence; others stress that one-sided economic dependence on the EU is risky and should be avoided in the future.

The EU is seen in most countries as an influential economic player on the global sphere, surpassed only by the US and China (see Table 20). Only Russia is the exception: the EU's influence is seen as minor compared to the US, China, the IMF and Russia itself. However, across all countries, the EU is perceived as an economic actor weakened by the economic/financial and Greek crisis: in some countries, the crisis' impact on the country's individual commercial relations with the EU is of particular importance (specifically, in Brazil and Canada; also in China, Japan, US).

Table 20. The EU's influence in global economic affairs

Responses from:	Very influential	Somewhat influential	Not very influential	Not at all influential	Do not know/cannot answer	Total responses (N)
(all countries)	32,7%	43,8%	12,2%	1,8%	9,5%	11621
USA	26,8%	36,0%	12,9%	2,4%	21,8%	1007
Canada	27,5%	40,2%	10,5%	2,4%	19,4%	1022
Russia	23,6%	52,5%	13,9%	3,7%	6,3%	1321
Japan	17,5%	47,5%	14,0%	1,4%	19,7%	1024
China	29,6%	55,5%	11,5%	0,7%	2,7%	1410
Brazil	49,5%	34,0%	8,5%	1,7%	6,4%	1210
Mexico	46,9%	37,4%	10,4%	1,1%	4,2%	1164
S. Korea	28,8%	52,9%	12,6%	1,2%	4,4%	1238
S. Africa	40,5%	38,6%	10,3%	1,8%	8,8%	1169
India	34,2%	37,8%	18,4%	1,8%	7,9%	1056

Based on survey Q6: In your view, how influential in global economic affairs are the following countries and organisations: European Union

The perception of bilateral economic relations varies: while Canada and Mexico require the EU to act more as a counterweight to the US while promoting FTAs, South Africa feels that they should become more independent of the EU's economic assistance. In South Korea, interviewees predominantly perceive a positive change in relations due to the FTA negotiations. Russian media and interviewees notice the EU dependence on Russian oil and gas supplies while at the same time admitting that Russia also depends on its exports to the EU. In the context of economic sanctions, this interdependence increasingly causes concern.

2.3.3 Political system

The political system seems to impact the assessment of the messages the EU aims to send out – be it through censorship (China) or implicitly through a certain set of prioritised norms (USA).

The political system of a country influences which image of the EU media portrays and how the public assesses the EU's international or regional role. For instance, media in political systems circling around realist security and power concepts (China, the US) do not portray

the EU as a normative power. Among media or civil society elites the reference to diverging political systems in- and outside the EU serves to reflect on national specificities, weaknesses or strengths in their respective country, e.g. different electoral systems (Brazil), or protection of human rights, strengthening of administrative structures (Mexico).

A country's political system affects the way information is distributed. In the case of China – and to a lesser extent in Russia – the political regime creates a powerful information monopoly through censorship. It influences *what* information people can access and *how* they perceive it. Contrastingly, within Japan's or South Korea's political systems the freedom of media is highly protected and appreciated, empowering media to freely select and pursue their journalistic interests.

Canadians feel that due to Canada's decentralised political structure, they feel closer to the EU's political system(s) than to the USAs'. In China, diverging political systems hamper common understanding on certain issues, for example finding consensus on human rights matters. In India and Mexico, the EU's political system is seen to be too complex and non-transparent while at the same time serving as a model for integration. Russians perceive the differences in political systems and values as a hindrance for meaningful EU-Russia cooperation.

2.3.4 History

Some appreciate common historical ties with Europe (Canada). Others countries, especially those with a colonial legacy, regard the past as an obstacle to successful relations (Brazil, India, South Africa).

Preceding studies particularly reveal a colonial legacy as an influential factor shaping people's perceptions towards Europe and indirectly on the EU. In Latin American and African countries, European colonial past causes resentment which leads to the feeling of the EU acting according to a civilisational agenda and with a patriarchal and patronising mind-set.

Among Brazilian elites, the perception of European colonialism evokes mixed reactions: while some stress that historical experiences matter for contemporary relations, others indicated that even if they did, it would not necessarily have a negative impact. In Mexico, the historical appreciation of Europe can even have a positive effect on Mexican perceptions of the EU. Indian media outlets furthermore highlight the still influential historical connection between India and the UK. The same accounts for US media paying special attention to events in the UK and raising concerns about a weakening of the special historical relationship between the two countries.

Canadians have a rather positive reading of history too: they specifically mention the political partnership after World War II as an important achievement. History matters here also in the context of the decentralised structure of Canada, as different regions have different historical experiences with Europe. Media analysis furthermore shows that World War I and II (Japan, Canada, US, South Africa and India) are important elements shaping Europe's image in the world.

2.3.5 Culture

Culture⁸ seems to affect not only how people conceptualise Europe but also if they assess it positively or negatively. Clashes can be in the area of human rights (China) or data protection (USA) while positive connotations can come from common heritage (Canada, Mexico).

While the distinctiveness of cultural/ social norms can lead to clashes and conflicts, for instance in the area of human rights (China) or data protection (USA), a common cultural heritage can also enhance the willingness to cooperate in various areas ranging from culture, to education and trade (Canada, Mexico). Brazilian media appreciates the common culture with Europe, particularly in arts, literature and cinema. At the same time, in the evaluation of culturally emerged norms and hierarchies, Brazilian – and similarly, South African – media however negatively list keywords such as prejudice, xenophobia, racism, islamophobia and historical anti-Semitism. Indian media presents European culture as appealing: Europe is the favoured vacation destination for middle-class Indians.

Elite interviews draw a diverse picture of the role of culture: while Brazil seeks to strengthen its distinctive culture instead of stressing its European heritage, Canada and the US appreciate the cultural closeness to Europe. Common values and mutual trust are also mentioned in Japan and South Korea – in spite of their perceived distinct culture. In China there is some recognition that globalisation is impacting cultures around the world while at the same time acknowledging that cultural barriers still exist. In South Africa, cultural closeness to Europe is appreciated but exists in parallel to a feeling of cultural imperialism connected to European lifestyle. Russian interviewees indicate that EU's propagandist culture weakens EU-Russia relations while Russian media portray the EU as a politically, economically and culturally close 'Other', though not a role model.

2.3.6 Translation

While previous studies did not examine the role of translational issues in foreign relations, interviewees for this study agree that translation does impact the way people perceive the EU. Access to information on the EU is only easily accessible for English-speaking parts of the population.

In Brazil, China, India and South Korea interviewees mentioned that not knowing English (or at least one or two European languages) impedes the ability to receive and understand the EU's messages. On the other hand, the EU also fails to understand messages in non-European languages. Accordingly, the mutual language barrier causes difficulties in exchanging, transporting and comprehending each other's messages. Media in China show a complementing nuance: language is important when aiming to frame messages in a subtle, 'politically correct' manner to avoid censorship.

2.3.7 Age

The public opinion survey reveals that there is a strong correlation between people's age and their likelihood to regard the EU in general as well as its leadership role in a positive light.

⁸ Culture is understood here in its anthropological dimension as a crucial local factor or condition shaping the way how perceptions are shaped, expressed and transported (incl. political culture etc.).

Despite the fact that the impact of age strongly differs across countries, a significant correlation between respondents' age and their perceptions toward the EU and its policies has shown: while younger respondents from Canada, India, South Africa and USA were more likely to evaluate the EU positively, in Brazil, Japan, Mexico, Russia and South Korea the opposite is the case.

2.3.8 Education/ sufficiency of information on the EU

Although the influence of the level of education and information on perceptions has not yet been analysed in detail within the existing literature, this study reveals that a significant correlation exists between positive attitudes towards the EU and the degree a person is informed about the EU.

A lack of knowledge about the EU has surfaced as a key factor on why people in non-EU countries perceive the EU's decision-making processes as non-transparent and its messages incoherent (India, Canada, Russia). The public opinion survey corroborates this finding indicating that respondents best informed about the EU are up to three times (Brazil, Canada, China, South Africa, USA) more likely to hold positive general views about the EU, than those who are least informed and/ or have no interest in receiving more information. Interestingly, among Indian and Russian general public this correlation is not that pronounced, while in Japan it is not significant at all. In this context, the sufficiency of information on the EU seems to play a varying role. In Mexico, for instance, it significantly affects the overall view on the EU, the desirability and likelihood of EU's leadership in world affairs and the assessment of the EU's performance in various fields.

Contrastingly, the level of education does not seem to significantly impact the way the EU is perceived. Here, Mexicans and Canadians constitute exceptions as in these countries more educated people assess the Europe, the EU and its policies more positively.

2.3.9 Contact with Europe

Personal ties to Europe through education, study or training programmes are important means to generate positive perceptions of Europe and indirectly of the EU.

Personal connections, such as study trips or training stays are evaluated by elite interviewees across countries as enhancing a positive image of the EU and Europe. Contact with Europe proves to have a positive influence on how public opinion survey respondents view the EU. Except for respondents from India, survey participants that are or have been – even loosely – tied to Europe due to personal or professional reasons, are more likely to indicate a positive overall view toward the EU compared to their counterparts with no previous encounters. Furthermore, respondents with previous contact to EU are likely to view the relations between their country and the EU in a more positive light. They even regard the EU more often as a desirable leader in global affairs and give a more positive evaluation of the EU's actorness in various fields of international importance. Contrastingly, in India (previous) contact to Europe does not have a significant impact on respondents' perceptions.

2.4 Regional and global trends

The aggregated analysis shows some over-arching global patterns, such as a media-driven global attention to EU internal issues as expressed in the comparatively large media coverage of the migration and Greek debt crises. There is also a global trend of a continuous lack of knowledge of EU's development and education programmes. Specific regional trends are not visible within the current data set.

The study at hand points out a snapshot of tendencies that have become evident throughout the different building blocks. They are likely to influence the perceptions of the EU also in future and should be taken into account when communicating the EU in the partner countries.

Impact of the Greek crisis

Across all countries, media mostly focuses on pressing and up-to-date EU issues instead of portraying long-term developments. During the time frame under analysis the newsmakers assessed the EU's economic dimension, particularly reporting on the Greek debt crisis and its negative impact on the entire Eurozone and EU. Media not only covered the topic as a challenge to the EU's economy and institutions but also analysed (to varying extent) how this could impact their own country's state of economy. Among elites, the EU's internal financial difficulties were also regarded as posing a challenge to the EU's actorness on the international level.

Role of FTAs

In all Strategic Partner countries negotiating or having negotiated an FTA with the EU, it was noticed by the media, elites and the general public. This makes FTA's an important tool to increase the EU's visibility and actorness – also in thematic areas other than economy and trade.

Migration crisis

Across all Strategic Partner countries, the migration crisis is extensively reported on and evaluated in its various dimensions. It is assessed on the one hand to threaten the EU's internal economy and institutions. On the other hand, media and elites use the refugee crisis as an example of the EU not living up to its own (human rights) standards and social values.

Invisibility of education, development and research, science and technology in media

While media in all analysed countries rarely reports on issues related to the EU's policies in the fields of education, international development and science, research and technology, elites and to some extent the general public mark these areas as important for (future) collaboration. Environment and energy are furthermore among the least visible media topics, with Russia presenting an exception: here, media as well as elites and general public regard the EU's dependence on Russian oil and gas as an important topic shaping EU-Russia relations. Notably, environment has become more visible with the upcoming COP21 in Paris.

Culture

European culture – encompassing among others arts, lifestyle, luxury goods, literature, welfare and tourism – is a very vibrant and appreciated topic among the general publics of

the EU's 10 Strategic Partner countries. As Table 21 shows, culture is much more associated with Europe and/ or individual EU Member States than the EU as a whole.

Table 21. Which term – Europe or the European Union – is associated with culture and sports?

Responses from:	'European Union'	'Europe'	No difference between them	Do not know/ cannot answer	Total responses (N)
(all countries)	17,6%	49,1%	20,7%	12,6%	11621
USA	13,4%	38,3%	23,6%	24,6%	1007
Canada	9,1%	44,5%	21,8%	24,6%	1022
Russia	10,2%	53,3%	27,6%	9,0%	1321
Japan	7,0%	47,4%	21,4%	24,2%	1024
China	23,1%	56,0%	16,7%	4,2%	1410
Brazil	23,1%	52,4%	15,2%	9,3%	1210
Mexico	25,6%	53,6%	16,8%	4,0%	1164
S. Korea	18,5%	48,9%	21,8%	10,8%	1238
S. Africa	15,7%	57,1%	15,9%	11,4%	1169
India	28,5%	33,5%	27,7%	10,3%	1056

Based on survey Q23: 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: Culture and sports.

The EU's role in the world

A majority of the general public in the 10 SP countries considers the EU's leadership in world affairs as likely (likely 22.7 per cent, very likely 36.7 per cent) and desirable (very desirable: 18.9 per cent; desirable: 34.9 per cent), with Russians presenting a significant exception to this assessment: here, EU ranks last (very desirable: 8.3 per cent; desirable: 22.8 per cent). In all countries, the US leadership is however regarded as more desirable and also more likely than the EU's, with the EU ranking second or third.

The local 'hook'

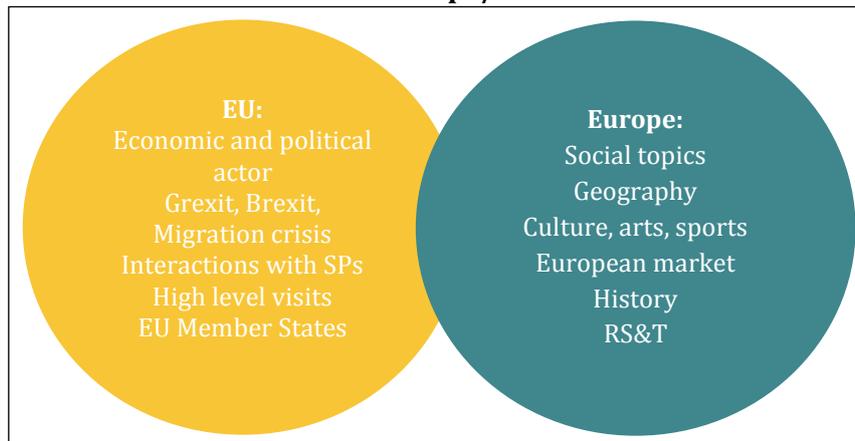
As concerns local conditions, in particular historical ties and cultural proximity/ distance have a marked impact on perceptions of the EU. While both variables are assessed positively in Canada and Mexico, historical encounters are perceived very ambiguously in India and Brazil and overall rather negatively in South Africa. Cultural kinship or dissimilarities and historical encounters must be taken into account when reaching out to the publics in each of the 10 Strategic Partner countries.

2.5 Main findings on EU vs. Europe

Drawing mainly on the insights of the media analysis and the public opinion poll, several differences and commonalities in the perception of EU vis-à-vis Europe emerge.

While the media is effective in reporting current news/ crises it seems less able, capable or interested in covering other **EU** policy spheres. This presents several problems: the constantly changing nature of news on the **EU** as crises come and go; a general contextualisation of **Europe** being reactive rather than proactive; and a diminished local relevance for the Strategic Partners as **Europe** is principally examined in isolation rather than through any local or bilateral linkages (an exception are bilateral business and trade issues: for some countries, visibility of Europe is higher than the EU's).

Figure 2. Overview of themes connected to Europe/ EU



Based on media analysis of EU and Europe news across the 10 SP countries

Across all countries, media reports mainly on the **EU** in connection to dramatic events and crises, such as Grexit, Brexit, and the migration crisis. The reporting is characterised by strong negative connotations associated with the events taking place in the **EU**, as well as the EU's role in coping with them. Further topics of high interest are high-level visits and interactions with the respective countries (e.g. the EU-China Summit, or the EU-CELAC Summit). **Europe**, on the other hand, is mainly used as a geographical indicator and connected to a broad range of topics, ranging from culture, lifestyle and art sections, to business, world, and main local news. As for the visibility of the **Member States** within the EU news stories, in all 10 countries the same four Member States stand out: Greece, Germany, Great Britain and France. Each received media visibility in their own right. Germany and Greece – the most reported EU Member States in all locations (other than India) – were frequently reported in tandem. Germany was the main actor in the unfolding Greek drama. The UK was extensively reported in relation to its well-publicised election and possible Brexit. France was occasionally reported in the context of the Greek crisis, but more often in a wider variety of topics – such as its role in EU-CELAC⁹ summit, business activities, or in relation to the World War I (WWI) and WWII commemorations. Asked about the attractiveness of Member States, the general public mentioned France, Germany and Italy most often.

The **EU** is framed in media and seen by the public to act mainly in the political, economic and social spheres, while the **EU** actions in other areas (energy, environment, RS&T, development) are barely covered. The local 'hook' matters: media in all countries assigned higher visibility to **EU** actions when this was directed explicitly to that country, its immediate geopolitical region, or its key partners. Generally, the actions of the **EU**, its institutions and leaders are evaluated as neutral, but in three most visible areas of political, economic and social affairs, the evaluations are more negative than positive.

As **Europe** is mainly used as a geographical concept, references to the actions of **Europe** are limited; in few cases (especially in India), both terms are used as synonyms; on average 20

⁹ Biannual summits between the EU and the Community of Latin America and Caribbean states (CELAC).

per cent respondent across countries saw no difference between the **EU** and **Europe**. Compared to the **EU**, reports on **Europe** cover mainly a broad spectrum of social topics, and to a limited extent – economic topics. The general public connects **Europe** most strongly with culture and sports, as well as science. In comparison with **EU** news, the number of stories about **Europe** in the areas of research, science and technology was slightly higher, but again reporting on environment and energy was very low.

2.6 Aggregate analysis: core findings

Across all analysed themes, data and key audiences, the EU is most visible and perceived as most effective in the economy, including trade and business. At the same time, the Eurozone and Greek debt crises have added to the EU's visibility, but its effectiveness and actorness were evaluated negatively. The second most visible area is internal politics: the EU is considered active and effective mainly within its borders, although debates surrounding a potential Brexit or Grexit have weakened this assessment. In external and security affairs, the EU's effectiveness is still seen to be limited, though its leadership desired. Culture is also an area of high visibility that resonates to the public across all countries, but is connected to Europe more than to the EU. Visibility in the area of migration, multiculturalism and human rights has sharply increased, but the EU's actions are mostly perceived in a negative light across countries. This also reflects on the perception of the EU's normative actions: the EU is evaluated as providing a high standard of living to its citizens, but at the same time not meeting its standards in its treatment of migrants.

Surprisingly, despite the efforts devoted to science, research and technology, environment and energy as well as development and education the EU the media only rarely reports on the EU's actions in these fields. Nevertheless, the EU is considered mostly as an effective actor and – as evident in the reporting on the upcoming COP21 – desired partner and even as a norm setter in the area of environment. Furthermore, the EU is perceived as an international norm setter in some areas, such as energy technology or gay rights.

Elite interviews point out potentially influential factors in creating, shaping and enhancing perceptions in the local context: particularly historical and cultural commonalities entailing common (or diverging) norms and values are seemingly important impact factors for establishing and nurturing good relations between the EU and its Strategic Partners.

Analysis showed that the identification of regional trends is not feasible based on the collected data: instead, over-arching global patterns of themes, such as extensive media coverage of the migration and Greek debt crises and lacking knowledge of EU's development and education programmes have become apparent. Across all countries, media mostly focuses on pressing and up-to-date EU issues, instead of portraying long-term developments. While media only rarely reports on issues related to EU policies in the fields of education, international development and RS&T, elites and to some extent the general public mark these areas as important for (future) collaboration.

3 COUNTRY CHAPTERS

The Country Chapters present country-specific findings drawing on data from all building blocks. Beyond generalisable trends, the EU's ten Strategic Partner countries analysed in this study vary significantly in regard to their political systems, economic development, cultural particularities and societal norms and values; the following chapters therefore complement the study with individual assessments of perceptions in the respective countries. The subsequent chapters draw a detailed picture of perceptions towards the EU/ Europe in Brazil, Canada, China, India, Japan, Mexico, Russia, South Africa, South Korea and the USA – as presented in media analyses, social media analysis, public opinion surveys, and informed by elite interviews and EU Delegation interviews.

3.1 Brazil

This Country Chapter presents a synthesis of the Brazil-specific findings of media analysis; elite interviews 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 Brazil according to the research criteria applied – namely visibility; actorness and local resonance; and norm-setter. Moreover, in the section on actorness and local resonance, we discuss these according to the themes analysed in this research: economy and trade; politics and security; normative and human rights; development – including the social internal and international dimensions; migration, multiculturalism and human rights; environment and energy; science, research and technology; culture; and education. The final section before policy recommendations looks at the local conditions that explain the perception of the EU in Brazil. Finally, we conclude the chapter with recommendations for Public Diplomacy, including a subsection on recommendations in the eyes of the EU Delegation to Brazil.

3.1.1 Sample

Public opinion

The online omnibus survey was coordinated and analysed by the Public Policy and Management Institute (PPMI) and conducted by TNS Global. The respondents in Brazil were surveyed in Portuguese. Data collection took place in August 2015. The online omnibus survey was designed to be nationally representative with regards to age, gender and region. The survey covered a total sample of 1210 individuals within the 16-64 age group.

Media

The media content analysis was designed, supervised and coordinated by the National Centre for Research on Europe (NCRE), University of Canterbury, New Zealand, and conducted by local researchers trained by the NCRE. Two popular prestigious papers of the highest national circulation *Globo* and *Folha de São Paulo* and a business daily *Valor Econômico* were monitored daily between April 1 – June 30 2015. Two separate datasets were collected over the period of observation – 'EU' (573 articles) and 'Europe' (286 articles). Key search terms for dataset 'EU' included (with acronyms) 'The European Union', 'The European Commission', 'European Parliament', 'European Court of Justice', 'European Central Bank', 'European Presidency', 'Council of the European Union', 'Eurozone'. The key search terms for dataset 'Europe' were 'Europe' and 'European'.

Elite opinion

The NFG coordinated the interview programme and designed the questionnaires in close coordination with the Country Experts and the project partners. The NFG was also responsible for the training of the Country Experts and supervision of the implementation of the interviews. The interviews itself were conducted by the Country Experts. Interviews have been conducted as a source to identify upcoming trends and to cross-check findings. They are non-representative due to their current scope and should be considered as a tool for future evaluations in a representative volume. The NFG chose a three-phased approach: in Phase I, two transcripts were due until June 6; in Phase II, five interviews were due until July 15; and in Phase III, five interviews were due until August 17. The NFG was in charge for the coding of the transcripts and the provision of the results to the project partners.

Interviews in Brazil were conducted in Portuguese and translated and transcribed by the Country Experts. They interviewed 11 experts (Civil Society/ NGO (2), Academia/ Think Tank (3), Business (1), Policy-makers (3), Youth (1), Media (1)) and held one group interview with five BA-students (International Relations) from the Pontifical Catholic University of Rio de Janeiro.

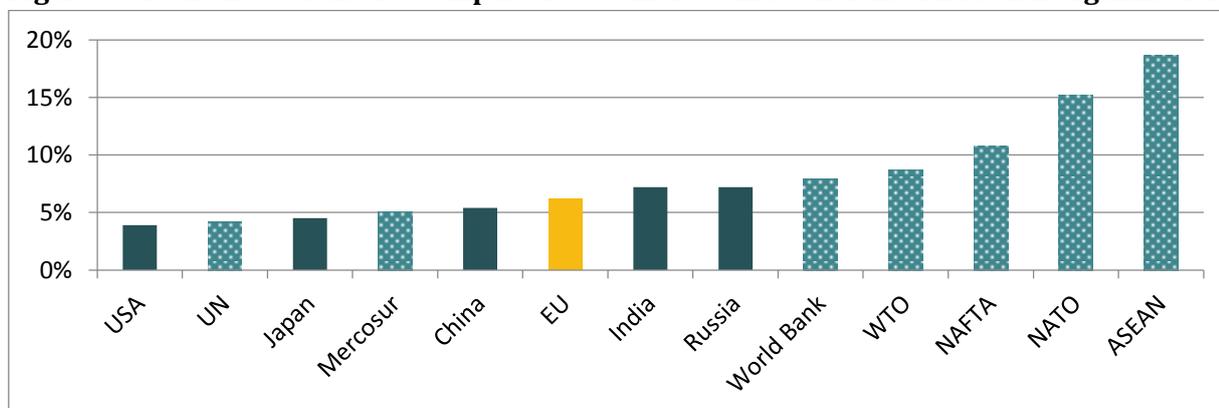
Semi-structured, anonymous qualitative interviews under Chatham House Rules were conducted with all EU Delegations across the 10 Strategic Partner countries, primarily in the form of a group interview. The groups included Heads/ Deputy Heads of Delegations, Heads of Press and Information Section and/ or Heads of Political Affairs Section. Interviews lasted between 60 to 90 minutes. In Brazil, one diplomat was interviewed.

NB: two robust datasets collected in the course of public opinion survey and media monitoring allow for quantitative and qualitative analysis of data (for more detailed information, please see attached country-specific media and public opinion reports). Survey of elite opinion is impressionistic due to small numbers of the interviews. Data collected is analysed using qualitative approach.

3.1.2 Visibility

In the eyes of the Brazilian *public*, the overall visibility of the EU is relatively low, albeit slightly higher than that for India and Russia (see Figure 3). The EU was ranked as the third most visible international organisation, after the UN and the regional organisation of Mercosur.

Figure 3. Awareness of the EU compared to countries and other international organizations



Note: Based on the answers to survey Q1 (option 'Do not know/ cannot answer'): Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations? (N = 1210)

Media visibility of the EU was traced in three leading papers – two popular dailies *Globo* and *Folha de São Paulo* and a business daily *Valor Econômico*. These papers featured a sizable sample that referenced the EU and its institutions (573 articles in three months) and Europe (286 articles). The averages for the 10 country sample were 505 articles in the EU dataset and 635 articles in Europe dataset. Articles reporting the EU tended to be of medium length whilst assigning the EU a major degree of centrality (i.e. the EU and its institutions were profiled as the main actors in the news story) (Figure 4). Despite limited visual support, such framing indicated heightened media visibility of the EU. Europe, in contrast, was presented from a minor perspective in longer articles (Figure 5). Such framing suggests a ‘diluted’ visibility of the concept. Among the most visible topics reported were the Greek debt crisis (portrayed usually neutrally but sometimes negatively especially when the EU was presented as imposing harsh conditions on Greece), the irregular migration crisis in the Mediterranean and EU policies on migration (viewed in a negative light) and the British General Election (presented typically neutrally). Remarkably, the three-month period of observation had no news about the EU’s policies, programmes or initiatives *in* Brazil. This lack of the local ‘grounding’ for the EU actions could be one explanation for the relatively low visibility of the EU in the eyes of the general public.

Figure 4. Degree of centrality (EU news)

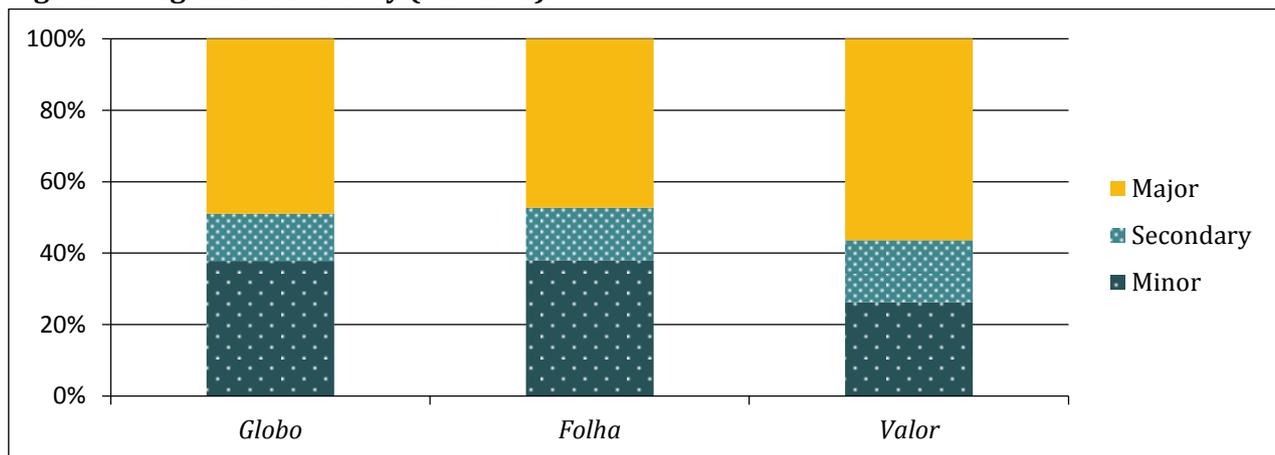
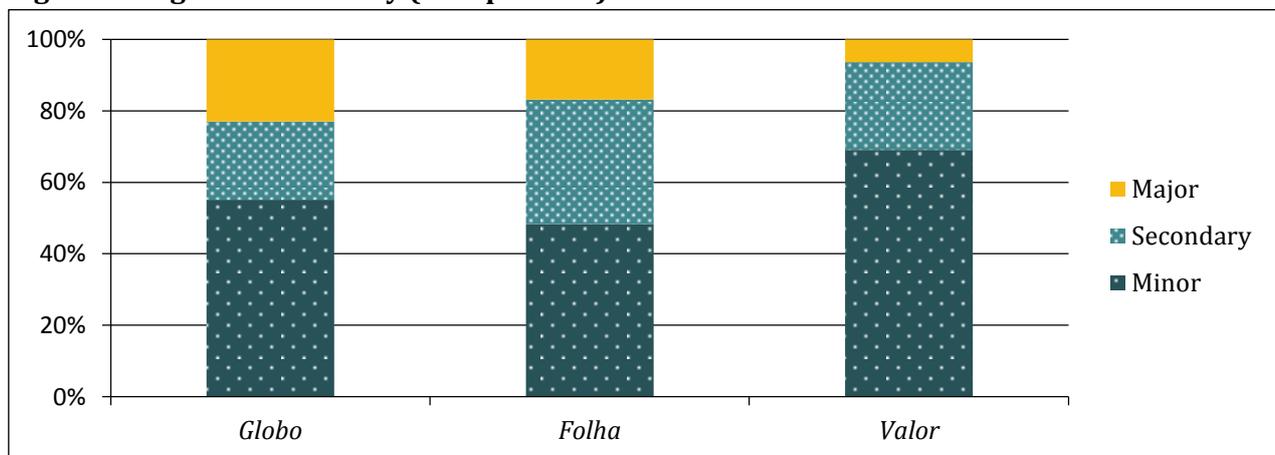


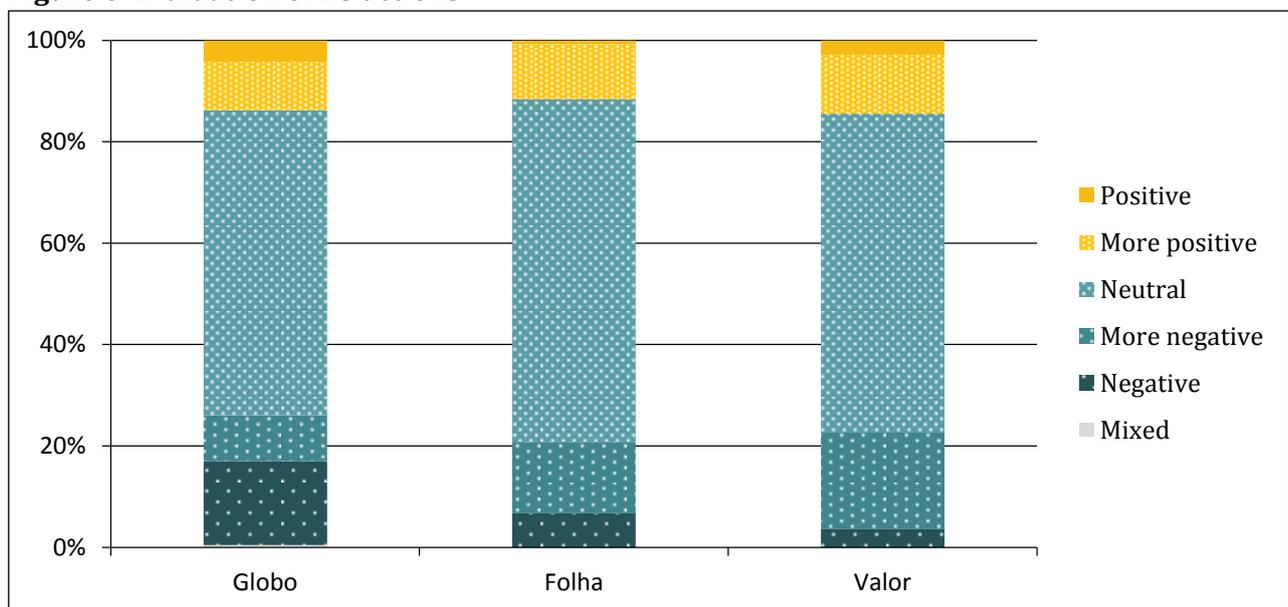
Figure 5. Degree of centrality (Europe news)



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 was 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. The most cited EU institution was the European Central Bank, followed by the Commission, both appearing – once again – in the context of negotiations with Greece. Greek Prime Minister Alexis Tsipras was the Member State leader mentioned the most, followed by Angela Merkel (again usually featuring in news items about Greece), David Cameron (in the context of the UK election), Yanis Varoufakis (Greek crisis) and François Hollande. Jean-Claude Juncker 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 and Mario Draghi (in stories about Greece). In contrast, Federica Mogherini was only mentioned 11 times, mostly in the context of EU policies on migration (and the need for UNSC approval for the EU’s plan to attack traffickers’ vessels in Libya’s territorial waters) or the P5+1 negotiations on Iran’s nuclear programme. The general evaluation was that EU reporting was neutral in tone, yet when present, negative evaluations were somewhat more visible than positive (see Figure 6).

Figure 6. Evaluation of EU actions



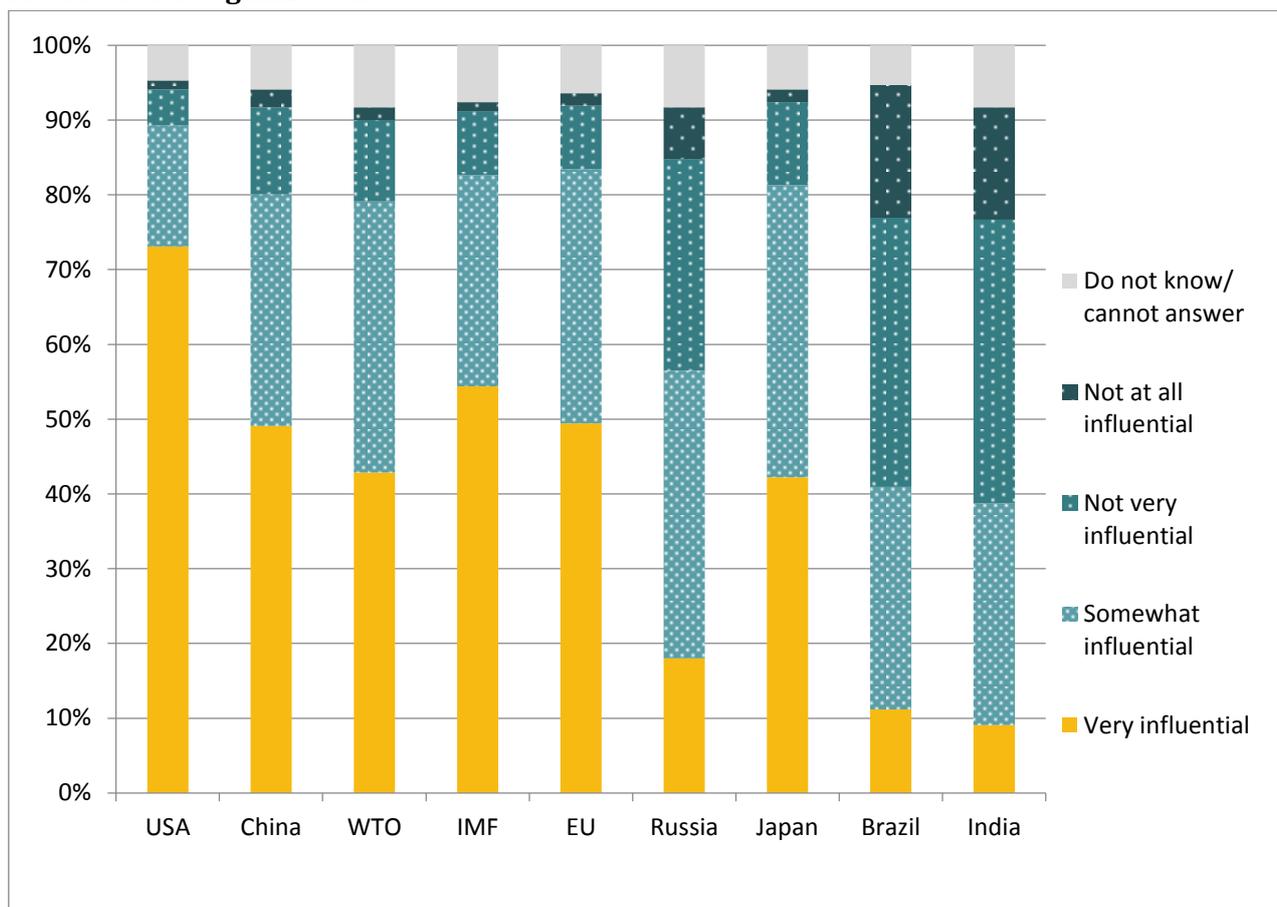
Local *elites*, who are arguably better informed on the EU than the general public and more engaged with the EU directly, explicated knowledge and awareness of EU actions *with* and *in* Brazil. These perceptions are detailed below.

3.1.3 Actorness and local resonance

The EU as a partner

The *general public* saw the EU as an important and trustworthy **partner** for Brazil in international relations. The EU was among the global players Brazilian respondents saw as most influential: however, in this respect it lagged behind the US. When compared with international organisations, respondents viewed the EU’s global economic influence slightly above that of the IMF and the WTO (see Figure 7). Brazil’s *general public* saw the EU’s leadership in world affairs as desirable (in rankings, the EU was behind Japan and Brazil in terms of overall desirability of its leadership). The EU ranked only behind the US in terms of the likelihood that it will take a strong leadership role in the future. In Brazil, most respondents see the US to be a major player in world affairs in the future.

Figure 7. EU's influence in global economic affairs compared with countries and other international organizations

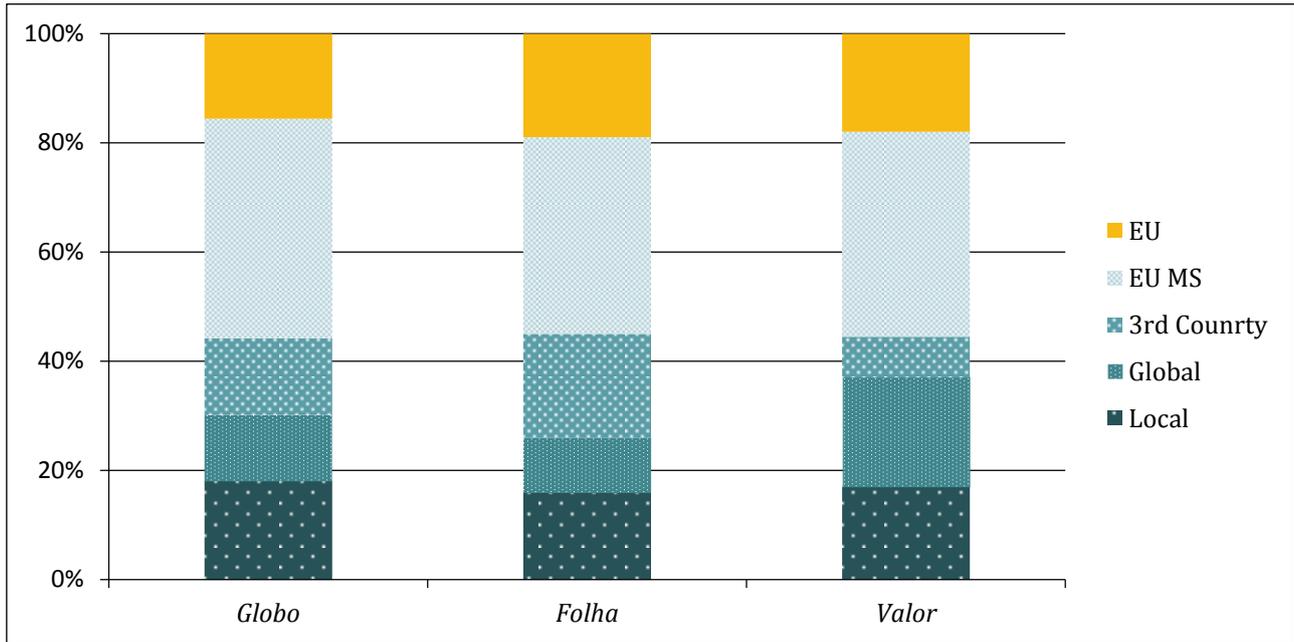


Note: Based on the answers to survey Q6: In your view, how influential in global economic affairs are the following countries and organizations? (N=1210)

The EU is seen by local *elites* in a positive light not least ‘for not being a traditional state, for being an actor based on law.’ This ‘institutionalist-legalist bias’ of the EU noted by one interviewee is seen from a positive angle as it frames the EU as a ‘more constructive actor in international relations’ (Policymaker, Coordinator of Trade Negotiations.). *Elites* linked the EU’s global impact to the ‘leadership and personality questions.’ Germany in this regard was seen to have an important role. Positive perceptions also come from existing historical links, affinity in culture, and in comparison with other actors such as US. In this comparison the EU is seen as ‘more soft power’, ‘not associated with military action despite past history.’ The EU is also perceived by elites as a ‘model of society to be followed, including the welfare system.’

Elite attention to the role of EU Members States parallels the patterns found in the media analysis. In the Brazilian *media*, the EU actions were reported within the general EU context as well as within the context of specific Member States (Figure 8). The EU was framed in these locations as an actor who mainly acts on the European continent, with its own members and their citizens. This focus of domesticity was somewhat predictable, due to the severity of the unfolding crises in the EU. Yet, Brazil displayed a low share of EU news with the local ‘hook’ (under 20 per cent). Such ‘hooks’ are believed to increase the readers’ perceptions of relevance of an international actor to the country in question. The combination of low local focus and high external focus suggests that the EU is framed as an actor who acts far away, without any clear link/ impact or relevance to the location in question.

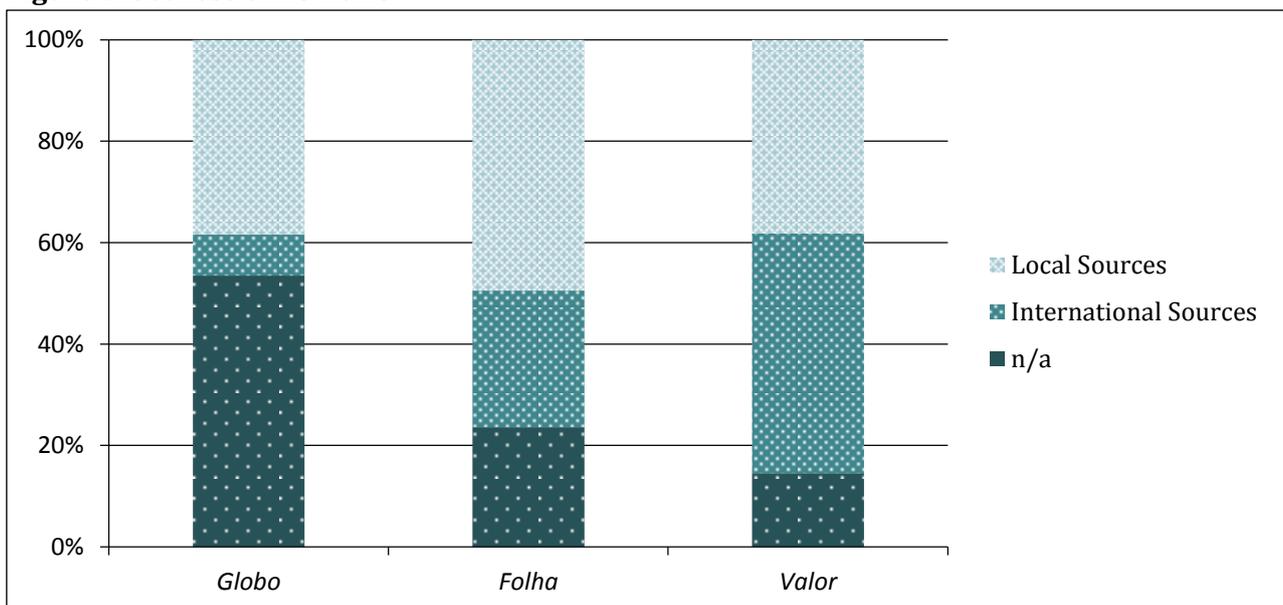
Figure 8. EU News ‘with local hook’ vs. news without it



While the EU was not reported acting *in* Brazil, it was widely reported as an actor dealing within the geo-political region that matters to Brazil, namely South America. Media widely covered the EU’s monitoring of democratic standards in Venezuela with a minor degree of centrality that is the EU was mentioned only in passing. In addition, EU-CELAC interactions were a focus of attention. Also, in Brazil, a higher interaction was recorded between ‘Europe’ and Brazil than between the EU and Brazil. In contrast with Brazil’s particular media framing – i.e. the absence of news about the EU acting *in* Brazil –the *general public* saw the EU’s relationship with Brazil as relatively good, but lagging behind the US, China and Japan.

Brazilian newspapers chosen for observation relied on a high share of local sources, but also accessed between 20 per cent to 50 per cent of EU-news stories from international sources demonstrating a degree of openness to the information coming from outside (Figure 9).

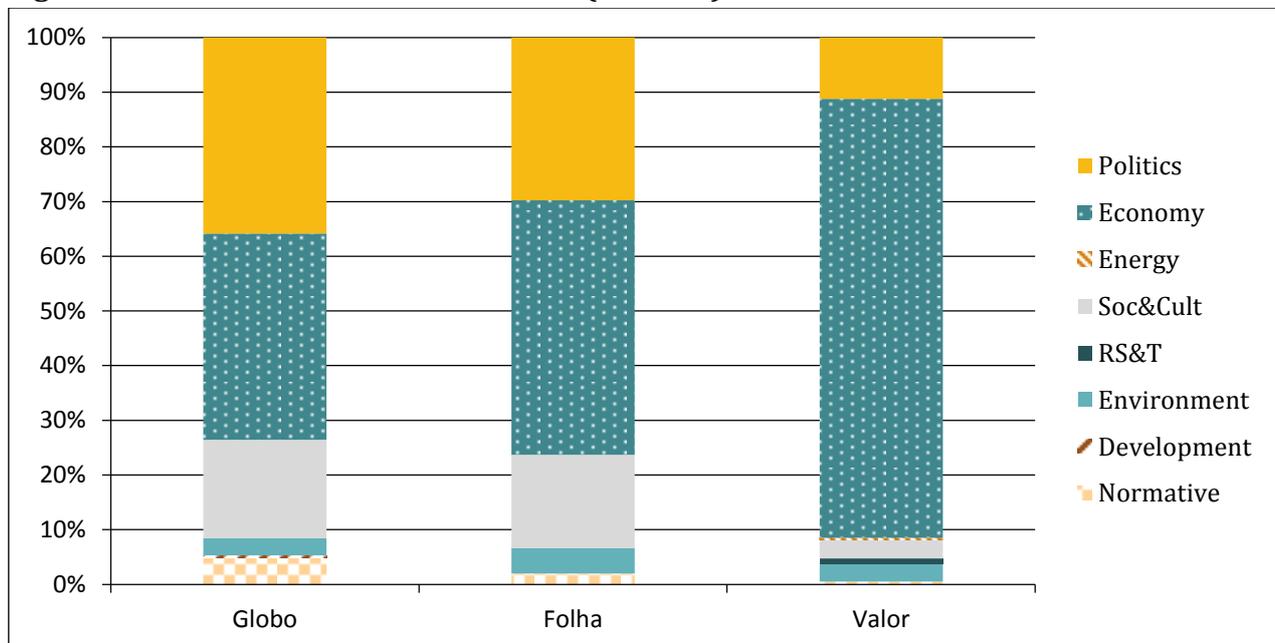
Figure 9. Sources of EU news



Economy and trade

In the observed *media*, **economic actions** of the EU were reported the most frequently (Figure 10) with the EU typically reported reacting to the Greek crisis. In this context, the EU's state of economy was the most covered topic. On the one hand, the EU was reported as an entity hit hard by the crisis - the EU's economy was often compared to an unstable structure in danger of collapse and on shaky ground. On the other hand, the EU was also portrayed as recovering from the crisis, with EU officials and institutions undertaking an array of actions to repair the situation. Such contradictory representations add to the challenges in understanding the EU. The theme of the state of economy was the second most visible for the representations of 'Europe' (with business and finance the leading frame in the dataset). Many articles were dedicated to monetary and fiscal policies (also in the context of the crisis), the state of the services and industrial sectors in Europe and Brazil and the consequences for commercial relations between the two. In contrast to the EU media dataset, Europe's economic profiles were somewhat more positive (with the latter profile closely linked to the theme of crisis).

Figure 10. Distribution of thematic frames (EU news)



In line with the main *media* profile of the EU as an economic partner and the ECB being the most reported EU institution, the ECB was also the most visible institution of the EU in the eyes of the *general public*. The Euro was the public's most visible association with the EU.

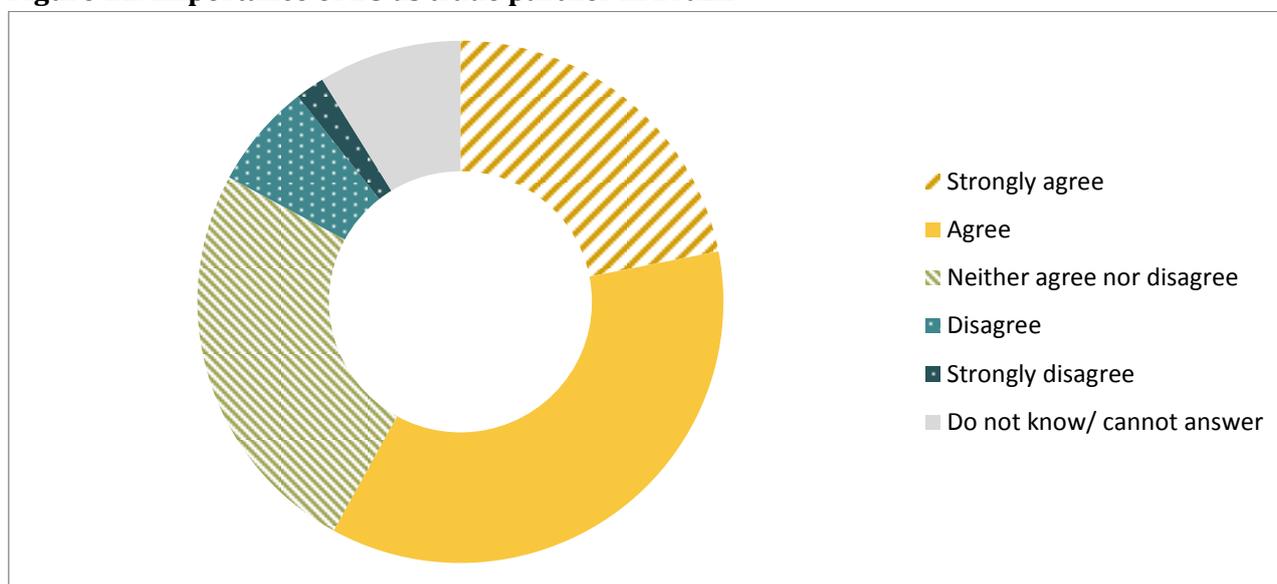
Elite opinion paralleled media frames. The EU was recognized as a political and economic model yet it has been admittedly 'harmed since the crisis.' Elites reported being 'shocked with how the Greek crisis has been handled'; others noted their 'terrible impression caused by arrogance of Germany and scorning of Southern countries, and the lack of solidarity.' Nevertheless, despite crisis, elites believed that the EU continued to be seen as an 'example of economic development.' For some, 'even with these crises that we hear about, Greece, for instance, there is still the impression that the EU will have the capacity to, somehow, administrate this, solve these internal questions and get stronger' (Policymaker, Coordinator of Cooperation with Europe).

In the *media*, EU-Brazil relations were usually mentioned briefly with regards to **trade** relations, including EU-MERCOSUR trade liberalization negotiations, mostly during the EU-CELAC summit. These were presented in a positive light – a trade deal with the EU was presented as benefiting Brazilian exports. The local angle appeared in the context of reviving EU-MERCOSUR trade liberalization negotiations, as proposed by President Dilma Rousseff during the EU-CELAC summit. Elite perceptions also singled out EU-sponsored discussions in Brasilia about an EU-MERCOSUR trade deal as an important and positive one.

However, not all EU-trade related themes were positive. EU subsidies for agriculture were briefly reported as an obstacle to deeper trade relations. This media profile echoed an opinion expressed by elites that in the economic field, particularly with regards to agriculture, Brazil has interests which do not always coincide with those of the EU. Coming back to media, while hardly any local Brazilian actor was mentioned in the media coverage of the EU, those that were mentioned were usually those involved in **trade**: Brazilian President Dilma Rousseff and Minister of Agriculture Katia Abreu and Minister of Development, Industry and Trade.

Predominantly positive connotations attached to the media portrayals of the EU as a trading actor correlate with *public opinion* perceptions. The public opinion poll in Brazil demonstrated that the EU was perceived as excelling in global trade. This view is further supported by the significant percentage of respondents agreeing that the EU is an important trade partner for Brazil (see Figure 11), as well as that the EU should have stronger economic ties with Brazil. Public opinion respondents also agreed that the EU is an important foreign investor in Brazil.

Figure 11. Importance of EU as trade partner in Brazil



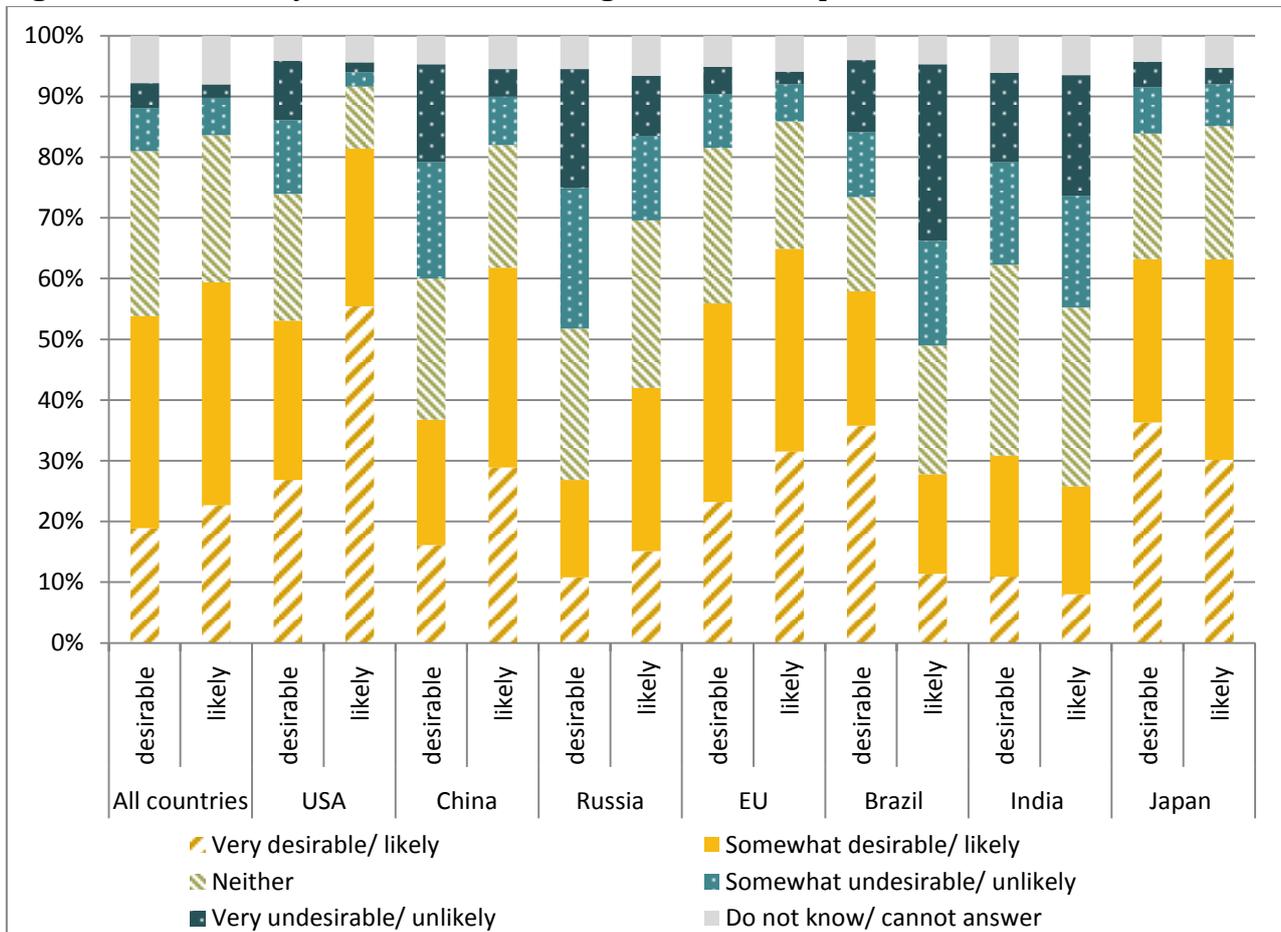
Note: Based on the answers to survey Q14: Looking from Brazil’s perspective, how strongly do you agree or disagree with each of the following statements about the economic relations with the European Union? The European Union is an important trade partner with Brazil. (N = 1210)

Politics and security

Reportage of the EU political actions was the second most visible theme in the media sample. EU’s leadership in world affairs was seen by the *general public* as more likely than desirable, and behind the US (see Figure 12). *Brazilian public opinion* on the EU’s performance in global peace and stability ranked the US and the EU similarly high, surpassed only by the UN.

Looking more specifically, the EU's fight against terrorism was regarded slightly more positively than its peacekeeping and military operations.

Figure 12. Desirability vs. likelihood of EU's global leadership



Note: Based on the answers to survey Q4: How desirable is it that each of the following countries and organisations take a strong leadership role in world affairs; and Q5: How likely or unlikely is it that each of the following countries or organisations will take a strong leadership role in world affairs five years from now? (N = 1210)

Elites echoed this vision noting that the EU was a ‘model to be followed’ in the areas of ‘social stability and peace (no border conflicts) ... [and] an actor who abdicates the projection of (military) power.’ Europe was recognised by the elites to be a ‘counterpoint to the US and Russia’ and a ‘factor which contributes to peace in the international relations.’

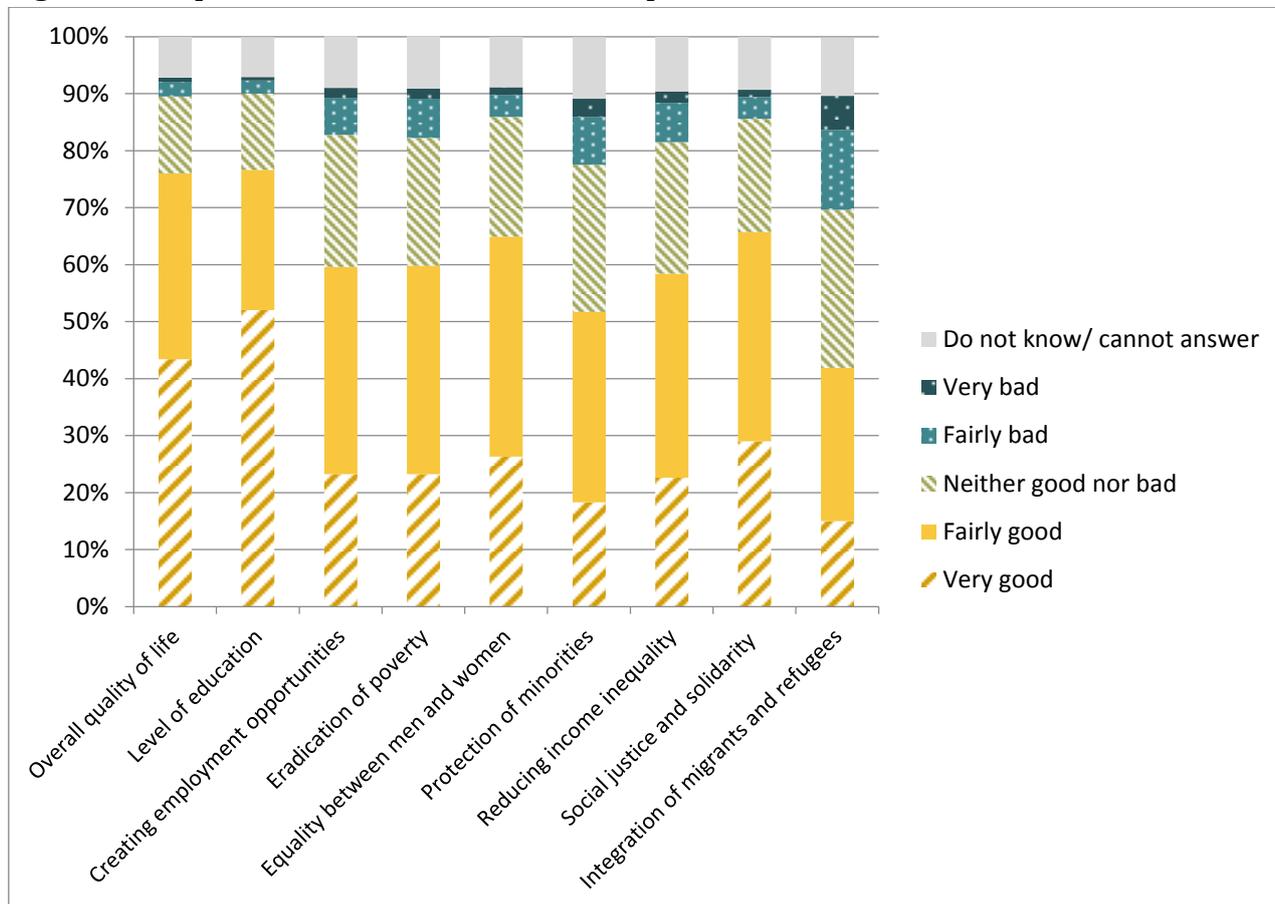
Media coverage of both the EU and Europe in the area of **peace and security** highlighted interactions with Russia, specifically in the context of conflict with Ukraine. The EU's role in the negotiations with Iran was also visible in the media reportage. Europe's coverage prioritised relations with the USA.

Development (social internal and international)

Selected influential *media* paid minuscule attention to the EU's role in **international development**. When the Brazilian public was asked about the EU's support to developing countries, they viewed the EU as less important than the UN although slightly more important than the US and World Bank. Brazilians also saw the EU as playing a more important role in this respect compared to all the countries used for comparison in the survey.

Speaking about internal social development, the areas where the EU was seen as most effective were overall quality of life and the level of education, whereas the areas where it was seen as performing less well included integration of migrants and refugees as well as protection of minorities (see Figure 13).

Figure 13. EU performance across social development indicators



Note: Based on the answers to survey Q17: Generally speaking, how well do you think the European Union performs in each of the following areas of social development? (N = 1210)

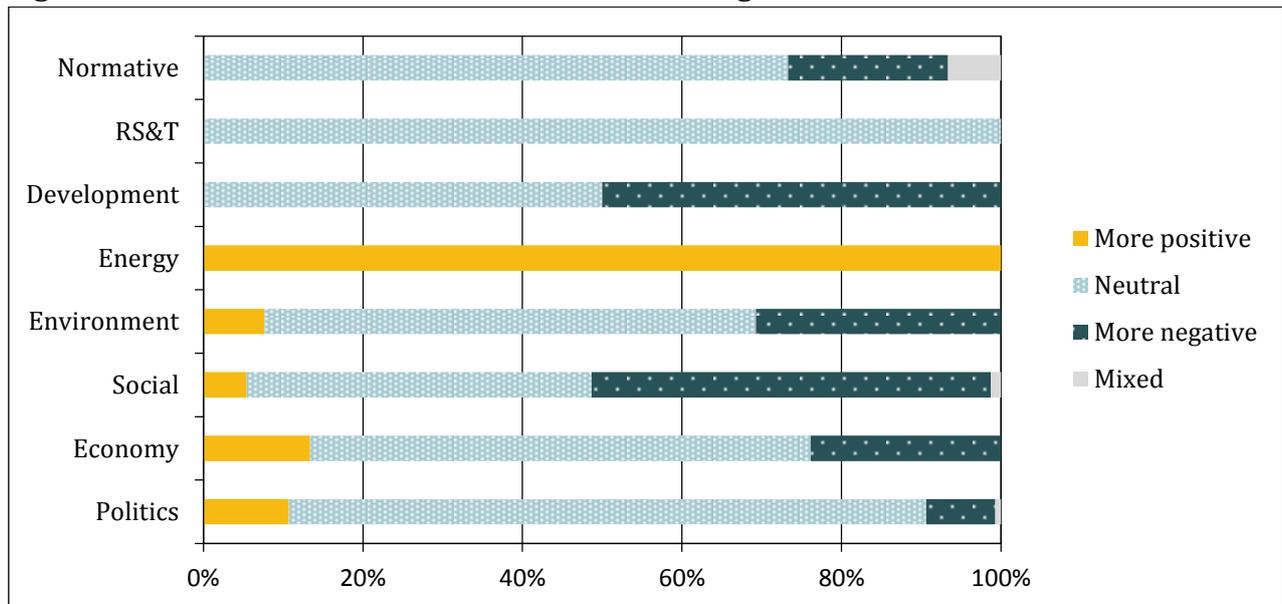
Elites demonstrated some knowledge of various EU development initiatives in Brazil, e.g. EU funding for IBASE’s campaign against hunger in the 1990s, EU funding for NGO SOS Corpo, EU funding for MIRIN (Model UN simulation organised by university students of PUC-Rio). However, elites also shared a muted perception about the EU’s development outreach to Brazil: ‘we see several EU development projects in Brazil, but there aren’t any results or we don’t have access to them’ (Youth, Secretary-General). Respondents affiliated with the NGOs recommended that the EU should pay more attention to civil society organisations in general, be more active in the area of human rights and help NGOs in poor communities.

Migration and multiculturalism

With social affairs of the EU being the third most visible theme, the EU’s reactions to the irregular **migration** in the Mediterranean occupied a prominently visible place in the EU’s *media* reporting. The EU was presented as an actor confronted by the refugee crisis but not coping well. In this particular case, the concept of ‘Europe’ was used synonymously to the concept ‘the EU’. In both datasets, negative connotations prevailed and topics of the challenged **multiculturalism** were highly visible (Figure 14). Brazilian dailies extensively reported about the challenges for the EU/ Europe to integrate migrants and fight ensuing

prejudices against migrants (especially of African descent), xenophobia, racism, Islamophobia, and persisting historical anti-Semitism. In this frame, Europe was presented by the newsmakers in a more negative light than the EU. Media reflected on European policies on migration, the problem of dealing with differences in the context of the migrant crisis, and the failure to integrate migrants. Access to the welfare state was seen in the news articles as being an exclusive right of Europeans since immigrants continue to be marginalised, and Europe was no longer framed by the news media as a synonym of solidarity and tolerance.

Figure 14. Evaluation of the EU and its actors according to thematic frames



Elites echoed the media frames and reported that the EU had a ‘positive image related to democracy, rights, social welfare state (the latter especially in contrast with the US approach), but [there is] threat to this image as welfare state is “under attack”.’ Elites expressed negative perceptions of the EU triggered by migration issues, right wing speeches and racism (especially in France). While one interviewee warned that it is ‘frightening for the Brazilian to observe issues of intolerance’, another sums up ‘now with this question of immigration and all the difficulties Europe is going through, its normative power is being harmed’ (Academic). Elites also used the case of irregular migration to draw comparisons with the US: the EU was assessed critically vis-à-vis the US who was ‘seen in better light.’ Another elite reiterated, ‘Despite its positive overall image, the EU is not seen as dealing well with immigration, in this case the US is seen in more positive terms.’ Comparison with the US is important as in the eyes of the interviewed stakeholders ‘for Brazil the EU can be a counterpoint to the US, [providing] an alternative agenda, more palatable. In Brazil there is a greater feeling of resistance vis-à-vis the US than the EU.’

Public opinion also seemed to echo these media messages. Results from the poll show that in Brazil the EU’s dealings with refugees (and displaced people) was seen as less positive when compared to the overall more positive evaluation of the EU’s performance in other fields. This area clearly stands out as the one that respondents were less likely to evaluate positively. The EU’s integration of migrants and refugees was also seen least positively among other areas of social development.

In terms of public opinion on internal social development, Brazilian respondents saw the EU as performing fairly well in social justice and solidarity (e.g. social rights, the public welfare

system). Furthermore, the EU's performance in overall quality of life is among the most positively evaluated areas of social development, slightly below only education.

Environment and energy

Oddly, media coverage was limited when it came to the matters of ***environment and energy***. This is despite the importance of the energy market in the Brazilian economy and the forthcoming COP21 climate conference in Paris. When covered, most of energy framing was in terms of *competitiveness*.

In the eyes of the *general public*, the EU's role in fighting global climate change and protecting the environment was seen as slightly less important than its role in maintaining global peace and stability. Nevertheless Brazilians felt that the EU performed better than all of the countries used for comparison. In Brazil, protection of the environment and the fight against climate change was not among the fields in which the EU was seen as standing out the most. Brazilians regard the EU's performance in green technologies lagging behind other economic activities and specific fields of technological development.

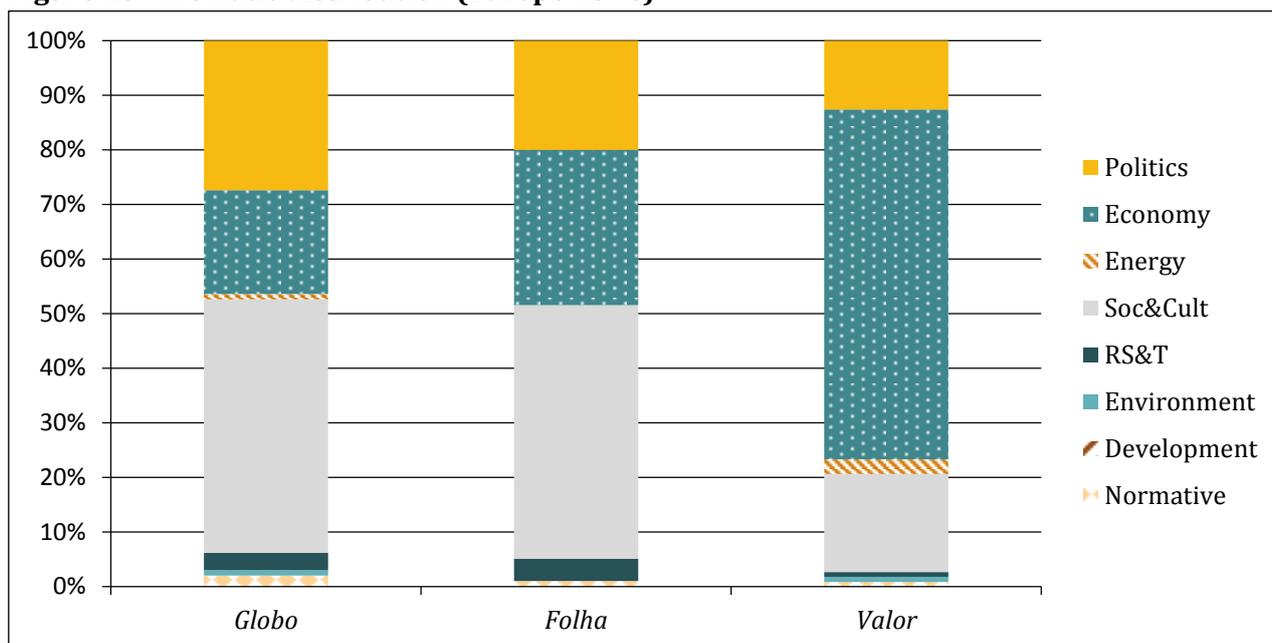
Research, science and technology

In the field of **research, science and technology**, Brazilian *public opinion* respondents saw the EU as lagging behind Japan, the US and China. Although they viewed the EU's importance in innovation and technological progress similarly to that in other areas, they saw rival countries as much more important than the EU in this field. Despite of the overall reservations towards the EU's global importance in this field, respondents felt the EU performed well in science and research and in various fields of technology.

Elites demonstrated knowledge of RS&T initiatives with EU Member States (rather than with the EU), e.g. the Brazil-Spain Board facilitating exchange of professionals as there is a lack of engineers in Brazil.

RS&T were not very popular *media* topics (see Figure 15). Just two articles dealt with the EU's RS&T (about scientific research on the brain and use of digital services by banks in EU Member States). In the 'Europe' dataset there were several articles on partnership between Brazil and Europe in the RS&T field, in particular the partnership with the European Southern Observatory as well as availability of Masters and PhDs scholarships for Brazilians in Europe.

Figure 15. Thematic distribution (Europe news)

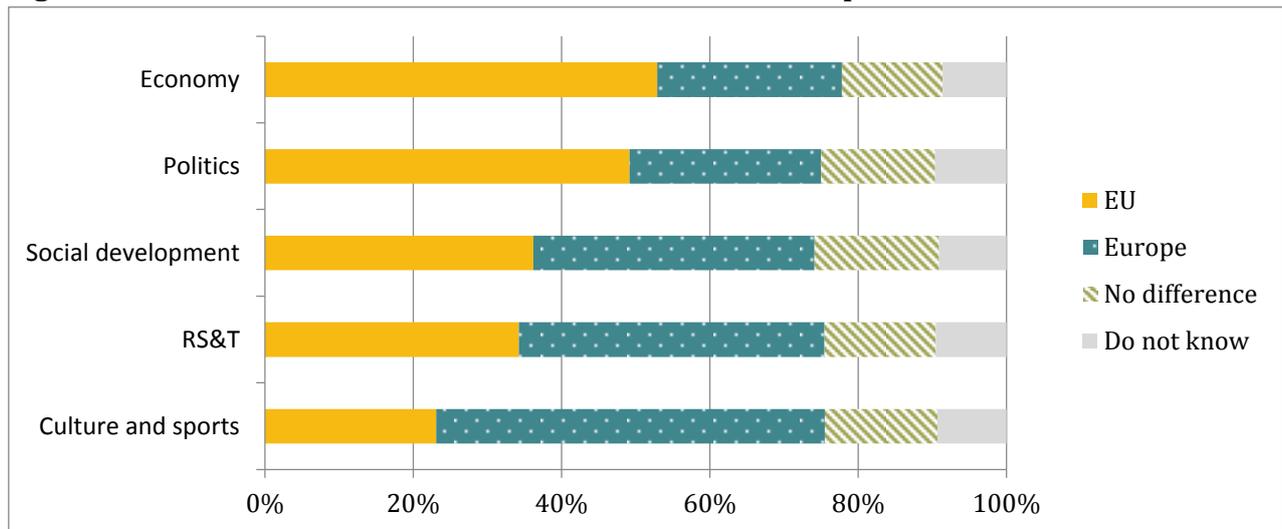


Culture

Cultural events supported by the EU in Brazil were mentioned by the *elites*, such as Europe Day (organised by FGV and Konrad Adenauer Stiftung and supported by the EU Delegation). Ad hoc support by Member States' embassies (UK, Netherlands) to events organised by CEBRI was also mentioned. Respondents favourably mentioned Member States' campaigns during year of the country programmes in Brazil (e.g. Year of France, Year of Germany, etc.). Interest towards the individual Member States in the area of culture expressed by elites was echoed by the *general public*. When compared to other countries, EU Member States were seen by the public as particularly attractive for their culture and lifestyle. Even though respondents evaluated all areas related to EU culture very positively, they were more likely to choose historical heritage, arts and lifestyle over sports, theatre and cinema, and music. These opinions are in line with those on the EU's performance in the entertainment industry, which is evaluated less positively compared to other economic activities. Respondents tended to agree less often with the statement that Europe is a producer of music and arts popular in Brazil.

In terms of how respondents differentiate EU and Europe, culture and sports as well as research, science and technology were associated first and foremost with the term Europe, whereas economy and politics were firstly associated with the EU (Figure 16).

Figure 16. Association of different areas to the EU versus Europe



Note: Based on the answers to Q23: 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 = 1210)

Yet, some *elites* warned that cultural affinity is now shifting more toward the US. Younger generations ‘go there, they see it, they travel. ... Everything is clean, perfect politics, things function smoothly, shopping is cheap because there are less taxes.’ (Policymaker, Coordinator of Trade Negotiations). However, the younger generations were also more critical of the EU’s sense of superiority and arrogance (Group Interview).

Education

Interviewed *elites* share a view that Europe is ‘always seen as a model of education, health system, social security. This is something from the present, not from the past’ (Policymaker, Coordinator of Cooperation with Europe). Yet, *media* reflections on topics of education in the EU/ Europe and education exchanges with the EU were marginal.

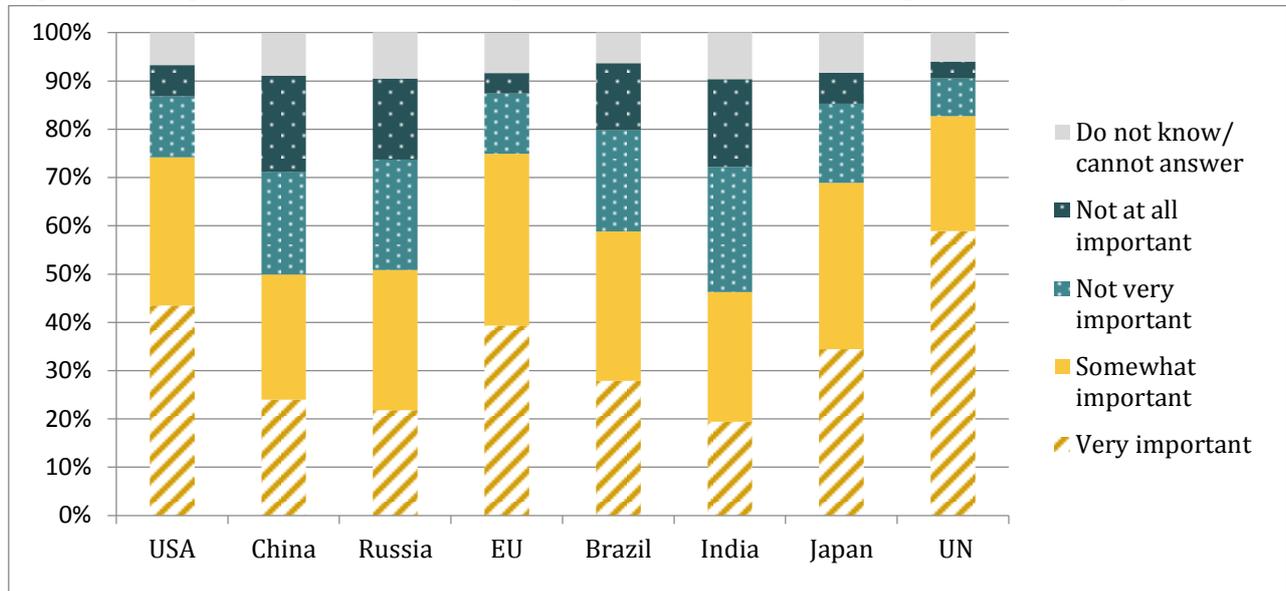
In the eyes of the interviewed *elites*, **education** was the field where a plethora of contacts between the EU and Brazil take place and where there was potential to grow true collaboration. Reflecting the cohort selected for interview, elites assessed a range of programmes that ‘span from curriculum changes to the student mobility issues’ (elites listed the Institute for Studies Brazil-Europe; European Union Visitors Programme (EUVP); Partnerships between Member States’ universities and CAPES (Coordination for the Improvement of Higher Education Personnel), Jean Monnet; Joint Research Center NANOREG; FP7, Horizon2020). Unsurprisingly, these programmes were ‘widely discussed within the academic environment’ as was the Bologna process. As a point of difference for some elites, France was particularly associated with education. *Public opinion* viewed the EU particularly positively in terms of the education level of its population, the area of social development where the EU performs best. The general public also acknowledged the importance of the EU in educational exchanges, yet paradoxically, the Erasmus programme was among the least visible images describing the EU listed in this survey question.

The EU as a norm-setter

Public opinion in Brazil acknowledges the EU’s performance in the field of promoting and defending human rights worldwide. In this field, the UN is perceived to be the most

important actor, followed by the EU and the US (see Figure 17). Respondents also evaluated the EU's performance in gender equality as the most positive among other human rights related issues listed in this survey question.

Figure 17. Importance of EU, other organizations and countries in global human rights



Note: Based on the answers to survey Q10: In your view, how important a role do each of the following countries or organisations play in promoting and defending human rights worldwide to protect human dignity, freedom, equality and solidarity? (N = 1210)

Elites echoed this vision recognising the power of norms and values coming from Europe – ‘democracy, human rights, the way we see those things comes mostly from Europeans’ (think tank, director). *Elites* also admitted some parallels between the EU and Brazil when it comes to challenges: ‘Brazil and the EU have the same targets [but they] differ on how to reach them – both want respect for human rights, but the EU has problems with immigrants, and Brazil with indigenous communities.’

However, commenting on a broader normative identity of the EU, *elites* noted that the EU's determination to ‘project its values and norms’ is seen in Brazil as ‘problematic because diffusion of norms and dialogues are one-way.’ Such ‘excessive will of the EU’ and ‘vertical relationship is a problem.’ Moreover, elites argued that ‘the EU does not listen to other countries; it propagates norms but won't receive other countries' norms. Dialogues sound like pressure. EU has a hearing problem.’ This top-down approach to the dialogue with Brazil received critical reception in the eyes of elites: ‘some norms, rules and regimes that the EU tries to implement are controversial, and resisted by Brazil, such as the inclusion of security dimension in the SDGs, the idea of common but differentiated responsibilities in climate change negotiations, the issue of food security, nuclear non-proliferation and the acceptance of the additional protocol.’

Media also recognized and communicated the EU as a promoter of norms globally and regionally. For example, the EU's messages on democracy in its dealings with Venezuela were widely reported. When reporting ‘Europe’ the press in Brazil associated Europe with the norms of anti-discrimination, good governance and democracy. In the Brazilian media, it was the democratic systems in Europe – usually compared to the electoral system in Brazil – that attracted media interest. Practices of private financing for political campaigns, the rise

of far right parties and new leftist social movements and political parties were the focus of Europe coverage. Yet, normative reportage in Brazil was very limited in scope.

3.1.4 Local conditions: explaining the perception of the EU in Brazil

Perceptions are a result of interactions between internal (Brazil-specific) and external (EU-specific and global) factors. One explanation of the EU/ Europe perceptions stems from the emerging self-visions of Brazil. Brazil's own image is of a country with an autonomist identity. It sees itself as an increasingly confident 'rising' power who is becoming more and more relevant on the world stage being able to influence normative discourses. At the same time, Brazil sees the EU having a 'hearing' problem refusing to accept Other's norms and values. Thus, one source of images is the perceived conflict between the EU as an arrogant norm-setter who presents itself as *the* model (despite ensuing crises) and increasingly confident Brazil that sees itself as a norm-sender and norm-shaper on its own right. Importantly for Public Diplomacy, the study revealed a perception of cultural affinity and resonance, and within that, a vision that Brazil is 'embedded in European values.' As such, resonating normative visions – rather than clashing ones – should be used to inform EU Public Diplomacy messages. These are seen as true facilitators of the respectful 'normative' dialogue between Brazil and the EU. Future studies of EU perceptions in Brazil could focus on normative images of the EU vis-à-vis Brazil's self-images with images and perceptions being one powerful 'cultural filter' in the normative dialogue.

The study also revealed that some historical legacies are not gone. Elite interviews featured repeated reassurances that colonialism and imperialism is 'not an issue' for the EU-Brazil relations and that 'the EU seen as having abdicated from its (sic!) colonial past.' In contrast, media analysis explicated that Europe was frequently associated with domination and exploitation, with references to colonial past, and such frames were presented in the negative light. Moreover, these perceptions are fed by internal predispositions – according to the local elites, 'Brazilians have internalized colonial mentalities and attitudes.' As such cooperation between Brazil and the EU, including Public Diplomacy outreach, will remain challenged by this ambiguous vision as Europe is indeed often used as a synonym to the EU (even by the EU itself). In this light, for EU Public Diplomacy in Brazil it is important to differentiate between the concepts 'EU' and 'Europe' and use them with caution. In Brazilian *public opinion*, such areas as economy and politics were first and foremost associated with the EU, whereas culture, sports and science were mostly associated with Europe. This would suggest that in Brazil the EU is mostly seen as an economic and political union. Importantly, Europe was used as a synonym of the EU mostly in the context of immigration and economic/ Greek crisis and, very frequently, it was evaluated negatively. Future studies of EU perceptions in Brazil should look into a systematic study of identity-shaping discourses (e.g. secondary and tertiary levels text books) in relation to the colonialism legacy and trace Europe's images in them.

Finally, it is important to remember that there is no 'single Brazilian perception.' Local elites proposed to differentiate according to the level of education, personal background (such as being European descendent), region in Brazil where the person comes from/ lives, as well as age (older people are seen to be more oriented towards Europe while younger towards the US). Future studies of EU/ Europe perceptions in Brazil could dedicate a focused attention to different regions and scope visions across generations.

Among the local partners open for collaboration with the EU mentioned by the interviewed elites were academic institutions (La Universidad del Estado de Río de Janeiro (UERJ), IRI

(International Relations Institute at PUC-Rio), Fundação Getúlio Vargas and the Research Foundation of the State of Rio de Janeiro (FAPERJUSP). The respondents also mentioned that in principle, non-governmental organisations and media were seen as more open for contacts with the EU. Respondents saw the need for the EU to pay more attention to civil society organisations in general, and increase its interactions with the NGOs in the area of human rights specifically. Greater EU help to NGOs in poor communities was also requested. Among potential partners for the EU's Public Diplomacy the respondent listed such NGOs as FASE, Viva Rio or SOS Mata Atlântica in the environmental sector, as well as several international NGOs (WWF, Greenpeace, Red Cross, Doctors without Borders, Amnesty International). Media reportage presented a limited set of Brazilian actors who were seen to already interact with the EU. Among those, the most visible were Brazilian President Dilma Rousseff; Minister of Agriculture Katia Abreu; Minister of Development, Industry and Trade Armando Monteiro; Brazilian Minister of Foreign Affairs Mauro Vieira; Luigi Gambardella, President of EU-Brazil Association; Mangabeira Unger, Brazilian Minister of Strategic Affairs; Joaquim Levy, Minister of Finance; Secex (Secretaria de Comércio exterior); Roberto Azevêdo, Director-General of the WTO; Felipe Hees, President of the WTO committee for Sanitary and phytosanitary measures.

3.1.5 Recommendations for EU Public Diplomacy

In the eyes of the Brazilian general public, the EU is among the most positively viewed international actors (below only Japan and the US), and at the same time is rarely seen as negative. Respondents with mostly positive attitudes towards the EU accounted for 53 per cent of the population and nine per cent had very positive attitudes towards the EU. Compared to other international organisations, respondents evaluated the EU more positively than all other organisations except the UN. The EU was most commonly described by the general public as strong, efficient and multicultural and modern; and least often described as aggressive, hypocritical and peaceful. Such positive images of the EU amongst the general public constitute a solid base for EU Public Diplomacy outreach. Despite the crises, the general public perceives the EU favourably. However, analysis explicated that there is a dichotomy between younger and older members of the general public. Regression analysis of the public opinion findings showed that the likelihood of respondent having a positive overall view of the EU was somewhat higher for those from the higher age cohort. Similarly, higher age was also positively correlated with expressing a positive opinion about the relationship between Brazil and the EU. This finding suggests that EU Public Diplomacy should invest into targeting the younger generation in Brazil (and use appropriate and appealing mechanisms).

A general positive view of Europe, not least due to cultural aspects and living standards, was also noted among the elites. Elites' negative views often came when the EU shows a lack of interest to accommodate demands from Brazilian partners and to hear their interests. While the EU is seen as efficient in strategic planning, is seen by the local elites but a 'bit too assertive', channelling 'colonial attitude'. One recommendation for EU Public Diplomacy is to identify and map the local interpretation of 'assertive' behaviour and inform EU diplomats and negotiators on the boundaries of the concept.

While the EU/ Europe garners a share of negative images in the field of economy and social (migration/ multiculturalism) affairs, Europe/ EU images enjoy highly positive recognition when it comes to its welfare and high social protection level, as well as education. Media and elite findings demonstrate that the European model of development is usually considered preferable to that of the United States, particularly with regards to welfare (despite the

Eurozone crisis). Education is seen as one of the best achievements of this welfare system. Public Diplomacy could prioritise these two areas to boost the EU's profile among tertiary education and civil society stakeholders who are very interested and already highly involved in discussions within the country.

Democracy, development, technology, innovation and environment remain topics of some contention. An intensified honest dialogue initiated by top experts and politicians from the EU, on equal footing (not top-down), demonstrating sincere listening is recommended. Finally, the EU was seen as having achieved a high standard of living, yet lacked coherence in the question of immigration. This was seen as the greatest test for the EU. Here, EU Public Diplomacy could initiate an open conversation in which the EU demonstrates it is willing to learn from Brazil, a multicultural society on its own right. To sum up, EU Public Diplomacy in Brazil could gain from stratified dialogues with a range of objectives – from sharing successes of the model, to honest debate and request/ desire to learn from the others.

This study also revealed that in some areas of collaboration that come with EU support, the framework of EU tenders was seen by local elites as mechanical, bureaucratic, and obsessed with measurable results even in areas where this is not possible or recommended. The complexity of EU tendering processes is such that even consultants need to be hired to help prepare the applications. EU programmes are sometimes seen to be wasted on initiatives that bear little result. Many projects depend on individual points of contact. One possible solution is to prioritise inter-institutional collaboration which will depend less on individual persons and more on collaboration among experts – which are often few. Many projects are designed with a rationale 'one size fits all'. Here, Public Diplomacy could gain from extensive consultation with the local experts when designing outreach programmes. Once again listening to the Brazilian side would ensure an equal participation of the latter in the dialogue. Many EU initiatives remain not well-known, although their visibility is improving since the strategic partnership was established in 2007. The EU Delegation is seen as an active actor in this regard. As such information dissemination activities by the EU Delegation must be supported and boosted. In addition, the fact that Brazil is no longer directly eligible to receive funding from the European Commission (Horizon 2020) hinders bilateral cooperation and can prevent Brazil from taking part in multilateral cooperation projects. Brazil might have strong macroeconomic indicators but it has severe shortage of funds, knowledge and technology in several key areas.

Relations between Brazil and the EU/ Europe were not very significant in media representations. Such relations were mentioned only when the EU/ Europe related to Brazil's economic context and particularly to trade. Regionally, MERCOSUR and Venezuela are more often mentioned in news related to Europe. Beyond trade relations, deeper and more diverse connections between Brazil and Europe are missing in the news. Brazilian media demonstrated a relatively high share of news about the EU coming from international sources. This suggests some open attitudes among newsmakers to take into account external views. EU Public Diplomacy should design a pro-active outreach towards Brazilian newsmakers delivering newsworthy information about diverse facets of EU-Brazil collaboration.

Recommendations for EU Public Diplomacy from practitioners on the ground in Brazil

From the perspective of practitioners at the EU Delegation on the ground there are several areas where EU Public Diplomacy should concentrate its efforts. Firstly, practitioners stressed that since Brazil is a very large country with diverse publics, media and infrastructural conditions, a focus on the distribution of information via a) social media and

b) radio will positively affect the outreach activities. A more diverse geography of EU missions is another recommendation – in order to broaden the activity scope, a mission in Sao Paulo can positively impact the outreach. In the eyes of the practitioners, enhanced cooperation in areas of common interest, such as economy and trade, will have a positive impact on EU-Brazil relations. Finally, in order to reach a broader audience, the EU and Brazil should nurture collaborations on ‘global challenges’, i.e. issues related to environment protection and climate change.

3.2 Canada

This Country Chapter presents a synthesis of the Canada-specific findings of media analysis; elite interviews 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 Canada according to the research criteria applied – namely visibility; actorness and local resonance; and norm-setter. Moreover, in the section on actorness and local resonance, we discuss these according to the themes analysed in this research: economy and trade; politics and security; normative and human rights; development – including the social internal and international dimensions; migration, multiculturalism and human rights; environment and energy; science, research and technology; culture; and education. The final section before policy recommendations looks at the local conditions that explain the perception of the EU in Canada. Finally, we conclude the chapter with recommendations for Public Diplomacy, including a subsection on recommendations in the eyes of the EU Delegation to Ottawa.

3.2.1 Sample

Public opinion

The online omnibus survey was coordinated and analysed by the Public Policy and Management Institute (PPMI) and conducted by TNS Global. The respondents in Canada were surveyed in English and French. Data collection took place in August 2015. The online omnibus survey was designed to be nationally representative with regards to age, gender and region. The survey covered a total sample of 1,022 individuals within the 16-64 age group.

Media

The media content analysis was designed, supervised and coordinated by the National Centre for Research on Europe (NCRE), University of Canterbury, New Zealand, and conducted by local researchers trained by the NCRE. Three popular prestigious papers: *The Globe and Mail*, *National Post* (both in English) and *La Presse* (in French) were monitored daily between April 1 – June 30 2015 using e-search engines Press Display and Eureka (for *La Presse*) to ensure high accuracy in data collection. Two separate datasets were collected over the period of observation – ‘EU’ (598 articles) and ‘Europe’ (694 articles). Key search terms for dataset ‘EU’ included (with acronyms) ‘The European Union’, ‘The European Commission’, ‘European Parliament’, ‘European Court of Justice’, ‘European Central Bank’, ‘European Presidency’, ‘Council of the European Union’, ‘Eurozone’. The key search terms for dataset ‘Europe’ were ‘Europe’ and ‘European’.

Elite opinion

The NFG coordinated the interview programme and designed the questionnaires in close coordination with the Country Experts and the project partners. The NFG was also responsible for the training of the Country Experts and supervision of the implementation of the interviews. The interviews itself were conducted by the Country Experts. Interviews have been conducted as a source to identify upcoming trends and to cross-check findings. They are non-representative due to their current scope and should be considered as a tool for future evaluations in a representative volume. The NFG chose a three-phased approach: in Phase I, two transcripts were due until June 6; in Phase II, five interviews were due until July 15; and in Phase III, five interviews were due until August 17. The NFG was in charge for the coding of the transcripts and the provision of the results to the project partners.

Interviews in Canada were conducted in English and French, and translated and transcribed by the country expert. He interviewed 12 experts (Policy-maker (3), Academia/ Think Tank (3), Media (1), Civil Society/ NGOs (2), Business (2), Youth (1)) and held one group interview with three representatives from Academia/ Youth (one MA student, one BA student, one Associate Professor from Carleton University).

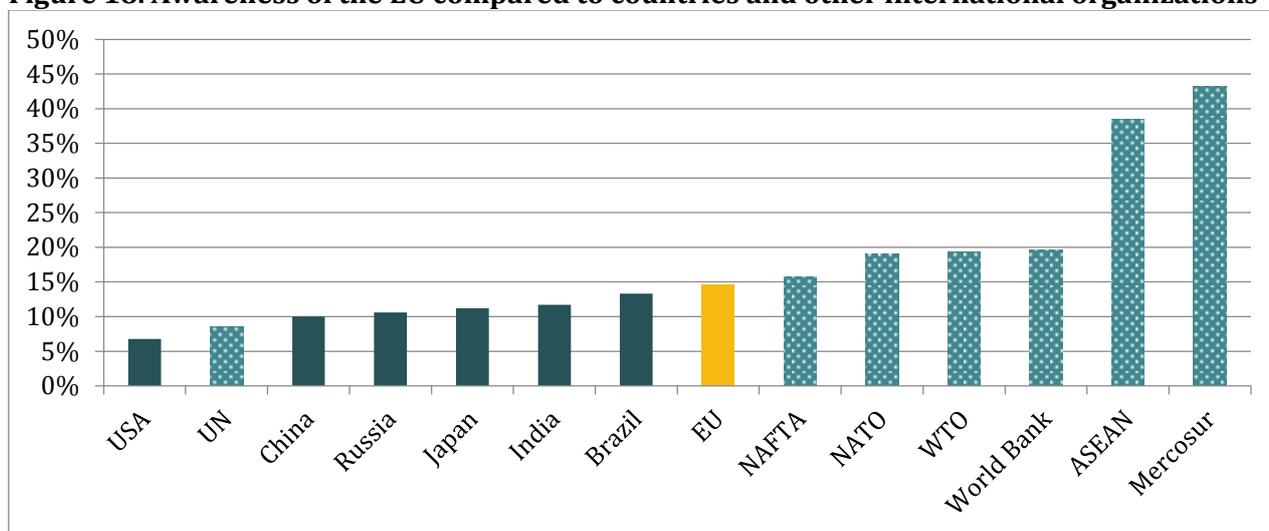
Semi-structured, anonymous qualitative interviews under Chatham House Rules were conducted with all EU Delegations across the 10 Strategic Partner countries, primarily in the form of a group interview. The groups included Heads/ Deputy Heads of Delegations, Heads of Press and Information Section and/ or Heads of Political Affairs Section. Interviews lasted between 60 to 90 minutes. In Canada, one diplomat was interviewed.

NB: two robust datasets collected in the course of public opinion survey and media monitoring allow for quantitative and qualitative analysis of data (for more detailed information, please see attached country-specific media and public opinion reports). Survey of elite opinion is impressionistic due to small numbers of the interviews. Data collected is analysed using qualitative approach.

3.2.2 Visibility

The Canadian public opinion survey results demonstrate that the EU's **visibility** was somewhat below that of the countries used for comparison (see Figure 18), and while it was more visible than most other international organisations, the UN had a relatively higher visibility and the EU was ranked similarly to the WTO and IMF.

Figure 18. Awareness of the EU compared to countries and other international organizations



Note: Based on the answers of option 'Do not know/ cannot answer' to survey Q1: Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations? (N = 1022)

Media representations provide evidence on how the Canadian public perceives the EU. In terms of overall visibility, the three chosen papers published a substantial volume of articles that mention the EU (598 over three months) and on Europe (694 articles). It is slightly higher than averages in this study – volume across 10 countries is 505 for the EU dataset and 635 for Europe. Volume is only one indicator of EU/ Europe media visibility, and a more nuanced analysis revealed a pattern of *nominal visibility* of the concepts. Articles that dealt with the EU were typically medium in length, assigning the EU a low degree of centrality, with limited visual support, and placed mostly in business sections rather than generally

throughout the paper (see Figure 19). Importantly, the coverage focused on events that were cyclical (e.g. the UK election) or unusual/ atypical/ scandalous (e.g. the Greek economic crisis, the migrant crisis, Grexit and Brexit). Less attention to structural matters in framing the EU suggests that the level of media attention might not be constant over a longer period of time. The framing of Europe was even more diluted, with articles being longer, and references to Europe being minor in the overwhelming majority of articles (see Figure 20).

Figure 19. Degree of centrality (EU news)

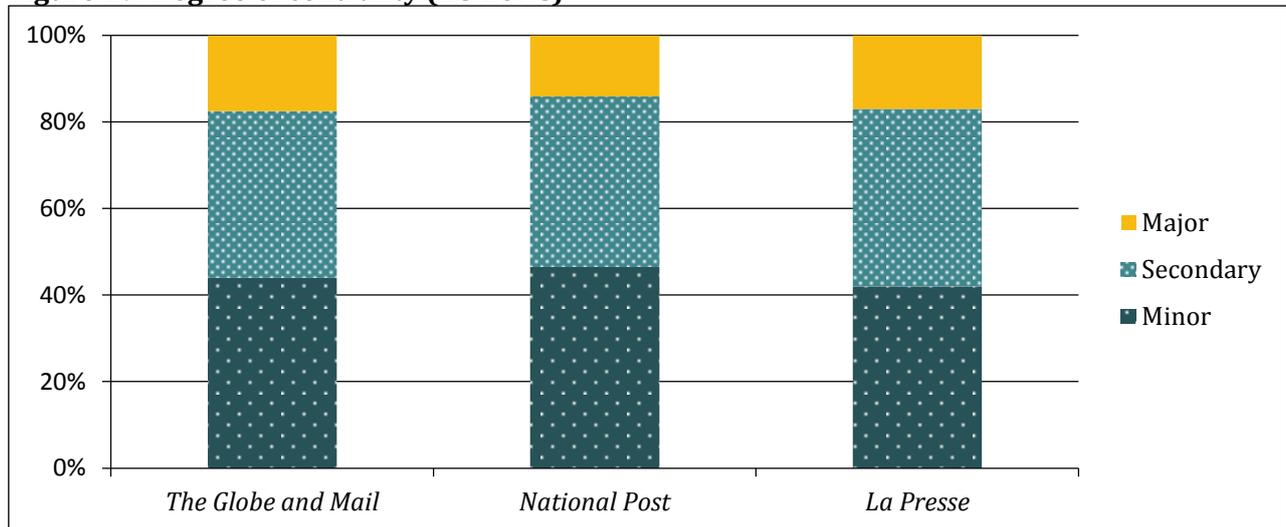
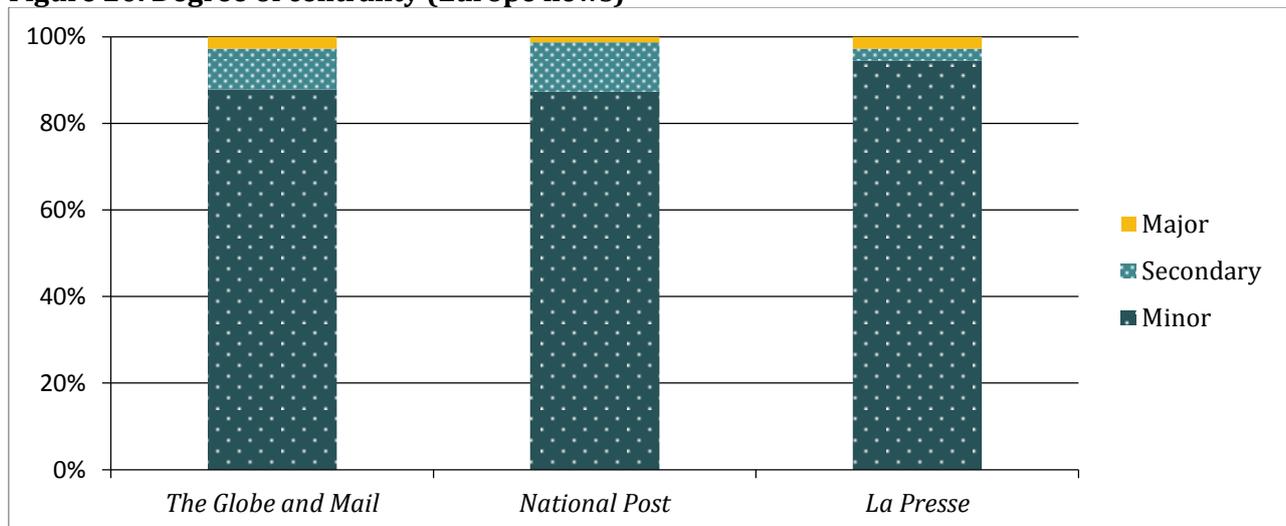


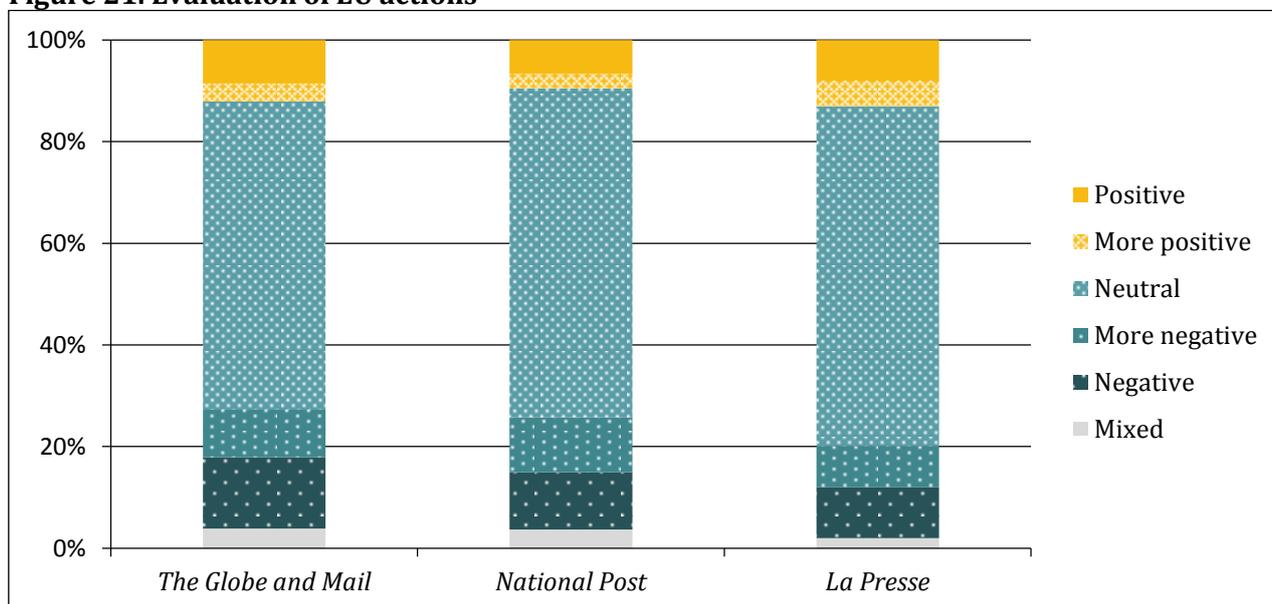
Figure 20. Degree of centrality (Europe news)



Of the EU institutions, the European Central Bank (ECB) was by far the most cited one, usually in reference to the Greek crisis or Eurozone stimulus policies. Consequently, ECB President Mario Draghi appeared more often than any other EU official in the Canadian press. The European Commission and Jean-Claude Juncker received quite a lot of attention with most of reports about him coming in June as the Greek crisis took a more high-level political turn. Federica Mogherini received most of her mentions around the Mediterranean migrant crisis, and to a lesser extent in relation to the nuclear talks with Iran. Greece, its Prime Minister Alexis Tsipras and Finance Minister Yanis Varoufakis, top the list of the most mentioned Member State and Member State officials. Other Member States and officials that gained media attention were Germany, the UK and France, and their respective heads of government. It should be noted however that they were not mentioned in the same context.

Germany and France were reported within the Greek crisis. In contrast, with the UK not a member of the Eurozone, the UK and its leaders were totally absent from articles on the Greek crisis. The UK and Cameron were mentioned in the context of the UK election. Other EU Member States received only marginal media interest. The general evaluation was that EU reporting was neutral in tone (Figure 21).

Figure 21. Evaluation of EU actions



3.2.3 Actorness and local resonance

The EU as a local partner

Overall, Canadian *elites* registered positive and promising perceptions of the EU as a **partner** for Canada and were aware of the EU-Canada strategic partnership. This translated to the perceptions of similar priorities (e.g. transatlantic security, trade), similar political structures, and similar desires to not ‘flex their muscles’ in their dialogue and be multilateral partners instead. The stakeholders also saw the EU building ‘more of a personality’ on international issues, starting with Schengen.

The Canadian *public* echoed this opinion seeing the EU as an important and trustworthy **partner** for Canada in international relations. A Canadian think tank expert explained, ‘Historically, but not only historically, economically, military, from all perspectives, the US was the one we have to follow.’ For the elite respondents, the US ‘comes into play for almost every issue (e.g. energy, multilateralism, Arctic, trade...)(there is however, a regional dimension with Quebec’s particularism, as it is more anti-US than the rest of Canada). Other interviewed elites echoed with the sentiment that Europe will remain ‘number 2’ for Canada for the foreseeable future, as both partners are recognized as sharing ‘very strong connections on all levels (economic, military, cultural).’ Of interest is a public opinion view that saw Canada’s relationship with the EU more positively than when asked to evaluate the EU in general, which suggest some recognition and positive evaluation of the EU-Canada partnership.

Media delivered a particular profile of the EU as a **partner**. There was a low level of EU news reporting the Union’s interactions with Canada (under 20 per cent of the total sample) in contrast with a high level of EU coverage in the EU and/ or in the context of individual EU Member States (Figure 22). The combination of low local focus and high external focus

suggests that the EU is framed by the press as an actor who acts far away, lacking in clear link/ impact/ relevance to Canada. A high share of EU news reported the EU through international sources (Figure 23).

Figure 22. EU News ‘with local hook’ vs. news without it

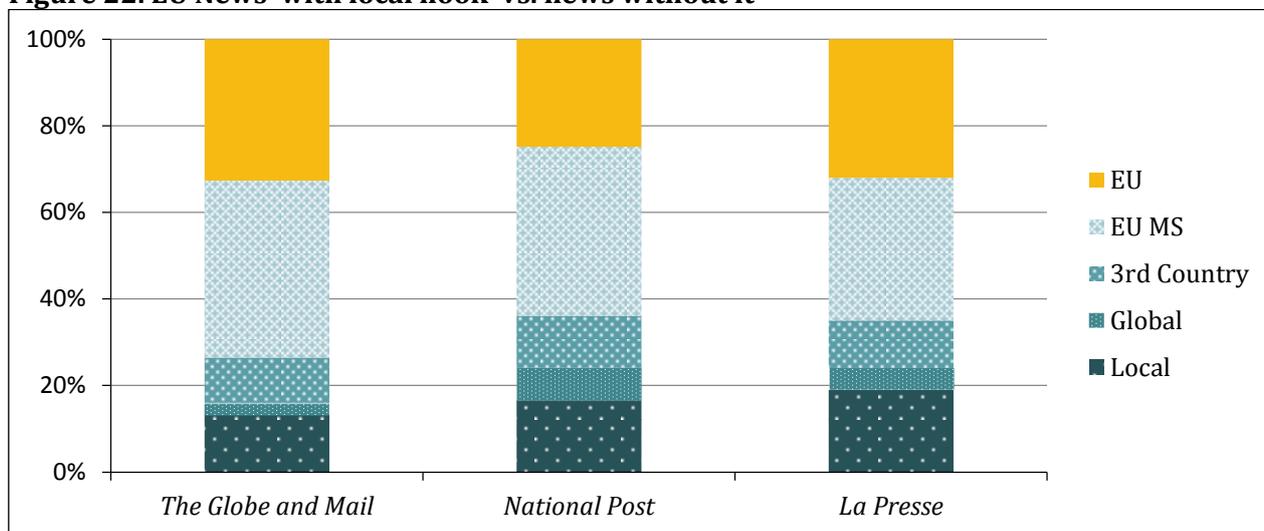
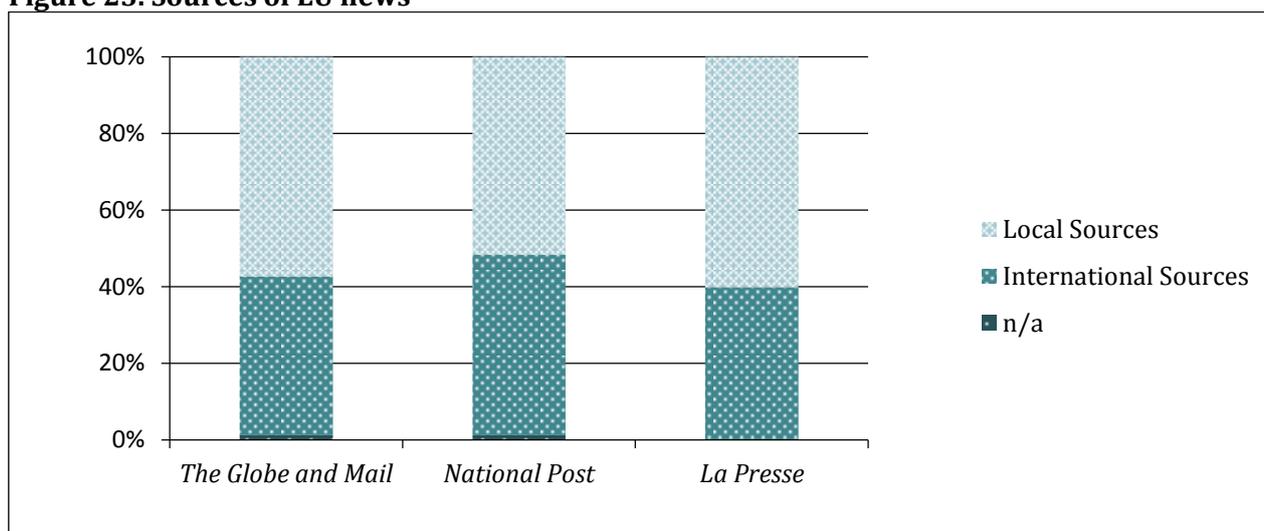


Figure 23. Sources of EU news

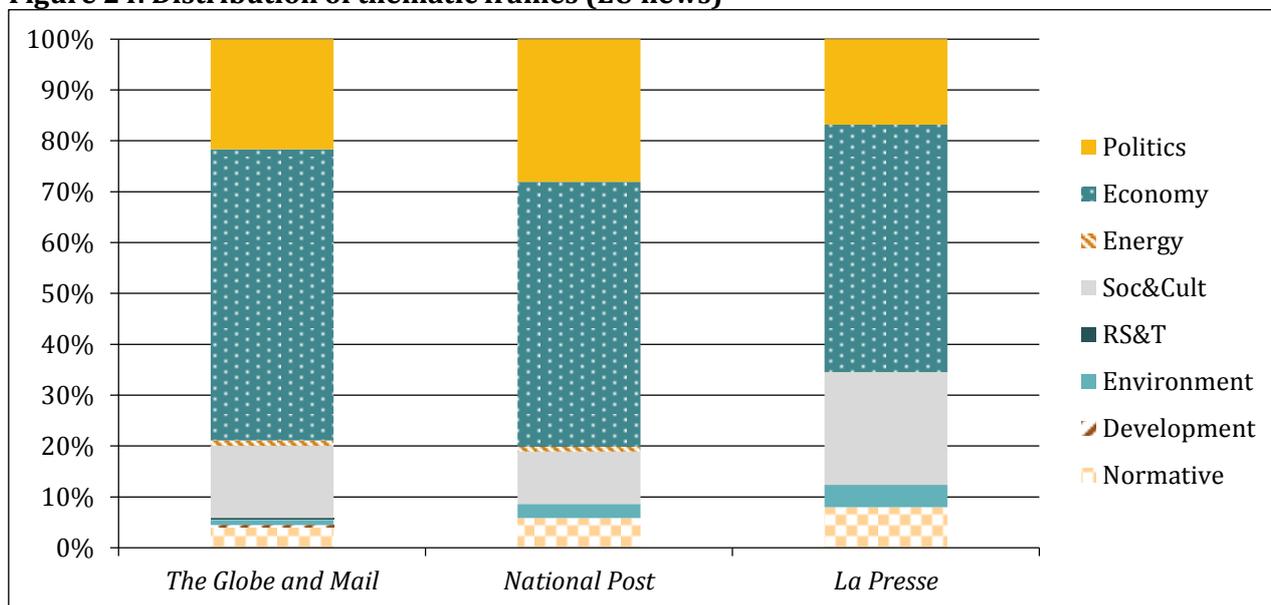


Economy and trade

The three dailies analysed predominantly reported the EU in **economic** terms (Figure 24). The EU was most frequently framed as an entity whose state of economy had been adversely affected by the Greek crisis. Indeed, the press was inundated with reports of the Greek economic crisis with negative evaluations assigned to EU actions – the image of the EU as an economically sick man fearing contagion from Greece and other fragile Member States and potentially contagious to the world was one such visible profile in the economic coverage of the EU. The crisis was followed daily in the business sections of the popular papers (typically read by business elites and policy makers). The EU’s most visible institution in *media* was the ECB. Its leader Mario Draghi was the most visible EU face. Greece and Germany were the most visible EU Member States, again due to the crisis context. The thematic representation of ‘economy’ remained the most important frame the ‘Europe’ dataset. However, while ‘state of economy’ was the most visible EU economy theme, ‘business and finance’ led in the

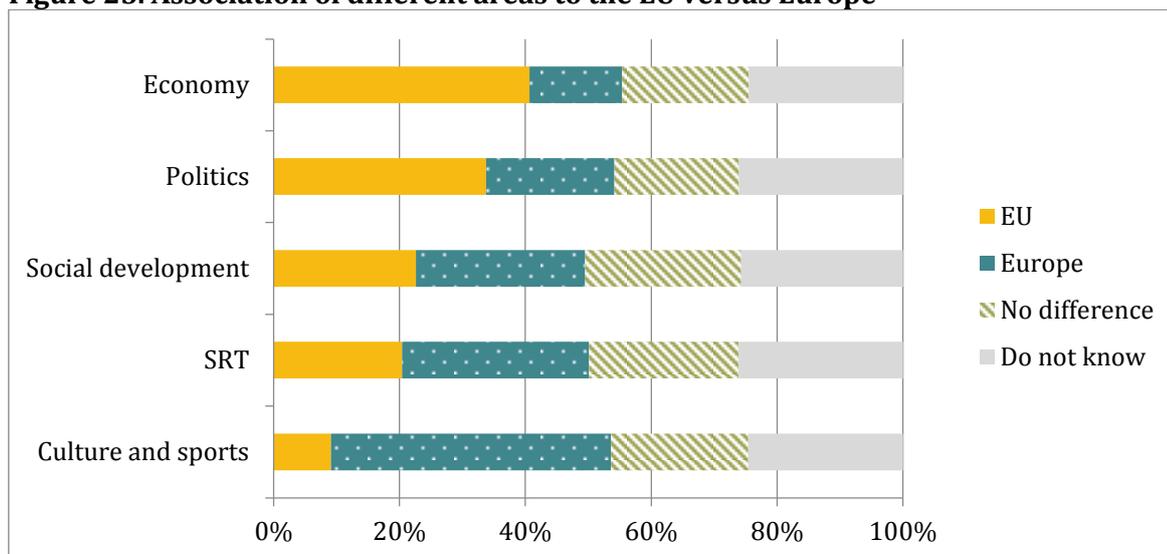
framing of Europe’s economic activities. Such reportage dealt with companies doing business in Europe, the state of the European financial market, Europe’s oil market and the EU-Canada free-trade negotiations, all topics of significance to Canadian businesses.

Figure 24. Distribution of thematic frames (EU news)



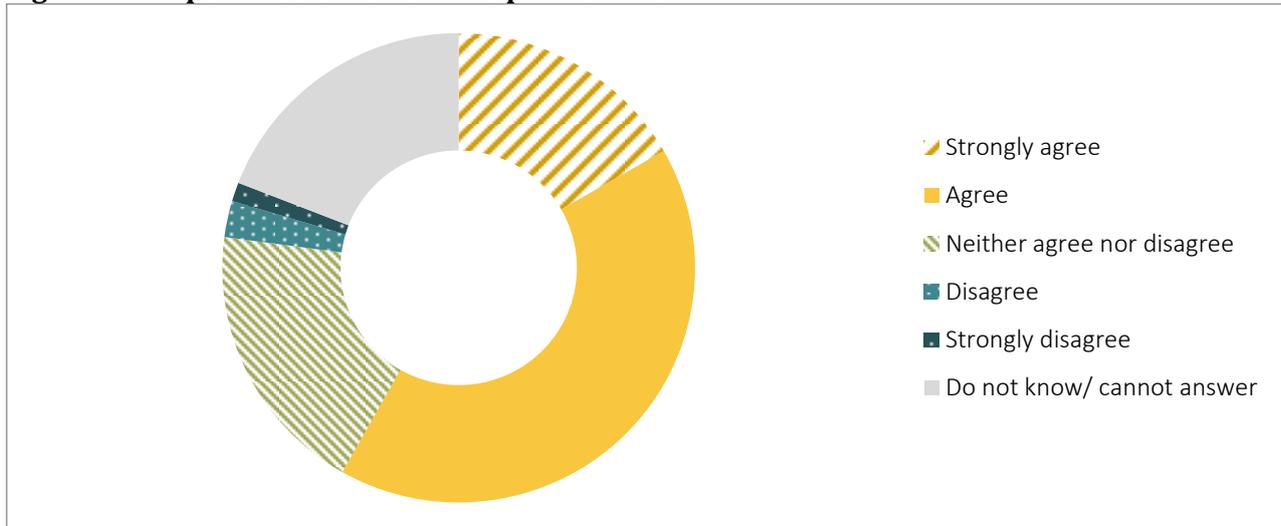
The Canadian public overwhelmingly associates the EU (40.7 per cent) over Europe (14.7 per cent) to economy (see Figure 25). The ECB was the most visible EU actor in the eyes of the public. The *general public* perceived the EU performing fairly well in global **trade**. It was widely accepted that the EU was an important trade partner (Figure 26) and foreign investor for Canada, and the importance of the EU in educational exchanges was acknowledged. In global economic affairs, when compared with other actors, respondents see the EU lagging behind the US and China, with influence perceived to be similar to that of the WTO (see Figure 27).

Figure 25. Association of different areas to the EU versus Europe



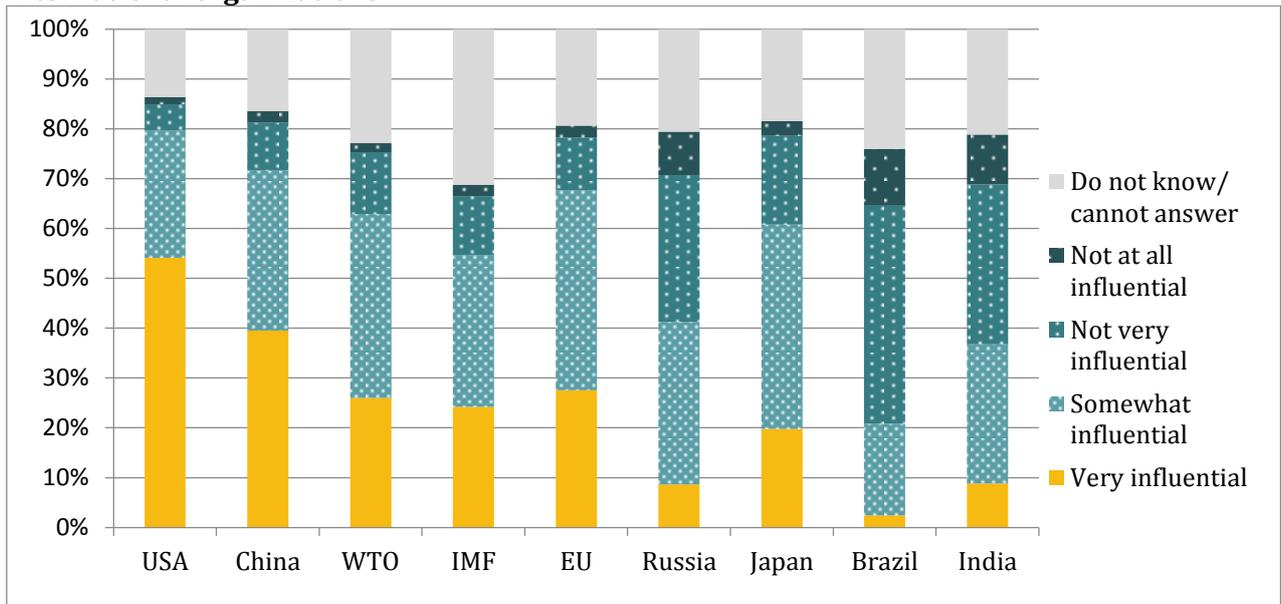
Note: Based on the answers to Q23: Some people think about Europe, whereas others think about the European Union when talking about economy, politics, culture, sports and other areas. In your case, which term – Europe or the European Union - comes to your mind first when you think about the following subjects? (N = 1022)

Figure 26. Importance of EU as trade partner in China



Note: Based on the answers to survey Q14: Looking from Canada’s perspective, how strongly do you agree or disagree with each of the following statements about the economic relations with the European Union? The European Union is an important trade partner with Canada (N = 1022)

Figure 27. EU’s influence in global economic affairs compared with countries and other international organizations



Note: Based on the answers to survey Q6: In your view, how influential in global economic affairs are the following countries and organizations? (N=1022)

A leading perception among Canadian *elites* was the EU as a **trading actor**. In general, there was recognition that EU trade policy impacted on trade policy development globally and it was being followed from within Canada. The EU was perceived as a ‘large trading power [who] influences negotiations, bilateral, multilateral...’ (Group Interview, think tank). The EU as a **trading partner** was the leading perception when EU-Canada relations were discussed. A strong cohesive EU was seen by the Canadian elites as paramount for bilateral trade deals within the Comprehensive Economic and Trade Agreement (CETA) (with a special focus on CETA’s implications for small and medium businesses). CETA was seen by some elites as less controversial than other free trade negotiations involving Canada, such as NAFTA or TPP (Trans-Pacific Partnership) (involving the US and where there is a perception of much more being at stake economically for Canada). Importantly, the EU as a trading partner was not

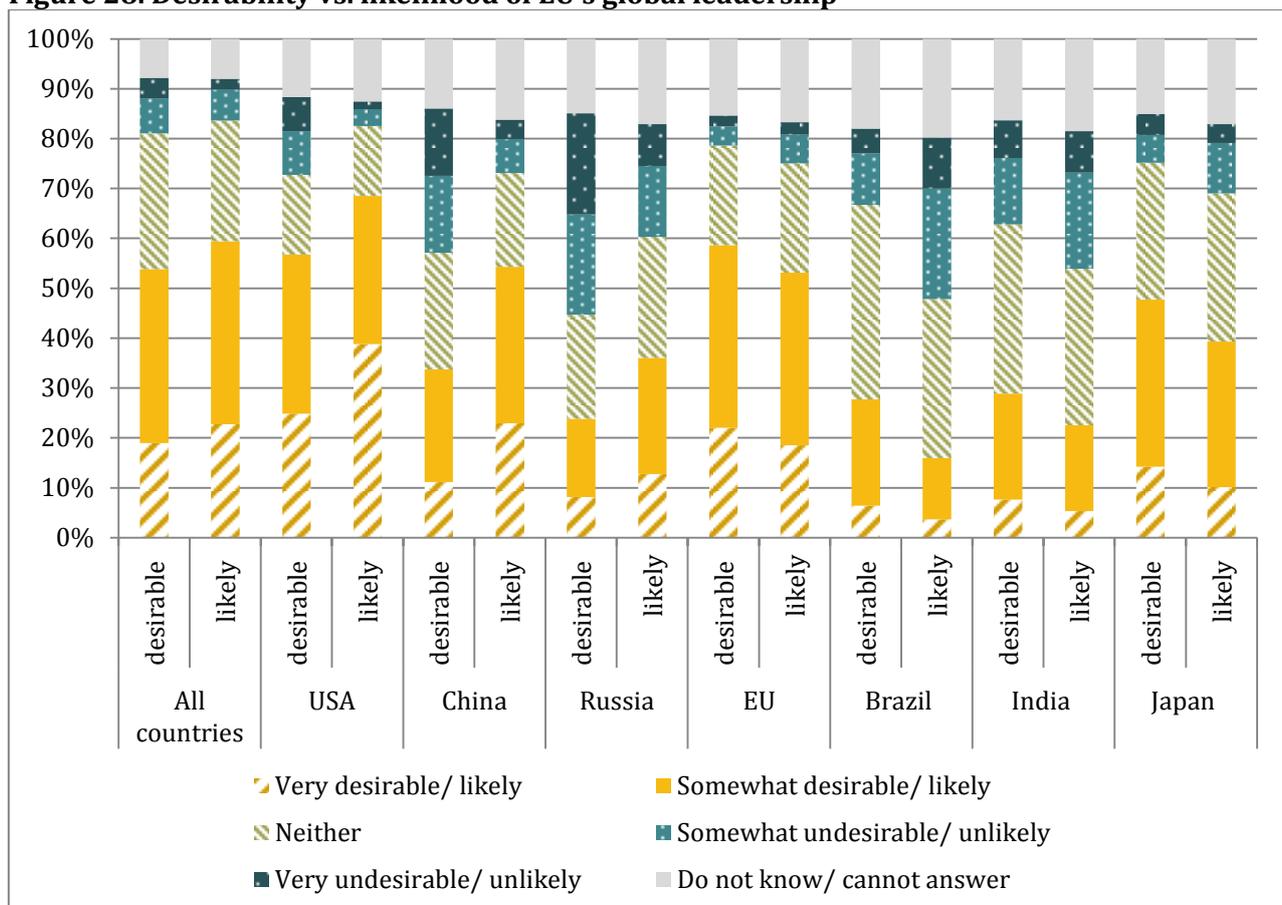
always perceived positively: elite views registered numerous irritations towards EU impediments to trade. The EU as a regulatory power was also often associated with EU bureaucracy. In addition, Canada’s economic activity was reported to be mostly based on small and medium businesses (SMBs) who tend to deal with the US, for practical and historical reasons. Elites thought it was much harder for SMBs to reach EU market.

This heightened public and elite perception of the EU as an important **trade partner** correlates with the EU’s *media* profiles. In the media, trade was the second most visible economic profile of the EU. Critically, here the EU was presented with numerous local ‘hooks’, not least due to the ratification of the CETA between Canada and the EU. The media profiles of Europe seem to confirm the local resonance of the image ‘EU as a trading partner’. Europe, as a concept, even more so than for the EU, was framed in terms of a destination with distinct business and finance opportunities for Canada, followed by trade.

Politics and security

The EU’s leadership in **world affairs** was regarded as desirable and preferable to that of other countries other than the US. However, the EU was seen by the public to be less likely than the US and, to a lesser extent, China to take a strong leadership role in the future (Figure 28). Predictably, in Canada most survey respondents see the US as the major player in world affairs in the future.

Figure 28. Desirability vs. likelihood of EU’s global leadership



Note: Based on the answers to survey Q4: How desirable is it that each of the following countries and organisations take a strong leadership role in world affairs; and Q5: How likely or unlikely is it that each of the following countries or organisations will take a strong leadership role in world affairs five years from now? (N = 1022)

In the issues concerning **politics and security**, a multilateral approach was seen to be ‘very European’ by *elites*.

The Canadian *general public* viewed the EU as lagging behind both the US and the UN, with the EU’s performance seen as comparable to that of NATO. The EU’s performance in peacekeeping operations was regarded slightly more positively than other peace and stability initiatives such as military operations or the fight against terrorism. Most media attention in the field of peace and security focused on EU action in a limited number of global ‘hot spots’ - Russia, Ukraine and Iran - but this frame was not the leading media topic. While EU negotiations with Iran attracted some positive media reflections, the EU’s interaction with Russia received mixed evaluations – with the Union both trying to flex its muscles as well as failing to do.

Media reportage did not cover EU *external* political actions extensively. In this reportage, the Russia/ Ukraine conflict and EU sanctions against Russia were clearly the main topic, followed by news about the nuclear talks with Iran and the launch of an EU military operation in the Mediterranean to solve the migrant crisis. There were also few articles on Israel and Palestine. Most of the articles in the political frame focused on EU *internal* politics, and specifically the UK election and future referendum on Brexit, and the political aspects of the Greek economic crisis. Reports of tensions between high-level Greek officials and their counterparts in Member States and EU institutions dominated. The EU dataset was in this frame different from Europe dataset. The main difference in the Europe database featured a very low share of ‘politics’ themed articles (no more than 14 per cent of the total articles). Instead, economic and social and cultural affairs were the first and the second most visible in Europe dataset.

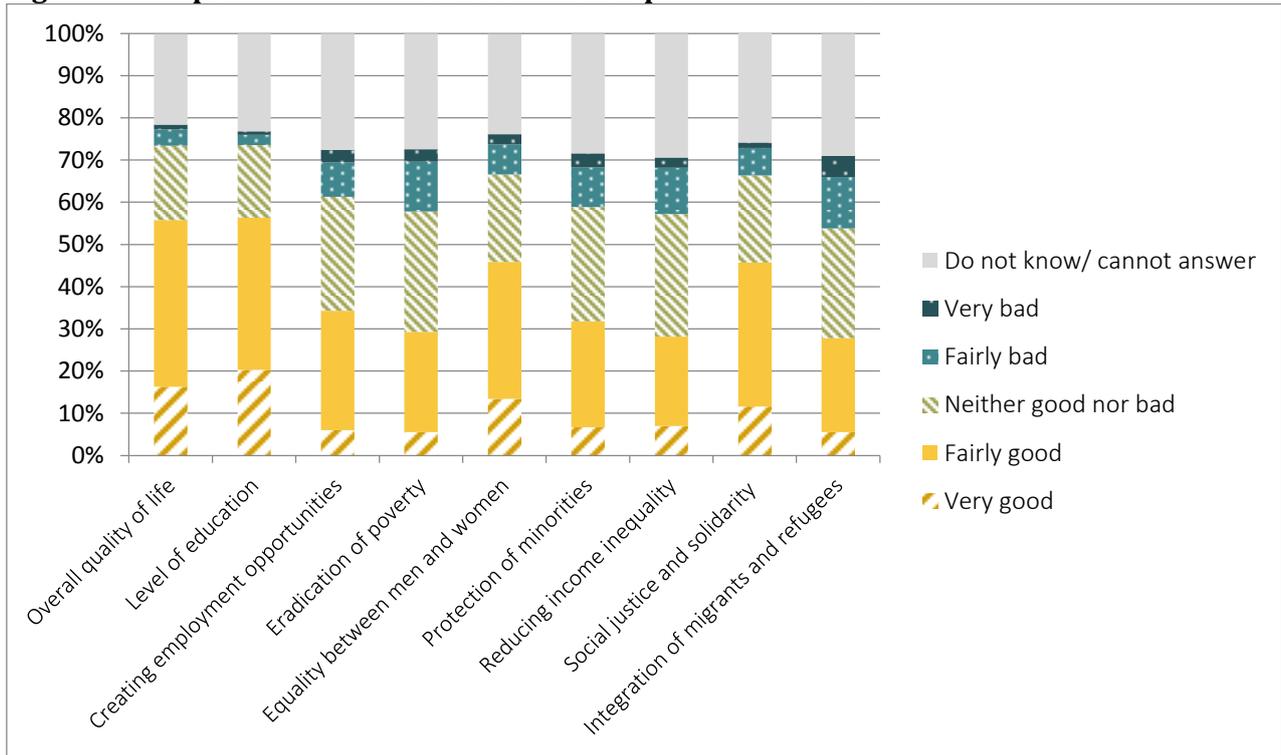
Development (social internal and international)

International development received extremely limited *media* coverage in the selected Canadian dailies. There was only one article in this category in the EU dataset, and only two articles in Europe dataset dealing with the Nepal earthquake and durable construction.

Canadian *elites* agree that the EU is an advanced actor in this issue-area serving as a model for Canada. For example, one elite noted, ‘that fact that Europe actually shames Canada in terms of some of its development - you know, international aid and development policies, for example – I think that’s very important for us. What Europe is doing in Africa, Eastern Europe, Asia we follow that very closely from that dimension. Yeah, they’re like us, they can be trusted. We like them.’

Canadian *public opinion* respondents view the EU once more as less important than the US or the UN. However, more respondents somewhat agree that the EU plays a more important role in this area than the World Bank. Canadians also see the EU as playing a more important role in this respect compared to the countries used for comparison. In terms of opinions on more specific topics related to **internal social development**, Canadian respondents see the EU as performing fairly well in social justice and solidarity (e.g. social rights, the public welfare system). Furthermore, the EU’s performance in overall quality of life and the level of education were among the most positively evaluated areas of social development (see Figure 29).

Figure 29. EU performance across social development indicators

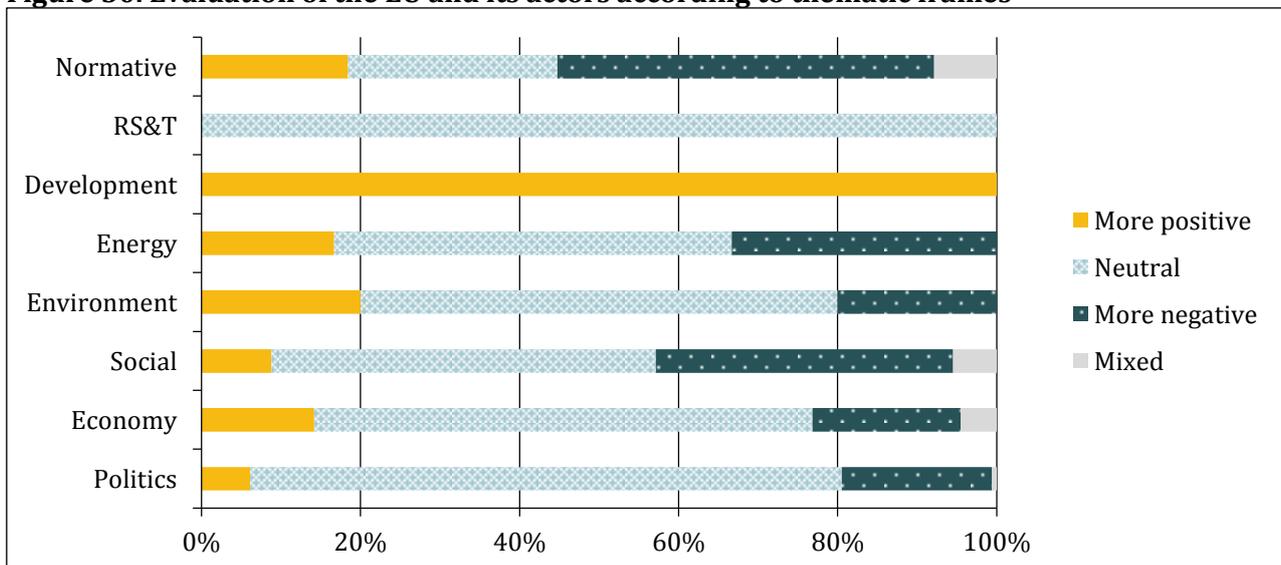


Note: Based on the answers to survey Q17: Generally speaking, how well do you think the European Union performs in each of the following areas of social development? (N = 1410)

Migration, multiculturalism and human rights

Significant *media* attention was dedicated to the coverage of **the Mediterranean irregular migration** crisis with a prolific number of critical articles towards the EU (duplicating the pattern of strong negative connotations assigned to the EU in the coverage of the Greek economic crisis and discussion on the UK exiting the EU) (see **Figure 30**). The image of the EU swamped by a flood of migrants coming from the poor South led the coverage. Thus while the visibility of the EU was raised in the media, this was not for the better in terms of public perceptions. The media presented the EU as not delivering on its own normative standards in human rights.

Figure 30. Evaluation of the EU and its actors according to thematic frames



Echoing this frame, *public opinion poll* showed that when it comes to perceptions of the EU in terms of **human rights and multiculturalism**, the EU's handling of refugees (and displaced people) was seen in Canada as significantly less positive when compared to the overall fairly positive evaluation of the EU's performance in other fields. The EU's performance in integrating migrants and refugees was also seen the least positively among other areas of social policy. It should be noted that the survey was conducted before the second refugee crisis that happened in Europe in September. In contrast, respondents saw the EU as performing fairly well in terms of social justice and solidarity (e.g. social rights, the public welfare system).

Environment and energy

*There was limited media coverage of **environment and energy***, despite the importance of the energy market in the Canadian economy, low oil prices, and the upcoming COP21 in Paris. The EU-relevant reportage within this theme took a critical look at the European carbon market and the EU fuel quality directive, because some Canadian provinces (Ontario, Quebec) have recently gained an interest in a similar carbon market scheme. When covered, most of energy framing of the EU and Europe was in terms of sustainability. In the dataset 'Europe' the European carbon market and renewable energies were discussed occasionally.

Echoing this low media interest, Canadian *elites* did not rank **energy** issues as the most important in the EU-Canada dialogue. Elites on the other hand, shared a consensus that the EU's energy dependency presented business opportunities for Canada. Yet, perceptions varied—some elite were disinterested in Europe (reflecting limited exports to the EU in this area); for others it was a significant topic because of the high volume of private European investment into the energy market in Canada.

Echoing modest media interest, in the eyes of the Canadian *public*, protection of the **environment** and the fight against climate change are not fields where the EU is seen as leading. The EU's role in fighting global climate change and protecting the environment falls behind the US, and the EU is regarded as performing as well as the UN. The EU's role in fighting global climate change and protecting the environment is seen similarly to its role in maintaining global peace and stability. The EU in this respect again falls behind the US, however Canadian respondents felt the EU performed similarly well in this field as the UN. In Canada, protection of the environment and the fight against climate change is not among the fields in which the EU is seen as standing out the most.

Somewhat reflective of the low media interest in EU **environmental** issues, *elite* perceptions only rarely referenced environmental matters and often those were mixed and rather generic. Interviewees were more aware of Member States rather than EU initiatives (e.g. British investment programmes, Arctic policy of Scandinavian countries). The absence of a common EU position on the Arctic was noted, with the region growing in importance touching an array of economic, security, environment and social issues. Mixed perceptions revealed on the one hand, the EU's high environmental standards were recognized; on the other, the elites shared an impression that EU environmental discourse is more opportunistic than normative (given Europe's limited natural resources for example). Canadian business people were confused by inconsistencies between the EU and Member States and disliked some EU regulations (e.g. REACH for industry people). Interestingly, in many areas, EU environmental policies were seen to resonate more publically than with Canadian government. Although the public opinion survey only partially confirms this.

Research, science and technology

Media reporting of EU **RS&T** issues was miniscule. Within the dataset ‘Europe’, the European organisation for nuclear research (CERN) and the European Space Agency got some attention.

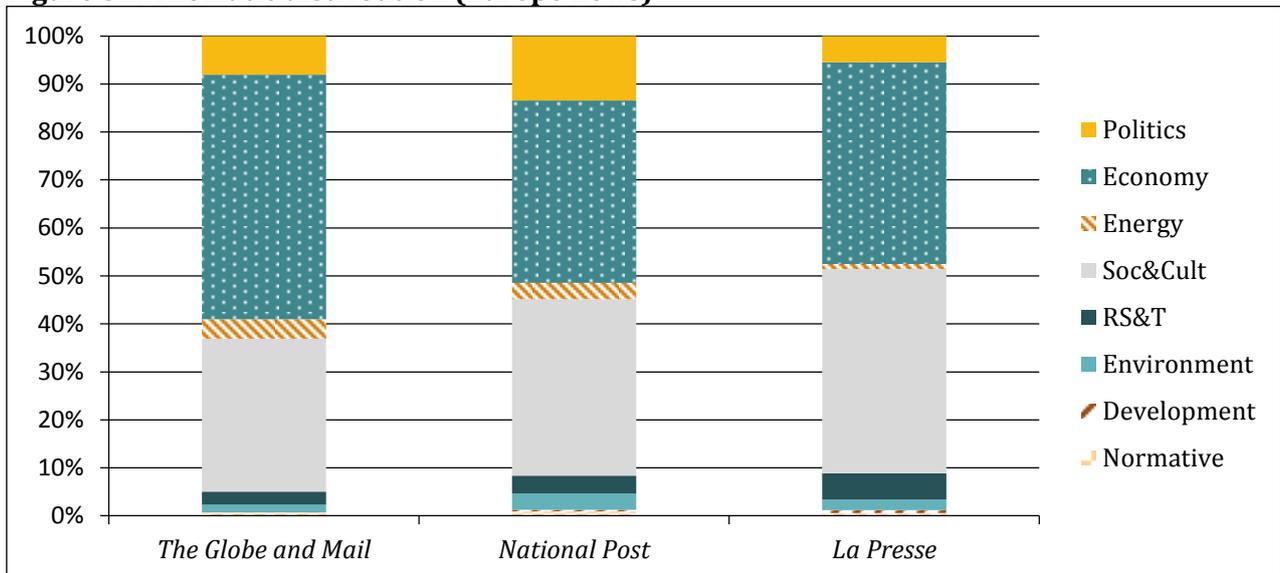
The *general public* saw the EU lagging behind the US, China and Japan in RS&T. Despite overall reservations about the EU’s global importance in this field –perhaps due to the very low media visibility of this topic – respondents felt the EU performs fairly well in various fields of technology, as well as science and research.

For Canadian *elites*, RS&T issue-area is recognised as a key element of EU policy, although not necessarily well-known and debated in Canada. EU research programmes and cooperation enjoy some awareness and attraction among the Canadian academic community. However, the lack of local government involvement and investments in this area of cooperation was noted. Two exceptions seen by elites were the Rosetta satellite and the European Extremely Large Telescope (E-ELT).

Culture

Media reporting of EU **cultural matters** was minimal. In contrast, the theme of **culture** was more visible in the media presentation of the concept Europe (Figure 31). News stories about European lifestyle (the main topic being tourism to Europe), entertainment (mostly about bands and artists touring in Europe or Canada) and history (stories on World War I and II, Nazism, and the Holocaust) were more visible in the Europe dataset than migration. World War I centennial celebrations demonstrated an ongoing emotional connection. Arts in general was an issue that featured prominently in the French-language papers confirming that culture matters more to Quebecers than to other Canadians (an observation that was confirmed by interviews).

Figure 31. Thematic distribution (Europe news)



Public opinion reflected some of this pattern. While respondents evaluated all aspects of European **culture** very positively, they were more likely to choose historical heritage, arts, food and cuisine over lifestyle, music, sports, cinema and theatre. Similarly, the EU’s performance in the entertainment industry was evaluated less positively compared to other economic activities as was Europe as a producer of music and arts. Nevertheless, when

compared to other countries, EU Member States were seen as particularly attractive for their culture and lifestyle. The Canadian public generally see Europe as an attractive tourist destination.

Elite views on the EU/ Europe as a producer of cultural outputs was varied. The *elites* shared the perception that reception of EU/ Europe culture depends on provinces: Quebec was seen to have a 'strong appetite' for European culture (not just French), followed by Ontario. Other provinces (e.g. central and Western provinces) are seen to care somewhat less. Some arts initiatives involving Germany, Spain, France were noted, although overall EU or European states' policies were not very visible for elites.

Regional differences and cultural divides were also noted in the *media* coverage of the EU/ Europe. The Quebecer paper *La Presse* differed from the two English language papers in several aspects. It had less EU-related articles, less visibility of EU topics and generally a more superficial coverage of the EU. The English-language papers used US and UK news sources, paralleling EU framing in Anglo-Saxon discourses, while *La Presse* had a more francophone influence (with AFP the leading source of EU and Europe news).

Education

Media reporting of EU **education** issues was minimal.

Canadian *public opinion* views the EU positively in terms of the level of **education** of its population, the area of social development where the EU performs best, making the EU an important partner for Canada's educational exchange. Yet, the general public has very little awareness of such opportunities, including programmes such as Erasmus.

Elites specifically mention the university exchange programmes favourably, singling out such initiatives as the (Jean Monnet) EU Centres of Excellence supported by the EU. Elites also stressed that the EU could do more to promote study and funding opportunities for Canadian students to go to Europe; however, awareness of the EU programmes and opportunities in Europe for students remained low.

The EU as a norm setter

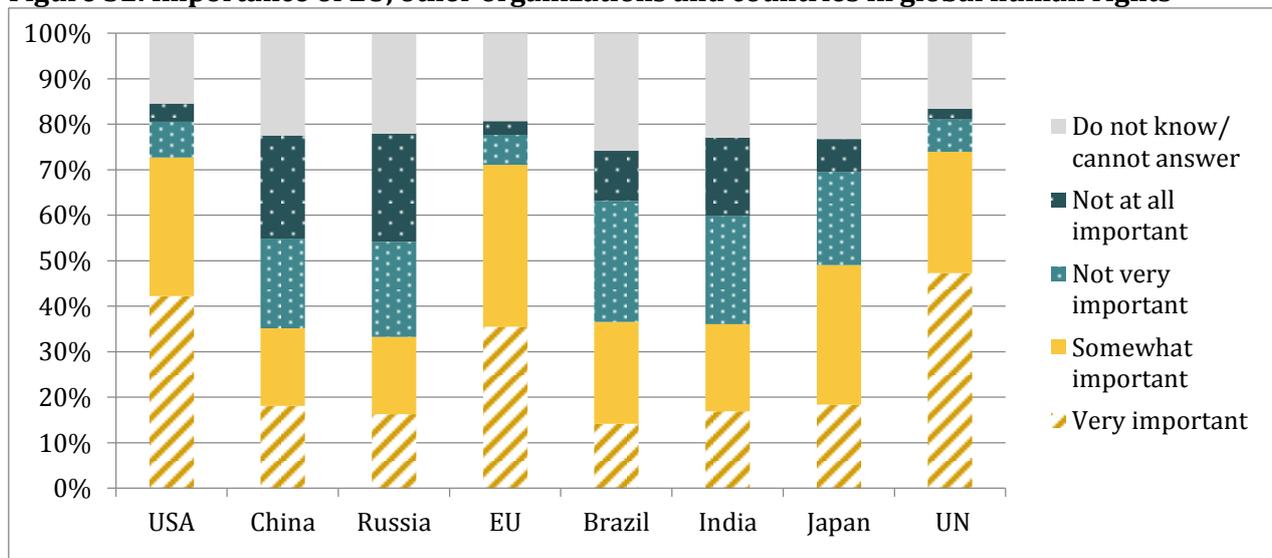
Media discourse did not register images of the EU in the normative contexts. Europe was referenced in the normative context, albeit in an extremely low number of articles (five). These reported on diverse topics such as political institutions in Canada and Europe or surveillance programmes in Europe.

A member of the *elite* group interview stressed the commonalities in the normative worldviews: 'from the Canadian perspective, we are all Europeans. We have European values, we are much closer to Europe in certain aspects rather than the US even.' In general, as discussed above, Canadian elites shared positive perceptions EU normative identity – its profile as a civilian power and its preference for multilateralism. In the section 'EU as a Local Partner' it was mentioned that Canadian respondents recognised similar priorities for the EU and Canada (e.g. transatlantic security, trade), similar political structures, and similar desires to not 'flex their muscles' in their dialogue and be multilateral partners instead.

Canada's *public opinion poll* respondents see the EU's performance in the field of promoting and defending human rights worldwide very similarly to how it fares in social development, with main rivals in these areas being the UN and the US (see Figure 32). In this field, however, respondents see the UN and not the US as the most important actor. The role of other countries is seen as substantially less important than the role of the UN, the US and the

EU. EU gender equality performance was evaluated the most positive among other human rights related issues listed.

Figure 32. Importance of EU, other organizations and countries in global human rights



Note: Based on the answers to survey Q10: In your view, how important a role do each of the following countries or organisations play in promoting and defending human rights worldwide to protect human dignity, freedom, equality and solidarity? (N = 1022)

3.2.4 Local conditions: explaining the perception of the EU in Canada

Perceptions are a result of interactions between internal (Canada-specific) and external (EU-specific and global) factors. There are several possible explanations for the profile of EU images and perceptions in Canada.

Firstly, the local historical political context – Canada is a federal state where decentralisation is strong and ongoing. One consequence is a set of important differences from one province to another that will influence image and perceptions of international counterparts (including the EU). Canada as a regional and decentralised country is argued to be the main factor towards explaining the perceptions of the EU and Europe. This suggests that future EU perceptions studies should deliberately focus on all regions of Canada and compare main trends across all provinces in a systematic way.

Secondly, images and perceptions are inevitably influenced by local contemporary political contexts – this study took place when a conservative majority was still in power (and had been for nine years), leading to some interesting fault lines in the perceptions – e.g. government position not always being congruent with public opinion in the field of environment or multilateralism. There was also a distinct political agenda of the Conservative government, namely a very strong emphasis on the free-trade deals with main economic partners in the world (including the EU), and downplaying concrete challenges to ratify and implement them. After nine years of Conservative majority, a new Liberal government has been elected on October 19, 2015. Although at the time of writing this report it was impossible to ascertain what the future direction of the new federal government would be, its foreign policy is likely to be more open towards multilateral priorities dear to the EU (such as environment) than the Conservative government was.

Thirdly, there is a view that there is a general lack of interest in Canada for all international news. Local newsmakers emphasise reporting local events and actors. This stress of ‘local’ is

a significant trend observed not only in the media production but also in school programmes (secondary and high schools). Future EU perceptions studies in Canada could assess a greater variety of media sources (press, broadcast and new media) as well as explore educational discourses in their framing of Europe and the EU.

Fourthly, cultural proximity is another important factor. Canadians recognised commonalities in understanding norms and values, as well as languages spoken in Canada and overall culture. Family ties (ancestors, European migrants to Canada, family relatives in Europe, etc.) play a role in shaping perceptions too.

3.2.5 Recommendations for EU Public Diplomacy

Canadian perceptions were strongly influenced by visions of historical and cultural links to Europe and a shared feeling of 'cultural affiliation' and 'cultural affinity'. Elites reported that culturally, Canadians and Europeans understand each other, with Canadian culture being influenced by Europe in major ways. Elites stressed importance of personal/ family ties with Europe (ethnic origin, studies, or travels) and commented on the European immigration to Canada. Elites also commented on stronger historical and cultural ties between Canada and Europe vis-à-vis those between the US and Europe. In this light Europe-Canada relations were seen as deeper ones vs. more geopolitical relations between the US and Europe. The interviewed elites often have had educational experiences in the UK: thus, PD initiatives could continue targeting Canadian elites, expanding their personal links to the EU through various initiatives that would bring them to Europe/ EU (e.g. field trips for leading bankers, or Parliamentarians, or media personalities). Also, it could be beneficial for the EU to increase education opportunities (and awareness of existing ones) for Canadian students on the tertiary level targeting future national elites. Reaching out to youth organisations and government-sponsored initiatives (e.g. International Experience Canada) would also be relevant. According to the group interview and others, studying in Europe is still very attractive for Canadian students.

The elites shared the thought that the Canadian general population would hold a 'cliché' image of Europe: travel destination, culture, tourism, food, as well as general like-mindedness. Some of those predictions were supported by the public opinion analysis. Elites also believed that the public had a general lack of knowledge and awareness of the EU and were usually confused. Elites warned that the general population still thinks about the EU in terms of states, with difficulties understanding distinctions between EU supranational architecture and EU Member States. Elites also predicted that if there is a public EU perception, it will be rather negative due to economic and migration crises – a perception of a system with many defects.

Somewhat contradictory to these elite predictions (which were possibly informed by the media framing of the EU), positive perceptions of the EU were registered at the public level. The EU was among the most positively viewed (below only Japan and the US) and was rarely seen as negative (here slightly behind only Japan, and significantly ahead of the US). Compared to other international organisations, respondents evaluated the EU more positively than all others except the UN. The EU was most commonly described by general public as multicultural and modern; and least often described as aggressive, hypocritical or arrogant. This is in line with the positive general view of the EU as well as the positive assessment of Canada's relationship with the EU. Interestingly, the EU led in the use of the adjective united, and was behind only Japan in being described as peaceful and trustworthy. The EU was least often described as aggressive, hypocritical or arrogant in general and also

compared to most other countries. These positive perceptions among the public constitute a resource for EU Public Diplomacy that can be capitalised on. Important here is also to keep a trace on the dynamics of the non-responses rates (i.e. those respondents who say 'don't know'). An increasing level could indicate a lack of perception and possibly growing indifference, rather than a positive or negative attitude. As such, regular public opinion survey designed to be compared across the time should become a regular feature of the EU Public Diplomacy in Canada, and other Strategic Countries for that matter.

Positivity in images of the EU and Europe was also registered among the elite respondents. The general concept/ idea of Europe for interviewees was generally very positive – this is if current crises are disregarded. The EU was still recognised as a peace project and social-democratic and progressive model, warranting prosperity for its citizens. It is perceived as an entity with considerable power and potential, and even as a fascinating experiment. Elites also demonstrated the tendency to use different European states by way of comparison, emulation and inspiration. First, for Canadian elites, several European states are of key importance or relevance on specific issues: trade (UK, France, Germany, Italy), maritime trade (Netherlands), energy sector (Netherlands), news coverage (London and Paris), culture (France, Italy). Secondly, elites try to find inspiration from particular public policies in specific European countries, for example: how France or Belgium are having a particularly successful healthcare system, how the UK is performing well in terms of job market flexibility, etc. Thus, EU PD should use these European countries as first points of reference/ entry in the EU-led dialogue with Canada.

The findings confirm that conflating the EU and Europe concepts must be approached with care. The media employed different frames and evaluations for the EU as opposed to Europe. In Canada, the share of neutral evaluations found in Europe news was higher than for EU news, however both negative *and* positive news featuring Europe were less visible. The *public opinion* poll also explicated that Canadians view the EU and Europe differently (via associations to specific themes), but many, almost a quarter, saw no difference and another quarter didn't answer (a visibility issue maybe). There are theme-specific associations – Canadians associate the EU with economy, politics, and social development, while they tend to associate Europe with sports, culture and science.

When crafting informed PD in Canada, it is critical to remember that images of the EU and Europe are region specific: in Eastern and Central Canada – Atlantic provinces, Quebec, Ontario – there is a perception of a closer relation to Europe (the themes of the old country, the family, etc.). This is less the case in Western Canada. Thus, region-specific outreach strategies are needed. There is also a noted lack of EU presence in major cities except Ottawa. For business profile, EU presence should be visible not only in Toronto, but Ottawa, Montreal, Vancouver and Calgary, that is, the main location where European investments in Canada are made. In the area of trade, European countries have limited resources in major Canadian cities apart from Toronto and Montreal (e.g. chambers of commerce). EU PD should nonetheless rely on these chambers of commerce (e.g. Vancouver offices of Italian or UK chambers of commerce and Eastern Canada offices of French chamber of commerce) and pursue dialogue with provincial Canadian chambers of commerce (e.g. Alberta, Quebec, Ontario or BC chambers of commerce). A fruitful example of such collaboration was a set of CETA-related conferences organised by the Italian chamber of commerce in Canada during the year 2014, with funding from a Jean Monnet programme. In the area of culture, European cultural affairs institutes based in Canada remain very focused on bilateral initiatives, apart from the Goethe Institute, which promotes European activities. The Goethe Institute could serve as a model to emulate.

Different sectors of economic activities will also matter as well as different types of business (large corporations vs. small and medium business (SMB)). Their perceptions of the EU will differ. The former typically already have their networks in Europe and they possess good EU awareness. The latter account for most of the Canadian economy but they have little EU knowledge and not enough resources to become fully involved. They are generally interested in engaging with the EU, but not always aware of remaining obstacles. Moreover, one of the main perceptions of SMBs in Canada is that it is hard to enter the European market as it has many regulations and technical barriers, which implies certification procedures and costs that are far beyond the human and financial capabilities of most of these SMBs. Thus, a more strategic – business - survey is needed to compare EU perceptions among different sectors of business in Canada in order to devise PD outreach on a more nuanced level. Business people on all levels complained about strict European immigration rules for temporary stays that restrict business people's mobility. One initiative that could serve as a model to follow and emulate is the Quebec-based 'Carrefour Europe': Carrefour Europe is an annual event that serves as a platform for Quebec-based businesses (including SMBs) to learn about business opportunities in Europe and get involved in them. It results from a partnership between Montreal-based European chambers of commerce, Quebec's ministry of economic affairs, the Jean Monnet EU Centre in Montreal, and the local private sector. So far, it is a unique initiative, which has no equivalent in other Canadian provinces. Besides, in terms of reaching out to Canadian SMBs, EU PD could strengthen its dialogue with the network of Trade Commissioners, who serve as a voice and source of expertise for these SMBs in different sectors.

Sources of news matter too. Influence of Anglo-Saxon media (from the UK and the US) on framing the EU in media is perceptible (in contrast, *La Presse* used a French source of news). The Eurosceptic tone of British press has a certain influence on Canadian journalists and the population. Thus EU PD could propose realistic avenues to diversify news sources and develop a set of media outreach activities.

CETA – a major interaction between the EU and Canada - has put the EU in sharper focus for media and as well as for some people in business, think tanks, academia, but not so much for the general public, as it is the case for most multilateral trade negotiations. Overall, CETA elicited positive views from media and elites. Not least is this due to the perceptions that the EU and Canada have similar economic, political and cultural characteristics. There were also lesser fears of lowered standards. However, some concerns remain (e.g. dairy market in Quebec and Ontario, or public procurement). EU PD should use the CETA framework to boost EU visibility among various elites and civil society/ general public. It should also make sure that CETA will not suffer from the spill-over effects of the TPP negotiations, which raises more controversies in the Canadian public opinion.

The media's extensive focus on negative EU issues (such as Grexit and Brexit, Greek economy, economic and migration crises, right-wing extremism in Europe) feeds back into local perceptions of local stakeholders as well as the general public who learn about the EU from the media. Modern-day media rules dictate that today's media coverage in Canada (and elsewhere) is about stories and people rather than institutions and events. This is challenging for the EU – the EU remains a hard topic to explain and sell. Yet, higher visibility that came with dramatic stories about crises will wane as soon as the crises subside. In addition, media's overzealous attention to the ongoing crises within Europe sends a message to Canadians about Europe's inability to solve its own problems. Thus, EU PD in Canada should focus in its message that the EU remains a sustainable model. The EU's PD's other

task will be to recalibrate communication to the sectorial level of Canadian economy or the local/ grass root level targeting particular groups and populations.

EU coherence remains a debated topic in the context of crises in the media and among elites: some see it as having made progress, e.g. in the field of trade, others are much more sceptical and highlight inconsistencies between the EU and different Member States. However Canada – a federal state – can relate to this challenge, as the EU/ Member States possible inconsistencies echo the ambiguous division of competencies between federation and provinces. EU PD could leverage this similarity to shape its message about European integration in the language and concepts familiar to Canadians, drawing parallels with local political realities and addressing different levels of government accordingly.

An additional challenge for PD is that the EU is presented as too defensive. It is a complex structure of rules, regulations. It is seen to take too long to decide and Brussels is perceived to be too detached from reality (both perceptions present competitive disadvantage for Europe if compared to the US). In terms of normative profiles, the EU/ Europe is often recognised as an ambitious message sender, but sometimes there is a gap with its practice. Sometimes, the normative principles are seen to disappear for the EU (e.g. in its economic relations with China). EU PD should engage in open discussions on norms and values with academia, think tanks and media.

Finally, Europe is not visible enough in the RS&T area. The plethora of Canada-Europe cooperation in this field was not visible in the media, public or elite views. RS&T is probably the domain where there is the most potential for immediate valorisation of ongoing, yet not visible, Canada-Europe partnerships, even more so given that it is a policy area that is very positively valued by public opinions. EU PD can look into various strategies on how best to raise visibility in this area as a true mutually beneficial collaboration – a mark of successful PD – is already taking place through RS&T projects. As a first step, EU PD could join forces with the recently created ERA-Can+ network (<http://www.era-can.net/>), a network of European research science foundations and Canadian institutions, which attempts to promote joint Canada-EU research and innovation cooperation in relation with the Horizon 2020 programme.

Media reportage of the EU listed a number of actors who are already seen to interact with the EU. On the government side, the most visible local actors engaged in interactions with the EU were Prime Minister Stephen Harper and the federal government; Bank of Canada and its Governor Stephen Poloz; and Foreign Affairs, Trade and Development Canada (including trade commissioners and trade officials). This profile was confirmed by the elites who perceived that in the field of politics, it is the Canadian federal government who remain the primary interlocutor with the EU. Although individuals will change with the newly elected federal government of Prime Minister Justin Trudeau, these categories of actors will remain central under the new majority. Other central governmental institutions for PD initiatives include for example the Competition Bureau. However, in the eyes of the elites, the provincial level becomes more relevant when it comes to EU-Canada relations in business, culture, etc. Elites agree that more can be done by the EU at provincial interactions, especially within the context of CETA implementation (e.g. the EU could strike dialogues with Premiers, the Council of the Federation, provincial Auditor Generals, etc. to address issues of public procurement, healthcare, infrastructure investments). Also, in matters related to culture, Canadian metropolises tend to have a bigger and bigger say and decision-making power, something that EU PD should take into account.

Given that a dominant EU media frame was as an *economic/trading actor*, it comes as no surprise that coverage listed a plethora of private actors who were dealing with the EU, including diverse investment funds, investors, Bank of Montreal and its economists, Royal Bank of Canada and its economists, diverse portfolio managers and farmers. Specifically for business, Canadian elites recommended the EU develop mechanisms to talk directly to corporations in order to address different business areas. In the eyes of local stakeholders, potential partners for the EU could be sector-based industry associations (e.g. wood industry, automobile industry...), accessible via trade commissioners, or the CFIB (Canadian Federation of Independent Business). Local elites also stressed one key area – the Arctic – where the EU has an opportunity to reach out to local populations in the Northern territories (e.g. hunters and trappers organisations, Numerous NGOs and members of Assembly of the First Nations). EU restrictions to trade of local seal products remains a contentious issue within the populations of these Northern territories.

Recommendations for EU Public Diplomacy from practitioners on the ground in Canada

From the perspective of practitioners at the EU Delegation on the ground there are several key areas for successful EU Public Diplomacy outreach in Canada. As the EU Delegation has already commenced to do, practitioners propose to broaden the scope of PD – from trade promotion to addressing CSDP-related issues. Furthermore, bureaucratic and hierarchic hurdles within Brussels HQ, between Delegation and HQ and in budget application processes are seen as an obstacle to conducting successful PD outreach. Practitioners furthermore suggest to aim for smoother and in time-coordination among DGs' services in order to contribute to planning of EU Delegations. Finally, the tailoring adjustment of PD strategies and implementation details to national conditions and regional contexts should be delegated to the EU Delegation.

3.3 China

This Country Chapter presents a synthesis of the China-specific findings of media analysis; elite interviews 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 China according to the research criteria applied – namely visibility; actorness and local resonance; and norm-setter. Moreover, in the section on actorness and local resonance, we discuss these according to the themes analysed in this research: economy and trade; politics and security; normative and human rights; development – including the social internal and international dimensions; migration, multiculturalism and human rights; environment and energy; science, research and technology; culture; and education. The final section before policy recommendations looks at the local conditions that explain the perception of the EU in China. Finally, we conclude the chapter with recommendations for Public Diplomacy, including a subsection on recommendations in the eyes of practitioners based at the EU Delegation to Beijing.

3.3.1 Sample

Public opinion

The online omnibus survey was coordinated and analysed by the Public Policy and Management Institute (PPMI) and conducted by TNS Global. The respondents in China were surveyed in mandarin Chinese. Data collection took place in August 2015. The online omnibus survey was designed to be nationally representative with regards to age, gender and region. The survey covered a total sample of 1410 individuals within the 16-54 age group.

Media

The media content analysis was designed, supervised and coordinated by the National Centre for Research on Europe (NCRE), University of Canterbury, New Zealand, and conducted by local researchers trained by the NCRE. Two popular prestigious papers *People's Daily* and *Global Times*; and a business daily *21st Century Business Herald* were monitored daily between April 1 – June 30, 2015 using e-search engine Press Display to ensure high accuracy in data collection. Two separate datasets were collected over the period of observation – 'EU' (480 articles) and 'Europe' (1176 articles). Key search terms for dataset 'EU' included (with acronyms) 'The European Union', 'The European Commission', 'European Parliament', 'European Court of Justice', 'European Central Bank', 'European Presidency', 'Council of the European Union', 'Eurozone'. The key search terms for dataset 'Europe' were 'Europe' and 'European'.

Elite opinion

The NFG coordinated the interview programme and designed the questionnaires in close coordination with the Country Experts and the project partners. The NFG was also responsible for the training of the Country Experts and supervision of the implementation of the interviews. The interviews itself were conducted by the Country Experts. Interviews have been conducted as a source to identify upcoming trends and to cross-check findings. They are non-representative due to their current scope and should be considered as a tool for future evaluations in a representative volume. The NFG chose a three-phased approach: in Phase I, two transcripts were due until June 6; in Phase II, five interviews were due until July 15; and in Phase III, five interviews were due until August 17. The NFG was in charge for the coding of the transcripts and the provision of the results to the project partners.

Interviews in China were conducted in Chinese and translated and transcribed by the Country Experts. They interviewed 11 experts (Academia/ Think Tank (2), Policy-maker (2), Civil Society/ NGO (2), Business (2), Media (2), General Public (1)) and held one group interview with five students (PhD student from Fudan University, MA student from University of Macau, BA student from Liaoning University, BA student from Lanzhou University, BA student from China Foreign Affairs University).

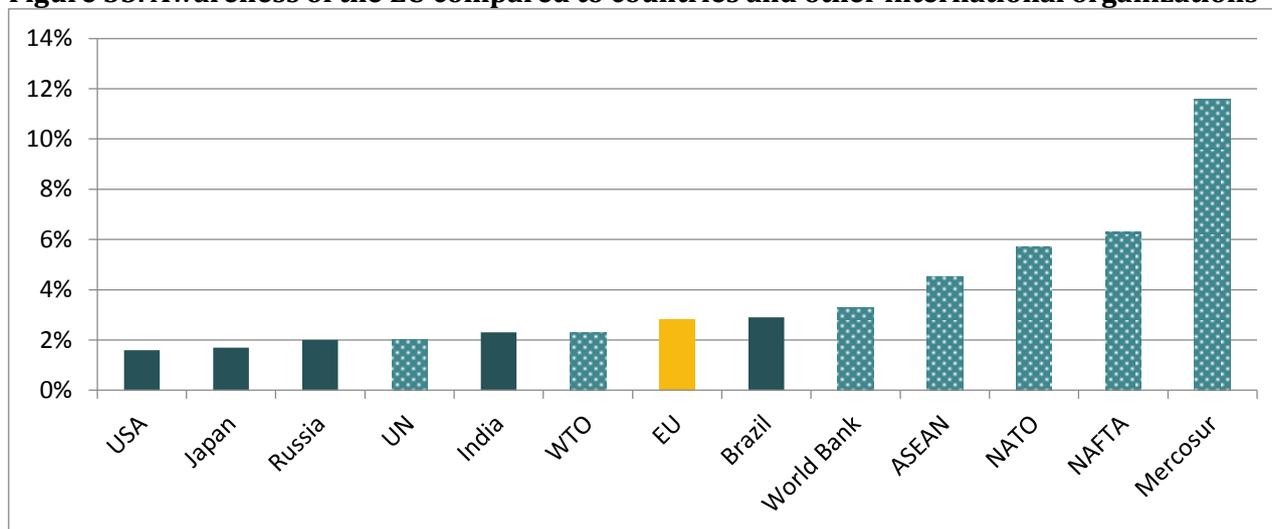
Semi-structured, anonymous qualitative interviews under Chatham House Rules were conducted with all EU Delegations across the 10 Strategic Partner countries, primarily in the form of a group interview. The groups included Heads/ Deputy Heads of Delegations, Heads of Press and Information Section and/ or Heads of Political Affairs Section. Interviews lasted between 60 to 90 minutes. In China, three diplomats were interviewed in two separate interviews.

NB: two robust datasets collected in the course of public opinion survey and media monitoring allow for quantitative and qualitative analysis of data (for more detailed information, please see attached country-specific media and public opinion reports). Survey of elite opinion is impressionistic due to small numbers of the interviews. Data collected is analysed using qualitative approach.

3.3.2 Visibility

In the eyes of the Chinese *public*, the overall visibility of the EU was slightly below that of the countries used for comparison (Figure 33). For Chinese respondents, the UN and the WTO were more visible than the EU, yet the EU was more visible than other international organisations.

Figure 33. Awareness of the EU compared to countries and other international organizations



Note: Based on the answers of option ‘Do not know/ cannot answer’ to survey Q1: Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations? (N = 1410)

Media visibility of the EU was traced in the three leading papers – two popular dailies *People’s Daily* and *Global Times* and a business daily *21st Century Business Herald*. These papers produced a sizable sample of news stories that referenced the EU and its institutions (480 articles) and Europe (1176 articles) over three months. The averages for the 10 country sample were 505 articles in the EU dataset and 635 articles in Europe dataset. Articles reporting the EU tended to be long and often reported the EU with a relatively high degree of centrality (Figure 34), although with little visual support. With a substantial share of the EU

articles appearing in the ‘main news’ sections (sections where main local events are discussed), the visibility of the EU could be described as *partial but with local visibility*. Europe was presented from a minor perspective and in longer articles (

Figure 35). Such framing suggests ‘diluted’ visibility of the concepts.

Figure 34. Degree of centrality (EU news)

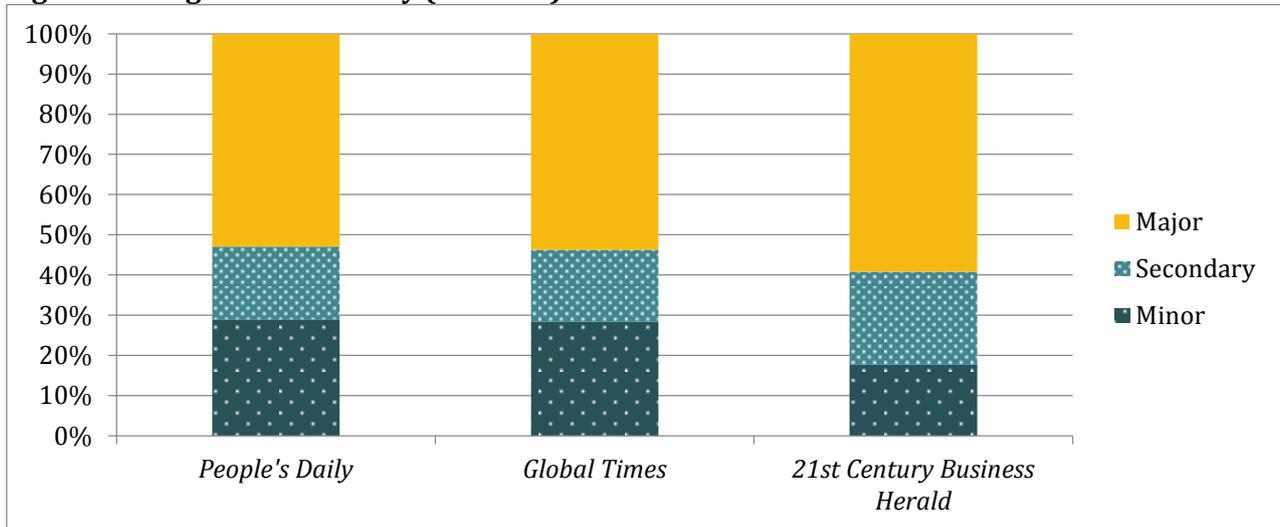
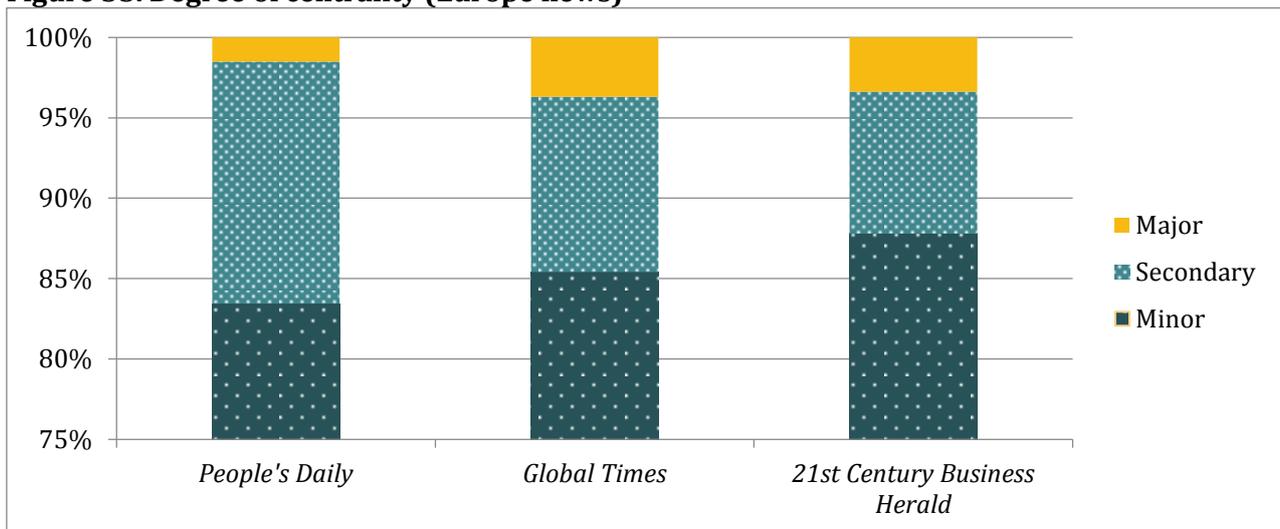


Figure 35. Degree of centrality (Europe news)



Some of the most visible topics reported had a ‘local hook’ to them (e.g. the 17th China-EU Summit attended by Li Keqiang; Morgherini’s visit to Beijing and the 40th anniversary of China-EU relation; and more generally China-EU strategic partnership and China-EU trade) (Figure 36). The other most visible topics were EU-specific – Greek debt crisis and possibility of Brexit (the latter discussed in the reports on the UK election). EU Member States were more visible than the EU institutions (the most visible were Germany, followed by Greece and France). The visibility assigned to these actors was due to the heightened attention given to Greek debt negotiations, in which Germany and France were featured as leaders in the Eurozone. The European Commission was the most visible EU institution in the monitored period (followed closely by the European Central Bank). President Juncker was the most visible EU official in the Chinese influential press. Frequent appearances of Juncker were related to the 17th China-EU Summit and celebration of 40th anniversary of China-EU relations (reported interacting with Li Keqiang). Nevertheless, his visibility was much less if

compared to the media profile of Germany and Greece, and their respective leaders Merkel and Tsipras. The UK and its leader was the third most visible EU Member State, due to its election and debate around exiting the EU. Most of the EU news reported the EU from a neutral stand point (Figure 37).

Figure 36. EU News 'with local hook' vs. news without it

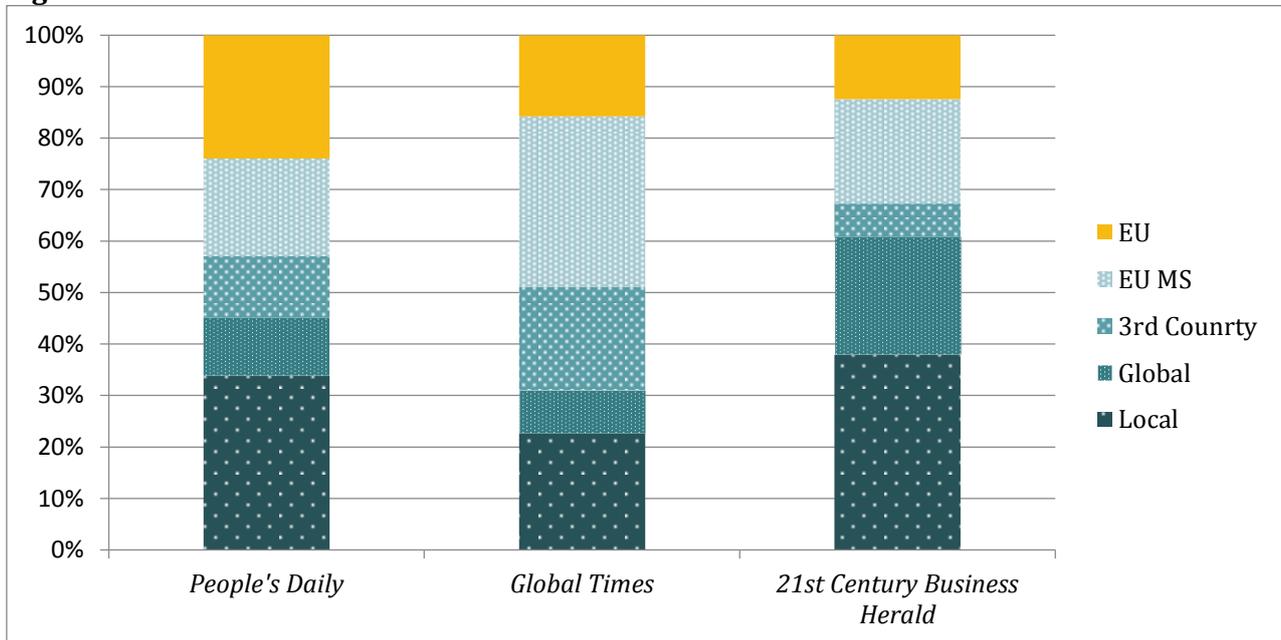
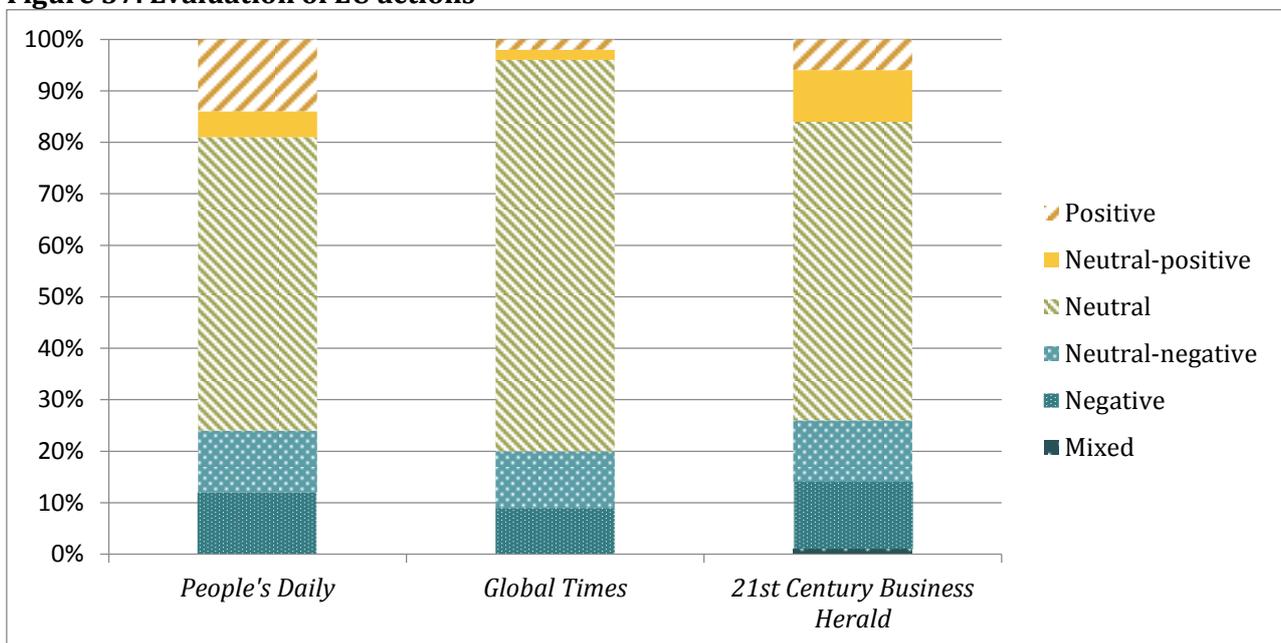


Figure 37. Evaluation of EU actions



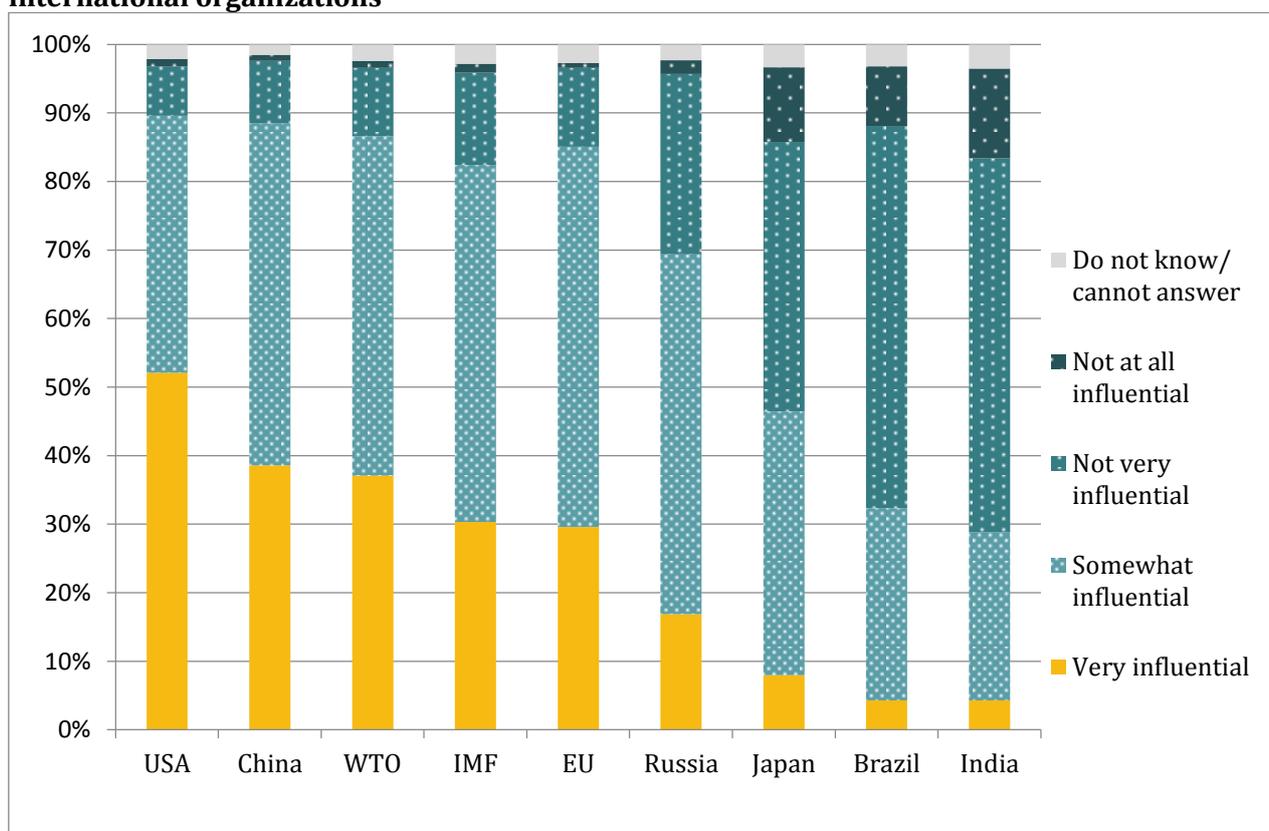
Local *elites* interviewed in this project demonstrated awareness of the discussions about the China-EU 2020 strategic agenda for cooperation and the European Commission's visitor programme. These were seen to raise the visibility of the EU among the local stakeholders. A small sample of the local *elites* approached here expressed views that suggest that they are well informed on the EU and EU-China interactions and are engaged with the EU directly. Their perceptions are detailed below.

3.3.3 Actorness and local resonance

The EU as a partner

Chinese *public* agreed that the EU is an important trade **partner**, important partner in science, research and technology and for foreign investment in China. In international relations they saw the EU as an important and trustworthy partner for China. In global economic affairs, when compared with other actors, respondents see the EU lagging behind the USA, China itself and the WTO, with influence perceived to be similar to that of the IMF (Figure 38). When compared with organisations, respondents see the EU lagging behind the WTO, with influence perceived to be similar to that of the IMF.

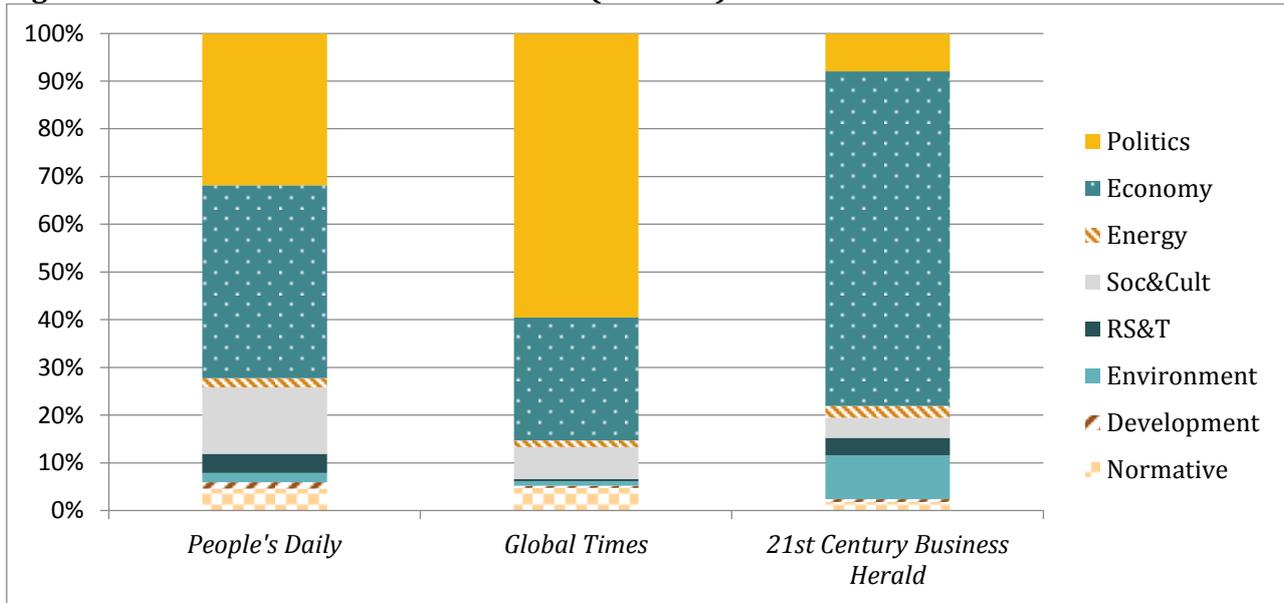
Figure 38. EU's influence in global economic affairs compared with countries and other international organizations



Note: Based on the answers to survey Q6: In your view, how influential in global economic affairs are the following countries and organizations? (N = 1410)

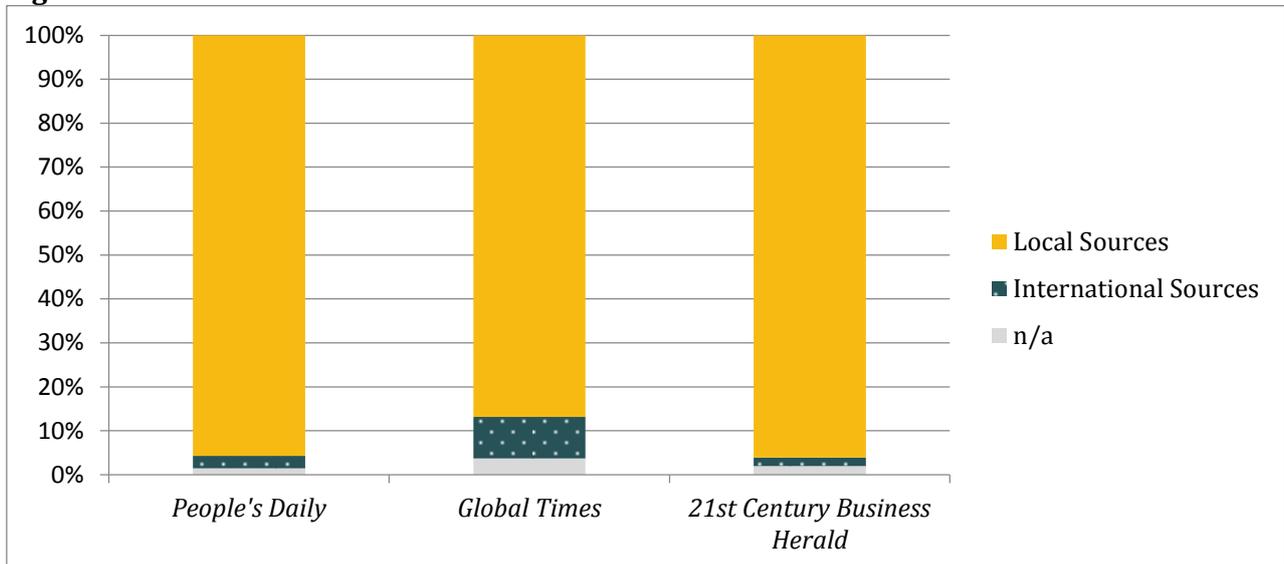
Specifically in China, the EU was framed by local popular *media* as a political **partner** (Figure 39). Leading Chinese media chose to report extensively on the China-EU Summit and the anniversary of China-EU diplomatic relations. In the context of these two China-EU events, the European Commission and its President were highly visible, leading other EU institutions and officials. Two popular dailies *People's Daily* and *21st Century Business Herald* – that typically focus on local Chinese issues – were interested in reporting the EU's actions in China (providing a local 'hook') extensively. Such a pronounced local perspective when reporting the EU suggests that the EU was framed by leading opinion-making sources as a 'significant Other' relevant for the location. *Global Times* – which is more externally-oriented daily – focused on reporting the EU acting in its Member States, especially Greece. *Elite* perceptions modestly sampled in this study echoed media frames with a view that 'European diplomacy is active in China.'

Figure 39. Distribution of thematic frames (EU news)



The intensity for local 'hooks' in the Chinese press demonstrated almost exclusive use of local sources for all three papers. In China, one of the chosen papers, *Global Times*, has its mission to report international news, thus it did feature some EU news sourced from outside China, yet, those sources – *Die Welt*, *EUobserver*, *Financial Review Australia*, or *Forbes* – were not the typical sources noted in other countries (e.g. Reuters, AFP, AP or Bloomberg, for more information see Comparative Media Report) (Figure 40).

Figure 40. Sources of EU news



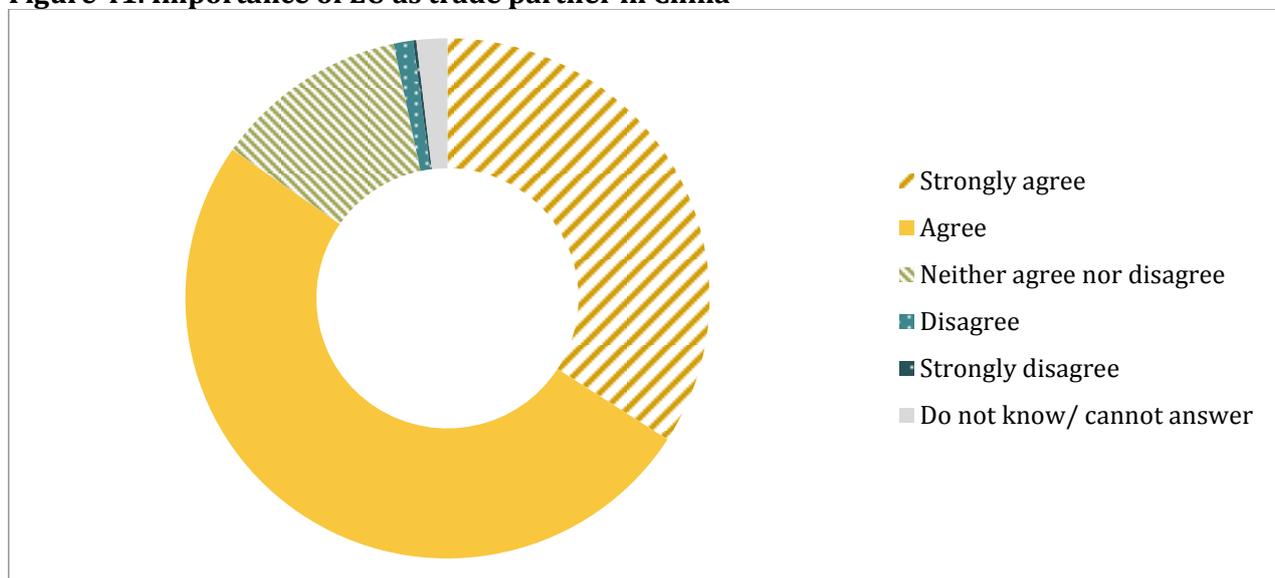
Economy and trade

The *media* extensively focused on the Greek debt crisis and gave the European Central Bank relatively high visibility (second most visible after the EC). EU news in *People's Daily* and *21st Century Business Herald* focused on the topic 'state of economy' reporting the Greek debt problems and slow growth/ recovery of the Eurozone economy. The EU's image in this reportage was often compared to a person engaged in battles and war in the field of economy trying to fight its way out of the crisis.

The most visible EU economic action in *Global Times* (that prioritises coverage of the world) was **trade** with China and elsewhere. In general, all three dailies devoted substantial attention to the EU's economic interactions – including trade, mutual investment flow, mergers, acquisitions and joint ventures between companies (30 per cent of economic EU-news in *People's Daily*, 33 per cent *Global Times* and 18 per cent *21st Century Business Herald*). Economy was the leading frame in reporting 'Europe'. *The business and finance* sphere received the most attention in how Chinese press reported 'Europe', followed by *infrastructure*.

Echoing this media framing, the EU was perceived among the *general public* to be mostly associated with economy. Encouragingly for EU Public Diplomacy during the crises years, the EU was perceived by the *public* to be performing fairly well in global trade, financial services and banking. This view was further supported by the finding that a high share of respondents agreed that the EU was an important trade partner for China (Figure 41). The Euro was the most visible among the items describing the EU.

Figure 41. Importance of EU as trade partner in China



Note: Based on the answers to survey Q14: Looking from China's perspective, how strongly do you agree or disagree with each of the following statements about the economic relations with the European Union? The European Union is an important trade partner with China (N = 1410)

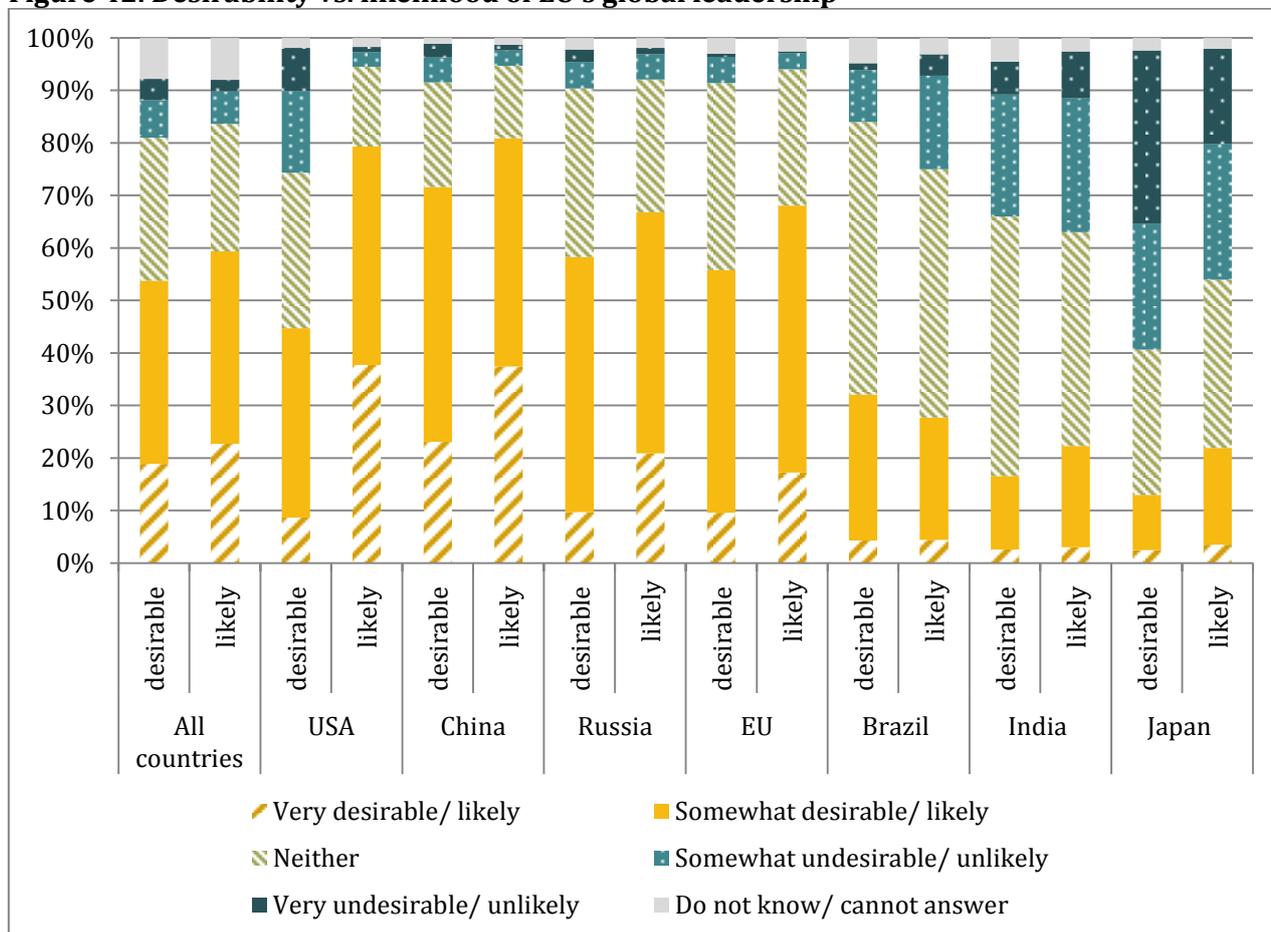
The limited numbers of the interviewed *elites* demonstrated knowledge of a number of successful China-EU collaborations in the field of **economy and trade**. Among those mentioned there were China Europe International Business School (CEIBS); European countries' participation in AIIB (and specifically the UK, France and Germany); cooperation between Das Auto and Shanghai Automotive Industry Corporation. Yet, some elites critically compared the EU vs. US initiatives on free trade agreements. The USA's initiatives were seen to be 'very successful', while the EU was perceived to 'lag behind in this aspect'.

Politics and security

The EU's leadership in world affairs was seen by the *general public* as desirable (Figure 42). In terms of overall desirability of its leadership the EU, together with Russia, fell only behind China. The EU lagged behind the US and China in terms of how respondents gauged the likelihood that it will take a strong leadership role in the future. In China, most respondents saw the US and China as the major players in world affairs in the future. In terms of Chinese public opinion on its performance in global peace and stability, the EU was ranked behind

the US, China and the UN. The EU's performance was seen as similar to that of Russia. Looking more specifically, the EU's performance in peacekeeping operations was regarded slightly more positively than other fields related to peace and stability, namely military operations or the fight against terrorism.

Figure 42. Desirability vs. likelihood of EU's global leadership



Note: Based on the answers to survey Q4: How desirable is it that each of the following countries and organisations take a strong leadership role in world affairs; and Q5: How likely or unlikely is it that each of the following countries or organisations will take a strong leadership role in world affairs five years from now? (N = 1410)

China's influential press *media* gave extensive attention to EU **external political actions** (it was the most visible topic for the two popular dailies, and second equal for the business daily). The EU partnership with China was in the centre of media attention in *People's Daily* and *21st Century Business Herald*. It was reported from neutral to positive perspective (one of the dominant images compared EU-China relations to a growing plant and such images carried positive connotations). The press also reported on the EU's (as well as Europe's) relations with Russia and EU actions around Ukraine's crisis (more so in the world-oriented *Global Times*). These topics attracted visible negative evaluations of the EU. Europe, in addition to the EU, was presented interacting with international organisations, and specifically the AIIB. Europe's relations with the USA received substantial media attention in China.

Internal EU politics were reported the most in the context of the politics in Eurozone and political aspects of the Greek debt problem (in *Global Times*), and Brexit in the two other papers. The EU was framed to be on the 'war path' when fighting its internal problems. Reflecting the national media portrayals of EU internal dissonance and projecting them onto

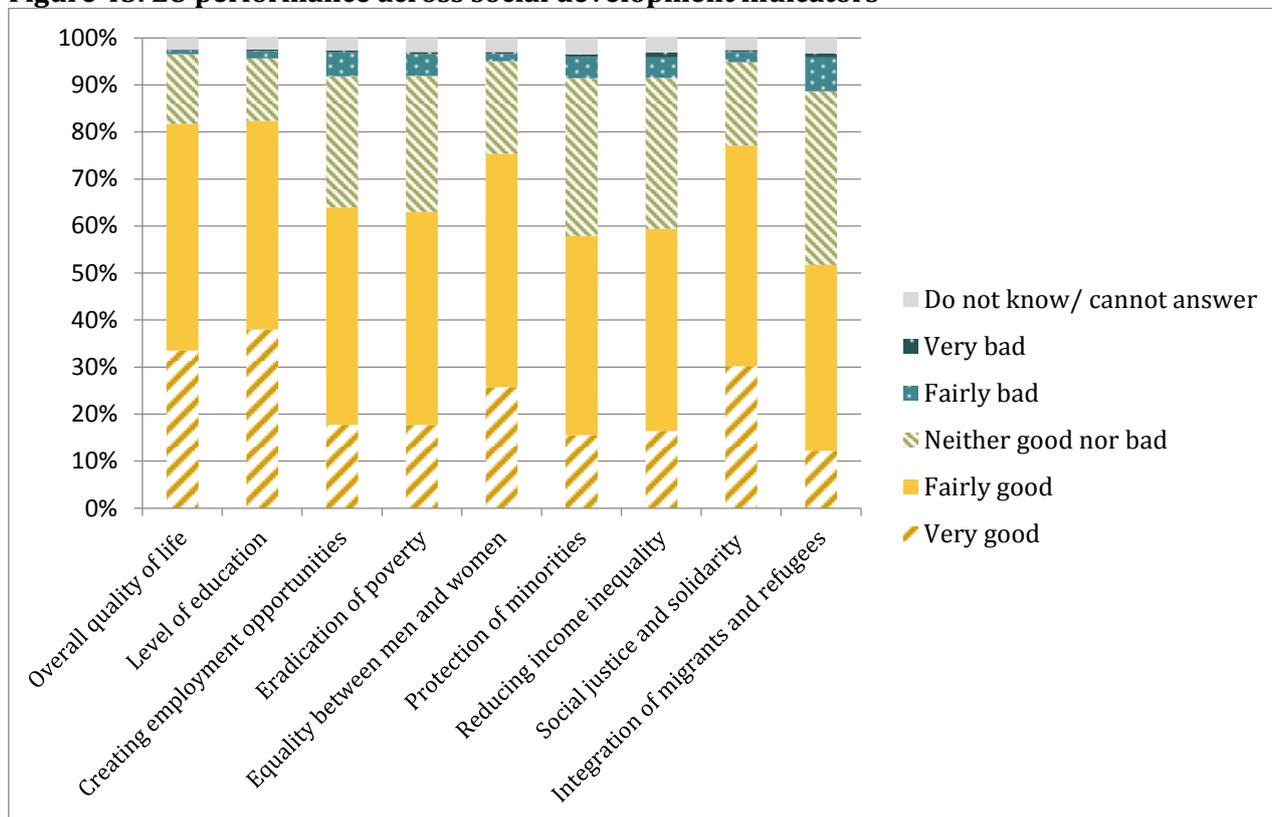
international relations, the elites report impressionistic perceptions that when ‘handling foreign relations, the EU are weakened because of the divergence among the EU Member States and the interference from other international actors.’

Development (social internal and international)

Media reporting of the EU’s efforts in **international development** was miniscule. In parallel to the media’s low attention to this issue-area, Chinese *public* viewed the EU as less important than China, the US or the UN. The EU was also seen lagging behind the World Bank. However, Chinese see the EU as playing a more important role in this respect compared to the remaining countries used for comparison. For the rare *elites* who reflected on this issue, the World Bank and the UN were also more visible than the EU in international development.

Speaking about **internal social development**, the areas where the EU was seen as most effective were overall quality of life, level of education and social justice and solidarity (Figure 43). The areas where it was seen as performing less well were integration of migrants and refugees and protection of minorities.

Figure 43. EU performance across social development indicators



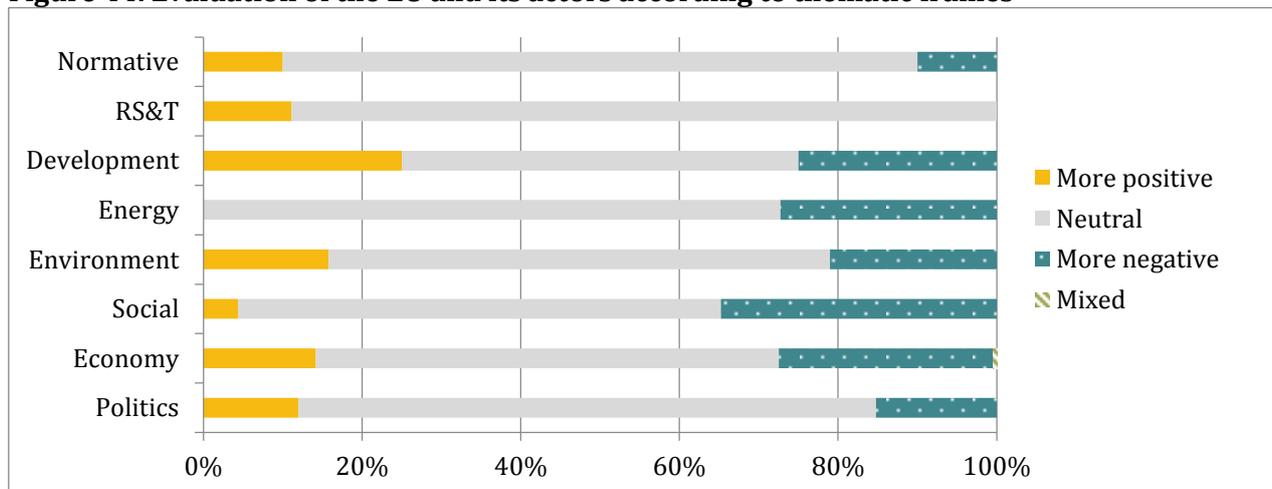
Note: Based on the answers to survey Q17: Generally speaking, how well do you think the European Union performs in each of the following areas of social development? (N = 1238)

Migration, multiculturalism and human rights

The third most visible *media* profile of the EU in the two popular papers was about the Union’s social and cultural affairs. Within this frame, the most frequent topic was irregular **migration** into the EU. This topic, while still reported from a neutral perspective, contained a higher share of negative evaluations than positive ones. Another visible issue was health

care in the EU, especially more advanced food safety standards (compared with those in China). Those representations attracted neutral-to-positive evaluations (Figure 44).

Figure 44. Evaluation of the EU and its actors according to thematic frames



Echoing the media profile, *public opinion* survey showed that the EU's dealings with refugees (and displaced people) were seen as less positive when compared to the overall fairly positive evaluation of the EU's performance in other fields. This area clearly stands out as the one that respondents least often evaluated positively. The EU's performance in the integration of migrants and refugees was also seen least positively among other areas of social development.

Environment and energy

Three months of media observation featured an extremely low level of attention towards issues of EU **environmental and energy policies** in the two popular papers. In contrast, environment was the second most visible frame in the business paper in this sample with the EU's environmental action being reported as frequently as the EU's political action (and more than social and culture). This interest in reporting EU environmental action was mainly related to green economy and carbon emissions trade. When reported, the EU was mentioned in the context of EU carbon trading schemes, and often from a negative perspective. For example, in *21st Century Business Herald*, negative evaluations focused on EU's actions on environment, especially on 'EU's lack of contribution in emission reduction' in international climate change cooperation. As one elite explained, 'The EU can be regarded as a role model. However, it has over-exaggerated its role and, to some extent, uses its advantage in this aspect to request other states to do things with unreasonable requirements.' Only a handful of negatively coloured reports were found in *21st Century Business Herald* and *People's Daily* on the EU's energy reliance on Russian supply.

In the eyes of the *general public*, the EU's role in fighting global climate change and protecting the environment was seen somewhat better than its role in maintaining global peace and stability. The EU in this respect was ranked slightly behind the US, China and the UN. Protection of the environment and the fight against climate change were among the fields in which the EU was seen by the respondents as standing out the most.

Impressions from the *elite* interviews indicated that the Chinese stakeholders recognised the EU to be 'very successful in shaping people's perception that the EU is making great efforts in dealing with the climate change.' Another interviewee commented that specifically in climate change affairs, the EU is 'very strong because it can somewhat respond to China's needs and utilize the public opinions to promote resolution of the issues.' The awareness of

China-EU joint initiatives in facing climate change were reported by the elites. Nevertheless, some negative views came through when the interviewee commented on the EU anti-dumping measure against China's solar products in 2013.

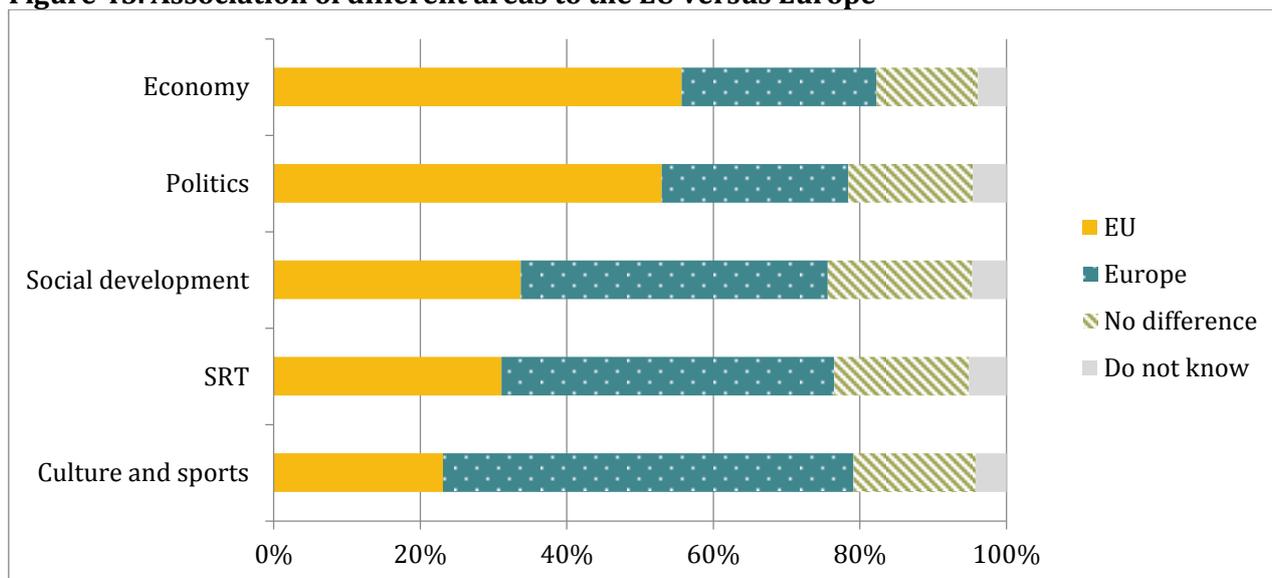
Research, science and technology

For all three newspapers EU news on **research, science & technology** went largely unreported. Europe, on the other hand, was portrayed as a source of advanced science and technology more strongly. All three Chinese dailies reported on new technology and technological development in Europe, especially *Global Times*. *People's Daily* also published a few articles about research conducted by Europeans. For example, Europe's achievements in space and nuclear science/ CERN were noted.

Echoing this low media profile, the *general public* saw the EU in the field of innovation and technologies as lagging behind the US and China. However, most of the respondents in China felt that the EU performs fairly well in various fields of technology, as well as science and research. Respondents also agreed that the EU is an important partner in science, research and technology in China.

In terms of how respondents differentiate EU and Europe, science together with culture and sports as well as social development were associated first and foremost with the term Europe, whereas economy and politics were firstly associated with the EU (see Figure 45).

Figure 45. Association of different areas to the EU versus Europe



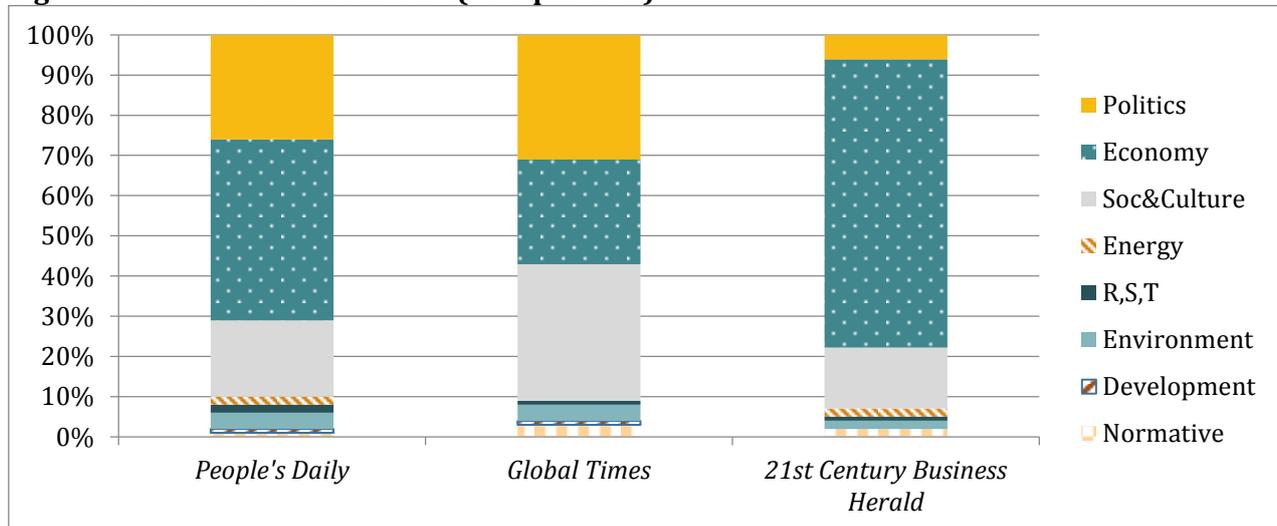
Note: Based on the answers to Q23: Some people think about Europe, whereas others think about the European Union when talking about economy, politics, culture, sports and other areas. In your case, which term – Europe or the European Union - comes to your mind first when you think about the following subjects? (N = 1410)

Culture

In the eyes of the Chinese general public, such areas as economy and politics were first and foremost associated with the EU, whereas culture, sports, science and social development were primarily associated with Europe. This would suggest that in China the EU is mostly seen as an economic and political union. Reflecting this vision, it was the *media* dataset 'Europe' that featured abundant examples of actions in **cultural affairs** vis-à-vis the 'EU' dataset (in *People's Daily* and *21st Century Business Herald*). In these two publications, the most frequent topic under 'social and cultural affairs' was European arts and culture. Those

aspects of European culture reported covered art, literature, cuisine, architecture and film. In *Global Times*, culture was the second most visible social topic (Figure 46), while the most visible theme concerned lifestyle - Europe as a popular tourist destination. This was the second most visible topic in *21st Century Business Herald*.

Figure 46. Thematic distribution (Europe news)



These media frames were paralleled by *public opinion* – respondents from China generally saw Europe as an attractive tourist destination relating to this sentiment personally and for Chinese tourists in general. Even though public opinion respondents evaluated all areas related to EU culture very positively, they were more likely to choose luxury goods and clothes, arts, monuments and museums as well as modern architecture over food and cuisine, sports, history, cinema and theatre. These opinions are in line with those on the EU's performance in the entertainment industry, which is evaluated the least positively compared to other economic activities. In relation to other questions, respondents also tended to agree less often with the statement that Europe is a producer of music and arts popular in China.

For *elites*, in the issue-area of culture, the EU was perceived as 'comparatively active with big influence in culture and society areas.' For stakeholders, the EU's profile became visible through joint cultural events (often initiated by the EU Member States), e.g. China-France cultural festival, France-China cultural exchange programme, or the UK-China Year of Cultural Exchange 2015.

Education

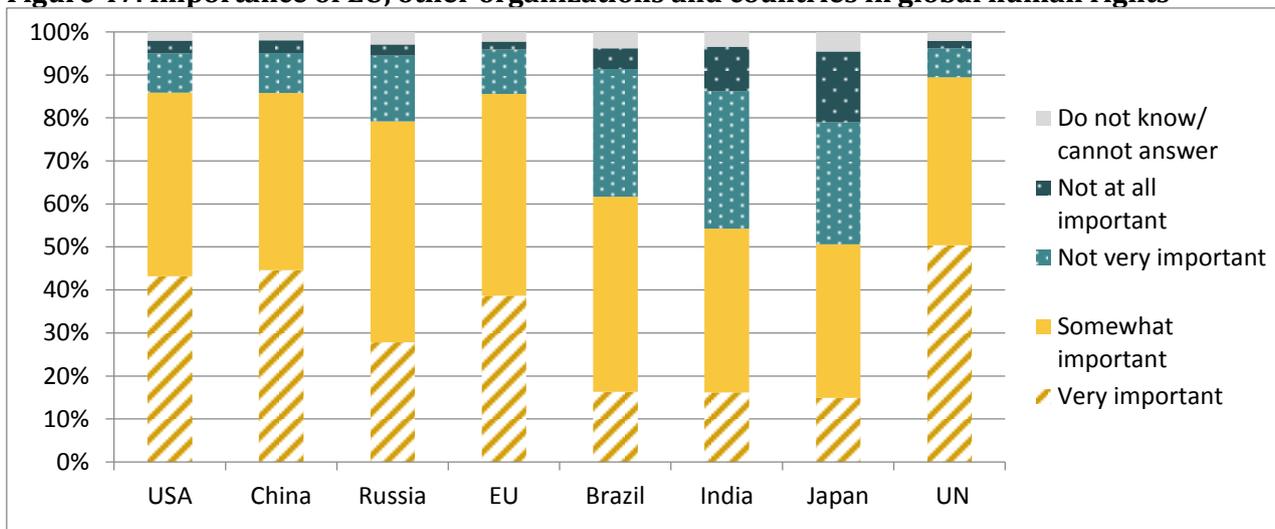
Public opinion respondents viewed the EU positively in terms of the level of **education** of its population. This was seen as the area of social development where the EU performs best. The EU was also seen as an important partner for China's educational exchanges. Yet puzzlingly, the Erasmus programme was among the least visible images describing the EU.

Interviews with *elites* illustrated that a small cohort interviewed possessed awareness about numerous EU initiatives towards China in the education field: e.g. EMEA programmes; China Europe International Business School (CEIBS); book donations by the EU to universities in China; the development of Europe centres in various Chinese universities; Jean Monnet Chair Professor programme; or FP7. EU Member States' educational initiatives also featured in the interviews. German DAAD educational exchange with China, China-Germany joint professional training programme and the China-Britain MA students exchange programme (together with British Council) received special mentioning. The EU was seen by elites to be 'strong in cultural and academic exchanges, higher educational cooperation, and media.'

The EU as a norm-setter

The EU **normative profile** was extremely low in the *media*. A small number of ‘normatively-flavoured’ articles in the ‘EU’ sample presented norms of democracy, food standards and human rights in EU political, environment and social news. In the ‘Europe’ sample, Chinese papers featured a long list of norms but each was given very low visibility. Among those were sustainable development, human rights, liberty, peace, good governance, anti-discrimination. This modest media profile could be one factor behind the *public opinion* in China: respondents saw the UN as the most important actor in the field of promoting and defending human rights worldwide (Figure 47). The role of other countries was seen as substantially less important than the role of the UN, the US, China and the EU. Respondents evaluated the EU’s performance in gender equality as the most positive among other human rights related issues listed in this survey question.

Figure 47. Importance of EU, other organizations and countries in global human rights



Note: Based on the answers to survey Q10: In your view, how important a role do each of the following countries or organisations play in promoting and defending human rights worldwide to protect human dignity, freedom, equality and solidarity? (N = 1410)

Commenting on the perceptions of the EU as a ‘normative’ power, *elites* shared somewhat critical views. For some, the EU’s normative persona was less visible than that of the USA: ‘they [Europeans] are increasingly active, but less visible than the US.’ For others, the EU has an ambiguous normative identity: ‘European normative efforts have some influence. But the EU sometimes sways between its pragmatism and value diplomacy.’ For some, the influence of the EU in the normative area was not convincing: ‘it is less influential and comparatively weaker in social areas, such as NGOs, foundations, labour unions, etc.’ Others shared the view that the EU’s claim to the status of being a ‘normative power’ was questionable: ‘the EU and its Member States promote value diplomacy, putting emphasis on quality, justice and sustainable development. But the EU’s self-claim as a normative power is not convincing and maybe counterproductive to its image.’ Finally, for some there was a perceptible clash between the EU and China in the dialogue on norms and values rooted in the perceived top-down style of the EU’s interaction with China in this issue-area: ‘China is learning from European social democracy. But Chinese values do not resonate with the European ones because the EU claims itself as a teacher, while taking China as a student. But the EU’s relationship with China is not relationship between a teacher and a student.’

In contrast, more positive views were rare. For example, a media interviewee noted that ‘the EU policies resonate with conditions and needs in China, because China needs to learn

much more from Europe.’ Another example of a positive reflection came from a youth group interview. One of its participants saw the EU normative outreach to China as ‘definitely good and positive, including the EU’s diffusion of such values as democracy and human rights towards China, because they are good to Chinese people, though not welcomed by government.’ Another participant noted ‘the EU’s engagement with China’s building of a legal society.’

3.3.4 Local conditions: explaining the perception of the EU in China

Perceptions are a result of interactions between internal (China-specific) and external (EU-specific and global) factors. In the eyes of the interviewed elites, the image of the EU in China is influenced firstly by a dominant perception of Europe as a culturally attractive location. These are reinforced by the influential media. This study found that when the Chinese press reported Europe (exclusively) vs. the EU (exclusively) it evidenced more neutrality in Europe’s representations compared with the EU portrayals, and accompanied by less negativity. A significant share of Europe’s positive coverage referred to European culture (film, cuisine, architecture) and Europe as a tourist destination. Future studies on EU perceptions in China could specifically focus on the multifaceted perceptions of the EU/ Europe and European states in the field of culture. A well-shaped targeted dialogue on culture matters in China is argued to be a vehicle for improving the EU’s Public Diplomacy performance.

Knowledge and personal experience were also listed behind the formation of EU images, especially among the younger generations. Respondents mentioned education and training, as well as tourist experiences as factors shaping young student perceptions of the EU and its policies. General public respondents already regarded Europe as an attractive tourist destination for themselves and for Chinese tourists in general. Future studies could trace EU images in the Chinese educational discourses (secondary and tertiary levels) as well as systematically study perceptions of the EU among those who visited Europe/ EU (as tourists, exchange students, workers, etc.) vis-à-vis those who have not experienced first-hand contact. EU Public Diplomacy outreach could include a more intensive work with the Chinese who returned from the EU.

Another factor influencing the images of the EU in China is local media preference to report the EU with numerous ‘local hooks’ – and in the positive light. This is observed in the reportage about the highest levels of interactions (e.g. EU—China Summits, or celebrations of anniversary in bilateral relations), but not only. In China, the positive consequences of ‘One Belt One Road’ were also discussed. They were seen to further strengthen the connection and cooperation between China/ Asia and Europe. Europe was also reported as a coveted destination for Chinese investments. Future studies on EU images in China could focus on the newsmakers with the view to understanding the driving forces behind this extensive ‘grounding’ of the EU in local discourses and facilitate and sustain such a profiling of the EU.

However, the political context is seen as the overarching factor. In the eyes of elites, the ‘Chinese government places restrictions on media and NGOs.’ Language is also a factor. English is not used as a common language in cultural and educational exchanges between China and the EU. Cultural differences are cited among the main factors that shape the perceptions. The EU’s promotion of certain values and its policies on arms embargo and denial of China’s market economy status shape Chinese perceptions in a negative way. ‘Partial diluted’ coverage in the mainstream media also constraints the Chinese people’s understanding of the EU. Finally, lack of mutual empathy, different levels of development,

cultural diversity, wrong or inaccurate translation, misunderstanding and mistrust add negative tones to the EU's images and perceptions.

3.3.5 Recommendations for EU Public Diplomacy

Most of the survey respondents in China reported positive attitudes towards the EU (65 per cent vs. 31 per cent who saw the EU in a negative light). Compared to other countries used in the survey, the EU was among the most positively viewed (below only China itself). Compared to other international organisations, the EU was evaluated positively, behind only the UN and the WTO. The EU was most commonly described as multicultural and modern; and least often described as hypocritical, aggressive or arrogant. Among foreign actors, the EU was most often seen as trustworthy. This overall positive view on China's relationship with the EU corresponds with answers to more specific questions about economic, political and educational relations with the EU. Such a positive profile among the general public in China constitutes a valuable asset to EU Public Diplomacy circa the crises. This potential should be captured and capitalised before the crises modify the image significantly. Importantly, regression analysis shows that the likelihood of respondent having an overall positive view of China's relationship with the EU is somewhat higher for those from a higher age cohort. This finding indicates that EU Public Diplomacy in China must elaborate initiatives directed towards younger members of the society. Interestingly, when asked to evaluate the EU's performance in different areas of international importance, respondents within the age group of 25-34 were likely to answer more positively than the respondents from other age groups. As such, the future EU Public Diplomacy towards younger members of the public could use this issue-area for building outreach.

Three areas are proposed to boost the EU's positive images. Firstly, culture is the area where the study observed images and perceptions that indicate readiness for collaboration. Programmes initiated by both the EU bodies as well as EU Member States – undertaken in synergy or separately – will continue to impact images and perceptions of the EU and wider Europe. EU Public Diplomacy programme in China should continue to develop a scheme in which cultural initiatives of both types resonate with each other. Importantly, this project's findings are consistent with relevant research that has also stressed the role of culture in EU-China relations. Specifically in regard to China, this topic has been analysed in great detail in the EU-China Handbook. In words of one elite, the EU Public Diplomacy should continue to 'promote the profile of the EU and to make the outside world have a better understanding of the EU. To increase mutual understanding by cultural exchange and people-to-people's dialogue.' Sister-city programmes were specifically mentioned in this context as a successful avenue to build more meaningful people-to-people links. Several elites mentioned that the EU visa policy should be as flexible as the US one to better facilitate people exchanges and contribute to effective Public Diplomacy. Otherwise, the EU risks losing Chinese tourists, investors and students vis-à-vis other countries with more favourable visa policies.

Secondly, the perceptions registered a view among elites and public that the EU is an important partner in science, research and technology in China who is performing well in this area globally (a view not reflected in the media). As such a more diverse outreach in terms of RS&T and greater public visibility to *joint* EU-China collaborations in this field is recommended for EU Public Diplomacy direction. Related to this, the exchange programmes between the tertiary students from China and the EU should be expanded and extended. It is thus recommended boosting the exposure of tertiary level students in China to the various educational opportunities in the EU (including such programmes as Erasmus). EU Member States have the potential to rival the US in becoming the main destinations for Chinese

students to pursue their tertiary education degrees abroad. Importantly, it is not only students who should be the focus of the EU education diplomacy, but also academics as well as think tanks. This is an elite cohort that has a unique role in shaping internal opinions on the EU among the future generations of national leader, as well as current policy makers and the general public.

Thirdly, protection of the environment, human health and the fight against climate change were among the fields in which the EU was seen in China to stand out (although not in the media coverage). EU Public Diplomacy should prioritise this theme in dealings with China devising a variety of outreach programmes that continue to inform on the EU's advances yet at the same time draw explicit parallels to the Chinese conditions and circumstances. It should not be an interaction a-la 'teacher teaches a pupil', but a dialogue among the equals.

The EU as a norm-sender/ diffusor of values proved to be a sensitive and controversial image. Avoided by media, this topic elicited a mixed reaction from the public and elites. Research demonstrates that the most fertile areas for the normative dialogue carried by the means of EU Public Diplomacy could be protection of the environment, human health and the fight against climate change. These interactions should depart from Euro-centric positions and be designed with a conscious effort to listen to alternative positions and not to impose/ preach at the Chinese counterparts. The 'top-down' normative dialogue should be avoided. The positive as well as counter-productive effect of the EU as a normative example should be further explored.

Elites identified a limited number of local bodies who would be EU Public Diplomacy partners, including universities and think tanks, labour unions, NGOs focusing on the issues in civil rights, and media. They are seen as the most ready to assist in promoting the images and profiles of the EU and its Member States and to disseminate its norms and values. The role of newsmakers is of special note here. The Chinese news media heavily relies on local newsmakers and news sources when reporting the EU and Europe. In this light, EU Public Diplomacy should develop a multi-level outreach programme to local journalists and gatekeepers. Importantly, several areas where the EU could raise its profile (environment, energy, and the fight against climate change, education) have been under-reported in the Chinese influential media. A more sophisticated outreach towards the media professionals is recommended (please, see section 6.2 of this report). With the media analysis demonstrating a readiness by the Chinese newsmakers (albeit modest) to use diverse external news sources (not only the main transnational news agencies), there is a potential for EU Public Diplomacy to offer access to news sources that profile the EU from an in-depth perspective. The most visible Chinese actors reported by the local media interacting with the EU were China's top officials – Premier Li Keqiang and President Xi Jinping. Less visible local interlocutors were Yang Yanyi, Hauwei, individual and European Union Chambers of Commerce and China's Ministry of Commerce among institutions/ organisations.

Recommendations for EU Public Diplomacy from practitioners on the ground in China

From the perspective of practitioners at the EU Delegation on the ground there are several areas where EU Public Diplomacy should concentrate its efforts. Firstly, the practitioners noted that most successful PD approaches concern the political level. Hence, positively connoted messages on visa or enhanced trade facilitation, can be used as incentives in order to pave the way for more sensitive thematic messages. The practitioners also saw that EU Delegations could better allocate funding as they are well-informed about the national and regional context and the main actors within it (e.g. when DEVCO funds projects, EU Delegations are not involved in any monitoring processes). Several challenges were noted,

for example feedback loops between EU Delegation and EU Commission may take long time. In this context, joint outreach activities across DGs, Brussels HQ and Delegation and for a better cooperation with Member States were considered particularly important as only “strong, coordinated” activities attract attention. In general, practitioners pointed out that the EU should focus on its strengths and areas where it is actually perceived as a point of reference (e.g. combating climate change, clean energies, etc.) when communicating its messages. Finally, in their eyes, more creative online content must be developed and distributed as this is the most effective way to reach Chinese general public.

3.4 India

This Country Chapter presents a synthesis of the India-specific findings of media analysis; elite interviews 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 India according to the research criteria applied – namely visibility; actorness and local resonance; and norm-setter. Moreover, in the section on actorness and local resonance, we discuss these according to the themes analysed in this research: economy and trade; politics and security; normative and human rights; development – including the social internal and international dimensions; migration, multiculturalism and human rights; environment and energy; science, research and technology; culture; and education. The final section before policy recommendations looks at the local conditions that explain the perception of the EU in India. Finally, we conclude the chapter with recommendations for Public Diplomacy, including a subsection on recommendations in the eyes of practitioners based at the EU Delegation to India.

3.4.1 Sample

Public opinion

The survey was coordinated and analysed by the Public Policy and Management Institute (PPMI) and conducted by TNS Global. The respondents in India were surveyed in Hindi, Bengali, Tamil and Kannada. Data collection took place in August 2015. The survey was designed to be nationally representative with regards to age, gender and region. The survey covered a total sample of 1,056 individuals within the 16-65 age group.

Media

The media content analysis was designed, supervised and coordinated by the National Centre for Research on Europe (NCRE), University of Canterbury, New Zealand, and conducted by local researchers trained by the NCRE. Two popular prestigious papers: *The Times of India* and *The Hindu* and a business newspaper *The Economic Times* were monitored daily between April 1 – June 30 2015 using e-search engine Press Display to ensure high accuracy in data collection. Two separate datasets were collected over the period of observation – ‘EU’ (310 articles) and ‘Europe’ (449 articles). Key search terms for dataset ‘EU’ included (with acronyms) ‘The European Union’, ‘The European Commission’, ‘European Parliament’, ‘European Court of Justice’, ‘European Central Bank’, ‘European Presidency’, ‘Council of the European Union’, ‘Eurozone’. The key search terms for dataset ‘Europe’ were ‘Europe’ and ‘European’.

Elite opinion

The NFG coordinated the interview programme and designed the questionnaires in close coordination with the Country Experts and the project partners. The NFG was also responsible for the training of the Country Experts and supervision of the implementation of the interviews. The interviews itself were conducted by the Country Experts. Interviews have been conducted as a source to identify upcoming trends and to cross-check findings. They are non-representative due to their current scope and should be considered as a tool for future evaluations in a representative volume. The NFG chose a three-phased approach: in Phase I, two transcripts were due until June 6; in Phase II, five interviews were due until July 15; and in Phase III, five interviews were due until August 17. The NFG was in charge for the coding of the transcripts and the provision of the results to the project partners.

Interviews in India were conducted in English and transcribed by the Country Experts. The Country Experts chose to interview 15 experts (Youth (2), Academia/ Think Tank (4), Business (1), Policy-maker (3), Civil Society/ NGO (4), Media (1)) and to not conduct a group interview.

Semi-structured, anonymous qualitative interviews under Chatham House Rules were conducted with all EU Delegations across the 10 Strategic Partner countries, primarily in the form of a group interview. The groups included Heads/ Deputy Heads of Delegations, Heads of Press and Information Section and/ or Heads of Political Affairs Section. Interviews lasted between 60 to 90 minutes. In India, two diplomat were interviewed in two separate interviews.

NB: two robust datasets collected in the course of public opinion survey and media monitoring allow for quantitative and qualitative analysis of data (for more detailed information, please see attached country-specific media and public opinion reports). Survey of elite opinion is impressionistic due to small numbers of the interviews. Data collected is analysed using qualitative approach.

3.4.2 Visibility

The extent of *media* reporting is perhaps the most transparent measure of the EU's visibility among the wider public. By way of comparison the volume of EU coverage was more modest than that found in the other countries – a total of just 310 news reports that mentioned the EU (average for 10 countries is 505 articles). Significantly more stories (449) referenced 'Europe' (average for 10 countries is 635 articles). If these two categories are combined *The Economic Times* (295) published the greatest number of EU/ Europe news, followed by *The Times of India* (245) and *The Hindu* (219). However, the EU was more visible than most other international organisations (except for the World Bank) and in public opinion this was reflected in generally a more positive disposition towards the EU.

Where stories appear in the newspaper also influences visibility and for all three papers studied in India EU reporting appeared predominantly in the **International section** and typically without any form of visual illustration attached (and where a photo was used the source was most likely to be AFP). Articles referencing 'Europe' were predominantly found in the **Business section** of the three newspapers. For both the EU and Europe, the majority of articles were of medium length (if slightly longer for Europe) and EU/ Europe featured mainly in a secondary role and not as the main focus (Figure 48 and Figure 49). Indeed, in less than five per cent of Europe news stories was Europe the main actor. This finding suggests that although Europe has a presence in the three newspapers, its role is muted and rarely a priority for the Indian press. Other actors are considered to be playing a more significant role in India and in the international arena.

Figure 48. Degree of centrality (EU news)

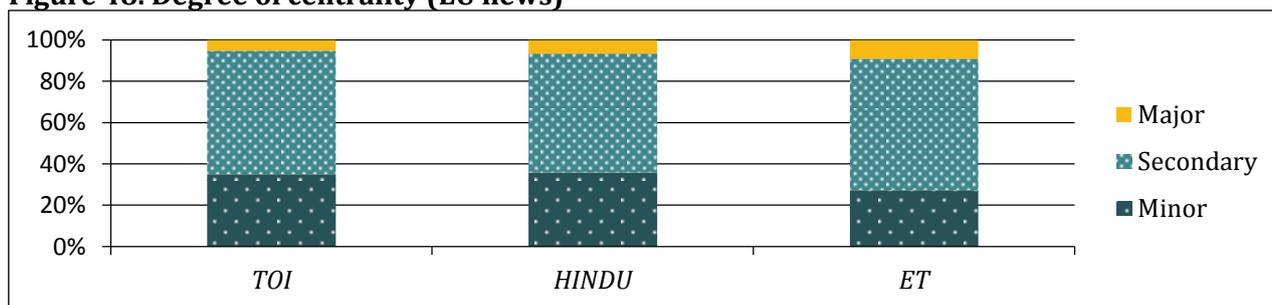
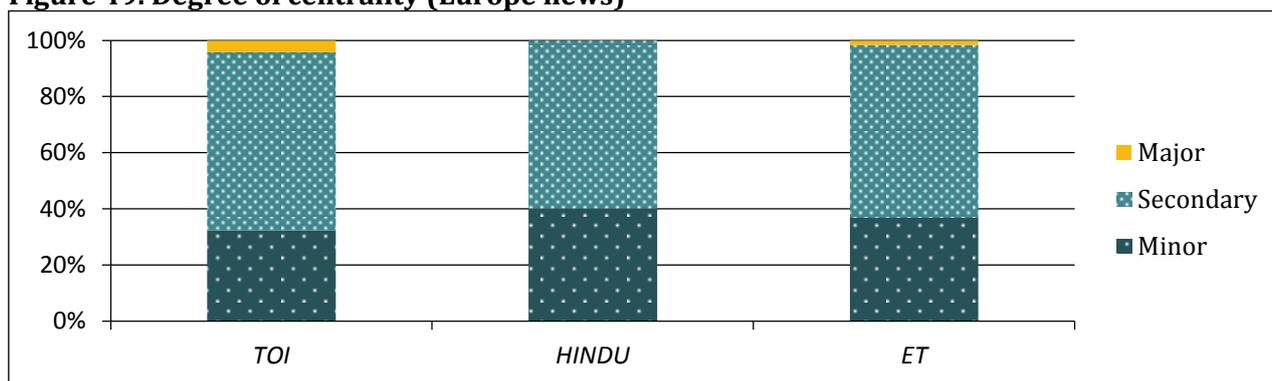
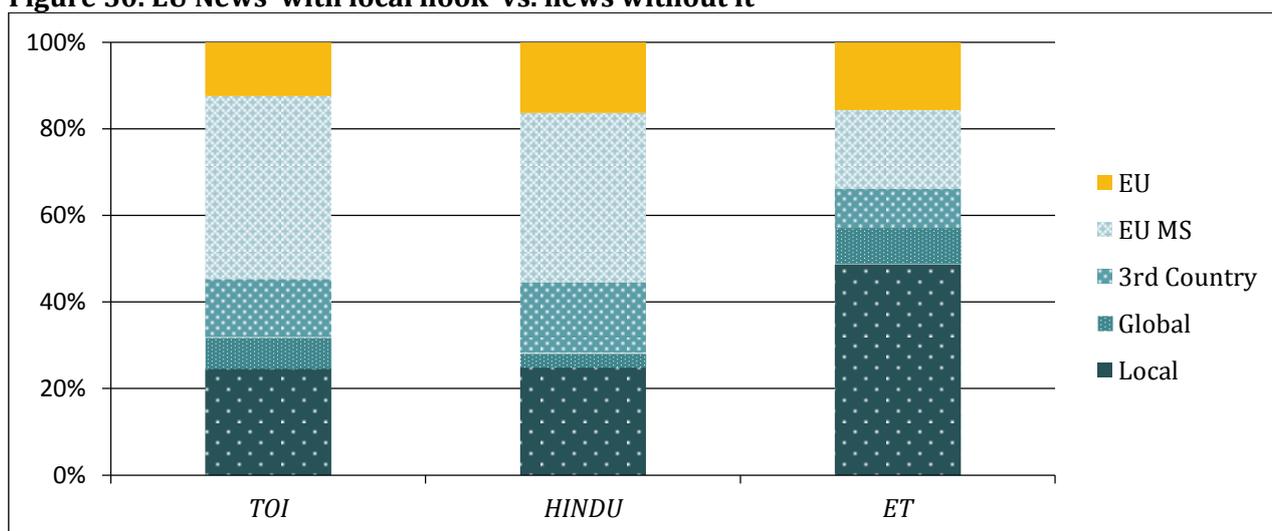


Figure 49. Degree of centrality (Europe news)



There were few surprises in who was actually visible in these 310 EU news stories (Figure 50). The UK, Greece and Germany were the most frequently mentioned Member States as were their respective leaders (Cameron 33 times; Tsipras 22 and Merkel 22). The UK appeared in relation to the election, Cameron’s gestures and promises towards Indian origin voters in Britain, the EU membership referendum, Scotland, the Eurozone and Greek debt. Germany and France were cited mostly in the context of the negotiations surrounding the Greek bailout and First and Second World War commemorations.

Figure 50. EU News ‘with local hook’ vs. news without it

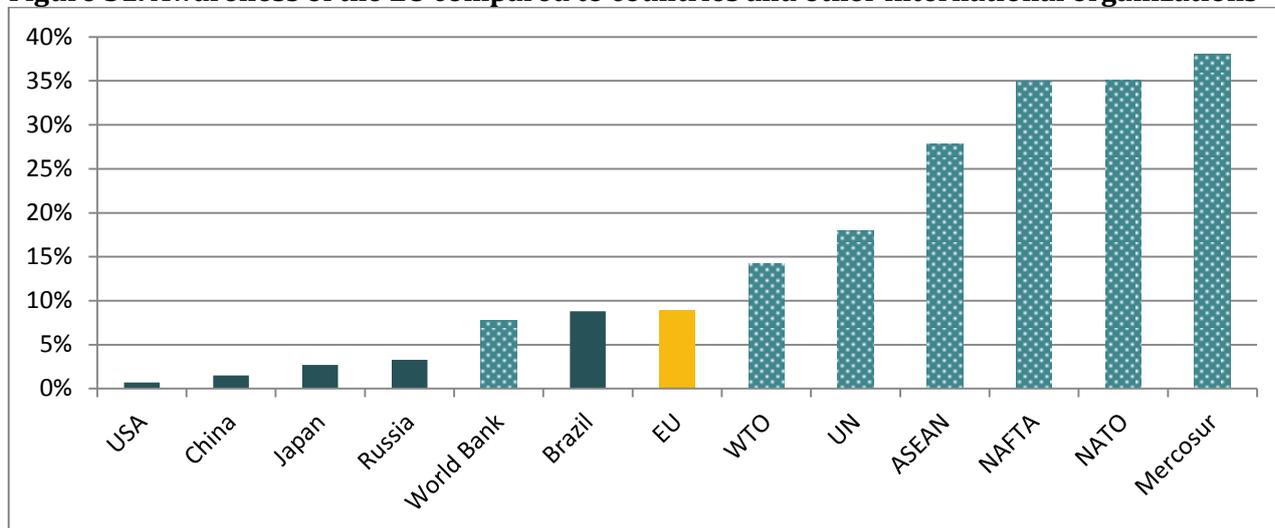


For EU institutions, it was the Commission and the ECB that led reporting with Juncker (15 articles) followed by Draghi (8 articles) and Mogherini (8 articles) the most visible officials. Juncker was mentioned in the context of the Greek debt crisis, competition laws and meetings and summits held in Belgium. ECB President Mario Draghi was reported in relation to quantitative easing, austerity measures, the Eurozone and the Greek debt crisis, while High Representative Mogherini was mentioned in relation to the migrant crisis. The EU ambassador to India was also reported on five occasions in relation to EU-India FTA talks.

Turning to *public opinion*, there was a relatively limited recognition of the EU with the survey respondents ranking the EU below all of the countries used for comparison; however, it was more visible and viewed more positively than any other international organisation (with the exception of the World Bank) (Figure 51). Despite this seeming indifference, the EU was generally viewed positively (although less so than the USA and Japan) and rarely perceived

negatively (particularly in comparison with attitudes towards China). In terms of those EU areas that respondents believed were the most widely known and positively assessed included India's economic, political and educational relations with the EU. Respondents also agreed that the EU was an important partner for India in trade, in international relations and acknowledged the importance of the EU for educational exchanges.

Figure 51. Awareness of the EU compared to countries and other international organizations



Note: Based on the answers of option 'Do not know/ cannot answer' to survey Q1: Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations? (N = 1056)

Without pre-empting the discussion on specific themes to follow, in terms of visibility some elite interviews suggested that the EU's normative positions help make it visible and distinct: 'EU emphasis on democracy, on diversity, on justice, on ecology all these do resonate with what India should be doing.' Arguably, because the EU is perceived to be very effective when it comes to shaping norms and discourses, people in India do know that there is an entity called the EU. Indeed, another interviewee went as far as to suggest that 'the EU should invest more in raising awareness about itself because generally people think only state matters in international politics but, non-state entities like the EU also matter a lot because they set norms and therefore the role of EU should be better conveyed to the people of India.' These reflections, of course, represent just a narrow educated sector of Indian society.

3.4.3 Actorness and local resonance

The EU as a local partner

The manner in which the EU was visible and was locally relevant in the *media* can be measured by the focus of domesticity: reportage of EU actions presented with a local focus or 'hook' dominated only in *The Economic Times*. In the popular newspapers (*The Times of India* and *The Hindu*) an EU Member States focus dominated. Yet the share of EU news with a local 'hook' was a close second. A pronounced visibility of a locally grounded EU news suggests that Indian newsmakers tend to frame the EU as an actor whose actions bear direct relevance to and impact on the location.

International, or non-local sources produced the largest proportion of EU news in both *The Times of India* and *The Economic Times*, with *The Hindu* having a more balanced coverage.

AFP was primarily used by *The Hindu* (27.2 per cent), while *The Times of India* and *The Economic Times* relied more on Reuters. The prevalence for non-local correspondents as well as international wires to dominate the reporting of EU (and to a lesser extent Europe) news items had an inadvertent consequence of decreasing the potential for local connections to be made (Figure 52). However, where local partners were associated with EU news stories, in all three newspapers these typically were local policy-makers followed by private businesses. The most conspicuous (but limited) media interest occurred in those reports that discussed EU-India relations in the context of the EU-India FTA talks. The majority of the news items reported in the EU dataset were neutral in tone reflecting the reality that most of the articles were factual rather than analytical or opinion pieces. News items with a positive tone were the fewest - which does not augur well for the image of the EU in India, whereas those with a negative tone accounted for around 30 per cent of the published stories (Figure 53). Thus the problem is that the visibility of the EU is minimal plus many articles display a negative tone, with obvious consequences for the perception of the EU gained by the Indian readership.

Figure 52. Sources of EU news

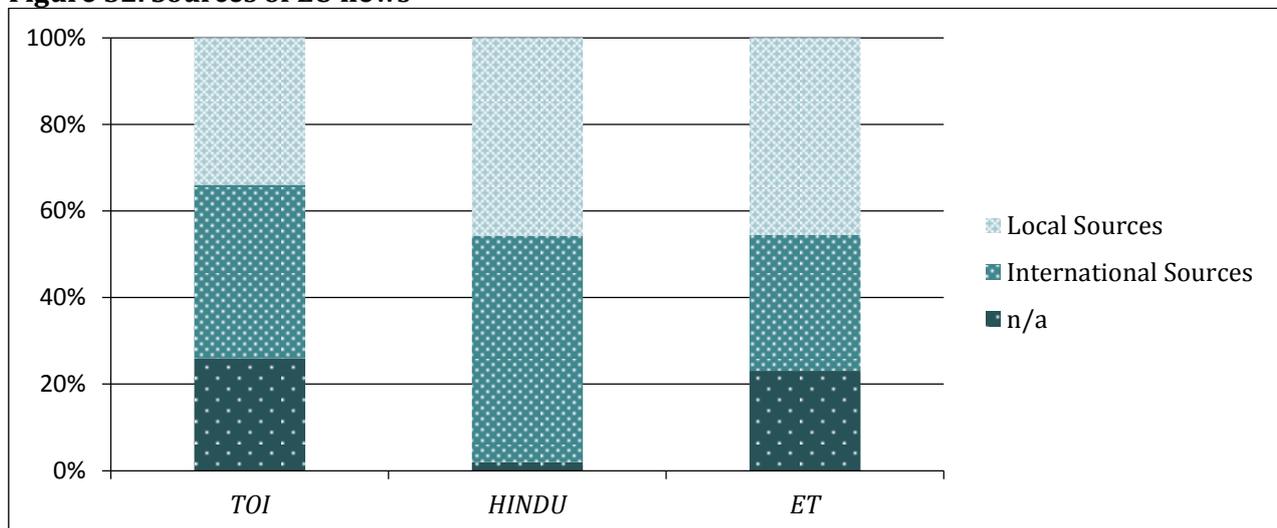
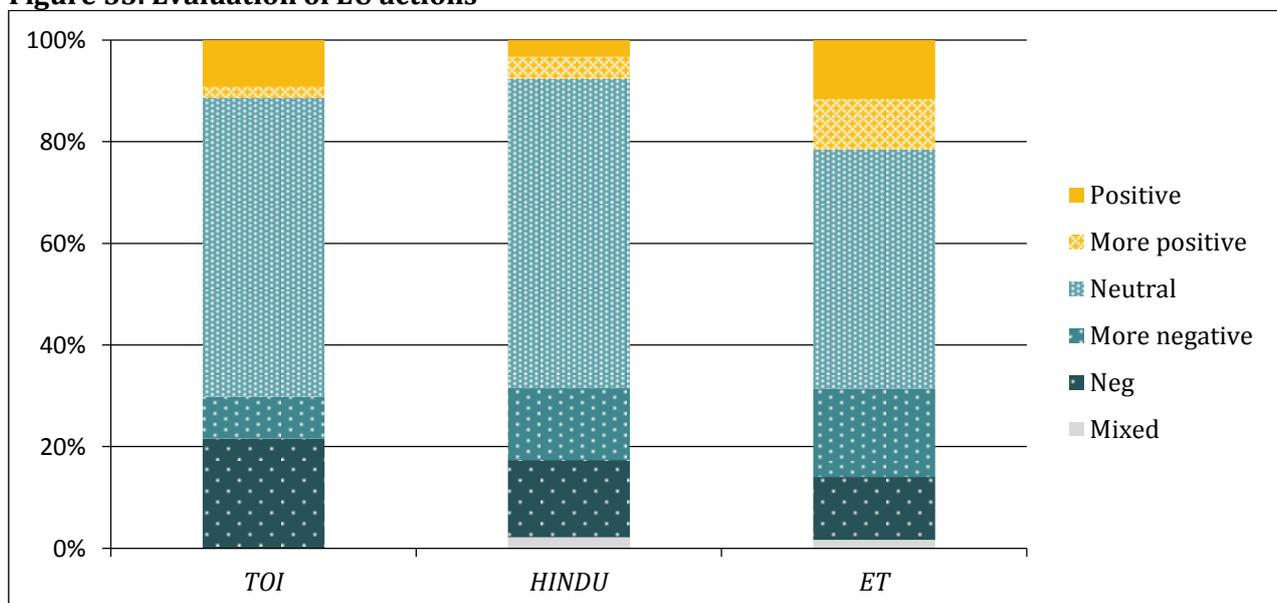


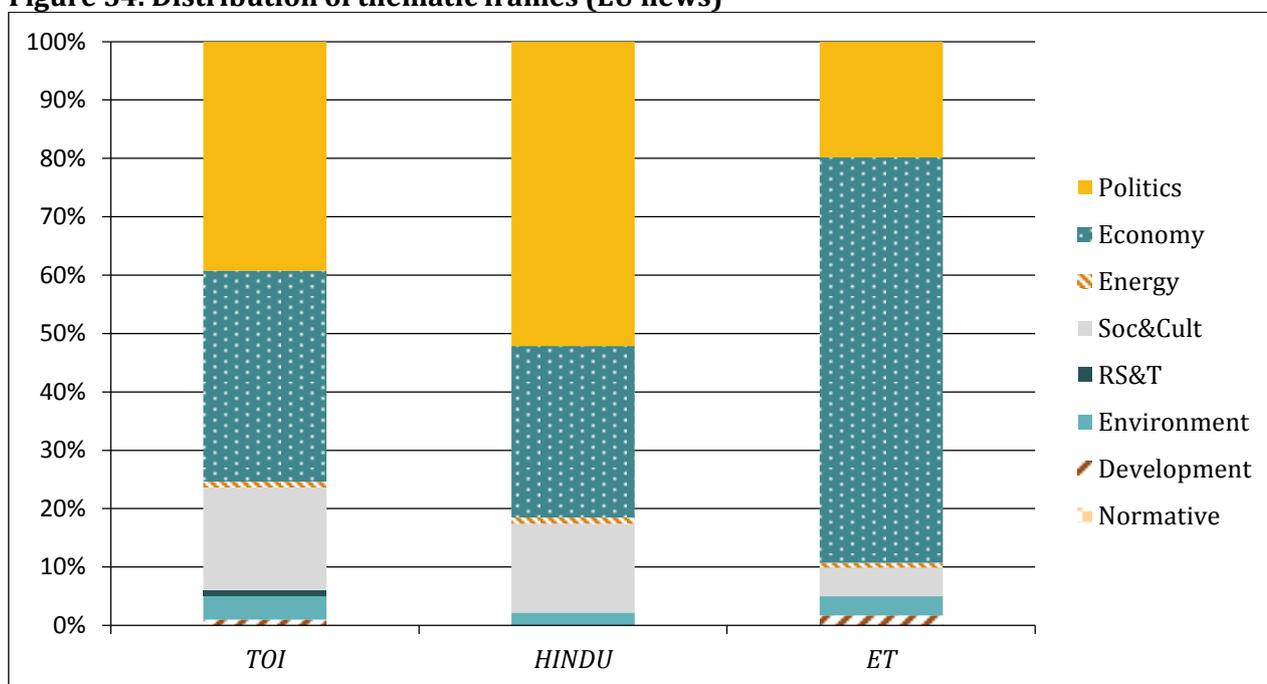
Figure 53. Evaluation of EU actions



Public opinion offered more insightful observations: the EU’s relationship with India was perceived to be healthy although lagging behind those between India and both the US and Japan. Interestingly, respondents saw their country’s relations with the EU slightly more positively than when asked to express their general view. This may signal the presence of some local issues resonating and influencing perception of the EU in India and correlate with a visible media local ‘hook’ in EU news.

What types of stories were published by the Indian media regarding the EU? Politics (39.2 per cent) and economy (36.1 per cent) were balanced in *The Times of India’s* choice of EU news items, whereas in *The Hindu* politics (52.1 per cent) dominated the economic frame (29.3 per cent) while in *The Economic Times* the reverse was the case (economic frame – 69.4 per cent; political frame - 19.8 per cent). In distant third place - across all newspapers - came social and cultural affairs (*The Times of India* 17.5 per cent; *The Hindu* 15.2 per cent; *Economic Times* 4.9 per cent). News in the energy, development and RS&T frame was minimal (see Figure 54).

Figure 54. Distribution of thematic frames (EU news)



Economy and trade

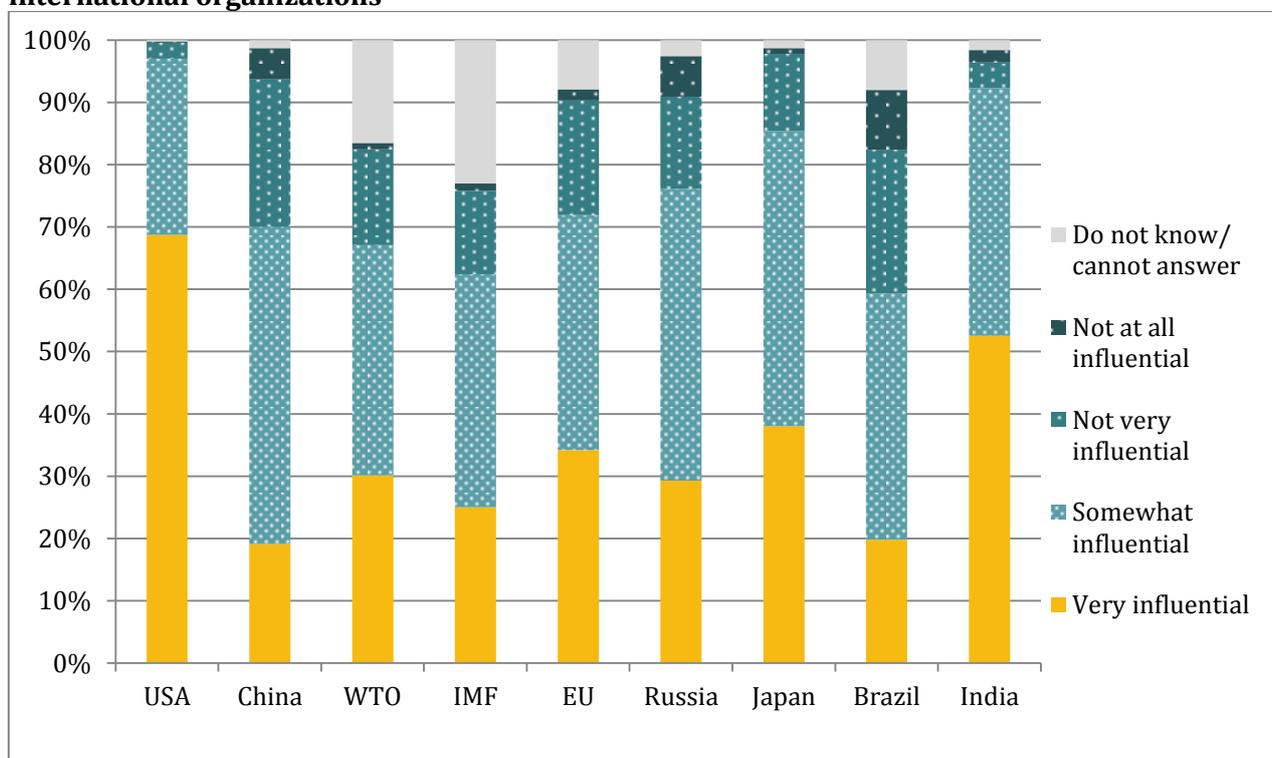
Not unsurprisingly, the *media* mostly portrayed the EU as an economic actor in the economic newspaper (*The Economic Times*), while the EU was more typically described in political terms in the two popular newspapers. The primary content of this economic profiling – across all newspapers – was the state of economy, with the second most visible economic frame business and finance. Industry was the third most reported EU economic topic for *The Times of India* and for *The Economic Times*. Inevitably, the Greek debt crisis was the most visible subject, followed by issues surrounding the competition laws.

In contrast, in the Europe dataset industry was by far the leading economic sub-frame (representing roughly half of all economy stories in all three papers). Business and finance was the second most visible frame for *The Times of India* and *The Economic Times* (covering roughly one-quarter of the stories), while for *The Hindu*, transport and infrastructure was

the second leading. Despite industry being a common and dominant economic frame, no more detailed patterns were evident. The most visible topics ranged from aviation, IT, automobiles, China-Europe trains and the 'One Belt One Road' initiative, to competition laws, the Greek debt crisis and the Eurozone. Most of news that covered EU/ European competition laws, regulatory practices in business, finance and industry carried positive portrayals of the EU and Europe. The possibility of breaking the deadlock in the EU-India FTA received a similarly sympathetic voice. Yet, negative assessments of the EU were also heard in the coverage of EU-India FTA talks and anti-trust cases initiated by the EU.

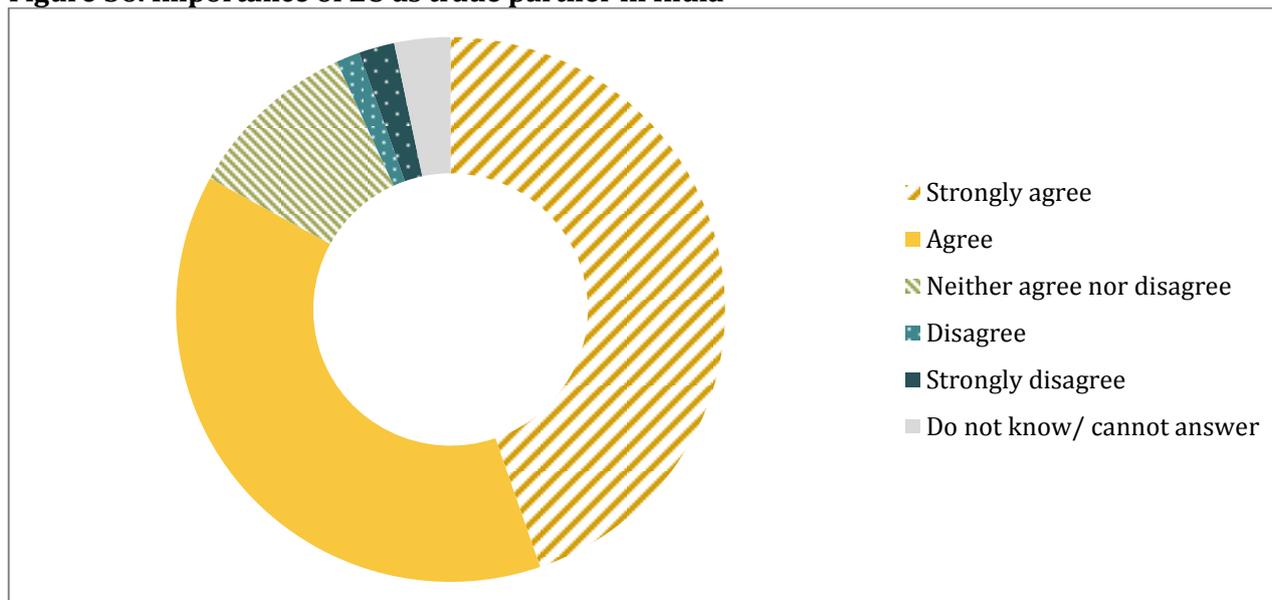
It was anticipated that the media's economic preoccupations would be reflected to some degree in Indian *public opinion*. Certainly, the Euro was the most visible image associated with the EU by the public and the ECB (together with the European Parliament) were the most recognised of the EU institutions. Furthermore, the EU was among the global players that Indian respondents saw as most influential in terms of global economic affairs (Figure 55). However, the EU was ranked behind the USA, India and Japan. The EU's economic influence was regarded as slightly more important than that of the WTO and the IMF. The EU was also perceived as performing fairly well in global trade, a view further supported by the finding that a high percentage of respondents agreed that the EU was an important trade partner for India (Figure 56). More distinctively, the survey revealed that tourism was an important economic activity for the EU and Indian respondents saw it as an economic field in which the EU performed fairly well. Indian respondents generally saw Europe as an attractive tourist destination both personally and for tourists from India in general.

Figure 55. EU's influence in global economic affairs compared with countries and other international organizations



Note: Based on the answers to survey Q6: In your view, how influential in global economic affairs are the following countries and organizations? (N=1056)

Figure 56. Importance of EU as trade partner in India



Note: Based on the answers to survey Q14: Looking from India's perspective, how strongly do you agree or disagree with each of the following statements about the economic relations with the European Union? The European Union is an important trade partner with India (N = 1056)

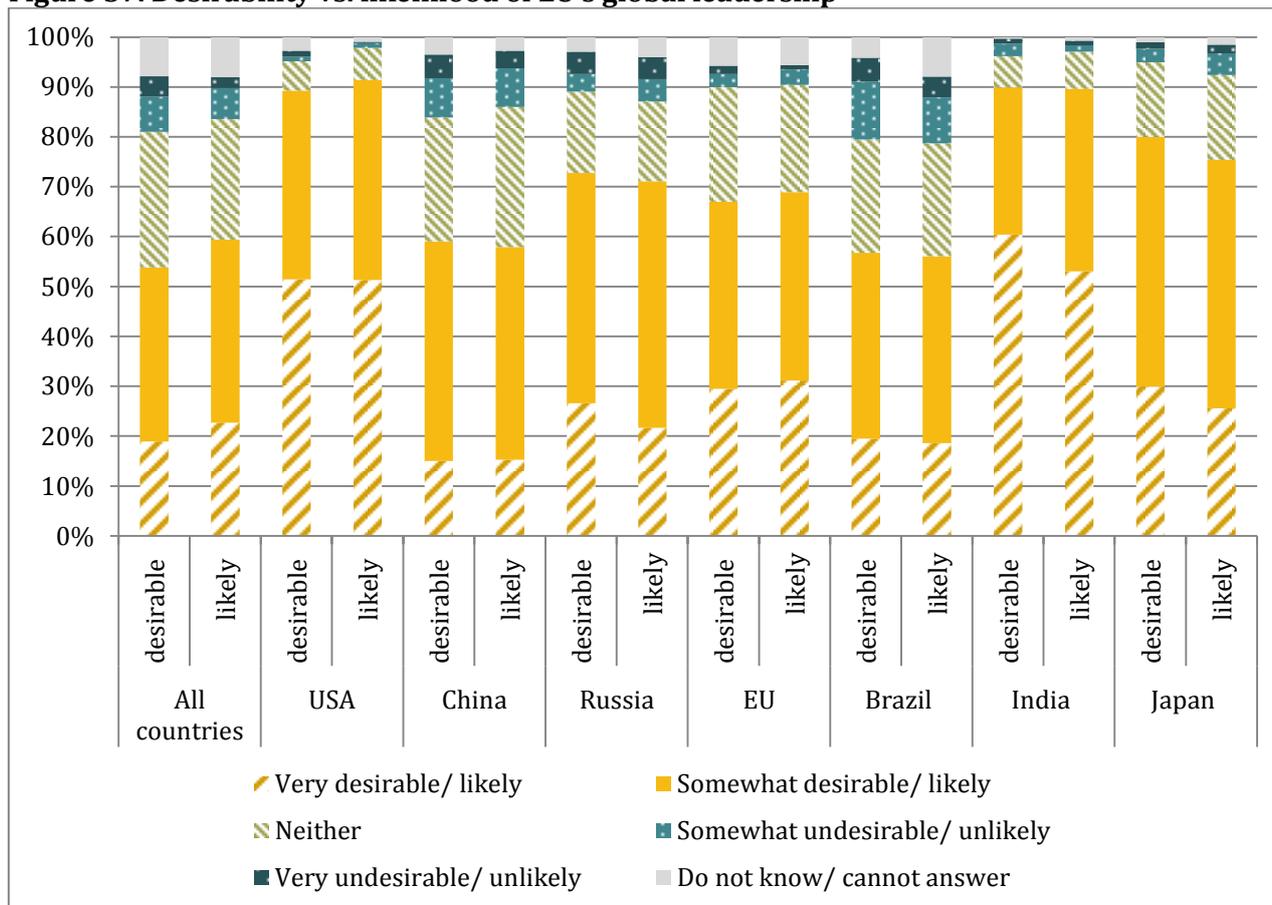
While keeping in mind the narrow cohort of stake-holders who were interviewed, overall economic issues followed by science and technology emerged as the most salient issues for Indian elites. It was noted that interactions took place across all possible areas – especially for the economy, science and technology – and there was optimism with respect to the energy sector. Precise knowledge about specific EU or EU Member State policies was absent, however. As one journalist commented: 'so, the EU is very active in economics that is for sure, because of the FTA negotiation. But in addition to the FTA negotiation, there are always other things which are happening. The EU is trying to promote economic cooperation.'

Politics and security

The EU's leadership in world affairs was seen by the Indian *general public* as desirable. However, the EU lags behind the countries used for comparison in terms of overall desirability of its leadership (see Figure 57). The EU also lagged behind the US, India, Japan and Russia in terms of how respondents gauge the likelihood that it will take a strong leadership role in the future. In India, most respondents see the US and India to be a major players in world affairs in the future. The difference between the likelihood of leadership of the EU and Russia is not as marked, but also evident.

In terms of Indian public opinion, when considering different actors performance to enhance global peace and stability, the EU was seen to lag behind India, the US, Japan and Russia. In India the EU is seen as more influential than the UN or NATO, and also China and Brazil. More specifically, the EU's performance in the fight against terrorism was regarded slightly more positively than other fields. Even this modest interest in the EU's global role was largely ignored in the elite interviews where Human rights and political and security issues did not form the core of the discussions.

Figure 57. Desirability vs. likelihood of EU's global leadership



Note: Based on the answers to survey Q4: How desirable is it that each of the following countries and organisations take a strong leadership role in world affairs; and Q5: How likely or unlikely is it that each of the following countries or organisations will take a strong leadership role in world affairs five years from now? (N = 1056)

In media, slightly more attention was given to the coverage of the EU's *external* political actions. External political news items included reports on the Iranian nuclear agreement; renewed EU trade with Havana; and upcoming EU-India summit. The EU tended to get positive evaluations in them. In contrast, negative tones were traced in the coverage of EU-Russia relations, as well as rise of terrorism and ISIS in India. In the Europe dataset, by far the most visible news concerned Europe-India relations (*Times of India* - 33.3 per cent, *Hindu* - 40 per cent, *Economic Times* - 46.6 per cent) followed by news on Europe-Russia, G7 summit, rise of terrorism, Modi's visit to Europe, BRICS summit, India-Netherlands relations and a crackdown by the Indian government on illegal European account holders in India.

In general, a negative tone emanated largely from the coverage of the EU's internal political issues- from the prospect of Brexit and the Greek debt crisis.

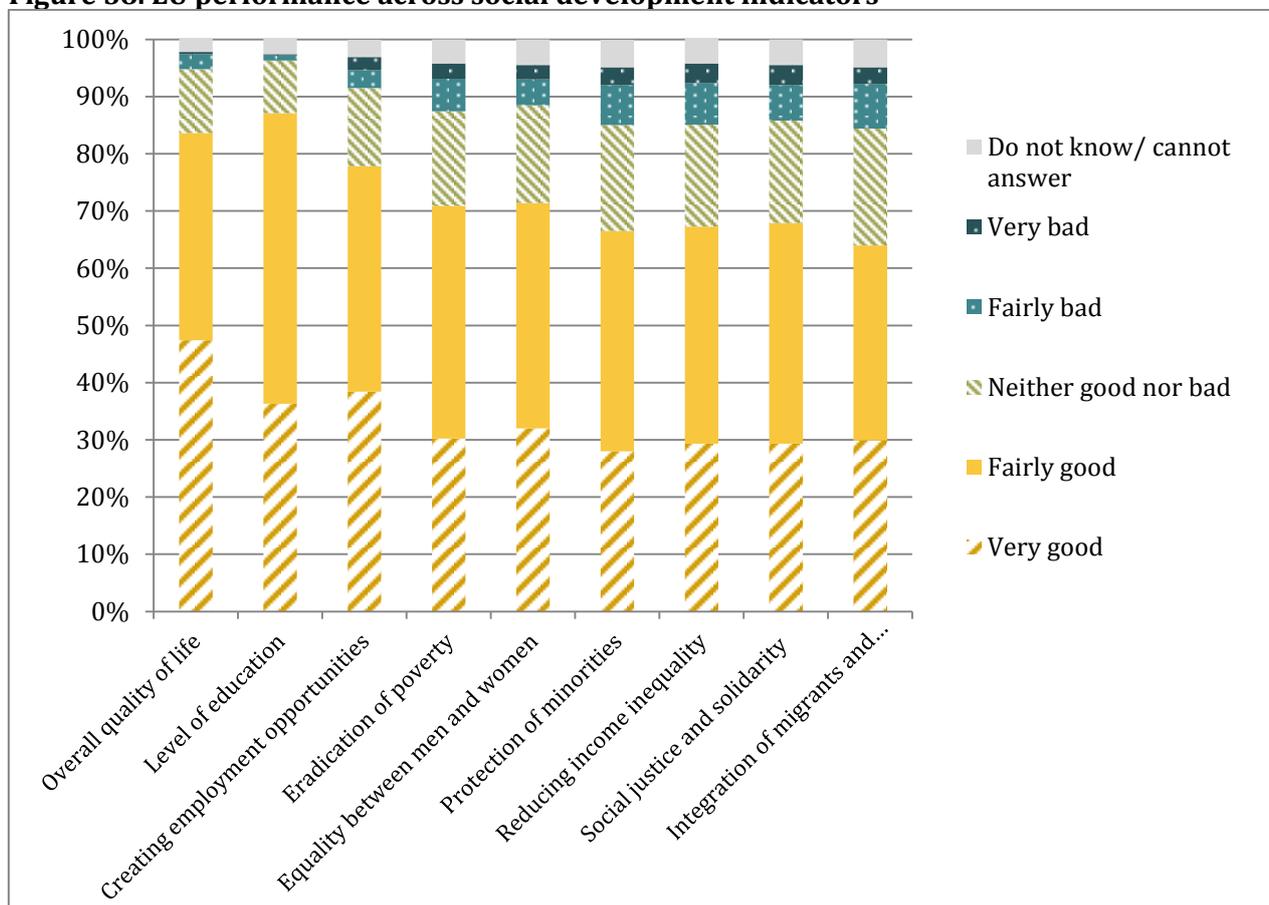
Development (social internal and international)

Social EU **internal development** stories included the *media* reports of legal acceptance of same-sex marriages and treatment of marital rape as a criminal offence. In such news, the EU was portrayed positively.

In terms of *public opinion* on more specific topics related to internal social development, India respondents saw the EU as performing fairly well in social justice and solidarity (e.g.

social rights, the public welfare system). Furthermore, the EU's performance in overall quality of life was among the most positively evaluated areas of social development (see Figure 58). Gender equality was seen as the fourth most positively perceived issue in the EU's social development field.

Figure 58. EU performance across social development indicators



Note: Based on the answers to survey Q17: Generally speaking, how well do you think the European Union performs in each of the following areas of social development? (N = 1056)

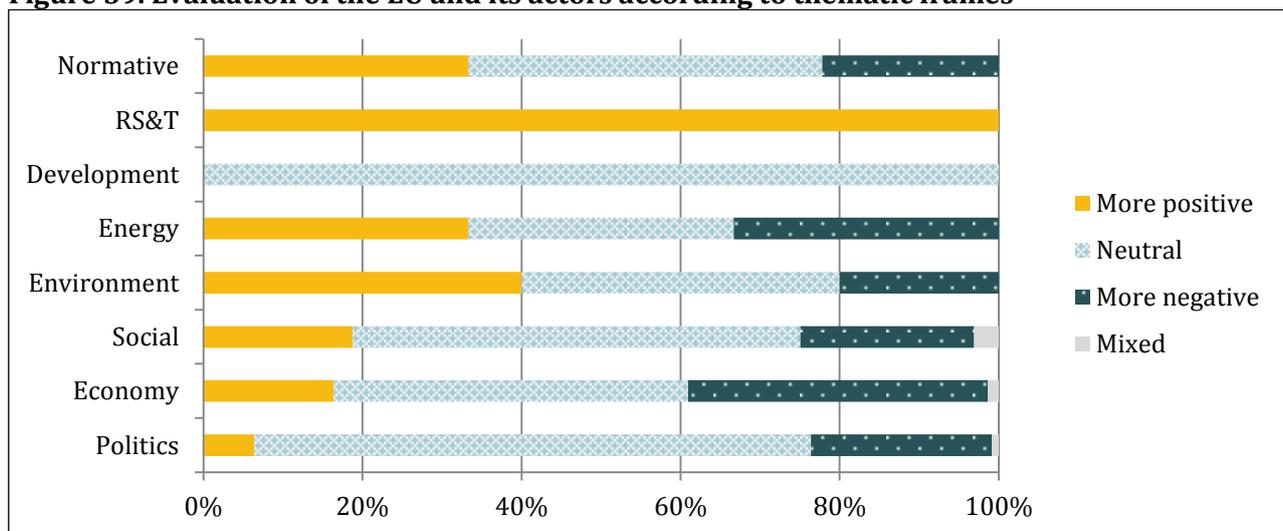
International development-related news was virtually invisible: just two EU stories were published - EU aid to victims of the Nepal earthquake and the blocking of EU aid to Gambia. Not a single development news item was reported under the Europe classification. This utter disregard for the EU's and Members States' global aid role may be explained by India's own transition to a donor from an aid recipient. There is no longer any EU bilateral development cooperation with India and nor would it seem any media prioritisation of this topic.

Public opinion findings on this topic are, to put it mildly, both counter-intuitive and puzzling. In answer to a question about support to developing countries, Indian respondents view the EU once again as less important than India, the USA or Japan. However, more respondents agreed that the EU played a more important role in this area than the World Bank or the UN (despite its Millennium Development Goals agenda) and also saw the EU as playing a more important development role compared to China, Brazil and Russia.

Migration, multiculturalism and human rights

The issue of **migration** was the most common theme found in the *media's* EU dataset stories with a social perspective. Such reporting was particularly dominant in *The Hindu* with two-thirds of all reports in this frame concerning immigration. Apart from the focus on migration, no other trend or cluster of articles were apparent with stories ranging from social legislation and education, diversity/ multiculturalism, demography and crime. The reporting on migration included news about migrant deaths, protection and evacuation of migrant workers and sound migration policies. Coverage of EU actions in this issue-area attracted a negative tone (Figure 59).

Figure 59. Evaluation of the EU and its actors according to thematic frames



The media's reporting of Europe was more diverse: Europe's social sub-frames showed that diversity/ multiculturalism was the leading frame for *The Times of India* (21.1 per cent) followed by health care (17.5 per cent), history (14.0 per cent) and lifestyle (12.3 per cent). However, it was history that led in *The Hindu* (27.3 per cent) and *The Economic Times* (25 per cent) followed by lifestyle (18.2 per cent) in *The Hindu* and lifestyle (20 per cent) and multiculturalism (20 per cent) respectively in *The Economic Times*. The concentration of news under the history frame reflected the commemoration of the World Wars. The emphasis on lifestyle was expected as Europe is a favoured destination for vacations for middle-class Indians.

The *public opinion* survey contained several questions on specific human rights issues. Indian respondents viewed the EU's performance in promoting and defending human rights worldwide very similarly to how it fared in social development, with the main rivals in these areas being India, the USA and Japan. The EU was seen as performing better than the UN, Russia, Brazil or China. However, in India how the EU has dealt with refugees (and displaced people) was seen as less positive when compared with the overall fairly positive evaluation of the EU's performance in other human rights issues. This was an area that clearly stood out as the one that respondents least often evaluated positively. In addition, the EU's record on the integration migrants and refugees, as well as the protection of minors, was also least positively viewed among other areas of social development.

Some of the less traditional *stakeholders* interviewed painted a somewhat less benign portrait of the EU's actorness in these areas. In an unfavourable comparison with the UN approach to child labour issues, the EU was regarded as having 'a very dictatorial tone' and a tendency for 'just criticising India for what they are doing' rather than as the UN does, 'working at the grassroots level and helping in eliminating these things' (NGO, Commonwealth Human Rights Initiative). Even more strident criticism came from a political activist youth: 'they are influencing too much. There is also hypocrisy there because they are not concerned about human rights. They are more concerned about using human rights as a stick to tell the Third World that, 'ok you are violating the rights' and many of these policies of human rights resonate the kind of colonial policy they took some 300-400 years back.'

Environment and energy

In findings that have been consistent with previous studies both in India and in Asia more widely, *media* reporting of the EU in terms of its **environmental actions** was marginal at best. Just a total of 10 environment-related internal EU news items were reported (*The Times of India* and *The Economic Times* four articles each). The topics covered European Climate Diplomacy Day, commitment to reduce emissions, reduction of nitrous oxide levels and the volume of water to be used in toilets! There were just four environment-related external EU news reports covering the topics of air purifiers, climate action as well as climate negotiations in Paris. A similar level disinterest in environmental stories was evident in the Europe dataset: a total of 11 news items were reported, eight of which focused the topic of EU environmental action from an internal perspective. Thus, despite Europe being considered a leader in environmental protection it went virtually unreported. When it was discussed the topics included renewable energy, radiation over Northern Europe from the Chernobyl disaster and air pollution.

A similar profile for media reporting of EU in relation to energy was discovered reflecting a limited interest in European energy issues in the Indian media: just four energy stories were found in the EU dataset and seven in the Europe dataset. The topics covered from both the EU and Europe perspective were limited to sustainability, security of supply and competitiveness. More specifically, the issues discussed were the weakened demand for oil imports, the approval of BP to retail jet fuel, on-going European efforts to increase the share of renewable fuels, the potential for a Central Asia-Europe energy pipeline and smart energy storage and partnership between solar companies.

This absence of informed media commentary on European environmental and energy issues, may in part explain the Indian *public's* muted perception of the EU's global environmental role and effect. The EU's role in fighting global climate change and protecting the environment was seen in a similar light as its contribution towards maintaining global peace and stability. The EU was ranked below India, the USA, Japan and Russia. There was a small crumb of consolation as the public opinion respondents from India felt that the EU performs somewhat better in this field than the UN or other countries used for comparison. But importantly, in Indian public perceptions, protection of the environment and the fight against climate change is not among the fields in which the EU is seen as standing out the most.

The selected *elites* were more attuned to the EU's environmental role and a key theme discussed was the great potential for further engagement: themes raised were nuclear safety, climate change, EU smart cities and renewable energy initiatives.

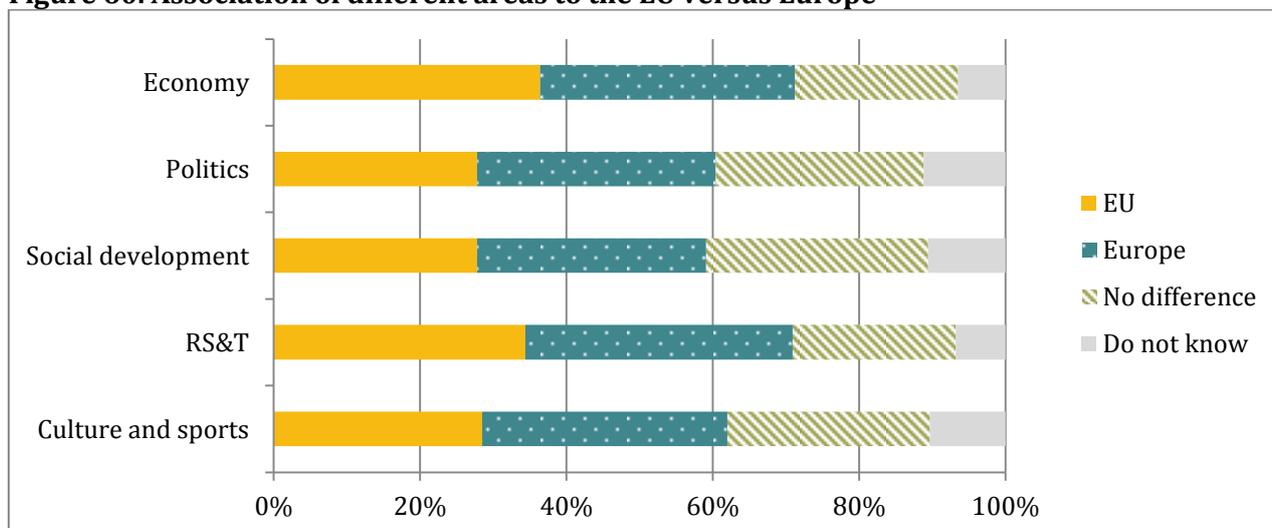
Research, science and technology

Counter-intuitively, given the EU's commitment to science and research, just a single research, science and technology EU news item was published – although at least this was on the subject of EU research funding and Horizon 2020. It seems that when dealing with these topics, the *media* in India prefer to adopt a broader 'Europe' frame of reference: a total of 24 news items were reported as part of research, science and technology frame (lead by *The Times of India* which published 14 of these) with the majority (14 stories) focused on research, six on science topics and just four concerning technology. This media disregard is surprising in the light of the numerous RS&T collaborations between India and Europe. As one academic interviewee commented: 'I would say they are active in science and technology quite a lot, which is still not that much visible... They are active in education field; they are active in some of the health projects.' (think tank, Chair). Science and RS&T topics that had at least some visibility at the elite level were FP7, Galileo and ITER.

Perhaps then it is less surprising that Indian *public opinion* does not put European scientific expertise on a pedestal. In the field of innovation and technologies Indian respondents ranked the EU as lagging behind India, the USA and Japan and viewed the EU's importance in innovation and technological progress similarly to that of Russia. Despite this constrained overall view of EU's global importance, respondents felt that the EU performed very well in the development of new technologies in general as well as in various specific fields of technology and research.

In contrast to the majority of cases in our sample, respondents in India did not show clear patterns of differentiation between Europe and the EU in terms of politics, culture, sports and other areas. For example, 32.60 per cent of respondents associated the area of politics with the term 'Europe', whereas only 27.80 per cent did so with the 'EU' (Figure 60).

Figure 60. Association of different areas to the EU versus Europe



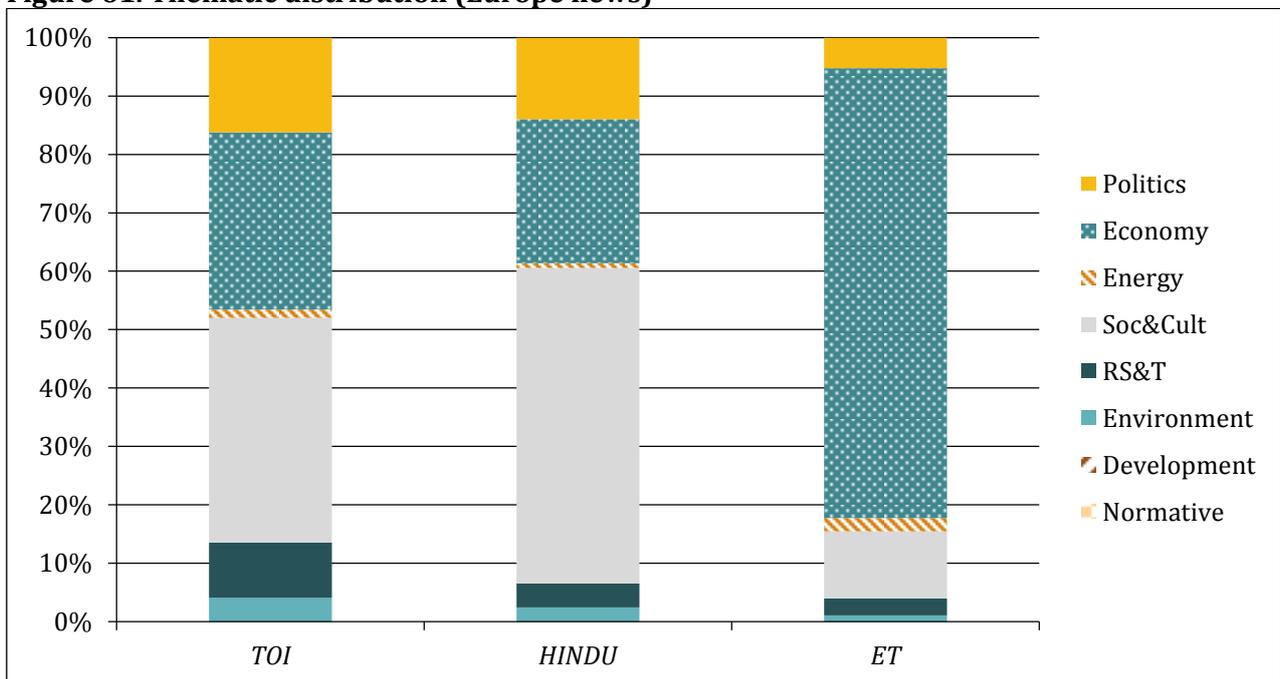
Note: Based on the answers to Q23: Some people think about Europe, whereas others think about the European Union when talking about economy, politics, culture, sports and other areas. In your case, which term

- Europe or the European Union - comes to your mind first when you think about the following subjects? (N = 1056)

Culture

In contrast to the news story profiling found in the EU news dataset – where around three-quarters of all news concerned either political or economic issues - news preferences in the Europe dataset placed social and cultural affairs as well as economy as the leading *media* frames in all three outlets (see Figure 61). Articles under the social and cultural affairs frame accounted for 38.5 per cent of all Europe stories in *The Times of India*. In *The Hindu* the pattern was even more pronounced (51.9 per cent). As could be expected, *The Economic Times* reflected a different pattern - the leading frame was economy (77 per cent) but then followed by social and cultural affairs ahead of politics.

Figure 61. Thematic distribution (Europe news)



In India's *public opinion* when compared to other countries EU Member States are seen as attractive for their culture and lifestyle. However, in a familiar pattern, in this respect EU Member States lagged behind India, the USA and Japan. Even though respondents evaluated all areas related to European culture very positively, they were more likely to choose music, luxury goods and clothes, sports, lifestyle, modern architecture and design over food and cuisine, theatre and cinema, arts, monuments and museums or history. However, Indian respondents surveyed tended to agree with a statement that Europe is a producer of luxury goods and clothes or music and arts and popular in India.

Elite commentary was similarly positive and informed at the Member State level with culture regarded as '[O]ne of the easier ways to move towards United Kingdom because of historic links and the fact that English is something common to us' (Business, Senior analyst). There was evidence that certain stakeholders were also well-informed about cultural programmes: '[e]arlier the programme was called ECCP (EU-India Economic and Cross Cultural Programme) ... (and) used to support partnerships of joint projects between organisations

from the EU and India.... to do joint research or joint projects and this was funded by the EU under the ECCP' (Media, Senior Expert)

Education

Although EU or European media news items concerning education rarely surfaced, and the general public was often unaware of programmes such as Erasmus, the survey confirmed an interest in educational initiatives and that the Indian public were impressed by the level of education of Europe's population, an area of social development where the EU is seen as performing best. Consequently, the EU was also seen as an important partner for India's educational exchanges.

In contrast, there was a higher level of awareness of EU and Member State educational programmes found in the *elite* interviews: 'definitely the Erasmus Mundus programme ... That's a really good programme' (NGO, Advocacy coordinator). Other initiatives mentioned were Sarva Shiksha Abhiyan ('Education for All'); the DAAD scholarship programme of Germany; and GIZ (Deutsche Gesellschaft für Internationale Zusammenarbeit). Most of the elites talked about having regular interaction with ambassadors and attending conferences and cultural programmes, thus explaining perhaps their greater awareness of these educational opportunities.

The EU as a norm-setter

The notion of **Normative Power Europe** did not especially appeal to India's *media*. A mere nine EU news items were reported under the normative frame – covering peace, liberty and human rights. An additional six articles drawn from social cultural affairs news: human rights (3 news items), liberty, rule of law and anti-discrimination (all a single story each). This disinterest was even more explicit in the Europe news dataset where the normative frame was not visible. Therefore, Europe seems to have been dealt with largely devoid of analysis with no attempt to add depth. Given that most of the time Europe was mentioned in passing, the story cannot develop to a stage where any normative power of Europe becomes apparent.

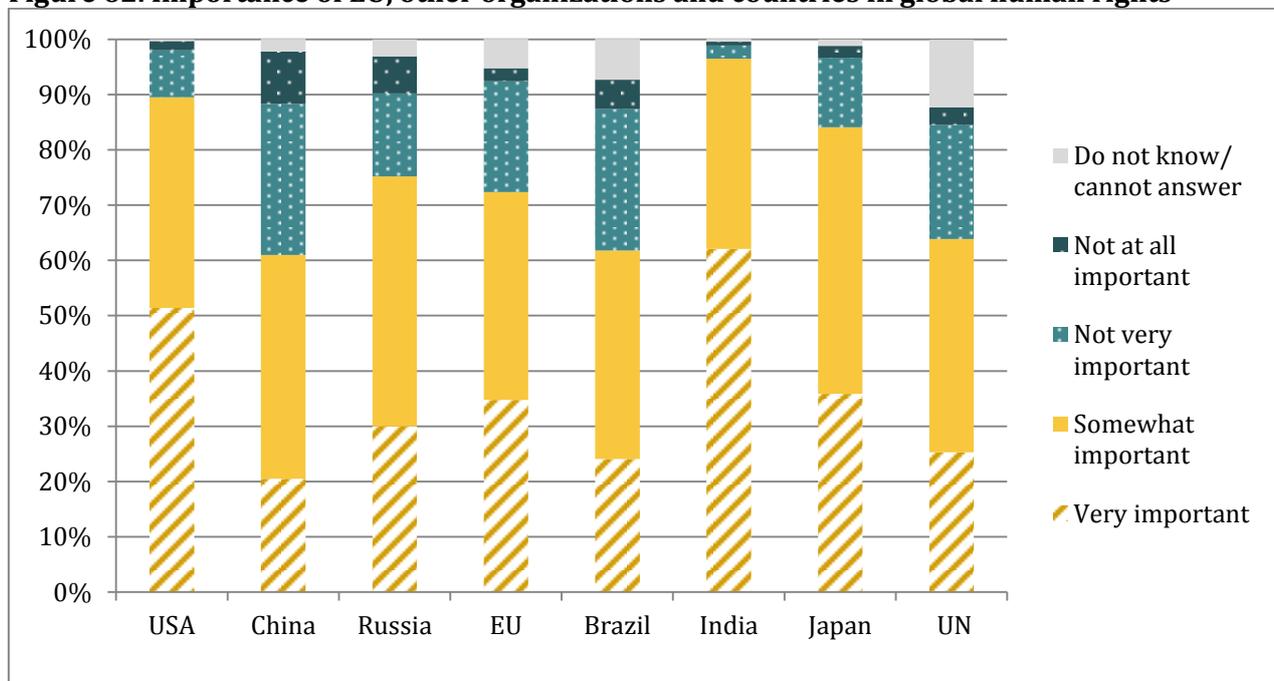
Conversely, and perhaps more reassuringly and important for Public Diplomacy, some of the interviewed elites were quite comfortable with the idea of the EU's normative power. One academic perspective argued 'Their objective is basically to strengthen institutions of democracy, women empowerment and promoting regional cooperation in this whole region and strengthening institutions of governance as well as promoting private sector development' (think tank, Chair). In a similar vein it was asserted that 'It is more of a soft power where they use more of economic aid and dialogue as the main means which they interact with countries' (NGO, Commonwealth Human Rights Initiative). However, the efficacy of this normative influence was also questioned, with the same individual explicitly pointing to the internal divisions within the EU's normative agenda: 'what we see is Germany, France, and UK in some extent pulling the strings rather than EU as an identity working... we all can see that how divided they are on dealing with the illegal immigration.'

Some elites saw a synergy between the EU and India in the normative discourse: 'I think the EU emphasis on democracy, on diversity, on justice, on ecology all these do resonate with what India should be doing. So I think they do converge.' (media, Editor); 'By and large, as I

said we share the same values and democracy and human rights and free press, etc. markets so on and so forth. By and large we are on the same plate.’ (Policymaker, Ambassador).

In terms of *public opinion*, respondents saw India itself, as well as the US and Japan as the most important actors in the field of promoting and defending human rights worldwide. The role of the EU was seen as relatively similar to that of Russia (Figure 62).

Figure 62. Importance of EU, other organizations and countries in global human rights



Note: Based on the answers to survey Q10: In your view, how important a role do each of the following countries or organisations play in in promoting and defending human rights worldwide to protect human dignity, freedom, equality and solidarity? (N = 1056)

3.4.4 Local conditions: explaining the perception of the EU in India

Perceptions are a result of interactions between internal (India-specific) and external (EU-specific and global) factors. There are several possible explanations for the profile of EU images and perceptions in India.

There exists a seeming paradox underlying EU-India relations, as evidenced by this 2015 data as well as previous studies into EU perceptions in India. First, history in relation to colonialism remains contested: one the one hand, ‘[H]ow could it be positive? You tell me. Your question is wrong. How could it be positive?’ And as in the words of Gandhi: ‘you don’t hate the British, you hate colonialism, not the colonizer.’ But on the other hand interviewees suggested that such a colonial heritage perception is no longer strong. The current discourse has transcended that perception. It is only a factor when EU is perceived only as the UK or France. On balance, it seems that attitudes towards the EU/ Europe are coloured, no matter how historically inaccurately, by national histories even if the colonial legacy no longer plays a direct role in the relationship. Future studies of EU perceptions in India could look into various discourses through which the images of colonialism are shaped (e.g. school and university textbooks, iconic films and fiction books that are a part of national secondary school curriculum, etc.) and assess images of Europe and its actors in them.

Second, it seems clear that India is more aware of the cultures of individual EU Member States rather than of any 'European' culture. That dichotomy does not help EU-India relations. This is bolstered at the political level too: the idea of the EU as a political entity is not clearly understood. The informal federal structure of EU and of India could be better leveraged here to help in bringing the two entities closer. Indeed, the similar linguistic challenges underpinning the cultural diversity that both face was noted in one interview: the EU has 23 official languages and India has 22 official languages and hence 'India itself is a mini Europe.' Language was also raised in a different context: interest within Indian society towards Europe is clearly connected to language accessibility – those who speak English or at least one or two European languages. More information, both news as well as official material, in local native languages would assist greatly. Future studies of EU perceptions in India could assess India's self-images, including its self-visions of a multicultural society, and use them to offset local images of the EU in this issue-area. Such a study could be of great potential for EU Public Diplomacy, as the EU affected by the migration/ multiculturalism crisis could initiate a series of meaningful dialogues with India, listening to India's success stories in this area and anchoring EU messages in location-familiar discourses.

Third, to enhance relations regular dialogues should be held to help raise awareness in India about 'progressive issues' such as gender justice, climate change, and peace in South Asia. It was advocated that the EU undertake 'direct initiatives' in these areas as they would help in improving EU perceptions in India. Similarly, energy was regarded as an area for potentially more effective contact. Were India to get renewable energy technology from EU and multi-billion dollar investments, it would have a significant impact on EU-India perceptions. Clearly economic needs will shape relations in future. To end on a positive note, education (training, awards, and scholarships) was highlighted as an enduring factor in the relationship. Future research of EU perceptions in India could prioritise insights into EU perceptions in the issue-areas of energy, climate change, gender-justice, peace and education among diverse sectors of Indian society and across different geographies inside the country. Such a research focus could help in formulation of a more nuanced Public Diplomacy region-specific outreach targeting various cohorts – the areas where the Indian public and stakeholders would see the EU as a good example and a valuable reference, as this research demonstrates.

3.4.5 Recommendations for EU Public Diplomacy

What are the other foundations upon which the EU's Public Diplomacy can build on? First, the EU is not confronted by a hostile environment in India, although EU officials and others may feel that the EU's place in India's priorities is lower than deserved. As the general public survey demonstrated, the EU was generally viewed positively (although less so than the USA and Japan) and rarely perceived negatively (particularly in comparison with attitudes towards China). The EU was most commonly described as modern, strong, efficient and peaceful; and least often described as hypocritical, arrogant or aggressive. This is in line with the positive general view of the EU as well as the positive assessment of India's relationship with the EU. Respondents with mostly positive attitudes towards the EU account for approximately two-thirds of the population sample. Less than five per cent expressed negative (usually arrogant) or no attitude towards the EU. Contextualising these findings comparatively, Indian public opinion viewed the EU as less modern than the US, Japan or India; and both the EU and India were most often described as peaceful and united (although

the EU was lagging behind India in this respect). More encouragingly, the EU was least often described as hypocritical, arrogant or aggressive in general and also compared to most other countries. These positive images among the general public undoubtedly present an opportunity for EU Public Diplomacy to reach wider groups within Indian society.

While there is a relatively benign and positive perception towards EU and EU Member States, at a visionary level more needs to be done to take the relationship forward. There is an absence of innovative ways of raising the profile of the EU. Indians understand EU Member States better than the EU. People are aware of the EU as a holiday destination but not as a political entity. Simply, EU Public Diplomacy in India needs to be spruced up.

Second, awareness and knowledge were key impediments highlighted in the research. The general mood was 'if people are not aware of EU, so how will they know about the programmes.' An extreme view suggested that there is an 'absolute lack of knowledge and engagement' with the EU and its policies. If true, given such an abysmally low level of awareness the formulation of an opinion or perception often does not take place. Consequently, not being able to spread awareness about EU policies was considered a 'major weakness of the European Union in India. They have not been able to project themselves as an entity.' Differentiation between different target audiences within Public Diplomacy needs to be kept in mind, however: a consistent view expressed was that 'the man on the street would not know about the EU' while the business community, academia and 'educated people' would be most aware.

Third, the supranational-intergovernmental tension inherent within European integration was also manifest in EU-India relations. There is a high degree of coherence on the EU side with regard to India but lack of coherence with regard to role of EU Member States. There is a lack of understanding of what the EU wants to achieve: some policies may align with that of some EU Member States while they may not conform to that of others. More encouragingly, it was argued that the EU should invest more in raising awareness about itself to counter the traditional state-centric view of international politics: it was recognised that non-state entities like the EU matter because they set norms and therefore the role of EU should be better conveyed to the people of India.

Fourth, Indian experts considered that India could learn a great deal from EU discourses on climate change and gender justice arguing that the EU is very effective when it comes to shaping norms and discourses and dialogues. 'EU emphasis on democracy, on diversity, on justice, on ecology all these do resonate with what India should be doing.' However, a word of warning was also raised. Major stakeholders in India and the educated middle classes perceive EU 'to be very democratic, very liberal, very free and other reasons not so free.' This has to do with 'growing Islamophobia also and also the legacy of colonialism, we are less interested in exploring the region of Asia and other regions.'

Other evidence-based ideas that merged from the research underlined that the EU needs to become more visible in all possible areas of engagement with India. Specifically, the EU has the mandate to negotiate with India on trade issues and it should take the lead and not EU Member States. The political dialogue between the two sides should be revived and sustained as a priority basis. An immigration policy in favour of increased mobility would help both sides. Low hanging fruit such as enhanced cultural and educational exchanges

were seen as obvious avenues to change perceptions and a focus on humanities necessary to lead to closer EU-India relations. Lastly, an urgent need was noted to streamline and reduce the large number of joint working groups formed under the ambit of the EU-India Joint Action Plans so that concrete results can be achieved.

What, then, are the perceived impediments to better EU Public Diplomacy in India? The EU is accused of too much nit-picking and moving the goal posts further and further. While there is cooperation regarding soft power issues, when it comes to hard-core security issues, EU-India cooperation is very vague. The EU is visible when it comes to peace dialogues and regional dialogues but not very visible when India-Pakistan relations are discussed. Unfavourable comparisons were made with Norway's distinct contribution towards conflict resolution in Sri Lanka. One interviewee warned if EU does not better engage in technology transfer to India, China, Korea, Taiwan and Japan will go ahead and forge mutually beneficial partnerships based on technology.

A harsh reality is that the EU is not the top priority of Indian foreign policy, possibly not even taken as a 'serious' global actor. A repetitive theme articulated was that individual countries 'are projected more successfully than the EU' in India. For example, many Member State's national embassies are far larger and have far greater resources at their command compared to the EU Delegation. So the impact or footprint of the EU diplomacy is much less. And even when the EU was giving development assistance to India, Europe did not receive the visibility it deserved: by phasing out the EU's developmental role may render it 'yesterday's player'. Only the signing of the FTA would facilitate a major change in perceptions.

Data drawn from across all three research measures produced some broad conclusions on who the EU should consider targeting as local partners. Among these were the various State governments, Chambers of Commerce, NGOs, think tanks, the Indian Council for Agricultural Research, universities, and research institutions, civil society organisations, government agencies as well as newspapers. It was noted that company-to-company partnerships do well and that the EU should adopt 'a top-bottom approach' and cultivate 'a good relationship with the government at the national level.' In addition, grassroots involvement was seen as a mechanism for ensuring greater visibility. Interestingly, it was suggested that more engagement in terms of empowerment of general people with information, access to justice and access to health care should be ensured through EU-India cooperation.

Most of the elites refrained from mentioning specific institutions and talked about the broad categories of institutions to partner. An exception to this rule concerned the energy sector where the Confederation of Indian Industry, the Federation of Indian Chambers of Commerce and Industry and the Tata Energy Research Institute were singled out. When interacting with business organisations, a focus on development to facilitate entrepreneurship was advocated.

Looking at more specific sectors - multiculturalism, migrants and minorities - it was argued that the EU and India should have an open dialogue with various people's movements and umbrella organisations and networks like the National Rights for People Movements. Of course, not everyone interviewed welcomed the EU's role: 'first do justice in your own region; then think about justice outside.'

Recommendations for EU Public Diplomacy from practitioners on the ground in India

From the perspective of practitioners at the EU Delegation on the ground there are three areas where EU Public Diplomacy should concentrate its efforts. Internally, a greater emphasis on seminars and trainings for Delegation staff to improve cooperation and skills were identified as ways to make more effective use of scarce capacities. In relation to the press, in order to overcome Indian media reluctance to cover EU issues, Delegation activities and news have to clearly show a profound 'India angle': high level visits from Brussels to India are crucial to shape a powerful and relevant image of the EU. The media evidence presented in this research serves to underline the importance of such local 'hooks' and the importance attached to visits. Education remains a key Public Diplomacy vehicle: here signing a formal agreement with potential partners was identified as necessary to assure mutual commitment to the project.

3.5 Japan

This country chapter presents a synthesis of the Japan-specific findings of media and social media analysis; elite interviews and public opinion poll that were all conducted in the framework of this study. The chapter follows the logic of the research design with the main findings structured according to the common research criteria – namely visibility; actorness and local resonance; and norm-setter. For actorness and local resonance, these are discussed in keeping with the themes analysed in this research: economy and trade; politics and security; normative and human rights; development; migration, multiculturalism and human rights; environment and energy; RS&T; culture; and education. The local conditions that help to explain the perception of the EU in Japan are presented and the chapter concludes with recommendations for Public Diplomacy, including a subsection on recommendations in the eyes of practitioners based at the EU Delegation in Tokyo.

3.5.1 Sample

Public Opinion

The online omnibus survey was coordinated and analysed by the Public Policy and Management Institute (PPMI) and conducted by TNS Global. The respondents in Japan were surveyed in Japanese. Data collection took place in August 2015. The online omnibus survey was designed to be nationally representative with regards to age, gender and region. The survey covered a total sample of 1024 individuals within the 16-64 age group.

Media

The media content analysis was designed, supervised and coordinated by the National Centre for Research on Europe (NCRE), University of Canterbury, New Zealand, and conducted by local researchers trained by the NCRE. Two popular prestigious papers *Yomiuri Shimbun* and *Asahi Shimbun* and the business newspaper *Nikkei* were monitored daily between April 1 – June 30 2015 using e-search engine Press Display to ensure high accuracy in data collection. Two separate datasets were collected over the period of observation – ‘EU’ (750 articles) and ‘Europe’ (1,216 articles). Key search terms for dataset ‘EU’ included (with acronyms) ‘The European Union’, ‘The European Commission’, ‘European Parliament’, ‘European Court of Justice’, ‘European Central Bank’, ‘European Presidency’, ‘Council of the European Union’, ‘Eurozone’. The key search terms for dataset ‘Europe’ were ‘Europe’ and ‘European’.

Elite opinion

The NFG coordinated the interview programme and designed the questionnaires in close coordination with the Country Experts and the project partners. The NFG was also responsible for the training of the Country Experts and supervision of the implementation of the interviews. The interviews itself were conducted by the Country Experts. Interviews have been conducted as a source to identify upcoming trends and to cross-check findings. They are non-representative due to their current scope and should be considered as a tool for future evaluations in a representative volume. The NFG chose a three-phased approach: in Phase I, two transcripts were due until June 6; in Phase II, five interviews were due until July 15; and in Phase III, five interviews were due until August 17. The NFG was in charge for the coding of the transcripts and the provision of the results to the project partners.

Interviews in Japan were conducted in Japanese or English and translated and transcribed by the Country Experts. They interviewed 11 experts (Business (2), Academia/ Think Tank (2), Policy-makers (2), Media (2), Civil Society/ NGO (3)) and held one group interview with students (five BA students from the University of Tsukuba).

Semi-structured, anonymous qualitative interviews under Chatham House Rules were conducted with all EU Delegations across the 10 Strategic Partner countries, primarily in the form of a group interview. The groups included Heads/ Deputy Heads of Delegations, Heads of Press and Information Section and/ or Heads of Political Affairs Section. Interviews lasted between 60 to 90 minutes. In Japan, four diplomats were interviewed.

NB: two robust datasets collected in the course of public opinion survey and media monitoring allow for quantitative and qualitative analysis of data (for more detailed information, please see attached country-specific media and public opinion reports). Survey of elite opinion is impressionistic due to small numbers of the interviews. Data collected is analysed using qualitative approach.

3.5.2 Visibility

Before looking into some more detailed aspects of the level of the EU's and Europe's visibility in Japan, what were the most striking *media* highlights?

Concentrating first on the EU dataset, the *Nikkei* carried a much larger number of EU articles than *Yomiuri* or *Asahi*. While the EU articles tend to be long, typically the EU was treated only as a minor subject (see Figure 63 and Figure 64). Under a third of EU stories portrayed the EU as the main focus of a news story. The majority of EU articles in all newspapers treated the EU in a neutral manner and most appeared in the international section. Visual support (graphs, pictures and maps) were used in nearly half of all the articles. The articles were predominantly written by their own correspondents based in Europe. In terms of the frames, economy, politics are dominant, followed by normative. A large number of articles were found regarding the Greek crisis and the UK election; market and economic conditions; migration from Africa; and COP21. EU Member States and their political leaders appear more often in the EU articles than EU institutions or EU leaders. In terms of the domesticity of the articles, 'EU Member States' is the largest category for *Yomiuri* and *Asahi*, whereas it is 'local' for *Nikkei*. Not many metaphors were used, but when used, they tended to be used in a negative way.

Figure 63. Degree of centrality (EU news)

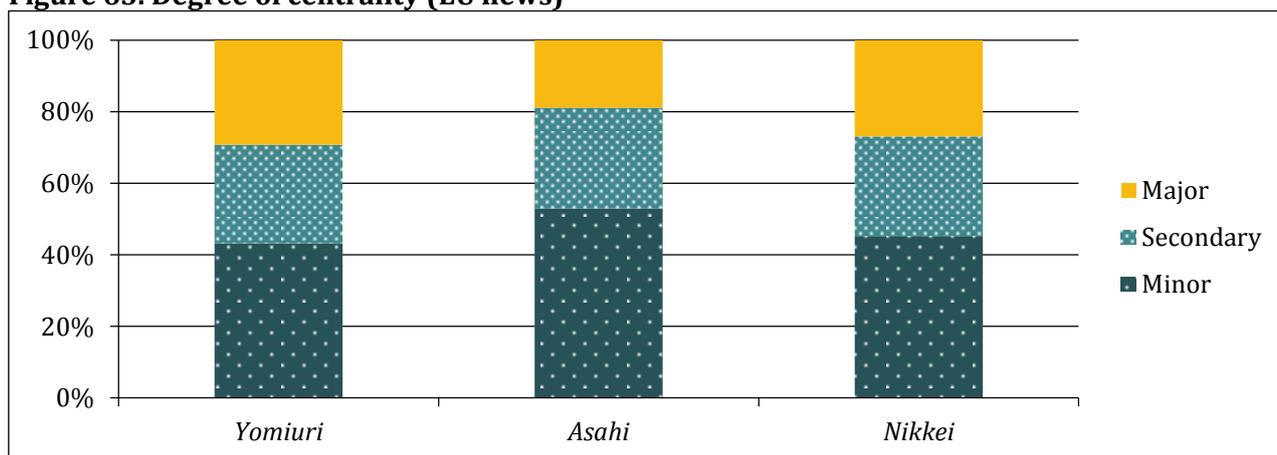
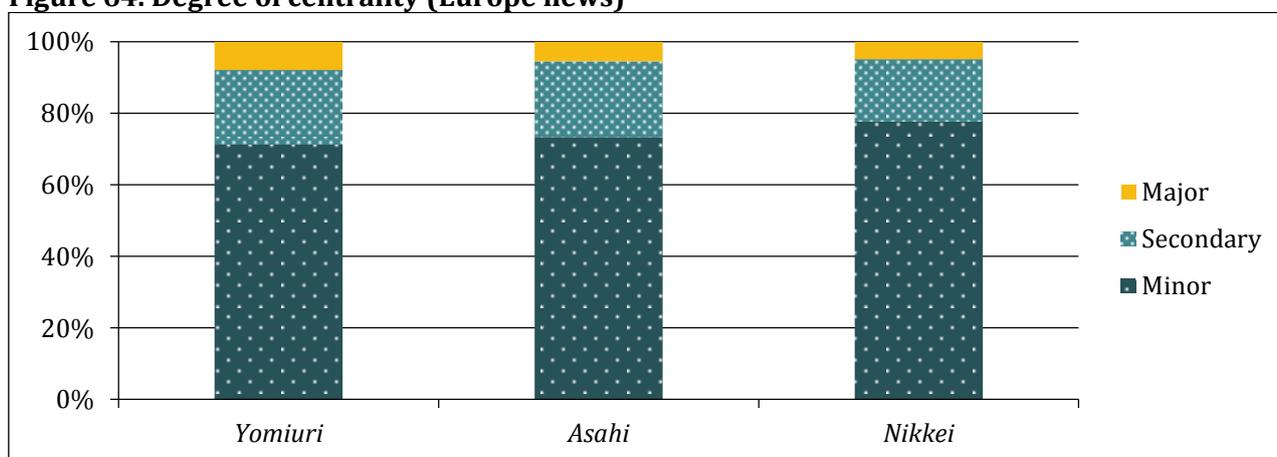


Figure 64. Degree of centrality (Europe news)



Turning to the parallel 'Europe' dataset, importantly the term 'Europe' does not normally mean the 'EU' in Japanese newspapers. Again *Nikkei* carried the largest number of Europe articles, around three times the *Yomiuri* and *Asahi*. However, the most significant feature of the Europe articles is that Europe usually appears in long articles as a minor topic, often merely mentioned in passing.

Stories concerning the economy led in *Nikkei*, while 'society & cultural affairs' and 'politics' were the most common in *Yomiuri* and *Asahi*: consequently, in contrast the typical location of EU stories, the largest number of Europe articles appeared on the economy section, followed by the international and general sections. A large majority of articles on Europe were neutral in tone (the only significant exception were articles in the normative frame where nearly 40 per cent treated Europe positively).

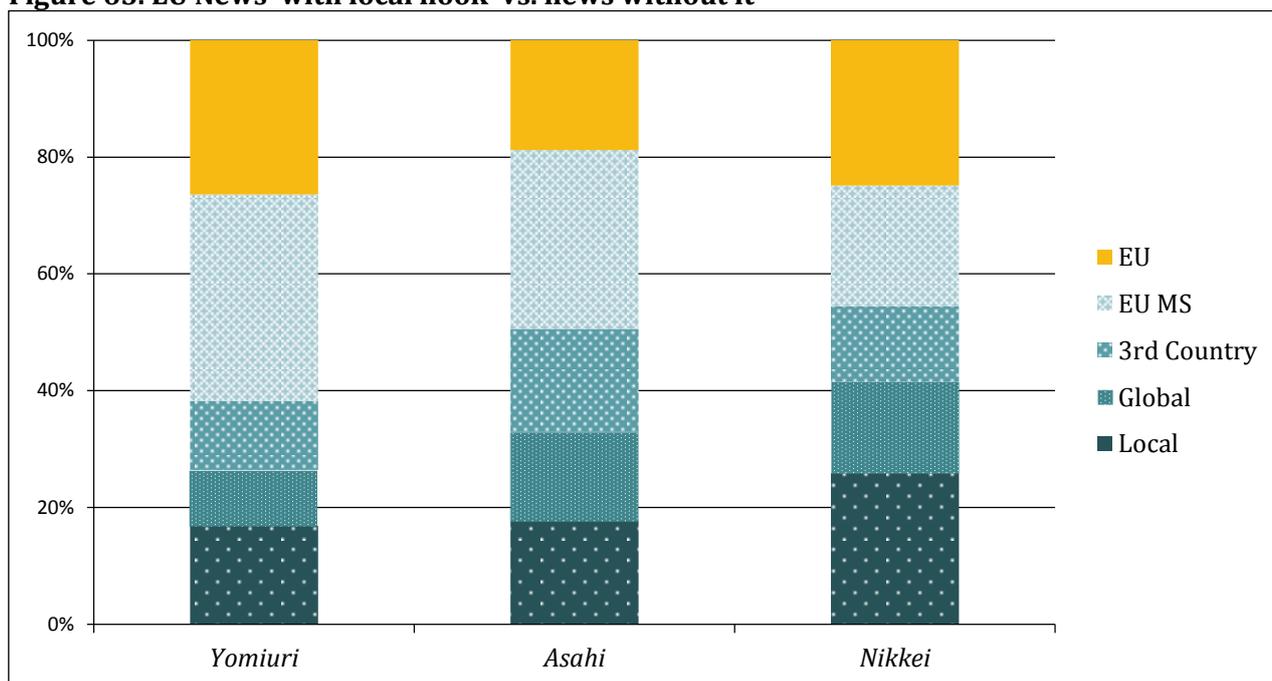
What then are the more nuanced levels of visibility underpinning these generalisations? In the 'EU' dataset the volume of EU coverage in Japan was quite substantial and in keeping with findings from previous studies. The total number of EU articles was *Yomiuri*, 178; *Asahi*, 170; the *Nikkei*, 402, an average above four articles a day. Given that international news space is always limited, the EU's visibility could be considered relatively high in overall terms. It is higher than averages in this study – volume across 10 countries is 505 for the EU dataset and 635 for Europe.

Interestingly, in all the three newspapers, long articles dominated the coverage of EU news (*Yomiuri*, 34 per cent; *Asahi*, 50 per cent; and *Nikkei*, 39 per cent); the EU was more likely to be treated as a minor subject in medium or long articles, and often treated as a major subject in short articles.

The most visible EU institutions were the ECB (158 articles), followed by the Council of the EU (105), the European Commission (67), the European Council (45), the European Parliament (10) and the European Court of Justice (5). The large number of articles mentioning EU institutions can be explained in the context of the Greek crisis, where the ECB and Eurozone finance ministers meeting were major players.

As for the EU Member States, approximately 40 per cent of articles mentioned Greece (286), followed by Germany (222), UK (135), France (129) and then Italy (73): with the exception of Slovenia, all other Member States were mentioned at least once. Despite the fact that there was a British general election, there was no substantial difference between the number of articles mentioning the UK and those mentioning France – suggesting that France is very visible in Japanese newspapers. As for EU leaders, Juncker appeared the most (49 articles), followed by Tusk (33), Dijsselbloem (31), Draghi (24) and Mogherini in just 13 articles. For national leaders, the ranking was Tsipras (104 articles), Merkel (65), Cameron (61) and Hollande (39) (Figure 65).

Figure 65. EU News ‘with local hook’ vs. news without it



Focusing now on the ‘Europe’ dataset, the volume of ‘Europe’ articles was significantly larger than those found for EU articles: *Yomiuri* published 240, *Asahi* 237 while *Nikkei* at 739 tripled that of the other two newspapers. In contrast to this sizeable volume, Europe was used in a minor way in more than 70 per cent of articles in all the three newspapers and treated as a major topic in less than 10 per cent of stories. Consequently, while the word Europe appeared quite often in Japanese newspapers, this did not mean that interest in Europe was always high: rather, many such articles mentioned Europe just in passing, almost casually without meaning anything substantial related to Europe.

All the three newspapers extensively used tables, figures, graphs and pictures, but seldom use cartoons to illustrate EU (or Europe) articles. Photos were most often used – the purpose perhaps being to show unfamiliar faces to the Japanese readers – without conveying any particular message.

When the content of the EU news stories is considered, there was a distinct dichotomy separating *Yomiuri* and *Asahi* from *Nikkei* which – unsurprisingly given the nature as a business paper – had the highest level of reporting for economic stories (although with a substantial and similar number of articles dealing with the EU from a political perspective). In contrast, *Yomiuri* and *Asahi* published almost three times as many political EU news items as ones focused on the economy.

The number of articles for the ‘internal’ and ‘external’ political sub-frames was more or less balanced in the three newspapers. In the ‘internal’ sub-frame, the Greek crisis dominated (approximately 60 per cent), followed by the UK election and UK referendum (approx. 20 per cent). As for the ‘external’ political sub-frame, there was no single dominant theme and the three papers differed significantly. In overall terms, the EU-Russia-Ukraine was the most prevalent (*Asahi* 24 per cent, *Nikkei* 14 per cent and *Yomiuri* 9 per cent). The Japan-EU reports accounted 17 per cent for *Yomiuri*, 10 per cent for *Asahi* and 15 per cent for *Nikkei*. Other major topics included the G7, Iranian nuclear problem and Japan’s security.

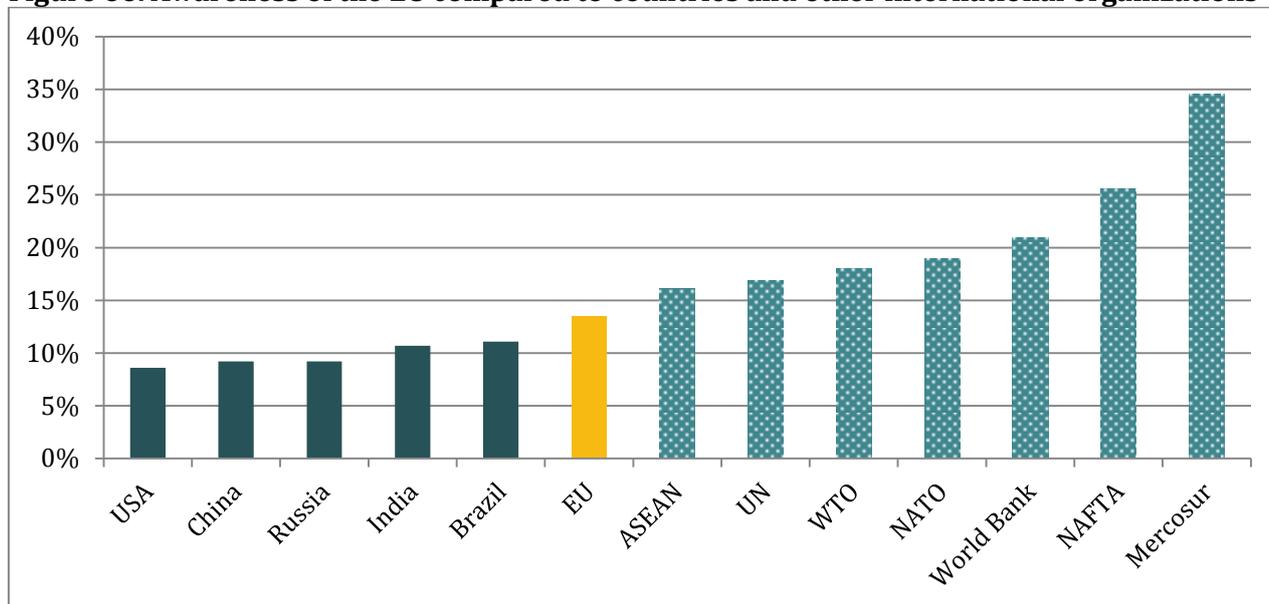
The ‘Europe’ dataset shared many of the ‘EU’ dataset’s characteristics: for example, a large majority of all Europe articles were written by their own correspondents stationed in Europe; and over 90 per cent of articles were neutral in tone. One of the more important differences was the Japanese media featured topics such as the Asia Infrastructure Investment Bank (AIIB) and China’s Silk Road plan were mainly reported as a ‘Europe’ political issue, rather than as an economic one. With this rider in mind, a common finding was that there were around four times as many Europe stories concerned with Europe’s external political role than with internal European political topics. In the ‘external’ sub-frame, the largest number of articles (71) was on the AIIB, reflecting a high level of interest in Japan on that issue, followed by the ‘issues related to Japan’ (18 articles) and then ‘Europe-Russia-Ukraine’ (17). There were 10 articles on the Chinese Silk Road Plan linking China and Europe – hence explaining why the term ‘Europe’ appears in those articles. As for the articles in the ‘internal’ sub-frame, the largest number were about the 70th anniversary of the end of World War II in Europe, followed by articles on terrorism, taxation, European integration and populism.

Did this high media interest in all things European resonate in *public opinion*? Importantly, in Japan such areas as economy and politics are first and foremost associated with the EU, whereas culture, sports and science is firstly associated with Europe. This would suggest that in Japan the EU is mostly seen as an economic and political union. Attitudes towards different Member States of the EU also help to get an insight into what makes up the perception of the EU. In Japan, Germany, France, the UK and Italy are seen as the most attractive Member States. Overall, Central and East European countries were least often mentioned as the most attractive.

The survey indicated that the overall visibility of the EU was similar albeit below that of the countries used for comparison, while it was more visible than any international organisation

(Figure 66). Compared to other countries, the EU was viewed positively (similarly and somewhat better than Brazil and India, but below Japan and the US), at the same time it was rarely seen as negative – in that respect it was only slightly behind Japan, and surpassed the US; and once again the EU was evaluated more positively than any international organisation.

Figure 66. Awareness of the EU compared to countries and other international organizations



Note: Based on the answers of option ‘Do not know/ cannot answer’ to survey Q1: Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations? (N = 1024)

Lastly, the survey respondents noted tourism as being of economic importance for Europe and confirmed that the Japanese generally see Europe as an attractive tourist destination both personally to them and for Japanese tourists in general.

A number of topics concerning the areas where the EU is more visible in Japan were unearthed in the *elite* interviews. Briefly, these covered the EU’s campaign against capital punishment; environmental policy; climate change; anti-smoking movement; branding (including French appellation); food and agriculture, language promotion; migration and refugees; Erasmus; Euro, youth policy, nuclear policy (Germany and France); and Horizon2020. Additionally, Member States were often visible in relation to cultural/ language activities, trade promotion, and specifically Germany’s Industry4.0 initiative.

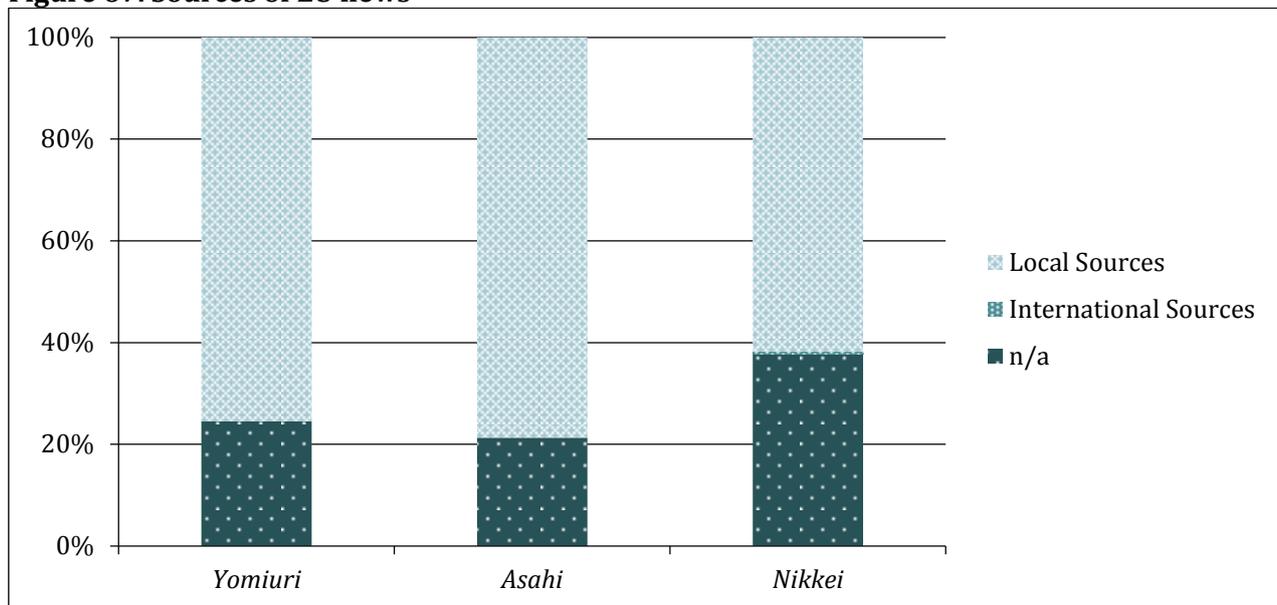
3.5.3 Actorness and local resonance

The EU as a local partner

For the focus of domesticity in the EU dataset, there was a difference between *Nikkei* on the one hand and *Yomiuri* and *Asahi* on the other. Articles focusing on EU Member States constituted the largest category for *Yomiuri* (35 per cent) and *Asahi* (31 per cent), followed by those focusing on the EU (*Yomiuri* 26 per cent and *Asahi* 19 per cent). The number of articles focusing on global was the smallest – 10 per cent and 15 per cent respectively. For *Nikkei*, articles focusing on Japan (local) accounted for 26 per cent, followed by those on the EU (25 per cent).

A large majority of EU articles in the three newspapers were written by their own correspondents stationed in Europe (see Figure 67). *Yomiuri* and *Asahi* rarely carry articles by news agencies like AP and Reuters. *Nikkei* does not carry long articles by news agencies either – it normally only carries short articles provided by news agencies. Major Japanese newspapers have a network of permanent correspondents in Europe who contribute articles on the EU (and Europe as a whole). However, for visual images, the three newspapers heavily depend on international news agencies, Reuters the most, followed by AP.

Figure 67. Sources of EU news



In all three newspapers, the vast majority of EU articles were neutral (see Figure 68 and Figure 69). Of the remainder there was a clear preference for stories to be written more from the positive or positive/ neutral perspective than with any pronounced negative tone by a ratio of almost 3:1. Japanese newspapers rarely use metaphors, reflecting the different way in which newspaper journalist write articles as well as the stylistic differences between English and Japanese. Consequently, the number of metaphors observed in the EU dataset was under 20 (and primarily found in the ‘politics’ frame).

Figure 68. Evaluation of the EU and its actors according to thematic frames

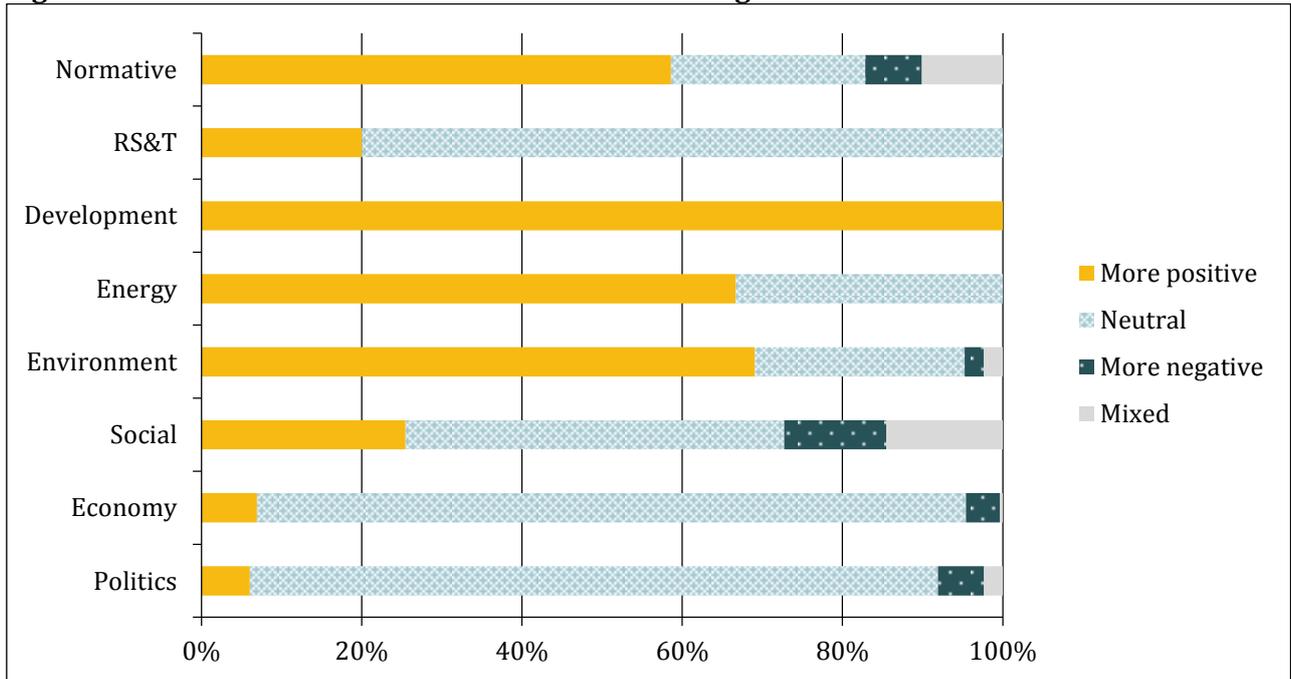
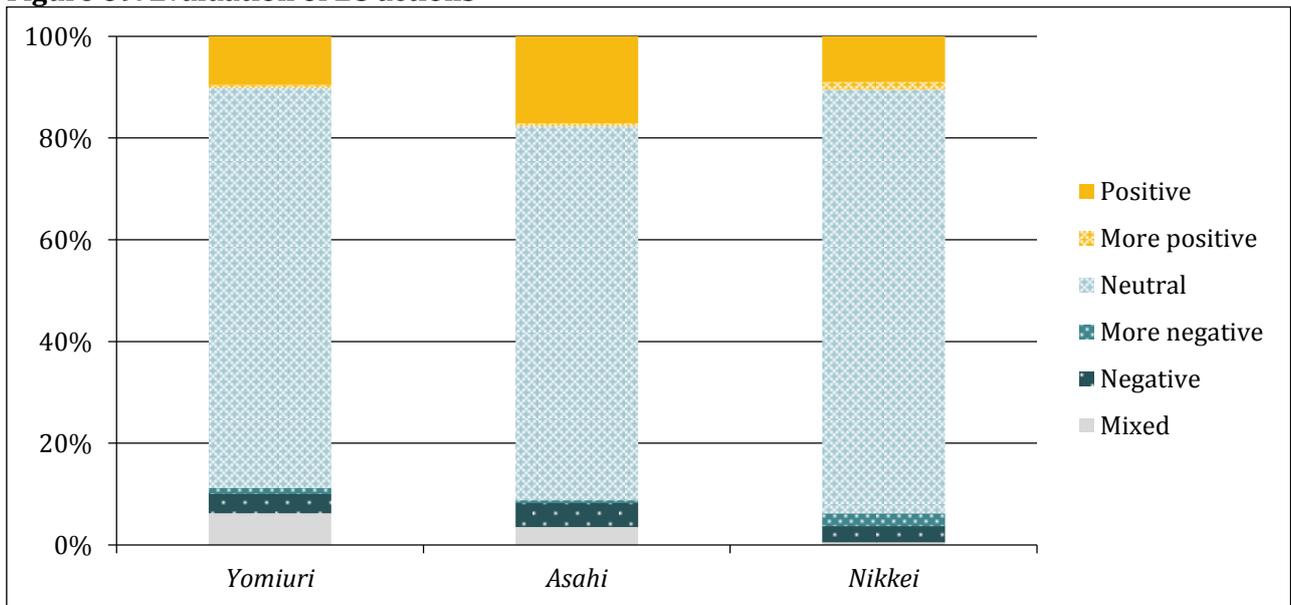


Figure 69. Evaluation of EU actions



Unlike in some other countries under study, there was no strong negative correlation in the way Japan’s *public opinion* respondents view one country or organisation in comparison to another. The EU’s relationship with Japan was perceived to be predominantly good (similar to relations with India and Brazil, but lagging behind the US).

The EU was most commonly described as *multicultural* and *modern*; and least often described as *aggressive*. This is in line with the positive general view of the EU as well as the positive assessment of Japan’s relationship with the EU. (Note, however, that the same adjectives were used by Japanese to describe other countries.) Interestingly, the EU led in the use of the adjective *united* but was significantly behind Japan in being described as *peaceful* and *trustworthy*; around 60 per cent of respondents had mostly positive attitudes towards

the EU. At the extremes only around five per cent of the population expressed either very positive or very negative attitudes.

One Ministry of Foreign Affairs official remarked that while the EU was a 'highly dependable and reliable partner... in the areas where there is some difference of views between Japan and the EU, we often feel frustration...While the EU as a whole is bigger than Japan, it still needs partners.'

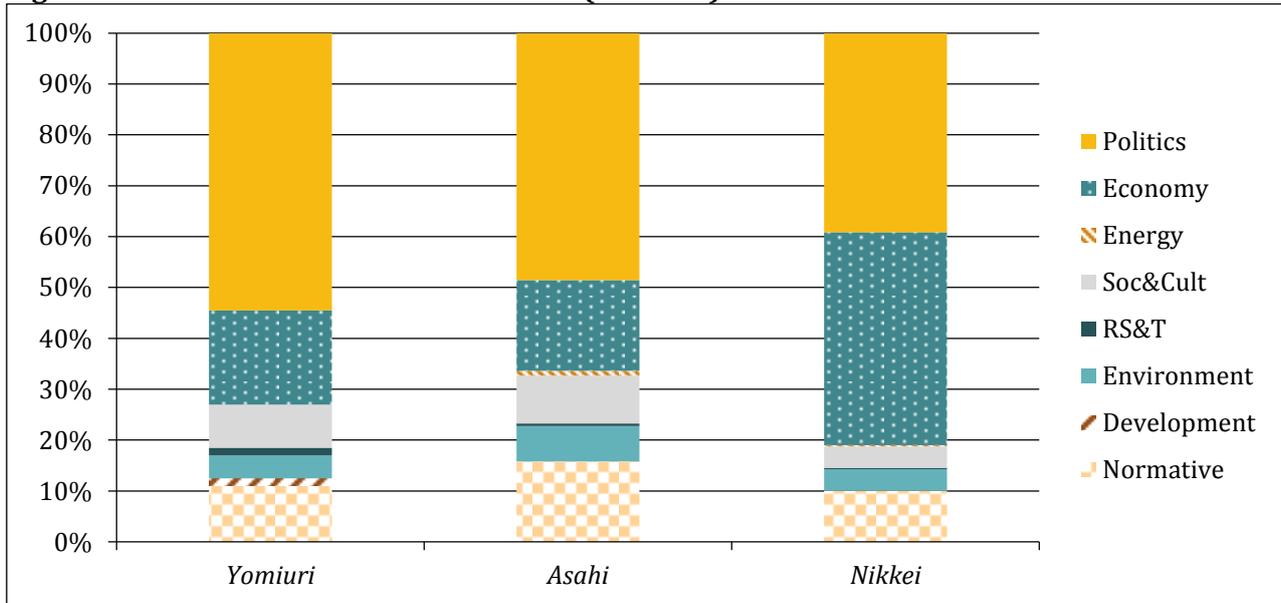
Understandably, the group of undergraduates interviewed were less informed: 'it is very hard to see what the EU is doing in Japan. So it is very difficult to judge whether the EU's activities are matching our needs and conditions.' One editorial writer confirmed 'however, Europe was still seen to be a continent of peace and happiness ... [hence] that is why people from Africa, the Middle East and other conflict zones head to Europe.' A business sector interviewee agreed that the EU was 'an international norm setter both in good and bad senses.' However, 'the EU tends to impose its own rules to others. They often believe that others should obey EU rules... but they need to understand that others might have different ideas! Simply, the EU does not seem to be able to understand that other countries have various reasons why they have different ideas and rules.'

The intergovernmental difficulties that impede the recognition of the EU as a local partner were underlined: 'my overall take is that while the EU has policies, but does not have players – meaning that those who do business are companies, not the EU bureaucracy and companies do not carry the EU label. For economic and investment issues, bilateral embassies in Tokyo are generally more active than the EU Delegation because they have their companies to promote in Japan, while the EU Delegation is not supposed to sell specific companies... Commercial attaches at some of the bilateral embassies are extremely active and visible, which cannot be matched by EU Delegation officials' (Academia/ Business/ Civil society, Exchange coordinator).

Economy and trade

Turning to the media's reporting of EU economic news, as a business daily coverage by *Nikkei* was substantially more than the other two popular dailies (Figure 70). In all newspapers 'the state of economy' stories came first, followed by 'business and finance'. In *Yomiuri* and *Asahi*, trade was in third place, while in *Nikkei* it was 'industry'. This pattern was also reflected in the 'Europe' dataset: *Nikkei* overwhelmingly provided the highest number of European economy articles (481), followed by the 'social & cultural affairs' (109) and then 'politics' (104) reflecting different target audiences of the newspapers. For all three newspapers, the 'industry' and 'business and finance' topics produced the largest numbers of articles. *Yomiuri* and *Nikkei* also carried a large number of articles in the 'transport/ infrastructure' (largely on the car and airline industries). A modest number of articles on the Tokyo Stock Exchange, in relation to the Greek crisis, were also evident. Stories were often about individual companies because many companies release consolidated financial reports in May. The large number of articles on the airline industry can be explained by the fact that Skymark Airline, Japan's third largest airline company, went bankrupt in this period and one of the reputed triggers was the company's aircraft cancellation problem with Airbus.

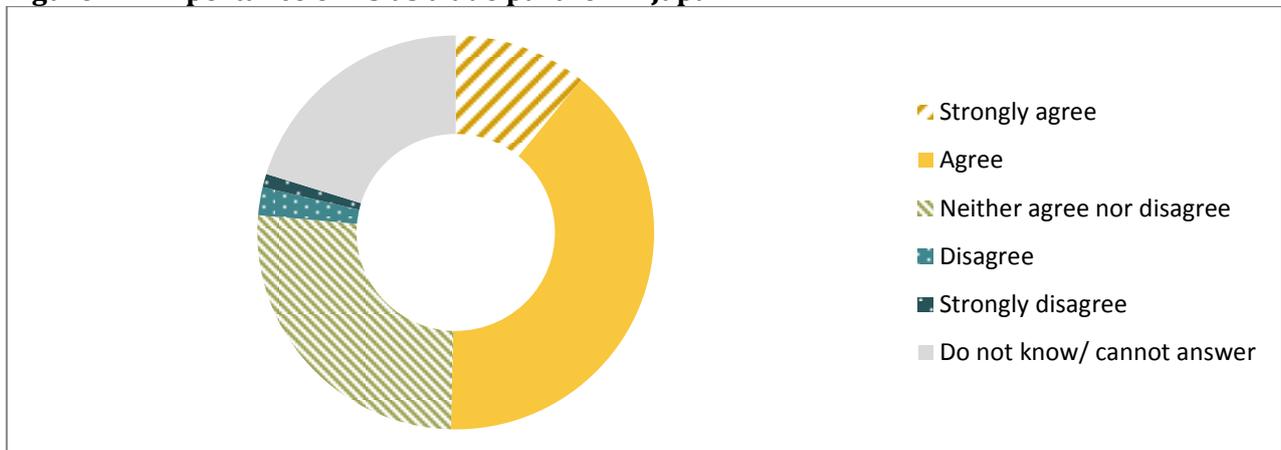
Figure 70. Distribution of thematic frames (EU news)



The media’s awareness of the EU’s economic might was also apparent in the interviews. ‘Regarding economy, the EU has a huge accumulation of experience and expertise in making rules and regulations among themselves. But, because of that, the EU tends to demand others to adopt EU rules and regulations. Brussels’ positions in FTA negotiations with other countries illustrate this tendency. But in overall terms, the EU seems to be coherent and effective in economy – particularly in international trade talks’ (Media, Editorial writer).

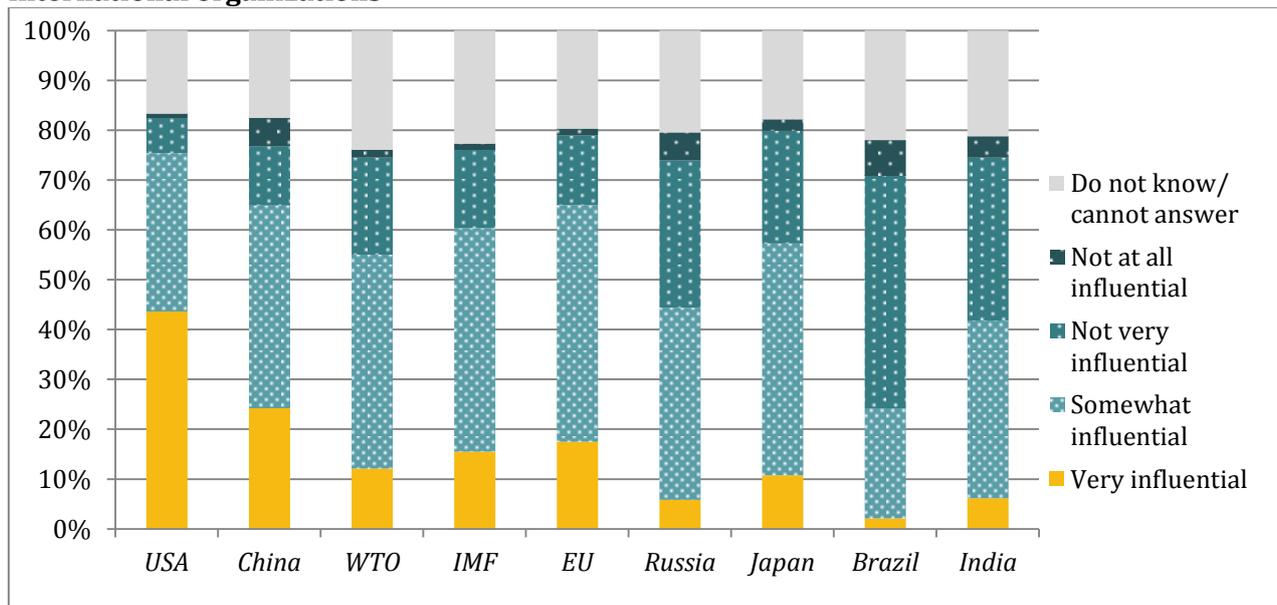
For the Japanese *public* the Euro was the most visible EU symbol and the ECB the most known institution suggesting that the EU was mostly associated with the economy. The EU’s performance in global trade was seen as fairly good, a perception supported by the finding that a high share of respondents agreed that the EU was an important trade partner for Japan (see Figure 71). The EU was among the global players Japan respondents saw as the most economically influential (Figure 72). However in this respect it lagged behind the US and China. When compared with organisations, respondents ranked the EU’s influence similar to that of the IMF.

Figure 71. Importance of EU as trade partner in Japan



Note: Based on the answers to survey Q14: Looking from Japan’s perspective, how strongly do you agree or disagree with each of the following statements about the economic relations with the European Union? The European Union is an important trade partner with Japan (N = 1410)

Figure 72. EU's influence in global economic affairs compared with countries and other international organizations



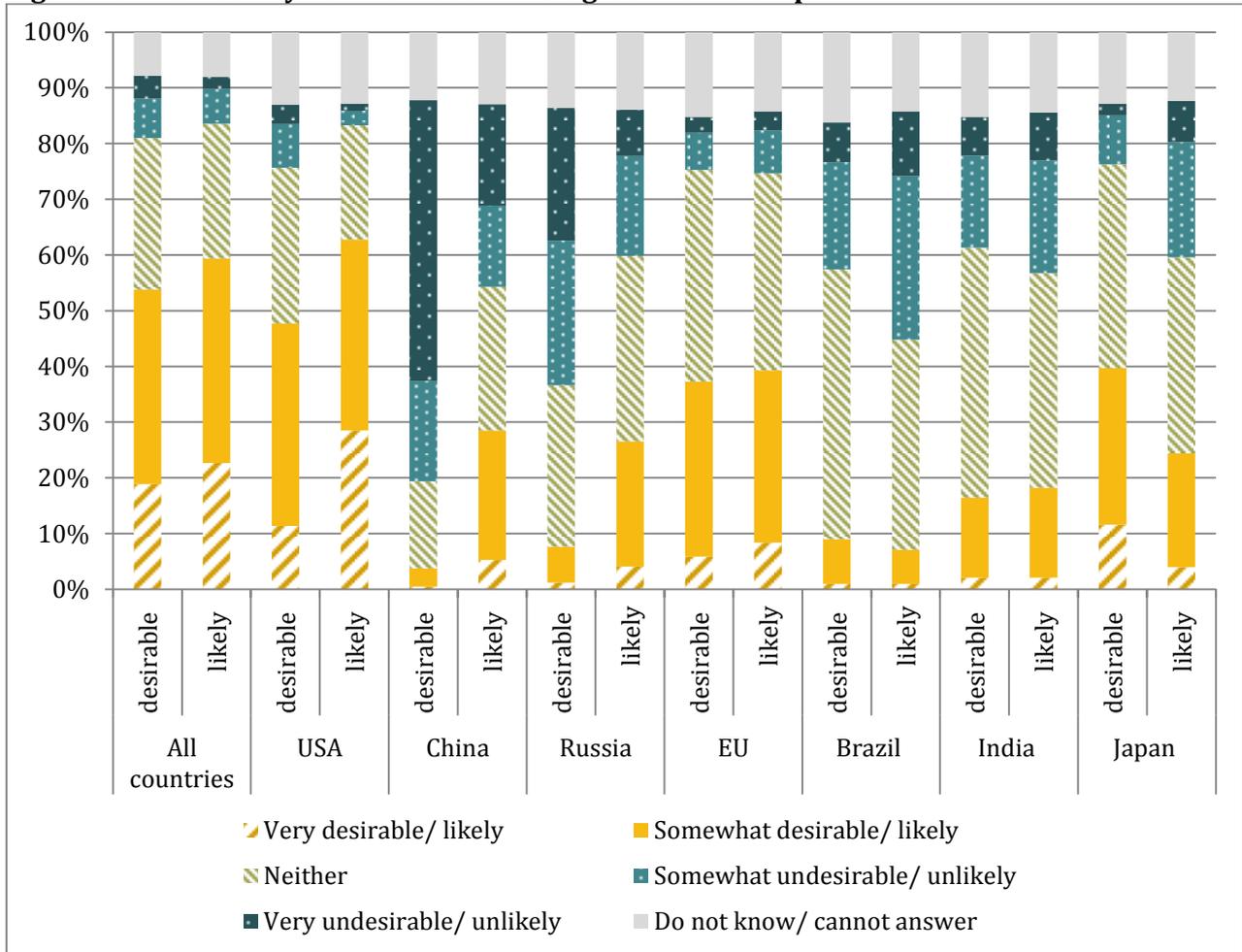
Note: Based on the answers to survey Q6: In your view, how influential in global economic affairs are the following countries and organizations? (N = 1024)

Politics and security

Unsurprisingly, the *media* mainly concentrated on terrorism under this heading with the majority of EU articles concerning Islamic fundamentalism. More uniquely, there were reports on the former European Council President Herman Van Rompuy appointment as Haiku Ambassador by the Japanese government. As for sub-topics 'migration from North Africa' represented the greatest volume (32 in total), followed by terrorism (4), privacy (4), workers protection (2) and *haiku* (2). In the 'Europe' dataset, the continent was still often depicted as a region that enjoys peace – marking a stark contrast with Asia where various tensions can be found.

The EU's leadership in world affairs was seen as desirable by the *general public* (although ranked below both the US and Japan). On the likelihood of this in fact occurring, the EU trailed the US who were also seen as remaining the major player in world affairs in the future (see Figure 73). Japanese public opinion evaluated the EU's peace and security performance as similar to that of the UN. Looking more specifically, the EU's performance in peacekeeping operations was regarded slightly more positively than military operations or the fight against terrorism.

Figure 73. Desirability vs. likelihood of EU's global leadership



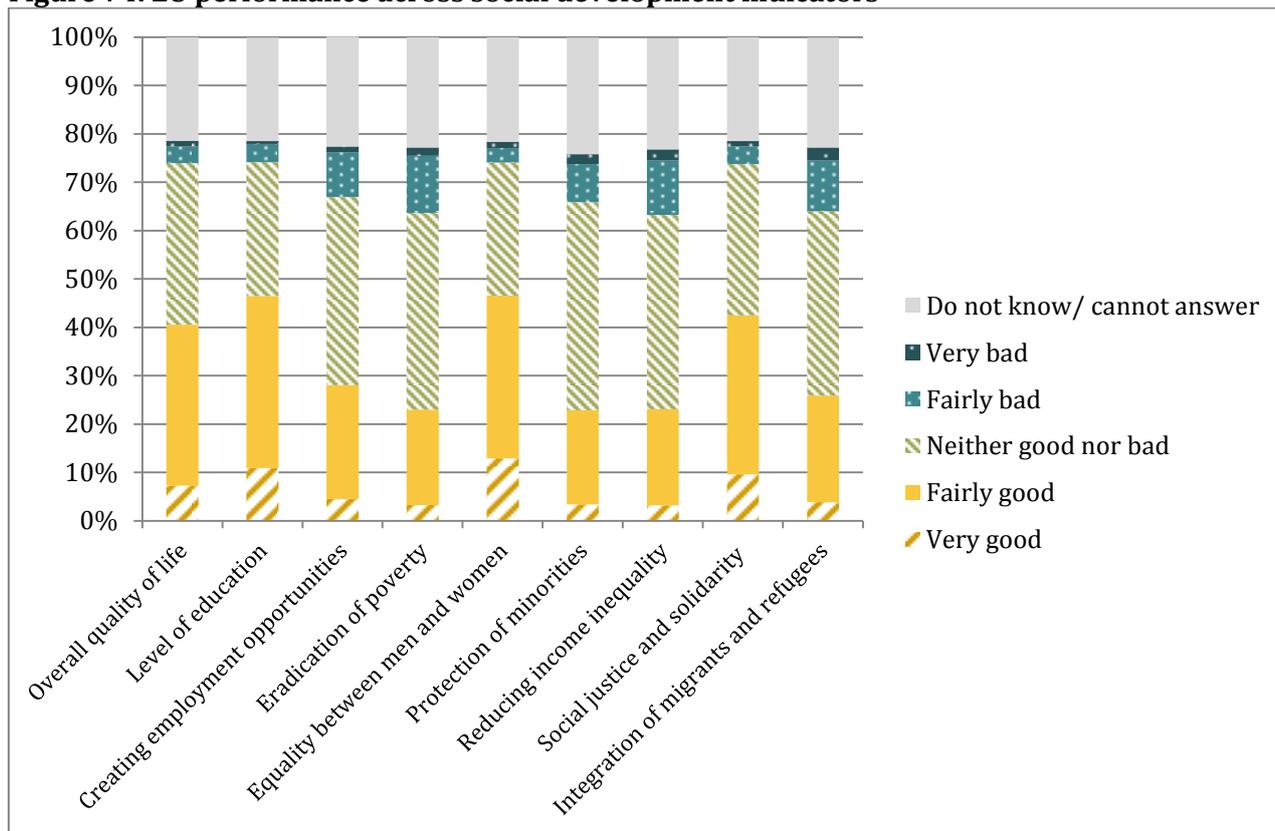
Note: Based on the answers to survey Q4: How desirable is it that each of the following countries and organisations take a strong leadership role in world affairs; and Q5: How likely or unlikely is it that each of the following countries or organisations will take a strong leadership role in world affairs five years from now? (N = 1024)

Development (social internal and international)

Japan's *media* mirrored the utter disinterest of the other Strategic Partners towards international development news. For both datasets, just three news items were published (all *Yomiuri on* disaster relief to Nepal). Speaking about support to developing countries, Japanese public opinion respondents viewed the EU as less important than the US, Japan or the UN and evaluated similarly to the WB.

In *public opinion* towards **internal social development**, Japanese respondents saw the EU as performing fairly well in social justice and solidarity (e.g. social rights, the public welfare system), as well as in gender equality (see Figure 74). Furthermore, the EU's performance in overall quality of life was among the most positively evaluated areas of social development. One rare elite development comment was that 'the EU is consistent, but its approach and emphasis looks a bit different from Japan. The EU focuses more on basic human needs, whereas Japan focuses on industry' (Academia/ Business/ Civil society, Exchange coordinator).

Figure 74. EU performance across social development indicators



Note: Based on the answers to survey Q17: Generally speaking, how well do you think the European Union performs in each of the following areas of social development? (N = 1024)

Migration, multiculturalism and human rights

In the ‘social & cultural affairs’ frame there were many EU articles on Libya and on refugees and migrants from Africa and the Middle East. In terms of figures, the largest number of articles were found about migration, followed by crime, social legislation and welfare albeit with smaller numbers. ‘Migration from North Africa’ represented the greatest volume (32 in total), followed by terrorism (4), privacy (4), workers protection (2) and *haiku* (2).

In the Europe dataset ‘human rights’ had the largest number of articles (10), followed by ‘sustainable development’ (9). The US Supreme Court ruling on same-sex marriage and the Irish referendum on the same topic were reported.

The *public opinion* survey contained several questions on specific human rights issues. Results showed that in Japan the EU’s dealing with refugees (and displaced people) was seen as less positive when compared to the overall fairly positive evaluation of the EU’s performance in other fields. This area clearly stands out as the one that respondents least often evaluated positively. The EU’s performance in integration of migrants and refugees was also seen as less positive among other areas of social policy. For comparison, respondents evaluated the EU’s performance in gender equality as the most positive among other human rights related issues listed in this survey question. Lastly, Japanese respondents saw the EU’s performance in the field of promoting and defending human rights worldwide very similarly to how it fared in social development, with the main rivals in these areas being the UN and the US. Japan was only slightly lagging behind the EU. The role of other countries was seen as substantially less important than the role of the UN, the US, the EU and Japan.

Environment and energy

Just three articles on energy appeared in the 'EU' dataset (natural energy, new Russian pipeline and wind power). In the Europe dataset, *Nikkei* (with 20 of the 28 articles published) was the only newspaper to give much attention to energy. The largest sub-frame was 'competitiveness', followed by 'sustainability: wind power and natural gas' were the leading topics and reported as business issues, reflecting the *Nikkei*'s focus.

There were 42 EU articles (most carried by *Nikkei*, followed by *Asahi*) in the 'environment' frame, all but three concerned COP21. As Japan's domestic debate on its position towards COP21 was at its peak in April-June 2015, the EU was often mentioned as a reference point. In many such articles, the EU was only a minor topic, but it was often regarded in a normative framework as being ambitious and forward-leaning. Counter-intuitively, very few articles linked 'Europe' with environment. The number was low (19) and the focus on the 'external' stories (15) - once again COP21 dominated.

The reflections from the undergraduate group discussion were that in the area of environment, the EU looked active and coherent, taking account of its policies towards the Kyoto Protocol. But its effectiveness was questioned.

The EU's role in fighting global climate change and protecting the environment was seen by the *public* similarly to its role in maintaining global peace and stability in the survey. The EU in this respect again fell behind the US and more Japanese respondents saw China as very important player in this field. In Japan, protection of the environment and the fight against climate change were not among the fields in which the EU was seen as standing out the most. Japanese saw the EU's performance in green technologies similarly to that in other economic activities.

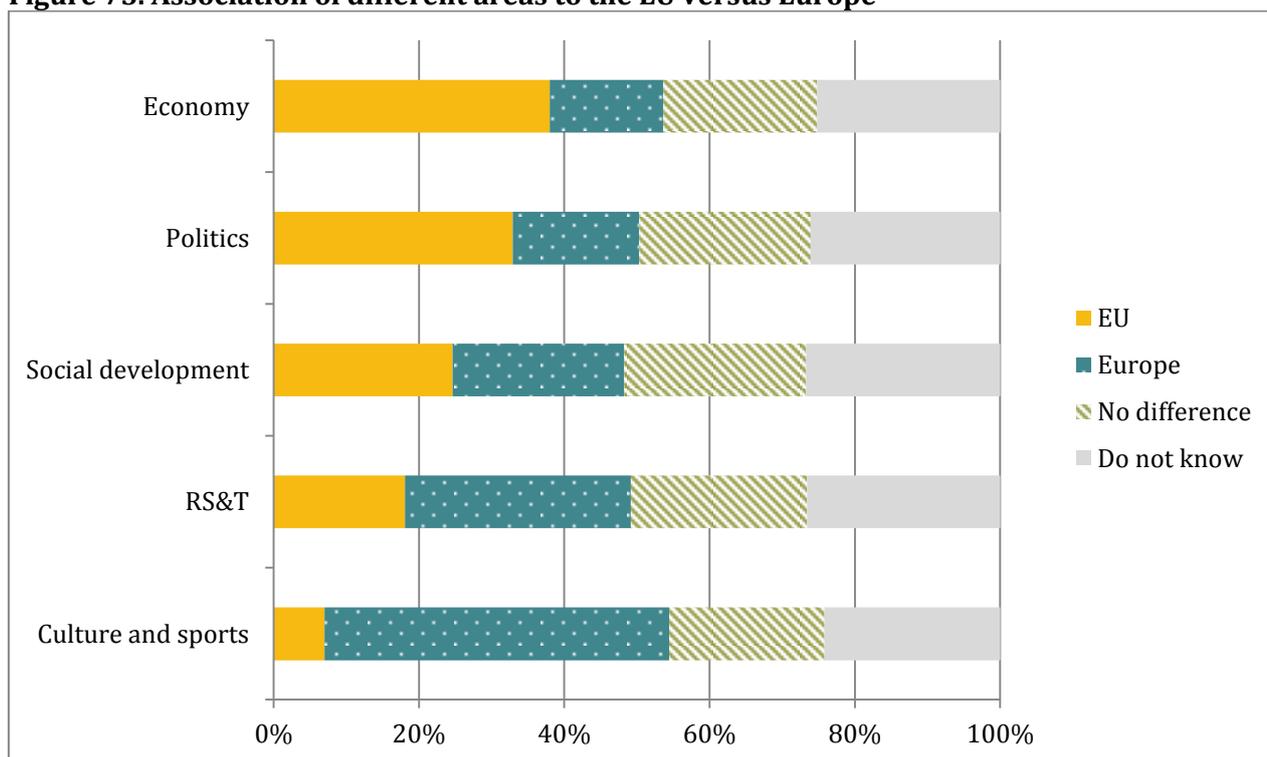
Research, science and technology

Looking at the minor frames found in the Japanese EU news reporting just five articles fell into the 'research, science & technology' frame (these concerned 'IT and robotics', 'fusion power' and 'genetic engineering'). In the Europe dataset articles on 'space' appeared much more than others mainly because there were several articles on Japan's commercial rockets (satellites), where Europe is often referenced as another important player in commercial rocket launching. Other articles were on CERN, Higgs particle and biotechnology.

In the field of innovation and technologies Japanese *public opinion* saw the EU as lagging behind the US and Japan. Despite of this overall view on EU's importance in this field, respondents felt the EU performed fairly well in various fields of technology, as well as science and research. Respondents agreed that EU is an important partner for Japan in science, research and technology.

In terms of how respondents differentiate EU and Europe, science together with culture and sports were associated first and foremost with the term Europe, whereas economy and politics were firstly associated with the EU (Figure 75).

Figure 75. Association of different areas to the EU versus Europe

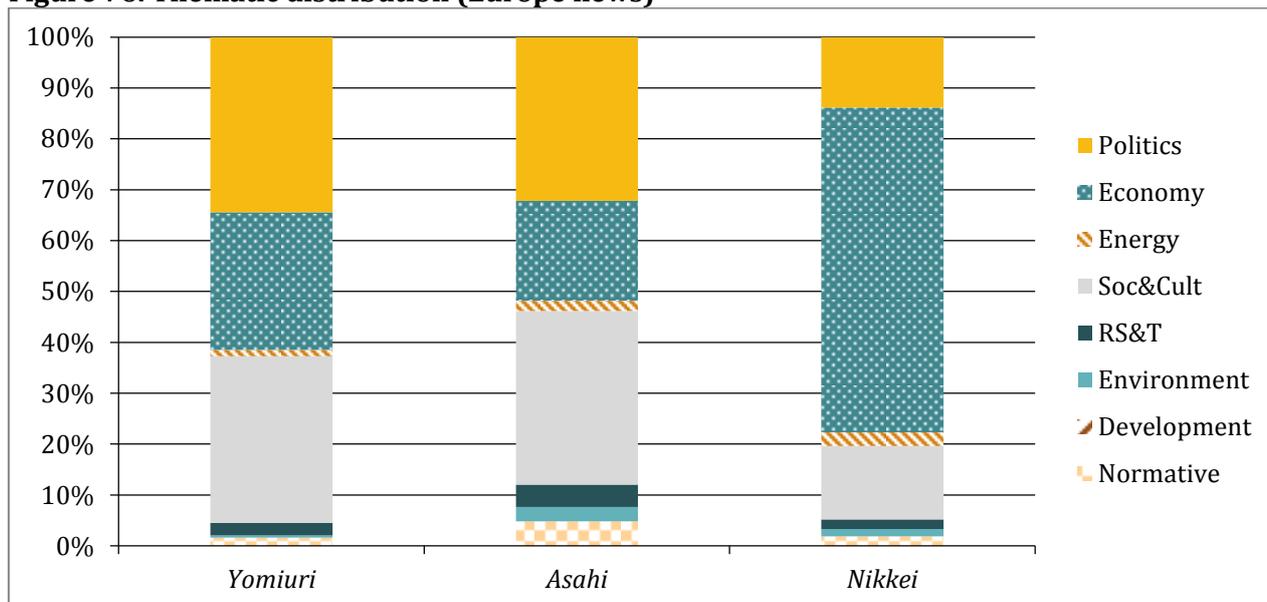


Note: Based on the answers to Q23: Some people think about Europe, whereas others think about the European Union when talking about economy, politics, culture, sports and other areas. In your case, which term – Europe or the European Union - comes to your mind first when you think about the following subjects? (N = 1024)

Culture

Social & cultural affairs were limited to the ‘Europe’ media dataset where they constituted the second largest frame of reporting for all three press outlets (see Figure 76). Here, articles featured exhibitions, movies, music and painting. Europe, in this context, is mentioned as a cultural actor, something not associated with the EU. ‘Sports’ and ‘entertainment’ were the two largest sub-frames, but a number of other sub-frames also included articles mentioning Europe – indicating that Europe has multiple faces in Japan. The ‘FIFA scandal’ that erupted during the three-month period of analysis recorded the largest number of articles in all the newspapers.

Figure 76. Thematic distribution (Europe news)



For the Japanese *public*, when compared to other countries EU Member States are seen as particularly attractive for their culture and lifestyle. Even though respondents evaluated all areas related to European culture very positively, they were more likely to choose arts and historical heritage over food and cuisine, lifestyle, sports, cinema and theatre.

The elite interviews conveyed a number of cultural themes covering social issues - particularly food and agriculture - and as an extension, values and life-style, as well as Europe's cultural and normative influence. The impact was not always viewed benignly, however: as expressed by one newspaper editor - 'What is at stake is the very life-style. The reason why wine has become so popular in Japan has to do with Europe's efforts to introduce European life-style in Japan.' (Media, Editorial writers). Obviously, 'culture' brought Member State ideas to the fore as this series of interview quotes illustrates:

'The UK and France are particularly active in people-to-people exchange and dialogue including in the areas of culture' (think tank, Research fellow).

'In terms of culture, the UK Embassy has been trying to catch up with the French. When it comes to Europe, people's interest in culture is always high in the first place.' (Media, Editorial writer)

'France has been particularly active and successful, particularly through the Alliance Francaise. People's interests in Europe often start with languages and cultures. Britain and Italy are doing well in this regard, too' (Policy-makers, MOFA official).

Education

The *media* were broadly dismissive of education as a mechanism for reporting EU news (just two stories); even in the Europe dataset the total was modest at 19 stories. Consequently, the public opinion survey results that placed the EU Erasmus programme as the least recognisable EU activity was hardly surprising (even if respondents were generally impressed with Europe's level of education and acknowledged the importance of the EU in educational exchanges).

Elites were more informed and supportive of EU and Member State education programmes in Japan, often calling for more youth exchange programmes (but coupled with the need to evaluate their implementation to gauge effectiveness). Not surprisingly, academic initiatives frequently surfaced in the interviews:

'The EUIJ (EU Institutes in Japan) and EUSI (EU Studies Institutes) initiatives have been successful in promoting various aspects of European integration. I hope the programme (and the funding from the EU) will continue.' (MOFA official)

'For example, I often attend Keio EU Kenkyu-kai (Keio Jean Monnet Seminar for EU Studies) and EUSI-hosted event at Keio University like the one today – panel discussion with Mr Herman Van Rompuy, former president of the European Council. These are helpful.' (Media, Editorial writers)

'How to involve younger generation is something that they need to think more about. As for think tanks, the Tokyo Foundation has been working quite well with the EU Delegation, but I am not quite sure they are really good at 'using' different think tanks for their own purposes' (think tank, Research fellow).

The EU as a norm-setter

In the penetrating 'normative' EU frame the largest number of articles (28) concerned 'sustainable development', usually in relation to COP21, followed by articles on migration from North Africa in the context of 'human rights' (19). *Nikkei* displayed a unique orientation with 15 articles related to the 'rule of law'. These were articles on anti-trust, reflecting the high level of attention paid in Japan the European Commission's anti-trust investigations against such high-profile IT companies as Amazon and Google in the April-June 2015 period.

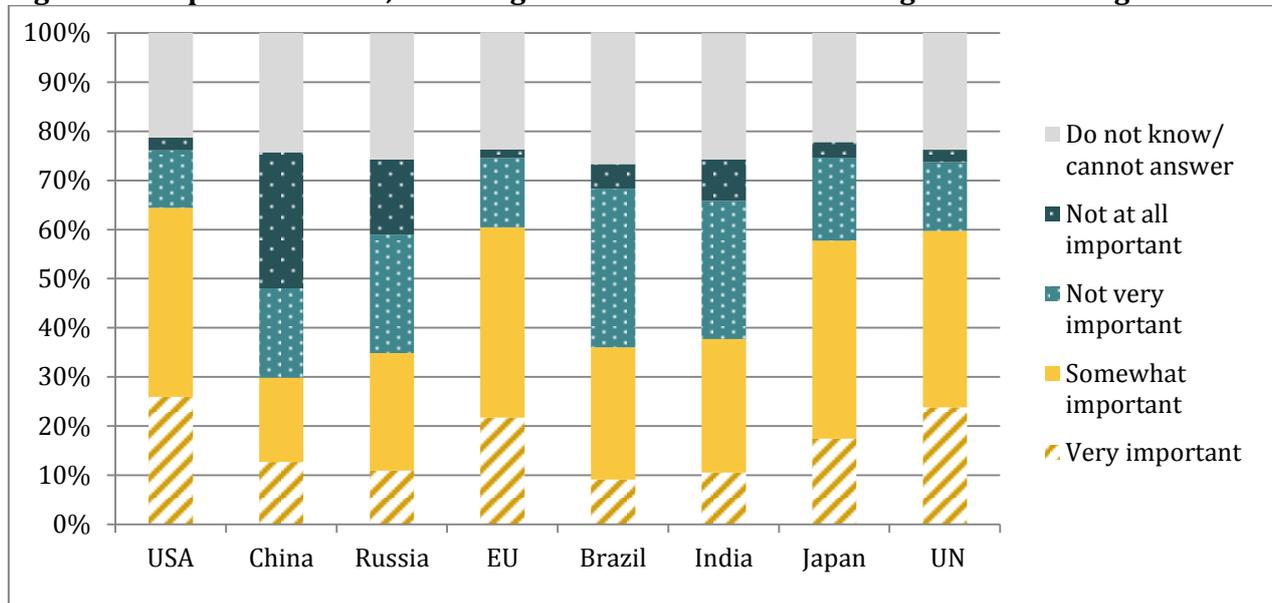
For the 'Europe' dataset, human rights (in the 'social and cultural' sub-frame) had the largest number of articles (10), followed by 'sustainable development' (in the 'environment' sub-frame) (9). Examples were articles on COP21 and other related topics on environment and energy regarding sustainable development. As for human rights, the US Supreme Court ruling on same-sex marriage and the Irish referendum on the same topic were reported.

According to a Ministry of Foreign Affairs interviewee, the EU's approach to human rights was perhaps 'coherent, but not necessarily effective.' The impact of the EU's normative power in terms of security and human rights was further explained in one think tank interview:

'The role of the EU in Japan looks passive – they are not quite active in promoting the EU's security role... The EU's role in international development assistance is often discussed in Japan. Human rights are actually a bit tricky – although it is commonplace to argue that Europe and Japan share fundamental values, when it comes to how to deal with refugees and the issues of human trafficking, I am not sure how much Japan shares Europe's approach. Minority rights may be another area where there does not seem to be much commonality between Europe and Japan. I guess Europeans are aware of such differences, but do not dare to highlight or discuss those with Japan. It may be a pragmatic attitude, but Europe could raise those issues more in their dialogue with Tokyo.'

Public opinion in Japan saw the role of the US as the most important in the field of promoting and defending human rights worldwide, although it was found to be somewhat comparable to that of the EU as well as the UN and Japan itself (Figure 77).

Figure 77. Importance of EU, other organizations and countries in global human rights



Note: Based on the answers to survey Q10: In your view, how important a role do each of the following countries or organisations play in promoting and defending human rights worldwide to protect human dignity, freedom, equality and solidarity? (N = 1024)

3.5.4 Local conditions: explaining the perception of the EU in Japan

Perceptions are a result of interactions between internal (Japan-specific) and external (EU-specific and global) factors. There are several possible explanations for the profile of EU images and perceptions in Japan. The following analysis is based exclusively on the elite interview data.

The strongest explanation – at least for elite opinion – was that all the interviewees had studied or/ and worked in Europe and had extensive knowledge about Europe – thus their perceptions were obviously heavily formed by their personal experience including that of working directly with Europeans. It does not seem that any noticeable local conditions influenced their perceptions. Thus direct exposure to Europe is a key variable. Future studies of EU perceptions in Japan could look into a systematic comparison between elites/ stakeholders who have experienced the EU/ Europe first hand and those who did not.

3.5.5 Recommendations for EU Public Diplomacy

For the EU: there is a positive perception on the overall notion of ‘Europe’ as a whole, but critical of the seemingly elitist nature of the EU itself and the way in which it conducts policies. Thus while no clear obstacle or gaps were observed, the EU’s seeming elitist approach in a negative sense was mentioned frequently. Also, an interviewee talked about an ‘Asian values’ argument emphasising the difference and distinctiveness of Asia. This suggests that a period of reflection towards the EU’s Public Diplomacy style should be undertaken.

European states: predominantly positive views on individual countries' activities in Japan, perhaps reflecting the interviewee's strong interest in culture, life-style, foods and agriculture, in which European states as opposed to the EU as such are more relevant. The EU should leverage from this Member State asset better.

Relations are generally positive as Japan and Europe share a host of fundamental values – Japanese need not to worry about Europe. However, many interviewees pointed out that the EU's profile remains low. Member States are more visible. Japan-EU relations are seen to be good, but not particularly close. While there were positive perceptions in overall terms mainly because of shared values – some questioned how deep such sharing was. Some praised the EU's success in internal market integration and the realisation of the single currency. EU rules and regulations are well structured, but perhaps Europeans are over-confident, as one interviewee pointed out. A recommendation would be to use this solid and positive perceptions base as the starting point for a higher relevance of the EU within Japan. The challenge is not to 'correct' misperceptions, but rather simply to heighten awareness.

The EU needs to be aware of the nature of Japanese scepticism: (1) suspicion that the EU is only interested in China and India when it comes to Asia; (2) questions why the EU wants to do more in Japan while it has far bigger problems elsewhere (poverty in Africa, etc); and (3) the EU is already a major actor where it has power like trade and climate change – isn't it sufficient? Why the normative agenda?

Regression analysis showed that the likelihood of respondents seeing the EU as desirable actor in global affairs was positively correlated with higher age; older respondents were more likely to see an active role of the EU in international affairs as likely. They also saw the relationship between the EU and Japan in a more positive light. On average, older respondents also tended to give a more positive evaluation of the EU's performance in various fields. They were also more likely to evaluate the culture and lifestyle of the EU countries as being attractive. This finding suggests that EU Public Diplomacy should invest into targeting the younger generation in Japan (and use appropriate and appealing mechanisms).

While no major problems or impediments were identified in the research, the level of knowledge among ordinary people remains quite low. How to close (or at least decrease) this gap seems to be an important challenge.

The familiar categories where the EU might develop more effective partnerships were mentioned in the elite interviews: the Media, universities, civil society groups especially human rights groups. Importantly, the importance of reaching out beyond elites and involving ordinary citizens was also emphasised as well as to Government bodies other than those who already have regular contacts with the EU. Lastly, grass-roots organisations and SMEs, think tanks and SME-related bodies were mentioned. Given the limited nature of the EU's resources that can be spent in Japan, a clearer prioritisation is also an indispensable recommendation. However, the EU does not seem to be quite clear as to whom it wants to reach out and what it seeks to achieve in terms of its Public Diplomacy.

Recommendations for EU Public Diplomacy in the eyes of EU Delegation to Japan

From the perspective of practitioners at the EU Delegation on the ground there are three priority areas for PD outreach in Japan: networks need to be geographically extended to areas outside Tokyo and other bigger cities. Second, inputs from the Brussels headquarters need to be received very timely as not only time shifts but also translation periods need to be taken into account. And third, the Public Diplomacy framework needs to be developed pointing out priorities, key messages and a toolkit providing potential outreach activities which then can be tailored to the local context – the very purpose of this research project.

3.6 Mexico

This Country Chapter presents a synthesis of the Mexico-specific findings of media analysis; elite interviews 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 Mexico according to the research criteria applied – namely visibility; actorness and local resonance; and norm-setter. Moreover, in the section on actorness and local resonance, we discuss these according to the themes analysed in this research: economy and trade; politics and security; normative and human rights; development – including the social internal and international dimensions; migration, multiculturalism and human rights; environment and energy; science, research and technology; culture; and education. The final section before policy recommendations looks at the local conditions that explain the perception of the EU in Mexico. Finally, we conclude the chapter with recommendations for Public Diplomacy, including a subsection on recommendations in the eyes of practitioners based at the EU Delegation to Mexico.

3.6.1 Sample

Public opinion

The online omnibus survey was coordinated and analysed by the Public Policy and Management Institute (PPMI) and conducted by TNS Global. The respondents in Mexico were surveyed in Spanish. Data collection took place in August 2015. The online omnibus survey was designed to be nationally representative with regards to age, gender and region. The survey covered a total sample of 1164 individuals within the 16-64 age group.

Media

The media content analysis was designed, supervised and coordinated by the National Centre for Research on Europe (NCRE), University of Canterbury, New Zealand, and conducted by local researchers trained by the NCRE. Two popular prestigious papers *El Universal* and *La Jornada* and the business newspaper *El Financiero* were monitored daily between April 1 – June 30 2015 using e-search engine Press Display to ensure high accuracy in data collection. Two separate datasets were collected over the period of observation – ‘EU’ (551 articles) and ‘Europe’ (372 articles). Volume across 10 countries is 505 for the EU dataset and 635 for Europe. Key search terms for dataset ‘EU’ included (with acronyms) ‘The European Union’, ‘The European Commission’, ‘European Parliament’, ‘European Court of Justice’, ‘European Central Bank’, ‘European Presidency’, ‘Council of the European Union’, ‘Eurozone’. The key search terms for dataset ‘Europe’ were ‘Europe’ and ‘European’.

Elite opinion

The NFG coordinated the interview programme and designed the questionnaires in close coordination with the Country Experts and the project partners. The NFG was also responsible for the training of the Country Experts and supervision of the implementation of the interviews. The interviews itself were conducted by the Country Experts. Interviews have been conducted as a source to identify upcoming trends and to cross-check findings. They are non-representative due to their current scope and should be considered as a tool for future evaluations in a representative volume. The NFG chose a three-phased approach: in Phase I, two transcripts were due until June 6; in Phase II, five interviews were due until

July 15; and in Phase III, five interviews were due until August 17. The NFG was in charge for the coding of the transcripts and the provision of the results to the project partners.

Interviews in Mexico were conducted in Spanish and translated and transcribed by the Country Experts. They interviewed 17 experts (Academia/ Think Tank (4), Policy-makers (3), Media (2), Civil Society/ NGOs (1), Business (5), Youth (2)) and chose to not hold a group interview.

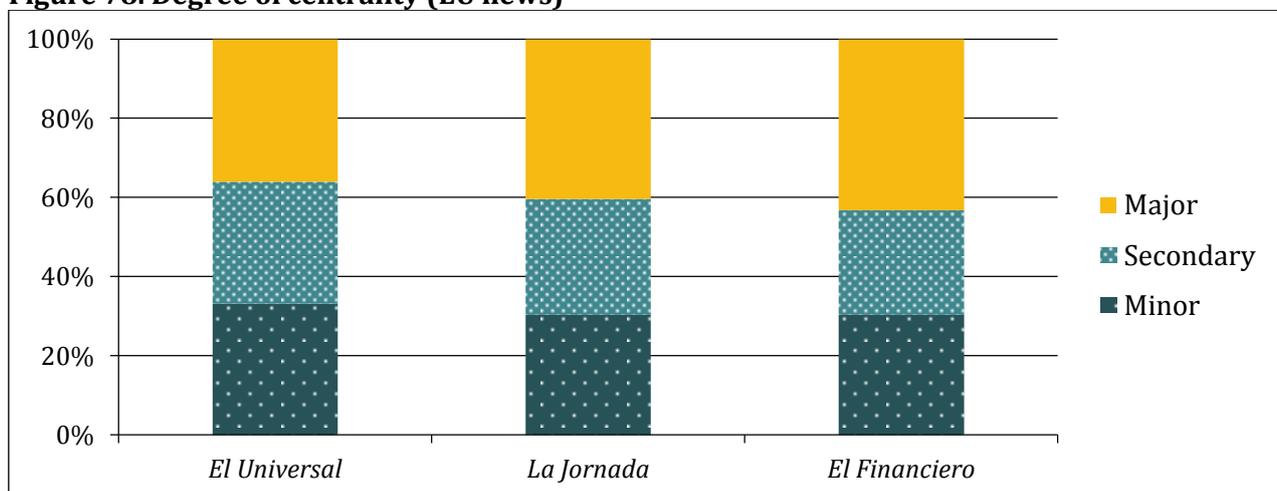
Semi-structured, anonymous qualitative interviews under Chatham House Rules were conducted with all EU Delegations across the 10 Strategic Partner countries, primarily in the form of a group interview. The groups included Heads/ Deputy Heads of Delegations, Heads of Press and Information Section and/ or Heads of Political Affairs Section. Interviews lasted between 60 to 90 minutes. In Mexico, one diplomat was interviewed.

NB: two robust datasets collected in the course of public opinion survey and media monitoring allow for quantitative and qualitative analysis of data (for more detailed information, please see attached country-specific media and public opinion reports). Survey of elite opinion is impressionistic due to small numbers of the interviews. Data collected is analysed using qualitative approach.

3.6.2 Visibility

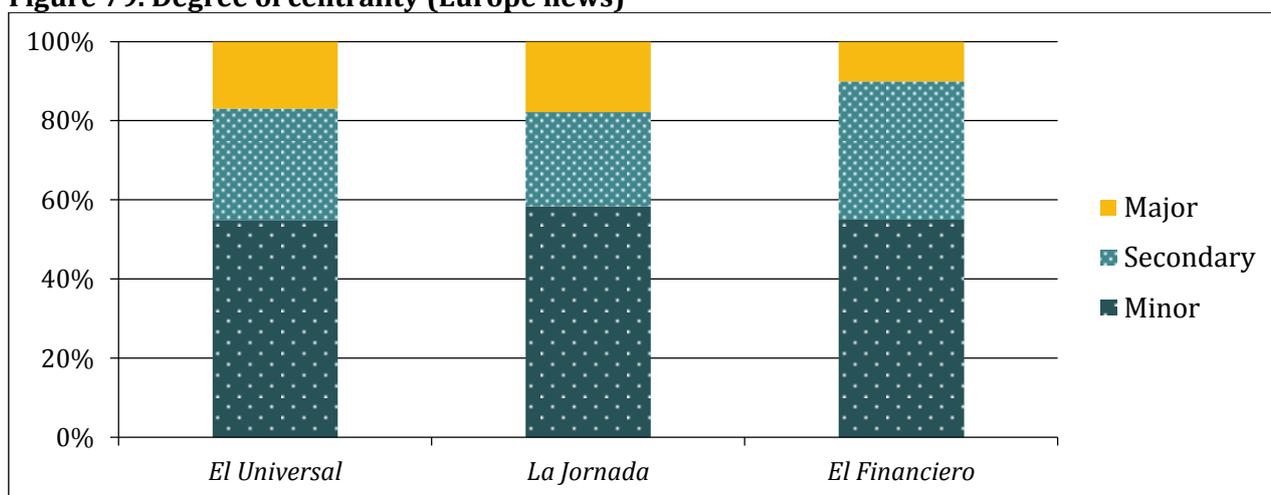
What are the broad conclusions that can be deduced about visibility drawn from the volume of news stories published on the EU in Mexico? First, coverage is moderate yet in-depth articles on the EU have some presence (see Figure 78); second, local sources are typically used; third, the EU’s domestic politics are highly criticized (especially, the possible UK exit, the Greek crisis, the overall state of the economy, and its approach to the migration crisis in the Mediterranean). However, the EU’s image is a positive one on human rights, good governance, negotiations with Iran, and EU-Mexico relations. Politics, economy and society dominate reporting with little coverage of development, energy, environment, and RS&T news about the EU in the Mexican press. The degree of centrality of the majority of the articles for all three outlets was either minor or secondary. Major articles amount for less than 40 per cent in each outlet. Most of the EU articles appear in Mundo (World) sections or Economía/ Cartera (Economy) sections; long articles were only around 10 per cent of the EU news stories and visual support was rarely used.

Figure 78. Degree of centrality (EU news)



Similar conclusions can be made about the visibility of ‘Europe’ in the media. In depth articles are very rare; the majority use local sources; domestic European politics are criticized; Europe was not used as a synonym for the EU and again there was little mention of development, energy, and environment news about Europe. In terms of topics, social and cultural articles were more visible than those on politics. The degree of centrality in the majority of the articles for all three outlets are either minor or secondary. Major articles amount for less than 40 per cent on each outlet. Most of Europe articles appear in Mundo (World) sections or Economía/ Cartera (Economy) sections and were typically medium or short in length. Typically Europe was mentioned generally with no in-depth analysis of the region (Figure 79).

Figure 79. Degree of centrality (Europe news)



Turning in greater detail to the EU dataset, the degree of centrality of the EU reflected the nature of the news topic. All three presented a similar distribution concerning the degree of centrality (the EU played a major role in around 30 per cent of stories printed in the three newspapers). Interestingly, the fewest articles were those where the EU was a secondary actor. There were recognisable differences in the length of the articles between outlets. *El Universal* had more medium-length articles rather than short ones: this publication tended to be the more analytical about the EU. Also, *El Universal* preferred to use local-correspondents rather than rely on international agencies. This is relevant in terms of length because articles written by local-correspondents typically presented the authors’ views, while those drawn from foreign agencies were mainly factual. *El Financiero* presented the greatest number of short pieces because of the nature of the outlet: precise factual economic news. Long articles about the EU were almost non-existent.

The majority of the articles in both *La Jornada* and *El Universal* were in the World section, reflecting the topics being reported - the Iran deal, the migration crisis, the Greek crisis, the EU-Celac Summit, and the UK election. These events were mostly political, which made the World section (and also Politics in *La Jornada*) the default section for EU news. *El Financiero*, since it is a business publication, presented more stories in either the Economy or Markets sections, although the World section was still the third most popular for EU reporting. It is necessary to note that while the Greek crisis was the most covered issue, which intuitively would suggest that the vast majority of articles would appear in Economy or similar sections, in fact the focus of most of the articles was on the political difficulties, debate, and

negotiations surrounding the debt crisis rather than examining the economy per se. Consequently, the Economy sections in *La Jornada* and *El Universal* were only the second most popular for reporting EU news rather than the first.

In terms of EU actors, the nature of the news determined which actors dominated the EU articles in the Mexican media. The European Commission and the European Central Bank were by far the most mentioned EU institutions. While the ECB's presence was only logical because of the Greek Crisis (it was mentioned in almost every piece of news regarding the crisis, with mostly negative views), the visibility of the European Commission transcended the Greek Crisis. The Commission was mentioned in almost all of the dominant themes of EU news. It enjoyed high visibility (mostly positive) in articles concerning the Iran deal, and it also enjoyed some visibility in the items about the migration crisis (more neutral to negative).

The most mentioned Member States corresponded to the most relevant news. Greece was by far the most mentioned actor since the Greek crisis was the most reported EU news story in the Mexican media (it was visible throughout the three months). Germany and France were also frequently mentioned because of their role in the Greek negotiations. It was typical to see Germany twined with Greece in the articles. France also gained recognition because of its relations with Cuba in the context of the EU-Celac Summit in early June. The visibility of the UK was explained by the General Election and the discussions about a possible Brexit. However, while the coverage of the UK election in early May was intense, the UK's visibility eroded as time progressed. Italy's visibility remained almost exclusive to articles about migration.

The most mentioned EU leaders were from the most mentioned EU institutions. Juncker and Mogherini were frequently mentioned because of their role in the Iran deal, the migration crisis, or the Greek crisis. The visibility of Tusk and Draghi was exclusive to the Greek crisis articles. In terms of EU member state leaders, the Greek, German, and British leaders dominated visibility. Tsipras was the most cited leader (with Varoufakis the fifth most mentioned). Merkel was second, and David Cameron enjoyed significant visibility because of his referendum proposal, surpassing the consistent but low presence of François Hollande in several issues. Italy's Renzi also enjoyed some visibility because of the migration crisis. It is necessary to note that there were many other leaders mentioned. Importantly, in terms of EU leaders, the Mexican media outlets showed their deep understanding of the EU. For example, leaders like Stravos Lambrinidis or Jeroem Djisselbloem also enjoyed visibility because of specific news articles that dealt with their political positions within the EU.

Now turning in greater detail to the 'Europe' dataset, the visibility of Europe in Mexico's media was significantly lower than for the EU. The Mexican media possesses a deep understanding of the EU and its functions, which makes articles solely about Europe, or articles in which Europe is mentioned without the EU, less frequent. The vast majority of the articles in the Europe dataset only mention Europe once or twice, using it mostly as a geographical point of reference. And the themes of the articles were extremely varied.

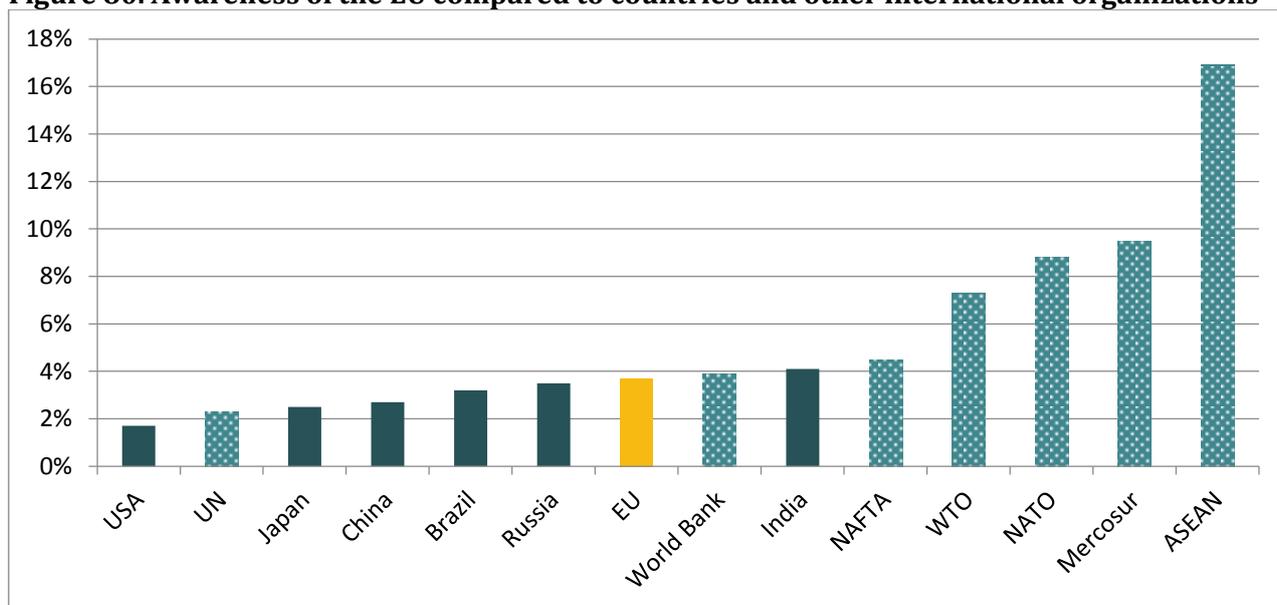
The degree of centrality for the Europe articles exemplifies the way in which Mexican outlets used the concept of Europe vis-à-vis the EU. While in the EU dataset the majority of news items were major in centrality, in the Europe dataset major articles were under 20 per cent; minor articles were more than 60 per cent. Indeed, most of the articles that mention Europe

do not really talk about Europe. This reinforces the conclusion that the Mexican media have a deep understanding of the EU, and are able to report it accurately when dealing with news about Europe instead of using Europe as a synonym. The length for the Europe articles was similar to those for the EU. The majority of articles were either short or medium, with long articles extremely rare.

Ultimately, the placement of Europe news was more widely dispersed throughout the paper than EU news. Even though the World and Economy were the predominant sections, there were more Europe articles in other sections than EU ones. This factor also reinforced the notion of Europe being used in Mexican media as a geographical indicator rather than as the focus or topic of the news.

What, then, were the *public opinion* findings on visibility? The overall visibility of the EU was similar to that of the countries used for comparison (albeit higher only than India), and higher than all other international organisations (except the UN) (see Figure 80). Compared to other countries, the EU was among the most positively viewed (lagging behind only Japan) and at the same time was rarely seen as negative (surpassed also only by Japan): compared to international organisations, respondents evaluated the EU positively, but less so than the UN.

Figure 80. Awareness of the EU compared to countries and other international organizations



Note: Based on the answers of option ‘Do not know/ cannot answer’ to survey Q1: Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations? (N = 1164)

The *elite* interviews produced a long list of those areas where the EU was deemed the most visible. Within the EU itself the topics raised included: the European social model and cohesion; the European welfare state (its apparent decline and what can be learnt from it); human rights (this time reflecting the assumption that there is a systematic violation of human rights in Mexico and what could be learnt from the European institutions); Neighbourhood policy; and transport. The themes touched on related to the EU’s external actions covered peace keeping; security (military security and human security); bilateral and regional relations (EU-Latin America); migration; development; and organised crime. Clearly, the EU had a high level of elite visibility.

3.6.3 Actorness and local resonance

The EU as a local partner

For 'EU', all three outlets focused mostly on the economy, followed by politics and society with low coverage of other frames (Figure 81). EU political news was mostly external. Normative articles were mainly focused on politics or social/ cultural, and on issues of peace, rule of law, and mostly human rights. In the Mexican *media*, the EU actions were reported within an EU general context, but even more visibly within the context of specific Member States (Figure 82). The EU was framed in these locations as an actor who mainly acts on the European continent, with its own members and their citizens. This focus of domesticity was somewhat predictable, due to the severity of the unfolding crises in the EU. A share of EU news with the local 'hook' was on the lower end of the continuum.

Figure 81. Distribution of thematic frames (EU news)

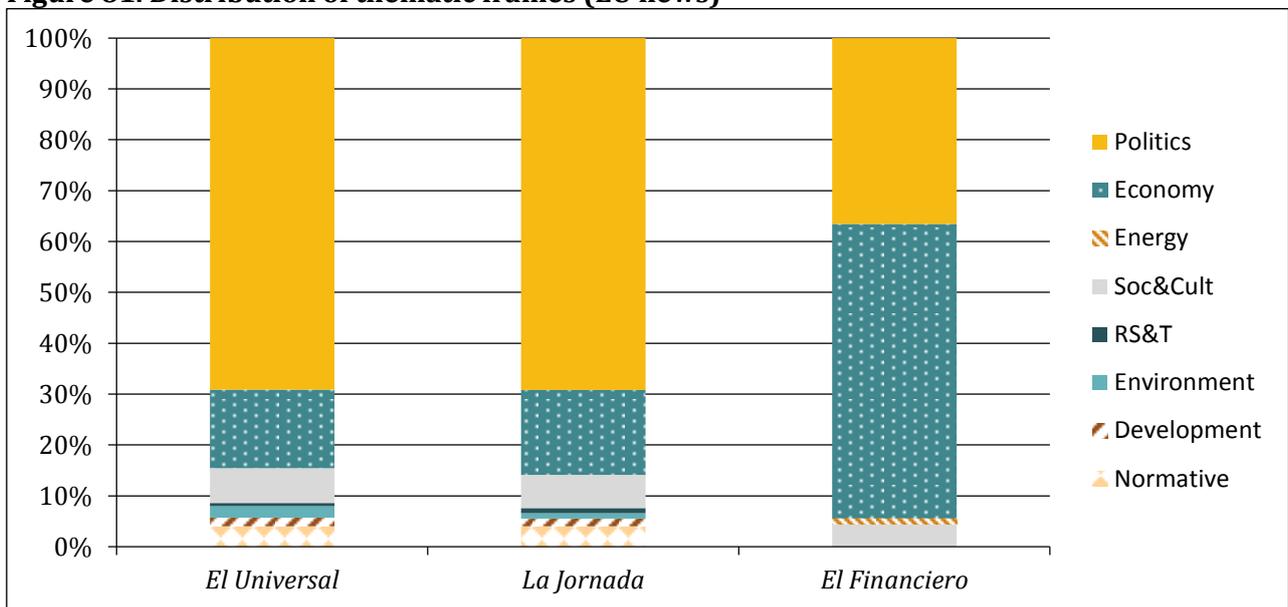
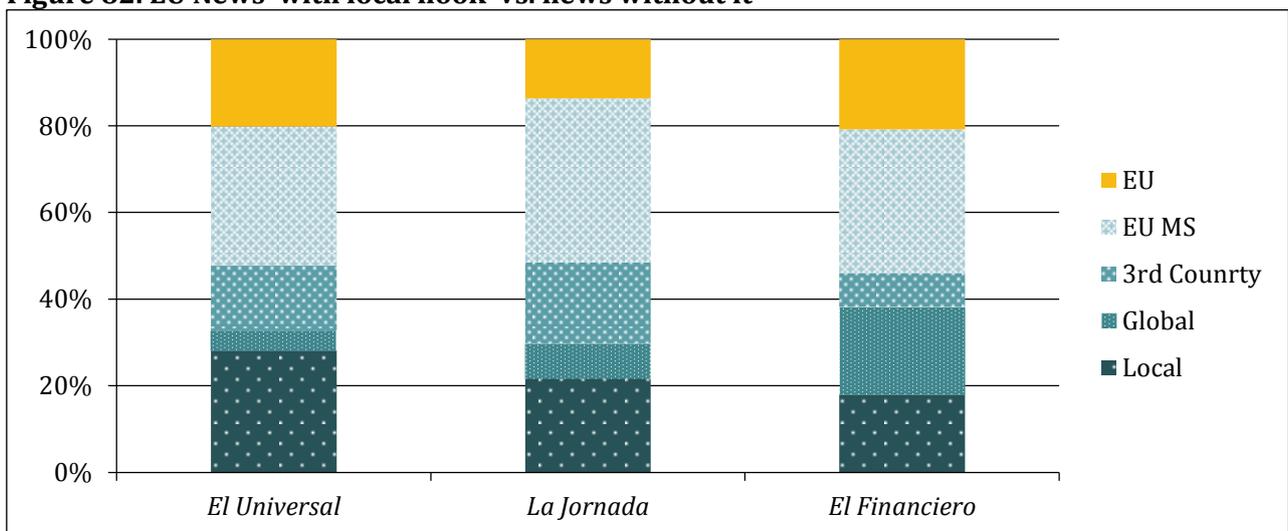


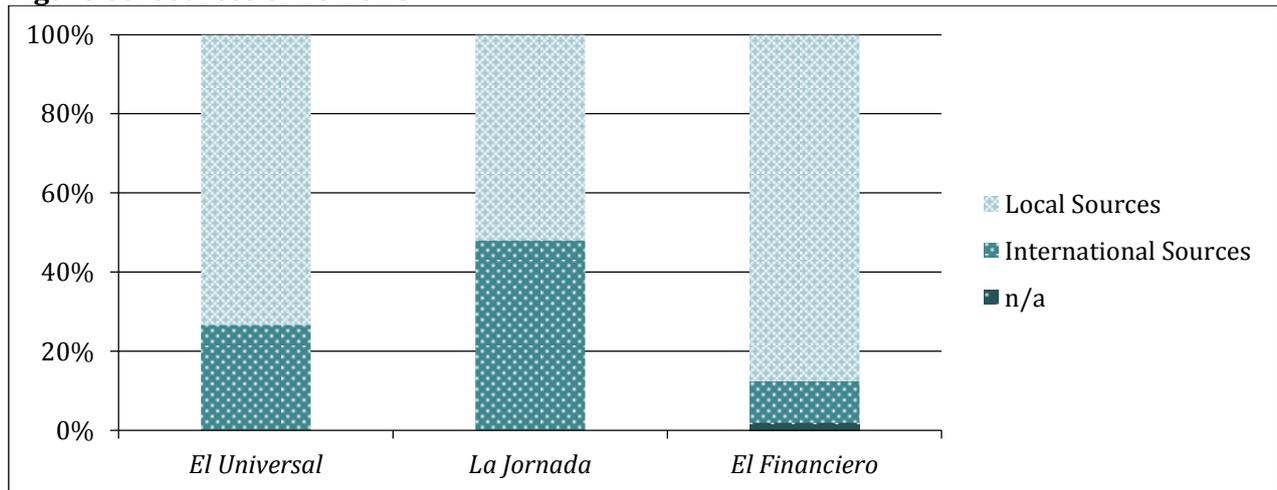
Figure 82. EU News 'with local hook' vs. news without it



All three media outlets relied heavily on local-correspondents or local sources (Figure 83). This meant that the EU image portrayed by the Mexican media reflected Mexican views

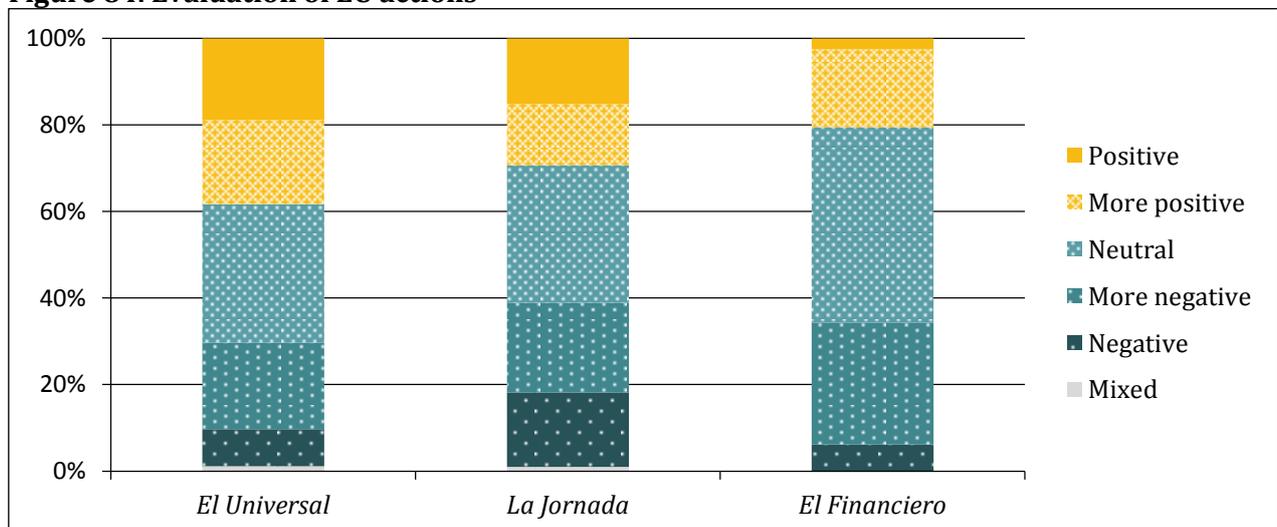
rather than those of international news agencies. The differences between the outlets in their use of international sources seem to correspond to differences in budgets rather than any other reasons. *El Financiero* and *El Universal*, which have a higher circulation than *La Jornada*, take only between 10 per cent and 25 per cent of EU articles from international sources, while *La Jornada* takes almost 50 per cent. Reuters was the most frequently used for EU news, and the only agency used by all three newspapers. AP, DPA, and AFP were also regularly used. What is interesting to note is Xinhua, the Chinese news agency, was the fifth most used agency by the Mexican media when reporting EU news. This corresponds to the editorial line of *La Jornada*, which was the only one that relies on Xinhua.

Figure 83. Sources of EU news



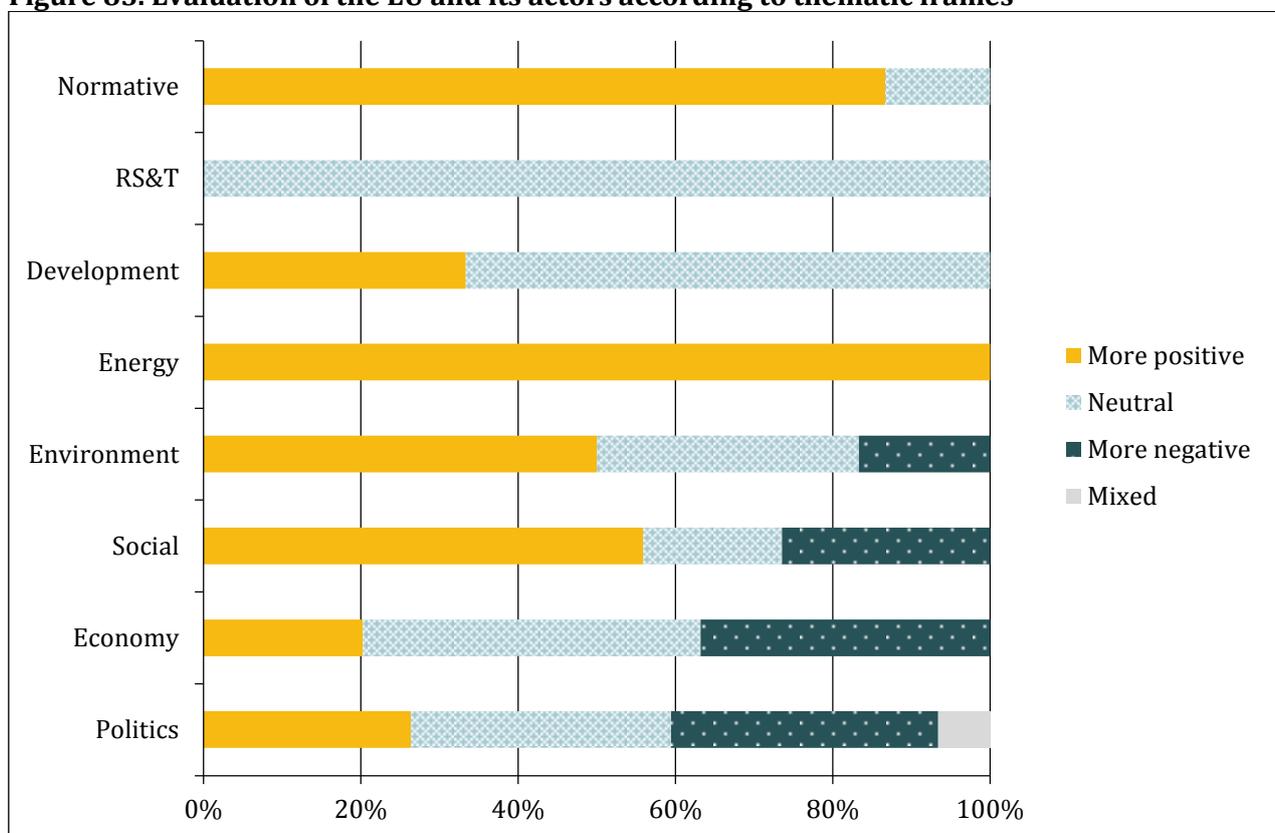
The overall evaluation of the EU in the Mexican media was found to be between neutral and negative (Figure 84). In terms of news outlets, *La Jornada* was the most critical of the EU, and had almost 48 per cent of articles either negative or negative/neutral in tone. The corresponding figures for *El Financiero* and *El Universal* were around 34 per cent and 29 per cent respectively. Ultimately, the overall proportion regarding the evaluation of the EU in the Mexican media reflected the level of coverage concerning political internal issues, where the outlets were highly critical of the EU and its actions (especially over the Greek crisis and migration).

Figure 84. Evaluation of EU actions



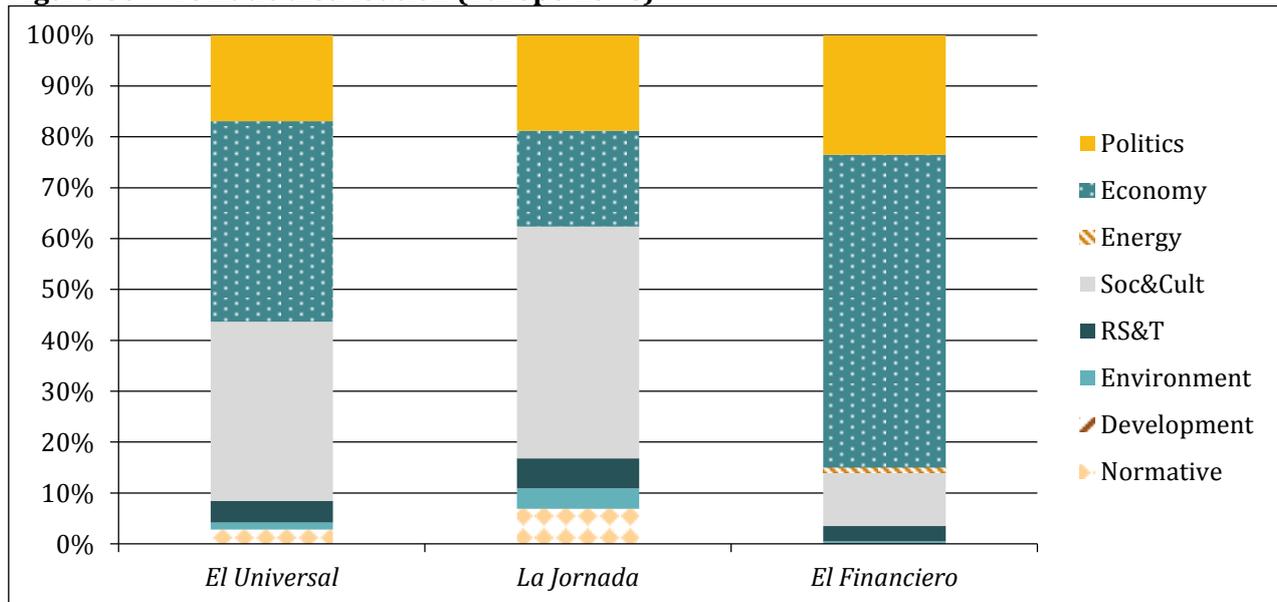
The three most important frames presented the most negative evaluation of the EU. First, the most visible frame (politics) had the largest volume of negative evaluations (almost 36 per cent) (see Figure 85). Positive evaluations of the EU in the politics frame came mainly from the Iran deal. In the economy frame there was greater neutrality because of the nature of the news. Many of the articles only presented economic outlooks or factual information without any normative evaluation. Nevertheless, the proportion of negative articles in the economy frame was similar to that for politics mainly because of the overall situation of the Eurozone economy and Greece. In the social and cultural frame, the majority of articles evaluated the EU positively. While the solutions for irregular migration per se were criticized, the idea of the institution taking action and addressing it was viewed positively. Positive evaluations were also evident in articles on social legislation or tolerance towards diversity and multiculturalism.

Figure 85. Evaluation of the EU and its actors according to thematic frames



Similarly to the EU dataset, all three outlets relied heavily on local sources for their articles regarding Europe. In fact, as with the EU dataset, *La Jornada* was the outlet that relied the most on international sources (but less than 32 per cent of the Europe articles); the other two outlets only used international sources in less than 12 per cent of their articles. The vast majority of articles mentioning the EU came from local correspondents. Ultimately, similarly to the EU dataset, international news agencies like Reuters, AP, and AFP are the most used international sources for articles mentioning Europe. Social and cultural news dominated Europe's reportage in the two popular papers, in contrast to the business paper that prioritised economic portrayals of Europe (Figure 86).

Figure 86. Thematic distribution (Europe news)



There were contrasting differences between EU and Europe in regards to overall evaluation. Since most of the articles only mentioned Europe in a minor degree, evaluation was significantly neutral. Moreover, in line with the lack of observable trends because of the lack of depth about Europe in the majority of articles, it was difficult to observe which events created specific negative evaluations as a whole. Some of the frames did present several negative evaluations in sub-sub frame level.

A contrasting difference between the EU and Europe's evaluation was the negative articles under the Normative frame. The negative evaluations came from articles in which Europe was criticized from a normative standpoint (human rights) because its treatment of migrants. Another frame that presented a contrast with the EU dataset was environment. While the EU was not evaluated negatively on environment, Europe was.

Turning to the *opinion* survey, the evaluation of the EU in Mexico correlated as follows. The EU was viewed most similarly to the World Bank and the World Trade Organisation, and to the US, and to a lesser extent, Japan. The EU's relationship with Mexico was perceived to be relatively good (lagging behind the US and Japan, and similar to China and Brazil). Interestingly, respondents saw their country's relations with the EU, Japan, India and Russia less positively than when asked to express their general view. While as concerns the US, China and Brazil, respondents felt equally positive about the country in general and in terms of its relation with Mexico specifically. This may signal the presence of some local issues resonating and lessening the positive perception of the EU in Mexico.

The EU was most commonly described as *multicultural* and *modern*; and least often described as *hypocritical*, *aggressive* or *arrogant*. This is in line with the positive general view of the EU as well as mostly positive assessment of Mexico's relationship with the EU. In comparison to other countries, both the EU and the US were most often described as *multicultural*; Japan and the EU led in the use of the adjective *united* and *trustworthy*; and the EU was least often described as *hypocritical* and *aggressive* compared to most of the selected countries. Respondents with mostly positive attitudes towards the EU accounted for approximately 58 per cent of the population (and 18 per cent had mostly very_positive),

while those with negative attitudes towards the EU constitute approximately 19 per cent of the population.

Attitudes towards different Member States of the EU also help to get an insight into what makes up the perception of the EU. In Mexico, France, Italy, Spain and Germany were seen as the most attractive Member States. Overall, Central and East European countries were least often mentioned as the most attractive.

What did the 17 *elite* interviews reveal about local resonance? The EU as an example came through clearly. Among the most striking comments were: 'European States are references of a development states, with full respect for the rule of law' (think tank). Or as expressed by a graduate student: 'as region, our many failed integration attempts are inspired in the European integration process which remains as the most concrete. I think the theme 'United in Diversity', should be reflected in the reality of Latin America. At least there is the intention and there we are, in not losing diversity while seeking integration.'

Conversely, some interviewees painted a more modest picture: 'actually I do not believe that the programmes or initiatives from the EU are discussed in public. I really believe that this is one of the major obstacles for the knowledge and perception of the EU in our country.' (Youth/ Business Manager): 'but really, I'm not aware of what the EU does in Mexico to give a more informed response' (Youth, Master's student): 'the Chinese and the North Americans are more active, effective and visible in Mexico' (Business, Managing Director): and, 'I think they are active but not visible. In our country the Americans are more perceived' (Civil society, Union Leader).

The experts were also vocal about the local impact of EU standards and effectiveness:

- 'The European standards are very important, as long as there is an application of these standards, with consequences if you do not comply them, and the opposite when you comply there are positive consequences.' (Academia and think tank)
- 'There must be greater coordination between Mexican and European institutions to monitor the agreements and do not leave them in a declarative level. So far it has been effective but it needs to be more active.' (Policymaker, Senator)
- 'Effective in the sense of results and efficient in the sense of implementation of the programmes, they are very serious about supervision and monitoring of programmes developed in Mexico and therefore very demanding.' (Media, Chief Executive Director)

Economy and trade

The second most visible EU *media* frame was economy (around 15 per cent in both *El Universal* and *La Jornada*, and around 60 per cent in *El Financiero*). Most of the articles dealt with issues regarding the State of the Economy (mainly the Greek crisis) or Trade (EU/ Mexico Cooperation Agreement the leading topic).

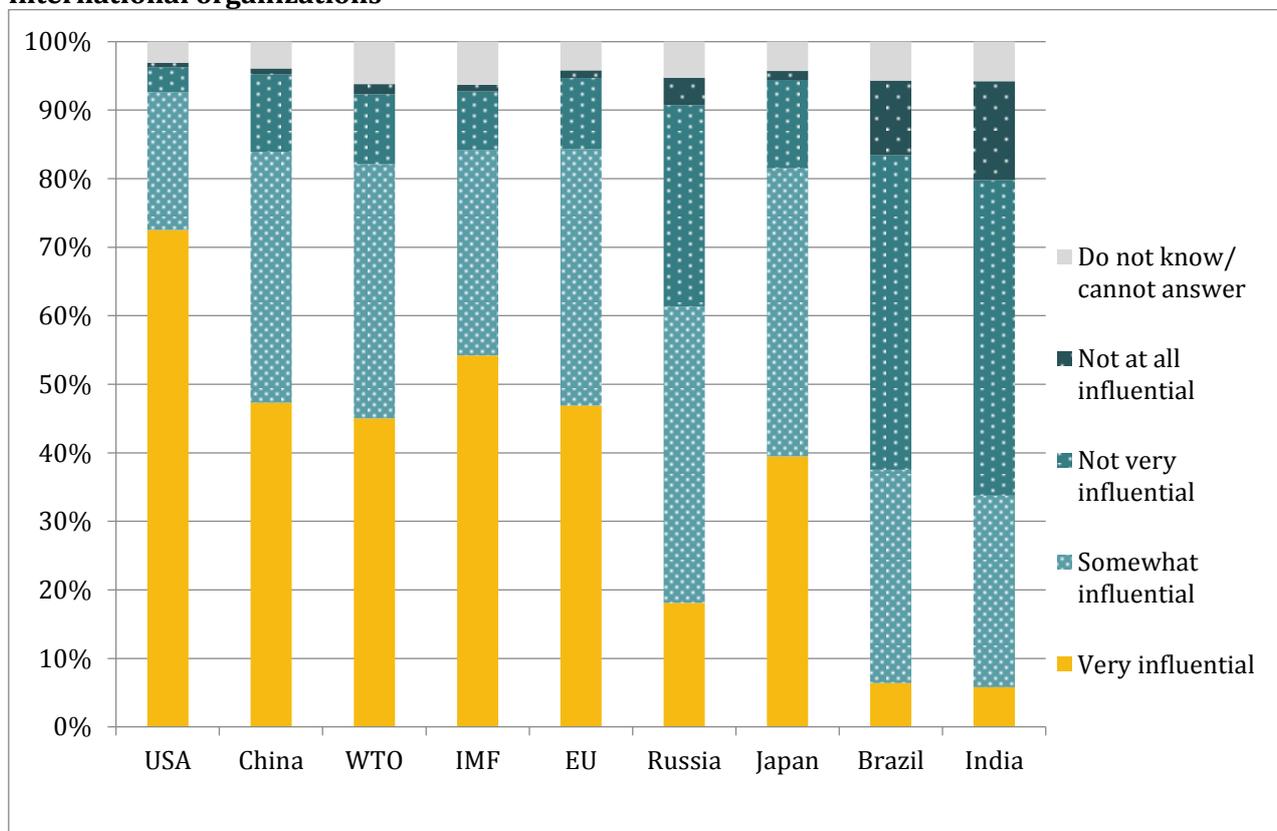
The most visible 'Europe' frame was not politics (which ranked third) but the economy (representing the majority in *El Financiero* and *El Universal*). Economy was the most visible frame in the Europe dataset because Europe was widely used as a geographical reference point for economic activity. It is common to observe articles in which Europe is only mentioned as a destination for Mexican exports or as a place in which business was

developing. In terms of the Economy frame, Business and Finance was the most visible sub-frame, different from the EU dataset. However, the Greek crisis continued to be the most important issue discussed in the Europe articles.

The Euro was the most visible among the items describing the EU. While the European Parliament was the most visible institution of the EU, it was followed closely by the European Central Bank, which is consistent with the EU being often associated with politics and the economy. Other EU institutions lagged behind in visibility. The EU was among the global players Mexican respondents saw as most influential. However, in this respect it lagged behind the US. When compared with organisations, respondents saw the EU's influence similarly to, though slightly below that of the IMF and WTO.

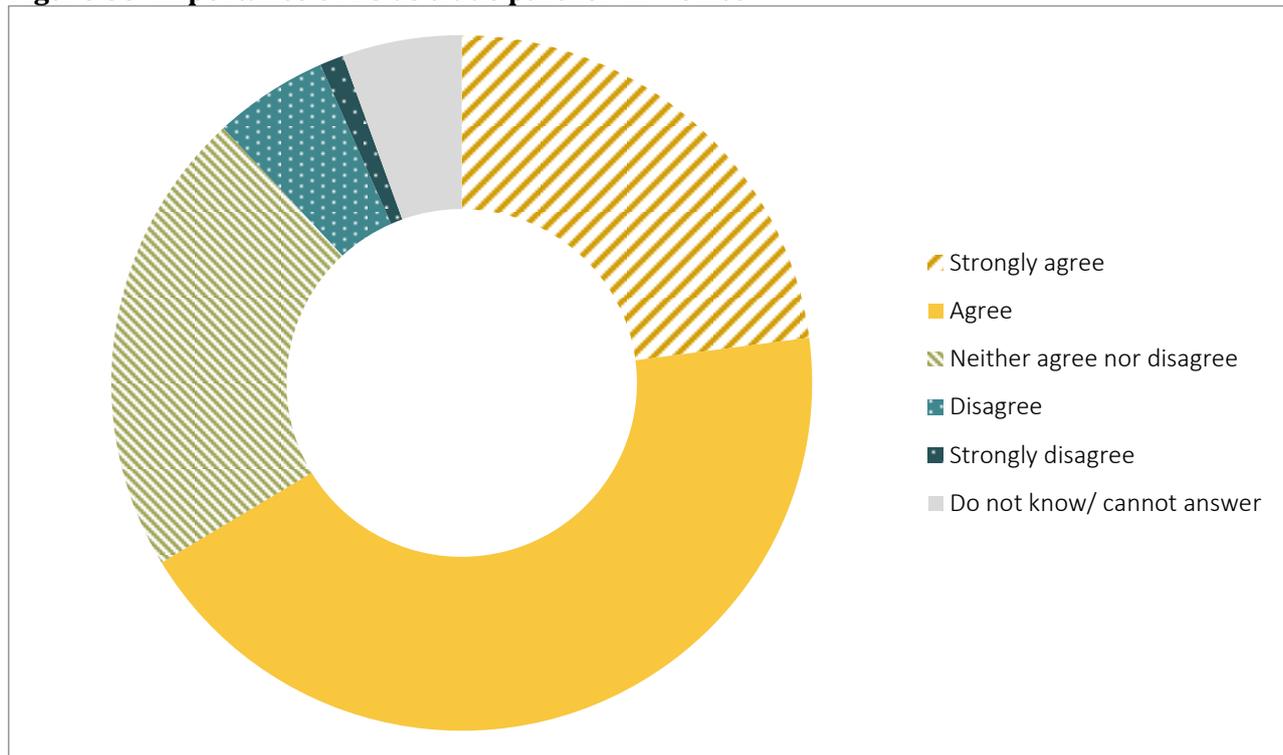
The Mexican *public* considered the EU to be performing well in global trade. In global economic affairs, when compared with other actors, respondents saw the EU as less influential than the US and the IMF, with influence being similar to that of China (Figure 87). Besides, respondents agreed that the EU was an important trade partner (see Figure 88) and foreign investor in Mexico and saw the EU as important and trustworthy partner for Mexico in international relations. As for tourism, in Mexico, respondents saw it as the economic field in which the EU performed best, followed closely by global trade. Mexican respondents generally saw Europe as an attractive tourist destination both as relating personally to them and to Mexican tourists in general.

Figure 87. EU's influence in global economic affairs compared with countries and other international organizations



Note: Based on the answers to survey Q6: In your view, how influential in global economic affairs are the following countries and organizations? (N = 1164)

Figure 88. Importance of EU as trade partner in Mexico



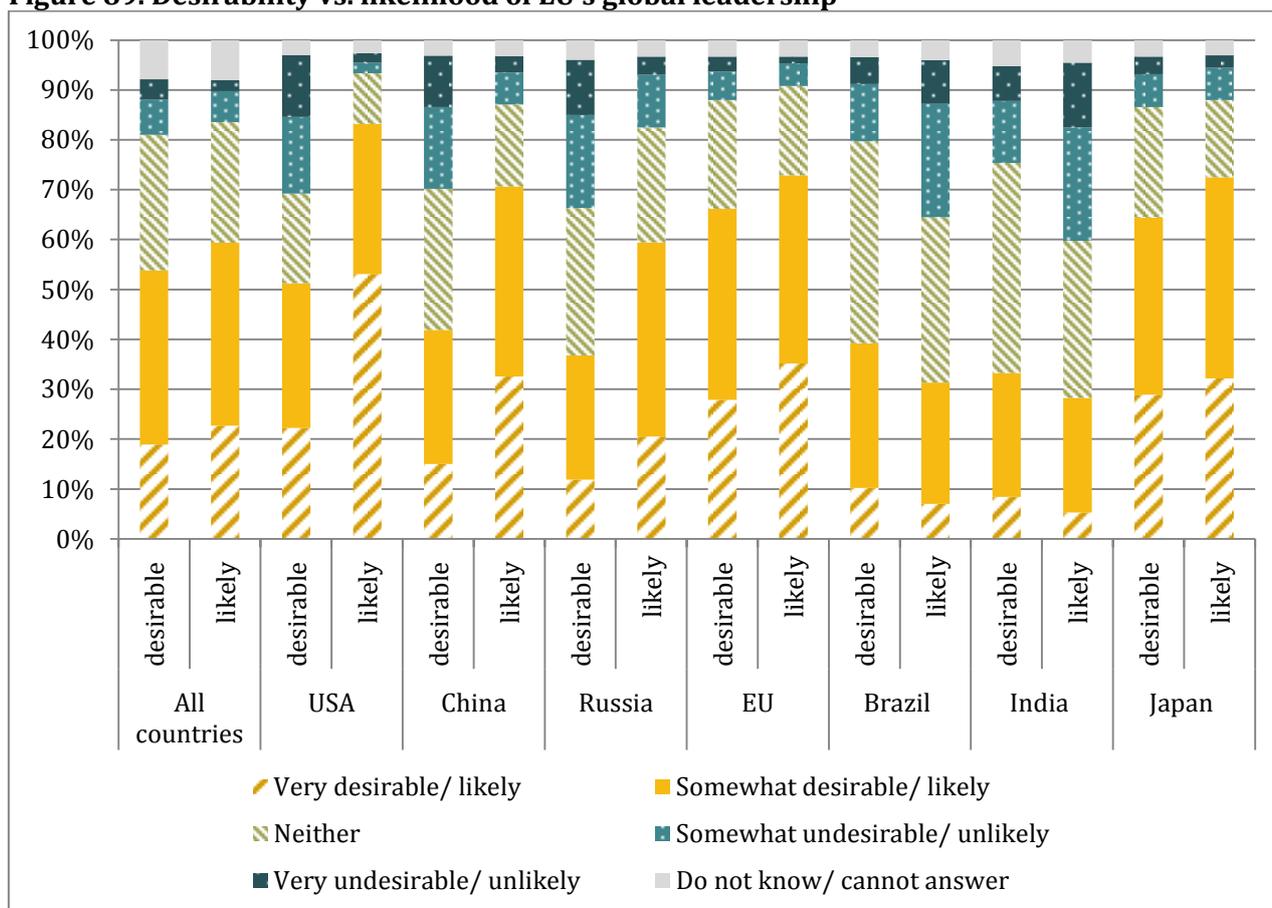
Note: Based on the answers to survey Q14: Looking from Mexico’s perspective, how strongly do you agree or disagree with each of the following statements about the economic relations with the European Union? The European Union is an important trade partner with Mexico (N = 1164)

The *elite* interviewees suggested high visibility across a range of economic fields: investment, trade, Industry, global competitiveness, the promotion of Mexican SMEs, and FDI programmes were mentioned. Effect was also noted: ‘yes it impacts. Everything done by great actors such as the EU impacts in Mexico and in the rest of the world; they have a great international presence. In terms of investment, for example, they have strength.’ (Augustin Civil society, Union Leader).

Politics and security

The EU’s leadership in world affairs was seen as desirable by the *general public*. The EU led the countries used for comparison in terms of overall desirability of its leadership, followed closely by Japan (see Figure 89). The EU lagged behind only the US in terms of how respondents gauged the likelihood that it would take a strong leadership role in the future, closely followed by Japan. In Mexico, most respondents saw the US to be a major player in world affairs in the future. All other countries used for comparison were lagging behind the EU in terms of how desirable or likely respondents thought them to take a leadership role in world affairs.

Figure 89. Desirability vs. likelihood of EU's global leadership



Note: Based on the answers to survey Q4: How desirable is it that each of the following countries and organisations take a strong leadership role in world affairs; and Q5: How likely or unlikely is it that each of the following countries or organisations will take a strong leadership role in world affairs five years from now? (N = 1164)

In terms of Mexico's general public opinion towards the EU's performance in global peace and stability, the EU ranked behind only the UN. In Mexico the EU's performance was seen as similar, though slightly above that of the US. Looking more specifically, the EU's performance in peacekeeping operations was regarded slightly more positively than other fields related to peace and stability, namely military operations or the fight against terrorism.

For the EU dataset the *media* analysis found that *El Universal* and *La Jornada* focused mainly on politics (in excess of 65 per cent of their EU news), particularly external politics, while *El Financiero* focused mainly on economy (around 60 per cent). There was very low coverage of any other frames (less than 20 per cent in *El Universal* and *La Jornada*, and less than 10 per cent in *El Financiero*).

Development (social internal and international)

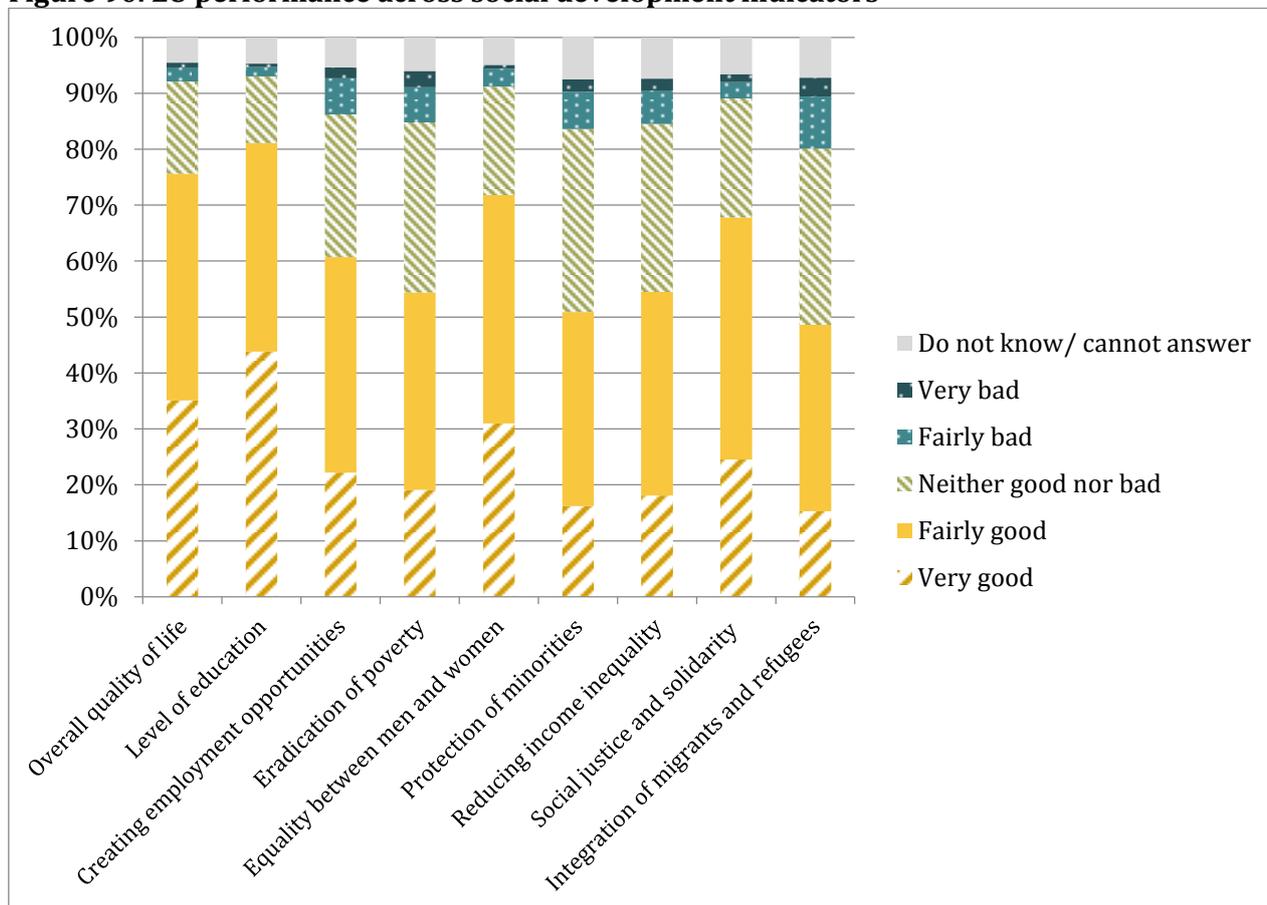
Despite a pronounced interest in normative questions including human rights, the Mexican *media* rarely covered EU development news, other than for articles about aid for the Nepal earthquake.

Public opinion was not quite as disinterested: in terms of support for development respondents considered the EU as a key actor, more important than the US and other

countries used for comparison. As concerns organisations, the EU appeared below only the UN and ranked similarly albeit higher than the World Bank.

In terms of public opinion on **internal social development**, Mexican respondents saw the EU as performing well in social justice and solidarity (e.g. social rights, the public welfare system) and evaluated the EU's performance in the level of education, gender equality and the overall quality of life as the most positive areas of social development (Figure 90).

Figure 90. EU performance across social development indicators



Note: Based on the answers to survey Q17: Generally speaking, how well do you think the European Union performs in each of the following areas of social development? (N = 1164)

A youth interviewee seemed unconvinced of the utility of EU development initiatives. ‘There is no real impact, the EU promotes and it is pioneer in many sectors such as development, environment, and energy. Maybe other regions of the world are not very focused and it’s good to see the EU being the pioneer in these themes but beyond that there is no greater impact in our country or in the world... despite being positive, I believe there is no real application because there is insufficient and ineffective knowledge to implement these programmes and initiatives’ (Youth/ Business Manager).

Migration, multiculturalism and human rights

Mexico’s *public opinion* survey respondents saw the EU’s performance in the field of promoting and defending human rights worldwide very similarly to how it fares in social development, with main rivals in these areas being the UN and the US. In this field

respondents saw the UN as the most important actor. The EU in this respect is seen as more important than all other countries, followed by the US and Japan.

The survey also contained several questions on more specific human rights issues. Results showed that in Mexico the EU's dealing with refugees (and displaced people) was seen as less positive when compared to the overall fairly positive evaluation of the EU's performance in other fields. This area clearly stands out as the one that respondents least often evaluated positively. The EU's performance in integration of migrants and refugees was also seen least positively among other areas of social development. For comparison, respondents evaluated the EU's performance in gender equality as the most positive among other human rights-related issues listed in this survey question.

As noted in the *elite's* general normative comments, the EU was used as a benchmark. 'The citizen in Mexico and other Latin American countries has no security and respect for human rights, something we have to search with other international actors.' (Media, presenter and analyst.) 'The best way to measure the impact is with all the recommendations that it [EU] has done at different times on violation of human rights; especially those related with enforced disappearances and the murders and violation to freedom of speech. Those recommendations impact positively in Mexico.' (Policymaker, Senator.). A range of dialogues with civil society were also noted, including women's empowerment.

Environment and energy

Articles about the EU environment frame were equal in terms of internal or external focus, and they covered issues like EU use of pesticides or recycling (internal) and the Climate Change Summit (external). In the limited EU energy articles the topic was primarily about ethanol and renewables. A similar balance was evident in the Europe dataset (6 articles) with the topics more likely to be carbon emissions, CO2 storage, or global warming. There were only two Energy articles which discussed the effects of the Iran negotiations on energy and ethanol.

The EU's role in fighting global climate change and protecting the environment was seen by the *public* similar to its role in maintaining global peace and stability. For Mexico's respondents, the EU led among countries in this respect; however it was behind the UN. In Mexico, protection of the environment and the fight against climate change was not among the fields in which the EU was seen as standing out the most. Mexicans saw the EU's performance in green technologies similar to that in other economic activities and other specific fields of technological development.

The interviewees generated a wide range of environmental and energy commentary. Topics raised included respect for the environment, global warming, climate sustainable local development, sustainability and clean energy development.

Research, science and technology

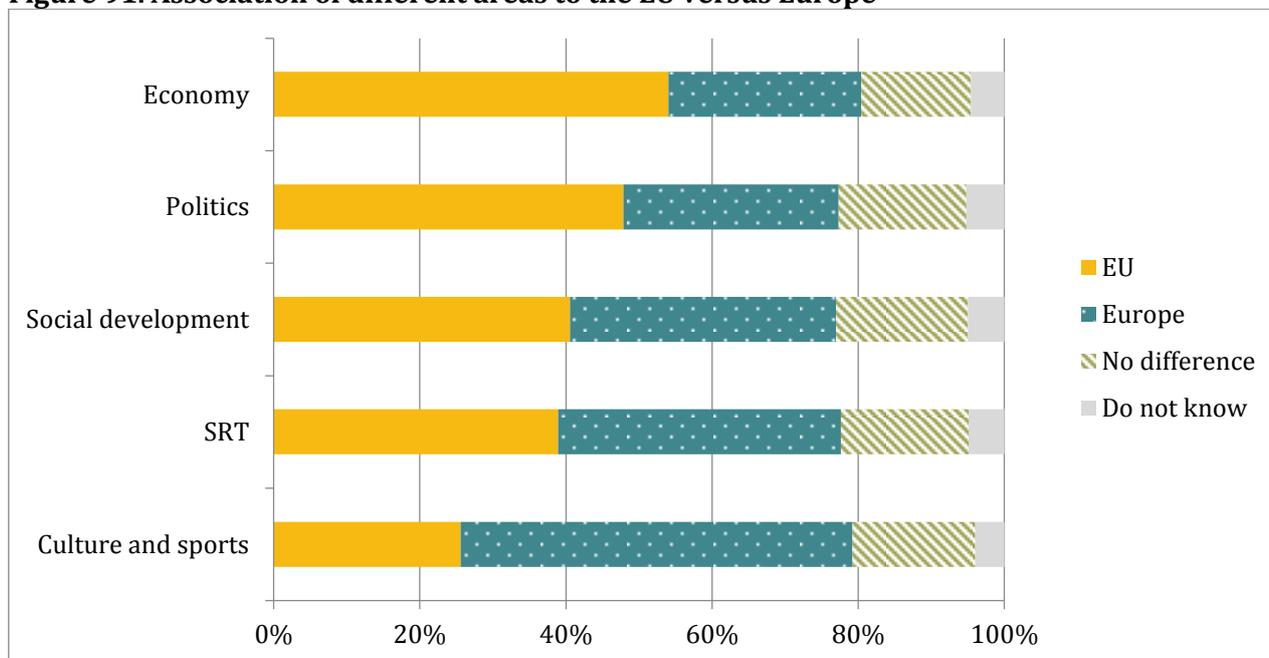
Again, there were only a handful of articles in this EU and Europe field; examples include robotic tournaments in Europe, cancer research, and a satellite launch. Public opinion did exit, however. In the field of innovation and technologies Mexican respondents saw the EU as lagging behind Japan, the US and China. Mexican respondents viewed the EU's importance in innovation and technological progress similarly to that in other areas. Despite the overall

reserved view on the EU’s global importance in this field, respondents felt the EU performed well in science and research and various fields of technology. The interviewees drew attention to some of the better-known RS&T programmes.

Culture

When compared to other countries, in Mexico EU Member States were seen by the *general public* as particularly attractive for their culture and lifestyle, followed most closely by Japan. Even though respondents evaluated all areas related to EU culture very positively, they were more likely to choose arts, lifestyle, sports and historical heritage over food and cuisine, music, cinema and theatre. These opinions are in line with those on the EU’s performance in the entertainment industry, which was evaluated less positively compared to other economic activities. In relation to other questions, respondents also tended to agree less often with the statement that Europe is a producer of music and arts popular in Mexico. The acquisition of French language and culture was one of the elite comments recorded. Lastly, respondents from Mexico associated culture and sports first and foremost with the term Europe (53.6 per cent) rather than the EU (25.6 per cent) (see Figure 91).

Figure 91. Association of different areas to the EU versus Europe



Note: Based on the answers to Q23: 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 = 1410)

Education

The *public* acknowledged the importance of the EU in educational exchanges, even though at the same time an increased share of respondents chose not to answer these questions perhaps suggesting a somewhat lower visibility of the EU in those specific areas. Consequently, the Erasmus programme was the least visible of the images describing the EU listed in this survey question.

Mexican respondents viewed the EU positively in terms of the level of education of its population, which was seen as the area of social development where the EU performed best.

The EU was also seen as an important partner for Mexico's educational exchanges. One media interviewee underlined the important role that the EU could play: 'in the case of academic cooperation I think it is also a strategic issue promoting the internationalization of higher education in Mexico, the academic mobility of students and teachers and the European institutions of higher education through support of EU's specific institutional programmes, I think there are many projects and programmes that are highly attractive to my country (Media, Chief Executive Director).

The EU as a norm-setter

The common theme in the Mexican dataset (for media, elites and the public) was the profile given to normative issues and the use of the EU as a positive example for the country. Normative articles focused mainly on good governance, rule of law, and human rights.

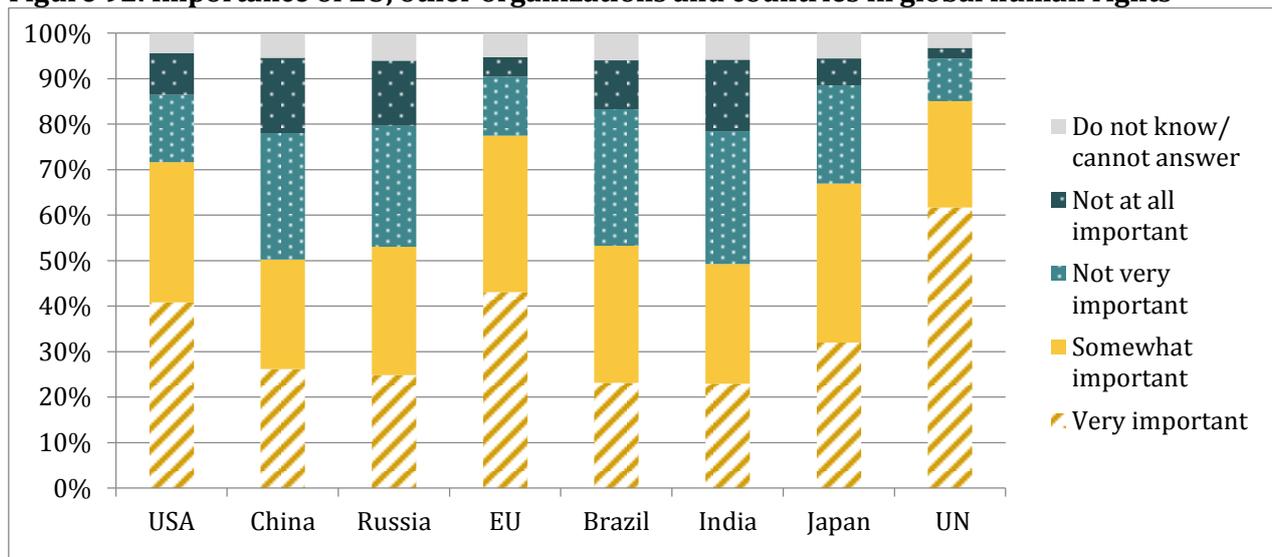
It is interesting that in Mexico, the normative frame is more visible than in other countries' *media* (in both the EU and Europe datasets). This particularity responds to the role of the EU as a normative point of reference for Mexico. Mexican civil society reaches out to the EU to denounce and condemn the actions of the national government in terms of human rights. There is an important normative theme in EU articles dealing with Mexico; for example, the case of the 'normalistas de Ayotzinapa,' concerning 43 assassinated students. Mexican civil groups tied to the families of the victims rallied in Europe and sought help from the EU institutions in their fight for human rights. Moreover, the role of good governance in the negotiations to renew the Cooperation Agreement between Mexico and the EU was very visible.

In contrast with the EU dataset, Europe articles gave significant coverage to social and cultural affairs news. Social and cultural articles represented 35 per cent of *El Universal's* Europe articles, while for *La Jornada* the figure was 45 per cent, which made it the most visible frame for this newspaper. *El Financiero* had just 10 per cent of its Europe articles fall into the social and cultural frame (compared with just five per cent in the EU dataset). The social and cultural articles that mention Europe follow the trend explained before of using Europe as a reference point that is mentioned only once or twice. In this regard, the most visible articles were those about crime, specifically drug trafficking that either transits through Europe, or had Europe as its final destination.

Again, the interviewees were vocal in their discussion and examples of the EU's normative impact and human rights agenda. 'In terms of promoting democracy and human rights ... who is going to be against that? At some point they have been a reference of democratic systems and respect of human rights. Although today in the middle of the crisis, the democratic rules remain quite strong.' (think tank, project director.) 'Both are in favour of democracy, human rights, in Mexico this issue implies a huge task. I think there is affinity of values' (academia, Professor).

Lastly, respondents from Mexico saw the EU as one of the most important actors in terms of promoting human rights worldwide, trailing only to the UN in this regard (Figure 92).

Figure 92. Importance of EU, other organizations and countries in global human rights



Note: Based on the answers to survey Q10: In your view, how important a role do each of the following countries or organisations play in in promoting and defending human rights worldwide to protect human dignity, freedom, equality and solidarity? (N = 1164)

3.6.4 Local conditions: explaining the perception of the EU in Mexico

Perceptions are a result of interactions between internal (Mexico-specific) and external (EU-specific and global) factors. There are several possible explanations for the profile of EU images and perceptions in Mexico. Drawing on the EU media analysis, what evaluations can be drawn? All three outlets present more positive/ between positive and neutral articles than negative/ between neutral and negative articles.

Explanations drawing on Mexico's perspective on international relations could also be drawn. It is argued that the Mexican political elite are engrossed in localism and parochialism. Thus international issues are largely not relevant. The public in Mexico still question what the benefits of foreign policy are and unless it does not affect their ordinary life, they seem really not to care. The Mexican population is primarily engaged in issues that concern everyday life, such as organised crime. Additionally, there remains a colonial shadow - in some cases, the population see Europeans as colonizers. Furthermore, language can be seen as an obstacle (making the strongest relationship with Spain, because of language). The elephant in the room is of course the USA and culturally Mexico is locked in its relations with the United States.

If we look to culture to offer an explanation the following arguments were evident. In a positive sense Mexicans and Europeans can be seen as very similar culturally (both sharing western values) and that allows an openness towards the EU. Relations have grown historically and positively. More problematically, Mexican culture is focused on the United States and the Pacific and interest in Europe is less pervasive. Here, the important role that can be played by education should be noted: it allows cultural exchange and rapprochement particularly through language acquisition (English, French and other European languages). It has to be acknowledged too, that part of Mexico's culture includes the negative elements of corruption, a lack of democratic commitment and an authoritarian and illegal culture.

3.6.5 Recommendations for EU Public Diplomacy

Five main recommendations can be identified. First, a large number of federal government secretariats and local governments have opened external relations sections or offices. From education to environment, the federal government has expanded sectorial collaboration with foreign governments and international organisations. At the state level, Mexico, Oaxaca and Jalisco, among others, have opened offices focusing on developing external relations. Also, some cities have developed policies and programmes oriented to enhance cooperation; particularly important is the Mexico City External Relations Office, but also similar offices in other cities or large municipalities such as Cancun or Acapulco are quite sensitive and willing to understand European issues in light of the large number of European tourists. Clearly the EU needs to respond to this growing multiplicity of contacts and networks.

Second, in the area of legislative politics, a PD priority should be the Commissions of External Relations of the Mexican Senate and of the Chamber of Deputies. Also, a significant partner of PD should include think tanks that most of the political parties have created to provide them with policy papers and positions on international relations. PD should also contemplate the coordination of activities with European foundations currently working with political parties and NGOs in Mexico (Friedrich Ebert or Konrad Adenauer, for instance).

Third, PD has found in Mexican NGOs active partners, particularly in areas where the EU is financing programmes. Based on the changing priorities of the Mexican society, the area of activity of NGOs has evolved and hence the potential cooperation should be adapted. Rule of law, reduction of criminal activity and corruption, and inclusiveness are three potential targeted areas where public diplomacy should find active NGOs as potential partners (see CASEDE Collective for Security Analysis with Democracy).

Fourth, opinion makers in all varieties of media are also significant PD partners. While the presence of Televisa and TV Azteca is dominant in Mexican media and both networks should continue in the priority list of PD, it is pertinent to reach out to a larger audience that consumes information from morning, noon and early night radio shows in other networks (Multivision or Canal 22, for instance) or from online media, particularly from newspapers that have launched 24-hours online TV news services (Milenio and El Financiero).

Fifth, PD should also continue working with the academic target group. At the professional level, the Mexican Council on Foreign Relations (COMEXI) and the Mexican International Studies Association (AMEI) are natural interlocutors of the EU's PD. On the other hand, the study of the European Union has exponentially grown in Mexico due to the fact that a large number of academic institutions offer BA degrees in International Relations, not only in Mexico City, but also in other cities such as Guadalajara, Monterrey, Tijuana or Chetumal. Youth studying in these programmes have particular interest in developing first hand contact with European diplomats.

Several additional lower order recommendations were also made. There is a danger that any relaunching of relations between Mexico and the EU will be merely rhetorical. Europe needs to pay the necessary attention to Latin America. There is no public debate around the EU programmes or initiatives. They are only discussed in specific sectors, such as academy, business, the Ministry of Foreign Affairs and among policy-makers. The audience needs to be widened. Build on the perception that the concept of Europe is, generally, attractive for

Latin-Americans (European way of life). The EU is a strong economic and trading bloc. However, the crisis has forced a downgrading of the EU's political role. Rebuilding a better balanced perception is required. The presumed disaffection inside Europe towards the European project needs to be countered. The EU and its programmes are considered as active and effective but not visible. The EU is widely regarded as a promoter of values and rules such as security, peace keeping, democracy, freedom of speech and human rights. These normative themes resonate strongly among the Mexican public and elites and serve as a basis for better targeted Public Diplomacy.

The business sector perceives the EU as an essential partner. The most visible connection is with Spanish companies and banks such as OHL, Santander and BBVA. Special groups are quite informed about EU (business groups, trade unions, academia and political parties); the general public is poorly informed. The EU should invest more in promoting its programmes and bring them to Mexican society to know them and use them. In the Survey of Public Opinion and Foreign Policy elaborated by the CIDE (Centro de Investigación y Docencia Económica), there are clear questions about the partners of Mexico and the EU does not appear as such. Many single countries appear thereby diluting the EU image. Indeed, the visible image of the EU is Brussels and its institutions, but culturally the images are displayed by country (France = Eiffel Tower, London = Big Ben, etc.).

More critical visions pointing to obstacles and gaps in the EU's Public Diplomacy in Mexico were also highlighted in the interviews. An important negative perception that has to be addressed is Mexico's feeling of exclusion and resentment because of the TTIP negotiation between the EU and US. Similarly, the Global Agreement must be re-functionalised to reaffirm the commitment on economic matters. There is a feeling that, on both sides, the relations are merely discursive and may become less relevant if both parties do not upgrade the Global Agreement and make it compatible with the potential effects of the TTIP. Thus after a renegotiation of the Mexico-EU Association, perceptions around Europe can change for the better, but only if the agreement is tangible and strong. It must be promoted among the general public to show all the opportunities that Europe could bring.

The challenge for the EU is to redefine its position in global geopolitics, ahead of the United States, which is trying to maintain their global leadership; Russia with its geopolitical repositioning in Asia and its world power ambitions; and China as the great economic giant. The distance and language could be obstacles. The first one, because the cost of trade to Europe is more expensive than the cost of trade to the United States; the second, because the relationship is limited to Spain, because of language. More cultural promotion for people is needed to understand the EU as a bloc and to stop constantly thinking in terms of individual countries.

Recommendations for EU Public Diplomacy from practitioners on the ground in Mexico

From the perspective of practitioners at the EU Delegation on the ground there are three key concerns for PD outreach in Mexico: A clear, comprehensive PD Strategy needs to be developed to produce clear-cut key messages the EU Delegations can transport in a tailor-made, country-specific and target group oriented approach. Member States with a long experience in PD should be encouraged to share their experiences and best practices. Furthermore, an adequate platform and institutionalised processes for sharing these best practices should be established. When attempting to sell the EU (not just Europe or

individual Member States) via cultural diplomacy, stronger incentives (such as Europe-Trips as prizes for competitions) must be provided and included into the budget. Financial resources should be designed to be more flexible in order to avoid time-consuming bureaucracy and to respond quickly to events and arising necessities.

3.7 Russia

This Country Chapter presents a synthesis of the Russia-specific findings of media analysis; elite interviews 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 Russia according to the research criteria applied – namely visibility; actorness and local resonance; and norm-setter. Moreover, in the section on actorness and local resonance, we discuss these according to the themes analysed in this research: economy and trade; politics and security; normative and human rights; development – including the social internal and international dimensions; migration, multiculturalism and human rights; environment and energy; science, research and technology; culture; and education. The final section before policy recommendations looks at the local conditions that explain the perception of the EU in Russia. Finally, we conclude the chapter with recommendations for Public Diplomacy, including a subsection on recommendations in the eyes of practitioners based at the EU Delegation to Moscow.

3.7.1 Sample

Public opinion

The online omnibus survey was coordinated and analysed by the Public Policy and Management Institute (PPMI) and conducted by TNS Global. The respondents in Russia were surveyed in Russian. Data collection took place in August 2015. The online omnibus survey was designed to be nationally representative with regards to age, gender and region. The survey covered a total sample of 1,321 individuals within the 16-64 age group

Media

The media content analysis was designed, supervised and coordinated by the National Centre for Research on Europe (NCRE), University of Canterbury, New Zealand, and conducted by local researchers trained by the NCRE. Two prestigious newspapers *Kommersant* and *Rossiyskaya Gazeta* that are seen as influential among country's policy- and decision-makers and a business daily *Vedomosti* were monitored daily between April 1 – June 30, 2015 using e-search engine Press Display to ensure high accuracy in data collection. Importantly, *Rossiyskaya Gazeta* is an official newspaper of the Russian Government; *Kommersant* was formerly independent, yet was put under 'soft' censorship of the owner in 2012; and *Vedomosti* is still considered independent. Two separate datasets were collected over the period of observation – 'EU' (509 articles) and 'Europe' (668 articles). Key search terms for dataset 'EU' included (with acronyms) 'The European Union', 'The European Commission', 'European Parliament', 'European Court of Justice', 'European Central Bank', 'European Presidency', 'Council of the European Union', 'Eurozone'. The key search terms for dataset 'Europe' were 'Europe' and 'European'.

Elite opinion

The NFG coordinated the interview programme and designed the questionnaires in close coordination with the Country Experts (Levada Center) and the project partners. The NFG was also responsible for the training of the Country Experts and supervision of the implementation of the interviews. The interviews itself were conducted by the Country Experts. Interviews have been conducted as a source to identify upcoming trends and to

cross-check findings. They are non-representative due to their current scope and should be considered as a tool for future evaluations in a representative volume. The NFG chose a three-phased approach: in Phase I, two transcripts were due until June 6; in Phase II, five interviews were due until July 15; and in Phase III, five interviews were due until August 17. The NFG was in charge for the coding of the transcripts and the provision of the results to the project partners.

Interviews in Russia were conducted in Russian and translated and transcribed by PPMI. The Country Experts interviewed 10 experts (Academia/ Think Tank (3), Policy-makers (2), Media (2), Business elites (1), Civil Society (2)) and held one group interview with eight representatives from Business/ Academia with mixed backgrounds (Business Graduate now in management position, one from Moscow State University of Geodesy and Cartography (Geography), one from the Moscow State Institute of International Relations (International relations), two from the Higher School of Economics (Political Science), one from the Higher School of Economics (Philology), one from Sechenov First Moscow State Medical University (Paediatrics), one from the State University of Management (International business)).

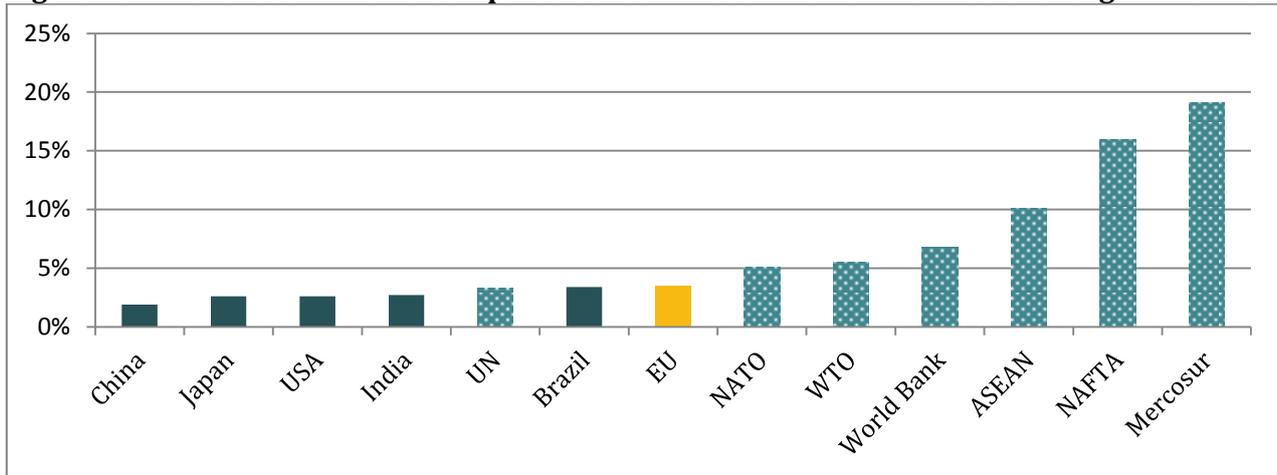
Semi-structured, anonymous qualitative interviews under Chatham House Rules were conducted with all EU Delegations across the 10 Strategic Partner countries, primarily in the form of a group interview. The groups included Heads/ Deputy Heads of Delegations, Heads of Press and Information Section and/ or Heads of Political Affairs Section. Interviews lasted between 60 to 90 minutes. In Russia, one diplomat was interviewed.

NB: two robust datasets collected in the course of public opinion survey and media monitoring allow for quantitative and qualitative analysis of data (for more detailed information, please see attached country-specific media and public opinion reports). Survey of elite opinion is impressionistic due to small numbers of the interviews. Data collected is analysed using qualitative approach.

3.7.2 Visibility

In the eyes of the Russian *public*, the overall visibility of the EU was marginally below that of the countries used for comparison (see Figure 93). For Russian respondents, the UN was more visible than the EU, although the EU was more visible than other international organisations.

Figure 93. Awareness of the EU compared to countries and other international organizations



Note: Based on the answers of option ‘Do not know/ cannot answer’ to survey Q1: Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations? (N = 1321).

Media visibility of the EU was traced in two popular dailies *Kommersant* and *Rossiyskaya Gazeta* and a business daily *Vedomosti*. In three months of observation in 2015, these papers featured a sizable sample that referenced the EU and its institutions (509 articles) and Europe (668 articles). The averages for the 10 country sample were 505 articles in the EU dataset and 635 articles in Europe dataset. Articles reporting the EU tended to be longer articles that often reported the EU with a low degree of centrality and modest visual support (see Figure 94 and Figure 95). However, many of the EU, as well as Europe, articles appeared on the front pages (partially and fully). Also, both EU and Europe news was often found in sections where main local events and actors are discussed and debated. As such, the visibility of the EU could be described as *partial but with local perspective*. The concept of ‘Europe’ was presented with a minor intensity and in longer articles. Such framing suggests limited visibility of the concepts under observation.

Figure 94. Degree of centrality (EU news)

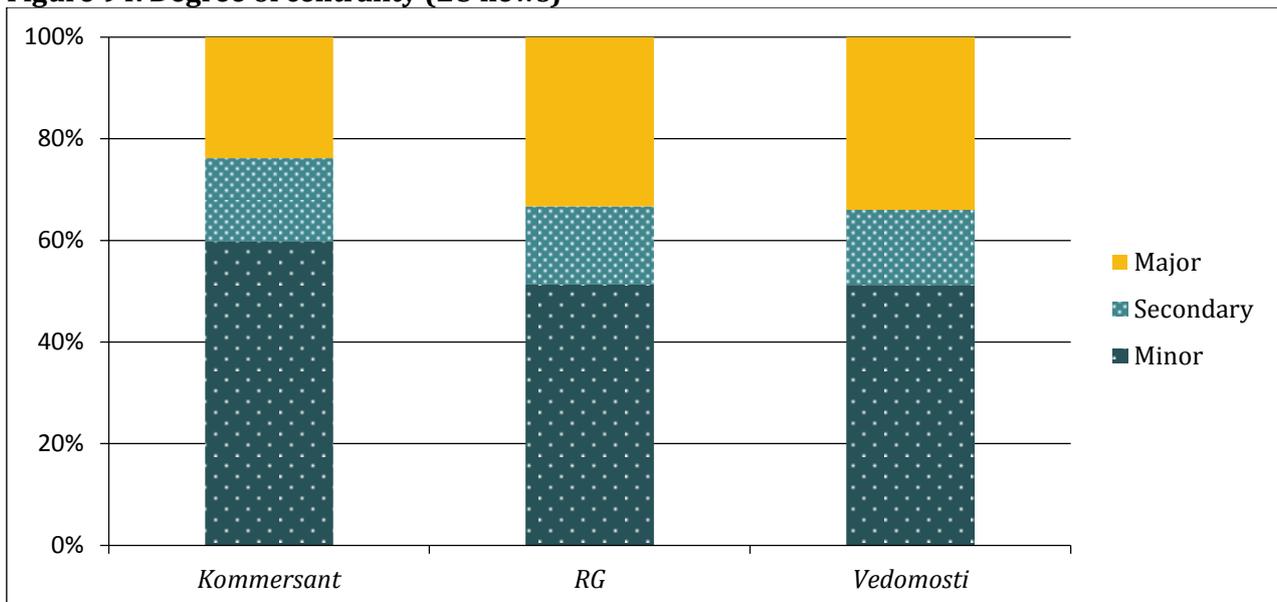
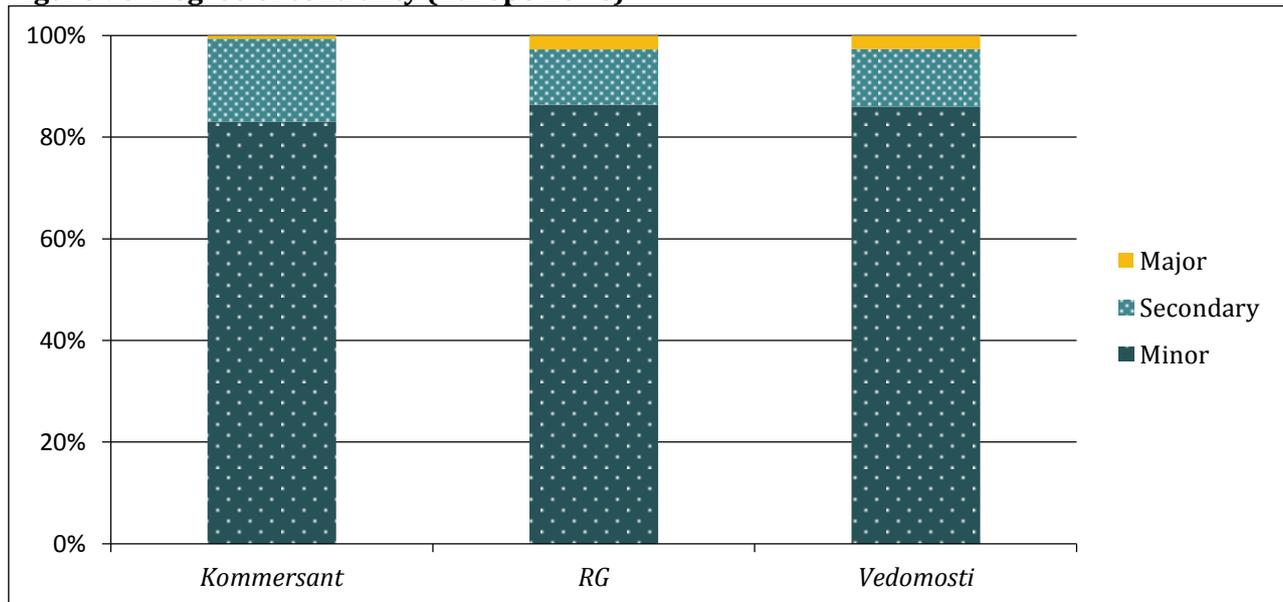
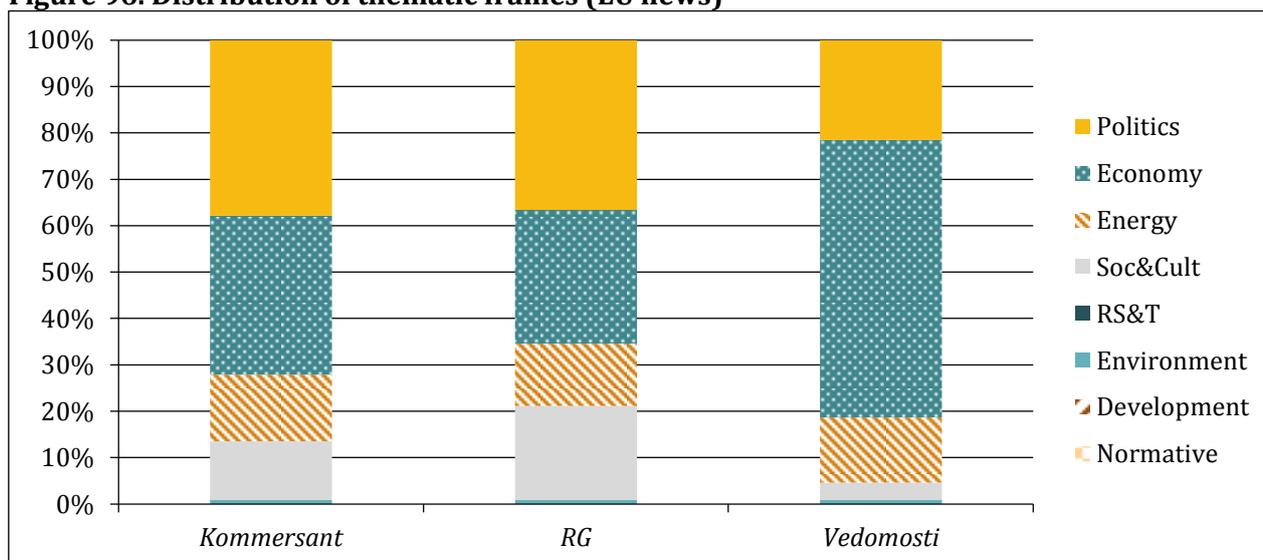


Figure 95. Degree of centrality (Europe news)



The media under observation dedicated much of its daily interest towards Greece and the European Central Bank. Reportage dealt with the complex relations between the Greek government and the EU financial institutions or with concerns about the impact of the Greek bailout on the Eurozone in general and the EU in particular (Figure 96). Yet, it was the European Commission and its President Juncker who were the most visible EU actors. This heightened profile was due to media's focus on the EU's sanctions against Russia. The ECB was the second most visible EU actor, and its visibility was due to the Greek crisis and the Eurozone stimulus policies widely discussed in Russian press. However, the greatest media attention was given not to any EU institution but to Germany, presented by media as the 'locomotive' of the EU. Germany dominated the reporting of EU economic decisions and EU external energy relations. Greece was the second most visible EU member state framed as the main problem for the EU. The UK was extensively discussed in the light of Brexit. The respective leaders of these countries received extensive media attention in the Russian press, with Alexis Tsipras being the most visible EU Member State leader due to his visit to Moscow within the period of observation.

Figure 96. Distribution of thematic frames (EU news)



A small sample of the local *elites* expressed views that suggest that they are well informed on the EU and EU-Russia interactions and are engaged with the EU directly. Their perceptions are detailed below.

3.7.3 Actorness and local resonance

The EU as a partner

The *media* findings clearly demonstrated that a local focus of domesticity stood out in the framing of the EU (see Figure 97). *Kommersant* and *Vedomosti* covered the EU in the local context (e.g. reporting on EU sanctions against Russia, or EU-Russia gas deals), while the *Rossiyskaya Gazeta* covered the EU in the EU context focusing on the irregular migration crisis. Despite this preference, a local ‘hook’ for EU news was still visible in the case of the *Rossiyskaya Gazeta*, a pro-government paper. This extensive local grounding suggests that the EU was presented by the influential news media as a close ‘Other’ able to impact Russia politically and economically and thus directly important. Intensive local ‘hooks’ in the Russian press correlated with almost exclusive use of local news sources for all three papers (Figure 98).

Figure 97. EU News 'with local hook' vs. news without it

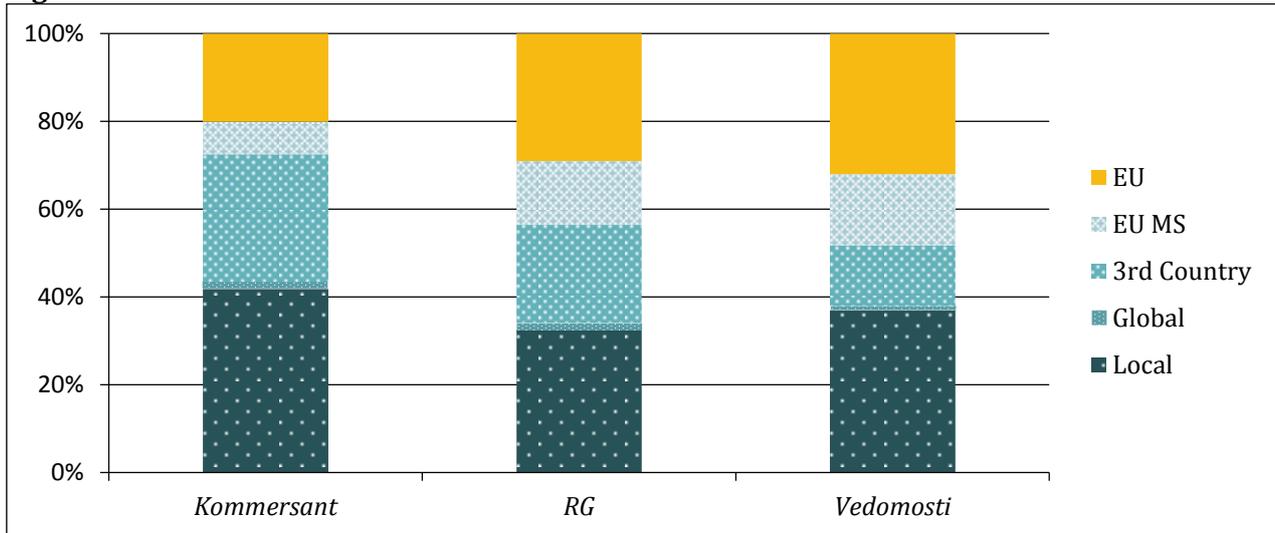
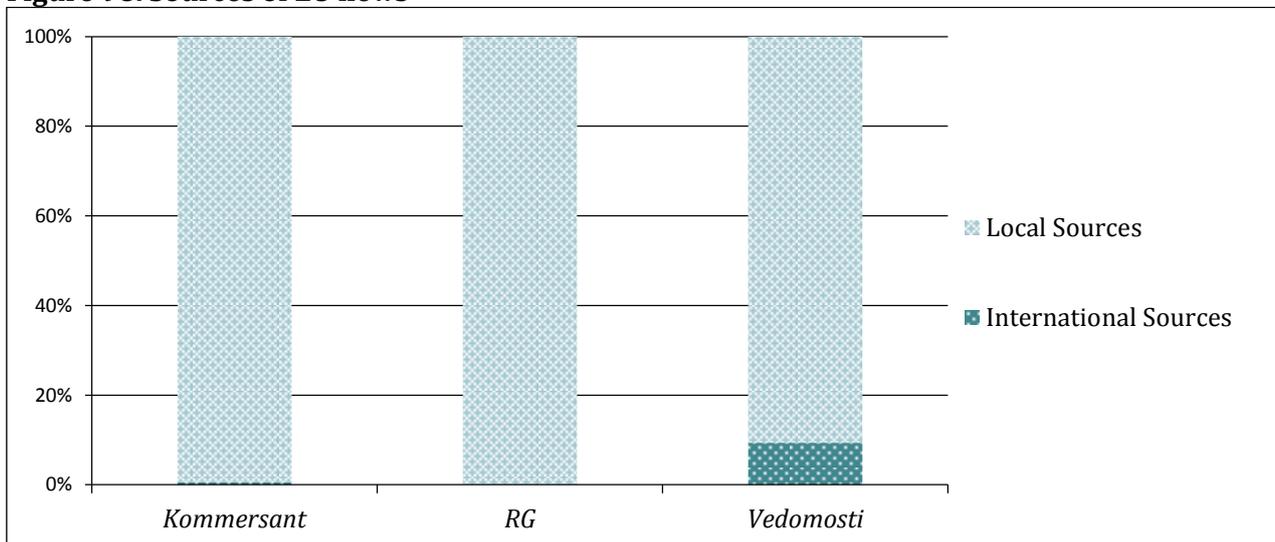
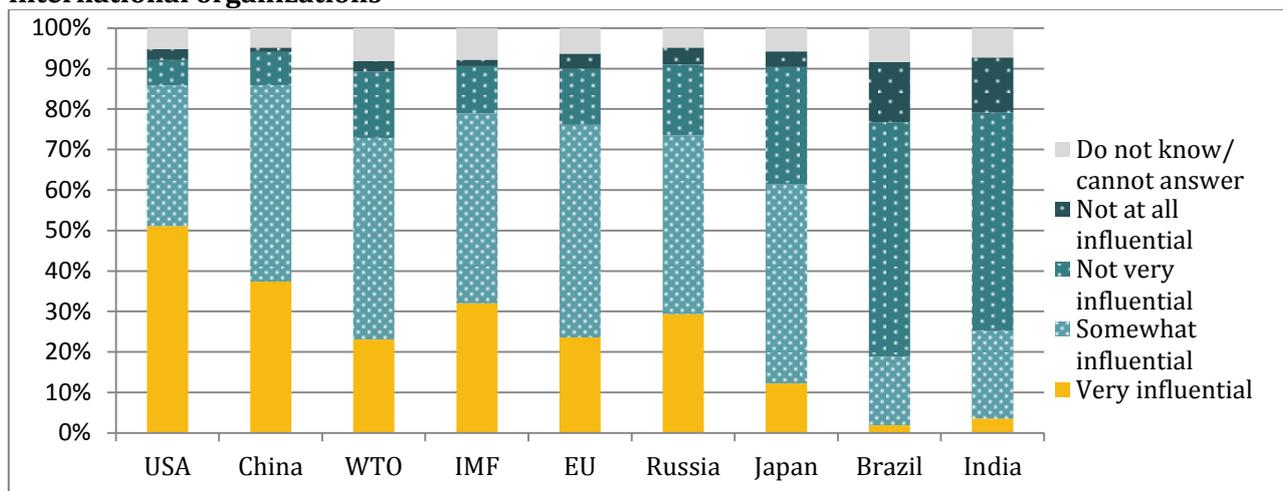


Figure 98. Sources of EU news



Possibly reflecting on the partial media visibility – yet with strong local perspective – Russian *public opinion* revealed that the EU was not recognized among the global economic players as most influential (see Figure 99). In this respect the EU significantly lagged behind the US and was also less acknowledged than China. It was also ranked behind Russia. When compared with organisations, Russian respondents saw the EU’s influence similar to the WTO, but less than that of the IMF. Overall, public opinion on Russia’s relationship with the EU was negative and corresponded with some answers on more specific questions about economic, political and educational relations with the EU discussed below. One difference from the findings for the other countries in the ten-country study was that a negative correlation between evaluations of the EU and/ or the US vis-à-vis Russia was found, indicating that the EU and the US were consistently evaluated the *opposite* of Russia.

Figure 99. EU's influence in global economic affairs compared with countries and other international organizations



Note: Based on the answers to survey Q6: In your view, how influential in global economic affairs are the following countries and organizations? (N= 1321)

A small group of Russian *elites* approached for this project agreed that the countries of Europe and the EU are seen as active players in the public space of Russia. Yet these initiatives, according to interviewees, while designed to be long-term are ‘aimed at experts, not the general public’ and are ‘not seen to offer partnership relations to Russia.’ Moreover, some of these initiatives ‘remain rather vague’ even to experts. The EU-Russia partnership in energy, education and the economy sectors were noted. However, these are ‘areas of pragmatic interest’. In contrast ‘all that concerns the issues of ideology or political interests does not develop successfully’, due to the perceptions of the Russian authorities.

Economy and trade

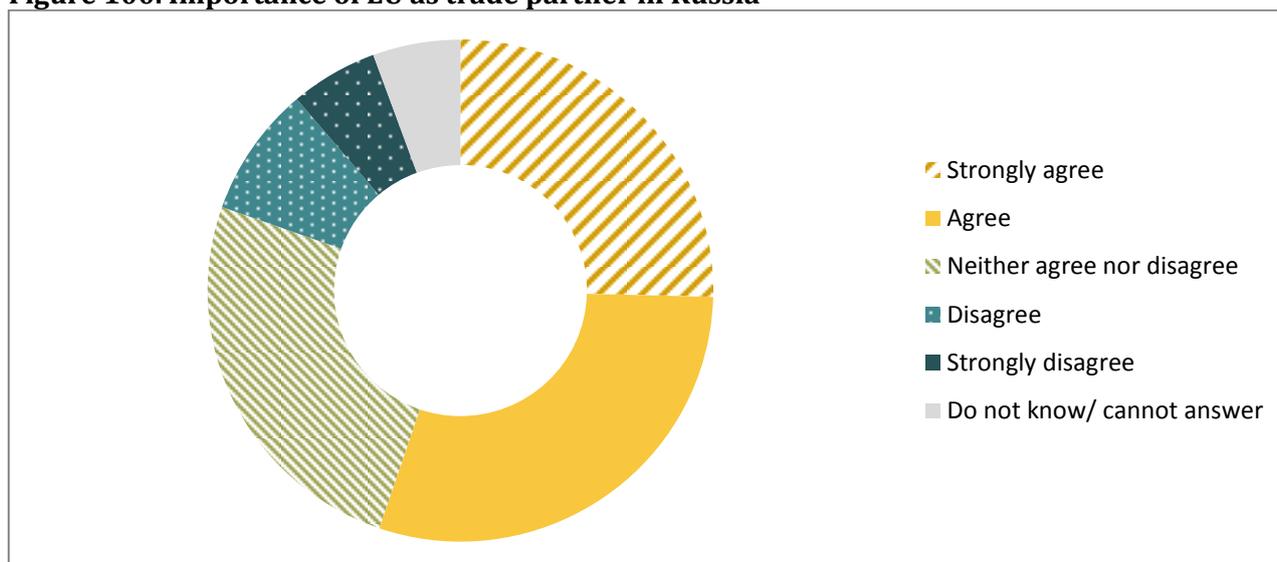
In the selected Russia news *media*, the EU's political and economic actions led the coverage and received a similar share of media attention: economy was the dominant frame in the business newspaper, and political framing leading in the two popular newspapers. When it came to the coverage of EU economic affairs, the state of economy was extensively covered. It was the second most visible theme with a specific focus on Greece's debt crisis and Eurozone recovery. Predictably, the business daily paid particularly close attention to the ECB's anti-crisis measures. Most of such news carried a neutral evaluation, where a bias was detected negative images dominated over positive ones. Russian press often presented the EU's image as a helpless person who cannot manage its house that is falling apart. Also, the negatively coloured news items contained a high level of sarcasm towards the EU's inability to deal with economic challenges.

It was Russia-EU trade relations that dominated EU reporting in the economic frame. EU trade – and its sanctions against Russia in particular – was the most visible topic overshadowing ‘state of the EU economy’ (the most popular topic in the other nine countries). News on EU business/ finance followed. Much of the news in this EU trade frame related to business deals in the energy field. Here, EU dependence on Russian gas was the dominant issue reported (e.g. EU proceedings against Russia's gas company ‘Gazprom’ and reportage on the negotiations over the construction of the Turkish Stream Pipeline).

When looking at the ‘Europe’ dataset, news on economic issues led in the business newspaper. In contrast, the two popular dailies prioritised reportage of social issues when reporting Europe (see below). ‘Europe’ news in the three papers dealt overwhelmingly with business and finance, and principally, with Russia’s companies and oligarchs investing and doing business in Europe, Russia’s exports to Europe in general and Europe’s oil/ gas market. *Kommersant* and *Vedomosti* also reported extensively on the European car industry market.

A high profile given to the EU (and Europe) in the economic field correlated with *public opinion*. In the eyes of the general public, the EU is mostly associated with economy. The European Central Bank was the second most visible EU institution (sharing this rank with the European Commission), only slightly behind the European Parliament. The Euro was the most visible among the items describing the EU. A high share of the poll respondents agreed that the EU is an important trade partner for Russia (see Figure 100). An even higher share strongly agreed that economic ties between Russia and the EU should be stronger. The EU is perceived as performing fairly well in financial services and banking as well as in global trade. Yet, respondents agreed that the EU was protecting its market at the expense of others in Russia.

Figure 100. Importance of EU as trade partner in Russia



Note: Based on the answers to survey Q14: Looking from Russia’s perspective, how strongly do you agree or disagree with each of the following statements about the economic relations with the European Union? The European Union is an important trade partner with Russia (N = 1321)

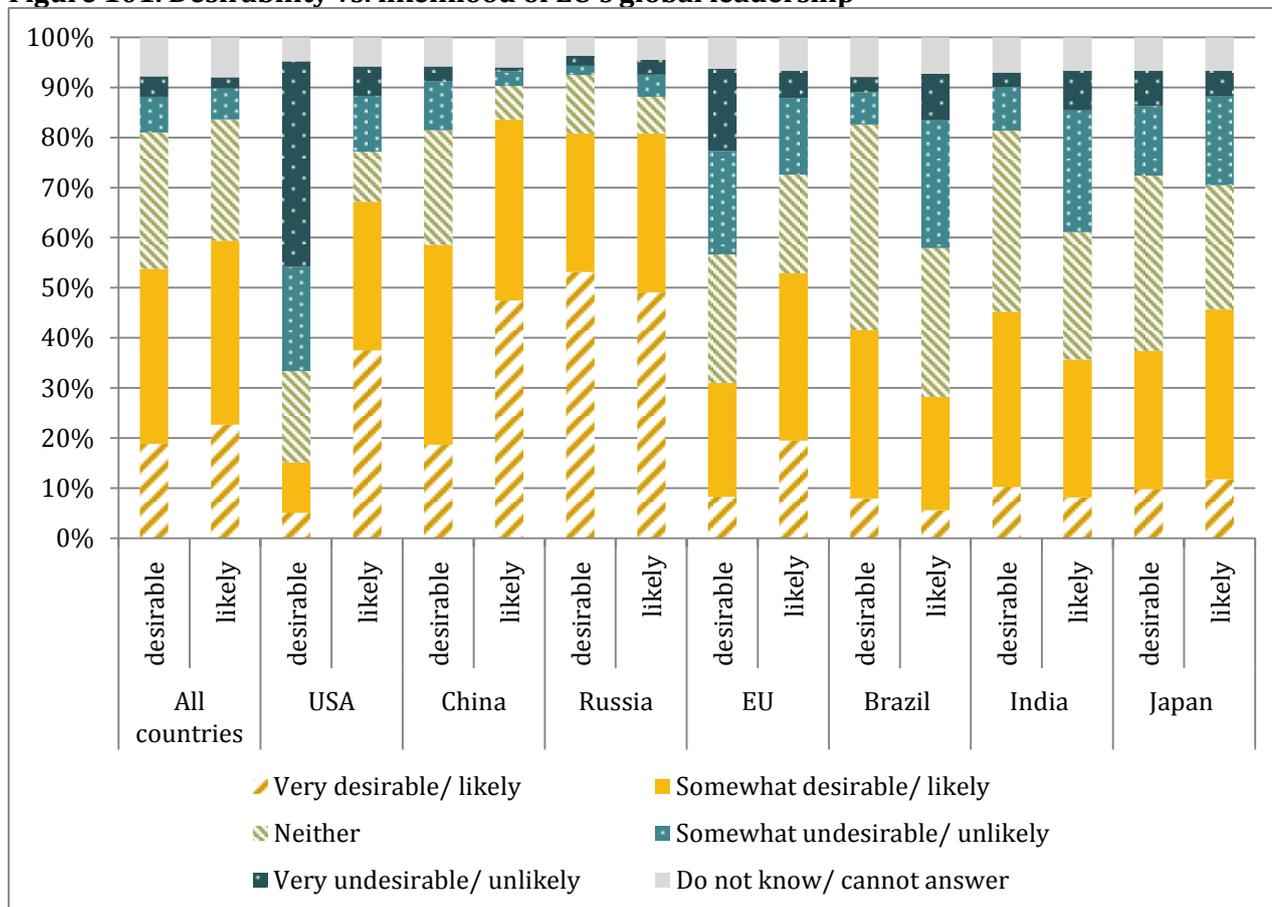
A small cohort of *elites* interviewed in Russia conveyed their objective recognition of the EU as an important economic partner for Russia. Some elites also reported awareness of various initiatives between the EU and Russia, mostly from the past (e.g. projects related to investment, opening factories, cooperation with Volkswagen, Volvo, etc.).

Politics and security

The *general public* in Russia saw the EU to be an important, but not a trustworthy partner for Russia in international relations. In the eyes of the Russian public, EU **leadership** in world affairs was not seen as desirable (see Figure 101). The EU was ranked lower than all other countries in terms of overall desirability of its leadership with the exception of the US. The

EU also lagged behind Russia, China and the US in terms of how respondents gauged the likelihood that it would take a strong leadership role in the future. In Russia, most respondents saw China and Russia as the major players in world affairs in the future.

Figure 101. Desirability vs. likelihood of EU's global leadership



Note: Based on the answers to survey Q4: How desirable is it that each of the following countries and organisations take a strong leadership role in world affairs; and Q5: How likely or unlikely is it that each of the following countries or organisations will take a strong leadership role in world affairs five years from now? (N = 1321)

On performance in **global peace and stability**, the EU lagged behind Russia, China and the UN. In Russia the EU's performance was seen as similar to that of NATO and the US. Looking more specifically, the EU's performance in the fight against terrorism was regarded slightly less negatively than other fields related to peace and stability, namely military operations or peacekeeping operations.

Elites voiced limited reflections on EU-Russia cooperation on global security. Most reflections mentioned NATO. Some interviewees demonstrated awareness of joint programmes of Russia and Europe in the field of security in Afghanistan. For others, while issues around NATO remain a matter of dispute for Russia and its European counterparts, there is a vision of uniting efforts in the fight against ISIS: 'that's why we need to work with NATO.'

In *media*, the EU's *external political affairs* attracted substantial attention. However, the majority of such news did not look at the EU's global actions but dealt with EU relations with Russia over the Ukrainian crisis or relations with Ukraine. Also EU relations with Moldova, Macedonia and Turkey attracted significant media attention. Looking into the dataset

'Europe', Europe's controversial relations with Russia were also the most visible theme across all media outlets followed by reportage on Europe's relations with Ukraine in the light of the ongoing crisis. Importantly, the EU was depicted by the press as visible in the region, but not *the* crucial regional actor. The newsmakers framed the EU as an almost equal to Russia as a regional actor, who has both improvements and challenges. A Russian *elite* echoed this media frame, stressing that the Eastern Partnership project 'generally failed, because the Member States are too different.'

In contrast to other countries, the EU's dealings with Iran received much less visibility than EU-Russia-Ukraine relations in the 'EU' dataset. In the 'Europe' dataset, Europe's relations with NATO and the USA were somewhat visible. There were also articles that reflected on the historical elements of contemporary Europe-Russia political relations and highlighted Europe's relations with the USSR.

The newspapers reflected on the lack of cohesion in the EU. The EU's *internal political actions* were reported through the EU negotiations with Greece, the British election and referendum on Brexit, elections in Poland and corruption in the EU/ Member States. Brexit (rather than Grexit) attracted most media attention in Russia. Lack of coherence was reported to undermine EU action and the EU was often presented as unable to face challenges due to incoherence. The negatively coloured news in this frame contained sarcastic commentaries towards the EU's political weakness and incoherence of the EU's actors and provided critical, if not sceptical views of the EU's achievements. Despite these negative connotations, Russian media stood apart in this ten-country study in their attention to the systemic institutional aspects of the EU, rather than cyclical (e.g. elections) or unusual/ scandalous/ dramatic (e.g. financial and refugee crises) happenings. As a point of difference, Russia's media featured extensive debates over the *institutional architecture of the EU* through in-depth pieces written by experts/ academics who scrutinised the framework of supranational unions, the EU's contribution to the concept of a supranational polity, and the EU's experience in political integration. The media asked to what extent the EU was independent from its Member States.

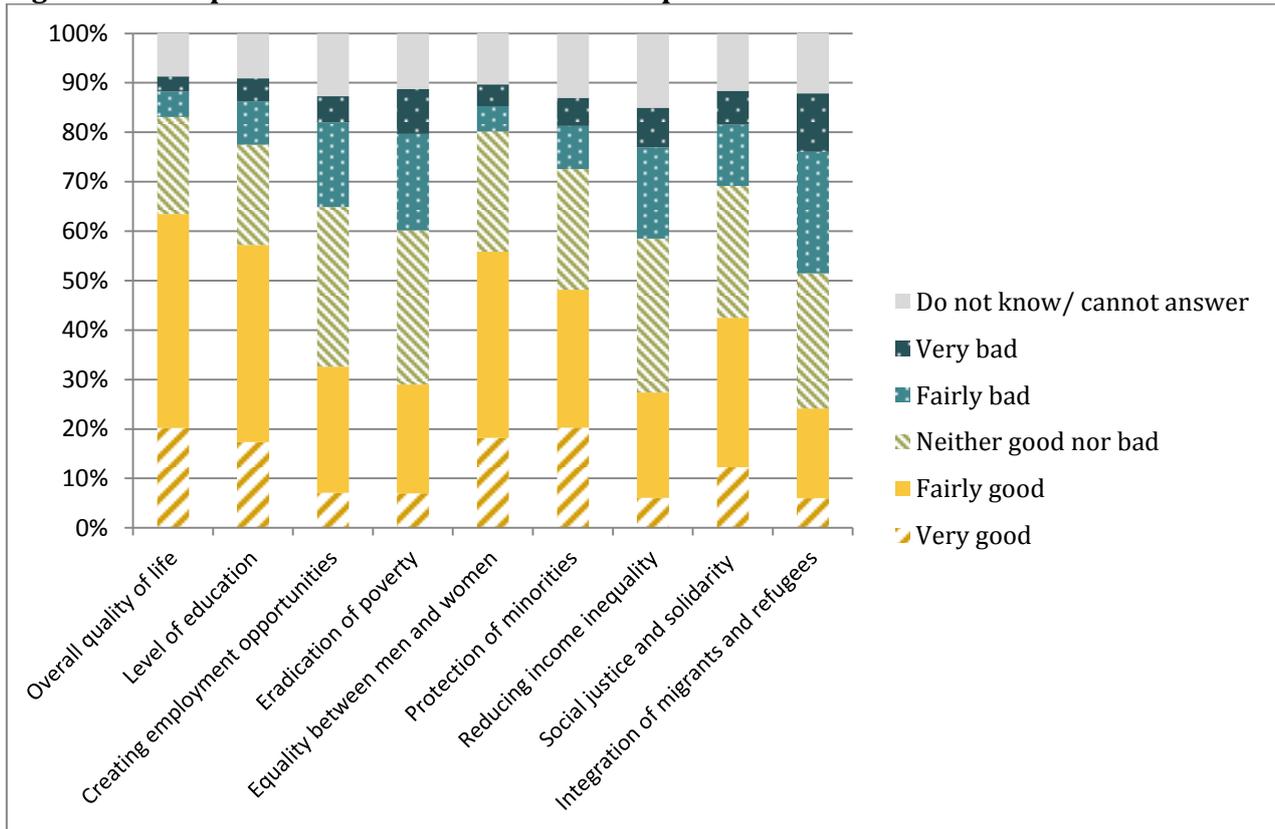
Development (social internal and international)

The EU and Europe's **international development** frame received minuscule *media* visibility in the monitored outlets. For example, Europe was mentioned in this field only in two articles in the pro-government *Rossiyskaya Gazeta*.

Public opinion, reflecting on the support to developing countries, viewed the EU as less important than Russia or the UN. Respondents ranked the EU similar to the World Bank or China. However, the Russian public saw the EU as playing a more important role in this respect compared to the countries used for comparison.

Speaking about **internal social development**, the areas where the EU was seen as most effective were overall quality of life, the level of education, and equality between men and women, whereas the areas where it was seen as performing less well included integration of migrants and refugees as well as reducing income inequality (see Figure 102).

Figure 102. EU performance across social development indicators

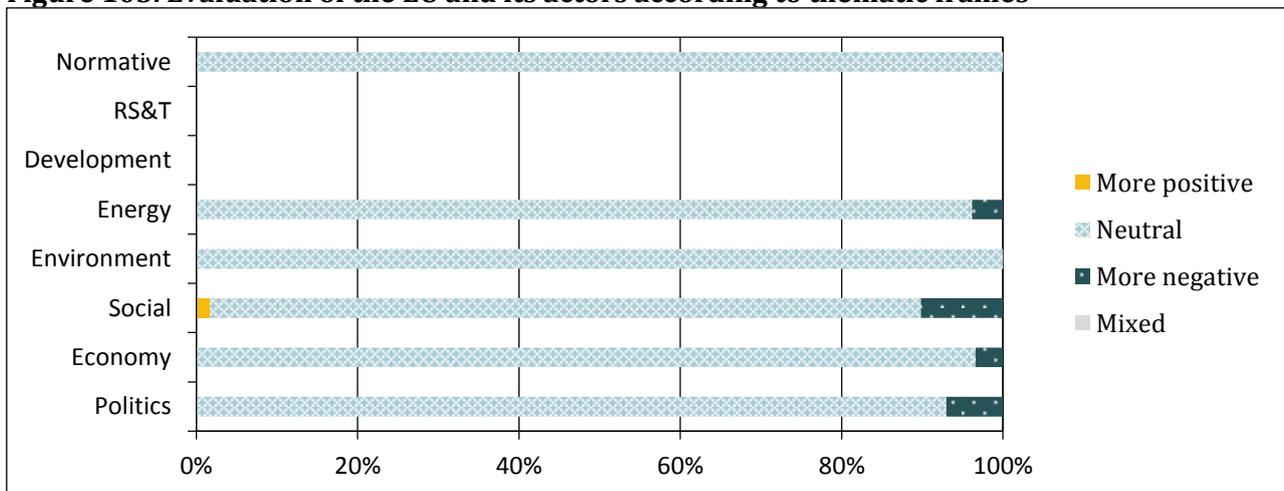


Note: Based on the answers to survey Q17: Generally speaking, how well do you think the European Union performs in each of the following areas of social development? (N = 1321)

Migration, multiculturalism and human rights

With the social affairs being the third most visible theme in EU *media* coverage in Russia the issue of **migration** (particularly, the problem of ‘boat refugees’) dominated EU news in the two popular papers. The business paper prioritised a different theme – the EU’s ‘right to be forgotten’ online. EU images in the frame of the migration crisis attracted visible negative profiles often presented through sarcastic comments about the EU’s migration policy (Figure 103).

Figure 103. Evaluation of the EU and its actors according to thematic frames



Note: as there were no articles on RS&T and development in Russia’s EU dataset these two respective themes received no evaluation.

The *public opinion* survey echoed these media frames. It showed that in Russia the EU's dealing with refugees (and displaced people) was seen as more negative compared to evaluations of the EU's performance in other fields. The EU's integration of migrants and refugees was also seen as the most negative area of social development. For comparison, respondents evaluated the EU's performance in gender equality as the most positive of the human rights related issues listed in the survey. Also, in terms of internal social development, Russian respondents saw the EU as performing fairly well in the protection of minorities. Nevertheless, in terms of multiculturalism the EU was seen as lagging behind Russia.

Environment and energy

Media coverage of **energy** issues while modest, was larger than in the other nine countries in this study. Cooperation on Russia-EU energy relations was visible. The energy media discourse was dominated by Europe's energy access, the construction of the Turkish Stream Pipeline and Europe's energy competitiveness. The Russian media predominantly focused on two aspects of Russia-EU energy relations: firstly, the issue of the transit of Russian gas and oil to the EU Member States; and secondly, on the considerable gap between Russia's and the EU's energy policies and the consequential conflict in bilateral trade relations. Arguably, energy news on the EU was primarily selected in accordance with the topicality of an issue rather than reflecting the importance of the EU as an actor. The negatively coloured news items contained a high level of sarcasm towards the EU's ambiguous relations with the energy supplying countries.

Russia-EU energy relations were extensively covered within a business frame discussed above, triggering media frames of supply and competitiveness (rather than sustainability which was hardly visible). Yet *elites* demonstrated awareness of energy sustainability issues for the EU. Commenting on the energy question in the light of Ukraine's crisis, a group of leading academics shared an opinion that Ukraine's conflict means that 'the whole situation will give a significant impulse to the development of European science in the field of energy. (...) this conflict will positively influence the development of alternative sources of energy.'

Environmental issues rarely appeared in the *media* coverage of the EU: where they did, they covered carbon emissions, petrol quality regulations and the recycling requirements for car exporters. Similarly, Europe was rarely mentioned in relation to environment, but where it did it appeared in the contexts of environmental standards, the greenhouse effect and environmental impacts in the Arctic territories.

In the eyes of the *general public*, the EU's role in fighting global climate change and protecting the environment was seen to be similar to its role in maintaining global peace and stability. The EU in this respect falls behind Russia, however respondents felt that the EU performed similarly compared to other international actors – somewhat better than the US or China, but somewhat worse than the UN or Japan. In Russia, protection of environment and the fight against climate change were the fields in which the EU was seen as performing well.

Impressionistic reflections from the *elites* demonstrated that for some of the *elites*, the EU's reputation for environmental protection was seen to stem from the reputations of some Member States who were the exemplars to follow in this area (e.g. Denmark or Germany).

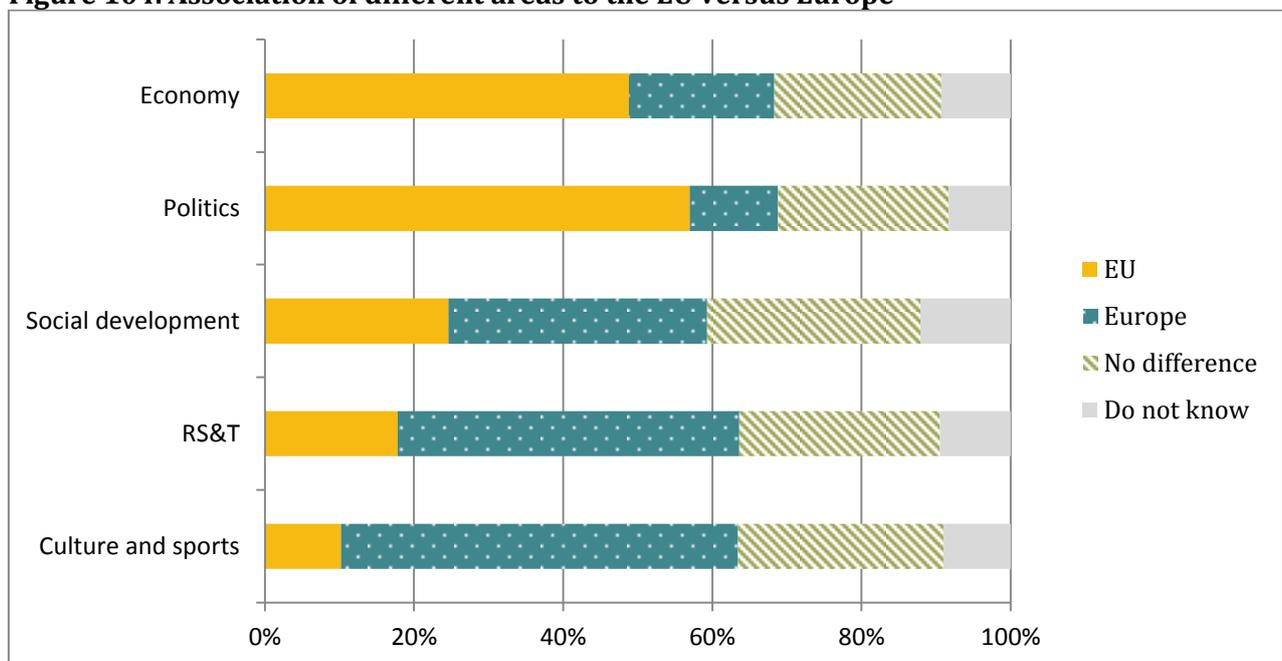
Research, science and technology

The **research, science and technology**, as well as normative frames received no or little visibility in the *media*. In the 'Europe' dataset, a slight increase was noticed, with technology issues more visibly reported (limited reportage covered IT-technologies, deep-sea exploration technologies and space technologies).

In parallel with this low media profile, the Russian *public opinion* survey revealed that in the field of innovation and technologies, respondents saw the EU as lagging behind Japan, China, the US and Russia. Respondents viewed the EU's importance in innovation and technological progress in a somewhat more positive light compared to other areas. However, they saw other actors as much more important than the EU in this field. Despite the overall reserved view on EU's global importance in this field, respondents felt the EU performed fairly well in various fields of technology, science and research, and especially in medical research.

In terms of how respondents differentiate EU and Europe, science together with culture and sports as well as social development were associated first and foremost with the term Europe, whereas Economy and Politics were firstly associated with the (EU Figure 104).

Figure 104. Association of different areas to the EU versus Europe

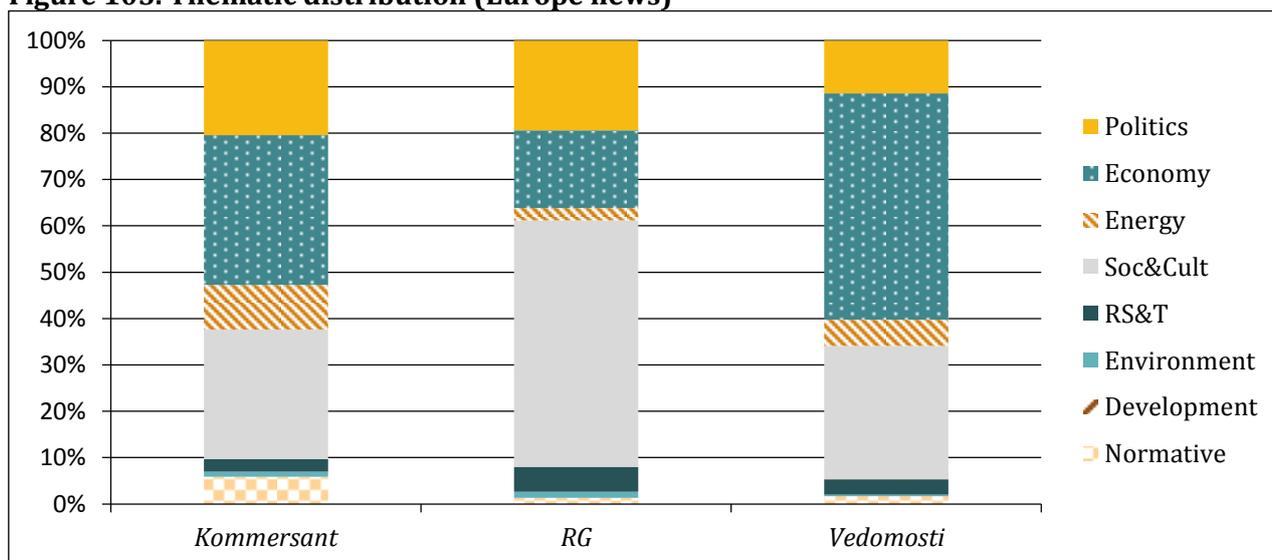


Note: Based on the answers to Q23: Some people think about Europe, whereas others think about the European Union when talking about economy, politics, culture, sports and other areas. In your case, which term – Europe or the European Union - comes to your mind first when you think about the following subjects? (N = 1321)

Culture

Russian news *media* generally prioritised reporting on Europe's economy, although a relatively significant attention was given to the EU's/ Europe's cultural profiles and/ or actions as well (see Figure 105). In particular, Europe was reported in the context of guest performances by European theatres, road tours of European musicians and movie releases.

Figure 105. Thematic distribution (Europe news)



When compared to other countries, EU Member States were seen as attractive for their **culture** and lifestyle (even if EU countries did lag behind Russia and Japan). Even though respondents evaluated all areas related to European culture very positively, they were more likely to choose luxury goods and clothes, monuments and museums, modern architecture and design, arts over lifestyle, cinema and theatre, music, and history. Russian respondents generally saw Europe as an attractive tourist destination, both personally and for Russian tourists in general.

A small group of *elites* interviewed for this study demonstrated their general awareness of and familiarity with various EU policies towards Russia, although often had difficulty in naming specific initiatives. Importantly, cultural and educational programmes were among the best known. Elites specifically stressed success of the Years of Culture initiative undertaken by individual Member States. The ‘Year of Culture of the EU’ was one idea proposed to extend cultural dialogue between the EU and Russia.

Education

Russia’s *general public* viewed the EU rather positively in terms of the level of **education** of its population, and regarded the EU as an important partner for Russia’s educational exchanges. While the Russian *elites* suggested that people in Russia want to study in Europe, the Erasmus programme was the least visible of the images describing the EU listed in the public opinion survey.

Elites were vocal about the EU’s educational outreach towards Russia – on all levels. In general they recognized the success of those programmes supported by the EU and its Member States – they ‘brought money, while people were in need of that money. Plus it was just interesting. People learned something new, a different way of working.’ A long list of EU-initiated programmes mentioned by the elites included: Tempus, Erasmus Mundus, European Documentation Centre, the European Consortium on Trend-Setting, Jean Monnet Lifelong Learning programme, International Science and Technology Centre (ISTC) and other international assistance to other post-soviet countries. Visits of Russian politicians, public figures, scientists, scholars to Munich, Berlin and Brussels (including to the European Commission) were mentioned and appreciated. A parliamentary programme for Russian

activists to visit local parliaments and Bundestag was also noted. The outreach of the Member States did not go unnoticed. Among those most visible were: the British Council; the Cervantes Institute; the Polish Institute; the Alliance Francaise; the Austrian Academic Exchange Service; and the Stockholm International Peace Research Institute. Special recognition went to a plethora of programmes supported by Germany: the Goethe Institute; Deutsche Gesellschaft für Auswärtige Politik; the Alexander von Humboldt Foundation; the Hanns Seidel Foundation; the Konrad Adenauer Foundation; German-Russian energy agency RUDEA; the German Academic Exchange Service; and Deutsche Gesellschaft für Internationale Zusammenarbeit. In fact, elites commented that 'European programmes maybe less known, but German, English and Italian programmes are easier to understand. They are a little bit closer to the people.'

Commenting on the outreach programmes supported by the EU and the Member States to Russia, a group of interviewed academics admitted that 'In general, it is not bad. But not enough. All of these educational programmes ... should be on a much higher level. So if you strategically see Russia as a threat or as a partner, or if you see it from a strategic point of view, it is not possible not to see it from Europe because it is painted as a very big spot on the map. Therefore, cooperation is important. The best method.' Another interviewee stressed that 'the most relevant are exchange programmes which should be initiated for pupils, for students, for graduate students, to researchers of the European Union, to have more opportunities to learn from Europe. We need to increase the number of students and teachers who could come to Russia.'

The EU as a norm-setter

Normative profiles in EU *media* reportage in Russia were almost invisible (there was only one article 'that briefly mentioned the EU as a 'normative power' – the EU's promise to support Egyptian prisoners in accordance with the international norms). Interestingly, the normative frame was more visible in relation to Europe rather than to the EU. Europe in the context of human rights received the highest coverage in the normative frame. Articles that featured the 'normative' dimension referenced 'Europe' within diverse topics (e.g. Crimean prisoners that are in between Russia's and Ukraine's jurisdiction systems; an army recruit that applied to the Strasbourg Court; the Russian Institute of regional press that applied to the Strasbourg Court for the implementation of the law on foreign agents; or the decision of Ukraine's Parliament to adopt laws that were seen by Russian press to limit human rights).

Elites expressed a range of views on the EU's normative messages, reporting rejection and resistance, as well as adoption and adaptation, albeit in subtle ways. Characteristically, most of these views were critical. Comparing the EU with the 'emerging power', a civil society interviewee stressed that these 'emerging powers' 'do not demand that Russia changes in a way that they like, as the EU does.' This elite continued that the EU's 'political dullness, willingness to impose their worldviews is inappropriate for us; we don't want to adopt their worldviews. So, any projects of the EU are always characterized by them willing to impose their values, which these countries don't have.' He concluded this 'top-down' approach by the EU imposing normative visions is counterproductive to EU-Russia collaboration. In contrast, the cooperation with the 'emerging powers who do not 'talk at' each other 'goes faster, more interestingly, and the problems are solved more easily.' Another elite echoed this view: 'Russia's role in EU-Russia relationships is often interpreted as a junior partner.'

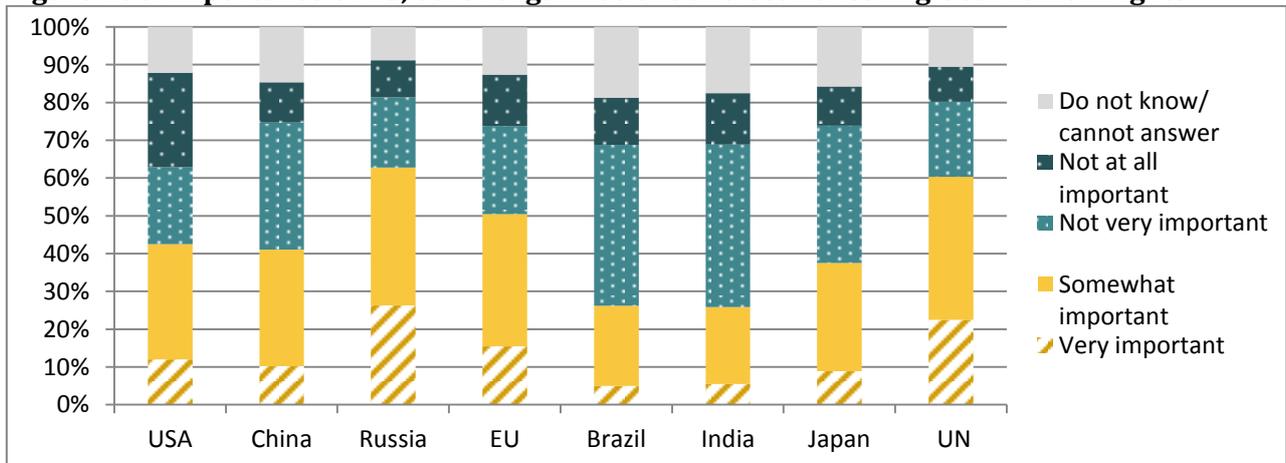
Elites' negative reactions are also due to the perceptions of the EU's double standards, especially in the area of human rights: 'given publications containing condemnation of Russia and forming the image of Russia as a human rights abuser, [it, human rights abuse] can be done by the EU.'

Elite also demonstrated nuanced views on the EU as a normative power that suggests that there was recognition of 'quiet diffusion' of European norms and values. This media analyst and gatekeeper admits that when 'examining the situation in more details, it is clear that everyone pays attention to the EU, and tries to adopt some innovations of the EU, for example, in a social sphere. But all of that is happening quietly, due to the fact that many officials travel to Europe, they can see how it works there, and, as we can see, it is all adopted privately.... However, officially the EU does not serve as a model in Russia, first of all because Putin, who lived in Germany, does not believe that democratic institutions can really work efficiently. He believes that it is just a decoration, and that in reality the society there is as corrupted as everywhere and not a democratic one.'

Elites also demonstrated awareness of various avenues through which the EU tries to reach to Russia in its quest to deliver normative messages. Among those who were active, elites listed: the European Commission; the Friedrich Ebert Foundation; the Böll Foundation; the Rosa Luxembourg Foundation and the Ministers of the Northern countries and the North-West of Europe. These are the programmes related to the protection of human rights and anti-discrimination. The Embassy of the Netherlands was also seen as active in supporting social, labour and trade union projects. Projects supported by the European Union and European Commission, the European Court for Human rights, the European Social Charter, Chatham House, the Eastern Partnership, BBG school of journalism, and Erasmus – all were seen as contributing to the normative dialogue between Russia and the EU.

Russia's *public opinion* regarded the EU's importance in promoting and defending human rights worldwide very similarly to how it fares in social development, with the most important being the UN and Russia, and with the EU seen as playing somewhat larger role than the US, China and Japan (Figure 106).

Figure 106. Importance of EU, other organizations and countries in global human rights



Note: Based on the answers to survey Q10. In your view, how important a role do each of the following countries or organisations play in in promoting and defending human rights worldwide to protect human dignity, freedom, equality and solidarity? (N = 1321)

3.7.4 Local conditions: explaining the perception of the EU in Russia

Perceptions are a result of interactions between internal (Russia-specific) and external (EU-specific and global) factors. In most cases cultural and historical differences are not seen by the elites to be the key obstacles for cooperation with the EU. Education and language issues were not considered a problem. The system of education in Russia is different from the European system, but it is moving towards common principles. Experts of both sides were seen as able to find common grounds.

Some experts stress that economic modernisation in Russia could be implemented only after institutional (and normative) changes. Yet, among one of the most powerful factors argued by the local experts that taint perceptions was mutual arrogance, a significant obstacle to cooperation. Elites reported that both sides have ‘problems with willingness to learn [from each other]. The parties are seen as deaf to each other on a number of topics.’ Thus both interlocutors saw themselves as producers of norms and values that should be respected by the other side. An open dialogue, rather than preaching, was needed. Future research on perceptions of the EU in Russia should focus on a close systematic examination of the role of normative self-perceptions in Russia and factor this ‘cultural filter’ into creating a meaningful policy dialogue on various levels.

Connected to this is the difficulty of political contexts on both sides that impose ideological restrictions on a number of sensitive issues. Respondents described contemporary conflict as a consequence of irrational behaviour of politicians who put ideological interests before economic reasons. In this light, it is important to factor in perceptions of the emerging powers vis-à-vis the EU’s perception. The rising powers were seen as important actors, with ‘their economy and potential for development [being] much more promising than the one of the EU and many countries of the EU. Europe is getting older, steadily losing its economic potential, whereas the countries mentioned above are on the new wave of development. That’s why they are interesting for Russia, and it is worth running business and politics with them, it’s worth making deals on energy with them. What is also important is that these countries don’t impose their rules and views.’ Future research on EU perceptions in Russia should focus on the systematic study of the EU’s images vis-à-vis images of the ‘emerging powers’.

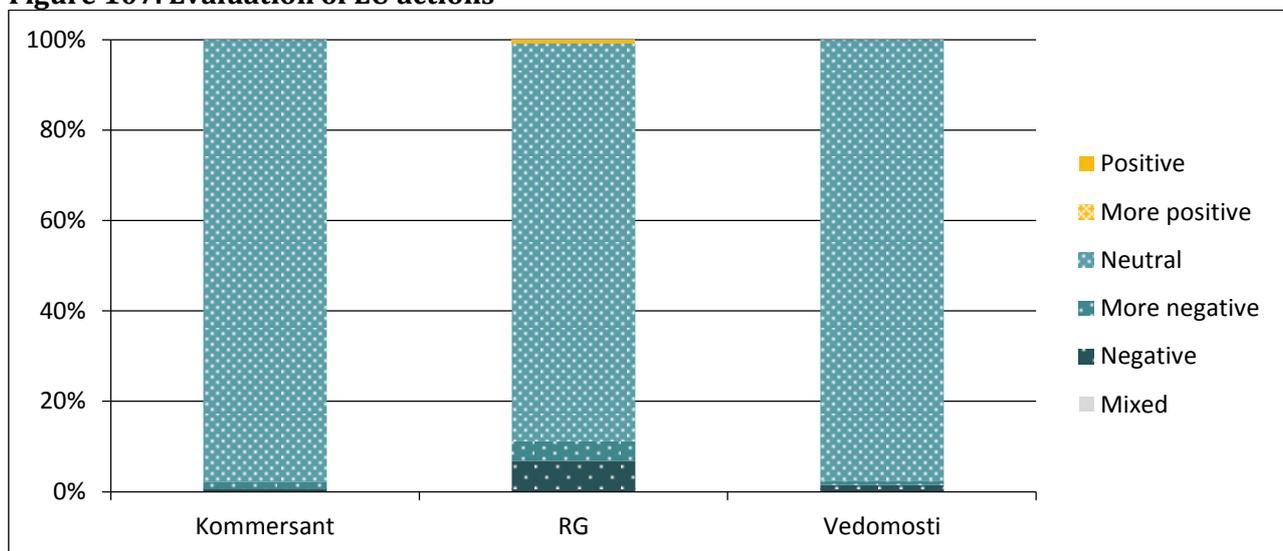
The interviewed experts were also critical of a lack of flexibility on the part of the EU in designing outreach programmes. For example, a series of programmes that were well received in the early nineties, now seem inadequate in modern-day Russian circumstances. To the contrary, education was seen to possess the ability to draw together the parties. Future research of EU perceptions should pay closer attention to the images of the EU among those in Russia who benefited from EU educational exchange programmes and those who did not participate in the programmes. EU Public Diplomacy could look into developing a set of measures to involve and collaborate with the alumni of such programmes upon their return to Russia.

3.7.5 Recommendations for EU Public Diplomacy

Despite the fact that the share of neutral news in the EU and Europe datasets was predominant, Russian influential media featured clearly visible sarcasm and criticism in the negatively coloured reportage (Figure 107). Echoing this, public opinion demonstrated that

when respondents compared the EU to other countries, the EU was typically among the most negatively viewed (only less negatively than the US) and at the same time was rarely seen as positive. Compared to other international organisations, respondents evaluated the EU negatively. Among organisations the EU is only falling behind NATO. The public most commonly described the EU as hypocritical, multicultural and arrogant; and least often described it as united, peaceful or trustworthy. This is in line with the negative general view of the EU as well as the negative assessment of Russia's relationship with the EU. Both the EU and USA were most often described as hypocritical, arrogant or aggressive, even if the EU was described as aggressive less often than the US. The EU was least often described as united, peaceful, trustworthy, efficient, strong or modern in general and also when compared to most other countries. These negative public perceptions are of a concern and challenge EU Public Diplomacy. The 2011 study of public opinion in Russia by the same company with the same-size sample showed that the top four adjectives describing the EU were 'modern', 'united', 'likable' and 'strong'. Within a short time frame public perceptions demonstrate a critical change plummeting to a dominating negativity. This suggests a revolutionary reassessment of the EU Public Diplomacy outreach in Russia and a different level of support.

Figure 107. Evaluation of EU actions



In addition, regression analysis showed that the likelihood of respondent having a positive overall view of the EU was somewhat higher for those from the higher age cohort. Respondents from age groups of 35-44 years and 55 years or older also tended to have more positive opinion about the performance of the EU in different areas. Older respondents also tended to have a more positive view towards the culture and lifestyle of EU countries. This finding indicates that EU Public Diplomacy in Russia faces an additional challenge and has to invest into targeting younger members of the public.

To combat this radical shift in perceptions, two lines of outreach could be considered. Firstly, the EU should continue active outreach and support exchanges with experts, stakeholders and elites (not only political and business, but media, academia, think tanks and civil society). Experts are open about their appreciation of the first-hand experiences of the EU (as professionals and people of status) and reveal that these contacts are critical for 'quiet diffusion' of norms and values (as discussed above). These interactions could be a better place to undertake mutually respectful normative dialogues where both sides have an

opportunity to voice their positions, listen to each other and try to understand each other without imposing views. Such exchanges would be seen as critical to trigger 'listening' to each other. Related to this avenue is the suggestion to incorporate Russian experts into the design and re-assessment of the collaboration programmes to ensure local voices/perspectives are listened to. Also, Russian experts seem to relate easier to the Member States than EU programmes. Thus EU Public Diplomacy could reinforce its outreach using programmes (new or existing) of the Member States. The programmes are a critical element as they serve as a gateway to 'creation of a positive image of the EU and those who implement these programmes.' Some elites also noted that Public Diplomacy would work best in parallel with contacts at a governmental level: the authorities can be rather critical if not jealous of any attempts to negotiate with anybody except officials.

Yet, a real challenge for EU Public Diplomacy is to overcome two dominant visions on the state of EU-Russia dialogue. Firstly, elites share a view that the EU is not ready to listen to Russia, or it listens just to its 'clients' ('they always choose those people, who support their ideals'). The second view is somewhat gloomier – that under the current (and past) political regimes in Russia dialogue is impossible as the leadership is not interested in dialogue. Some experts mentioned a popular stereotype among Russians that viewed Russia as always being over-ridden and standing in the shadow of the Western/ European civilization. Relations between Russia and EU will be cohesive only if Russians (not only politicians) feel themselves as equal partners in the dialogue. It should be stressed that this research was undertaken during a time of bitter conflict between Russia and the West. This conflict dominates many facets of life. The change in TV coverage of EU countries (and EU as a whole) came immediately after the sanctions that the EU countries imposed on Russia, when Russia occupied the Crimea and then annexed it (this dramatic change in attitudes could be observed in a press release by Levada think tank¹⁰; see also NCRE research of EU perceptions in Russia in 2011-12, including media images). This also explains why the EU has negative perceptions close to that of NATO. The interviewed elites were very cautious in their opinions, and tried not to go against the official position of the government. The Country Experts predict that when the sanctions are lifted the attitudes of Russians towards the EU will improve, and those among the elites who sympathize with the EU and the West will be more confident.

The second avenue to revise negative perceptions of the EU is to support educational exchanges on a much bigger scale – on various levels of the Russian educational system (tertiary and secondary, both students and teachers). Importantly, it is not only about Russian students and teachers going to the EU, but their EU counterparts also coming to Russia.

The interviewed experts did not expect any rapid improvements in the relationship between Russia and the EU. To facilitate a timely Public Diplomacy initiatives the EU should link to the institutions that were identified as potential partners by the local experts: MGIMO (Moscow State Institute of International Relations, Ministry of Foreign relations); IMEMO (Institute of World Economy and International Relations, Russian Academy of Science); the Agency for strategic initiatives (ASI) (state agency); Creative Diplomacy (NGO); the Gorchakov

¹⁰ <http://www.levada.ru/28-09-2015/monitoring-otnosheniya-rossiyan-k-drugim-stranam-sentyabr>

Foundation (pro-government); Memorial (watchdog); Political parties; RPR-PARNAS, YABLOKO; Nezavisimaya gazeta (independent newspaper). Elite also mentioned that regions close to Europe (Kaliningrad, Karelia, St. Petersburg) could be more open for contacts with the EU. Russia's middle class, business, students should be as much a priority as the Russian government. Local media listed several Russian actors who were already interacting with the EU. Among the most visible individuals were Putin, Medvedev, Peskov (Press Spokesman for the President), Novak (Minister of Energy), Siluanov (Acting Minister of Finance) and Narishkin (Chairman of the State Duma). Among the most visible businesses were Transneft (energy company), Gazprom (energy company), Lukoil (energy company) and Sberbank (bank).

The Country Experts identified the presence of two distinct groups of potential partners for the EU: 1) those who are close to the Russian government, or can be seen as organisations that understand the government's position (such as MGIMO and ASI); and 2) those who are already close to the EU and its values (these were also the same organisations whom some of elite representatives called 'clients'). Differentiating and working with these different types of partner can entail different objectives for the EU. In the former case, the EU may try to better understand the government's position and build indirect connections with the government oriented organisations, including NGOs. In the latter case, the EU could focus on and work with those who genuinely share the same values.

Recommendations for EU Public Diplomacy from practitioners on the ground in Russia

From the perspective of practitioners at the EU Delegation on the ground there are several areas where EU Public Diplomacy should concentrate its efforts. Firstly, practitioners recognised that a fast and efficient exchange of information on most recent developments and events is crucial as a reactive instead of active approach runs the risk of undermining the EU's credibility. Secondly, encouraging the exchange with EU Member States can be used to make experts available that are instrumental for successful EU PD. Furthermore, a strong coordinated stance among EU and individual Member States is needed. Thirdly, practitioners noted that no attempts of political intimidation can be accepted, but local actors should be encouraged and supported. Among those outreaches, non-political outreach (education sphere or local/ urban development) is seen to have a significant demand from the Russian side. As Russians are generally very proud to have a commodity – oil and gas – which Europeans need, pipeline infrastructure and technology should be used as a tool for political negotiations. Finally, practitioners reiterated that Public Diplomacy should be designed on a local level and relate to local conditions. Outreach must remain flexible, while an overarching plan addressing the EU's main objectives and messages must be in place.

3.8 South Africa

This country chapter presents a synthesis of the South Africa-specific findings of media and social media analysis; elite interviews and public opinion poll that were all conducted in the framework of this study. The chapter follows the logic of the research design with the main findings structured according to the common research criteria – visibility; actorness and local resonance; and norm-setter. For actorness and local resonance, these are discussed in keeping with the themes analysed in this research: economy and trade; politics and security; normative and human rights; development; migration, multiculturalism and human rights; environment and energy; RS&T; culture; and education. The local conditions that help to explain the perception of the EU in South Africa are presented and the chapter concludes with recommendations for Public Diplomacy, including a subsection on recommendations in the eyes of practitioners based at the EU Delegation in Pretoria.

3.8.1 Sample

Public Opinion

The online omnibus survey was coordinated and analysed by the Public Policy and Management Institute (PPMI) and conducted by TNS Global. The respondents in South Africa were surveyed in English. Data collection took place in August 2015. The online omnibus survey was designed to be nationally representative with regards to age, gender and region. The survey covered a total sample of 1169 individuals within the 16-64 age group.

Media

The media content analysis was designed, supervised and coordinated by the National Centre for Research on Europe (NCRE), University of Canterbury, New Zealand, and conducted by local researchers trained by the NCRE. Two popular prestigious papers: *The Times*, *The Star*, and a business newspaper *Business Day* were monitored daily between April 1 – June 30 2015 using e-search engine Press Display to ensure high accuracy in data collection. Two separate datasets were collected over the period of observation – ‘EU’ (251 articles) and ‘Europe’ (200 articles). Key search terms for dataset ‘EU’ included (with acronyms) ‘The European Union’, ‘The European Commission’, ‘European Parliament’, ‘European Court of Justice’, ‘European Central Bank’, ‘European Presidency’, ‘Council of the European Union’, ‘Eurozone’. The key search terms for dataset ‘Europe’ were ‘Europe’ and ‘European’.

Elite opinion

The NFG coordinated the interview programme and designed the questionnaires in close coordination with the Country Experts and the project partners. The NFG was also responsible for the training of the Country Experts and supervision of the implementation of the interviews. The interviews itself were conducted by the Country Experts. Interviews have been conducted as a source to identify upcoming trends and to cross-check findings. They are non-representative due to their current scope and should be considered as a tool for future evaluations in a representative volume. The NFG chose a three-phased approach: in Phase I, two transcripts were due until June 6; in Phase II, five interviews were due until July 15; and in Phase III, five interviews were due until August 17. The NFG was in charge for the coding of the transcripts and the provision of the results to the project partners.

Interviews in South Africa were conducted in English and transcribed by the Country Experts. They interviewed 11 experts (Academia/ Think Tank (2), Civil Society/ NGO (3), Business (2), Policy-makers (2), Media (2)) and conducted one group interview with two assistant lecturers from the Department of Political Science at the University of Pretoria.

Semi-structured, anonymous qualitative interviews under Chatham House Rules were conducted with all EU Delegations across the 10 Strategic Partner countries, primarily in the form of a group interview. The groups included Heads/ Deputy Heads of Delegations, Heads of Press and Information Section and/ or Heads of Political Affairs Section. Interviews lasted between 60 to 90 minutes. In South Africa two diplomats were interviewed.

NB: two robust datasets collected in the course of public opinion survey and media monitoring allow for quantitative and qualitative analysis of data (for more detailed information, please see attached country-specific media and public opinion reports). Survey of elite opinion is impressionistic due to small numbers of the interviews. Data collected is analysed using qualitative approach.

3.8.2 Visibility

The *Media* reporting of the EU in South Africa was the lowest of the 10 countries examined (the averages for the 10 country sample were 505 articles in the EU dataset and 635 articles in Europe dataset). Nevertheless, when reported, the EU predominantly played a major role in the news reports (Figure 108). Notably, this was not the case in relation to the ‘Europe’ dataset (see Figure 109). The EU’s visibility was linked mostly to specific events within the EU that were of public interest in South Africa. During the period of analysis the two main stories were: the UK election and the potential impact on British membership; and the Greek situation and its Eurozone membership. Another event that contributed to EU visibility was the South Africa-US negotiations about the renewal of African Growth and Opportunity Act (AGOA) in April, where the EU was mentioned as a preferable trade partner for South Africa. Another issue that generated a proportionally higher volume of news in April compared with May concerned the migrations flows over the Mediterranean, which peaked sharply in the last 10 days of April.

Figure 108. Degree of centrality (EU news)

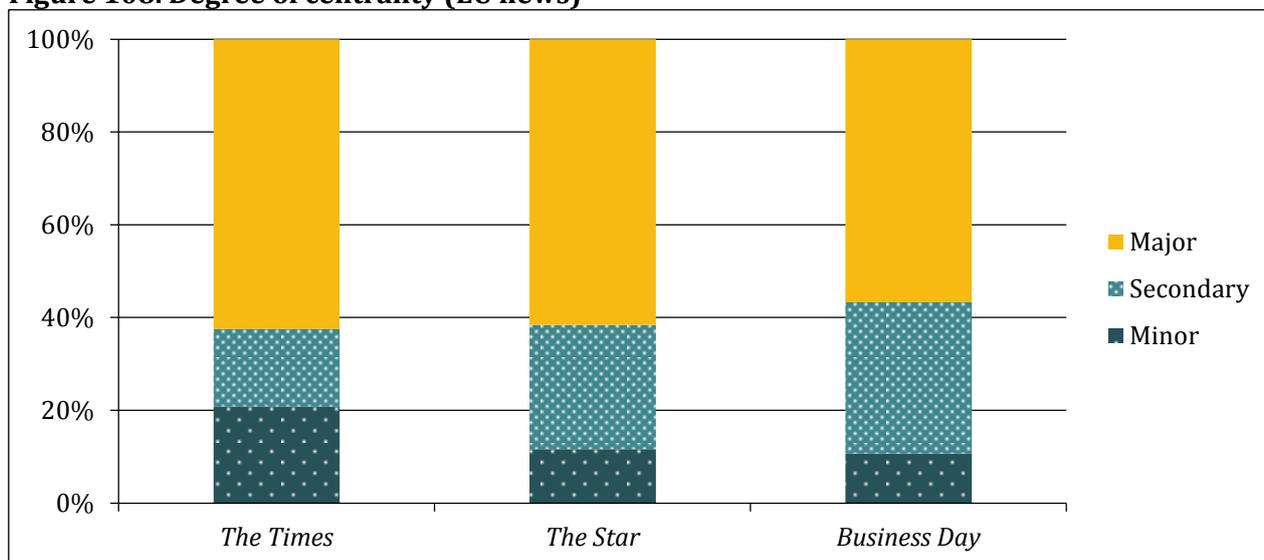
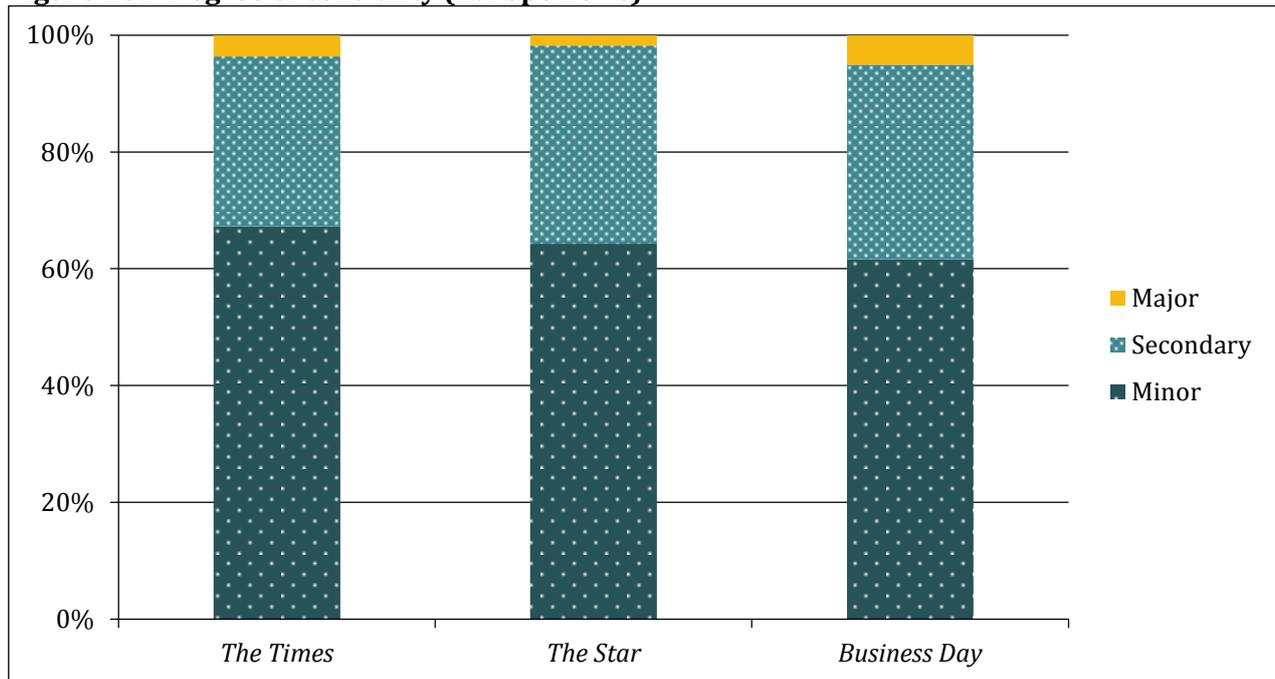


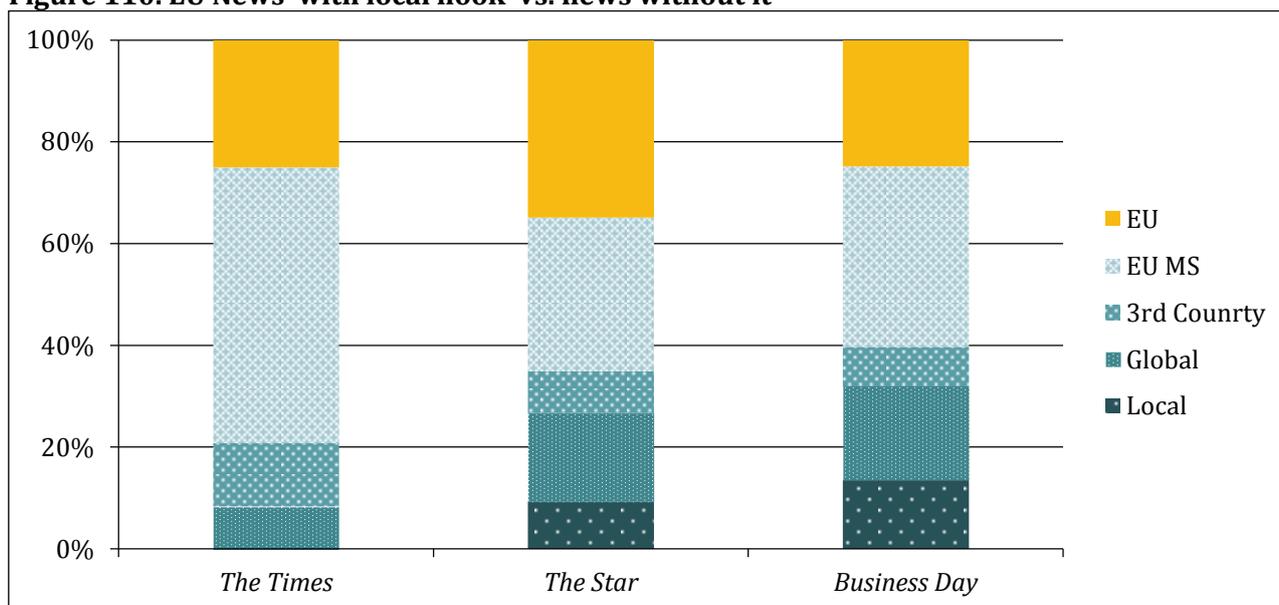
Figure 109. Degree of centrality (Europe news)



Placement also provides key insight to the topics of importance. The two popular dailies published the majority of their stories in their business sections. The *Business Day's* international section was where the EU appeared most frequently. Interesting, in both *The Star* and *Business Day* the opinion section had a number of stories involving the EU. Significantly, these stories tried to make what was happening in the EU relevant for South African readers. It is interesting to note that most articles were of medium length. *The Times* hardly carried any stories that could be classified as long. Moreover, most stories featuring the EU assumed some prior knowledge of the events being reported. This is most likely because *The Times* is closely linked with *The Sunday Times*, which is a much denser and serious newspaper published once a week. The *Business Day* being an analytical daily newspaper had the lengthiest articles. The length of the articles in *The Star* and *Business Day* were normally at least 500 words. Most articles were not accompanied by photos. Arguably, this was due to the lack of relevance some articles had for South African society, with only articles deemed more relevant to the local readership including a photo. Conceptual metaphors of health continually called the wellness of the EU into questions, and conceptual metaphors of war/ violence emphasised the struggle and challenges the EU was facing in returning to pre-2008 conditions.

In summary, EU-related news items were confined largely to political and economic frames reflecting the events that place the EU on the world stage. Foremost amongst these was Greece and its political leaders (see Figure 110). Largely international sources were used, with few articles that focused on the local level. Broadly speaking, reporting was not analytical but rather factual, with some opinion pieces reporting the effects of the events in Europe on South Africa. In terms of tone, overall the evaluation was neutral, but with more negative than positive outliers mainly because of the 2008 recession and its on-going negative impact.

Figure 110. EU News ‘with local hook’ vs. news without it



In terms of visibility of EU institutions/ Member States and figures, the recent Greek situation resulted in Alexis Tsipras and Yanis Varoufakis being covered extensively. Greece was mentioned in around one-third of all articles collected, and this reflected the importance of this issue in South Africa, with the prospect of the Euro’s instability affecting the South African economy. Juncker was the most visible EU official, again largely because of his involvement with the Greek situation. The European Central Bank (ECB) was similarly frequently reported: Draghi, the second most mentioned EU official, was virtually always referred to in conjunction with both Greece and the ECB. David Cameron had high visibility in May due to the UK election. Over the course of the 3 months, all but one member state (Slovenia) were mentioned. In terms of leaders, Angela Merkel and Francois Hollande were typically mentioned because of their role in the Greek negotiations: other leaders and officials were rarely mentioned outside this context (with the notable exception of Margrethe Vestager, who featured in the anti-trust cases against American corporations), and Federica Mogherini (who was visible largely because of the Mediterranean migration situation during May).

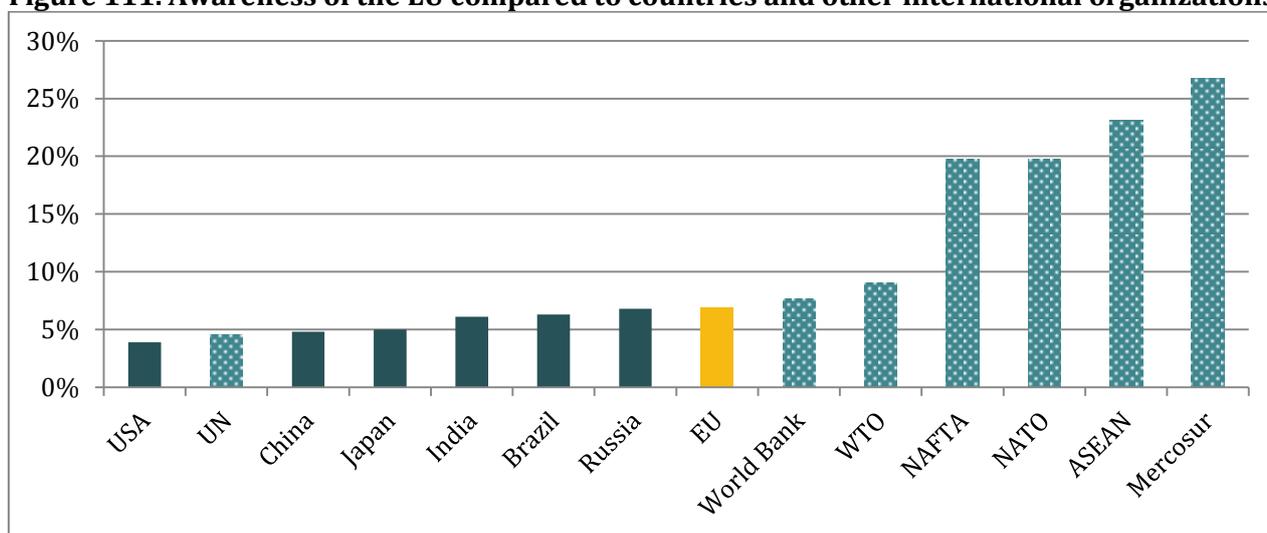
Unusually, the ‘Europe’ dataset was somewhat smaller than that for the EU, but it was employed across a wider variety of categories and topics; typically it was a minor aspect of a story and simply used as a general reference point or commented on in passing. There were just a handful of news items that highlighted Europe as a major actor. The South African ‘Europe’ dataset was also the smallest of the 10 countries analysed. The article lengths were usually medium or long in *The Star* and *Business Day*; however even *The Times* (which had no long articles in the EU dataset) published several long articles. The length of the articles and the lack of centrality point to Europe’s comparative irrelevance in important articles, as well the limited number of substantial pieces written on Europe in general.

Where it was more precisely focused around an issue the economy and social issues were the most important frames (for example, visibility increased during the peak of the migration crisis and Greek negotiations). There was a comparatively large volume of articles on Europe business and investments and a significant proportion of Europe news was located in the newspapers’ business section. However, overall in terms of placement, no one category could

be identified as overwhelming typical for all three newspapers reflecting the greater variety of contexts in which Europe can be used compared with the EU (in contrast to the placement profile found in the EU dataset). Human interest articles were linked to specific events such as WW2 celebrations. Nonetheless, evaluations were largely neutral. Importantly, Europe was not used typically as a synonym for the EU – Europe was used as a geographic rather than institutional reference.

EU visibility amongst South African *public opinion* was marginally below, but broadly similar to that of the countries used for comparison: it was more visible than most international organisations (except for the UN) (see Figure 111). The EU was among the most positively viewed (below only the US) and at the same time was rarely seen negatively (just ranking behind Japan, and comparable to Brazil); and again respondents evaluated the EU more positively than other international organisations except the UN.

Figure 111. Awareness of the EU compared to countries and other international organizations



Note: Based on the answers of option ‘Do not know/ cannot answer’ to survey Q1: Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations? (N = 1169)

In South Africa, the economy and politics are first and foremost associated with the EU, whereas culture, sports and science is primarily associated with Europe. This would suggest that in South Africa the EU is mostly visible as an economic and political union.

Attitudes towards different EU Member States also provide an insight into what promotes the visibility and perception of the EU. France, Italy, Germany and Spain were seen as the most attractive Member States, with the Central and East European countries the least attractive. These responses could be read to suggest that the most visible Member States are those most popularly associated with the EU, and thus contribute the most to an overall descriptive image of the EU.

The limited number of elite interviews confirmed this mixture of EU visibility combined with the Member States. Individual Member States rather than the EU itself were usually seen as more enthusiastic and more effective because of their approach. It seems clear that the EU often benefits from the shadow of its Member States and not vice versa. Here historical and cultural ties (UK, German, and Dutch), educational programmes and the like help to raise the EU profile. One NGO interviewee built on this intergovernmental conundrum by linking adequate knowledge to the level of visibility: ‘part of the confusion I think for a lot of people is that Europe because it’s still in a bit of flux, because it’s still forming some of the

organisations and coming up with... it's not entirely clear how to 'deal with Europe', quote unquote.'

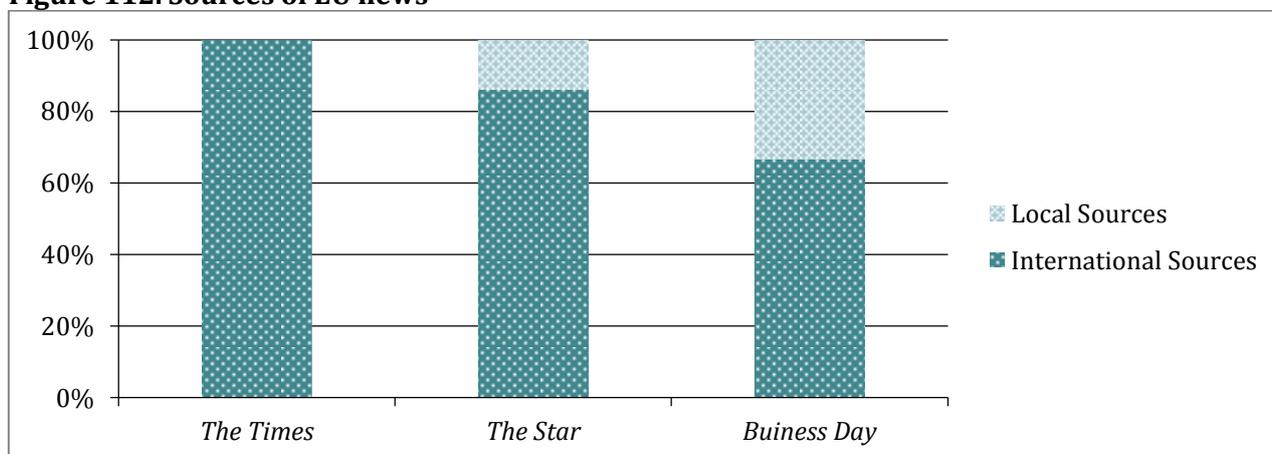
3.8.3 Actorness and local resonance

The EU as a partner

In terms of the focus of domesticity, the vast majority of articles focused on the EU itself, with just a small number of articles being global, located in a third country or in South Africa. *The Times* had no articles that reported on the EU within South Africa. A few, *Business Day* articles featured topics such as AGOA and its implications for South Africa as well as the SA-EU citrus market. This reflected a tendency of the South African media not to engage with the EU as locally important source of news. Rather, the majority of the articles reported on the EU as a geographic space rather than a diplomatic entity.

For the most part, the EU was reported through international sources that were edited for South African readers (Figure 112). *The Times* did not have a single article on the EU written by a local correspondent. *The Star*, which has a stronger international news section, did not make use of any correspondents to cover the EU, but rather used international sources. *Business Day* had a much higher local correspondent element, which can be attributed to the more analytical stories about the EU in relation to South Africa; however, international sources still predominated, cementing the belief that the EU is not an attractive topic for journalism in the South African media. For the most part, visuals that were paired with articles were stock photos and not those of the newspapers' own journalists.

Figure 112. Sources of EU news

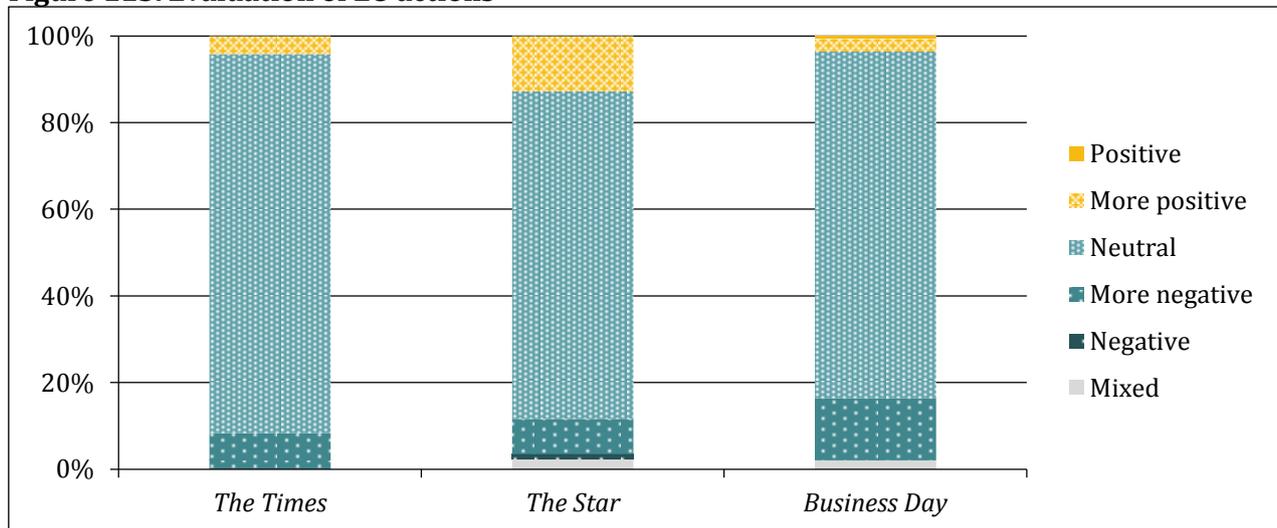


In the 'Europe' data set there was a balance between international and local sources. The increased number of local correspondents for the Europe articles in the *Business Day* can be attributed to the type of articles that were reported; the majority were company reports where Europe was a minor actor, and acted as a geographic actor. Local correspondents mostly reported on South African companies in Europe and European companies in South Africa.

The general evaluation was that EU reporting was neutral in tone, largely due to the EU not being seen as a relevant or important actor within South African sphere (Figure 113). The articles that were published were factual and did not contain particularly emotive or critical assessment of the EU (with the possible exception of those on the environment). Positive

tones found in some economic stories concerned the strengthening Euro and rising economic power of the EU, and the potentially advantageous repercussions that could have on South Africa. Conversely, negative evaluations were associated with stories on the treatment of African migrants, something that South African readers would find relevant. Thus the conclusion can be drawn that ‘emotive’ articles are correlated to the direct impact on South Africa.

Figure 113. Evaluation of EU actions



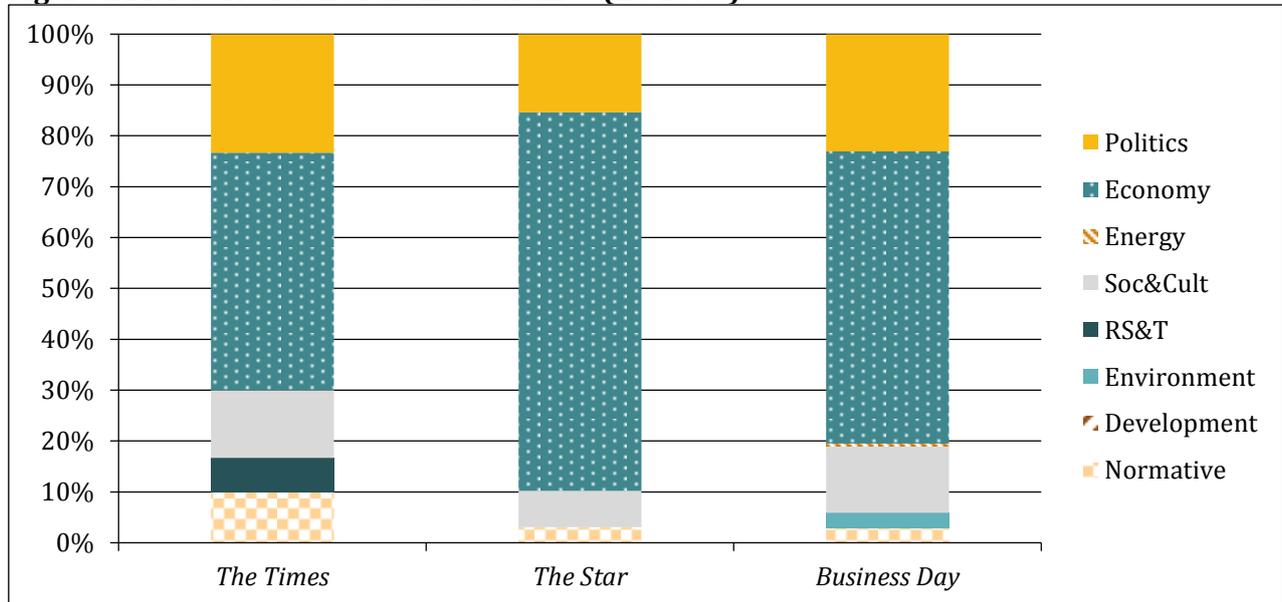
Similarly, ‘Europe’ was evaluated as neutral in the majority of the articles in this analysis. Moreover, the prevalence of negative and positive evaluations was much lower than in the EU dataset (reflecting the nature of the Europe articles and the high degree to which Europe was a minor or secondary actor). In terms of the frames, the negative/ neutral tone was much stronger than the positive, similar to the EU dataset. The explanation is somewhat peculiar, however, as the stories were about the International Cricket Council (ICC) and the global condemnation of South Africa for failing to detain Omar Al Bashir. The media took the opportunity to point out the hypocrisy of western powers, Europe included, and cited examples of their lack of justice when dealing with the ICC.

In terms of newspapers, *The Times* was by far the most neutral percentage wise, which once again is in line with its less intense and analytic approach. *The Star* was also largely neutral; however the indicators for positive and negative evaluations were more apparent in this data. The *Business Day* had far more negative than positive evaluations, and can be attributed to *Business Day’s* marginally more critical approach and tendency of the newspaper to discuss deeper issues

In summary, largely international sources were used for EU news articles – possibly because most journalists are unfamiliar with and cannot accurately report in the EU. Three key events dominated reporting: UK election and Brexit, Greek financial situation, Mediterranean migration. Thus the EU was hardly reported outside the political, economic and social frames (see Figure 114). There were few stories on South Africa-EU interactions, thus a low mention of local actors who interacted with the EU; but where there were news items this tended to be largely negative in evaluation. For ‘Europe’ international sources were also typical (except for *Business Day*). Local authors used Europe in opinion piece articles, as a reference point in economically orientated articles. *The Star* and *Business Day* had a strong focus on the

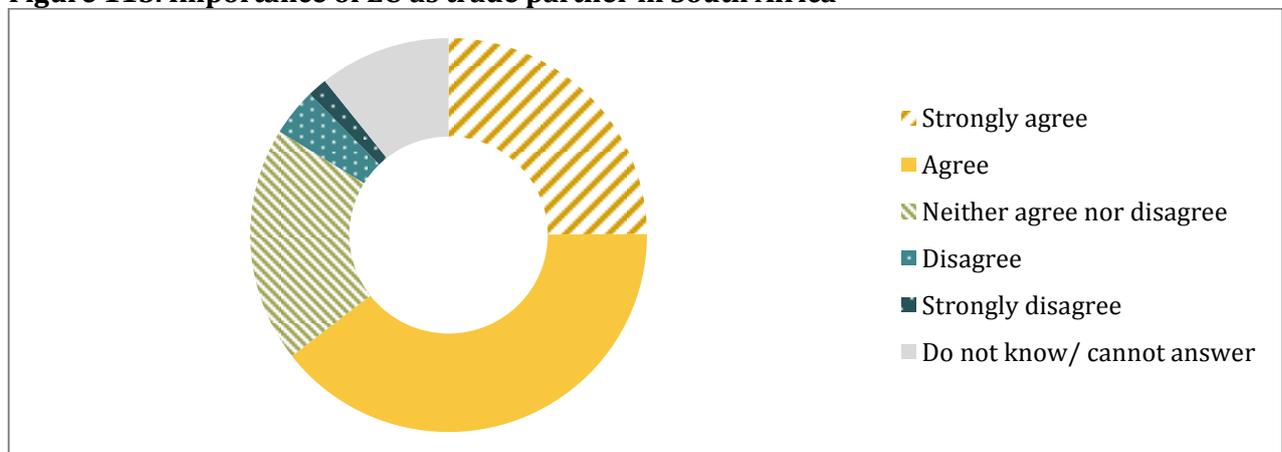
economy: *The Star* prioritised Business and Finance (European business performance, and the state of the Euro) while *Business Day* focused largely on the state of European banks (Deutsche Bank, HSBC, etc.) and economic relations between South Africa and Europe. Europe news in *The Times* was strongly social in orientation with a focus on migration and football.

Figure 114. Distribution of thematic frames (EU news)



Turning to *public opinion*, unlike in many other countries under study, there was no negative correlation in the way South African respondents viewed one country or organisation in comparison to another. Just under half of respondents perceived EU-South African relations as good (a lower figure than for perceptions towards China, the US and India). Within this predominantly benign perspective respondents agreed the EU was an important trade partner (see Figure 115) and foreign investor in South Africa; saw the EU as important and trustworthy partner in international relations; and acknowledged the importance of the EU in educational exchanges. However, 29 per cent of the survey respondents expressed a negative attitude (and 11 per cent gave no response) towards the relationship.

Figure 115. Importance of EU as trade partner in South Africa



Note: Based on the answers to survey Q14: Looking from South Africa’s perspective, how strongly do you agree or disagree with each of the following statements about the economic relations with the European Union? The European Union is an important trade partner with South Africa (N = 1169)

The *elite* interviews question both the EU's motivations as well as impact. As expressed by one press editor: 'the EU does not come across as a compassionate actor. It comes across as a self-interested organisation... They want spread their values for their own interest; they want to expand economic interests for their own interests.' This theme of self-interest was echoed by a civil society activist who described the EU's motivation as 'being driven by want[ing] to punch at the same level as the US should... it's a nonsensical target really.' A business interviewee picked up on the idea of arrogance and deafness (although this applied equally to the EU and the USA): 'I find that I'm speaking into a black hole. It's like I have no voice. You suddenly feel that you've been demoted like five notches. So do I think that it is better to have the US here than to have the Europeans? No. They all have their... the Chinese, they all have their agendas.' The interviewees frequently juxtaposed the EU with China drawing economic, trade and political difference: 'look at the kind of values that South African espouses in its constitution, then the values shift to more western European cum African values, which you won't find in China... there is no doubt that South Africa wants to safeguard its relationship with Europe at all costs. But their political rhetoric sometimes goes haywire' (press editor). One NGO commented: 'I don't think that the EU has one set of objectives and a clear sort of rationale... the EU like others, like the US government or British government or whatever, don't start from the starting point of what does South Africa really want or need.' More specifically, a local councillor argued: 'the ultimate outcome of the policy should be services on the ground and even there you should then be seeing some kind of influence from the EU and I don't see that in local government.'

Economy and trade

In the *media's* framing of the EU's economic news, unsurprisingly the Greek financial situation was the largest topic, led by coverage in the *Business Day*. This frame profiled the existence of both an EU recovery and decline, indicating a possible lack of an internal coherent position on the EU's current economic situation in each of the papers, suggesting a lack of proper engagement. *The Times* had the fewest articles reflecting its tendency to only report exceptionally important EU news.

The economy was the dominant frame in the Europe dataset, except in *The Times* where it was ranked second, reflecting once again its positioning as a popular rather than serious publication. The various topics were extremely varied, with the majority of the articles related to specific industries, or specific companies without having much else in common. Notable once again was the prevalence of contrasting news, of both an improving and declining Europe. Another observation was the higher interaction recorded between Europe and South Africa, compared to the EU dataset.

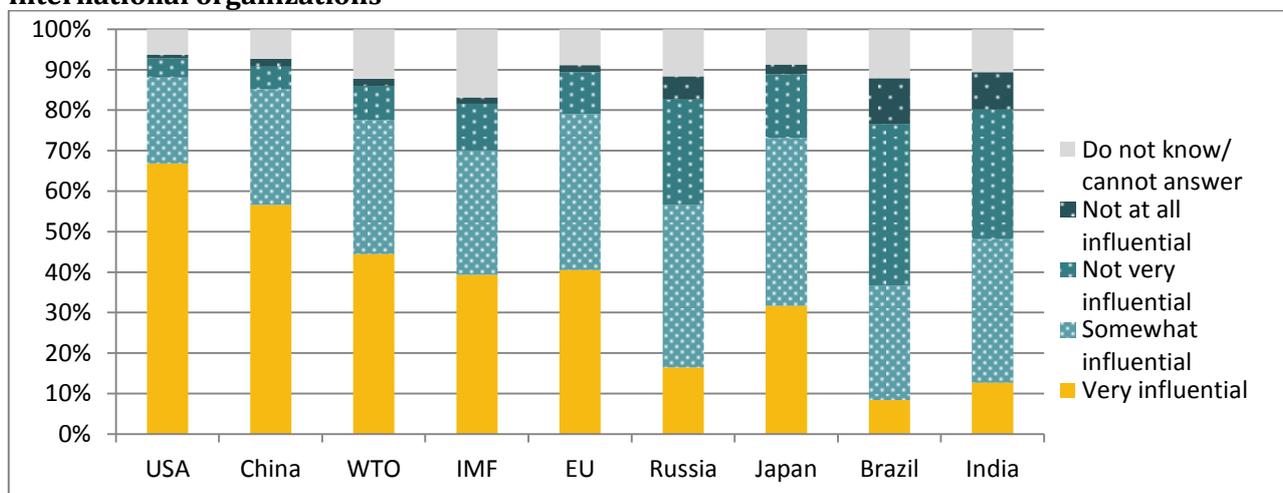
Elite interviewees seemed aware that the EU was a major trading partner with South Africa and globally; however varying degrees of importance were emphasised. A particular view of history also cast a shadow over perceptions of the West/ EU as an economic and trading actor. In the words of one CEO:

'I think there's more money flowing out than money flowing in... so if I look at it from that perspective, does it benefit us? If the net effect is negative then no, it benefits them. Because if one were to look at it from an ethical perspective, one would then say you stole our stuff, you stole our gold, you pulled our diamonds out and you created your wealth from that, you should be ploughing back, you should be restoring ... they created

artificial borders, they split up tribes, they created a lot of the havoc that we are seeing today, they had a significant hand in it. And it's not acknowledged, I don't hear them acknowledging it.'

The set online format of the *public opinion* survey did not so easily lend itself to such a level of articulation. The broad findings showed that the EU was among the global economic players South Africans see as most influential (see Figure 116). However in this respect respondents believed the EU lagged behind the US and China. When compared with organisations, the EU's influence was similarly ranked to that of the WTO and, to a lesser extent, the IMF. As elsewhere, the Euro was the most frequently mentioned symbol representing European integration, and the ECB was the most visible institution reported in the public survey, underlining the economic content of perceptions towards the EU.

Figure 116. EU's influence in global economic affairs compared with countries and other international organizations



Note: Based on the answers to survey Q6: In your view, how influential in global economic affairs are the following countries and organizations? (N = 1169)

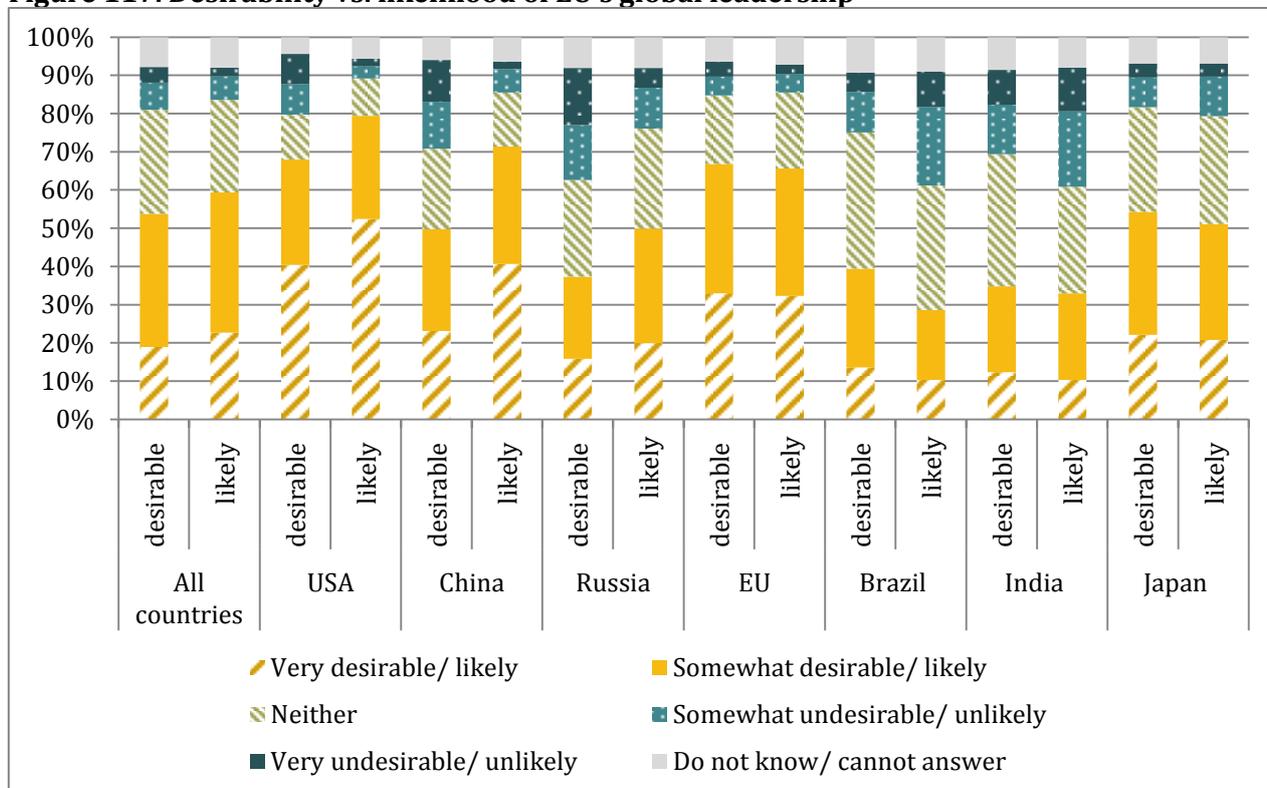
Politics and security

In the South African *media*, the EU political frame was largely dominated in all three newspapers by the UK election and the possible Brexit. The *Business Day* had the majority of stories in this frame, numerically exceeding the reporting on the UK from both *The Times* and *The Star* combined. In the 'Europe' dataset the framing was around external politics primarily, with articles about Europe and its interaction with Russia, Africa and the ICC. The stories surrounding the ICC are largely due to the incident in South Africa involving Omar Al-Bashir and his 'escape' from arrest while in South Africa. However, there were not a significant number of stories when compared with the EU dataset.

South African *public opinion* respondents considered the EU's leadership in world affairs desirable, the intensity of this feeling only marginally lower than supporting American leadership (see Figure 117). The likelihood of that happening in the future was rated strongly, although behind the figures for the US and to a lesser extent China. The difference between the EU and China was evident, but not as marked. Similarly, the EU was among the global players South African respondents saw as most influential (again trailing the US and China). When compared with organisations, respondents saw the EU's influence similar to that of the WTO and, to a lesser extent, the IMF. In terms of South African opinion on

performance in global peace and stability, the EU lags behind both the UN and the US. Looking more specifically, the EU's performance in peacekeeping operations was regarded slightly more positively than other fields related to peace and stability, namely military operations or the fight against terrorism.

Figure 117. Desirability vs. likelihood of EU's global leadership



Note: Based on the answers to survey Q4: How desirable is it that each of the following countries and organisations take a strong leadership role in world affairs; and Q5: How likely or unlikely is it that each of the following countries or organisations will take a strong leadership role in world affairs five years from now? (N = 1169)

Although very limited in number, South African *elite* interviewees were very vocal in expressing their views on the EU's global role and approach to international relations. Themes were wide-ranging covering education and development; cultural; governance models: politics was seen as important in the EU-SA relationship. Overall, the tone of the commentaries was rather critical. Some interviewees noted that support is declining, and that South Africa is no longer a priority for EU partnership and aid. Pragmatism was offered as an explanation in an interview with a business CEO: 'sending peacekeeping troops and all of these other projects, it's quite costly. And I don't think the European public has as much appetite for funds to be diverted outward right now, because they really are swimming in their own tears, you know their own pit of tears at the moment. So I don't think that the presence of the EU as a result is as tangible.' EU ambivalence was also seen in the decreased trade interaction. With the exception of Economic Partnership Agreements (EPAs) there seemed to be an overall lack of awareness of the EU's policies and objectives within South Africa. A familiar theme was also evident - most of the objectives and policies we regarded as trying to address problems that the Member States created as colonisers.

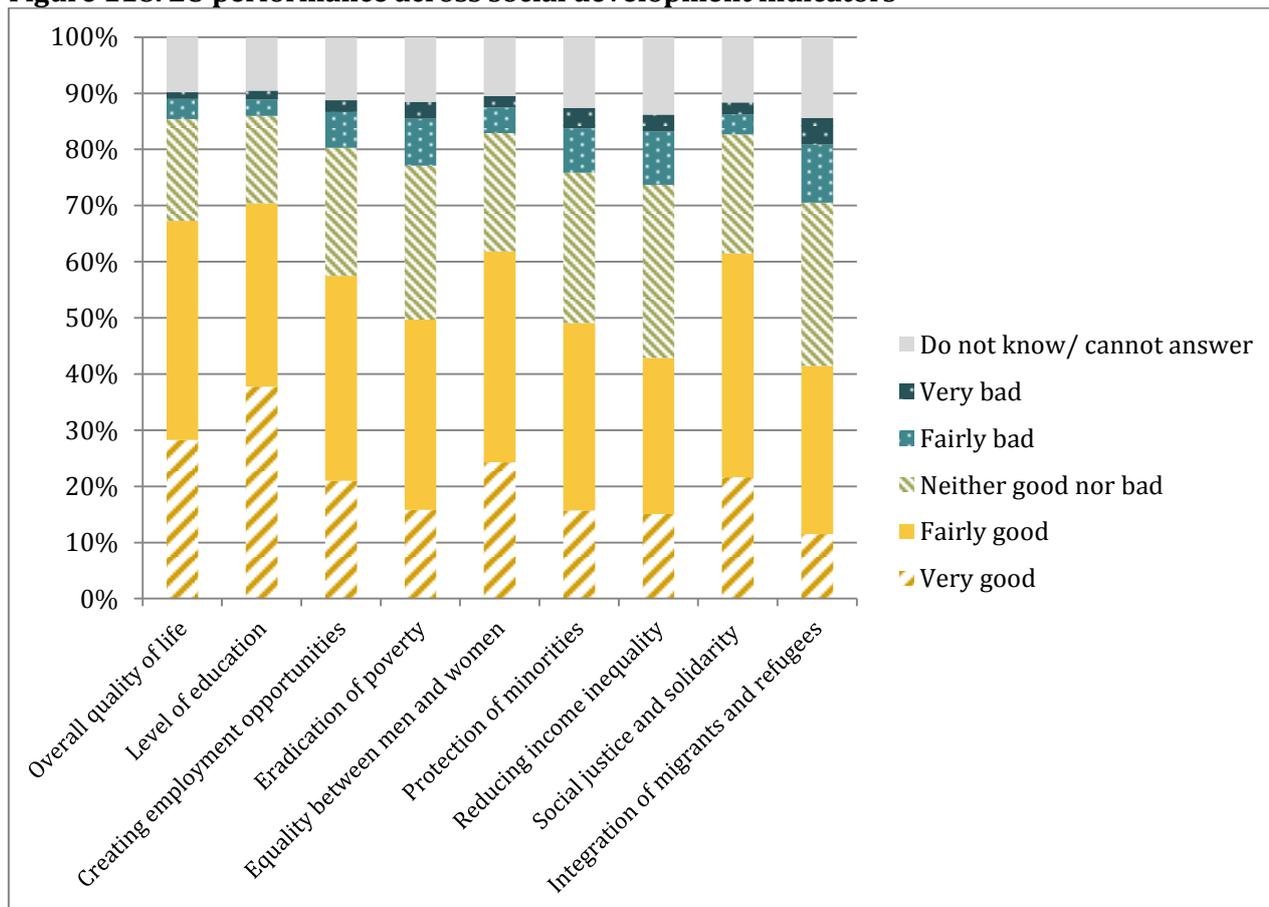
Development (social internal and international)

Consistent with the shocking but empirically verified finding from more than two dozen perception studies conducted in the last decade, *media* interest in reporting the EU's development activities was close to zero. There were no EU stories in the development frame; the *Business Day* had just one article in which Europe in general was broadly referred to as a development aid donor. Why there is this disinterest from a country with such challenging development issues requires further explanation and could be a key target for better EU Public Diplomacy.

In this context perhaps it is surprising that the *public opinion* respondents only considered the EU as being less important for development than the US or the UN, with most somewhat agreeing that the EU plays a more important role in this area than the World Bank and any of the countries used for comparison. An effected local government *elite* interviewee commented on the low visibility of EU development assistance: 'they probably don't actually do projects... they actually do more policy development... maybe at provincial and maybe at national level. But then also I'm not seeing a lot of that implementation, if it comes through, being advertised.' Lastly, the familiar complexities created by parallel Member State activities were noted: 'the UK's Department for International Development (DFID) for example has been funding lots of projects in South Africa for years, and it continues to do so.... Germany, for example has a whole range of funding agencies [Friedrich-Ebert Stiftung and Konrad-Adenauer Stiftung]....those are the two countries who I am aware of their support programmes in South Africa'.

In terms of **internal social development** within the EU itself, South African *public opinion* respondents regarded the EU as performing fairly well in promoting social justice and solidarity. Furthermore, the EU's overall quality of life was among the most positively evaluated areas of social development (see Figure 118).

Figure 118. EU performance across social development indicators

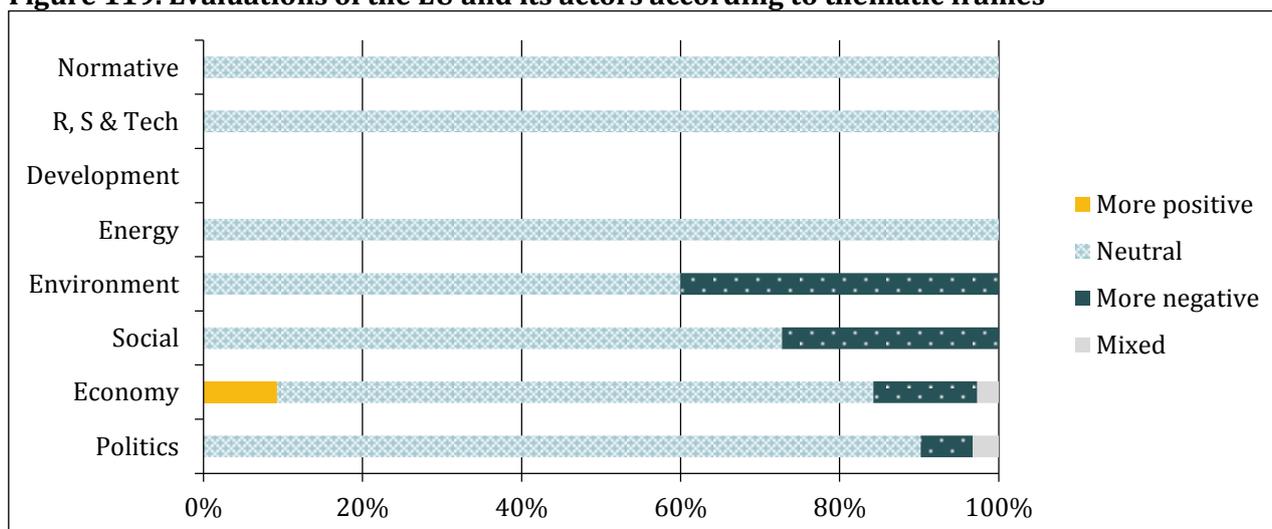


Note: Based on the answers to survey Q17: Generally speaking, how well do you think the European Union performs in each of the following areas of social development? (N = 1169)

Migration, multiculturalism and human rights

In the *media* analysis, within the EU social and cultural affairs frame an overwhelming majority of EU news was related to Mediterranean migration. A broader pattern was identified in the Europe dataset’s social and cultural affairs frame. *The Star* primarily reported on the FIFA corruption scandal that occurred in June. *The Times* and *Business Day* had no specific dominating sub- frames beyond migration (which was not limited to the Mediterranean situation) and an increase in the history sub-frame which can be attributed to the World War II celebrations that took place in May (Figure 119).

Figure 119. Evaluations of the EU and its actors according to thematic frames



Note: As there were no articles on development in South Africa’s EU dataset these theme received no evaluation.

The *public opinion* survey contained several questions on more specific human rights issues. Results show that in South Africa the EU’s dealing with refugees (and displaced people) was seen as less positive when compared to the overall fairly positive evaluation of the EU’s performance in other fields. This area clearly stands out as the one that respondents least often evaluated positively. The EU’s performance in integration of migrants and refugees was also seen least positively among other areas of social development. For comparison, respondents evaluated the EU’s performance in gender equality as the most positive among other human rights related issues listed in this survey question. Overall, South African respondents saw the EU’s performance in the field of promoting and defending human rights worldwide similarly to how it fares in social development, with the main competitors in these areas being the UN and the US. The role of the other countries used for comparison was seen as substantially less important.

Again, *elite* interviewees provide some colourful quotes, whether representative or not. In the words of an Ambassador:

‘we in South Africa, we have a deep seated admiration for the moral values of the EU and the way they have organised their societies – the social democracy approach, looking after the poor, the social programmes. We aspire to have something similar. But that interaction, on that level is sometimes difficult because we tend to react negatively when any EU member talks to us about that because we think they’re talking to us like they talk to children. They talk down to us... it’s not always positive simply because they tend to make up their own minds do what they think should be done and it’s not coordinated properly.’

Environment and energy

In *media*, in the EU environment frame there were very few stories, with the majority being within the internal sub-frame. This is an important observation because it once again highlighted that EU news focused on internal European events rather than locally or in a third country. The EU energy frame had just one story from the *Business Day* on Russia’s gas supply to the EU. There were a number of articles in the *Business Day* that focused on the

political nature of EU energy relations with Russia and China, two of South Africa's BRICS partners.

In the Europe dataset there was just a single environment article placed – the effect of pollution on longevity – published in *The Times* and none on the topic of energy.

The South African *public* equated the EU's role in fighting global climate change and protecting the environment similar to how Europe's role in maintaining global peace and stability was perceived. In this field the EU slightly lags behind the US and the UN. For South Africa, protection of the environment and the fight against climate change were not among the fields in which the EU was seen as distinctive. Moreover, South Africans see the EU's performance in green technologies similar to that of other economic activities and other specific fields of technological development. Europe's credibility in this area was higher amongst the interviewed *elites*, and the EU was mentioned supporting renewable energy projects in South Africa, although its effectiveness in promoting environmental issues in South Africa was questioned.

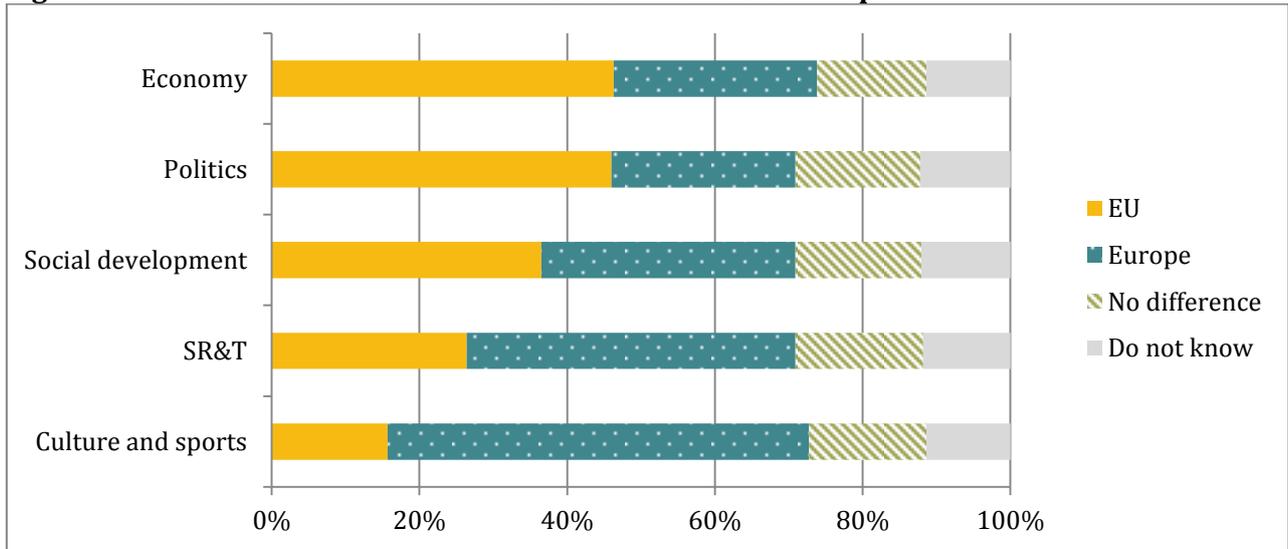
Research, science and technology

There were two EU **research, science and technology** articles from *The Star* in the research, science and technology *media* frame, showing a human-interest tendency of the paper as neither article impacted on South Africa in any profound way. In the Europe RS&T dataset there, technology stood out as the dominant sub-frame (with nine stories). *The Times*, in articles categorized as human-interest stories, had the most mentions (which were mostly about space advancements).

In the field of innovation and technologies the South African *public* considered the EU lagging behind the US, Japan and China. Although South African respondents view the EU's RS&T progress similarly to that in other areas, significantly they saw rival countries as much more important than the EU in this field. Despite of the overall reserved view on EU's global importance in this field, respondents felt the EU performed fairly well across the various fields of technology, as well as science and research. The elites generally noted that the EU was already visible in RS&T but could do more to assist South Africa (such as the co-funding support given for a Telescope in the Karoo).

In terms of how respondents differentiate EU and Europe, RS&T together with culture and sports were associated first and foremost with the term Europe, whereas economy and politics were firstly associated with the EU (see Figure 120).

Figure 120. Association of different areas to the EU versus Europe

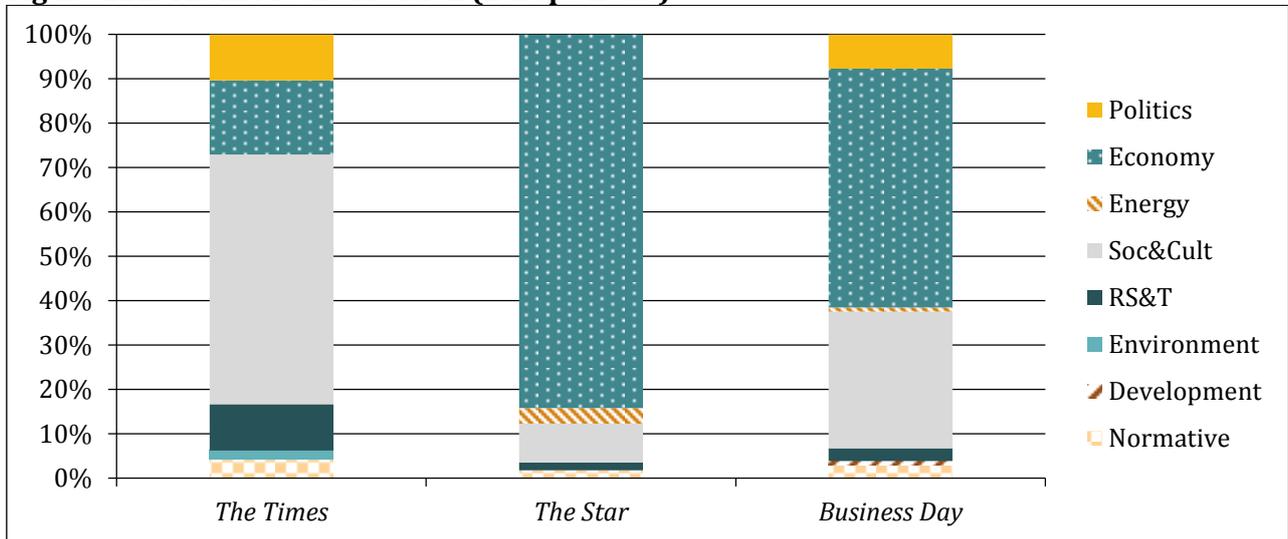


Note: Based on the answers to Q23: Some people think about Europe, whereas others think about the European Union when talking about economy, politics, culture, sports and other areas. In your case, which term – Europe or the European Union - comes to your mind first when you think about the following subjects? (N = 1169)

Culture

Whether the South African media truly sees the EU and Europe as a cultural desert is a moot point: however in terms of *media* reporting only two stories about culture appeared in the three months of analysis – both in the Europe dataset and both concerning popular entertainment (Figure 121).

Figure 121. Thematic distribution (Europe news)



Confusion – or disinterest – marked the *elite* interviewees’ comments: it was described as both the second most important area that the EU operates in, and as one of the lowest thematic areas for the EU. The *general public*, however, seemed to have a clear view: when compared to other countries EU Member States were seen as particularly attractive for their culture and lifestyle. Even though respondents evaluated all areas related to European culture very positively, they were more likely to choose luxury goods and clothes, lifestyle, food and cuisine, over music, arts, theatre and cinema. These opinions are in line with those

on the EU's performance in the entertainment industry, which was evaluated less positively compared to other economic activities. In relation to other questions, respondents were less likely to agree with the statement that Europe was a producer of music and arts popular in South Africa.

Education

It was not just culture that slipped below the journalists' radar: the South African *media* was as equally disinterested in reporting either EU or European educational stories. Only two stories appeared, both referencing 'Europe' rather than the EU. While shocking from a Eurocentric position, it should not be surprising that the EU's Erasmus programme (and the EU Delegation in South Africa) were the least known images describing the EU listed in *public opinion* survey, even if the EU was seen as an important partner for South Africa's educational exchanges. At least the South Africa respondents viewed the EU positively in terms of the level of education of its own population, the area of social development where the EU performed best.

Being economical with the truth was a reason given by one academic interviewee to explain why education was not emblematic of the EU in general in South Africa: 'the European Union can help them all they want but then the South African government would have to come out and say this is joint venture between us and the European Union' something that the interviewee thought was far from certain. Nonetheless, education (and healthcare) were regularly mentioned by the interviewees. The provision of scholarships to the EU was seen as particularly effective by one think tank interviewee: 'I would say that it is effective or that it's delivering positive outcomes because I know many scholars who have taken up the scholarship and are studying in EU institutions so in that way there's positive human capital in that.' However, as a civil society interviewee countered: 'if they want to make a contribution to sub-Saharan Africa, the issue is not in tertiary education the issue is in making sure that enough kids get to matric with a qualification that will give them access to tertiary education.'

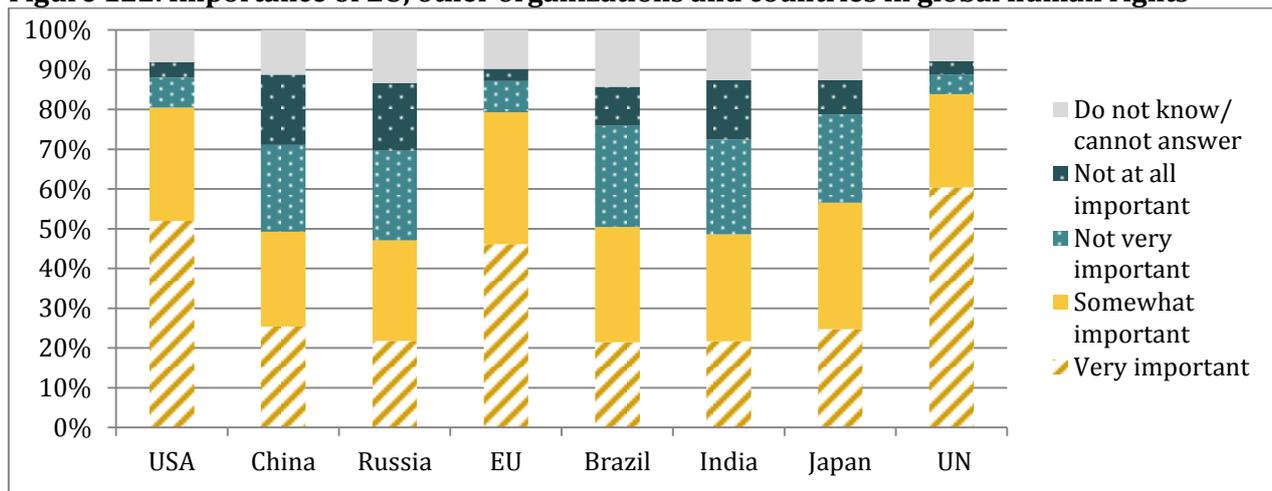
The EU as a norm-setter

In the *media* analysis politics and economy were the only two areas where the EU was defined as a normative actor. They were characterized by sub-frames of peace, human rights and rule of law, which were largely reflected in articles where the EU was operating within Africa (typically in relation to countries where EU sanctions were in place such as Russia and Zimbabwe); confronting technological giants such as Google and Facebook (which the EU deemed to threaten the normative rights of EU citizens); or promoting new EU legislation on the trading of clean minerals from Africa. Once again, it is important to note the EU is not reported as a normative actor or having normative influence within South Africa, but rather reporting focused largely on third countries or globally. Furthermore, the majority of articles that dealt with sanctions also expressed normative justifications for their imposition, either due to breaches of human rights (which was the most used normative frame in relation to the EU) or due to moral reasoning, such as in the case of Iran. The fact that there were a limited number of stories within the normative frame is largely due to the absence of any analytical journalistic culture in South African newspapers. It seems a conclusion that can be safely drawn is that the EU is not generally seen as a normative actor in South Africa.

In the 'Europe' dataset human rights and rule of law were also present (as in the EU dataset); however the third most visible topic was anti-discrimination and linked specifically to articles that discussed racism and discrimination towards migrants in Europe, creating negative perceptions of the values practiced in Europe.

In terms of *public opinion* in South Africa, respondents saw the UN as the most important actor in the field of promoting and defending human rights worldwide, although the EU together with the US clearly led the poll in relation to other countries and organizations besides the UN (Figure 122).

Figure 122. Importance of EU, other organizations and countries in global human rights



Note: Based on the answers to survey Q10: In your view, how important a role do each of the following countries or organisations play in promoting and defending human rights worldwide to protect human dignity, freedom, equality and solidarity? (N = 1169)

If the EU's normative content was largely ignored in the media, the few South African *elites* interviewed had strong opinions. One commented: 'you do see them having a very strong line on norms and values within... and I think most northern Europeans because of the universality, because of the basic declaration of human rights, because that's entrenched in people's thinking - that is the normative value that's coming through' (local government official).

One academic offered a different interpretation, preferring to repeat the negative normative theme of self-interest: '[the EU] clearly don't have a good press officer in South Africa... It depends what their objectives are. I don't necessarily think that ... their end goal is to help us, they're acting in their own interest... good is certainly being done, but I don't think that balances out really, and I don't think people are very aware of it, people don't really know what these objectives are.'

Perhaps more encouragingly, a local government interviewee commented: 'there are definitely humanitarian objectives, they do exist. And they are pursued definitely but I would say... to the extent that it's a sort of a moral thing, you know feel good we're saving you guys from your terrible presidents or your cursed land or your drought, or your water shortages or whatever you know, I don't think there's a genuine intent to actually improve the capacity of the people in this country because that's bad for business overseas, it's just... you can't have both.' The notion of a normative dialogue between equal partners was seen as being absent.

3.8.4 Local conditions: explaining the perception of the EU in South Africa

Perceptions are a result of interactions between internal (South Africa-specific) and external (EU-specific and global) factors. There are several possible explanations for the profile of EU images and perceptions in South Africa. The following analysis is based exclusively on the elite interview data.

History was mentioned regularly in the interviews, although this proved to be something of a mixed blessing: it was cited as an obstacle, but also as something that links South Africa to Europe in a special relationship. Unavoidably, perceptions due to specific historical legacies exist, and foremost amongst these was the impact of colonialism. The positive effect was an awareness of a better life, a sense of admiration of Europe as a beacon of civilisation; negatively this can be viewed as indoctrination that Europe is better. The EU was taken as a symbol of the west and as such has to confront South Africa's social and political movements that are anti-colonial and anti-imperial and therefore anti-west. The extent to which these views were just political rhetoric was raised and as expressed in one interview any such 'historical grudge' does not necessarily affect the relationship. More recent interaction has seen the EU increasingly gain the trust and respect of South African business meaning that they are more likely to trade with them than other countries. Future studies of the EU in South Africa could look at various discourses that shape the historical narratives (e.g. school textbooks) and images of Europe in them to offset modern-day images of the EU.

Culture was mentioned specifically in relation to how South Africans relate to Europeans socially. The similarities in culture were discussed, however this was not seen as having an impact on the openness of South Africa to the EU, but was rather something that related to individuals.

Education was the underlying policy area that was discussed. Elites that had the chance to study in the EU are seen as having socially a more positive perception of the EU due to their time living and interaction with the EU. Academic elites in general by virtue of their education are seen as viewing the EU in a positive light. Future studies of the EU in South Africa could assess images of the EU of the returnees from the EU Member States (e.g. students who returned from their exchanges in the EU) vs. those who those who did not spend time in Europe in a systematic way. Sojourners are argued to be a valuable resource for EU Public Diplomacy.

Political context was a much more subtle theme, focusing on the similarities between the South African legal and parliamentary system and the UK's, and the models of development and governance that the EU provided for South Africa. A repeated assertion was that South Africa was no longer a priority for the EU in terms of aid and bilateral relations and that South Africa was experiencing a surge of Afrocentrism – key factors that affect the current and future relationship. Additionally, where policy decisions are taken by individual Member States that affected SA negatively, a negative light is cast on the whole Union.

The social context plays an important role. There are large Greek and Portuguese communities in South Africa, creating linkages with the European continent and generating a degree of interest in the news from that part of the world (most of which, of course, was rather unfavourable in 2015). Future studies of EU perceptions in South Africa could systematically study the images of the EU among the diasporic communities. Diasporas are

another valuable resource for the EU Public Diplomacy. The highly fragmented language nature of South Africa's language groups means that most citizens do not engage with the English language media. Future studies of EU images in South Africa could analyse multilingual news media in South Africa.

3.8.5 Recommendations for EU Public Diplomacy

The public most commonly described the EU as *strong, modern* and *multicultural*; and least often as *aggressive, arrogant* or *hypocritical*. This is in line with the positive general view of the EU as well as the positive assessment of the EU-South Africa relationship. Interestingly, the EU led in the use of the adjective *trustworthy*, and was behind only the US in being described as *united*; the EU was least often described as *aggressive* in general. Unsurprisingly, there was a high correlation between those with a positive general predisposition towards the EU and those who chose positive adjectives. Regression analysis shows that the likelihood for respondent to have a positive overall view on the EU is somewhat lower for respondents with a higher age. Older respondents are also somewhat less likely to have positive view on EU's relationship with South Africa. They are also less likely to give positive evaluation of EU's performance in various fields. Positive perceptions (and especially among the younger generation of South Africans) provide a fertile ground for EU Public Diplomacy in South Africa. This finding is also the inverse for Japan and Korean respondents (where older age was positively correlated) underlining the point that Public Diplomacy is not a one-size-fits-all approach and must address local conditions and nuances if it is to maximise effectiveness.

The country's elites have a different opinion of the EU/ Europe. The main perception was one of appreciation, but also caution due to political sensitivities. Here, the history of colonialism makes South Africa's political elites wary of European motives. Political sensitivities at an upper level of engagement need to be managed so that they do not filter down adversely to the social level and undermine the perceptions the broader public has of the EU. Education seemed to correlate strongly with the most receptive elites. Students who benefitted from EU educational assistance had a sense of assimilation with European culture.

The communication deficit needs to be prioritised. South Africans seem relatively unaware of the EU's presence and its work in South Africa. While hardly a startling new revelation, a concerted and targeted approach to the mass media is fundamental to creating better awareness of the EU in South Africa. Obviously there needs to be an impact evaluation mechanism in place and the media methodology presented in this report should be used as the common assessment template.

Making the EU more relevant and attuned to South Africa's human needs is a further recommendation. This involves having a more partnering approach and a less technical one that can help South Africans on the ground through involvement in policies that affect the lives of ordinary South Africans. Simply, the recommendation is that the EU needs to move beyond being just an entity that funds and become more engaged with South African projects that address the core needs of the people. Consequently it was felt that those projects with which the EU engaged should be informed from the grass-roots and not top-down: to achieve this Delegation staff need to understand and engage with South Africans more visibly. More

generally the EU should engage more in the public discourse to create opportunities for debate where it is involved.

'South Africa will always view the EU and Europe with suspicion.' This provocative statement from an interviewee touches again on how best to communicate the reasons behind the EU's involvement that go beyond self-interest. Too often the EU was criticised for being condescending in its approach instead of partnering with local actors to achieve change. The litany of complaints followed a common theme – the EU's prescriptive approach; a lack of confidence in South Africa as a competent partner in solving problems; reluctance to consult South African professionals; and that projects are funded that suit the EU and are not always coordinated with local initiatives. Thus the recommendation is to heed the words of another interviewee: 'show more compassion, instead of obligation and become engaged, instead of prescribing.'

As a regional leader and a middle-income country, SA is less interested in development aid and more keen to engage with the EU on an equal footing. There is a need to ensure that EU's policies, from trade to scientific cooperation and political dialogue, are coherent and do not undermine South Africa's development needs.

Another recommendation that emerged from the interviews was for the EU to be less ambitious and more modest in scope. Instead of trying to be all things to everyone, the EU should focus on key areas and thus become more visible at least in some sectors.

Enhancing credibility is also a related recommendation. The EU was encouraged to show competency in dealing with its own internal situation before trying to help the rest of the world deal with theirs. Greater modesty in this case would be a virtue and a recommendation.

Who then should the EU focus its attention towards? Critical partners for the EU's Public Diplomacy in South Africa would include grassroots NGOs working on local economic development. One of the EU's comparative advantages is its long history of cooperative welfare and high living standards. In this regard, the EU should focus more on supporting local cooperatives (also facilitating partnerships between European groups and their South African equivalents) in fields as varied as organic farming, renewable energy production and environmental sustainability. A key partner in this area would be the South African Organic Sector Organisation (SAOSO), which works at the intersection between environmental policy, food production and land reform (three critical issues in South Africa), and the South African National Apex Cooperative. In a similar fashion, the EU has much to gain from interacting with South Africa's small business groups, thus building on Europe's long tradition of local level economic activities. In this regard, the National Small Business Chamber would be a valuable interlocutor. Importantly, relatively few local actors were mentioned in the media coverage. This was largely due to the fact that most articles were not about bilateral EU-South Africa relations. Beyond a single incident involving Spain and South Africa's citrus fruit farmers, the EU is only mentioned interacting with South Africa in articles in passing without much detail of the partnership between the two.

Social enterprises are mushrooming across South Africa, with major potential impacts on the country's development trajectory. The EU should carve its space in this sector, supporting social innovation platforms, incubators of promising initiatives and opportunities for social

entrepreneurs to connect. Critical partners in this regard would be universities (e.g. the Gordon Institute of Business Sciences), but also hybrid formations like the Innovation Hub, JumpStarter (a social innovation network) as well as the Department of Economic Development. In the field of basic education, an association like Partners for Possibility has significant potential.

Think tanks and universities are also critical to help the EU strengthen its public image in the country and more involvement of EU officials in public debate, media discussions and other outlets is to be welcomed. Key targets in this area would include the Centre for the Study of Governance Innovation at the University of Pretoria, the European Union Studies Association of Sub-Saharan Africa, the UNESCO-UNU Chair in Regional Integration, Migration and Free Movement of People, the Institute for Global Dialogue, the Sustainability Institute, the Mapungubwe Institute for Strategic Reflection and the Institute for Security Studies.

Recommendations for EU Public Diplomacy from practitioners on the ground in South Africa

From the perspective of practitioners at the EU Delegation on the ground there are four areas where EU Public Diplomacy should concentrate its efforts. First, a comprehensive EU Public Diplomacy strategy must take into account regional and local specificities. Second, EU Public Diplomacy activities in South Africa must continuously assert the fact that Europe is no longer a colonial, oppressive power. Third, a more humble approach by the EU and its representatives is necessary to avoid the accusation of arrogance. Fourth, mixed outreach approaches aiming at specific target groups as well as the general public should be further enhanced in order to broaden outreach: cultural activities pose a good platform in this regard.

3.9 South Korea

This country chapter presents a synthesis of the Korea-specific findings of media analysis; elite interviews and public opinion poll that were all conducted in the framework of this study. The chapter follows the logic of the research design with the main findings structured according to the common research criteria – visibility, actorness and local resonance; and norm-setter. For actorness and local resonance, these are discussed in keeping with the themes analysed in this research: economy and trade; politics and security; normative and human rights; development; migration, multiculturalism and human rights; environment and energy; RS&T; culture; and education. The local conditions that help to explain the perception of the EU in Korea are presented and the chapter concludes with recommendations for Public Diplomacy, including a subsection on recommendations in the eyes of practitioners based at the EU Delegation in Seoul.

3.9.1 Sample

Public opinion

The online omnibus survey was coordinated and analysed by the Public Policy and Management Institute (PPMI) and conducted by TNS Global. The respondents in South Korea were surveyed in Korean. Data collection took place in August 2015. The online omnibus survey was designed to be nationally representative with regards to age, gender and region. The survey covered a total sample of 1238 individuals within the 16-64 age group.

Media

The media content analysis was designed, supervised and coordinated by the National Centre for Research on Europe (NCRE), University of Canterbury, New Zealand, and conducted by local researchers trained by the NCRE. Two popular prestigious papers *Chosun Daily* and *Joongang Daily* and the business newspaper *Maeil Kyungje Shinmun* were monitored daily between April 1 – June 30 2015 using e-search engine Press Display to ensure high accuracy in data collection. Two separate datasets were collected over the period of observation – ‘EU’ (340 articles) and ‘Europe’ (929 articles). Key search terms for dataset ‘EU’ included (with acronyms) ‘The European Union’, ‘The European Commission’, ‘European Parliament’, ‘European Court of Justice’, ‘European Central Bank’, ‘European Presidency’, ‘Council of the European Union’, ‘Eurozone’. The key search terms for dataset ‘Europe’ were ‘Europe’ and ‘European’.

Elite interviews

The NFG coordinated the interview programme and designed the questionnaires in close coordination with the Country Experts and the project partners. The NFG was also responsible for the training of the Country Experts and supervision of the implementation of the interviews. The interviews themselves were conducted by the Country Experts. Interviews have been conducted as a source to identify upcoming trends and to cross-check findings. They are non-representative due to their current scope and should be considered as a tool for future evaluations in a representative volume. The NFG chose a three-phased approach: in Phase I, two transcripts were due until June 6; in Phase II, five interviews were due until July 15; and in Phase III, five interviews were due until August 17. The NFG was in charge for the coding of the transcripts and the provision of the results to the project partners.

The interviews in South Korea were conducted in Korean and translated and transcribed by the Country Experts. They interviewed 11 experts (Policy-makers (3), Business (2), Academia/ Think Tank (1), Civil Society/ NGO (3), Media (2)) and held one group interview with 16 BA students from the Korea University.

Semi-structured, anonymous qualitative interviews under Chatham House Rules were conducted with all EU Delegations across the 10 Strategic Partner countries, primarily in the form of a group interview. The groups included Heads/ Deputy Heads of Delegations, Heads of Press and Information Section and/ or Heads of Political Affairs Section. Interviews lasted between 60 to 90 minutes. In South Korea three diplomats were interviewed.

NB: two robust datasets collected in the course of public opinion survey and media monitoring allow for quantitative and qualitative analysis of data (for more detailed information, please see attached country-specific media and public opinion reports). Survey of elite opinion is impressionistic due to small numbers of the interviews. Data collected is analysed using qualitative approach.

3.9.2 Visibility

The most striking *media* highlights listed below detail aspects of the level of the EU's and Europe's visibility in South Korea in influential opinion-making discourses.

Concentrating first on the EU dataset (totalling 340 articles) the business newspaper *Maeil Kyungje Shinmun* published more EU-related articles than the two dailies *Chosun* or *Joongang*. Most articles were of medium length written from a major perspective and placed in the main section of the newspapers. These outlets were inclined to provide visual aids (photos, graphs and maps) for their readers, with almost all articles written by 'local' correspondents rather than 'international' ones and all inclined to disseminate EU-related economic news items rather than political or socio-cultural ones. The most prolific EU news themes that were reported were the Greek financial crisis (in economic news), political actions within the Union's border (in political news), and the issues about refugees to Europe (in socio-cultural news). Generally, a neutral tone in reporting was dominant, although with evidence of more negative evaluations towards the EU in political and economic issues.

The 'Europe' dataset was significantly larger (929 articles). Europe news was published in the main section of the papers, but, typically just as a minor reference; local journalists were main contributors; evaluations were mostly neutral; and except for business paper, social affairs ranked first, followed by the economy and politics third.

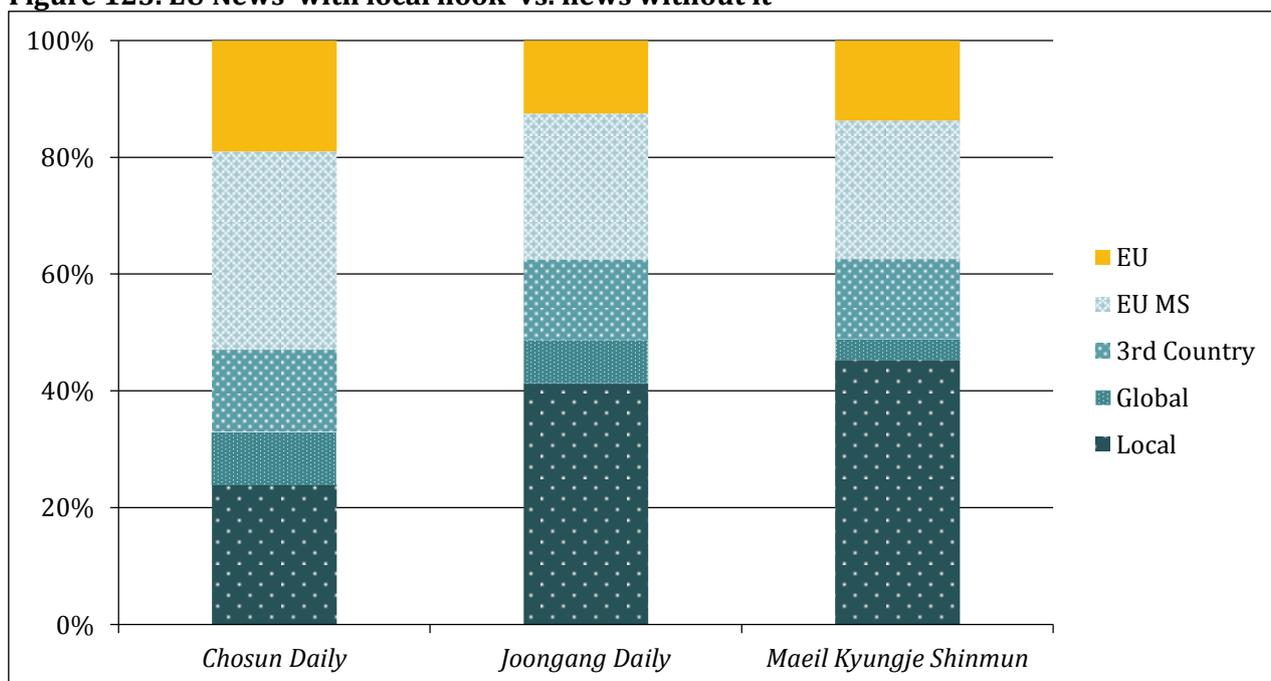
What then are the more nuanced levels of visibility underpinning these generalisations? In the 'EU' dataset the volume of EU coverage in Korea was moderate but greater than in the findings from previous studies. Given that international news space is always limited the EU's visibility might be considered relatively high in overall terms.

For placement, the majority of EU-related articles were published in the main/ overall section (Overall section for *Joongang Daily*, and Section A for *Chosun Daily* and *Maeil Kyungje Shinmun*). Although each media outlet had somewhat different placement categories, the important point is that EU-related news items were situated in relatively prime positions and the readers were more likely to have read these items. However, most of the EU articles were not published on the first page of these newspapers. In terms of the *length*, all three

news outlets had the highest proportion of articles that were *medium* length. The 929 articles in the ‘Europe’ dataset more than doubled that of the EU dataset. For placement, nearly the half of Europe-related articles was published in the main/ overall section, a similar distribution as for EU-related articles. As was the case for EU articles, most Europe articles were either medium or long in length.

Turning to the predominant institutional ‘face’ of the EU in the media, the European Central Bank (ECB) was ranked first, the European Council second, European Commission third, the European Court of Justice fourth, and only then the European Parliament. This trend reflects the reporting of the Greek financial crisis as a significant issue for the Korean media. In most news items about the Greek financial crisis, the ECB was presented as one entity of the Troika. For EU officials, Juncker was most frequently mentioned, followed by Draghi, Mogherini and then Dijsselbloem. For the Member States, Greece was the most frequently mentioned, followed in rank order by Germany, the UK, France, Italy, and then Spain. Within the articles about the crisis, Greece was frequently paired with Germany. Following this pattern, the leading Member State players were Tsipras, Merkel, Cameron, Hollande and in fifth place the then Greek Finance Minister Yannis Varoufakis (see Figure 123).

Figure 123. EU News ‘with local hook’ vs. news without it



In *media* analysis the degree of centrality is a concept which measures ‘the importance and intensity with which the EU was presented to the news audiences.’ Except for *Joongang Daily*, newspaper outlets had the largest proportions of their EU articles with *major* perspectives (Figure 124). *Chosun Daily* had the highest number and percentage of *major* articles. However, for *Joongang Daily* the difference between *major* and *secondary* news was not substantial. For the degree of centrality for the Europe dataset - and opposite to the results for EU news - the three newspapers had the largest proportion of the articles with *minor* perspectives (Figure 125). *Chosun Daily* had the largest number of news items with a minor perspective, while *Joongang Daily* had the largest percentage of articles with *minor* perspectives.

Figure 124. Degree of centrality (EU news)

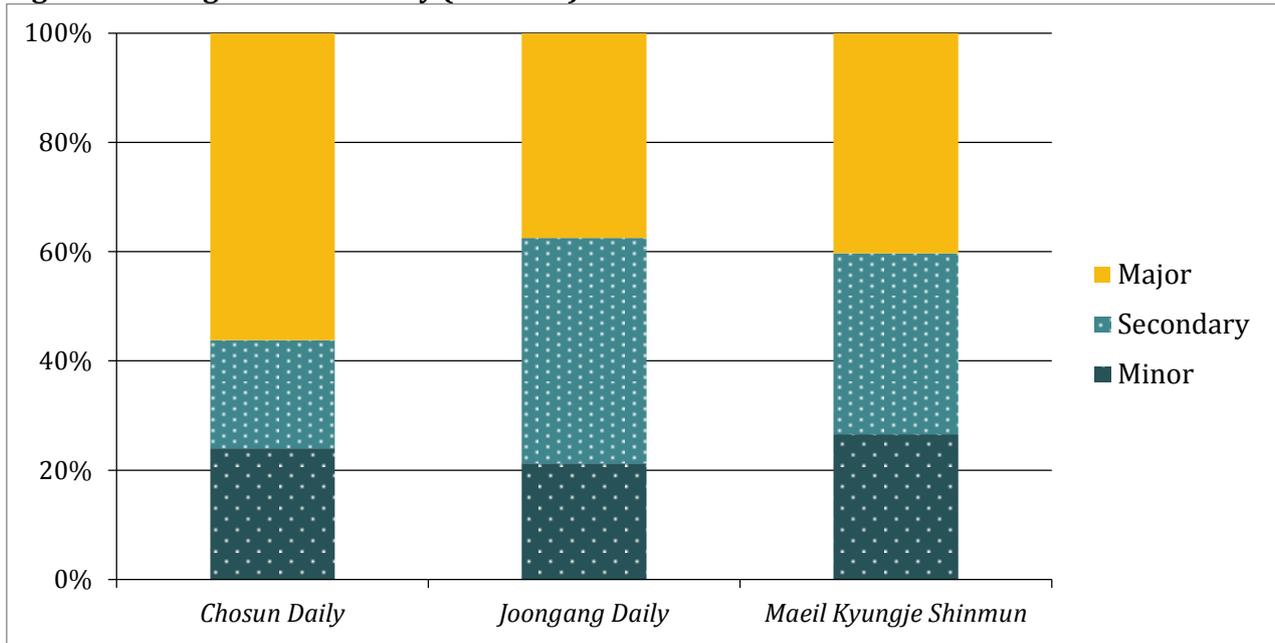
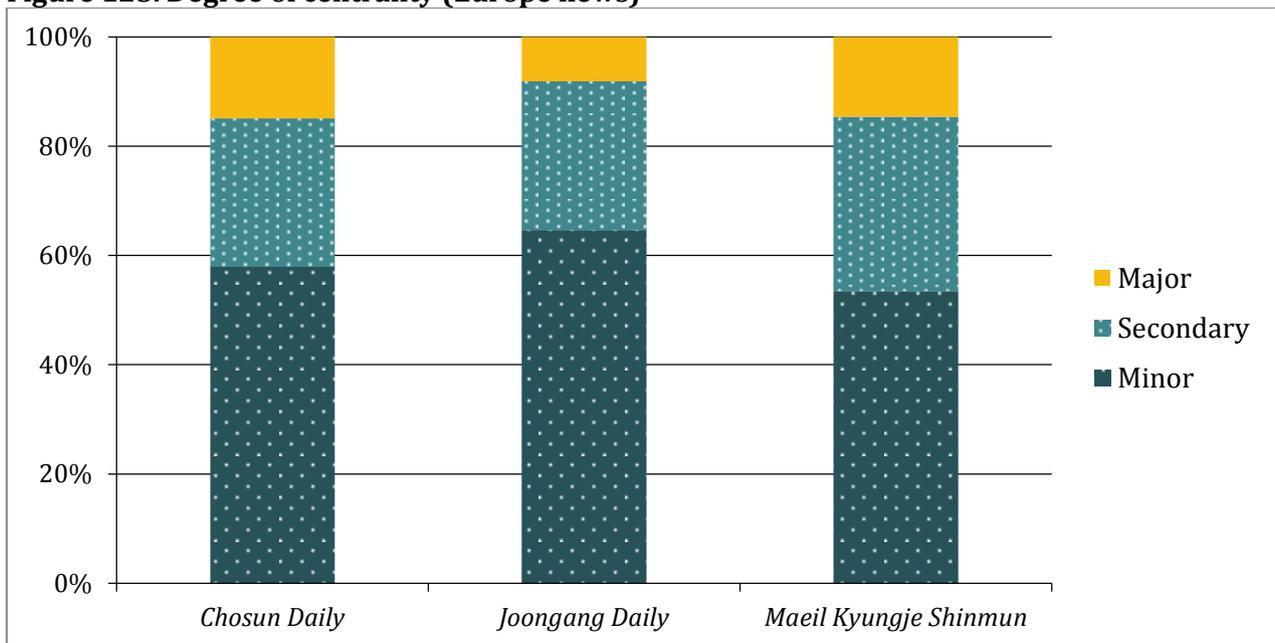
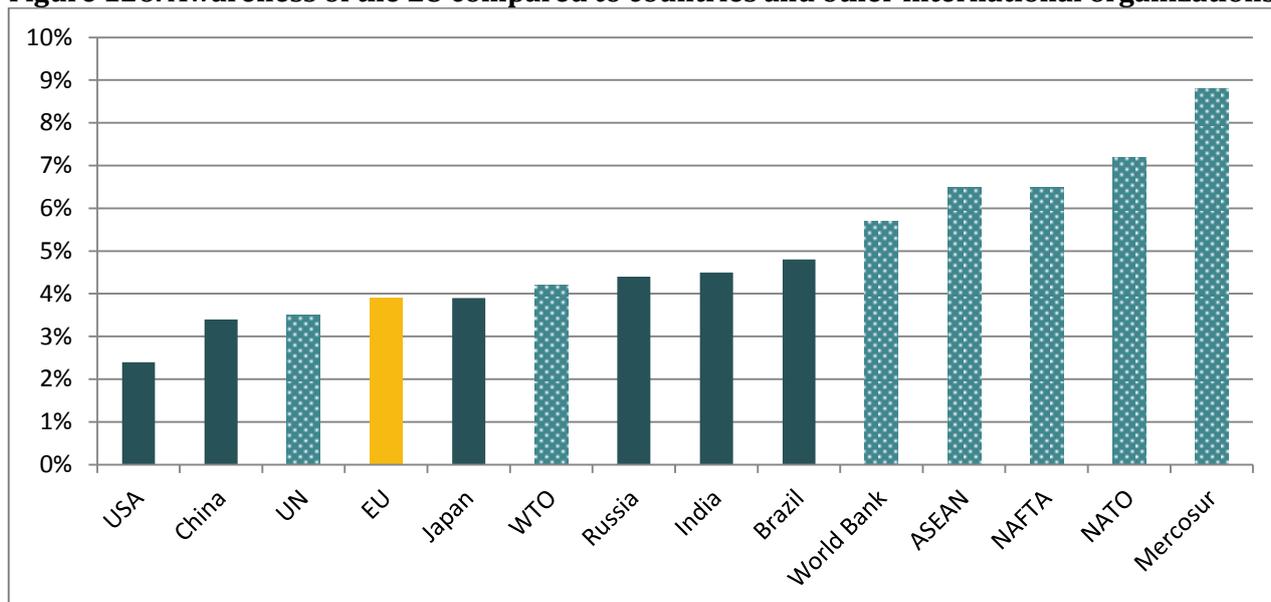


Figure 125. Degree of centrality (Europe news)



The overall visibility of the EU among the *general public* was similar to that of the countries used for comparison and the same as Japan (and below only the US and China), while it was more visible than all international organisations except the UN (see Figure 126). Korean public opinion expressed a positive view towards the EU’s leadership in world affairs (indeed it was seen as desirable and ranked only just below the US), but the EU lagged behind the US and China in terms of how respondents gauged the likelihood that such a role would develop in the future. In South Korea, most respondents see the US to be a major player in world affairs in the future, with China a close second.

Figure 126. Awareness of the EU compared to countries and other international organizations



Note: Based on the answers of option ‘Do not know/ cannot answer’ to survey Q1: Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations? (N = 1238)

Public opinion related the EU’s visibility to tourism. South Korean respondents saw it as the economic field in which the EU performed best and generally saw Europe as an attractive tourist destination both personally and for South Korean tourists in general.

The *elite* interviews gave a flavour of those areas where EU visibility was the more pronounced: these included the EU-Korea FTA; Horizon 2020; the Protection of Diversity of Cultural Contents policy; Certified Emission Reduction; the Digital Single Market; ODA policy; welfare systems; education; Jean Monnet EU Centres; Executive trainee programmes. It was noted that both regional and field experts are needed and acknowledged the need to improve relations between EU and Korea.

3.9.3 Actorness and local resonance

The EU as a partner

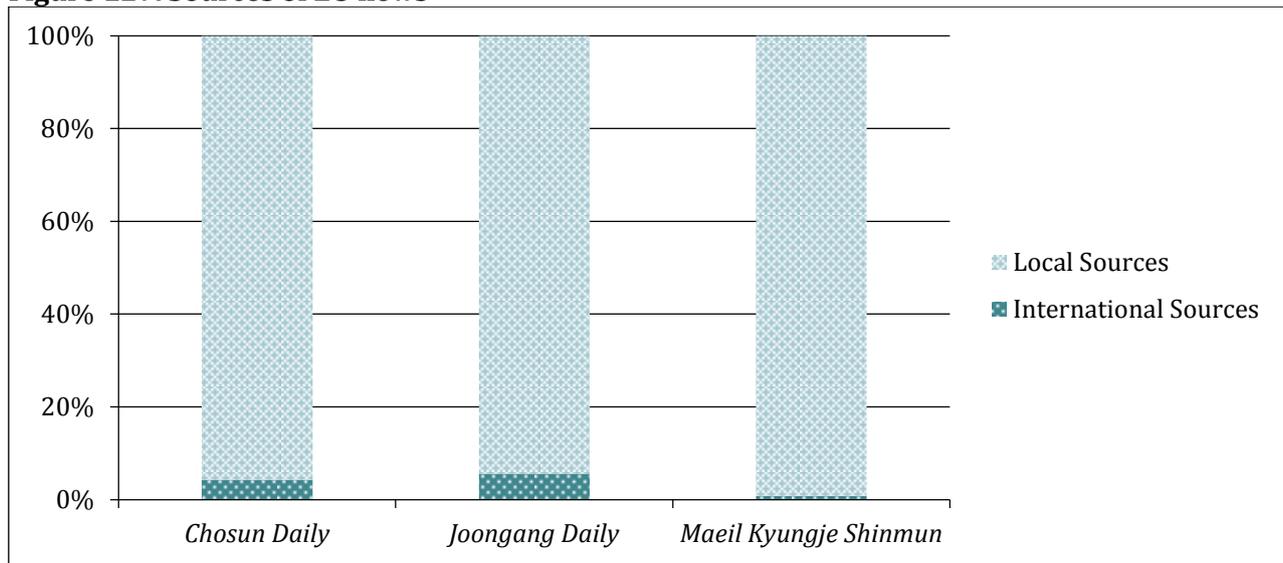
Two competing visions of local resonance were offered by the *elite* interviews. One from a civil society representative saw positive lessons: ‘especially in political aspect, EU political systems, such as the election system - Europe’s two-round system, parliamentary elections in the European countries, etc. - and welfare system can be good examples for South Korea.’ The undergraduate focus group were rather more negative: ‘no, because they are not getting any attention from people of my region. If they resonate with needs in my country, they will get more attention.’

In South Korean *public opinion* such areas as economy and politics are first and foremost associated with the EU, whereas culture, sports and science is primarily associated with Europe. This would suggest that in South Korea the EU is mostly seen as an economic and political union.

Who wrote the news is also a measure of local partnership. For both *media* datasets there was a great reliance on local journalists and international sources rarely used (Figure 127).

More specifically, in the EU dataset, most sources used by the three newspapers were local correspondents/ journalists. While none employed international wires, non-local correspondents were sometimes used. Most non-local correspondents for *Chosun Daily* and *Maeil Kyungje Shinmun* belonged to American institutes or media outlets and *Joongang Daily* used articles from journalists or contributors to *Rossiskaya Gazeta*. For visual images, EU-related news items of the three newspapers took most of their images from either AP or AP-Newsis (Korean news agency). The source for more than 90 per cent of Europe related news items of each news outlet were local correspondents.

Figure 127. Sources of EU news



Turning to the overall evaluation of EU actions, all three newspapers were more inclined to give *neutral* evaluations towards EU affairs (see Figure 128). Where a non-neutral tone was noted, a negative rather than positive evaluation towards the EU was apparent. For the major frames, all three newspapers had more negative than positive evaluations of the EU in economic and political frames (see Figure 129). For economic and political news items with negative evaluations of the EU, state of the EU economy and Brexit were the most prominent issues causing the three newspapers' negative evaluation of the EU.

Figure 128. Evaluation of EU actions

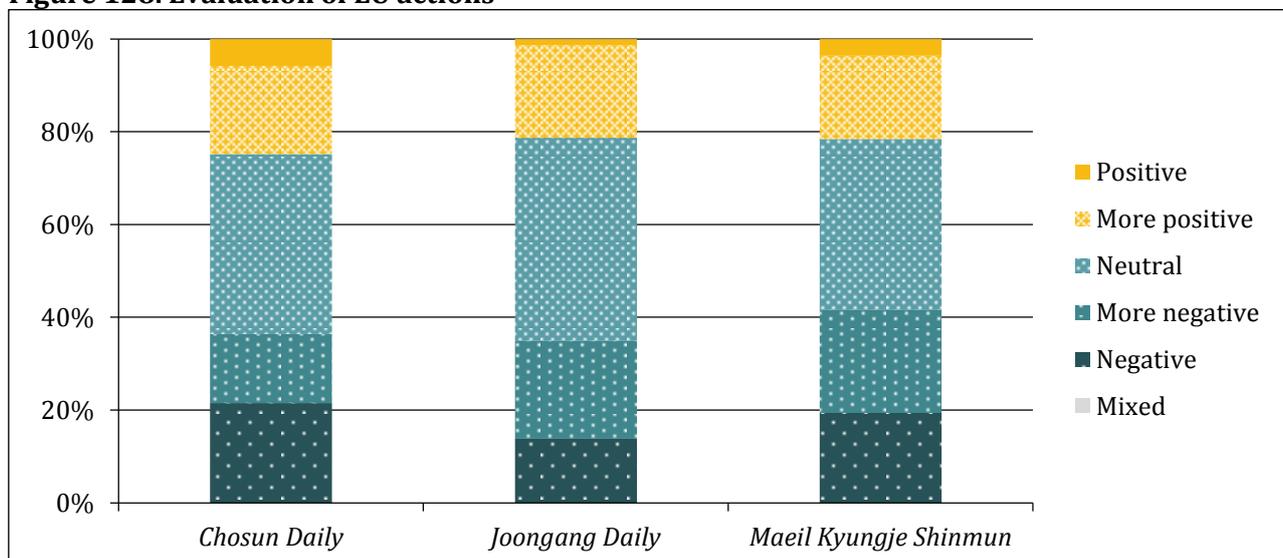
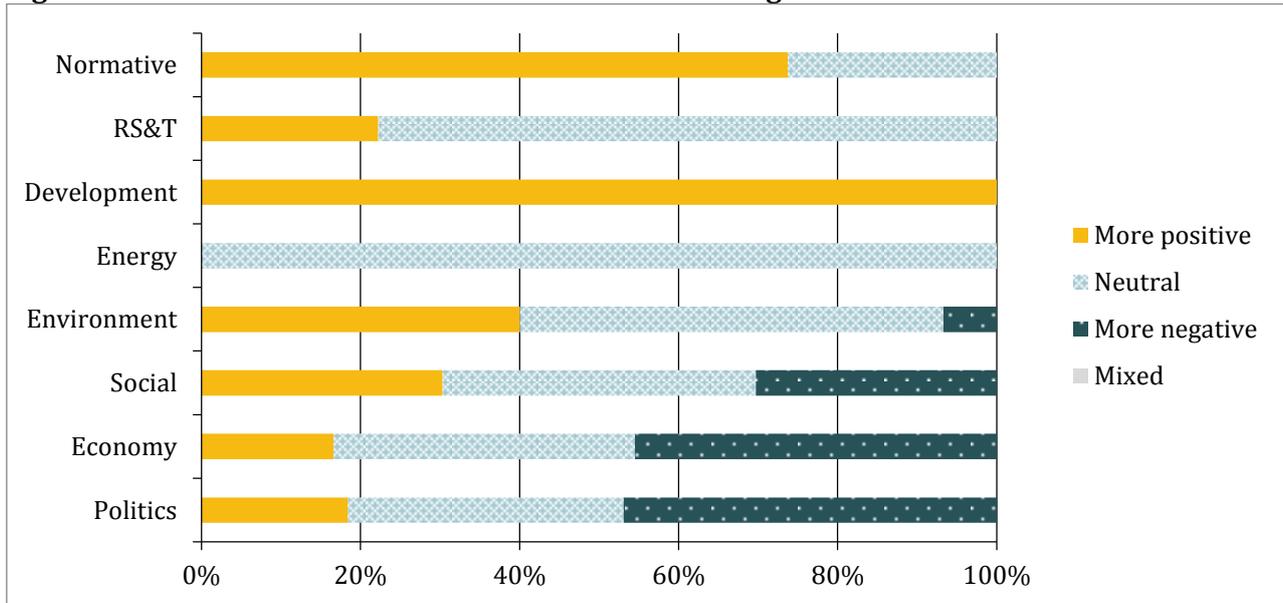
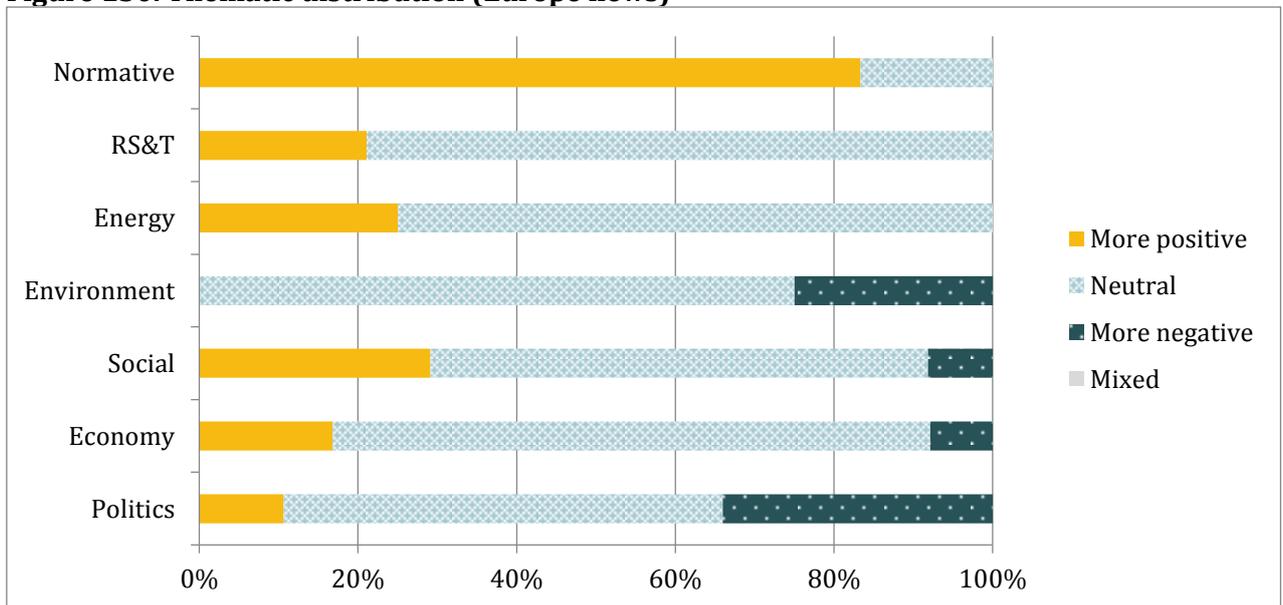


Figure 129. Evaluations of the EU and its actors according to thematic frames



Most collected news items in three newspapers employed a *neutral* tone when referencing Europe (see Figure 130). All three newspapers had more articles with positive evaluations towards Europe than negative ones. The major topics related to traveling to Europe when covering Europe-related affairs. Clearly, this prominent focus for news coverage impacted positively upon the evaluation to some extent.

Figure 130. Thematic distribution (Europe news)



Turning to *public opinion*, attitudes towards different Member States of the EU also helps to get an insight into what makes up the perception of the EU. In South Korea, France, Germany and the UK are seen as the most attractive Member States. Overall, Central and East European countries were least often mentioned as the most attractive. This question also demonstrates the visibility of the different Member States. The EU was typically seen as similar to the UN and WTO. Unlike in some other countries under study, there was no negative correlation in the way South Korean respondents viewed one country or organisation in comparison to another.

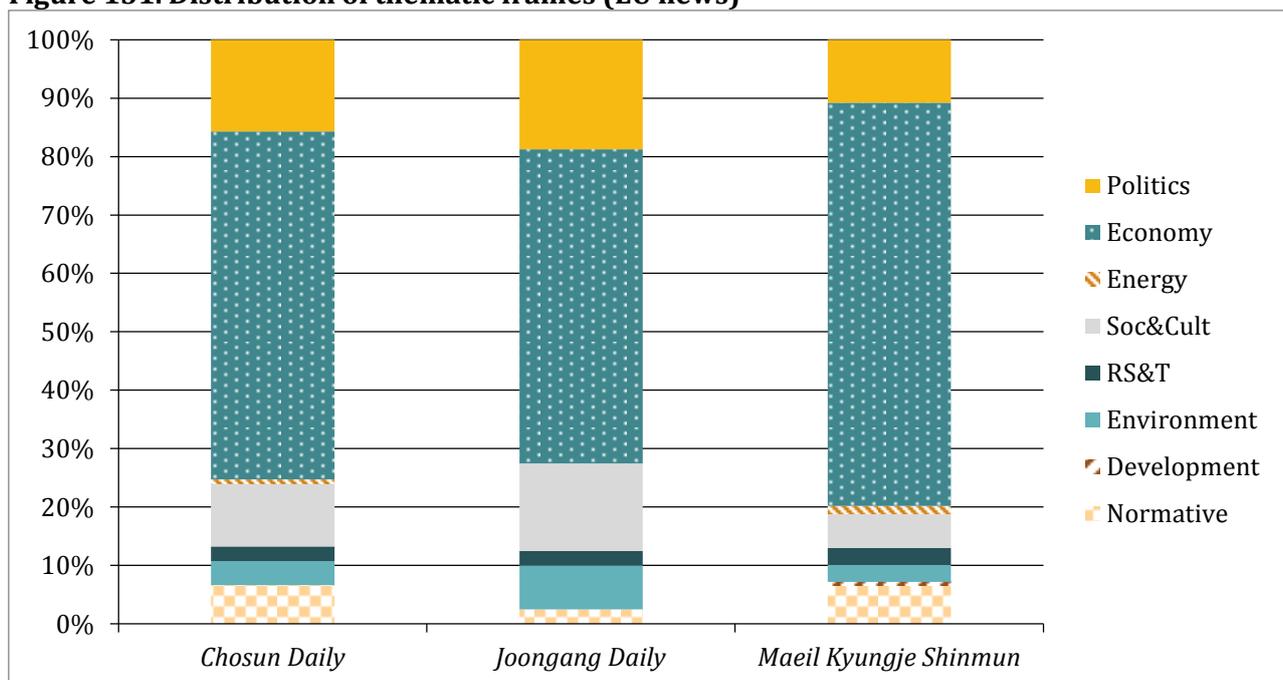
Just under half of the Korean *public* perceived the EU's relationship with South Korea to be predominantly good. The EU was most commonly described as *modern and peaceful*; and least often described as *aggressive, hypocritical* and *arrogant*. This is in line with the positive general view of the EU as well as the positive assessment of South Korea's relationship with the EU.

The same adjectives were used by South Koreans to describe selected countries, for example: the US was seen as slightly more *modern* than the EU; both were most often described as *efficient and trustworthy*; the EU led in the use of the adjectives *peaceful* and *united*, and was behind only the US in being described as *modern* and *multicultural*. The EU was least often described as *aggressive, hypocritical* or *arrogant* in general and also when compared to most other countries. Respondents with mostly positive attitudes towards the EU account for approximately half the population, with 11 per cent expressing very positive attitudes towards the EU; in contrast, 28 per cent of survey respondents professed mostly negative attitudes towards the EU.

Economy and trade

When the content of the EU news stories is considered the majority of EU news items fell into the economy, politics and social affairs frames (Figure 131). In economic framing, the top three visible sub-framings were 'State of Economy', business/ finance and trade. For the other frames (normative, environment, RS&T, energy and development), each newspaper reported less than 10 items for each frame. EU economic imagery was the most prevalent in the Korean media. The major frames in the Europe dataset were also economy, politics and social affairs: looking into social affairs news, three news outlets were more inclined to look at the lifestyle issues in Europe (European living standard or travel to Europe). When the results of Europe and EU news items are compared, issues of economic affairs still remain a major issue for the readers.

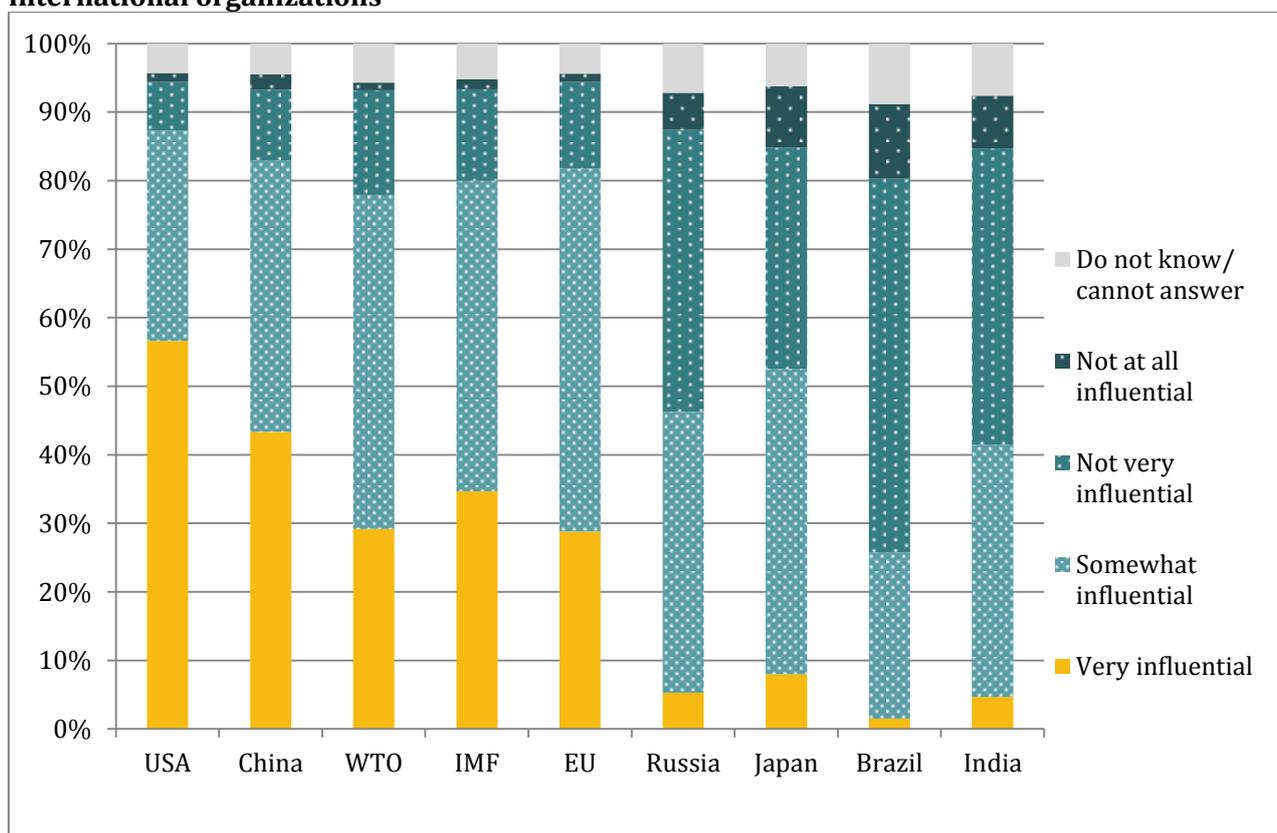
Figure 131. Distribution of thematic frames (EU news)



In the media EU dataset, key themes within the economic frame were the state of economy, business/ finance and trade issues: more specifically, the Greek financial crisis, the ECB's quantitative easing and trade between the EU and South Korea were covered. There was a slightly different profile in the 'Europe' dataset - business/ finance was the largest, industry the second and trade or infrastructure the third. The main topics reported were the stock market, cars and investment funds to Europe.

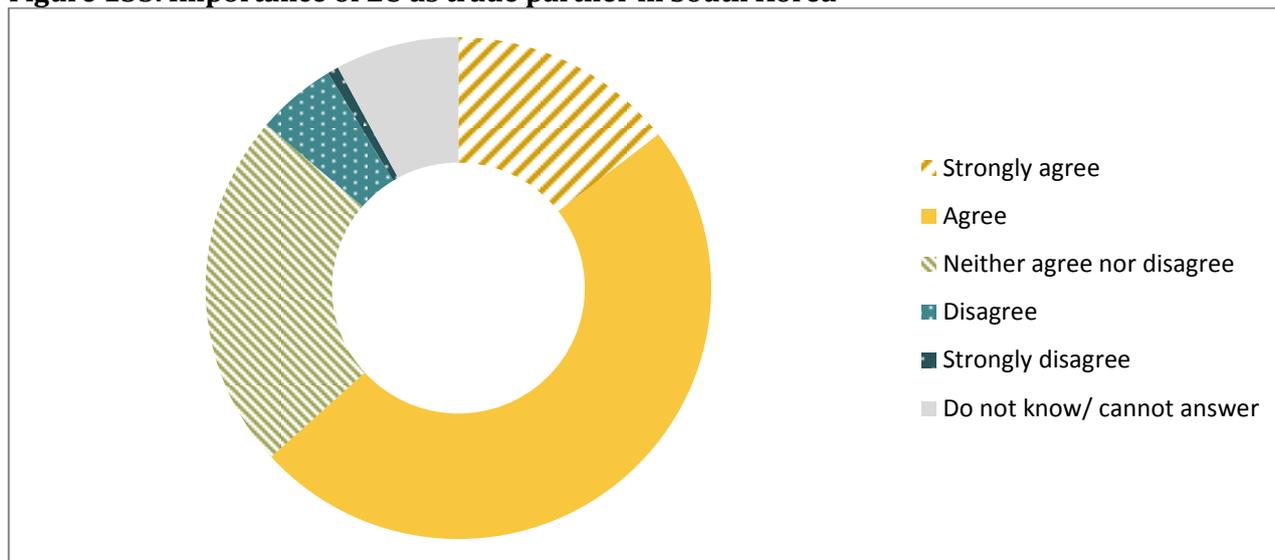
The *public opinion* survey revealed that the Euro was the most visible among the items describing the EU. Additionally, the ECB was the most visible EU institution. Perhaps surprisingly, the European Parliament was the second most visible institution, with the visibility of all other EU institutions lagging behind. The EU is among the global players in economic affairs South Korea respondents see as most influential, even if it lagged behind the US as well as China (see Figure 132). Respondents saw the EU's influence similar to, though slightly above, that of the IMF and the WTO. The EU was perceived as performing fairly well in global trade and - unremarkably - seen as an important trade partner (and also a foreign investor) for South Korea (Figure 133).

Figure 132. EU's influence in global economic affairs compared with countries and other international organizations



Note: Based on the answers to survey Q6: In your view, how influential in global economic affairs are the following countries and organizations? (N = 1238)

Figure 133. Importance of EU as trade partner in South Korea



Note: Based on the answers to survey Q14: Looking from South Korea's perspective, how strongly do you agree or disagree with each of the following statements about the economic relations with the European Union? The European Union is an important trade partner with South Korea (N = 1238)

Elite views were generally positive and typically noted that it was the economy and not politics that was the most relevant EU area to Korea: there were identifiable economically strategic benefits for both sides – perhaps best symbolised by the progress to the implementation of the EU-Korea FTA. A perspective from the next generation of Korean decision-makers (students) argued that EU policies did take into account Korea's needs, but mostly in a manner that serves its realist interests (such as trade or tourism). The EU's normative shadow was further commented on by a business CEO: 'Korean laws and regulations have been modified to meet the standards of EU and the US.'

Politics and security

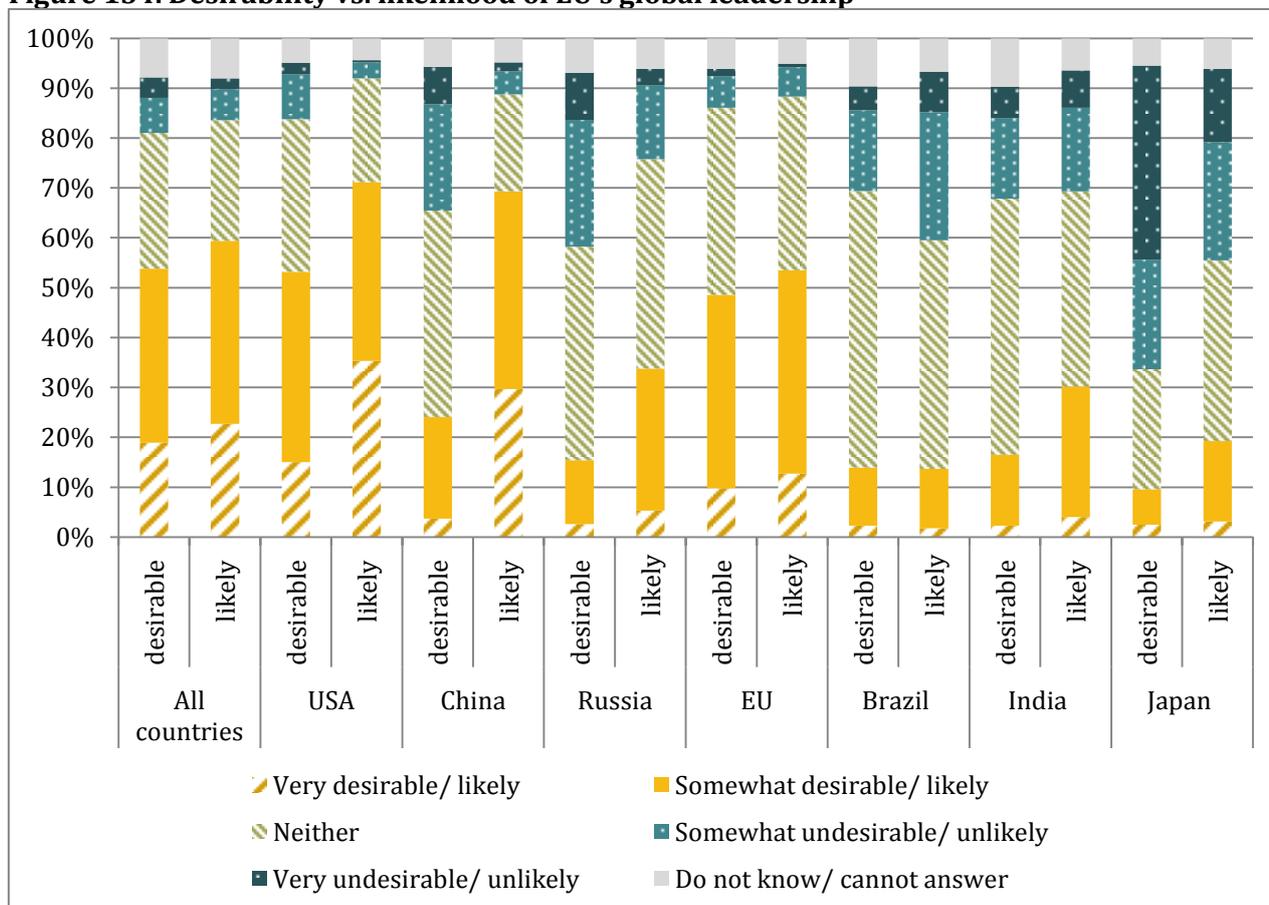
One interviewed *elite* had a relatively sophisticated understanding of the EU's historical motivations and noted that: 'institutions in EU/ EU Member States are established for peace-keeping purpose and to prevent war as well... Europeans are proud of operating them for over 60 years. It is significant that they appropriately use these institutions in order to achieve certain goals.'

According to an NGO interviewee, 'Koreans do not know much about Europe. In terms of almost all fields, USA is a military, political security and economic superpower. South Korea is highly dependent on the US power.' If this opinion is true it would be surprising to find much empirical data that informs the politics and security frame.

In terms of South Korean *public opinion* concerning global peace and stability, the EU was behind both the US and the UN. Looking more specifically, the EU's performance in peacekeeping operations is regarded more positively than other fields related to peace and stability, namely the fight against terrorism and military operations. Perhaps reflecting Korea's comparative recent membership of the OECD's Development Assistance Committee (DAC) members, one elite noted that Korea now considered official development assistance (ODA) as a cornerstone of its foreign policy. Furthermore, in the eyes of respondents in South Korea, the EU was less likely as well as desirable to take a leadership role in world

affairs when compared with the US, and considerably less likely to do that than China (see Figure 134).

Figure 134. Desirability vs. likelihood of EU's global leadership



Note: Based on the answers to survey Q4: How desirable is it that each of the following countries and organisations take a strong leadership role in world affairs; and Q5: How likely or unlikely is it that each of the following countries or organisations will take a strong leadership role in world affairs five years from now? (N = 1238)

In the EU politics frame the three newspapers were more inclined to cover *internal* issues of the EU – such as the UK election – rather than *external* issues to the EU. Conversely, for the Europe dataset the three newspapers were more inclined to cover *external* issues rather than those *internal* to the European region. For the *external* sub-frame, *Chosun Daily* and *Joongang Daily* mainly covered the issues that connected Europe and South Korea, while *Maeil Kyungje Shinmun* mainly covered issues about Russia. For the *internal* sub-frame, the three newspapers mainly covered France, Germany and the UK and Europe's internal political issues (defence budget, political conflicts and corporatism).

Development (social internal and international)

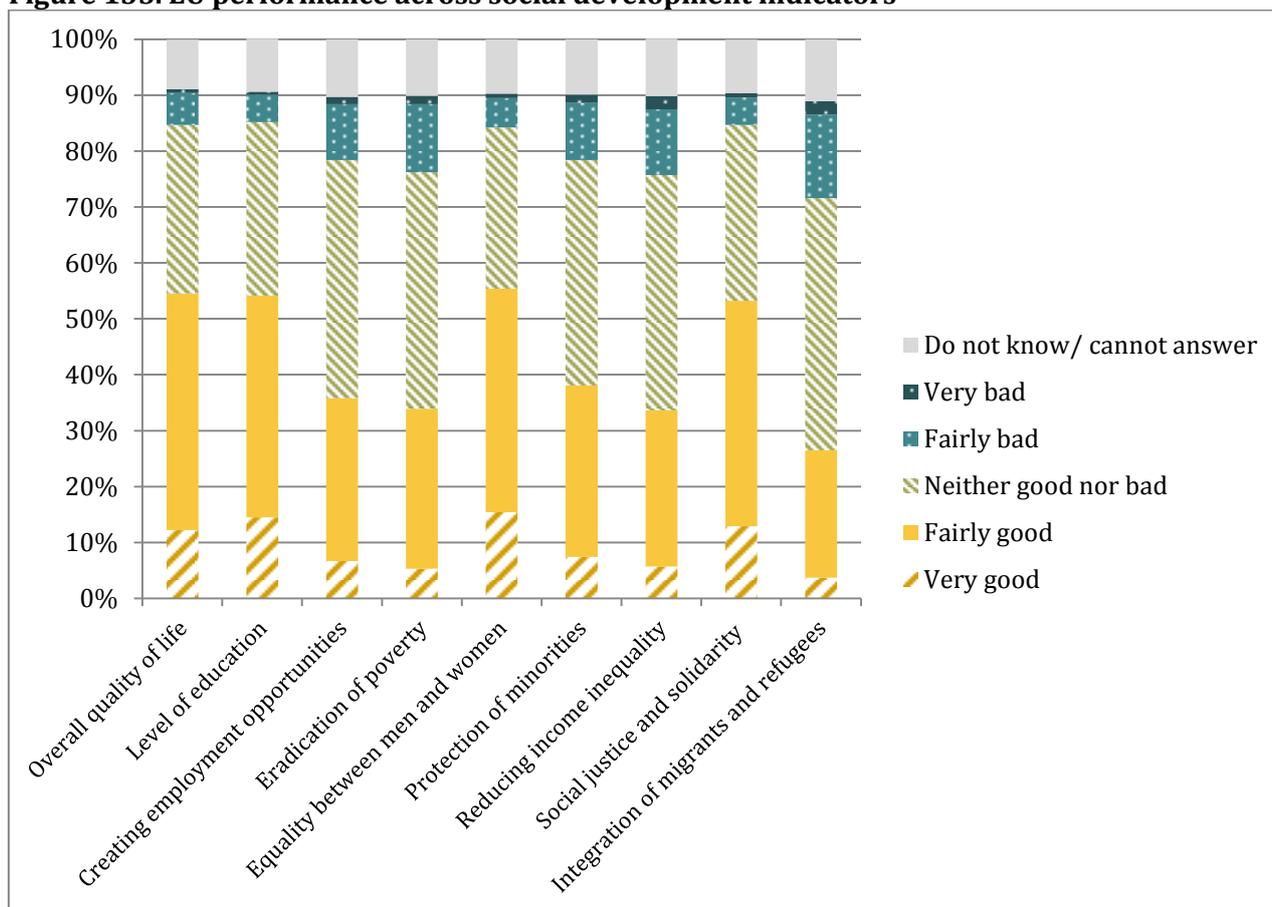
Korea followed the same disinclination to report the EU or Europe in terms of its development superpower status. The only story covered was aid for the Nepali earthquake.

Speaking about support to developing countries, the South Korean *general public* viewed the EU once more as less important than and the US, albeit slightly so. As concerns organisations, the UN was seen as a development leader, followed by the EU and then the World Bank.

South Koreans also saw the EU as playing a more important role in this respect compared to the remainder of the countries used for comparison.

In terms of *public opinion* on more specific topics related to **internal social development**, South Korea respondents saw the EU as performing fairly well in social justice and solidarity (e.g. social rights, the public welfare system) as well as gender equality (see Figure 135). Furthermore, the EU's performance in overall quality of life was amongst the most positively evaluated areas of social development.

Figure 135. EU performance across social development indicators



Note: Based on the answers to survey Q17: Generally speaking, how well do you think the European Union performs in each of the following areas of social development? (N = 1410)

Migration, multiculturalism and human rights

In the EU *media* dataset social affairs frame, migration ranked first (refugees), healthcare (fall prevention and tinnitus) second, and social legislation (welfare laws) the third most reported topics. For the 'Europe' dataset social affairs frame, the biggest sub-frames for the three newspapers were migration, history and entertainment.

South Korean *public opinion* respondents saw the EU's performance in the field of promoting and defending human rights worldwide very similarly to how it fared in social development, with the main rivals in these areas being the UN and the US. The role of other countries was seen as substantially less important than the role of the UN, the US and the EU. The survey also contained several questions on more specific human rights issues. Results showed that in South Korea the EU's dealing with refugees (and displaced people) was seen as less

positive when compared to the overall fairly positive evaluation of the EU's performance in other fields. This area clearly stood out as the one that respondents least often evaluated positively. The EU's performance in integration of migrants and refugees was also seen least positively among other areas of social development. For comparison, respondents evaluated the EU's performance in gender equality as the most positive among other human rights and social development related issues listed in this survey question.

Environment and energy

Looking into the frames of development, energy, environment, and RS&T, the number of the articles were extremely small – RS&T (under 40), energy and environment (less than 10), and development (none).

In the EU *media* dataset, the external environment frame (typically concerning Carbon Emission Trading) was a more popular focus than internal topics. In energy frame, the newspapers predominantly covered security of supply (generation IV international forum and energy supply from Russia) than sustainability.

This preference to report external rather than internal environmental stories was also evident in the Europe dataset. In the energy frame all three newspapers covered sustainability but did not cover competitiveness and security of supply. Consequently, the three newspapers paid some attention towards sustainable energies like solar, eco-friendly and bio energies.

The *public* were asked about climate change and environmental protection. The EU's role in fighting global climate change and protecting the environment was seen similarly to its role in maintaining global peace and stability. The EU in this respect again fell behind the UN and the US, albeit slightly so. In South Korea, protection of the environment and the fight against climate change was not amongst the fields in which the EU was seen as standing out the most. South Koreans saw the EU's performance in green technologies similarly to that in other economic activities and other specific fields of technological development.

Research, science and technology

The results for Europe articles resembled those of the EU news items dataset. In the research, science and technology (RS&T) frame, the three newspapers mainly covered the issues in research and technology in the EU dataset. Looking at 'Europe', the RS&T frame technology was the largest sub-frame for *Joongang Daily* and *Maeil Kyungje Shinmun*, while *research* was the biggest sub-frame for *Chosun Daily*. The science sub-frame was the smallest frame for all three newspapers.

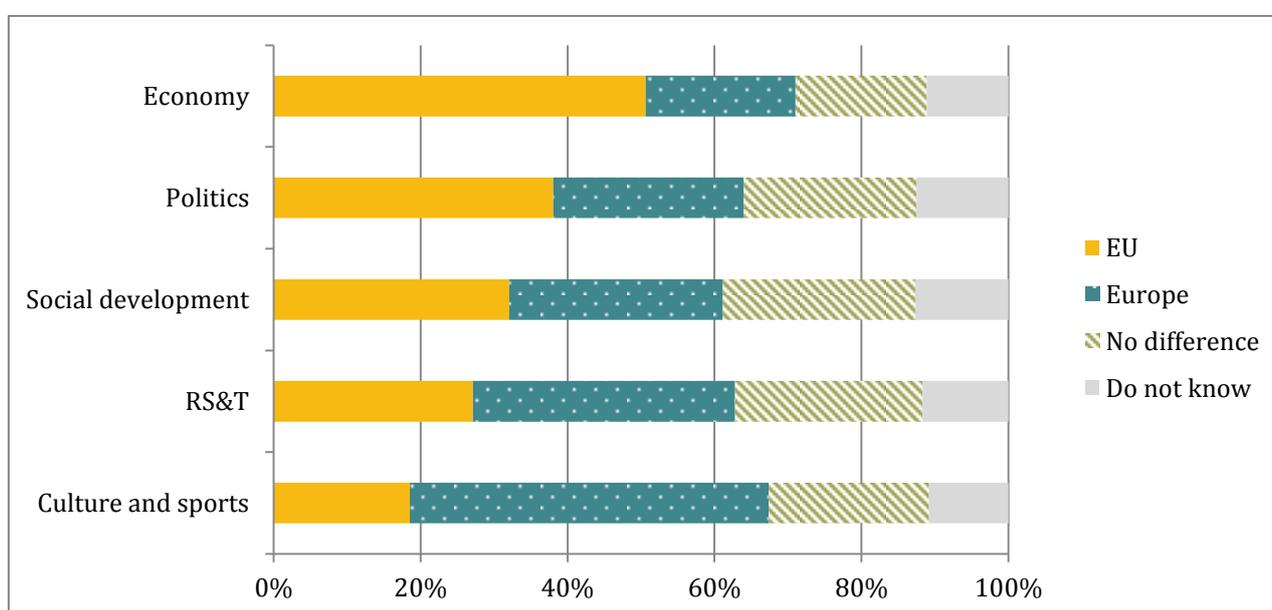
In the field of innovation and technologies South Korean *general public* respondents saw the EU as behind only the US. The EU's firm global stance was also confirmed by South Korean respondents who felt the EU performed fairly well in various fields of technology, as well as science and research.

Culture

The 'Europe' media dataset predominantly reported on culture with the focus largely on entertainment (26 articles in Chosun Daily, 13 in Joongang Daily and 20 in Maeil Kyungje Shinmun).

In South Korea, when compared to other countries, both EU Member States and the US were seen by the *general public* as particularly attractive for their culture and lifestyle. Even though respondents evaluated all areas related to EU culture very positively, they were more likely to choose arts, monuments and museums, modern architecture and design, over history, music and theatre and cinema. These opinions were in line with those on the EU's performance in the entertainment industry, which was evaluated least positively compared to other economic activities. In relation to other questions, respondents also tended to agree less often with the statement that Europe was a producer of music and arts popular in South Korea. Lastly, in terms of how respondents differentiate EU and Europe, research, science and technology together with culture and sports were associated first and foremost with the term Europe, whereas economy, politics and social development were firstly associated with the EU (see Figure 136).

Figure 136. Association of different areas to the EU versus Europe



Note: Based on the answers to Q23: 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 = 1238)

A business CEO made a specific and practical comment: ‘policies such as the Protection of Diversity of Cultural Contents partly resonate with needs in South Korea. It is not an EU policy, but the importance of this policy is highlighted in many European countries and Korea partially adapted it.’

Education

Education was all but absent in the EU (3 stories) and Europe dataset (19). Despite this the *general public* felt able to express their opinion. They saw the EU as important and trustworthy partner for South Korea in international relations and acknowledged the importance of the EU in educational exchanges. At the same time an increased share of respondents chose not to answer these questions, which suggests a somewhat lower visibility of the EU in those specific areas. At the same time South Korean respondents viewed the EU positively in terms of the level of education of its population, which was seen

as one of the areas of social development where the EU performed best. The EU was also seen as an important partner for South Korea’s educational exchanges. Yet the Erasmus programme was one of the least visible of the images describing the EU listed in the survey.

For once, the views of the student focus group may have informed relevance: ‘Europe has a lot of effective education systems such as Germany’s Job Training Programme or Finland’s Public Education Curricular. So I think we should take advantage to have relationship with the EU based on the Education programme and that could be a step to understand cultural difference.’

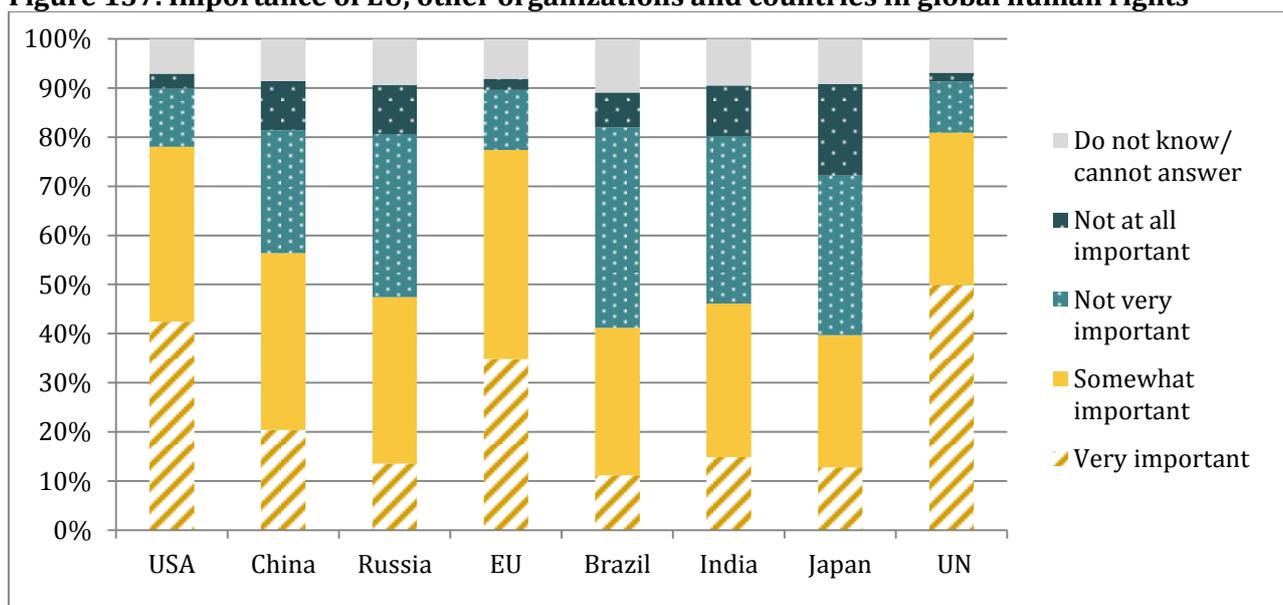
The EU as a norm-setter

Within the EU and Europe *media* datasets, normative elements covered topics such as peace, democracy, good governance and antidiscrimination. The *group interviews* touched on norms and values – the EU’s political integration’s ‘successful mechanisms and measures’ were seen as examples that could be adapted and utilized for Asian integration – ‘For example unification issue of Germany. We can learn from that for our future... EU integration we can apply that for economic cooperation among China and Japan and also future integration in Asia.’

However, a dichotomy was apparent again. The undergraduate cohort downplayed the EU’s role – ‘the US seems to be more visibly closer to Korea, more than the EU. The US is more of a norm setter’ and even went as far as to argue – ‘We have a stark cultural difference with Europe and with different perspectives and traditions. I think EU’s values – excluding universal values such as humanitarian issues are not in accordance with that of our country.’ Conversely, a business interviewee thought that the US had reached its limits and that ‘Korea may be able to learn from Europe in this regard.’

In terms of *public opinion*, respondents in South Korea saw the UN as the most important actor in the field of promoting and defending human rights worldwide, although the EU together with the US were positioned relatively close to it in this regard (Figure 137).

Figure 137. Importance of EU, other organizations and countries in global human rights



Note: Based on the answers to survey Q10: In your view, how important a role do each of the following countries or organisations play in promoting and defending human rights worldwide to protect human dignity, freedom, equality and solidarity? (N = 1238)

3.9.4 Local conditions: explaining the perception of the EU in South Korea

Perceptions are a result of interactions between internal (Korea-specific) and external (EU-specific and global) factors. There are several possible explanations for the profile of EU images and perceptions in Korea. The following analysis is based exclusively on the elite interview data.

The familiar categories where the EU might develop more effective partnerships were mentioned in the elite interviews: educational institutions; think tanks; energy, environment, R&D sectors; KOTRA; embassies; European Union Chamber of Commerce in Korea; Consulting companies or EU-expertise law firms; National Human Rights Commission of Korea; and Korea International Cooperation Agency. Both bodies in the public and private sector were the focus. The general conclusion seems to be that cooperation between Korea and the EU is relatively weak. To improve this network, regional experts – EU experts and field experts are needed.

3.9.5 Recommendations for EU Public Diplomacy

A knowledge and awareness gap exists. The focus group noted that the EU should promote more of its hard work in Korea as currently Koreans are not that exposed to the EU in every aspect, although a positive image towards the EU is by and large commonly held by Koreans. But if the EU promotes this better, a spill-over effect of strengthening relations between EU and Korea should ensue.

The following perceptions towards the EU/ European states policies were pointed out in interviews and these may be areas where the EU might be able to better leverage recognition as well as influence. First, EU practices are quite often reviewed by policy makers as examples of good practices; an enhanced dialogue without striking a hectoring and arrogant tone using these good practices can be an effective EU branding exercise.

Second, following the EU-South Korea FTA, relations are in the best condition in the economic context and the economic benefits for Korea should be regularly demonstrated (as well as any remaining fears and concerns moderated). Consequently, the economy is the most important and relevant area for Public Diplomacy recommendations.

Third, Korea has been maintaining good bilateral relations with each and every EU Member State: rather than perceive this as a problem, embracing and recognising the Member State perspective would be a more effective approach: an 'EU with the Member States' message should be consistently used.

Fourth, there are key areas of common interests that are under-utilised and open up opportunities for better engagement: thus the EU and South Korea should pay more attention to energy, environment, bio-industry, medical device industry, pharmaceuticals, automotive industry, and investment banking in their dialogues.

Fifth, regression analysis showed that the likelihood of respondents having a positive attitude towards the EU was positively correlated with those respondents with a higher age.

The oldest respondents compared to respondents in their twenties were around two times more likely to have a positive view on the EU's relationship with South Korea and also almost twice as likely to see the EU's role in global affairs as desirable. On average, their evaluation of the EU's performance in various fields was also more positive. This finding suggests that EU Public Diplomacy needs to invest more into outreach toward the younger generation of Koreans and in ways and mechanisms that appeal to them (such as social media).

Finally, Public Diplomacy needs to acknowledge areas where the EU's capacity is less widely accepted or understood and perhaps learn to be more accepting and protest less. Clearly for the Korean geo-political context, the EU has less influence in global political and security issues. To suggest otherwise would be a counter-productive strategy. Similarly, compared to the USA, the general public's perceptions toward the EU are quite limited, a reality that Public Diplomacy ought to take as a constant and strategize within that context when setting goals and ambitions in South Korea.

What then were the impediments and gaps in EU Public Diplomacy towards Korea that were evident despite no real historical, cultural or political obstacles being present? The main obstacles were seen to be: the financial crisis and current economic situation; limited attention and recognition given to the EU's role; and simply the substantial distance between the EU and South Korea.

Recommendations for EU Public Diplomacy from practitioners on the ground in South Korea

From the perspective of practitioners at the EU Delegation on the ground there are several areas where EU Public Diplomacy should concentrate its efforts. Firstly, the diplomats noted that EU messages must be tailor-made and well-framed in order to get transported. In this light, more outreach should be designed in Korean language to broaden the targeted audiences. More emphasis should be put on pressing political issues with high public interest, such as the conflict with North Korea. A multi-annual budget should be set in order to assure greatest possible flexibility on the ground.

The organisation of an online Film Festival could provide a good opportunity to attract (media) attention and connect with younger Koreans. The visibility of the EU can also be enhanced through stronger engagements in educational cooperation with Korea. The ICI-ECP programme should be further expanded. Given education is one of the most underdeveloped areas in terms of EU perception in Korea, the European Commission could elaborate on the possibility of participating in the ASEMDUO Fellowship programme that has been established at Korea's initiative as an ASEM activity.

Finally, the practitioners stressed that Korea also is well-known within East Asia as a country with a well-established network of scholars specialising on European integration and EU affairs. The EU Delegation is advised to make use of this academic network in strengthening its Public Diplomacy activities.

3.10 USA

This Country Chapter presents a synthesis of the US-specific findings of media analysis; elite interviews 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 the USA according to the research criteria applied – namely visibility; actorness and local resonance and norm-setter. Moreover, in the section on actorness and local resonance, we discuss these according to the themes analysed in this research: economy and trade; politics and security; normative and human rights; development – including the social internal and international dimensions; migration, multiculturalism and human rights; environment and energy; science, research and technology; culture; and education. The final section before policy recommendations looks at the local conditions that explain the perception of the EU in the USA. Finally, we conclude the chapter with recommendations for Public Diplomacy, including a subsection on recommendations in the eyes of practitioners based at the EU Delegation to Washington, D.C.

3.10.1 Sample

Public opinion

The online omnibus survey was coordinated and analysed by the Public Policy and Management Institute (PPMI) and conducted by TNS Global. The respondents in the US were surveyed in English. Data collection took place in August 2015. The online omnibus survey was designed to be nationally representative with regards to age, gender and region. The survey covered a total sample of 1,007 individuals within the 18-64 age group.

Media

The media content analysis was designed, supervised and coordinated by the National Centre for Research on Europe (NCRE), University of Canterbury, New Zealand, and conducted by local researchers trained by the NCRE. Two popular prestigious papers: *The New York Times* and the *Washington Post* and a business daily *The Wall Street Journal* were monitored daily between April 1 – June 30 2015 using e-search engine Press Display to ensure high accuracy in data collection. Two separate datasets were collected over the period of observation – ‘EU’ (685 articles) and ‘Europe’ (362 articles). Key search terms for dataset ‘EU’ included (with acronyms) ‘The European Union’, ‘The European Commission’, ‘European Parliament’, ‘European Court of Justice’, ‘European Central Bank’, ‘European Presidency’, ‘Council of the European Union’, ‘Eurozone’. The key search terms for dataset ‘Europe’ were ‘Europe’ and ‘European’.

Elite opinion

The NFG coordinated the interview programme and designed the questionnaires in close coordination with the Country Experts and the project partners. The NFG was also responsible for the training of the Country Experts and supervision of the implementation of the interviews. The interviews itself were conducted by the Country Experts. Interviews have been conducted as a source to identify upcoming trends and to cross-check findings. They are non-representative due to their current scope and should be considered as a tool for future evaluations in a representative volume. The NFG chose a three-phased approach: in Phase I, two transcripts were due until June 6; in Phase II, five interviews were due until

July 15; and in Phase III, five interviews were due until August 17. The NFG was in charge for the coding of the transcripts and the provision of the results to the project partners.

The interviews in the USA were conducted in English and transcribed by the Country Experts and PPMI. The Country Experts interviewed 14 experts (Academia/ Think Tank (3), Policy-maker (3), Civil Society/ NGO (3), Business (2), Media (1), Youth (2)) and chose not to hold a group interview.

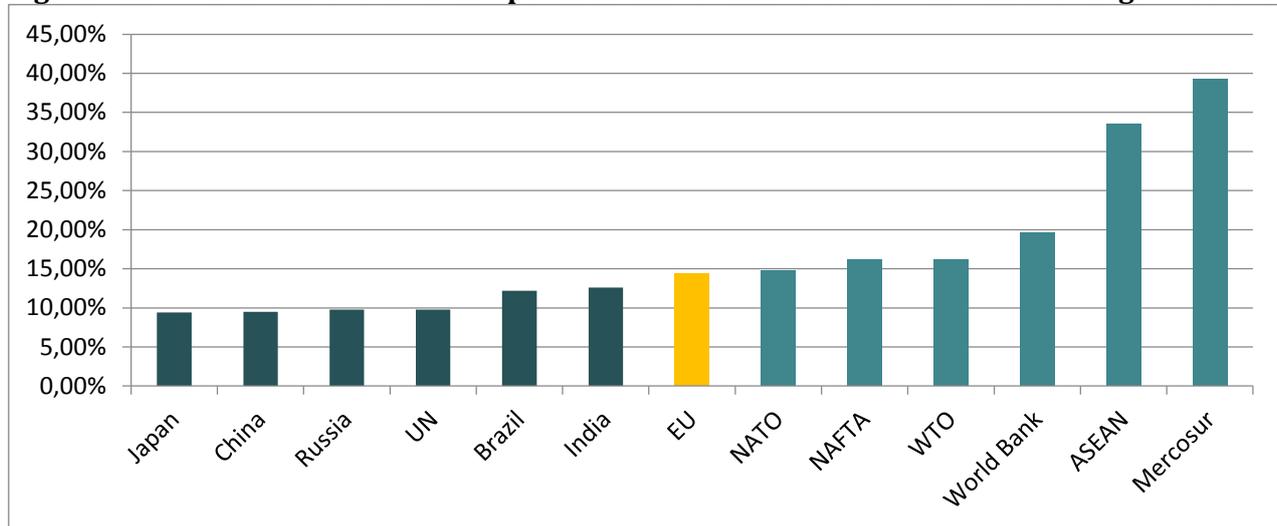
Semi-structured, anonymous qualitative interviews under Chatham House Rules were conducted with all EU Delegations across the 10 Strategic Partner countries, primarily in the form of a group interview. The groups included Heads/ Deputy Heads of Delegations, Heads of Press and Information Section and/ or Heads of Political Affairs Section. Interviews lasted between 60 to 90 minutes. In the USA, two diplomats were interviewed.

NB: two robust datasets collected in the course of public opinion survey and media monitoring allow for quantitative and qualitative analysis of data (for more detailed information, please see attached country-specific media and public opinion reports). Survey of elite opinion is impressionistic due to small numbers of the interviews. Data collected is analysed using qualitative approach.

3.10.2 Visibility

In the eyes of the US *public*, the overall visibility of the EU is similar to that of the countries used for comparison (see Figure 138). It is more visible than most other international organisations, including the NAFTA, and with the exception of the UN.

Figure 138. Awareness of the EU compared to countries and other international organizations



Note: Based on the answers of option ‘Do not know/ cannot answer’ to survey Q1: Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations? (N = 1007)

Media visibility of the EU was traced in two popular dailies *the New York Times* and the *Washington Post* and a business daily *the Wall Street Journal*. These papers featured a moderate sample that referenced the EU and its institutions (685 articles in three months) and Europe (362 articles). The averages for the 10 country sample were 505 articles in the EU dataset and 635 articles in Europe dataset. Articles reporting the EU tended to be longer,

often presented the EU with major degree of centrality and with high visual support (Figure 139). A substantial share of the EU articles appeared on the front pages of the papers (fully or partially). Such visibility of the EU could be described as *pronounced* visibility. Europe, in contrast was presented from a minor perspective and in medium to longer articles (Figure 140). Such framing suggests a somewhat ‘diluted’ visibility of the concept. The EU was framed as a major actor in the articles looking at the migration crisis, the Greek crisis, the anti-trust cases against Google and environmental policies. In less than 20 per cent of the articles, the EU was framed in minor degree of centrality. In these less visible cases, the journalists were focused on a question of American foreign policy, like the Iranian nuclear deal. In these cases the EU was presented as the USA’s partner. Overall, the most visible media themes were the two crises in Europe – the Greek crisis and migration crisis, followed by reportage on Iran nuclear deal.

Figure 139. Degree of centrality (EU news)

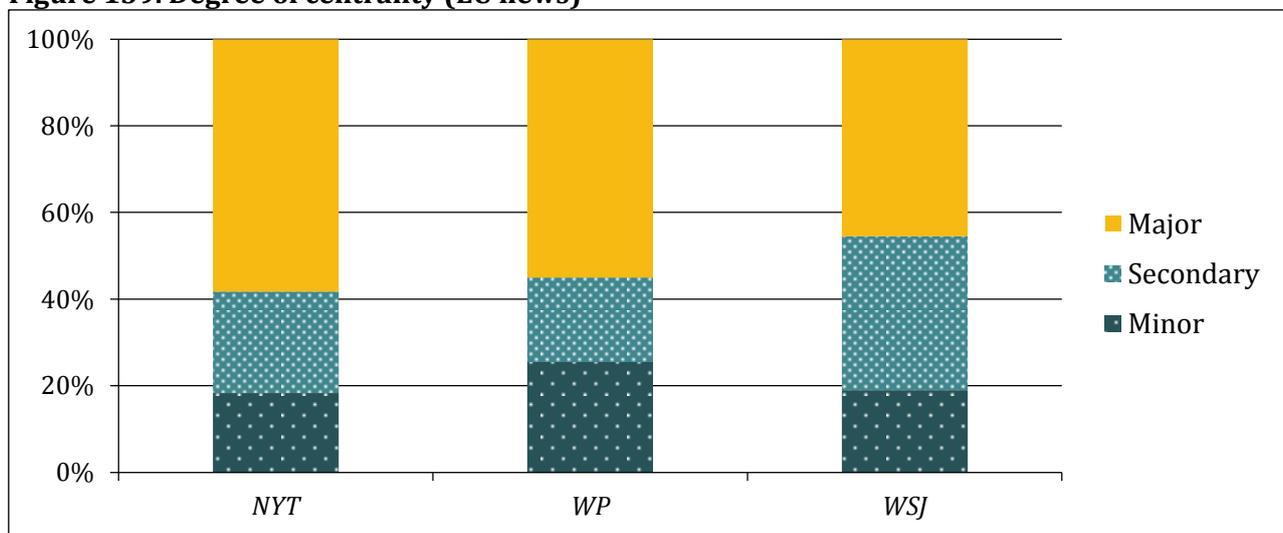
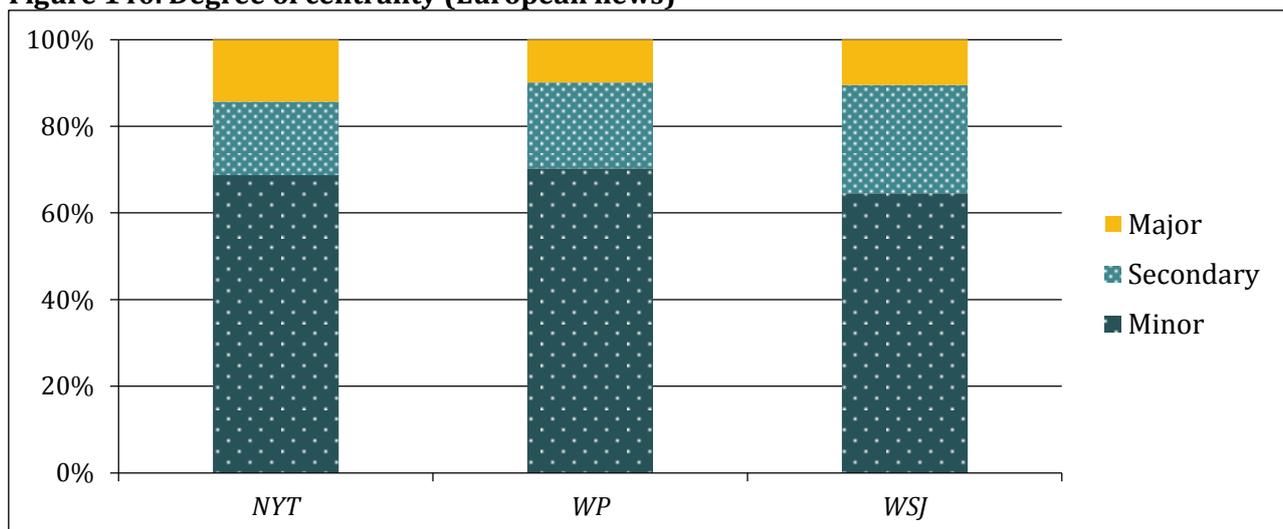


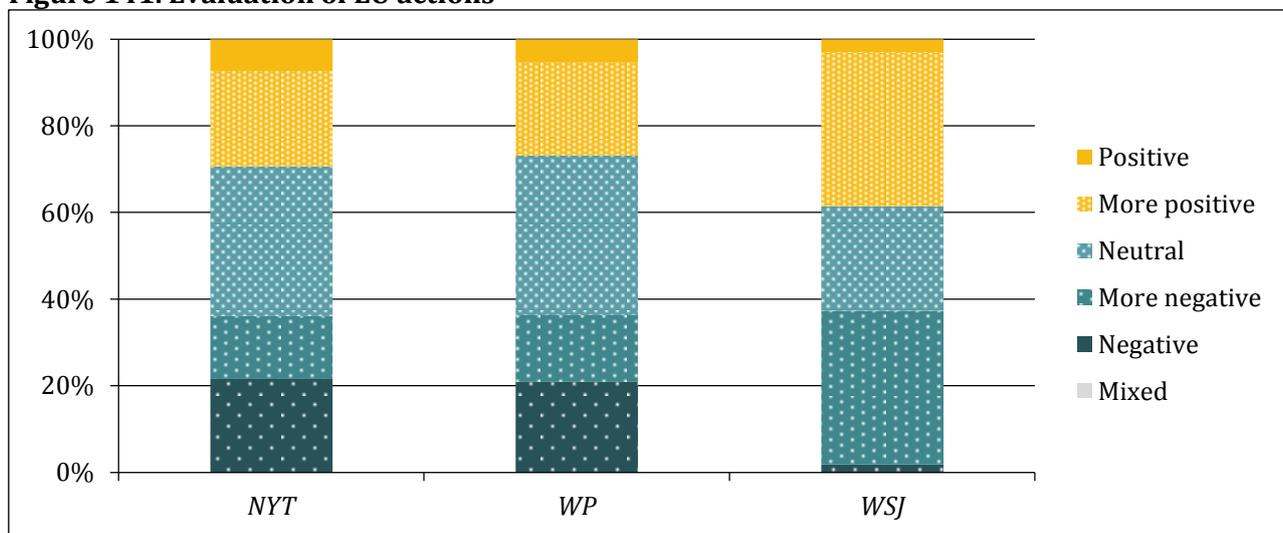
Figure 140. Degree of centrality (European news)



The most visible EU actors in media coverage were the European Commission and the European Central Bank. The Commission was more visible in first two months of observation (April and May) due to media attention to the antitrust cases against Amazon, Google and Gazprom; and the migration crisis in the Mediterranean and the plans developed by

Juncker’s team. In June, the Commission’s visibility was minimal. The ECB, the most visible EU actor, was the institution continuously covered throughout the three months of media analysis reflecting the protracted Greek crisis. The ECB and EC leaders – Mario Draghi and Jean Claude Juncker – were the most reported EU actors. The European Parliament was mentioned in relation to EU immigration policy, the migration crisis and the emergence of radical political parties. The visibility of EU institutions was not far behind the visibility of the Member States. Greece and Germany were the most widely reported with most of the reportage linking these two states in the context of the Greek crisis. France and the UK were the next most visible Member States, albeit for different reasons. The UK’s 2015 election and the possibility of Brexit attracted US media attention. France was reported in a variety of topics covering culture, radical political parties, anti-globalization sentiments, terrorism, etc. The evaluation of the EU in news was rather balanced (Figure 141).

Figure 141. Evaluation of EU actions



A small sample of local *elites* interviewed in this project demonstrated awareness and knowledge of the EU, its actors and policies. Visibility of the EU for them was mainly linked the considerations of security (e.g. European Defence, Russia & NATO, US Foreign policy and Iran nuclear deal). The EU was also visible within the contexts of domestic US politics (e.g. environment, climate change), and domestic European politics (e.g. irregular migration, extreme right parties).

3.10.3 Actorness and local resonance

The EU as a partner

In the eyes of the *general public*, the EU’s relationship with the United States was perceived to be predominantly good (behind only Japan). Interestingly, respondents saw their country’s relations with the EU and all of the countries more positively than when asked to express their general view. This may signal the presence of some local issues resonating and strengthening the positive perception of the EU in the US. The US and Japan were seen as slightly more trustworthy than the EU. The overall positive view on the United States’ relationship with the EU corresponds with answers to more specific questions about economic, political and educational relations with the EU discussed below. At the same time

and high share of respondents chose not to answer these questions, which indicates a somewhat lower visibility of the EU in those specific areas.

EU framing in *media* may provide some explanations to why the public did not comment on US-EU relations. The influential press presented a heavy focus on EU actions taking place in the context of EU affairs or EU Member States affairs (Figure 142). In contrast, there was a lower focus on the EU acting with a local, US ‘hook’. The dominant focus of domesticity was somewhat predictable, due to the severity of the unfolding crises in the EU. Yet, a low share of EU news with the local ‘hook’ (under 10 per cent in the USA press) is noteworthy. It was very rare to see an article covering the US and the EU together aside from pieces about trade agreement (TTIP), environmental issues (COP21), and the Iranian nuclear negotiations. Local ‘hooks’ are believed to increase the readers’ perceptions of relevance of an international actor to the country in question. The combination of low local focus and high external focus suggests that the EU is framed as an actor who acts far away, without any clear link/ impact/ relevance to the location in question. Nevertheless, local authors led in the coverage of the EU (Figure 143).

Figure 142. EU News ‘with local hook’ vs. news without it

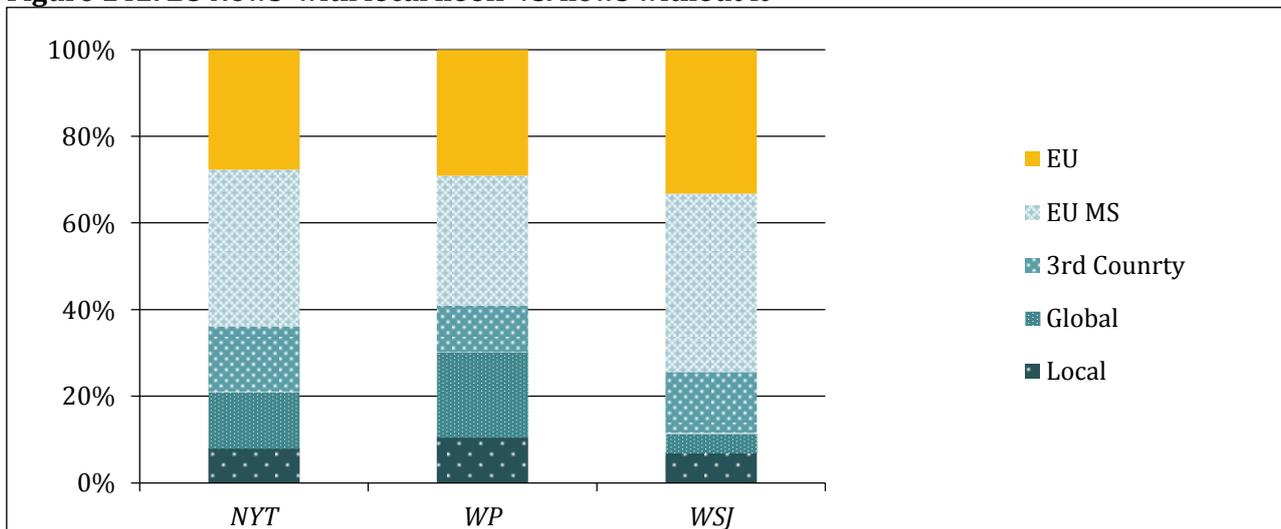
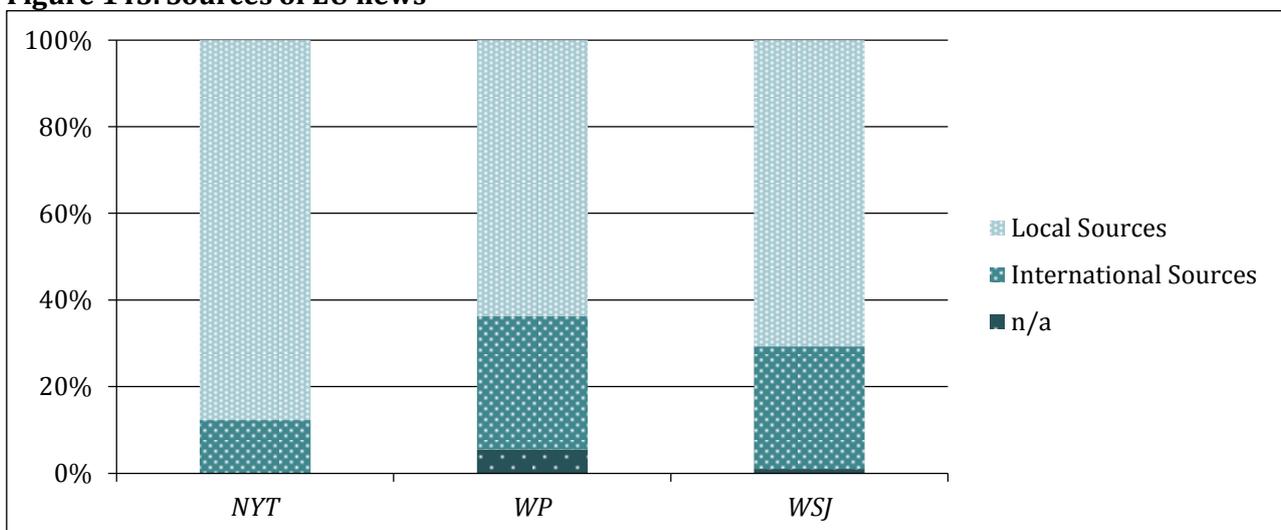


Figure 143. Sources of EU news

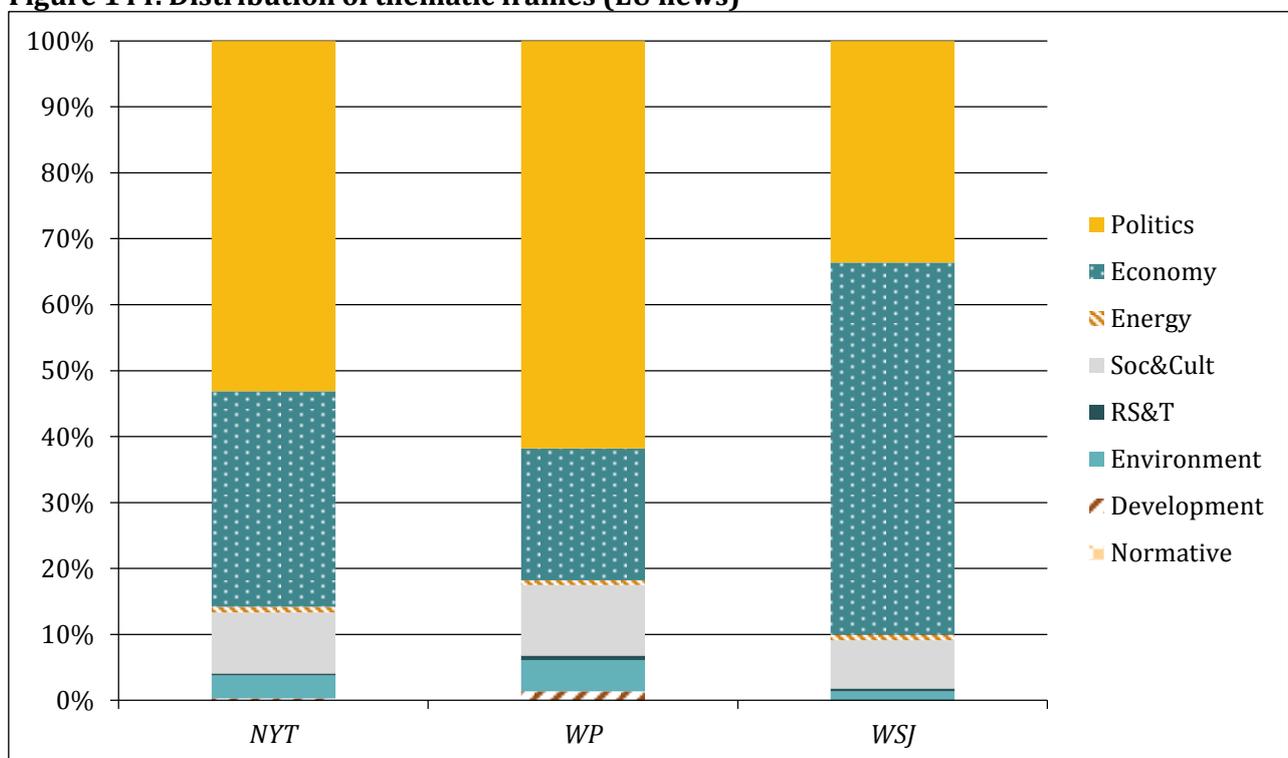


Economy and trade

Predictably, representations of the EU as an actor in the **economy** constituted the most visible frame in the business paper (in the two popular papers these reports were a distant second in visibility) (Figure 144). Across the three papers, in the economic frame, the highest number of articles looked at the state of the economy - the Eurozone and the future of Greece. Images of disease and sickness were predominant in the coverage of the Greek crisis, with the ‘unhealthy’ Eurozone embodied by the Greek crisis, compared the EU to a sick person and Greece described as being sick, unwell, or even dying. The sense was that a failed EU could spread to the US and have disastrous consequences for a weak American economy.

A few articles analysed **trade** relations with the USA, such as the TTIP. Importantly, the question of trade with Europe emerged in the US press only when the US Congress granted Obama the fast-track process, suggesting an importance of a local ‘hook’ in raising visibility of external events and actors.

Figure 144. Distribution of thematic frames (EU news)



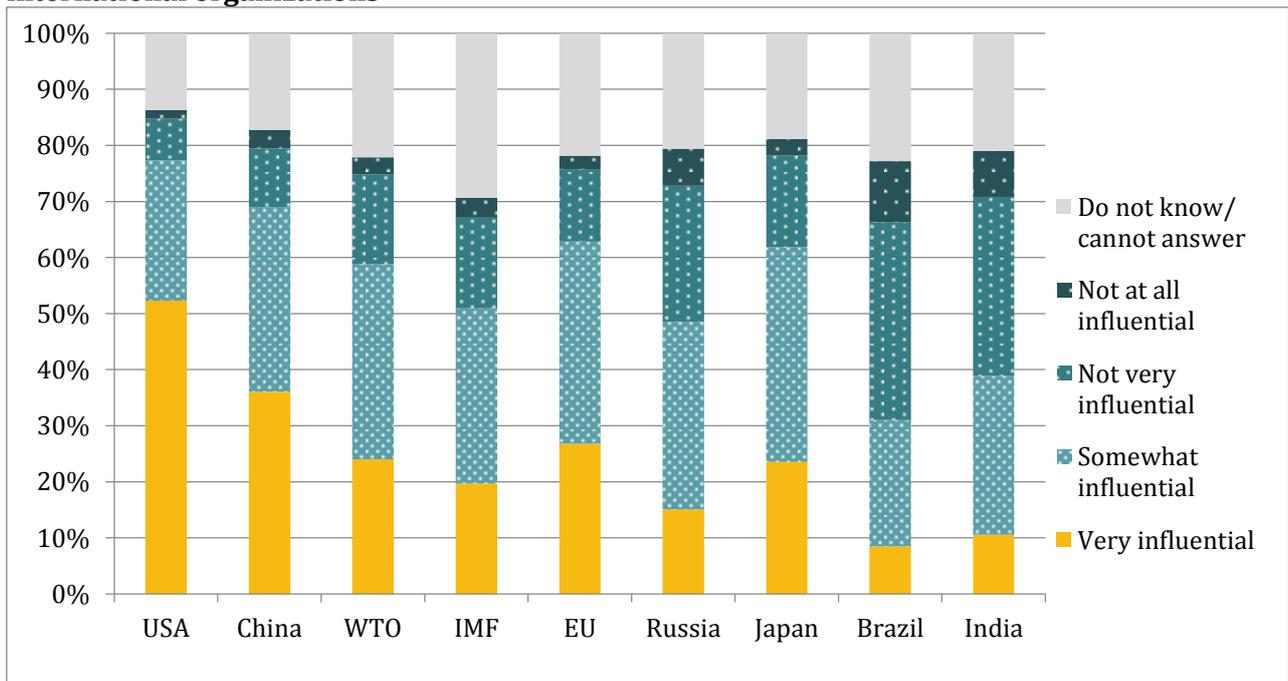
In the eyes of the *general public*, the EU was mostly associated with economy. The Euro was the most visible among the items describing the EU. The ECB was among the two most visible institutions, with other institutions lagging behind in visibility. The EU was perceived as performing well in global trade, and a high share of respondents agreed that the EU was an important trade partner and also a foreign investor in the US (see Figure 145). The EU was among the global players the United States respondents saw as most influential in terms of economic affairs (Figure 146). However, in this respect, it lagged behind the US and China. When compared with organisations, respondents saw the EU’s influence similarly to, though slightly above, that of the WTO.

Figure 145. Importance of EU as trade partner in the US



Note: Based on the answers to survey Q14: Looking from United States' perspective, how strongly do you agree or disagree with each of the following statements about the economic relations with the European Union? The European Union is an important trade partner with the US (N = 1007)

Figure 146. EU's influence in global economic affairs compared with countries and other international organizations



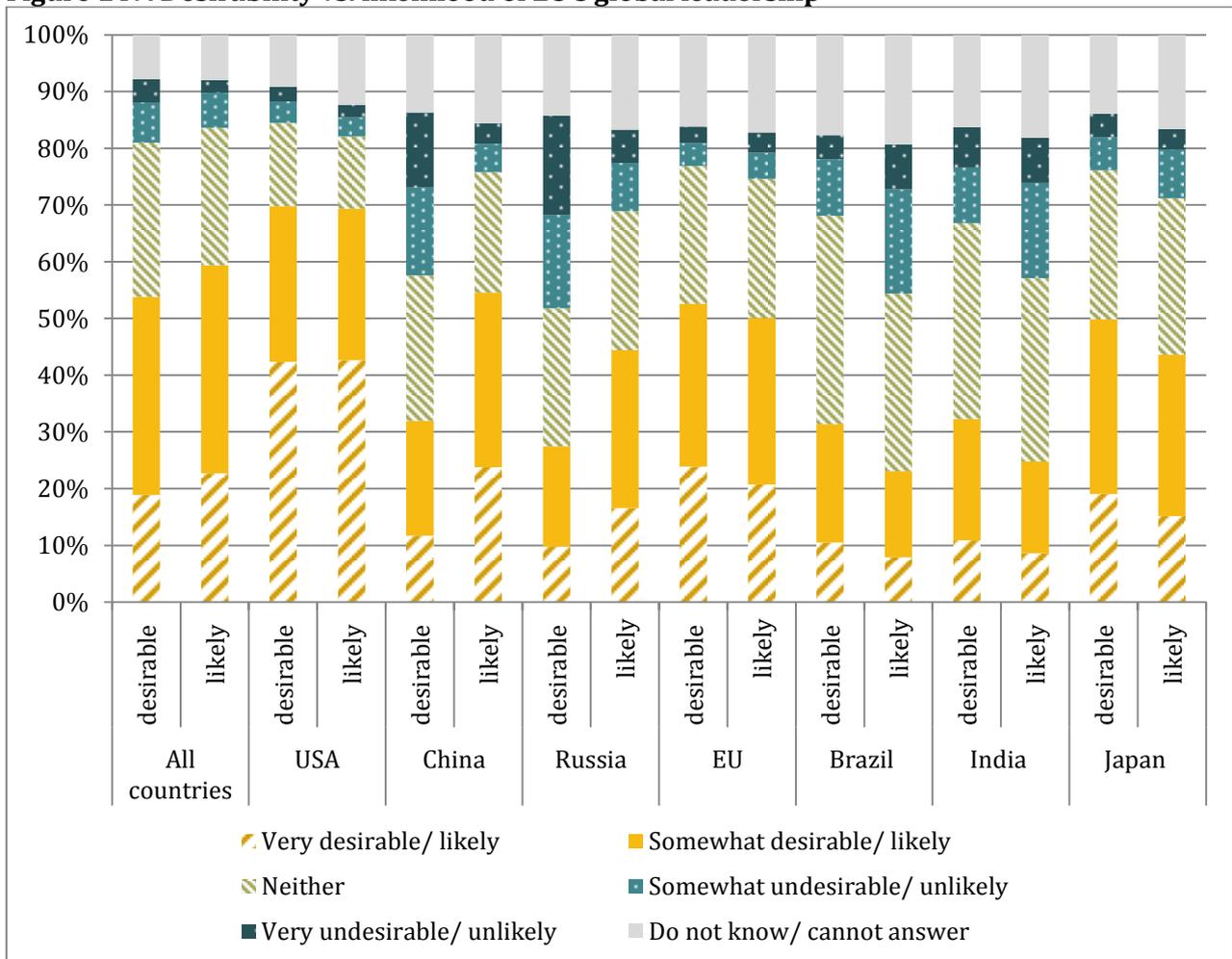
Note: Based on the answers to survey Q6: In your view, how influential in global economic affairs are the following countries and organizations? (N = 1007)

Perceptions of the EU by the small cohort of the interviewed *elites* resonated with the most visible media images. The EU was associated, on the one hand, with the Eurozone and economic crisis in Europe, and on the other, with trade (with TTIP and the fast-track process getting special recognition). Specifically on trade issues, the EU was seen as a rather effective, coherent and visible actor.

Politics and security

US public opinion perceived the EU as an important and trustworthy partner for the US in international relations. The EU's leadership in world affairs was seen as desirable. In the eyes of the US respondents, the EU fell behind only the US in terms of overall desirability of its leadership, although significantly so (see Figure 147). The EU also ranked behind the US and, to a lesser extent, China in terms of how respondents gauged the likelihood for a strong leadership role in the future.

Figure 147. Desirability vs. likelihood of EU's global leadership



Note: Based on the answers to survey Q4: How desirable is it that each of the following countries and organisations take a strong leadership role in world affairs; and Q5: How likely or unlikely is it that each of the following countries or organisations will take a strong leadership role in world affairs five years from now? (N = 1007)

In terms of US respondents' opinions on performance in global peace and stability, the EU was behind only the US. In the United States the EU's performance was seen as similar to, albeit slightly more important than that of the UN and NATO. Looking more specifically, the EU's performance in peacekeeping operations was regarded slightly more positively than other fields related to peace and stability, namely the fight against terrorism and military operations.

For *elites*, the EU was seen foremost in the context of the transatlantic security and counterterrorism.

Political representations of the EU in *media* were ranked first in the two popular papers in the EU dataset. These two papers also chose to give slightly more attention to the external rather than internal politics of the EU. On *external* matters, the news mainly focused on EU action around Mediterranean migration, Ukraine and relations with Russia (from either an American/ NATO, Baltic or Eastern European point of view). Framing of Europe echoed the EU's framing. On external politics, Europe was reported in the context of American policy-making (terrorism, migration, Ukraine, Russia, NATO).

Internal politics reportage of the EU highlighted the UK election, the referendum on gay rights in Ireland and party politics throughout the Union. The framing of politics correlated with the European Parliament being the most visible institution of the EU in the eyes of the general public, and went in line with the EU being often associated with politics. In media, the European Parliament was typically mentioned in one of the most covered topics – EU immigration policy and the migration crisis (as well the emergence of radical political parties). In reporting the concept 'Europe' in internal political issues, reporters typically positioned Europe as a reference to nation-level issues (e.g. radical politics in a particular member state).

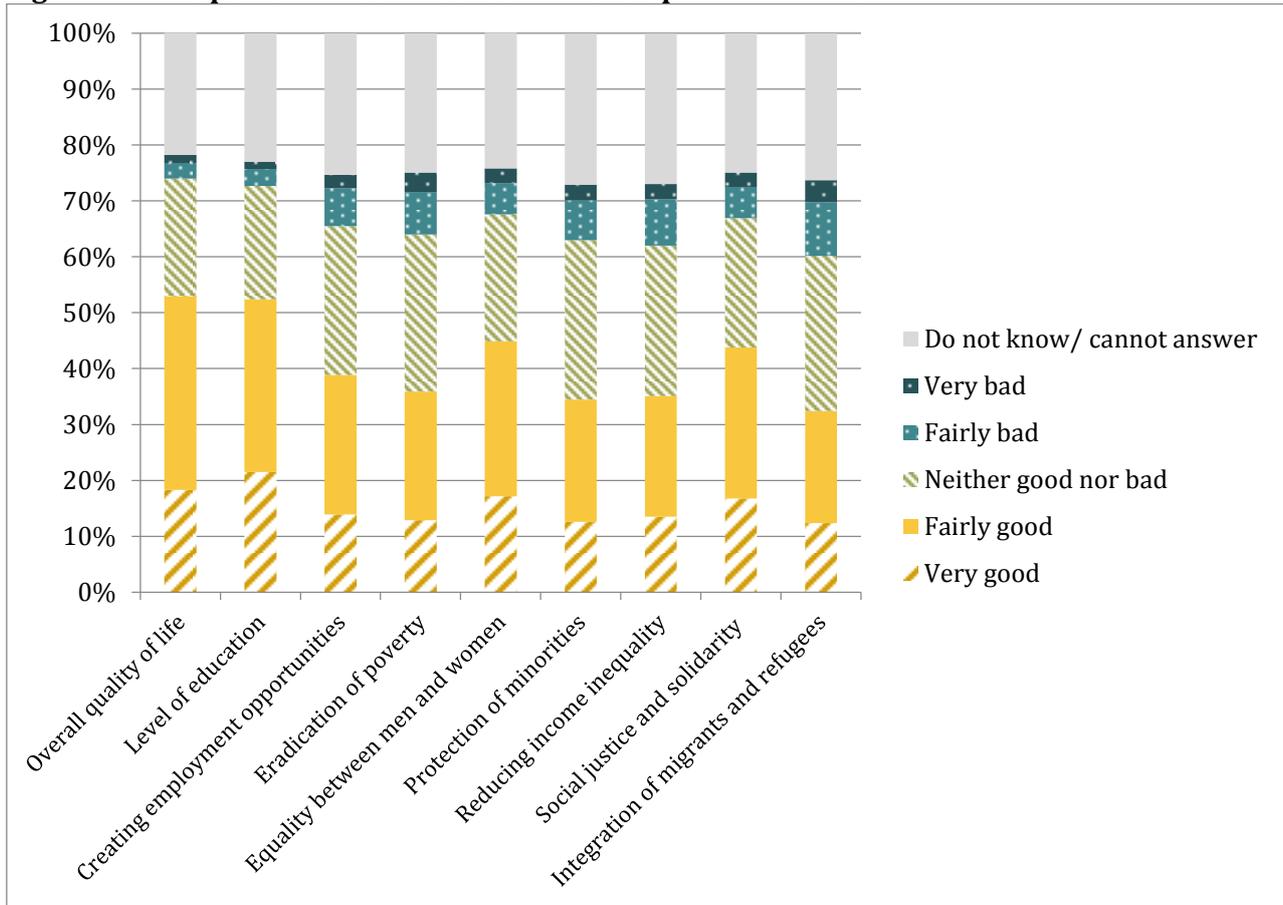
Development (social internal and international)

Media coverage of the EU in the context of international development was extremely limited, with a focus on the EU's assistance to Nepal in the aftermaths of the earthquake. The Europe dataset did not feature a single article that would reference 'Europe' in the context of international development. These frames are to some degree dependent on the news cycle (in the case of international development, aside from the earthquake in Nepal no other major tragedy has occurred in the three months of the coverage). Yet, the EU's ongoing development aid to various parts of the world was completely invisible in the media coverage.

Speaking about support to developing countries, US *public opinion* viewed the EU once more as less important than the US and, to a lesser extent, the UN. However, US respondents saw the EU as playing a more important role in this area than the World Bank. US respondents also viewed the EU as playing a more important role in this respect compared to the countries used for comparison. An impressionistic sample of elite interviews revealed that some respondents saw a lack of coherence within the EU that negatively impacts on international development.

As regards **internal social development**, the areas where the EU was seen as most effective were the overall quality of life, the level of education, social justice and solidarity, as well as gender equality. Generally, the overall evaluation of the EU's performance across social development indicators was rather balanced (Figure 148).

Figure 148. EU performance across social development indicators

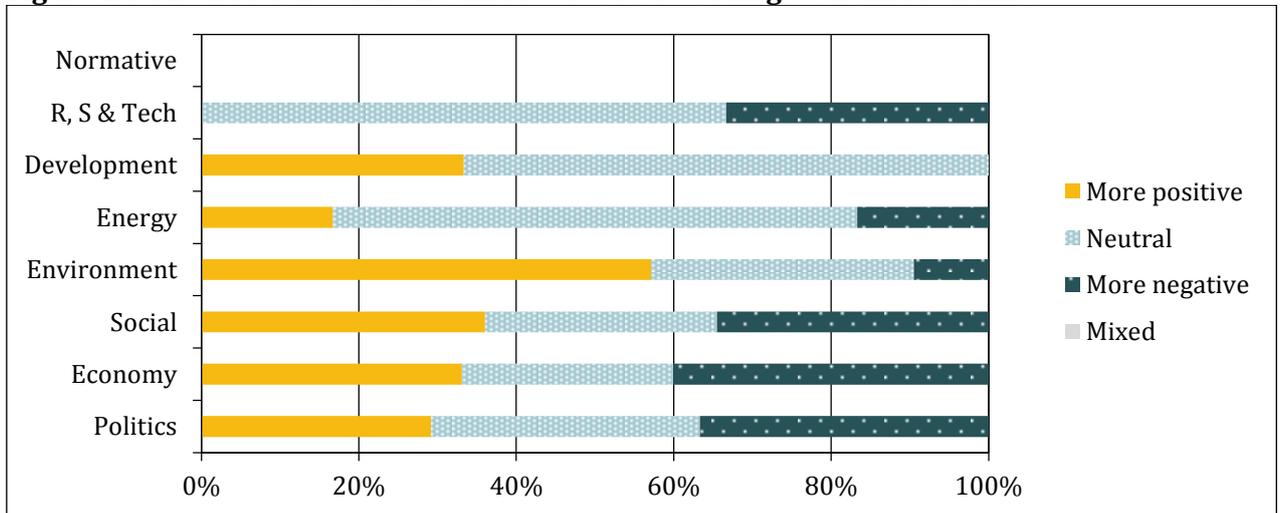


Note: Based on the answers to survey Q17: Generally speaking, how well do you think the European Union performs in each of the following areas of social development? (N = 1007)

Migration, multiculturalism and human rights

EU immigration policy and the migration crisis were among the most reported topics in the selected *media*. Social coverage of the EU examined the emergence of radical political parties in the context of the challenged multiculturalism in the EU. Images of modern-day problems in multiculturalism were further reinforced by historical references to diverse genocides (Armenian, Jewish) (for the distribution of evaluations across the frames see Figure 149).

Figure 149. Evaluations of the EU and its actors according to thematic frames



Public opinion results showed that in the United States the EU's dealing with refugees (and displaced people) was seen as less positive when compared to the overall fairly positive evaluation of the EU's performance in other fields. This area clearly stands out as the one that respondents least often evaluated positively. The EU's performance in integration of migrants and refugees was also seen least positively among other areas of social development. For comparison, respondents evaluated the EU's performance in gender equality as the most positive among other human rights related issues listed in this survey question.

For the small group of *elites* interviewed, the issues of migration crisis and human trafficking feature prominently in their perceptions of the EU. This policy-area was perceived as being incoherent in the EU.

Environment and energy

Together, the topics of EU actions in the issue-areas of energy and environment received limited *media* attention (averaging just 15 per cent over three months) and only the EU's **environment actions** received any significant coverage with recurrent articles about climate change and global warming. Most of the environmental articles were on external policies looking at climate change, GMOs, pesticides and honeybee protection. Framing of the concept of 'Europe' reinforced framings of the EU. Most of the articles examined the external dimension and directly referred to the Europeans' initiatives and projects and compared the USA with its European partners. For American media, in issues like climate change, GHGs, recycling and renewable energies, Europeans have established the baselines. In this frame, the concept 'Europe' was used in order to make direct reference to Western European countries and corporations. It was the most positive of all frames.

The media framing of EU actions in **energy** was comparatively low in visibility with articles focusing on climate change and on prices. With the low price of oil in 2015, the question of energy (supply and sustainability) appeared less important. In the dataset 'Europe' articles about energy framed Europe in terms of sustainability. The press reported Europe's challenge on transforming its economy by remaining green.

General public saw the EU's role in fighting global climate change and protecting the environment similar to its role in maintaining global peace and stability, although the latter ranked higher. For US respondents, the EU in this respect fell behind the US, and performed as well in this field as the UN. In the US, protection of the environment and the fight against climate change was not seen by the public as a field in which the EU was perceived to stand out the most. US respondents saw the EU's performance in green technologies similar to that in other economic activities and other specific fields of technological development.

For the small group of *elites* approached for the interviews, the most visible EU-related environmental issues were the EU role in curbing climate change and performing in the upcoming COP 21, as well as controlling GMOs and undertaking related agriculture policies. Reflecting on the EU's energy activities, the issues of security and security of supply were the most visible. Elites demonstrated awareness of energy policies in Spain and Germany, as well as the EU debate on the production of shale gas. EU coherence in the energy field was noted by some: 'I think energy. Especially with kind of the international meetings that are

held in the EU and the overall willingness to be a unit more so than ever.’ Yet, for others, the EU actions in the energy field were seen as incoherent damaging the EU’s overall image.

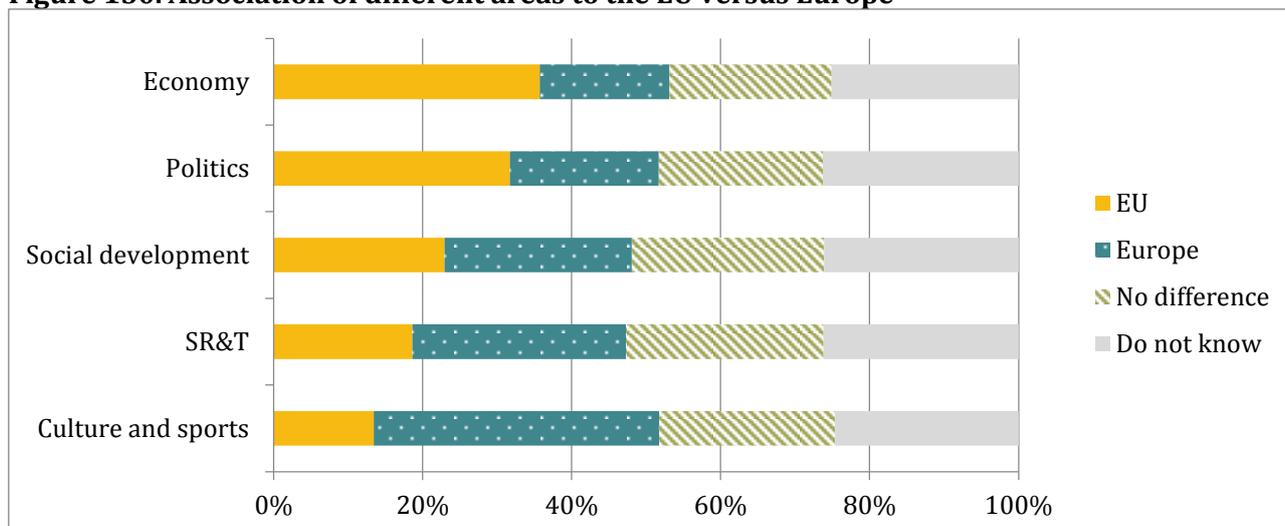
Research, science and technology

The reporting of the EU’s **research, science & technology** was barely visible in the media coverage (below one per cent across all frames and newspapers). When reported, RS&T issues covered were CERN, space missions and scientific discoveries related to health. The ‘Europe’ dataset was no different from the ‘EU’ dataset. Even though the number of articles was small, the tone reflected the positive nature of issues like the CERN project and space conquest (Rosetta).

Echoing the low media profile, in terms of innovation and technology the American *public* saw the EU lagging behind the US, Japan and China. Although US respondents viewed the EU’s importance in innovation and technological progress similarly to that in other areas, they saw rival countries as more important than the EU. Despite of the overall reserved view on EU’s global importance in this field, respondents felt the EU performed fairly well in technology, science and research.

In terms of how respondents differentiate EU and Europe, RS&T together with culture and sports as well as social development were associated first and foremost with the term Europe, whereas economy and politics were firstly associated with the EU (Figure 150).

Figure 150. Association of different areas to the EU versus Europe

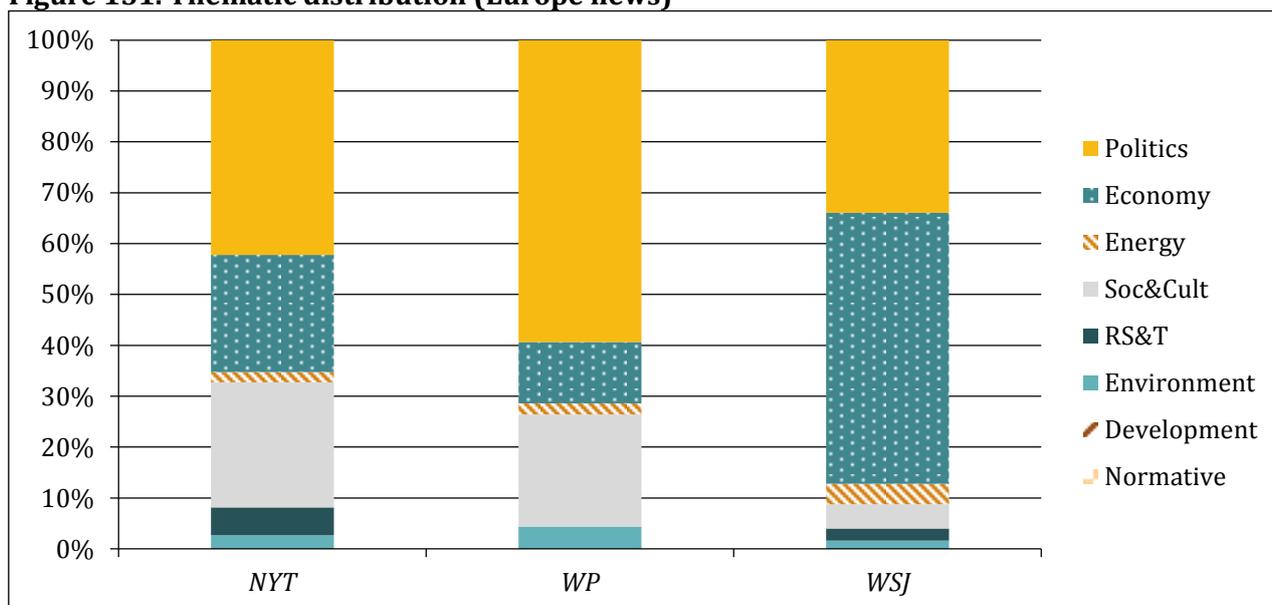


Note: Based on the answers to Q23: Some people think about Europe, whereas others think about the European Union when talking about economy, politics, culture, sports and other areas. In your case, which term – Europe or the European Union - comes to your mind first when you think about the following subjects? (N = 1007)

Culture

Media coverage of the EU touched on **lifestyle and culture**, yet those were not the dominant topics. In the dataset ‘Europe’, cultural matters were reported more than in the EU dataset, and the stories covered news in the context of entertainment and history (see Figure 151). Yet, out of the three papers analysed, articles about ‘European lifestyle’ were principally found in *The New York Times’s* large Sunday edition. Positive tones were visible in the press reportage of lifestyle and cultural issues in the EU/ Europe.

Figure 151. Thematic distribution (Europe news)



These positive media framings related to the *public opinion* on lifestyle in Europe. The EU's performance in overall quality of life was the most positively evaluated area of social development. While being seen trailing the US, EU Member States were viewed as particularly attractive for their culture and lifestyle. US respondents also generally saw Europe as an attractive tourist destination both personally and for American tourists in general. Overall, US public opinion respondents evaluated all areas of European culture very positively. They were more likely to choose historical heritage, arts, food and cuisine over sports, music, theatre and cinema. These opinions are in line with those on the EU's performance in the entertainment industry, which was evaluated less positively compared to other economic activities. In relation to other questions, respondents also tended to agree less often with the statement that Europe is a producer of music and arts popular in the US. In general, in the US such areas as economy and politics are first and foremost associated with the EU, whereas culture, sports and science is primarily associated with Europe.

A small group of *elites* interviewed shared some views on the EU in this issue-area. The EU was seen as 'very effective. For example European film festivals and cultural events are very popular. Food tastings. Americans have always had close ties and admiration for various European countries and cultures.' In this regard, Europe Day in Washington D.C. received a special mention as a successful and visible EU cultural initiative. Activities of some Member States were singled out in this respect: 'the Swedish Embassy has a consulate in Minnesota. Not many countries have a consulate in Minnesota, but because of the large Scandinavian population in Minnesota they've actually taken the time to do public outreach, try to connect with the different US populations there in the country that have ties with European heritage.' Such diasporic Public Diplomacy by EU Members States was positively appreciated.

Education

Educational topics received a very low profile in the media reportage, while *the general public* acknowledged the importance of the EU in educational exchanges. Yet, the Erasmus programme was the least visible of the images describing the EU listed in the survey. At the

same time, US respondents viewed the EU positively in terms of the level of education of its population, which was seen as the area of social development where the EU performed best.

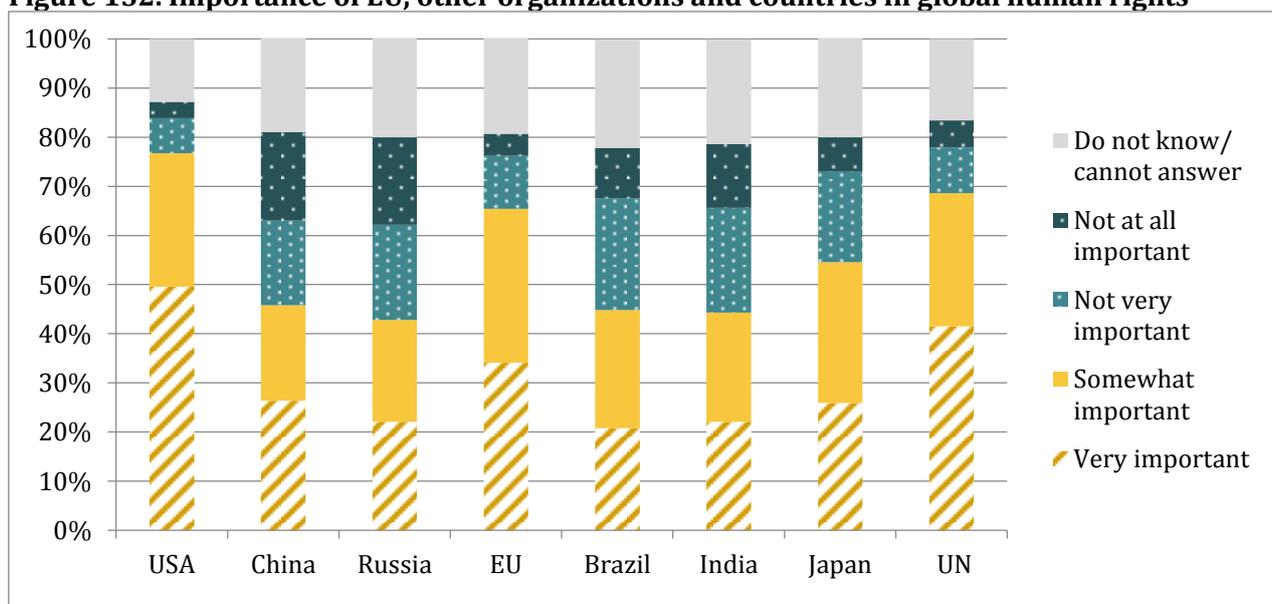
Interviewed *elites* (many of whom were experts from academia and think tanks) demonstrated awareness of a wide range of EU education-related programmes in the US (the Jean Monnet Lifelong Learning Programmes; EU Centers of Excellence; Erasmus Plus; Horizon 2020). Support for initiatives in the education field from private European actors were also noted. With regard to EU Member States, activities of the Spanish consulate in Florida were mentioned. For elites, Jean Monet Chairs in the USA and the network of the EU Centers of Excellence were seen of crucial importance: they were seen to be ‘playing a very important role in promoting education about Europe, funding European projects, bringing people from across the spectrum to learn about Europe and to discuss Europe ... they have had a very significant role.’ Their value is especially critical as ‘there is not enough attention and education in the US about the EU and Europe.’ The ironic paradox is that EU system of funding for the Centers of Excellence ceased in 2015.

The EU as a norm-setter

The normative frame did not receive any *media* coverage either in the ‘EU’ or ‘Europe’ datasets. No articles used or mentioned core normative concepts advanced by the Europeans.

US *public opinion* respondents saw the EU as performing fairly well in social justice and solidarity (e.g. social rights, the public welfare system). US respondents saw the EU’s performance in the field of promoting and defending human rights worldwide very similar to how it fared in social development listed above, with main rivals in these areas being the US and the UN (see Figure 152). The role of other countries is seen as substantially less important than the role of the US, the UN and the EU.

Figure 152. Importance of EU, other organizations and countries in global human rights



Note: Based on the answers to survey Q10: In your view, how important a role do each of the following countries or organisations play in in promoting and defending human rights worldwide to protect human dignity, freedom, equality and solidarity? (N = 1007)

For *elites*, there was a perceived commonality between the normative identities of the EU and the US: 'the US's goals, values ... are more in line with the EU than with China or India at this stage.' Transatlantic NATO cooperation was seen as one example where the normative visions from the EU and US converge: 'NATO is importantly based on these norms. What NATO defends are ... democratic governance, rules of law, human rights.' There is also a perception that when the EU undertakes its normative global outreach, the US is targeted by the EU 'in order to get its support, understanding collaboration, cooperation. The US is not targeted in the same way that most of the other countries Those are just the countries where the EU is attempting to push politics in a particular direction, to export norms, if you will.'

Nevertheless, some elites saw the EU as role model, especially when its values were used to promote the quality of life. In this regard, the elites argued that there is a potential for the EU to reach out to the US on a normative ground. For one elite, 'we as people look at what their culture is like and we kind of compare ourselves and we say look at the quality of life and retirement age and this and that and I think there are a lot of social aspects that we in the US look at that we try to strive to have – united healthcare system, things such as that. But in terms of the EU reaching out, I don't think the role has been extremely extensive.' This view was reiterated by another elite who shared a view on the missed opportunity for the EU to reach out to the US with its value through its market power: 'the EU has a huge market and can use that market leverage also to ensure that appropriate policies are put in place here for better trade between the EU and US that actually benefits local communities with less carbon footprint. So there are mechanisms that can be put in place and I feel that it has been under-leveraged.' The elite summed it up, 'they [the EU] could have used their political capital to much greater effect so that all of us benefit. And the EU has that kind of leverage.'

The US experts also saw some problems with the EU normative outreach globally, one of them being not following up on implementation: 'the problem that the EU has is that it articulates all these norms and goes to great length to advance them. But I am not aware of the fact that the EU has gone to great length to advance these norms.' The elite also pointed to the double standards that sometimes are observed for the EU as a norm-promoter: 'the EU has been quite successful, but the problem sometimes for the EU is in its image, in the sense that the EU is being accused of being hypocritical.'

3.10.4 Local conditions: explaining the perception of the EU in the USA

Perceptions are a result of interactions between internal (US-specific) and external (EU-specific and global) factors.

The small sample of the interviewed elites agreed that the negative images emanating from the EU/ Europe in 2015 have left negative impressions on the USA's belief about Europe's ability to shape its present. Ultimately, these EU-specific circumstances have sent an image of failure. Future studies of EU perceptions in the USA need to be undertaken regularly to track any further deterioration – or indeed improvement – in EU images. Such studies however, should be with a clear focus on issue-specific perceptions (as our research have already demonstrated, the issue-areas of environment, or culture, or education continue to be positively perceived and framed in the US despite the crises).

More US-specific factors include generating images linked to the US's self-image as a 'superpower' that sees itself as a global leader. In this scenario, the EU is imagined as a trusted partner, with similar values, but not *the* leading international actor. The role of an international leader resides – in the US public and elite perceptions – with the US only. Global factors – and growing multipolarity – have been also seen to negatively impact on EU perceptions, as for some elites, 'China is absolutely crucial... At all levels.' Future studies of EU perceptions in the USA should compare images of the EU vis-à-vis images of the 'emerging powers' in a systematic way.

Another US-related factor behind perceptions mentioned by the elites was the US world view which was argued to be rather inward looking. This outlook often comes with a low interest in the outside world, the EU/ Europe included. It potentially leads to a lower level of awareness about events and actors in the EU and to an exclusive use of the US as a base for comparison. This insularity of the world view also limits the consideration of EU ideas, experiences and achievements and of incorporating this reflection when thinking about the US. Future studies of EU perceptions in the US should study US self-images in a systematic way in order to offset the EU images in a nuanced way.

Somewhat linked to the issue of insularity is yet another US-specific factor, namely the limited penetration of knowledge about the EU and Europe inside the US, including limitations on various levels of the US education system. Future studies of EU perceptions in the USA could research, in a systematic way, framing of the EU/ Europe in secondary and tertiary level education discourses. Another direction for research is to study perceptions of the EU among those students who have had exposure to the EU-related content (e.g. through various programmes supported by the EU in the US and through exchanges) vis-à-vis those who have not had such exposure.

3.10.5 Recommendations for EU Public Diplomacy

The public opinion survey demonstrated that the EU was among the most positively viewed entities (below only the US and Japan) and rarely seen as negative. Comparing the EU to other international organisations, respondents evaluated the EU more positively than all other organisations except the UN and NATO. A majority of the public opinion respondents (54 per cent) explicated positive to very positive attitudes towards the EU. In contrast, respondents with negative attitudes towards the EU constituted approximately 16 per cent of the sample. The EU and the US were most often described as multicultural. The US and Japan were seen as slightly more modern and trustworthy than the EU. The EU was behind only the US in being described as united, although seen as less peaceful than Japan and India. The EU was least often described as hypocritical, arrogant and aggressive. Elites reiterated this positive public perception. In their view, there were no serious challenges between the EU and US, and most US people had positive views and perceptions of the EU and the Member States. According to the experts, there always will be occasional political clashes such as tensions during the Bush administration and over the Snowden case. Yet, the consensus was that there were no real obstacles in EU-US relations, 'the EU and the US are friends. This implies that they can disagree, but that will not affect their long term relations.' These positive perceptions among the general public and elites constitute a promising base

to continue and initiate a range of EU Public Diplomacy initiatives designed to resonate and amplify the positive outlooks within the US society.

Aside from cultural differences, the US and EU/ European states were recognised to be very similar. As one elite noted Europeans have 'more or less basically the same needs like we have. Ageing populations and ageing infrastructure... The US is not as old as the EU, but, you know, we are heading to that sort of paradigm of too many old people and social security, not enough young people providing for that.' Another area where the interests were seen to converge was security. NATO was frequently mentioned in the interview responses to different questions, and the US experts saw security concerns on the European continent to be very important for Americans. On this note, EU Public Diplomacy could prioritise its outreach targeting the topics which are perceived in the US to be 'intersecting' with the EU, i.e. having relevance for both societies. Thus, the demographic situation in the USA and the EU and social solutions, or security could be fruitful areas for such a dialogue.

Experts also shared an opinion that there was a need for the EU to be more visible in the US and have a clearer position on its policies. As one elite shared, 'I think there is a ton of things that Europe is doing, that are not visible in the US. ...with the green technologies even. I think they're doing a lot. ... they are very effective in this area, but not effective in communicating that. That's just one example, but there's probably plenty. Education, healthcare. I don't think you grasp the power of that and the effectiveness of it until you are in there and you've seen what they can do. And how different life could be with different healthcare and different technologies.'

In the eyes of the elites, there were a number of channels for raising the EU's profile and disseminating information. First is a more assertive and visible position of the EU and its institutions in communicating its policies through already existing communication channels. The majority of the interviewees had difficulties mentioning a clear EU or Member State programme and/ or initiative in the US outside of the higher education sphere. Keeping in mind an extremely low grounding of the EU in local US contexts by America's influential press that seems to reinforce a 'detachment' in the US profile of the EU, these elite perceptions suggest that EU Public Diplomacy needs to address this information gap through providing better advertising, framing and advocating. As discussed above, the issue-areas that are perceived to be 'similar' in the US and the EU could be first ones to initiate a more assertive profiling of the policies. Proactive outreach to the news-making community in the US by the EU Public Diplomacy teams is recommended here.

Research explicates that some policies did attract some visibility in perceptions: for example, EU policies in trade, national security, agriculture, energy and especially environmental policies (including biotech field). These are argued to bear direct relevance to the US. As such, there is a pronounced interest towards EU actions when it develops and advocates green technologies, fights for environment protection, regulates pharmaceuticals and elaborates national security. The EU and its Member States were also seen to be setting norms/ standards in the field of climate change, yet the perceptions in this regard were somewhat mixed. Experts also saw a division of roles between the EU and its Member States: the EU was seen as effective in shaping global competition and regulatory and competitions policies and in international economy; Member States were seen as effective and efficient in

particular issue-areas (e.g. the Scandinavians in economic development policies, Germany in energy policies).

Secondly, there is a need for a more diverse geographical outreach to the general population. So far EU information dissemination has been more or less visible in the key cities on both coasts, leaving out the Midwest and interior of the country. If EU representations were opened in various locations throughout the country, they could also serve as focal points for 'EU diaspora' – US citizens who experienced living in the EU and who came back. Such returnees' communities constitute a valuable resource for EU Public Diplomacy.

Thirdly, the low level of awareness about the EU in the US could be remedied through more education-oriented programmes on different levels of education that would be the key in informing youth about the EU. To reiterate, the questions of education and geography were cited by the elites as important dimensions in overcoming the lack of knowledge about the EU and Member State policies and initiatives.

Most of the interviewed elites had difficulties in formulating a spontaneous image of the EU. For some, to 'put a face' on the EU and Europe in the US was not a simple task. At the time of the interview, the dominant image emerging in association with the EU was 'migrants on a boat' (an image that correlates with a popular visual image in the analysed papers) which suggests that even well-informed and well-travelled elites are susceptible to the images circulated by media. Also, the elites shared their perception of the continuous economic decline of Europe – another popular media theme. Importantly, the elites thought that this economic deterioration, if not stopped, eventually will cause tensions between the two blocs. In this light, EU Public Diplomacy may consider approaching key business and opinion-making experts – through a series of presentations/ meetings/ round tables with high-profile EU personalities/ leaders – delivering an expert assessment and report on how the EU is overcoming economic crisis.

Elites demonstrated knowledge of the EU's internal operations that attracted some negative assessments – the EU was sometimes seen as a large and somewhat inefficient bureaucracy. It was also seen lacking institutional integration which was seen to be affecting the decision-making process and external perceptions of EU cohesion. Eurozone crisis and migration were used as the two most obvious examples of EU policy-making that are perceived to be impacted by non-cohesive policies, but elites also listed other such affected areas are energy, environment and foreign policy. As discussed above these are the policy-areas that seem to be of the greatest interest among the US experts, and as such EU public policy could specifically produce various initiatives that reinforce the message of coherence in these three areas of energy, environment and foreign policy.

The dialogue between the EU and US on norms is not perceived as an antagonistic one, yet it is not seen to be without contradictions. While the US itself is credited with a norm-sender/ norm-exporter persona, the EU is seen to share the same perspective, often using the US to reinforce its normative messages. In this light, the EU was not recognised as a norm-sender towards the US. Yet, importantly, there were subtle nuances in this perception. The EU was occasionally seen to possess enough market power to send the US some normative messages (especially in the area of environmental protection and climate change) and be used as a model inside the US to be adopted or adapted. Elites also demonstrated a somewhat mixed

understanding of the EU and European states in setting norms/ standards – especially in the areas of climate change and agriculture. For some elites, the Europeans were setting the bar, but were not setting the norms. The EU was also sometimes seen to have no resonance in the US about its policies and norms, with only specialized target groups being aware of EU policies.

Unlike the relationship between the EU and NGOs in global south countries, which is mostly donor-recipient, EU Public Diplomacy may improve the EU's visibility by collaborating with US-based NGOs working in third countries where the EU is already working too on similar topics. For instance, the Carter Center is conducting electoral observation missions in countries where the EU is also conducting observation. This mechanism of Public Diplomacy cooperation with US-based NGOs in third countries would I) publicize EU policies within the United States and II) emphasise that the EU is already in partnership with the US tackling global or regional problems.

Reaching out to interest groups, NGOs and scholars, among other groups already mentioned in the report, in the broader context of the negotiation of the Transatlantic Trade and Investment Partnership (TTIP) would contribute to improving the visibility and understanding of EU policies. It is important to keep in mind that the TTIP will be in the EU-US agenda for several years, not only during the negotiation, but also during the potential ratification and implementation. While some of the strategies of improving the visibility of the EU in the US are already mentioned in the report, a TTIP-Public Diplomacy should focus on those sectors like-minded or not that have raised concerns, in favour and against the TTIP, in more specific areas such as food security (GMOs) or transparency, for instance.

A small group of elites interviewed for this study came with a detailed list of potential partners for the EU Public Diplomacy. Among those listed there were multilateral organisations of American Societies (OAS) and NATO. At national federal level, elites saw interest in the executive branch (White House, agencies, and other departments) or between the different branches of the Federal Government (Congress and Supreme Court) with the respective institutions in the EU. At the state level, experts recognised potential interest in contacts with the EU (e.g. some states like Florida, Virginia and Iowa have their own trade policies). EU Public Diplomacy could directly target the caucus of the governors of different US states for exchanges and initiatives. Academia, research institutions and think tanks were also among the most visible partners listed by the elites on this level.

At the local level, local governments were reported to be open for potential contacts with the EU. As such not only state, but county levels should be reached by EU Public Diplomacy. Elites specifically singled out the importance of Public Diplomacy towards the municipalities and cities. The sister-city programme received positive appreciation. Elites also recommended approaching city mayors of the major urban hubs (e.g. Chicago, New York City, etc.) for exchanges. One elite reflected on the collaboration between the mayor of London and the mayor of New York. In this initiative, the mayor of London 'sent ... all his aids ... to be trained at Bloomberg's offices. I don't know if that was an official programme or not, but it definitely seemed like one was influencing the other. Bloomberg clearly had a lot of... sort of a European take on his policies.' The elites stressed the need for more activity from the EU at the city level on a wide range of issues. However, if resources are of concern, then, in the eyes of the elites if the dialogue and outreach on the level of the cities is designed

around issues related to environment, it would receive a good reception. Finally, local schools were seen as potentially useful points of entry for EU Public Diplomacy at the local level. In particular, elites recommended outreach in K-12 grades, meaning in elementary, middle and high schools.

Recommendations for EU Public Diplomacy from practitioners on the ground in the USA

From the perspective of practitioners at the EU Delegation on the ground there are five areas where EU Public Diplomacy should concentrate its efforts. Firstly, the diplomats noted new and growing target groups. Among those, Latino/ Hispanic community was standing out. However, approaching a new target group requires further resources. Second, an increasing demand of climate diplomacy and need to address it was stressed. This view echoes the empirical findings discussed above. Third, with the new HR in the office, who is seen as active and eloquent, high level visits are regarded as essential to strengthen the focus on EU foreign policy messages. Next, practitioners on the grounds call for a Comprehensive Public Diplomacy Strategy to necessarily adjust messages and tools to a country's particularities. A framework must be established to provide guidance and ensure flexibility. Finally, mastering of social media and E-Diplomacy is required. These are increasingly important tools to reach out to (distant) publics. As regards a PD Strategy, this should be emphasised and used more.

4 TARGET GROUPS, AUDIENCES AND POTENTIAL PARTNERS

4.1 Target groups and audiences

4.1.1 Introduction

Compiling the main findings from elite interviews, country overviews, literature review and stock taking report, this section aggregates the opinions of elites from the 10 Strategic Partner countries as well as officials from EU Delegations concerning key target groups and potential partners for future outreach activities across countries. The section lists identified target groups for EU Public Diplomacy initiatives, as well as actors and institutions that interviewees pointed out as potential partners for future cooperation with the EU. Six pre-determined types of actors, organisations and institutions were mapped according to their different areas of influence: government/ policy-makers, business, civil society, academia and think tanks, media and the general public.

As identified by EU Delegations and seconded by elite interviewees, key target groups for EU outreach other than business span youth, academia and media – specifically online media and television – as main multipliers of EU messages. Moreover, both country elites and EU officials suggest an increasing engagement of the general public as target group which they consider a relevant audience for future EU Public Diplomacy initiatives. In the 10 SP countries, enhanced outreach to general publics is particularly important as they – and to some extent elite groups, such as policy-makers (India) or civil society actors (South Africa) – express a lack of knowledge about the EU's structures and policies causing perceived vagueness of the concept 'EU'.

Regarding potential partners for future EU outreach, elite interviewees across countries indicate that the lack of knowledge also leaves space for various cooperation opportunities: again, the business community is considered the most important and resourceful partner, followed by academia and representatives from think tanks. Elite interviewees furthermore see a need for more targeted reach-out to urban audiences for future collaborations.

Section 4.1 provides an aggregated analysis of target groups and audiences assessing generalizable trends and commonalities across all 10 Strategic Partner countries and pointing out major differences between countries due to local conditions. Section 4.2 introduces examples of country-specific key target audiences and potential partners with whom the EU could run future projects and outreach activities.

4.1.2 Key target groups, audiences and potential partners

Business

Interviews show that the business sector is most aware of the EU and its policies due to close economic relations between the EU and the respective country. At the same time business elites constitute the most promising potential partners for EU PD initiatives. Their enhanced awareness constitutes a pre-condition for successfully reaching out to this target group. Thus, addressing business communities and networks, especially chambers of commerce and industry associations seems to be most promising and effective. All data analysed (LitRev, STR, elite and Delegation interviews) corroborate that the business community represents the most relevant target group across all partner countries for the EU Delegations.

Youth

Youth has become a major target group for EU's Public Diplomacy efforts. Communication with this group is a key concern for the EU as education is a priority area for EU outreach influencing both upcoming and established young researchers' perceptions of the EU. The analysed data (elite interviews, STR and LitRev) seconds this assessment indicating that youth and especially young professionals shape (political) relations in the long term. Delegations engage the target group through educational programmes and academic fairs, as well as educational centres like the Jean Monnet EU Centres of Excellence and exchange programmes like Erasmus Mundus. Across all partner countries, elites and young people – students and pupils alike – assess these programmes very positively despite their generally low visibility among the general public.

Interestingly, the youth's opinions in the EU differ starkly across SP countries: while in some countries younger people assess the EU more positively (Canada, South Africa) than older people, in other countries younger respondents' overall evaluation of the EU is (far) more negative than that of older respondents (Brazil, China, Japan, Mexico, South Korea, Russia and USA).

Therefore, educational bodies such as universities or secondary and higher educational institutions constitute very promising potential partners for future cooperation. So far, efforts have proven to be most successful in the area of academic exchanges.

Academia and think tanks

In contrast to previous assessments indicating that academia has been only to a limited extent a focus of past EU outreach, all up-to-date data emphasises the importance of universities and think tanks as audiences for and partners in outreach activities (STR, LitRev, interviews). While think tanks can furthermore provide new ideas/ incentives for EU outreach, academics – and particularly those with EU-related research – can serve as multipliers contributing their expertise in the field. Academia and think tanks can act as facilitators for promoting EU messages at the local level. The interviews have also revealed the need to further enhance cooperation between EU Delegations and educational institutions/ think tanks in order to increase visibility of existing programmes and initiatives.

Policy-makers

Policy-makers seem to be difficult group for EU PD messages: even though data from the different sources reveal that EU Delegations very actively engage with policy-makers in all 10 Strategic Partner countries, elite interviewees indicate that policy-makers often perceive the EU as a distant and in-transparent actor.

The EU addresses national and local government representatives mainly through traditional diplomatic means such as consultations on the governmental level and political summits. The analysed data (elite interviews) reveals a need to engage more with policy-makers on a community level – local and city level – to successfully transport the EU's messages. Therefore, local experts assess the sister cities programmes as a promising tool.

This approach seems to be particularly useful in large and/ or decentralised countries, such as Brazil, Canada, Russia or the USA, where populations are widely-spread and distant from the capital city. In addition, targeting policy-makers in specific regions may enhance EU overall visibility.

Civil society

The diverse nature of civil society poses a challenge to engaging with this group. A rather limited previous EU outreach to civil society groups mirrors this challenge. While being important multipliers of EU messages and values, civil society actors have on the one hand a very diverging knowledge of the EU, and on the other hand highly fragmented areas of interests/ influence. Accordingly, Delegations have to weigh which actors to support and what messages to send through cooperating with them.

Some civil society actors in the partner countries (e.g. Mexico) see the EU as a role model for civil society activity. In most SP countries, the civil society has a positive view on the EU (some of them are also major beneficiaries of EU programmes). EU Delegations' on-going programmes aim to increasingly target this group through supporting local civil society actors and initiatives.

Media

Media engagement is a highly complex issue across partner countries. While being a very important audience for Public Diplomacy outreach, media representatives are difficult to target. The scope of media representatives' influence and openness/ receptiveness heavily depends on local conditions such as the political system and the level of state influence on the media (e.g. in Russia, China). At the same time, the media sector is a significant distributor of EU messages to the general public, thereby influencing the public discourse on the EU. Hence, EU Delegations actively strive to establish solid relations with media representatives. Elite interviewees from all partner countries perceive the media sector as generally interested in EU policies.

General public

The general public is considered an essential target group by EU Delegations and elite interviewees alike and constitutes an important addressee for EU's messages and values. Data from all the sources examined for this analysis however reveal a considerable lack of knowledge about the EU among general publics across all 10 countries.

Although general public is aware of important political issues, for example the Greek debt crisis and the looming Brexit, specific knowledge about structures of EU institutions, initiatives or the EU in general is not widespread. Elites from half of the Strategic Partner countries (US, Japan, South Africa, China, India) emphasise the need to more actively target the general public through various outreach activities, such as targeted dissemination of information materials on the EU, social media outreach, (cultural) events or Europe trips. Overall, elites stress that approaches must be better tailored to the general public's key concerns, local hooks, but also to language, education and values.

4.2 Partner organisations

Brazil

Table 22. Brazil potential partners

Target Group – general	Target group – specific (types of institutions/ thematic areas)	Target group – specific – institutions	Target group – specific – individuals	Source
Business	Business Association	EU-Brazil Association	Luigi Gambardella	Media Analysis
Business	Business Association	Brazil-Germany Commerce Chamber	Wolfram Anders	Interview
Business	Business Association	CNI (Confederation of Brazilian Industries)	Soraya Rosar	CE
Business	Business Association	FIRJAN (Industry Federation of the State of Rio de Janeiro)	Mauro Laviola	CE
Business	Business Association	FIESP (Industry Federation of the State of São Paulo)	Thomaz Zanotto	LitRev
Academia & Think Tanks	Think Tanks	Centro Brasileiro de Relações Internacionais (CEBRI)	Leornado Neves	LitRev
Academia & Think Tanks	Think Tanks	Instituto Ethos	Jorge Abrahao	LitRev
Academia & Think Tanks	University	Pontificia Universidade Catolica in RJ (PUC-Rio) – International Relations Institute (IRI)	Andrea Ribeiro Hoffmann, Paula Sandrin	CC
Academia & Think Tanks	University	State University of Rio de Janeiro (UERJ) – Post Graduate Programme in International Relations (PPGRI)	Miriam Saraiva	LitRev
Academia & Think Tanks	University	Federal University Brasilia (UnB) – International Relations Institute (IREL)	Estevao Martins, Jose Sombra Saraiva	LitRev
Academia & Think Tanks	University	Federal University Brasilia (UnB) – International Relations Institute (IREL)	Antonio Lessa	LitRev
Academia & Think Tanks	University	Federal University Brasilia (UnB) – International Relations Institute (IREL)	Alcides Vaz	LitRev
Academia & Think	University	Federal University of Permanbuco (UFPE) –	Marcelo Medeiros	LitRev

Tanks		Department of Political Science		
Academia & Think Tanks	University	Universidade de Sao Paulo (USP) – International Relations Institute	Janina Onuki, Kai Lehmann, Amancio Oliveira	LitRev
Academia & Think Tanks	Research Funding Foundation	Rio de Janeiro Research Foundation (FAPERJ)		CE
Academia & Think Tanks	Research Funding Foundation	São Paulo Research Foundation (FAPESP)		CC
Policy makers	Federal Government	International Negotiations Department, Ministry of External Relations/ Itamaraty	Luciano Mazza	Interview
Policy makers	Federal Government	Ministry of Agriculture	Minister Katia Abreu	CC
Policy makers	Federal Government	Ministry of Development, Industry and Trade	Minister Armando Monteiro	CE
Policy makers	Federal Government	Diplomat, Europe Department, Ministry of External Relations/ Itamaraty	Leonidas Mello	Interview
Policy makers	Federal Government	Coordinator of Cooperation with Europe, Department of International Relations, Ministry of Science, Technology and Innovation (Assim/ MCTI)	Ana Lúcia Stival	Interview
Policy makers	Municipal Government	International Relations department of the city of Rio de Janeiro (Coordenadoria de Relações Internacionais -CRI)	Laudemar Aguiar	CE
Policy makers	Municipal Government	International Relations department of the city of São Paulo (Secretaria Municipal de Relações Internacionais e Federativas)	Leonardo Osvaldo Barchini Rosa	CE
Civil Society	NGO	Conectas Direitos Humanos		LitRev
Civil Society	NGO/ Civic engagement	Instituto Brasileiro de Análises Sociais e Econômicas (Ibase)	Cândido Grzybowski	LitRev, Interview
Civil Society	NGO/ Human rights	A Rede Brasileira Pela Integração dos Povos (REBRIP)		LitRev
Civil Society	NGO/ Human rights	Amnesty International Brazil https://www.amnesty.org/en/countries/america/brazil/		CC
Civil Society	NGO/ Humanitarian and development	Brazilian Red Cross		CC
Civil Society	NGO/ Environmental protection	Greenpeace Brazil		CC
Civil Society	NGO/ Public policy in environmental	World Wide Fund for Nature (WWF Brazil)		CC

	protection			
Civil Society	NGO/ Development	Federação de Órgãos para Assistência Social e Educacional	Letícia Rangel Tura	Interview
Civil Society	NGO/ Public policy in peace and social inclusion	Viva Rio		CC
Civil Society	NGO/ Environmental protection	SOS Mata Atlântica		CC
Civil Society	NGO	German Goethe Institute		STR
Civil Society	European foundations in Brazil	Rosa Luxemburgo Foundation	Ana Rüsche	CE
Civil Society	European foundations in Brazil	Friedrich Ebert Foundation	Thomas Manz	CE
Civil Society	European foundations in Brazil	Konrad-Adenauer-Foundation		STR
Civil Society	Private foundations	Fundacao Getulio Vargas (FGV)	Elena Lazarou, Oliver Stunkel	LitRev
Media	Television (Free TV)	Jornal Nacional (TV Globo)	Monica Maria Barbosa	
Media	Television (Pay TV)	Globo News	Filipe Barini	
Media	Magazine	Carta Capital	Antonio Luiz M. C. Costa	
Media	Business newspaper	Valor Economico	Humberto Saccomandi	Media Analysis
Media	Newspaper	Folha de Sao Paulo		Media Analysis
Media	Newspaper	O Globo	Sandra Cohen	Media Analysis
Youth	Students	National Students Union (UNE)	Camila Souza	STR
Other	Arts and culture	EUNIC cluster Brazil, Brasilia; EUNIC São Paulo	Brasilia: Sabine Plattner sabine.plattner@brasilia.goethe.org São Paulo: Eric Klug Eric.Klug@britishcouncil.org.br	SC
Other	Party Foundation	DEM - Fundacao Liberdade e Cidadania		LitRev
Other	Party Foundation	PSDB - Instituto Teotonio Vilela		LitRev
Other	Party Foundation	PT - Fundacao Perseu Abramo		LitRev
Other	Party Foundation	PSB - Fundacao Joao Mangabeira		LitRev

Canada

Table 23. Canada potential partners

Target Group – general	Target group – specific (types of institutions/ thematic areas)	Target group – specific – institutions	Target group – specific – individuals	Source
Business	Business Elites	Canada-Europe Round Table for Business (CERT) and Energy Round Table	Jason Langrish info@canada-europe.org	LitRev
Business	Business Elites	Member States chambers of commerce in Montreal Canadian German Chamber of Industry and Commerce	Anna-Lena Gruenagel info@carrefour-europe.org	LitRev
Business	Business Elites	EU Chamber of commerce in Toronto (EUCOCIT)	info@eucocit.com	LitRev
Business	European chambers of commerce	Vancouver office of Italian of commerce	BCCTC Vancouver chapter (UK)	CC
Business	European chambers of commerce	Vancouver office of UK chamber of commerce	Italian Chamber of commerce in Canada – West, iccbc@iccbc.com	CC
Business	European chambers of commerce	Quebec office of French chamber of commerce	Maryse Grob, Quebec city office, direction@ccfcquebec.ca ;	CE
Business	European chambers of commerce	News Brunswick offices of French chamber of commerce	Isabelle Lafargue-Ruel, News Brunswick office, ccfcra@dieppe.ca	CE
Business	Canadian provincial chambers of commerce	Fédération des chambres de commerce du Québec (FCCQ)/ Quebec Chamber of Commerce	Françoise Bertrand, CEO, francoise.bertrand@fccq.ca	CC
Business	Canadian provincial chambers of commerce	Alberta Chamber of Commerce (ACC)	Ken Kobly, President and CEO, kkobly@abchamber.ca	CE
Business	Canadian provincial chambers of commerce	Ontario Chamber of Commerce (OCC)	Karl Baldauf, Vice-president, karlbaldauf@occ.ca	CE
Business	Canadian provincial chambers of commerce	BC Chamber of Commerce	John Garson, President and CEO, jgarson@bcchamber.org	CE
Business	Law firms	Dentons	Xavier Van Overmeire, xavier.vanovermeire@dentons.com	LitRev
Business	Law firms	Lavery	Pierre-Marc Johnson,	LitRev

			pjohnson@lavery.ca	
Business	Law firms	McCarthy Tetrault	Jean Charest, jcharest@mccarthy.ca	LitRev
Business	Small and medium size business	Carrefour Europe (Quebec)	Anna-Lena Gruenagel, info@carrefour-europe.org	CC
Business	Small and medium size business	Trade Commissioners	Full list of contacts available here: http://www.tradecommissioner.gc.ca/english/find-trade-contacts-list.jsp?provids=001-CA&search=+Submit +	CC
Business	Small and medium size business	Canadian Federation of Independent Business (CFIB)	Dan Kelly, CEO, cfib@cfib.ca	CC
Business	Banks	Bank of Montreal, Royal bank of Canada		CC
Business	Big business	Canadian Council of Chief Executives	Ailish Campbell, Vice President, ailish@ceocouncil.ca	CC
Business	Sector-based industry associations		See contacts for Trade commissioners (based on sectors)	CC
Business	Energy sector	Canadian Association of Petroleum Producers	Tim MacMillan, President and CEO, tim.mcmillan@capp.ca	CE
Business	Agriculture	Ontario Federation of Agriculture (OFA)		CE
Business	Agriculture	Union des producteurs agricoles du Québec (UPA)		CE
Youth	Students	Canadian Federation of Students	info@cfs-fcee.ca	CE
Youth	Students	Canadian Student Leadership Association	Don Homan, Chair, dhoman@studentleadership.ca	CE
Youth	Students	DAAD Canada (German Academic Exchange Service)	Alexandra Gerstner, gerstner@daad.org (Toronto)	CE
Youth	Youth	GO International (work and travel abroad)	info@gointernational.ca	CE
Youth	Youth	Chantiers jeunesse (voluntary experience abroad)	cj@cj.qc.ca	CE
Academia & Think Tanks	Network of EU Centers of Excellence in Canada (five total)	EUCE Dalhousie (Halifax)	Andrea D'Sylva andrea.DSylva@dal.ca ;	LitRev
Academia &	Network of EU	EUCE Montreal	Catherine Villemer	LitRev

Think Tanks	Centers of Excellence in Canada (five total)		c.de.sainte.marie-villemer@umontreal.ca	
Academia & Think Tanks	Network of EU Centers of Excellence in Canada (five total)	Center for European Studies Carleton University (Ottawa)	Cathleen Schmidt cathleen.schmidt@carleton.ca	LitRev
Academia & Think Tanks	Network of EU Centers of Excellence in Canada (five total)	EUCE Alberta (Edmonton), Skirmante Tamelyte	Skirmante Tamelyte tamelyte@ualberta.ca	LitRev
Academia & Think Tanks	Network of EU Centers of Excellence in Canada (five total)	EUCE Victoria, Nicole Bates-Eamer	Nicole Bates-Eamer nbeamer@uvic.ca	LitRev
Academia & Think Tanks		CD Howe Institute (Toronto)	Daniel Schwanen, daniel@cdhowe.org	LitRev
Academia & Think Tanks		Canadian Center for Policy Alternatives (Ottawa)	Stuart Trew stuart@policyalternatives.ca	LitRev
Academia & Think Tanks		Fraser Institute (Vancouver but regional offices) (right wing)		LitRev
Academia & Think Tanks		The Broadbent Institute (left wing)		CE
Academia & Think Tanks		The Conference Board of Canada		LitRev
Academia & Think Tanks		Canadian International Council (Toronto and regional offices)		LitRev
Academia & Think Tanks		Canadian Global Affairs Institute (Calgary and Ottawa)	Andrew Rasiulis andrew.rasiulis@hotmail.com	LitRev
Academia & Think Tanks		Canadian Global Affairs Institute (Calgary and Ottawa)	Daryl Copeland (on Public Diplomacy)	LitRev
Academia & Think Tanks		Canadian Global Affairs Institute (Calgary and Ottawa)	Colin Robertson, cr@colinrobertson.ca	LitRev
Academia & Think Tanks		University of Waterloo	Andrew Cooper acooper@uwaterloo.ca (on Public Diplomacy)	CE
Academia & Think Tanks		Graduate School of Public and International Affairs (Ottawa)	Robert Hage, robert.hage@uottawa.ca	CE

Policy Makers	Central government	Department of Foreign Affairs/ Trade and Development Canada	<i>New government (fall 2015)</i>	CC and LitRev
Policy Makers	Central government	Bank of Canada	Stephen Poloz, Governor	CC
Policy Makers	Central government	Regional Science and Technology (RS&T) area		CC
Policy Makers	Central government	Competition Bureau	John Pecman, Commissioner of Competition	CC
Policy Makers	Central government	Office of the Auditor General of Canada	Michael Ferguson, Auditor General	CE
Policy Makers	Local governments	Toronto, Ottawa, Montreal, Vancouver, Calgary		CC
Policy Makers	Provincial level	Premiers		CC
Policy Makers	Provincial level	Council of the Federation	Loretta O'Connor, Executive Director (secretariat), Loretta@canadaspremiers.ca	CC
Policy Makers	Provincial level	Provincial Auditor Generals		CC
Policy Makers	Other	Assembly of First Nations (AFN)	Perry Bellegarde, AFN National Chief	CC
Policy Makers	Parliament of Canada	Canada-Europe Parliamentary Association	<i>New parliament fall 2015</i>	LitRev
Policy Makers	Parliament of Canada	Committee on Foreign Affairs and International Development	<i>New parliament fall 2015</i>	LitRev
Policy Makers	Parliament of Canada	Committee on International Trade	<i>New parliament fall 2015</i>	LitRev
Civil society	NGO	Council of Canadians (anti-free trade)	Maud Barlow, Chairperson, inquiries@canadians.org (note: central office in Ottawa and regional offices in provinces)	CE
Civil society	NGO	Greenpeace Canada		CE
Civil society	NGO	WWF Canada (observer status at Arctic Council) - Toronto head office + regional offices, including Northern territories	ca-panda@wwfcanada.org	CE
Civil society	NGO	Inuit Circumpolar Council - Canada	Okalik Eegeesiak, Chair, csimon@inuitcircumpolar.com (more NGOs here: http://www.polarcom.gc.ca/eng/content/canadian-non-governmental-organizations)	CE
Civil society	NGO	Congress of Aboriginal People	Gilles Benoit,	CE

			Assistant to the executive, g.benoit@abo-peoples.org	
Civil Society	The Arctic	Hunters and trappers organizations	http://www.polarco.m.gc.ca/eng/content/canadian-non-governmental-organizations	CC
Civil Society	Climate protection NGOs	Canada Climate Action network	Executive Director Dr. Louise Comeau	CE
Media	Regional media	La Presse (Quebec)	Agnès Gruda, international news journalist	STR
Media	National media	CBC News	Margaret Evans, Europe correspondent, margaret.evans@cbc.ca	STR
Media	National media	Radio-Canada	Jean-François Bélanger, Europe correspondent, Jean-Francois.Belanger@radio-canada.ca	CE
Media	National media	The Globe and Mail	Eric Reguly, Europe correspondent; Susan Sachs, Foreign news editor	CE
Other	Arts and culture	Canada Council for the Arts	Francier Bercier, Assistant to the Chair and Board, Francine.Bercier@canadacouncil.ca	CE
Other	Arts and culture	Toronto Arts Council		CE
Other	Arts and culture	Conseil des arts de Montréal		CE
Other	Arts and culture	Ottawa Arts Council		CE
Other	Arts and culture	Community Arts Council of Vancouver		CE
Other	Arts and culture	Calgary Arts Development		CE
Other	Arts and culture	EUNIC Canada (cluster of European institutes for culture)	Manfred Stoffl, Goethe-Institut Montreal, Manfred.Stoffl@Montreal.goethe.org (see list of cluster members: http://canada.eunic-online.eu/?q=eunic-cluster-members)	CE
Other	Research, science and technology	ERA-Can + network	info@era-can.net (full list of contact points depending on	CE

			area: http://www.era-can.net/canada/ncps/	
Other	International organisations/ forums	International Civil Aviation Organization (Montreal)	EU delegate for ICAO Christopher Ross	LitRev
Other	International organisations/ forums	North-West Atlantic Fishery Organization (Halifax)	Fred Kingston, Executive Secretary, FKingston@nafo.int	LitRev
Other	International organisations/ forums	Arctic Council	Contact Environment Canada (Minister of the Environment) (secretariat is in Norway)	LitRev

China

Table 24. China potential partners

Target Group - general	Target group - specific (types of institutions/ thematic areas)	Target group - specific - institutions	Target group - specific - individuals	Source
Youth	Students at major universities	Fudan University in Shanghai	Yang Yuqing, President of the Student Union at Fudan 12307090021@fudan.edu.cn	CC
Youth	Students at major universities	Peking University		CE
Youth	Students at major universities	Tsinghua University		CE
Youth	Students	GreenSOS (Green Student Organizations Society)	office@greensos.org	STR
Youth	Young employees in European enterprises in China	Alcatel-lucent RU China	CEO: Luis Martinez-Amago info@alcatel-sbell.com.cn	CE
Business	Business Elites	The European Union Chamber of Commerce in China	President Jörg Wuttke and his colleagues	LitRev
Business	Business Elites	China Europe International Business School	President Pedro Nueno and his colleagues	LitRev
Academia & Think Tanks	Academia	Center for China-EU Relations at Fudan University	Zhimin Chen and his colleagues	LitRev
Academia & Think	Think Tanks	Anbound Consulting (high importance)	CEO: Gong CHEN, aic@anbound.com.c	CC

Tanks			n	
Academia & Think Tanks	Think Tanks	Institute of European Studies at Chinese Academy of Social Sciences	Hong Zhou and her colleagues	LitRev
Academia & Think Tanks	Universities	Centre for European Studies, Sichuan University	Prof. Jian SHI and his colleges	CC
Academia & Think Tanks	Universities	Centre for European Studies, People's University of China	Prof. Xinning SONG and his colleague;	CC
Academia & Think Tanks	Universities	Centre for European Studies, People's University of China	Prof. Wang Yiwai, 王義桅	CC
Policy Makers	Federal Government	Ministry of Foreign Affairs/ Department of European Affairs	Wenyan, Fu, fu_wenyan@mfa.gov.cn	LitRev
Policy Makers	Federal Government	Ministry of Commerce		
Policy Makers	Federal Government	Ministry of Science and Technology		
Policy Makers	Federal Government	Ministry of Finance		LitRev
Policy Makers	Federal Government	Ministry of Education		LitRev
Policy Makers	Federal Government	National Development and Reform Commission		
Policy Makers	Federal Government	Ministry of Culture		LitRev
Policy Makers	Central Committee	department of publicity		LitRev
Policy Makers	Central Committee	International department	Yang Du, duyang0918@163.com	LitRev
Civil Society	NGOs	China Association for NGO Cooperation	wangxiangyi@cang.org	CC
Civil Society	NGOs	Global Village of Beijing	xinchao@gvbchina.org.cn	CC
Civil Society	NGOs	Shanghai Roots & Shoots	info@jgi-shanghai.org	CC
Civil Society	NGOs	Oxfam in China (Hong Kong)		CC
Civil Society	NGOs	China Foundation for Poverty Alleviation	http://www.fupin.org.cn	CC
Civil Society	Labour Unions	All-China Federation of Trade Unions		CC
Civil Society	NGOs	Western Returned Scholars Association/ Chinese Overseas-Educated Scholars Association	wrsa1913@gmail.com ; wrsa_xcb@126.com	LitRev
Media	Press	Global Times (lead writers)	Lead writers 柳玉鵬 陶短;	LitRev
Media	Press	Global Times (EU correspondents)	駐德國特約記者 青木; 本報駐希臘特約記者 梁曼瑜	LitRev

Media	Press	China Daily		
Media	Press	People's Daily (leading journalists in EU-related issues)	Tianren Sun and Lejun Wu	LitRev
Media	Press	People's Daily (Foreign correspondents)	本报驻比利时记者 吴刚, 本报驻比利时记者 任彦, 本报驻意大利记者 韩秉宸	LitRev
Media	TV	CCTV (China Central Television)		CE
Media	News agencies	Xinhua Agency		CE
Media	Business daily	21st century Business Herald	特派記者 師琰, 編輯 李豔霞, 本報記者 慕麗潔, 編輯 李關雲	LitRev
Media	Online Film Festival			STR
Media		Leading journalists in EU-related issues	Minghao Zhao and Jie Zhang	LitRev
General Public	Ordinary people	Tourist agencies such as China Travel Service		LitRev
General Public	Internet users	Weibo hosts on international affairs		LitRev
Other	Arts and culture	EUNIC China	Szonja Buslig bhci@hungarianculture.cn	SC

India

Table 25. India potential partners

Target Group – general	Target group – specific (types of institutions/thematic areas)	Target group – specific – institutions	Target group – specific – individuals	Source
Policy Makers	Local politicians	Political leaders in key states		LitRev
Policy Makers	Defence	Officials serving and retired from the defence forces		LitRev
Policy Makers	Parliament – Rajya Sabha	Members of Rajya Sabha	Arun Jaitley	LitRev
Policy Makers	Parliament – Rajya Sabha	Members of Rajya Sabha	Prakash Javadekar	LitRev
Policy Makers	Parliament – Lok Sabha	Lok Sabha Standing Committee on External Affairs		LitRev
Policy Makers	Parliament – Lok Sabha	Members of Lok Sabha	Shartrughan Sinha	LitRev
Policy Makers	Parliament – Lok Sabha	Members of Lok Sabha	Rajiv Pratap Rudy	LitRev
Policy Makers	Ministry of External Affairs	Joint Secretary (EW)	K. Nandini Singla	LitRev
Policy Makers	Ministry of External Affairs	Joint Secretary (CE)	G.V. Srinivas	LitRev
Political	BJP	Foreign and Overseas Friends of	Vijay Chauthaiwale	CE

Parties		BJP Cell - Head		
Political Parties	Indian National Congress	Foreign Affairs Department	Karan Singh	CE
Political Parties	Indian National Congress	Foreign Affairs Department	Anand Sharma	CE
Political Parties	Indian National Congress	Foreign Affairs Department	Manish Tiwari	CE
Business	Energy Sector	Confederation of Indian Industry		CC
Business	Energy Sector	The Federation of Indian Chambers of Commerce and Industry		CC
Business	Energy Sector	Tata Energy Research Institute		CC
Business	Business elites	Business leaders		LitRev
Business	Business elites	Business Associations	CII	LitRev
Business	Business elites	Business Associations	FICCI	LitRev
Business	Business elites	Business Associations	ASSOCHAM	LitRev
Business	IT	Wipro	G.V. Shashidhar	CE
Business	Publishing	Seminar Magazine	Malvika Singh	CE
Business	Textile	Radhnik Exports	Nadeem Iqbal	CE
Business	Corporate conglomerate	Avantha Group	Shivani Dang	CE
Academia & Think Tanks	Agriculture	Indian Council for Agricultural Research		Interview
Academia & Think Tanks	Defence	Institute of Defense Studies and Analyses	Jayant Prasad, Director	LitRev
Academia & Think Tanks		Observer Research Foundation	Samir Saran, Vice President	LitRev
Academia & Think Tanks	Educational institution	Jamia Millia Islamia University/ Centre for Peace and Conflict Resolution	Sujit Dutta	CE
Academia & Think Tanks		Indian Council of World Affairs	Nalini Surie, Director-General	LitRev
Academia & Think Tanks		Jawaharlal Nehru University	Centre for European Studies	LitRev
Academia & Think Tanks		European Business and Technology Centre		LitRev
Academia & Think Tanks		Jindal School of International Affairs	Sreeram Sunder Chaulia (Dean)	LitRev
Academia & Think Tanks		Gateway House, Indian Council on Global Relations, Mumbai	Neelam Deo, Director	CE
Academia & Think Tanks		Centre for European Studies, Pudicherry University	B. Krishnamurthy	CE
Academia & Think		Jadavpur University	School of International	CE

Tanks			Studies	
Academia & Think Tanks		Delhi Policy Group	Radha Kumar	CE
Academia & Think Tanks	Energy and climate change	The Energy and Resources Institute		Interview
Youth	Youth wings	NSUI		LitRev
Youth	Youth wings	BJP		LitRev
Youth	Youth wings	AISA		LitRev
Civil Society	NGO	Greenpeace	Karuna Raina	LitRev
Civil Society	NGO	Apne Aap Women Worldwide, an Initiative to end Sex-Trafficking	Ruchira Gupta	LitRev
Civil Society	NGO – Human rights	People’s Watch	Henry Tiphagne	CE
Civil Society	NGO	Prayas		LitRev
Civil Society		Save the Children	Piyali Sarkar	LitRev
Civil Society		Red Cross		LitRev
Civil Society		Centre for Social Research	Ranjana Kumari, Director	LitRev
Civil Society	People’s movements	National Rights for People Movements		CC
Civil Society		Centre for Science and Environment		
Media	Press	The Hindustan Times	Pramit Pal Chaudhuri, Foreign Affairs Editor	CC
Media	Press	The Hindustan Times	Lalita Panicker	CE
Media	Press	The Hindu		LitRev
Media	Press	The Indian Express	C. Raja Mohan	LitRev
Media	Press	The Indian Express	Shekar Gupta	CE
Media	Press	The Times of India	Indrani Bagchi	LitRev
Media	Press	The Times of India	Nitin Sethi	CE
Media	Press	The Economic Times	Dipanjan Roy Choudhury	LitRev
Media	Press	The Economic Times	T.K Arun	CE
Media	Press - Magazine	Tehelka	Shantanu Guha Roy	CE
Other	Arts and culture	EUNIC India, New Delhi	Anna Tryc-Bromley Anna.Tryc@msz.gov.pl	SC

Japan

Table 26. Japan potential partners

Target Group – general	Target group – specific (types of institutions/ thematic areas)	Target group – specific – institutions	Target group – specific – individuals	Source

Academia & Think Tanks	Universities	Keio University	Prof. Yuichi Hosoya Prof. Katsuhiko Shoji	CC
		Waseda University	Prof. Hidetoshi Nakamura Prof. Paul Bacon	CE
		University of Tokyo	Prof. Yuichi Morii	CE
		GRIPS (National Graduate Institute for Policy Studies)	Prof. Yoko Iwama	CE
		University of Kyushu	Prof. Machiko Hachiya	CE
		Ritsumeikan University	Prof. Kaoru Hoshino	CE
Academia & Think Tanks	EU Institutes in Japan (EUIJ)	EUIJ Waseda http://www.euij-waseda.jp/eng/	Prof. Hidetoshi Nakamura Prof. Paul Bacon	STR
Academia & Think Tanks	EU Institutes in Japan (EUIJ)	EUIJ Kansai http://euij-kansai.jp/index_en		CE
Academia & Think Tanks	EU Institutes in Japan (EUIJ)	EUIJ Kyushu http://www.euij-kyushu.com/index.html	Prof. Machiko Hachiya	CE
Academia & Think Tanks	EU Studies Institute (EUSI).	EUSI Tokyo http://eusi.jp/en/	Prof. Yuichi Hosoya (Keio); Prof. Yumiko Nakanishi (Hitotsubashi)	STR
Academia & Think Tanks	Think Tank	Japan Institute of International Affairs (JIIA) http://www2.jiia.or.jp/en/	Amb. Yoshiji Nogami; Amb. Shingo Yamagami; Ms. Miho Okada	LitRev
Academia & Think Tanks	Think Tank	Tokyo Foundation http://www.tokyofoundation.org/en/	Mr. Masahiro Akiyama; Mr. Tsuneo 'Nabe' Watanabe; Mr. Ippeita Nishida	LitRev
Academia & Think Tanks	Think Tank	Sasakawa Peace Foundation (SPF) https://www.spf.org/e/	Ms. Junko Chano; Ms. Risa Arai	LitRev
Academia & Think Tanks	Think Tank	Keizai Koho Center http://www.kkc.or.jp/english/index.html		LitRev
Academia & Think Tanks	Think Tank (government)	National Institute for Defense Studies (NIDS) http://www.nids.go.jp/english/index.html	Mr. Tomonori Yoshizaki; Dr. Michito Tsuruoka	CE
Academia & Think Tanks	Think Tank (government)	JICA Research Institute http://jica-ri.jica.go.jp/index.html	Mr Ichiro Tambo	CE

Civil Society	human rights groups	Amnesty International Japan http://www.amnesty.or.jp/en/index.html		CC
		Human Rights Now http://hrn.or.jp/eng/		
Civil Society	grassroots organisations	Scout Association of Japan http://www.scout.or.jp/e/index.html		CC
		EMA Japan http://emajapan.org/aboutemajapan		
Media	TV	NHK TV Asahi TV Tokyo TBS Fuji TV Nihon TV	Mr Takayuki Katsuki (NHK)	CC
Media	Newspapers	Nikkei Yomiuri Asahi Mainichi Sankei	Mr Tetsuro Kosaka (Nikkei) Mr Michio Hayashi (Yomiuri) Mr Norito Kunisue (Asahi)	CE
Media	Others	Shinchosha https://www.shinchosha.co.jp/ Bungeishunju http://www.bunshun.co.jp/		CE
Business	Small and medium size business	SME Support, Japan http://www.smrj.go.jp/english/index.html		CC
		National Federation of Small Business Associations http://www.chuokai.or.jp/en/index.html		CE
Business	Business community	Keidanren (Japan Business Bureau)	Secretary General/ Director, International Bureau	LitRev
Business			JETRO	LitRev
Policy Makers	Ministry of Foreign Affairs (MOFA)	European Affairs Bureau	DG/ Deputy DG/ Director, European Policy Division/ Director, Western Europe Division/ Director, Central and Eastern Europe Division	LitRev
Policy Makers	Ministry of Foreign Affairs (MOFA)	Foreign Policy Bureau	DG/ Deputy DG/ Director, National Security Policy Division	CE
Policy Makers	Ministry of Foreign Affairs	International Cooperation Bureau	DG/ Deputy DG	CE

	(MOFA)			
Policy Makers	Ministry of Foreign Affairs (MOFA)	Public Diplomacy Division	Director	CE
Policy Makers	Ministry of Economics, Trade and Industry (METI)	Trade Policy Bureau	DG/ Deputy DG/ Director, Europe Division	LitRev
Policy Makers	Ministry of Finance	International Bureau	DG/ Deputy DG	LitRev
Other	Arts and culture	EUNIC Japan, Tokyo	Mirosław Błaszczak, Miroslaw.Blaszczak@msz.gov.pl	SC

Mexico

Table 27. Mexico potential partners

Target Group – general	Target group – specific (types of institutions/ thematic areas)	Target group – specific – institutions	Target group – specific – individuals	Source
Business	Economic, trade, financial	COPARMEX Confederación Patronal de la República Mexicana (Employers association)		LitRev
Business	Economic, trade, financial	Consejo Coordinador Empresarial (Business Coordinating Council)		LitRev
Youth	Mexican students (for educational exchanges)			CC
Academia	Economic, politics, foreign affairs	CIDE (Center for Economic Research and Teaching)	Jean Monnet Chair lorena.ruano@cide.edu	LitRev
Academia	Economic, politics, foreign affairs	ITAM (Technological Autonomous Institute of Mexico)	Jean Monnet Chair Stephan Sberro ssberro@itam.mx	LitRev
Academia	Economic, politics, foreign affairs	UNAM (National Autonomous University of Mexico)/ UNAM European Union Information Centre (EUi); European Union Studies Programme (PESUE);	PESUE Director Alejandro Chanona alejandro_chanona@hotmail.com	

Academia	Economic, politics, foreign affairs	UNAM (National Autonomous University of Mexico)/ UNAM European Union Information Centre (EUi); European Union Studies Programme (PESUE);	International Relations Center of the Political and Social Sciences Faculty (CRI - FCPyS): Consuelo Davila consuelo_davila@yahoo.com	LitRev
Academia	Economic, politics, foreign affairs, trade	Universidad Veracruzana		LitRev
Think Tanks	Economic, politics, foreign affairs, trade	COMEXI (Mexican Council on Foreign Affairs)		LitRev
Think Tanks	Economic, politics, foreign affairs, trade	CEI-COLMEX: Center for International Studies-Colegio de Mexico		LitRev
Think Tanks	Development	Red Mexicana de Cooperación Internacional y Desarrollo (REMECID)		LitRev
Think Tanks	International development	Meritorious Autonomous University of Puebla (BUAP)	Juan Pablo Prado Llallande, jplallande@gmail.com	LitRev
Think Tanks	International development	Dr. Jose Maria Luis Mora Research Institute	Simone Lucatello, slucatello@mora.edu.mx	LitRev
Academia & Think Tanks	Academic institutions that offer BAs in International Relations	In DF; Guadalajara; Monterrey; Tijuana; Chetumal	Youth in these programs	CC
Academia & Think Tanks	Political party-affiliated Think Tanks that produce policy papers and positions on intl relations	Colosio Foundation (Institutional Revolutionary Party)	José Rivera Banuet, CF 01 (55) 5282.1085	CC
Academia & Think Tanks	Political party-affiliated Think Tanks that produce policy papers and positions on intl relations	Rafael Preciado Foundation (National Action Party)	Juan Francisco Molinar Horcasitas, RPF infomacion@fundacion.pan.org.mx	CC
Academia & Think Tanks	Political party-affiliated Think Tanks that	Lázaro Cárdenas Foundation (Citizen Movement Party)	Alejandro Chanona Burgete alejandro_chanona	CE

	produce policy papers and positions on intl relations		@hotmail.com	
Academia & Think Tanks		Mexican International Studies Association (AMEI)		CC
Policy Makers	Legislative	Commissions of External Relations of the Mexican Senate and of the Chamber of Deputies		CC
Policy Makers	Ministry of Foreign Affairs; political parties			CC
Policy Makers	Local government	External relations sections and offices on state level aimed at enhancing sector-level intl cooperation (environment, education, etc)	Oaxaca, Mexico, Jalisco, etc	CC
Policy Makers	Local government	External relations sections and offices on city level aimed at enhancing sector-level intl cooperation (environment, education, etc)	Mexico DF, Cancun, Acapulco	CC
Civil Society	NGOs - human rights	Centro de Derechos Humanos de la Montaña 'Tlachinollan' A.C.		LitRev
Civil Society	NGOs – human rights	FUNDAR Analysis and Research Center	Sergio Aguayo saguayo@colmex.mx	CE
Civil Society	NGO Development	Centro Mexicano de Derecho Ambiental (CEMDA), A.C. (Mexican Center for Environmental Law)	Director Gustavo Alanís Ortega galanis@cemda.org.mx	CE
Civil Society	NGO Anti-corruption	RRC Red por la Rendición de Cuentas (Network for Accountability)	Mauricio Merino mauricio.merino@cemda.org.mx	CE
Civil Society	NGOs - human rights	Comisión Mexicana de Defensa y Promoción de los Derechos Humanos A.C		LitRev
Civil Society	NGOs - rule of law; reduction of criminal activity; anti-corruption	Peace Brigades International PBI-México		LitRev
Civil Society	NGOs - development	Red Mesa de Mujeres de Ciudad Juárez, A.C.		LitRev
Civil Society	NGOs - development	OXFAM Mexico	contacto@oxfam.org.mx	LitRev
Civil Society	NGOs - security	CASEDE (Collective for Security Analysis with Democracy)	President, Raúl Benítez raulmanaut@hotmail.com	LitRev

			il.com Technical Secretary, Georgina Romero colectivoseguridad@yahoo.com.mx	
Media	TV networks; radio and online	Media that reaches audience that consumes information from morning, noon and early night radio shows in other networks	Multivision or Canal 22 Online: Milenio and El Financiero	LitRev
Media	Major TV networks	Televisa and TV Azteca		LitRev
Media	TV and radio	CNN en español (TV and radio)	Carmen Aristeguii	LitRev
Media	TV	Mexican Congress Channel (TV)	Rina Mussali	LitRev
Media	TV	El Financiero Bloomberg, TV	Leonardo Kourchenko	LitRev
Media	Radio	Sigma International Radio Ibero	Alfonso Basilio (Sigma)	LitRev
Media	Radio	Stereocien Radio	Leonardo Curzio (Stereocien)	LitRev
Media	Press	El Universal		LitRev
Media	Press	La Jornada		LitRev
Media	Press	El Financiero		LitRev
Media	Press - magazine	Proceso magazine		LitRev
General Public	Those w/ contact w/ EU Delegation -	via Europe-trips as prizes for competitions (requires EU to budget for these in advance)		CC
Other	Arts and culture	EUNIC cluster Mexico, Mexico DF	Reinhard Maiworm maiworm@mexiko.goethe.org	SC
Other		European foundations working with ME political parties and NGOs	Friedrich Ebert Konrad Adenauer	CC

Russia

Table 28. Russia potential partners

Target Group - general	Target group - specific (types of institutions/ thematic areas)	Target group - specific - institutions	Target group - specific - individuals	Source
Business		Leading energy Company	Gazprom, Gazprom@gazprom.ru	LitRev
Business		Chamber of Commerce and Industry of the Russian Federation	http://tpprf.ru/en/	CE
Business		Business Ombudsman in Russia	http://ombudsmanbiz.ru/	CE
Business	Labour Unions	Center for Labour Rights Connections to main labour unions	http://trudprava.ru	CE
Youth	Students and			CC

	teachers of various levels of Russia's education system			
Youth	Student organisation	Russian Student Union	http://russiansu.ru/	CE
Youth	Student organisation	MSU Student Union	http://www.student-union.ru/	CE
Academia		MGIMO (Moscow State Institute of International Relations, Ministry of Foreign relations)	http://www.mgimo.ru/eng/	CC
Academia		IMEMO (Institute of World Economy and International Relations, Russian Academy of Science)	http://www.imemo.ru/en/	CC
Academia	Non-proliferation	Centre for International Security at the Russian Academy of Sciences/ Head of Centre	Alexei Arbatov arbatov@carnegie.ru ; arbatov@imemo.ru	LitRev
Academia	Comprehensive research on Europe; capable to influence youth, academic elite, Think Tanks	The Institute of Europe, Russian Academy of Science	Dr. Gromyko, Alexey Anatolievich, phone 8 (495) 692-21-02	LitRev
Academia	Public finance, intergovernmental fiscal relations, fiscal federalism and regional and municipal development	Institute for Public Finance Reform	Phone: +7-495-691-67-89; email: irof@irof.ru	LitRev
Academia	Domestic influence on youth, academics, intellectual elite	Higher School of Economics; Faculty of World Economy and International Affairs - Professor of Dept of International Affairs (publishes in 'Russia in Global Affairs', 'Valdai Club')	Maxim Bratersky mbratersky@hse.ru . 7 (495) 772-9590*22569	LitRev
Academia	Public opinion research; Sociological research; Analysis of current situation	Levada Analytical Center - Director	Lev Gudkov Phone: +7-499-755-40-30	CE
Think Tanks	Foreign and security policy	Carnegie Moscow Center	Director: Dmitri Trenin +7-495-935-89-04	LitRev
Think Tanks	Russia's foreign policy; Russia-	Centre for European Security	Political analyst: Parkhalina,	LitRev

	NATO relations; European security		Tatiana Glebovna parkhalina@ini.on.ru	
Think Tanks	Security policy; Non-proliferation	PIR Center	Director: Albert Zulkharneev	CE
Think Tanks	Human rights watchdog	Memorial	http://www.memorial.ru/	CC
Policy makers	Political Parties	YABLOKO (Russian Democratic Party)	http://www.yabloko.ru/	CC
Policy makers	State Agencies	Agency for strategic initiatives (ASI)	http://www.asi.ru/eng/	CC
Policy makers	State Agency providing support to civil society	Alexander Gorchakov Public Diplomacy Fund	http://gorchakovfund.ru/en/	CC
Policy makers	Human Rights	Presidential Council for Civil Society and Human Rights	Chairman of the Council: Fedotov, Mikhail, mfedotov@hse.ru	LitRev
Policy makers	Human Rights	Presidential Civil Society and Human Rights Council	Polyakov, Leonid Vladimirovich, a member of the lpolyakov@hse.ru	LitRev
Policy makers	Human Rights; Development of Civil Society	Russia's Presidential Commission on Modernization and Technology	Head of Commission: Auzan, Aleksandr auzan@inp.ru	LitRev
Policy makers	Human Rights; National security	Presidium of the Council on Foreign and Defence Policy	Chairman: Sergey Karaganov skaraganov@hse.ru , cfdp@online.ru	LitRev
Civil society	NGOs: Western policies towards Russia; Russia's contemporary politics	Polity Foundation	President: Nikonov, Vyacheslav info@polity.ru	LitRev
Civil society	NGOs: Eurasian security; NATO; peacekeeping operations; arms control	Centre for Political and International Studies	Director: Nikitin, A., anik@orc.ru	LitRev
Civil society	Domestic influence on	Activist - All-Russian movement 'For Human Rights'	Lev Ponomaryov (8-	LitRev

	ruling elites and civil groups		495-638-30-09)	
Civil society	NGOs	Creative Diplomacy (NGO with connection to the state)	http://www.picreadi.com	CC
Media	Modern Russian ideology, Russian foreign policy, Russia's place in the world order, EU economic crisis	Carnegie Moscow Center	Senior associate (ex senior editor of independent news website Slon.ru): Alexander Baunov +7-495-935-89-04	LitRev
Media	Press	Independent newspaper	Nezavisimaya gazeta	LitRev
General public	Mobile and educated; Middle-class; educated youth in big cities			CE
Policy makers; Political Parties	Mobile and educated; Middle-class; educated youth in big cities	People's Freedom Party	https://parnasparty.ru/	CE
Foundation	Mobile and educated; Middle-class; educated youth in big cities	Foundation to Fight Corruption	https://fbk.info/	CE
Other	Art and culture	EUNIC cluster Russia, Moscow; EUNIC St Petersburg	Simon Mraz Simon.MRAZ@bmeia.gv.at ; St Petersburg	SC
Other	NB on regions	Regions closer to Europe	Kaliningrad, Karelia, St. Petersburg	LitRev

South Africa

Table 29. South Africa potential partners

Target Group – general	Target group – specific (types of institutions/ thematic areas)	Target group – specific – institutions	Target group – specific – individuals	Source
Youth	Students	African Union Student Alliance	http://ausaausa.tumblr.com/	CC
Civil Society	Grassroots NGOs working on development	Fostering Local Wellbeing (FLOW)	Anna Cowen, Project Leader anna@meshfield.com	CC

Civil Society	Social movements and high visibility NGOs	Action Research Newtwork for a Wellbeing Economy in Africa	www.wellbeing-economy.org	LitRev
Civil Society	Social movements and high visibility NGOs	Right to Know Campaign	Coordinator: Mark Weinberg Tel: 0214471000 Email: mark@r2k.org.za	LitRev
Business	Cooperative associations	South African Organic Sector Organisation (SAOSO)	info@saoso.org	CC
Business	Cooperative associations	South African National Apex Cooperative	www.sanaco.coop	CC
Business	Small business	National Small Business Chamber	info@nsbc.org.za Phone: 0861 72 6722. Address: 1st Floor, Block D Wellness World Corporate Park Beethoven Str Hartbeespoort 0240	CC
Business	Business Elites	Business Unity South Africa www.busa.org.za	Chief Executive Officer: Ms. Khanyisile Kweyama khanyisile.kweyama@busa.org.za	LitRev
Business	Business Elites	SA Chamber of Commerce and Industry	Alan Mukoki, CEO ceo@sacci.org.za 0114463800	LitRev
Academia & Think Tanks	Universities	Gordon Institute of Business Sciences	Nicola Kleyn, Dean kleynn@gibs.co.za	CC
Academia & Think Tanks	Universities	Centre for the Study of Governance Innovation, University of Pretoria	www.governanceinnovation.org Dr. Camilla Adelle, camilla.adelle@up.ac.za	CC
Academia & Think Tanks	Research groups working on alternative energy	Sustainability Institute	Prof. Mark Swilling, Director Mark.Swilling@spl.sun.ac.za	CC
Academia & Think Tanks	Universities	European Union Studies Association of Sub-Saharan Africa	http://governanceinnovation.org/the-european-studies-association-of-sub-saharan-africa-esa-ssa/ Dr. John Kotsopoulos, john.kotsopoulos	CC

			@up.ac.za	
Academia & Think Tanks	Universities	UNESCO-UNU Chair in Regional Integration	Dr. Chris Nshimbi, Christopher.nshimbi@up.ac.za www.regionswithoutborders.org	CC
Academia & Think Tanks	Think Tanks	Institute for Global Dialogue	Dr. Siphamandla Zondi, Director zondi@igd.org.za	CC
Academia & Think Tanks	Think Tanks	Mapungubwe Institute for Strategic Reflection (MISTRA)	Dr. Joel Netshitenzhe, Executive Director www.mistra.org.za	CC
Academia & Think Tanks	Think Tanks	Institute for Security Studies	Dr. Jakkie Cilliers, Director jcilliers@issafrica.org	CC
Policy Makers	Government	Department of Economic Development	Ebrahim Patel, Minister	CC
Policy Makers	Government	Department of International Relations and Cooperation - Policy, Research and Analysis Unit	Mr Fadl Nacerodien, Director nacerodienf@dirco.gov.za	LitRev
Media	Newspaper	Business Day	Editor: Songezo Zibi ZibiS@bdlive.co.za	CC
Media	Newspaper	The Sowetan	Editor: Mpumelelo Mkhabela mpumelelom@sowetan.co.za	STR
Other	Art and culture	EUNIC South Africa, Johannesburg	Norbert Spitz Norbert.Spitz@Johannesburg.goethe.org	SC
Other	Social innovation and communication	Innovation Hub	Phone: +27 12 844 0000 info@theinnovationhub.com	CC
Other	Social innovation and communication	JumpStarter (a social innovation network)	customerservice@jumpstarter.co.za UNIT A108 WOODSTOCK EXCHANGE 66 - 68 Albert Road, Woodstock, 7925, Cape Town	CC

South Korea

Table 30. South Korea potential partners

Target Group – general	Target group – specific (types of institutions/ thematic areas)	Target group – specific – institutions	Target group – specific – individuals	Source
Business	Korean business in EU	Korean factories in Europe (especially in Poland)	Samsung R&D Center in Poland http://rd.samsung.pl/	LitRev
Business	Korean business in EU	Korean factories in Europe (especially in Poland)	LG Electronics Poland http://www.lg.com/pl - CEO Mr. Cho, Junho	LitRev
Business	Specific sectors for EU-South Korea cooperation	bio-industry, medical device industry, pharmaceuticals, automotive industry, and investment banking		CC
Business		LSIS Co. Ltd. Futuring Smart Energy	CEO Mr. Koo, Jakyun	LitRev
Business		Hyundai Research Institute (HRI)	Former President Mr. Ha, Taehyung Current President, Dr. Kang, Insoo	LitRev
Business	Trade-Investment Promotion Agency	KOTRA		CC
Business	Chambers of Commerce	European Union Chamber of Commerce in Korea		CC
Business	Consulting Companies/ Law firms with EU expertise			CC
Academia	Jean Monnet EU Centres across Korea	KU-KIEP-SBS EU Centre, http://www.ku-kiep-sbs.org/	• KU-KIEP-SBS: Prof. Park, Sunghoon shpark@korea.ac.kr	LitRev
Academia	Jean Monnet EU Centres across Korea	Yonsei-SERI EU Centre http://www.yonsei.org/	Yonsei-SERI: Prof. Lee, Yeonho	LitRev
Academia	Jean Monnet EU Centres across Korea	HUFS-HRI EU Centre http://www.hufs-hri.org/	Prof. Kim, Sihong	LitRev
Academia	Jean Monnet EU Centres across Korea	YU-EU Centre (Yeungnam University) http://eucentre.yu.ac.kr/eucentre	Prof. Park Insoo	LitRev

		/index.htm		
Academia	Jean Monnet EU Centres across Korea	PNU-EU Centre (Pusan National University) http://www.eucenter.pusan.ac.kr/	Prof. Yi, Chae-Deug	LitRev
Academia	Expansion of EU-ICI ECP Programme for South Korea			CC
Academia	Advances in Structural Engineering and Mechanics(ASEM)	Via ASEM-DUO fellowship programme		CC
Think Tanks	Government-funded institute	Korean Institute for International Economic Policy (KIEP) http://www.kiep.go.kr/	Head of KIEP Europe team: Dr. Yoo-Duk Kang	LitRev
Think Tanks		Asan Institute for Policy Studies	Senior Researcher and Centre Director of Public Opinion: Dr. Jiyeon Kim	LitRev
Policy makers	State Commissions	National Human Rights Commission of Korea		CC
Policy makers	State Agencies	Korea International Cooperation Agency		CC
Policy makers	Ministries	Ministry of Foreign Affairs (MOFA Korea)	MOFA http://www.mofa.go.kr/ENG/main/index.jsp	LitRev
Policy makers	Legislators	National Assembly, Republic of Korea	Member of Parliament (MP) Dr. Cho, Myung Chul	LitRev
Policy makers	Diplomats	Former Ambassador to China, former MP	Mr. Kwon, Young Se	LitRev
Policy makers	Government officials	Former Korean Ambassador to Belgium and the EU	Mr. Kim, Changbeom	LitRev
Policy makers	Government officials	European Affairs Bureau in Korean Ministry of Foreign Affairs (SKMOFA)	Director General: Mr. Park, Cheolmin;	LitRev
Policy makers	Government officials	European Affairs Bureau in Korean Ministry of Foreign Affairs (SKMOFA)	Officer in charge of EU and UK affairs: Ms. Seo, Min-jeong	LitRev
Policy makers	Government bodies in sectors	Energy and environment		CC

	important for EU – South Korea cooperation			
Civil society	NGOs (cultural)	KCCO (Korea Capital of Culture Organisation)	President Mr. Kim, Seok Eun	LitRev
Civil society	NGOs (development)	Human Asia	President Prof. Soh, Changrok	LitRev
Civil society	NGOs (development)	NDI (National Democratic Institute)	Senior programme manager in South Korea: Ms. Kay Seok	LitRev
Media	Press	Chonsun Daily	Chief editor of International Section: Mr. Seonwoo, Jeong	LitRev
Media	Press	Joong Ang Daily	Chief editor of International Section: Ms. Park, So Young	LitRev
Media	Press	Maeil Kyungje Shinmun	Chief editor of International Section: Mr. Kim, Woongcheol	LitRev
Media	Broadcasting Network	Munhwa Broadcasting Corporation (MBC)	Reporter: Mr. Kwon, Heejin	LitRev
General public	Korean-speakers			CC
General public	Cultural outreach	Online Film Festival		CC
Other	Art and culture	EUNIC Korea, Seoul	Dr. Stefan Dreyer Stefan.Dreyer@seoul.goethe.org	SC

USA

Table 31. US potential partners

Target Group – general	Target group – specific (types of institutions/ thematic areas)	Target group – specific – institutions	Target group – specific – individuals	Source
Academia	Academics in European affairs		Roger Kanet rkanet@miami.edu	LitRev
Academia	Academics in European affairs		Joseph Parents jparents@miami.edu	LitRev
Academia	Academics in European affairs	National Defense University	Leo G. Michel INSS@usafa.edu	LitRev
Academia	Academics in European affairs	RAND Corporation	Stephen Larrabee	LitRev

			media@rand.org , (310) 451-6913,	
Academia	Academics in European affairs		Daniel Hamilton dhamilton@jhu.edu Phone: 202.663.5880	LitRev
Think Tanks	Policy research institutions	American Enterprise Institute, AEI	Desmond Lachman dlachman@aei.org	LitRev
		Brookings - Center on the United States and Europe (policy research)	Fiona Hill communications@brookings.edu	LitRev
		Center for Strategic and International Studies (CSIS)	Heather Conley Heather A. Conley	LitRev
Think Tanks	Policy research institutions	Council on Foreign Relations (CFR)	Richard Haass, president@cfr.org	LitRev
Think Tanks	Policy research institutions	Carnegie Endowment for International Peace (CEIP)	Judy Dempsey, jdempsey@ceip.org	LitRev
Think Tanks	Policy research institutions	Atlantic Council of the US (ACUS)	Frances G. Burwell Press@atlanticcouncil.org	LitRev
Think Tanks	Policy research institutions	German Marshall Fund	Public Relations Manager Kelsey Glover, +1 202 683 2648; kglover@gmfus.org	LitRev
Think Tanks	Policy research institutions	PBS/ Frontline	Raney Aronson-Rath feedback@wgbh.org	LitRev
Think Tanks	Policy research institutions	Hudson	Hudson: Richard Weitz weitz@hudson.org	LitRev
Policy makers	Federal government and Legislative	Congress; Supreme Court		LitRev & CC
Policy makers	Government officials	US Government (Dep. Of State)	David Armitage armitage@american.edu	LitRev
Policy makers	Executive branch	White House; agencies; departments		
Policy makers	Government officials	Library of Congress	Kristin Archick, Specialist in European Affairs	LitRev

			karchick@crs.loc.gov	
Policy makers	States	States with own trade policies: Florida, Virginia, Iowa; Caucus of the governors of different US states		CC
Policy makers	Local and county governments	Especially municipalities and cities (such as sister-cities and major urban hubs)	Chicago, New York City	CC
Policy makers	Local and county governments	Municipalities	local schools (K-12 grades)	CC
Civil society	NGOs	Human Rights Watch		LitRev
Civil society	NGOs	Aspen Institute		LitRev
Civil society	NGOs	Climate Reality Project		LitRev
Civil society	NGOs	US NGOs working on development cooperation in third countries on similar issues as EU development cooperation initiatives	e.g. Carter Center (electoral observation)	CC
Media	Press	New York Times		LitRev
Media	Press	Wall Street Journal		LitRev
Media	Press	Foreign Policy magazine		LitRev
Media	Press (radio)		Diane Rehm drshow@wamu.org	LitRev
General public	Latino/ Hispanic community			CC
Other	Art and culture	EUNIC Chicago, EUNIC New York, EUNIC Washington DC	EUNIC cluster representative: Zoe Kosmidou zkosmidou@greekculture.us	SC
Other	Multilateral organisations	Organisation of American States (OAS)		CC

5 BASELINE INDICATORS

According to the ToR, the study should entail, among other components, ‘the use of some indicators that will allow comparability over time and across countries/ regions.’ The Final Report must include ‘an updatable database allowing extrapolating key findings such as similarities/ differences among the strategic countries and regions, target audiences, key themes and policy areas, and trends.’

In 2014 the EU created the Partnership Instrument aiming, among other things, to enhance ‘widespread understanding and visibility of the Union and of its role on the world scene by means of Public Diplomacy [...]’. Importantly, according to the Regulation, ‘the attainment of that objective may be measured, inter alia, by opinion surveys or evaluations’ (Regulation (EU) No 234/ 2014: 1(d)). The latter point was reiterated in the Partnership Instrument Indicative Programme for the Period 2014-2017, which stated that the EU is to engage in ‘Public Diplomacy and outreach activities to promote the Union’s values and interests’ and one of the expected outcomes is the ‘perception of the EU and its policies in countries targeted by actions under this instrument, as measured for example by opinion surveys and evaluations’ (European Commission 2014).

The study presented in this Final Report combined a number of methods and indicators to assess the perception of the EU and Europe as requested in the ToR. Given that we use a wealth of material collected over months of intense empirical work in 10 Strategic Partner countries that resulted in a variety of qualitative and quantitative findings, in this chapter we outline some key indicators that can be quantified and used as a measure of perception. Furthermore, the study also provides **baseline values** against which further changes in the perception of the EU/ Europe can be measured (see also e-folder of this report). In order to repeat such exercise **in the future** a new public opinion poll across the 10 SP countries would be needed, using some or all of the questions from the research at hand. It should be supplemented with the media analysis. A representative set of interviews could be carried out to help explaining findings, although it is not used in the current version of the baseline.

5.1 Methodology

The selected indicators draw on the findings of the public opinion survey and media analysis as these methods were the main source of quantitative data for this study. The focus is mostly on quantitative indicators in order to facilitate measurement, comparison and monitoring progress over time. Our approach builds on the analytical framework used for this study, in particular the key research criteria of visibility, effectiveness, local resonance and normative power as well as the thematic fields studied across the different methods applied in this study, including economy and trade; politics and security; development – including the social internal and international dimensions; social – including migration, multiculturalism and human rights; environmental protection; science, research and technology; culture and education.

The first group of indicators (1.1 – 1.5) concerns *general* perceptions of EU, whereas the perception in relation to specific themes is addressed by the second group of indicators (2.1-2.8).

5.2 General perceptions

In the baseline database, the general perception of the EU is subdivided into the following subsections: visibility; emotional connection; general associations with the EU; local resonance; and summary of key frames of EU news.

- The *visibility* section (1.1) includes indicators measuring how visible and seen the EU and its officials, Member States and its officials are in the media and among the public

Table 32. EU and Europe general perception – visibility indicators

	Brazil	Canada	China	India	Japan	Mexico	Russia	S. Africa	S. Korea	USA
Visibility										
EU visibility (PO, %)	Visible 93% Not 7%	Visible 87% Not 13%	Visible 95% Not 5%	Visible 93% Not 7%	Visible 76% Not 24%	Visible 97% Not 3%	Visible 93% Not 7%	Visible 85% Not 15%	Visible 92% Not 8%	Visible 88% Not 12%
EU visibility/ mo MA (MA-EU, #)	Popular 60 Business 71	Popular 83 Business 33	Popular 55 Business 51	Popular 32 Business 40	Popular 58 Business 134	Popular 62 Business 59	Popular 51 Business 68	Popular 18 Business 47	Popular 34 Business 46	Popular 78 Business 73
Europe visibility/ mo (MA-Europe, #)	Popular 29 Business 37	Popular 86 Business 60	Popular 132 Business 128	Popular 46 Business 58	Popular 80 Business 246	Popular 29 Business 67	Popular 67 Business 88	Popular 17 Business 33	Popular 97 Business 116	Popular 40 Business 41
EU degree of centrality (MA-EU, %)	Major 51% Minor 34%	Major 16% Minor 45%	Major 25% Minor 55%	Major 7% Minor 32%	Major 26% Minor 47%	Major 40% Minor 31%	Major 30% Minor 54%	Major 60% Minor 14%	Major 45% Minor 24%	Major 53% Minor 20%
Europe degree of centrality (MA-Europe, %)	Major 15% Minor 58%	Major 89% Minor 2%	Major 3% Minor 86%	Major 36% Minor 2%	Major 6% Minor 76%	Major 13% Minor 56%	Major 2% Minor 85%	Major 3% Minor 64%	Major 13% Minor 58%	Major 12% Minor 68%
Visibility of EU institutions/ symbols (PO)	Euro ECB EP	Euro ECB European Flag	Euro Council of the EU ECB	Euro European Flag ECB	Euro ECB European flag	Euro EP ECB	Euro EP ECB	Euro ECB European Flag	Euro ECB EP	Euro EP ECB
Visibility of MS vis-à-vis institutions (MA-EU)	Greece Germany ECB	Greece Germany ECB	Germany Greece UK	UK Greece Germany	Greece Germany ECB	Greece ECB Germany	Greece EC Germany	Greece Germany ECB	Greece ECB Germany	Greece Germany ECB
Visibility of EU vis-à-vis MS officials (MA-EU)	A. Tsipras A. Merkel D.Cameron	A. Tsipras A. Merkel Y. Varoufakis	J. Juncker A. Merkel A. Tsipras	D. Cameron A. Tsipras A. Merkel	A. Tsipras A. Merkel D.Cameron	A. Tsipras A. Merkel J. Juncker	A. Tsipras A. Merkel J. Juncker/ D. Cameron	A. Tsipras D.Cameron A. Merkel	A. Tsipras A. Merkel D.Cameron	A. Tsipras A. Merkel D. Cameron

Frequency of hearing about EU (PO, %)	Often 64% Never 11%	Often 32% Never 34%	Often 73% Never 6%	Often 31% Never 16%	Often 30% Never 39%	Often 60% Never 9%	Often 81% Never 10%	Often 54% Never 15%	Often 51% Never 15%	Often 32% Never 36%
Main media channels for hearing about EU (PO)	TV Online Social media	TV Online Print	Online TV Social media	TV Print Online	TV Online Print	TV Social media Online	TV Online Social media	TV Online Social media	TV Online Print	TV Online Print

- The *Emotional-connection* section (1.2) has indicators on the feelings and evaluations connected with the EU, both from the public and in the media
- *General associations with EU and Europe* (1.3) features indicators that measure what images and metaphors the EU and Europe are associated with, both among the public and in the media
- *Local resonance* (1.4) has indicators that look at which issues resonate most with the public, as well as the focus of domesticity of news on the EU – namely whether news items mentioning the EU are primarily focused on the EU level; Member State-level or local-level in terms of the stakeholders being impacted
- *The summary of key frames of EU and EUROPE news* (1.5) is an indicator that shows the top three most common frames for EU-related media reporting in a given country

Table 33. EU and Europe general perception – Emotional connection, General associations with the EU, Local resonance, Summary of key frames of EU news

Indicator	Brazil	Canada	China	India	Japan	Mexico	Russia	S. Africa	S. Korea	USA
<i>Emotional connection</i>										
General evaluation of EU (PO, %) in public opinion	Pos. 59% Neg. 7%	Pos. 38% Neg. 10%	Pos. 56% Neg. 5%	Pos. 63% Neg. 7%	Pos. 27% Neg. 7%	Pos. 63% Neg. 8%	Pos. 23% Neg. 38%	Pos. 53% Neg. 12%	Pos. 44% Neg. 10%	Pos. 39% Neg. 10%
General evaluation of EU in media (MA-EU, %)	Pos. 13% Neg. 23%	Pos. 11% Neg. 22%	Pos. 12% Neg. 22%	Pos. 14% Neg. 30%	Pos. 12% Neg. 5%	Pos. 29% Neg. 34%	Pos. 0% Neg. 4%	Pos. 6% Neg. 12%	Pos. 23% Neg. 38%	Pos. 32% Neg. 36%
General evaluation of Europe in media (MA-Europe, %)	Pos. 57% Neg. 13%	Pos. 4% Neg. 4%	Pos. 8% Neg. 4%	Pos. 15% Neg. 15%	Pos. 5% Neg. 9%	Pos. 21% Neg. 17%	Pos. 3% Neg. 3%	Pos. 6% Neg. 15%	Pos. 22% Neg. 9%	Pos. 16% Neg. 16%
Target country relationship w/ EU (PO, %)	Good 58% Bad 6%	Good 58% Bad 2%	Good 57% Bad 3%	Good 70% Bad 3%	Good 35% Bad 5%	Good 50% Bad 5%	Good 11% Bad 58%	Good 42% Bad 9%	Good 40% Bad 3%	Good 54% Bad 4%

General associations with EU										
Main conceptual metaphors in EU media framing (the EU is framed in terms of ...) (MA - EU)	<i>Politics:</i> war, game <i>Economy:</i> unstable structure <i>Social& Cultural:</i> negative emotions, house/ club/ door	<i>Politics:</i> bullying/ physical aggression, house/ club <i>Economy:</i> theatre, sickness <i>Social& Cultural:</i> flood	<i>Politics:</i> war, plant <i>Economy:</i> war, sickness <i>Social& Cultural:</i> flood/ wave	<i>Politics:</i> bull, emotions <i>Economy:</i> family, glamorous woman <i>Social& Cultural:</i> murder	<i>Politics:</i> game/ gamble <i>Economy:</i> travel <i>Social& Cultural:</i> space/ moving in space	<i>Politics:</i> unstable structure <i>Economy:</i> unstable structure, expanding material substance	<i>Politics:</i> body, hunting <i>Economy:</i> separation, taming animal <i>Social& Cultural:</i> dancing	<i>Politics:</i> war/ battle, magic <i>Economy:</i> disease/ health, war <i>Social& Cultural:</i> flood	<i>Politics:</i> material substance lacking wholeness <i>Economy:</i> club, war <i>Social& Cultural:</i> negative emotions	<i>Politics:</i> frustration, 'fortress Europe' <i>Economy:</i> economic terrorism, physical unwellness <i>Social& Cultural:</i> invasion
EU image (PO)	Strong Efficient Multicultural	Multicultural Modern United	Multicultural Modern Strong	Modern Strong Efficient	Multicultural Modern United	Multicultural Modern Strong	Hypocritical Multicultural Arrogant	Strong Modern Multicultural	Modern Peaceful Multicultural	Multicultural Modern Peaceful
Local resonance										
Local resonance on important themes (PO)	Liberty Democracy Respect for human dignity	Respect for human dignity Liberty Respect for human rights	Pluralism Respect for human dignity Equality between women and men	Respect for human dignity Liberty Respect for human rights	Democracy Liberty Respect for human rights	Liberty Solidarity Respect for human rights	Respect for human dignity Respect for human rights Liberty	Respect for human rights Respect for human dignity Democracy	Liberty Democracy Respect for human dignity	Respect for human rights Respect for human dignity Equality between women and men
Focus of domesticity in media coverage of EU (MA-EU,%)	MS 38% EU 17% Local 17%	MS 39% EU 29% Local 15%	Local 31% MS 25% EU 17%	Local 34% MS 32% EU 15%	MS26% EU 24% Local 22%	MS 35% Local 23% EU 18%	Local 38% EU 27% MS 13%	MS 35% EU 28% Local 11%	Local 37% MS 28% EU 15%	MS 36% EU 29% Local 8%
Local vs. international sources of EU news (MA-EU, %)	Popular: 73% local 27% intl Business: 44% local 56% intl	Popular: 55% local 45% intl Business: 60% local 40% intl	Popular: 93% local 7% intl Business: 98% local 2% intl	Popular: 46% local 54% intl Business: 59% local 41% intl	Popular: 100% local, 0% intl Business: 99% local 1% intl	Popular: 61% local 39% intl Business: 89% local 11% intl	Popular: 100% local 0% intl Business: 91% local 9% intl	Popular: 11% local, 89% intl Business: 33% local 67% intl	Popular: 95% local 5% intl Business: 99% local 1% intl	Popular: 81% local 19% intl Business: 71% local 29% intl
Summary of key frames of EU news										

Summary of key frames and sub-frames of EU (MA-EU)	<i>Economy:</i> State of economy <i>Politics</i> Internal: Brexit External: EU Russia sanctions/ relations with Russia <i>Social and culture</i> Migration	<i>Economy:</i> State of economy <i>Politics</i> Internal: Grexit External: Ukraine and EU Russia sanctions <i>Social and culture</i> Migration	<i>Economy:</i> State of economy <i>Politics</i> Internal: Brexit External: EU-Russia relations <i>Social and culture:</i> Migration	<i>Economy:</i> State of economy <i>Politics</i> Internal: Brexit External: Iran nuclear deal <i>Social and culture:</i> Migration	<i>Politics</i> Internal: Grexit External: Ukraine and EU Russia sanctions <i>Economy:</i> State of economy <i>Normative:</i> Environment	<i>Politics</i> Internal: Grexit External: EU- Mexico relations <i>Economy:</i> State of economy <i>Social and culture:</i> Migration	<i>Economy:</i> Trade <i>Politics</i> Internal: Brexit External: EU-Russia relations <i>Energy:</i> Security of supply	<i>Economy:</i> Trade <i>Politics</i> Internal: Brexit External: EU-Russia relations <i>Social and culture:</i> Migration	<i>Economy:</i> State of economy <i>Politics</i> Internal: Brexit External: Ukraine and EU Russia sanctions <i>Social and culture:</i> Migration	<i>Politics</i> Internal: Brexit External: US foreign and domestic politics <i>Economy:</i> State of economy <i>Social and culture:</i> Migration
Summary of key frames and sub-frames Europe news (MA-Europe)	<i>Economy:</i> State of economy <i>Social and culture:</i> Migration <i>Politics</i> Internal: Brexit External: EU Russia sanctions	<i>Economy:</i> Business and finance <i>Social and culture:</i> Lifestyle <i>Politics</i> Internal: Terrorist groups External: recruitment Ukraine and EU Russia sanctions	<i>Economy:</i> Business and finance <i>Social and culture:</i> Lifestyle <i>Politics</i> Internal: Brexit External: History – WWII	<i>Economy:</i> Industry <i>Social and culture:</i> History <i>Politics</i> Internal: Integration External: Europe-India relations	<i>Economy:</i> Industry <i>Social and culture:</i> Sports <i>Politics</i> Internal: History – WWII External: AIIB	<i>Economy:</i> Business and finance <i>Social and culture:</i> Migration <i>Politics</i> Internal: Grexit External: Europe-Mexico relations	<i>Social and culture:</i> History <i>Economy:</i> Business and finance <i>Politics</i> Internal: European military capacity External: EU-Russia relations	<i>Economy:</i> Business and finance <i>Social and culture:</i> History <i>Politics</i> Internal: European military capacity External: EU-Russia relations	<i>Economy:</i> Business and finance <i>Social and culture:</i> Migration <i>Politics</i> Internal: History - France External: South Korea – Russia relations	<i>Politics</i> Internal: Brexit External: US foreign and domestic politics <i>Economy:</i> Business and finance <i>Social and culture:</i> Migration

A full list of indicators used in the general perceptions section is below.

Visibility

- EU visibility - to what extent the population is aware of the EU based on frequency of hearing about the EU in different media sources
- EU visibility in media - the extent to which the EU is covered in target country per month
- Europe visibility in media - the extent to which Europe is covered in target country per month
- EU degree of centrality - the percentage of articles on EU where it is a central major actor in the story

- Europe degree of centrality - the percentage of articles on Europe where it is a central to the story
- Visibility of EU institutions -the top three most visible EU institutions and symbols
- Visibility of MS vis-à-vis institutions - most covered Member States and institutions in EU articles
- Visibility of EU vis-à-vis MS officials - most covered EU and MS officials
- Frequency of hearing about the EU - how often general public hears about the EU
- Main media channels for hearing about EU - the main channels through which general public hears about the EU

Emotional connection

- General evaluation of the EU - how positive versus negative the population feels about the EU
- General evaluation of the EU in media - how EU actions are evaluated in the media in general
- General evaluation of Europe in media – how Europe actions are evaluated in the media in general
- Target country relationship with the EU – the view of how good versus how bad target country's relationship with the EU is perceived

General associations with the EU

- main conceptual metaphors in media EU perceptions - the conceptual metaphors most often used by the media in reference to EU (as concerns specific frames of economy, politics and social)
- EU image - descriptive words general population chooses to describe the EU

Local resonance

- Local resonance on important normative themes - in the public's perception - on which issues their views are most similar to the EU's
- Focus of domesticity in media coverage of EU - the extent to which in media coverage of EU, the focus of domesticity is on EU, vs EU MS vs Local
- Local vs. international sources of EU news – the extent to which media coverage of EU relies on international vs. local sources

The summary of key frames of EU news

- Main topics on EU media articles - in news concerning the EU - which topics dominate in the media?
- Main topics on EUROPE media articles - in news concerning the EU - which topics dominate in the media?

5.3 Theme-specific perceptions

The section on theme-specific perceptions (2), on the other hand, looks specifically at how the public perceives the EU's performance (effectiveness) and role (actorness) within the block and in the global arena, as concerns the specific themes being analysed in this study.

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

Below follows a list of indicators used to measure perceptions under the listed themes:

Economy and trade

Economy

- Media evaluation of EU economy - how EU is evaluated in the media on the topic of Economy
- EU effectiveness in creating employment opportunities - EU performance in creating employment opportunities
- EU effectiveness in reducing income inequality - EU performance in reducing income inequality
- EU actorness in global economic affairs - how influential the EU is seen in global economic affairs

Trade

- EU effectiveness in global trade - how well the EU performs in global trade
- Importance of EU as trading partner - the extent to which the EU is perceived as being an important trade partner for the target country

Table 34. EU and Europe theme-specific perception – Economy and trade

Indicator	Brazil	Canada	China	India	Japan	Mexico	Russia	S. Africa	S. Korea	USA
<i>Economy</i>										
Media evaluation of EU economy (%)	Pos. 14% Neg. 24%	Pos. 14% Neg. 19%	Pos. 14% Neg. 27%	Pos. 16% Neg. 38%	Pos. 7% Neg. 8%	Pos. 20% Neg. 37%	Pos. 0% Neg. 3%	Pos. 9% Neg. 13%	Pos. 17% Neg. 45%	Pos. 33% Neg. 40%
EU effectiveness in creating empl. opportunities (%)	Good 60% Bad 8%	Good 34% Bad 11%	Good 64% Bad 6%	Good 78% Bad 5%	Good 28% Bad 10%	Good 61% Bad 8%	Good 33% Bad 22%	Good 58% Bad 9%	Good 36% Bad 11%	Good 39% Bad 9%

EU effectiveness in reducing income inequality (%)	Good 58% Bad 9%	Good 28% Bad 13%	Good 59% Bad 5%	Good 67% Bad 11%	Good 23% Bad 14%	Good 55% Bad 8%	Good 27% Bad 27%	Good 43% Bad 13%	Good 34% Bad 14%	Good 35% Bad 11%
EU actorness in global economic affairs (influential / not influential, %)	Infl. 84% Not 10%	Inf. 68% Not 13%	Infl. 85% Not 12%	Infl. 72% Not 20%	Infl. 65% Not 15%	Infl. 84% Not 12%	Infl. 76% Not 18%	Infl. 79% Not 12%	Infl. 82% Not 14%	Infl. 63% Not 15%
Trade										
EU effectiveness in global trade (%)	Good 76% Bad 3%	Good 56% Bad 4%	Good 79% Bad 2%	Good 79% Bad 3%	Good 46% Bad 4%	Good 80% Bad 2%	Good 67% Bad 10%	Good 73% Bad 3%	Good 50% Bad 7%	Good 51% Bad 5%
Importance of EU as trading partner (important/unimportant, %)	Imp. 58% Not 8%	Imp. 58% Not 4%	Imp. 85% Not 1%	Imp. 83% Not 4%	Imp. 50% Not 3%	Imp. 66% Not 6%	Imp. 55% Not 14%	Imp. 64% Not 6%	Imp. 63% Not 6%	Imp. 61% Not 3%

Politics and security

Politics

- Media evaluation of EU in politics - how EU is evaluated in the media on the topic of politics
- Likelihood of EU leadership in global affairs - how likely the public finds EU leadership in global affairs
- Desirability of EU global leadership - how desirable the public finds EU leadership in global affairs

Security

- EU effectiveness in fight against terrorism - how well the EU performs in the global fight against terrorism
- EU effectiveness in military operations - how well EU performs in military operations
- EU effectiveness in peacekeeping operations - how well EU performs in peacekeeping operations
- EU actorness in global peace and security - importance of EU in maintaining global peace and stability

Table 35. EU and Europe theme-specific perception –Politics and security

Indicator (%)	Brazil	Canada	China	India	Japan	Mexico	Russia	S. Africa	S. Korea	USA
Politics										
Media evaluation of EU in politics	Pos. 11% Neg. 9%	Pos. 6% Neg. 19%	Pos. 12% Neg. 15%	Pos. 6% Neg. 23%	Pos. 6% Neg. 6%	Pos. 28% Neg. 36%	Pos. 0% Neg. 7%	Pos. 0% Neg. 7%	Pos. 18% Neg. 47%	Pos. 29% Neg. 37%

Likelihood of EU leadership in global affairs	Likely 65% Not 8%	Likely 53% Not 8%	Likely 68% Not 3%	Likely 69% Not 4%	Likely 39% Not 11%	Likely 73% Not 6%	Likely 53% Not 21%	Likely 66% Not 7%	Likely 54% Not 7%	Likely 50% Not 8%
Desirability of EU global leadership	Des. 56% Not 13%	Des. 59% Not 6%	Des. 56% Not 5%	Des. 67% Not 4%	Des. 37% Not 10%	Des. 66% Not 9%	Des. 31% Not 37%	Des. 68% Not 9%	Des. 49% Not 8%	Des. 53% Not 7%
Security										
EU effectiveness in fight against terrorism	Good 62% Bad 8%	Good 43% Bad 11%	Good 59% Bad 7%	Good 69% Bad 7%	Good 35% Bad 9%	Good 63% Bad 9%	Good 31% Bad 32%	Good 54% Bad 11%	Good 35% Bad 13%	Good 40% Bad 13%
EU effectiveness in military operations	Good 56% Bad 6%	Good 37% Bad 8%	Good 54% Bad 6%	Good 77% Bad 5%	Good 33% Bad 6%	Good 55% Bad 7%	Good 17% Bad 39%	Good 54% Bad 9%	Good 30% Bad 11%	Good 39% Bad 11%
EU effectiveness in peacekeeping operations	Good 60% Bad 8%	Good 48% Bad 7%	Good 63% Bad 5%	Good 73% Bad 5%	Good 39% Bad 5%	Good 68% Bad 7%	Good 21% Bad 38%	Good 58% Bad 8%	Good 49% Bad 6%	Good 43% Bad 8%
EU actorness in global peace and security	Imp. 78% Not 15%	Imp. 71% Not 10%	Imp. 85% Not 13%	Imp. 72% Not 23%	Imp. 66% Not 15%	Imp. 81% Not 15%	Imp. 53% Not 40%	Imp. 80% Not 13%	Imp. 79% Not 15%	Imp. 67% Not 14%

Development (social internal and international)

- EU effectiveness in development cooperation - EU performance in development cooperation
- EU actorness in development cooperation- importance of EU role in support to developing countries to eradicate poverty, build a fairer and more stable world

Table 36. EU and Europe theme-specific perception – Development (social internal and international)

Indicator (%)	Brazil	Canada	China	India	Japan	Mexico	Russia	S. Africa	S. Korea	USA
EU effectiveness in development cooperation	Good 59% Bad 6%	Good 45% Bad 6%	Good 84% Bad 1%	Good 84% Bad 1%	Good 40% Bad 5%	Good 65% Bad 5%	Good 30% Bad 28%	Good 57% Bad 5%	Good 46% Bad 8%	Good 44% Bad 6%
EU actorness in development cooperation	Imp. 73% Not 19%	Imp. 67% Not 11%	Imp. 71% Not 24%	Imp. 71% Not 24%	Imp. 61% Not 17%	Imp. 75% Not 20%	Imp. 43% Not 42%	Imp. 78% Not 13%	Imp. 77% Not 15%	Imp. 60% Not 18%

Social (migration, multiculturalism and human rights, including gender equality)

- Media evaluation of EU in social - how EU is evaluated in the media in the area of social issues (incl. migration, human rights and multiculturalism)
- EU effectiveness in dealing with refugees, displaced people - how well EU performs in dealing with refugees, displaced people
- EU effectiveness in protection of minorities - how well EU performs in protection of minorities
- EU actorness in human rights - how important the EU is in promoting and defending human rights worldwide
- EU effectiveness in promoting equality between men and women - EU performance in equality between men and women

Table 37. EU and Europe theme-specific perception – Social (Migration, multiculturalism and human rights, including gender equality)

Indicator (%)	Brazil	Canada	China	India	Japan	Mexico	Russia	S. Africa	S. Korea	USA
Media evaluation of EU in social	Pos. 5% Neg. 50%	Pos. 9% Neg. 37%	Pos. 4% Neg. 35%	Pos. 19% Neg. 22%	Pos. 26% Neg. 13%	Pos. 56% Neg. 26%	Pos. 2% Neg. 10%	Pos. 6% Neg. 14%	Pos. 30% Neg. 30%	Pos. 36% Neg. 34%
EU effectiveness in dealing with refugees, displaced people	Good 44% Bad 20%	Good 30% Bad 16%	Good 52% Bad 9%	Good 64% Bad 8%	Good 34% Bad 8%	Good 54% Bad 13%	Good 21% Bad 43%	Good 46% Bad 15%	Good 23% Bad 18%	Good 33% Bad 13%
EU effectiveness in protection of minorities	Good 52% Bad 12%	Good 32% Bad 13%	Good 58% Bad 5%	Good 67% Bad 10%	Good 23% Bad 10%	Good 51% Bad 9%	Good 48% Bad 14%	Good 49% Bad 12%	Good 38% Bad 12%	Good 35% Bad 10%
EU actorness in human rights (important/unimportant)	Imp. 75% Not 17%	Imp. 71% Not 10%	Imp. 86% Not 12%	Imp. 72% Not 22%	Imp. 60% Not 16%	Imp. 78% Not 17%	Imp. 50% Not 37%	Imp. 79% Not 11%	Imp. 77% Not 15%	Imp. 65% Not 15%
EU effectiveness in promoting equality between men and women	Good 65% Bad 5%	Good 46% Bad 10%	Good 75% Bad 2%	Good 71% Bad 7%	Good 47% Bad 4%	Good 72% Bad 4%	Good 56% Bad 10%	Good 62% Bad 8%	Good 55% Bad 6%	Good 45% Bad 8%

Environment

- EU effectiveness in environmental protection - how well EU performs in environmental protection and fight against climate change and protection of the environment
- EU actorness in environment and energy – importance of EU role in fighting climate change and protecting the environment

Table 38. EU and Europe theme-specific perception – Environment

Indicator (%)	Brazil	Canada	China	India	Japan	Mexico	Russia	S. Africa	S. Korea	USA
EU effectiveness in environmental protection	Good 54% Bad 10%	Good 41% Bad 8%	Good 71% Bad 3%	Good 77% Bad 4%	Good 39% Bad 5%	Good 66% Bad 6%	Good 36% Bad 17%	Good 58% Bad 8%	Good 45% Bad 7%	Good 39% Bad 7%
EU actorness in environment and energy	Imp. 73% Not 19%	Imp. 67% Not 11%	Imp. 86% Not 11%	Imp. 71% Not 23%	Imp. 61% Not 17%	Imp. 78% Not 17%	Imp. 55% Not 30%	Imp. 77% Not 13%	Imp. 77% Not 15%	Imp. 62% Not 16%

Science, research and technology

- EU effectiveness in science, research and technology - how well EU performs in science and research
- EU actorness in science, research and technology - importance of EU role in advancing global innovation/ technological progress

Table 39. EU and Europe theme-specific perception – Science, research and technology

Indicator (%)	Brazil	Canada	China	India	Japan	Mexico	Russia	S. Africa	S. Korea	USA
EU effectiveness in science, research and technology	Good 77% Bad 3%	Good 51% Bad 4%	Good 78% Bad 2%	Good 81% Bad 3%	Good 41% Bad 5%	Good 79% Bad 2%	Good 69% Bad 5%	Good 69% Bad 3%	Good 49% Bad 6%	Good 48% Bad 6%
EU actorness in science, research and technology	Imp. 81% Not 13%	Imp. 65% Not 17%	Imp. 88% Not 10%	Imp. 77% Not 19%	Imp. 62% Not 16%	Imp. 82% Not 14%	Imp. 65% Not 26%	Imp. 74% Not 18%	Imp. 77% Not 16%	Imp. 62% Not 19%

Culture

- Attractiveness of EU countries' culture and lifestyle - to what extent EU Member States are seen as attractive for their culture and lifestyle
- Europe actorness in arts - to what extent Europe's arts and music are seen as important

Table 40. EU and Europe theme-specific perception – Culture

Indicator (%)	Brazil	Canada	China	India	Japan	Mexico	Russia	S. Africa	S. Korea	USA
Attractiveness of EU countries' culture and lifestyle (attractive/unattractive)	Attr. 83% Not 14%	Attr. 73% Not 13%	Attr. 83% Not 16%	Attr. 73% Not 23%	Attr. 61% Not 20%	Attr. 88% Not 9%	Attr. 77% Not 17%	Attr. 78% Not 16%	Attr. 74% Not 18%	Attr. 67% Not 16%
Europe actorness in arts	Imp. 34% Not 28%	Imp. 46% Not 10%	Imp. 73% Not 3%	Imp. 77% Not 11%	Imp. 53% Not 5%	Imp. 44% Not 17%	Imp. 56% Not 13%	Imp. 53% Not 12%	Imp. 45% Not 13%	Imp. 52% Not 7%

Education

- EU effectiveness in education - how well EU performs in the level of education of its public
- EU actorness in education - how strongly the general public agrees or disagrees that the EU is an important partner for target country's education exchanges.

Table 41. EU and Europe theme-specific perception – Education

	Brazil	Canada	China	India	Japan	Mexico	Russia	S. Africa	S. Korea	USA
EU effectiveness in education	Good 77% Bad 3%	Good 56% Bad 3%	Good 82% Bad 2%	Good 87% Bad 1%	Good 47% Bad 4%	Good 81% Bad 2%	Good 57% Bad 13%	Good 70% Bad 5%	Good 54% Bad 5%	Good 52% Bad 4%
EU actorness in education	Imp. 73% Not 5%	Imp. 54% Not 6%	Imp. 80% Not 2%	Imp. 82% Not 4%	Imp. 46% Not 5%	Imp. 70% Not 6%	Imp. 54% Not 20%	Imp. 61% Not 7%	Imp. 59% Not 6%	Imp. 51% Not 6%

5.4 Baseline databases per Strategic Partner country

Baseline database for each of the 10 Strategic Partner countries analysed in the study can be found in e-folder of the report. The databases are all in Excel format, and each include:

- The indicators themselves as listed in this section
- The description of each of the indicators, explaining what they measure
- The source – which of the methods used in the study was used to measure the given indicator, listing the specific question (public opinion poll) or measurement category (media analysis) used
- Measurement – explanation on how the indicator was measured and whether it is a categorical indicator, numerical or percentage
- The value – as measured in the answers to the public opinion poll and media analysis
- Answer options – where applicable – the answer options available to respondents (public opinion poll) and media experts (media analysis)
- Notes – any additional notes on how the measurement was made, when additional explanations are needed.

The databases, complete with the information provided within them, serve as updatable documents that can be used to measure change in perceptions. They can be either replicated by using the same indicators and recalculating the values based on future studies, or revised using the same logic, based on the need of the specific study concerned.

6 SUMMARY OF FINDINGS AND POLICY RECOMMENDATIONS

6.1 Summary findings

The summary of findings shows that there are EU and Europe themes such as economy and the EU as a political actor that are perceived globally; nuances appear on a national level, while regional trends have not surfaced. In line with a globalising world, rather EU-internal news such as the migration and Greek debt crises are reported widely – independently of their internal character or their distance to the respective country. Local conditions affect perceptions significantly, showing that while there is a request for a set of consistent EU core messages, the implementation of EU Public Diplomacy activities will have to be decentralised and tailor-made to local conditions on-site of the EU Strategic Partner country.

This section summarises the main findings identified in the aggregated analysis and the country chapters. The aggregated analysis revealed comprehensive findings across countries and building blocks of this study while country specific findings are drawn from the country chapters and country-specific reports.

6.1.1 Comprehensive findings and global trends

The aggregated analysis confirms the already previously visible trend that economy is the most addressed theme in perceptions of the EU and Europe from abroad, followed by (internal) political issues, across all building blocks of the study – other than social media which highlights political issues first and economy second. History (historical ties/ encounters) and cultural and normative kinship (commonalities/ dissimilarities) are particularly influential as local conditions in shaping perceptions in the EU's Strategic Partner countries.

Themes

The EU is most visible and considered very active and effective in the area of **economy**, even though the Eurozone and the Greek debt crises have cast doubts on the EU's ability to resolve its internal economic problems. These financial crises, together with the migration crisis, and the uncertainties surrounding Brexit and Grexit, are also very visible in their **political** dimension. As far as the EU's internal politics are concerned, the EU is presented and seen as an effective actor, although the migration crisis and Grexit/ Brexit have damaged the image here as well. Aside from peace-keeping operations which are considered effective, the EU's external actorness in **security**-related fields draws only marginal attention. Media widely ignore the EU's involvement in international **development** while the public regard the EU's activities as fairly successful. Across all countries, the EU is considered an effective actor in social justice and providing a high quality of life, although the migration crisis has challenged this assessment. The visibility of the EU's **migration** policies has exponentially grown in the course of the migration crisis, simultaneously leading to increasingly negative assessments of the EU's **human rights** performance. The EU as well as Europe are considered as active and effective in protecting the environment, elites even consider the EU a norm setter in this area. On the other hand, the areas of **education** as well as **research, science and technology** the EU's activities are widely invisible in the media, while the public evaluate the EU as an effective, important, though partially contested actor in these fields. **Culture** is a

visible and appreciated topic, yet rather linked to Europe and EU Member States than to the EU.

Social media

The social media analysis featured in this study focussed on three major events: **Europe Day**, the **G7 Summit** and the **EU Summit**. Europe Day tweets predominantly served light entertainment purposes, only a small minority referred to substantial topics. For the G7 Summit, the analysis of Twitter content revealed that **politics** and **sociocultural** were the main thematic frames used in tweets. Overall, the EU was however not very **visible** or well profiled in terms of the volume or depth of communication in the context of G7. Relating to the EU Summit, the main topic of the tweets collected was the Greek crisis, reflecting the topicality of the issue, the widespread media coverage, its EU-relevance and its position on the agenda of the summit. Hence, both EU officials and other EU authors communicated the EU predominantly as a **political** entity and, to a lesser degree, as an **economic** and then a **sociocultural** actor. In both cases used for in-depth analysis – G7 and EU Summit – the most visible images of the EU as a political actor carried pronounced **normative** features associating the EU with the norms of human rights, good governance and sustainable development.

Explaining perceptions

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

As concerns **age**, younger respondents hold somewhat more positive views on the EU in Canada, India, US, South Africa, while older people tend to be more positive about the EU in Brazil, China, Japan, Mexico, Russia and South Korea. Regarding **gender**, women tend to be less aware about and/ or have more negative views of the EU in most SP countries with the exceptions of Russia (somewhat more positive views) and China (gender has no influence on views). **Contact with Europe** (living, visiting or having relatives in Europe) clearly supports more positive views on the EU; in the same vein, people who felt sufficiently informed about the EU tended to have more positive attitudes. When it comes to **income** and **working status**, more positive views were more likely to come from respondents in high income brackets as well as employed persons. Meanwhile, the **level of education** rarely had an effect, except for in Canada, where more educated people were more likely to have positive views, and Russia, where a more positive attitude was more often associated with students and people with a lower level of education. On some specific questions, **regional differences** were noticed inside countries; specifically, slightly more positive views were somewhat more likely in Canada's British Columbia; India's Bangalore; Northeast and West of the US; Southern/ North Caucasian Federal District of Russia. In Japan, responses from the Hokkaido region tended to be more negative on some questions.

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

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

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

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

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

Finally, **economic interdependence** is seen as desirable by some, for example to lessen US economic influence (e.g. Canada), or in the context FTA negotiations (e.g. South Korea), while others see EU's influence as risky and self-interested, and caution against too much economic dependency (e.g. South Africa). Russian media and interviewees notice the EU dependence

on Russian oil and gas supplies, while at the same time admitting that Russia also depends on its exports to the EU.

6.1.2 Country-specific findings

The following part summarises the findings from the individual country chapters on a country-by-country basis. The country chapters draw on all building blocks of the study.

Brazil

In Brazil awareness of the EU compared to a list of preselected countries and organisations provided in the survey is below most of the countries, above only India and Russia, however the EU is better known than most international organisations, with the exception of the UN and Mercosur. EU visibility in terms of how frequently people hear about it is rather high – only 11 per cent never hear about it or cannot provide an opinion, while over 65 per cent hear about it at least once a week or more often. The main sources for getting information on the EU are TV channels, online media (including online versions of print media) and social media. The three most visible themes in EU news in print media used for analysis are economy, politics and social and culture, while in Europe news cultural issues are mentioned more often than politics.

The EU was among the most positively viewed countries and international organizations in Brazil. Respondents find the EU among the top 3 most influential, important or attractive international actors in most thematic areas except Research, Science and Technology (RS&T). Most common descriptors for the EU among the respondents in Brazil were ‘strong’, ‘efficient’ and ‘multicultural.’ Overall, most EU articles in Brazil newspapers were neutral; however, almost twice as many of the remaining articles were negatively rather than positively framed. In contrast, in more than half of the articles, Europe was evaluated positively. Overall, media did not cover any EU policies or programmes in Brazil and in general seem to refrain from presenting a ‘local hook’. Contrastingly, EU’s interaction with the geopolitical region drew media attention.

The Brazilian public finds EU leadership in global affairs slightly less desirable than that of Japan or Brazil but above the rest of the countries used for comparison. Moreover, Brazilians also consider the US more likely to assume global leadership than the EU, which they rank as the second most likely actor to take on such a role. Looking specifically at EU’s effectiveness within different fields, comparing different sub-fields of culture, the EU is most positively regarded for its monuments and museums, and least positively for the theatre and cinema, as well as multiculturalism and music. In different areas of social development and education, the EU is seen best for education and quality of life and relatively least so for protection of minorities and integration of migrants and refugees. In economy and RS&T, the EU is best regarded for tourism and least so for agriculture. As regards politics and security, respondents in Brazil were most positive about EU’s performance in protection of environment and the rule of law, and least positive about its efforts in dealing with refugees.

Canada

In Canada awareness of the EU compared to a list of preselected countries and organisations provided in the survey was below that of the countries, but above other listed international organizations, with the exception of the UN. EU visibility in terms of how frequently people hear about it is rather low – as many as 68 per cent either could not provide an opinion,

never hear about it at all or do so once a month or less. The top 3 sources for getting information on the EU are TV channels, online media (including online versions of print media) and print media. Most visible themes of EU news in print media used for analysis are economy, politics and social and culture, whereas in Europe news social and cultural issues were mentioned more often than politics.

The EU was among the most positively viewed countries and international organizations in Canada. Respondents find the EU among the top 3 most influential, important or attractive international actors in most thematic areas except Research, Science and Technology (RS&T). Most common descriptors for the EU among the respondents in Canada were 'multilateral, 'strong' and 'united.' Overall, most of the articles in Canadian newspapers framed the EU neutrally, however, twice as many of the remaining articles contained a negative rather than a positive assessment. In contrast, more than half of the articles framed Europe positively. Overall, media tend to portray cyclical (e.g. UK election) or outstanding events (Greek debt crisis, Grexit and Brexit). Internal EU matters are seemingly not of much interest. Furthermore, media reporting mirrors regional and cultural differences: in the Quebec newspaper, European and francophone influence prevails, while in the English-speaking papers, interest in Anglo-Saxon activities is bigger.

The Canadian public ranks EU leadership in global affairs as more desirable than that of any other country used for comparison. However, Canadians find the US and China as more likely to assume global leadership in the future than the EU, making it the third most likely actor to take on such a role. Looking specifically at EU's effectiveness within different fields, comparing different sub-fields of culture, the EU is most positively regarded for its monuments and museums, as well as history, and least positively for the theatre and cinema, as well as multiculturalism and sports. In different areas of social development and education, the EU is seen best for education and quality of life and relatively least so for integration of migrants, reduction of income inequalities, and eradication of poverty. In economy and RS&T, the EU is best regarded for tourism and least so for space exploration technologies. As regards politics and security, respondents in Canada were most positive about EU's performance in the area of media freedom, the rule of law and peacekeeping operations, and least positive about its efforts in dealing with refugees.

China

In China awareness of the EU compared to a list of preselected countries provided in the survey is below most of the countries, above only Brazil, but above most other international organisations, with the exception of the UN and the WTO. EU visibility in terms of how frequently people hear about it is rather high – as many as 73 per cent of respondents reported that they hear about it almost every day or at least once a week. Main sources for getting information on the EU are online media (including online versions of print media), TV channels and social media. Most visible themes of EU news in print media used for analysis are economy, politics and social and culture, whereas in Europe news social and cultural issues are mentioned more often than politics.

The EU was among the most positively viewed countries and international organisations in China. Respondents find the EU as somewhat influential across different thematic areas, and it appears among the top 3 most influential, important or attractive international actors only in the areas of advancing worldwide Research, Science and Technology (RS&T) and

upholding an attractive lifestyle. Most common descriptors for the EU used by China respondents were 'multilateral,' 'modern' and 'strong.' Overall, most of the articles in Chinese newspapers framed the EU neutrally, however almost twice as many of the remaining articles contained a negative rather than a positive assessment. Europe was also mostly framed neutrally, but in contrast to the EU, twice as many of the remaining articles framed it positively rather than negatively. Overall, the EU is rather visible in Chinese media, especially when the stories have a local hook (e.g. the 17th China-EU Summit attended by Li Keqiang; Mogherini's visit to Beijing and the 40th anniversary of China-EU relation).

The Chinese public ranks EU leadership in global affairs as desirable, in this respect it is outranked by only China itself, and comparable to Russia. Moreover, the Chinese consider the US and China more likely to assume global leadership than the EU and Russia, making the latter two the third most likely actors to take on such a role. Looking specifically at EU's effectiveness within different fields, comparing different sub-fields of culture, the EU is most positively regarded in terms of luxury goods and clothes, and least positively for the theatre and cinema, as well as sports and cuisine. In social development and education, the EU is seen best for education and quality of life and relatively least so for integration of migrants. In economy and RS&T, the EU is best regarded for tourism, global trade and high quality food industry, and least so for entertainment industry, media and publishing. As regards politics and security, respondents in China were most positive about EU's performance in terms of fighting terrorism, maintaining the rule of law and supporting regional or international cooperation, and least positive about its efforts in dealing with refugees.

India

In India awareness of the EU compared to a list of preselected countries and organisations provided in the survey was below that of the countries, but above other listed international organizations, with the exception of the World Bank. EU visibility in terms of how frequently people hear about it is somewhat high, as many as 54 per cent of respondents hear about once a week or more often, with 9 per cent saying they never hear about it. The main sources for getting info on the EU are TV, print media and online media (including online versions of print media). Most visible themes in EU news in print media used for analysis are economy, politics and social and cultural affairs, while in Europe coverage social and cultural issues were mentioned more often than politics.

The EU was the most positively viewed global actor when comparing to other international organizations, but less so when compared to countries – it was outranked in this respect by the US, India itself, Russia and Japan. India respondents find the EU to be a somewhat influential, important or attractive international actor in most thematic areas, it was among the top 4 global actors in all except the themes of global economic affairs, environmental protection, and development cooperation, in all of which it is ranked among the top 5 international actors. Most common descriptors for the EU among India respondents were 'modern,' 'strong' and 'efficient'. As concerns evaluations of the EU in the media, it was largely neutral, and there was a similar proportion of negatively and positively framed coverage in the remainder of the articles. Positive framing in political news was in association to the manner in which EU was able to put together a framework for the Iranian nuclear agreement; renewed EU trade with Havana; and the news on the upcoming EU-India summit which was reported with enthusiasm, whereas negative political coverage emanated largely from the prospect of Brexit, protest against ECB measures and EU-Russia relations,

while in economic news negative coverage concerned the Greek debt crisis, EU-India FTA talks and anti-trust cases initiated by the EU.

As concerns desirability and likelihood of EU global leadership, comparing to how India respondents view preselected countries in this respect, the EU appears as both a desirable and likely leader – in terms of desirability it's behind only India itself and in terms of likelihood the EU is behind India, the US and Japan, and ranks similarly to Russia. Looking specifically at EU's effectiveness within different fields, comparing different sub-fields of culture, the EU is best regarded for music and sports as well as luxury goods and clothes, and relatively least so for the theatre and cinema as well as food and cuisine. In different areas of social development and education, the EU was seen most positively for education and quality of life and least positively for how it fares in ensuring social justice and solidarity, reducing income inequalities and protecting minorities. In Economy and Research, Science and Technology (RS&T), India respondents see the EU as performing best in development of new technologies and relatively less well in agriculture, the entertainment industry as well as media and publishing. In the area of politics and security, the EU is seen as performing best in supporting regional and international cooperation and relatively least so in dealing with refugees and displaced people.

Japan

In Japan awareness of the EU compared to a list of preselected countries and organisations provided in the survey was below that of the countries, but above all other listed international organizations. EU visibility in terms of how frequently people hear or read about the EU is rather low – beside as many as 24 per cent that could not provide an answer, the second highest share of Japanese respondents – 22 per cent said hear of the EU about once a week. A sizeable portion of the population, as many as 15 per cent, said they never hear or read about the EU. The main sources for getting info on the EU are TV channels, online media (including online versions of print media) and print media. Most visible themes in EU news in print media used for analysis are politics, economy and social and cultural, whereas in Europe coverage social and cultural issues are mentioned more often than politics.

The EU was among the most positively viewed countries and international organisations in Japan. Japanese respondents find the EU among the top 3 most influential, important or attractive international actors in most areas except development cooperation. Most common descriptors for the EU among Japan respondents were 'multicultural', 'modern' and 'united'. However, as regards representations of the EU in the media, Japan newspapers evaluated it more positively than negatively, while coverage of Europe was relatively neutral. The frames that had a substantial volume of articles ('politics' and 'economy'; dominant sub-frames: respectively Grexit/ Ukraine and EU Russia sanctions; the state of the economy) were predominantly neutral. The social and cultural frame manifested a somewhat polarised tone of both positive and negative reporting. The 'development', 'environment', 'normative' (dominant sub-frame: environment issues) and 'energy' frames all had over half of their news stories written positively.

As concerns desirability and likelihood of EU global leadership, the Japan public ranks the EU behind the US and Japan itself; meanwhile regarding the likelihood of it assuming this role, the EU appears behind only the US. Looking specifically at EU's effectiveness within different fields, comparing different sub-fields in culture, the EU is best regarded for its arts, and

relatively least so for multiculturalism, lifestyle and food and cuisine. In different areas linked to social development and education, the EU is seen best for education and gender equality and relatively least so for reducing income inequality, eradication of poverty and protection of minorities. In economy and Research, Science and Technology (RS&T), the EU is best regarded for tourism and least so for space exploration technologies. As regards politics and security, Japan respondents see EU's performance similarly in all listed subfields.

Mexico

In Mexico awareness of the EU compared to a list of preselected countries and organisations provided in the survey is below most of the countries, above only India, but higher than other international organisations, with the exception of the UN. EU visibility in terms of how frequently people hear about it is rather high – only under 10 per cent of respondents never hear about it or cannot provide an opinion, while over half – 60.3 per cent hear about it week or more often. The main sources for getting info on the EU are TV channels, social media, and online media (including online versions of print media). Most visible themes regarding the EU news in print media used for analysis are politics, economy and social and cultural, though the order of the latter two is reversed in the case of Europe.

The EU was among the most positively viewed countries and international organisations in Mexico. Mexico respondents find the EU among the top 3 most influential, important or attractive international actors in most areas except Research, Science and Technology (RS&T). Most common descriptors for the EU among Mexico's respondents were 'multicultural', 'modern' and 'strong'. However, as regards representations of the EU in the media, Mexico newspapers evaluated it mostly neutral, and slightly more negatively than positively, the opposite being true for Europe, which was evaluated more neutrally overall. Media regards the EU ambiguously across policy areas: there is criticism with regards to internal EU policies, such as a possible UK exit, the Greek debt crisis, the Union's overall state of economy, and its approach to the migration crisis; meanwhile the EU's image is positive in the fields of human rights, good governance, negotiations with Iran, and EU-Mexico relations.

As concerns desirability and likelihood of EU global leadership, the Mexican public ranks the EU higher than all other countries in terms of desirability of its global leadership, but behind the US, close to Japan and China in terms of the likelihood of it assuming the role. Looking specifically at EU's effectiveness within different fields, comparing different sub-fields of culture, the EU is best regarded for its monuments and museums and the arts, and relatively least so for the theatre and cinema. In different areas linked to social development and education, the EU is seen best for education and quality of life and least positively for protection of minorities and integration of migrants and refugees. In economy and RS&T, the EU is best regarded for tourism and relatively least so for space exploration technologies. As regards politics and security, Mexico respondents were most positive about EU's performance in peacekeeping operations and ensuring media freedom and least positive about its efforts in supporting developing countries and dealing with refugees and displaced people.

Russia

In Russia awareness of the EU compared to a list of preselected countries and organisations used for comparison is below all countries, but above other listed international organizations, with the exception of the UN. EU visibility in terms of how frequently people

hear about it is rather high – as many as 64 per cent of respondents hear about it more or less every day, and only 3% of respondents said they never hear about it. The main sources for getting info on the EU are TV, online media (including online versions of print media) and social media. Most visible themes in EU news in print media used for analysis are economy, politics and energy, while for Europe these were social and culture, followed by the economy and politics.

The EU was among the least positively viewed countries and international organisations in Russia. Russia respondents find the EU as somewhat influential, important or attractive actor in most thematic areas except development cooperation, where its importance is seen as relatively lower. Most common descriptors for the EU among Russia's respondents were 'hypocritical', 'multicultural' and 'arrogant'. As regards representations of the EU and Europe in the media, Russia newspapers evaluated both the EU and Europe mostly neutrally, with balanced positive and negative evaluations in both cases. In Russian media, the EU is frequently reported on, often with a local hook (e.g. sanctions), suggesting that the EU is presented by the influential news media as a close 'Other' able to impact Russia politically and economically.

As concerns desirability and likelihood of EU global leadership, the Russian public is divided in that a similar percentage of the public find it desirable as undesirable, and a larger percentage finds it likely that the EU will assume a leadership role. Compared to how Russians view preselected countries and organizations in this respect, EU leadership is less undesirable only than that of the US, while the likelihood of its leadership is higher than that of Brazil, India and Japan. Looking specifically at EU's effectiveness within different fields, comparing different sub-fields in the area of culture, the EU is best regarded for its monuments and museums as well as luxury goods and clothes, and relatively least so for history. In different areas linked to social development and education, the EU is seen best for education, quality of life and gender equality and least positively for integration of migrants and refugees and eradication of poverty. In economy and Research Science and Technology (RS&T), the EU is best regarded for tourism and relatively least so for space exploration technologies. As regards politics and security, Russia respondents were most positive about EU's performance in terms of ensuring media freedom, rule of law and protecting the environment, and least positive in terms of how it deals with refugees and its role in peacekeeping operations.

South Africa

In South Africa awareness of the EU compared to a list of preselected countries and organisations provided in the survey is below that of the countries, but above most other listed international organizations, with the exception of the UN. EU visibility in terms of how frequently people hear about it is somewhat high – as many as 54 per cent of respondents hear about it once a week or more often, with 6 per cent saying they never hear about it. The main sources for getting info on the EU are TV, online media (including online versions of print media) and social media. Most visible themes in EU news in print media used for analysis are economy, politics and social and cultural issues, while for Europe social and cultural issues were mentioned more often than politics.

The EU was among the most positively viewed countries and international organisations in South Africa. South Africa respondents find the EU as somewhat to very influential, important or attractive international actor in most thematic areas, it was among the top 3

global actors in all except the themes of global economic affairs, development cooperation and advancing worldwide Research, Science and Technology (RS&T). Most common descriptors for the EU among South Africa respondents were 'strong', 'modern' and 'multicultural'. Concerning representations of the EU and Europe in the media, South Africa press evaluated the EU and Europe mostly neutral, with negative framing slightly more frequent than positive in the remainder of the articles. With media coverage in terms of the volume of EU activities being the lowest in South Africa among the Strategic Partner (SP) countries, EU is predominantly linked to specific events of public interest, such as the UK elections, the Greek debt and migration crises or the South Africa-US Agoa dispute. In Europe coverage, interactions with Russia, Africa and the ICC are mostly reported on.

As concerns desirability and likelihood of EU global leadership, comparing to how South Africans view preselected countries in this respect, the EU appears as desirable a leader as the US and outranks other countries, however as concerns the likelihood of it assuming this role, the EU is outranked by the US and China. Looking specifically at EU's effectiveness within different fields, comparing different sub-fields of culture, the EU is best regarded for its monuments and museums as well as luxury goods and clothes, and relatively least so in terms of how the EU fares with multiculturalism. In different areas linked to social development and education, South Africa respondents had the most positive views of EU's performance in terms of education and quality of life, and least positive on EU's efforts in protection of minorities. In the area of economy and Research, Science and Technology (RS&T), the EU is seen as performing best in tourism and least so in space exploration technologies. Lastly, in politics and security, the EU's performance is viewed most positively in terms of ensuring the rule of law and relatively least so in terms of dealing with refugees and displaced people.

South Korea

In South Korea awareness of the EU compared to a list of preselected countries and organisations provided in the survey was above that most of the countries, behind only the US and China, and above other listed international organizations, with the exception of the UN. EU visibility in terms of how frequently people hear about it is rather moderate – 37 per cent of the South Korean respondents stated that such information would reach them about once a week, while another 34 per cent hear or read about the EU once a month or more often, with 7 per cent reporting that they never hear about it. The main sources for getting info on the EU are TV channels, online media (including online versions of print media) and print media. Most visible themes in EU news in print media used for analysis are economy, politics and social and cultural, whereas in Europe coverage social and cultural issues are mentioned more often than politics.

The EU was among the most positively viewed countries and multilateral organisations in South Korea. South Korean respondents find the EU among the top 3 most influential, important or attractive international actors in all areas except global economic affairs. Most common descriptors for the EU among South Korea's respondents were 'modern', 'peaceful' and 'multicultural'. As regards representations of the EU in the media, South Korea newspapers evaluated it mostly neutrally, but in the remainder of the articles negative framing was more common than positive for EU news. As concerns more specifically EU news, in the politics frame the chosen outlets were more inclined to cover internal issues of the EU, such as the UK election, than external ones. In the economy frame, the state of economy, business/finance and trade issues were dominant - more specifically, the Greek

economic crisis, the ECB's quantitative easing and trade between the EU and South Korea. In the social affairs frame, migration in relation to the refugee crisis ranked first, followed by health care and social legislation, specifically welfare laws.

As concerns desirability and likelihood of EU global leadership, the South Korean public ranks the EU only behind the US in terms of how desirable its leadership would be, however places it behind China as well concerning the likelihood of it assuming this role. Looking specifically at EU's effectiveness within different fields, comparing how it fares in different sub-fields of culture, the EU is best regarded for its monuments and museums, as well as arts, and relatively least so for multiculturalism. In different areas linked to social development and education, the EU is seen best for education, quality of life and gender equality, and least positively for integration of migrants and refugees. In economy and Research, Science and Technology (RS&T), the EU is best regarded for tourism and relatively least so for space exploration technologies and the entertainment industry, media and publishing. As regards politics and security, South Korea respondents were most positive about the EU's performance in terms of foreign policy, peacekeeping operations and ensuring media freedom, and least so about its efforts in dealing with refugees and displaced people.

USA

In the US awareness of the EU compared to a list of preselected countries and organisations provided in the survey was below that of the countries, but above other listed international organizations, with the exception of the UN. EU visibility in terms of how frequently people hear about the EU is rather low, as many as 24 per cent of the American respondents never hear about it or cannot provide an opinion, while only 11 per cent hear about it every day or week. The main sources for getting info on the EU are TV channels, online media (including online versions of print media) and print media. Most visible themes in both EU and Europe news in print media used for analysis are politics, economy and social and cultural.

The EU was among the most positively viewed countries and international organisations in the US. American respondents find the EU is among the top 3 most influential, important or attractive international actors in most areas except Research, Science and Technology (RS&T). Most common descriptors for the EU among US respondents were 'multicultural', 'modern' and 'peaceful'. As regards representations of the EU in the media, US newspapers presented balanced evaluations, most of which were neutral. The remainder of the articles were more often framed negatively than positively, with Europe coverage overall more neutral. In the US, media portrays the EU most often when dealing with the migration crisis, the Greek debt crisis, the anti-trust cases against Google, environmental policies and the Iran nuclear deal. Remarkably, the media reports on EU issues using a low share of EU news with a 'local hook', that is, reports are not connecting EU topics to (local) events and developments in the US.

As concerns desirability and likelihood of EU global leadership, the American public ranks the EU only behind the US itself, meanwhile regarding the likelihood of it assuming this role, the EU is slightly behind China as well. Looking specifically at EU's effectiveness within different fields, comparing different subfields in culture, the EU is best regarded for its monuments and museums and history, and relatively least so for the theatre, cinema and sports. In different areas linked to social development and education, the EU is seen best for education and quality of life and least so for protection of minorities, reducing income inequality and integration of migrants and refugees. In economy and RS&T, the EU is best

regarded for tourism and least so for space exploration technologies. As regards politics and security, US respondents were slightly less positive about EU's efforts in dealing with refugees and displaced people.

6.1.3 Main findings on EU and Europe

Drawing mainly from the insights of the media analysis and the public opinion poll as the most recent and representative data set, several differences and commonalities in the perception of **EU** vis-à-vis **Europe** emerge.

While the media is effective in reporting current news/ crises it seems less able, capable or interested in covering other **EU** policy spheres. This presents several problems: the constantly changing nature of news on the **EU** as crises come and go; a general contextualisation of **Europe** being reactive rather than proactive; and a diminished local relevance for the Strategic Partners as **Europe** is principally examined in isolation rather than through any local or bilateral linkages.

Across all countries, media reports mainly on the **EU** in connection to dramatic events and crises, such as Grexit, Brexit, and the migration crisis. The reporting is characterised by strong negative connotations associated with the events taking place in the **EU**, as well as the EU's role in coping with them. Further topics of high interest are high-level visits and interactions with the respective countries (e.g. the EU-China Summit, or the EU-CELAC Summit). **Europe**, on the other hand, is mainly used as a geographical indicator and connected to a broad range of topics, ranging from culture, lifestyle and art sections, to business, world, and main local news. As for the visibility of the **Member States** within the EU news stories, in all 10 countries the same four Member States stood out: Greece, Germany, Britain and France. Asked about the attractiveness of Member States, the general public mentioned France, Germany and Italy most often.

The **EU** is framed in media and seen by the public to act mainly in the political, economic and social spheres, while the **EU's** actions in other areas analysed in this study (energy, environment, RS&T, development) are only limitedly or not at all covered. The local hook matters: media in all countries assigned higher visibility to **EU** actions when they were directed explicitly at that respective country, its immediate geopolitical region, or its key partners. Generally, the actions of the **EU**, its institutions and leaders are evaluated as neutral, but in three most visible areas of political, economic and social affairs, evaluations are more negative than positive.

As **Europe** is mainly used as a geographical concept, references to the actions of **Europe** are limited; in few cases (especially in India), both terms are used as synonyms; on average 20 per cent of respondents across countries saw no difference between the **EU** and **Europe**. Compared to the **EU**, reports on **Europe** cover mainly a broad spectrum of social topics, and to a limited extent economic topics. The general public connects **Europe** most strongly with culture and sport, as well as science. In comparison with **EU** news, the number of stories about **Europe** in the areas of research, science and technology was slightly higher, but again reporting on environment and energy was very low. A common trend of positive, negative or neutral evaluations of **Europe's** actions cannot be identified. The number of articles covering the normative power of both the **EU** and **Europe** was very low.

6.1.4 Regional findings

The analysis of the data across all building blocks for this study shows that countries stood out with their individual characteristics and neither regional trends nor trends along other groupings such as BRICS have been identifiable to date.

The extensive literature review carried out for this study showed that regional commonalities are non-existent, and that the level of analysis is either on the country or overarching level. The findings of this study correspond to this: media analysis shows that media in each country tells a different story that is very much linked to the local context, or report on topics (e.g. the migration crisis) that are of interest across all countries. Likewise, in the public opinion poll, specific regional nuances could not be detected: across all countries, the general public leans towards similar directions, e.g. negative views spurred by the migration crisis. The responses of outliers (e.g. Russia in many questions) can be traced back to their specific country context and not their regional embedment. The interviews reflect this: interviewees predominantly referenced their country's context with regards to relations with the EU and Europe, and more often emphasised the differences rather than commonalities between their neighbours.

In conclusion, the summary of findings has shown that there are global EU and Europe themes such as economy and, secondly, the EU as a political actor. In line with the globalising world, internal news such as crises are reported independently of their internal character or their distance to the respective country. Local conditions impact perceptions significantly, showing that while there is a request for consistent EU core messages, the implementation of EU Public Diplomacy activities will have to be decentralised and tailor-made to local conditions on-site of the EU Strategic Partner country.

6.2 Policy recommendations

6.2.1 Introduction

According to the ToR, the Final Report has to include 'some policy recommendations', outlining how to improve the EU's outreach strategy and improve its perception. The following recommendations presented in this section are a synthetic version based on individual outputs and methods used for the AA and the CCs, as well as the recommendations based on the interviews with the EU Delegations in the ten SP countries and the STR. The recommendations were also reviewed and revised by the country experts (mostly academics), to cross-check their validity and applicability.

The recommendations section consists of five parts:

- 1) Overarching Public Diplomacy recommendations
- 2) Recommendations concerning implementation of the EU Public Diplomacy strategy
- 3) Overarching media recommendations
- 4) Overarching social media recommendations
- 5) Country-specific recommendations

The overarching (1-4) as well as country-level (5) recommendations should be considered together as the former may inform the other. In fact, recommendations for one country may well be found useful and relevant in other countries and provide stakeholders with additional opportunities for synergies when developing country-specific PD activities. Some

of the ideas and actions suggested in this chapter have been identified in previous studies, but are still prevailing; they draw on evidence we identified in our research and can be seen as a re-affirmation of previous work. The country-based outputs (media and public opinion, informed by interviews and CE's expertise) of this study serve as a pool of rich and in-depth information that will help with the development of customised communication strategies and guidelines for their implementation. They are uploaded on the e-directory for further use.

The recommendations offer a set of possibilities and suggestions to feed into the EU's Public Diplomacy where suitable. It is complemented by Chapter 4, which presents suggestions concerning target groups, audiences and (potential) partner organisations. When developing the new strategy, it is a political strategic decision (for the Commission, EEAS) which target groups/ audiences to prioritise and what kind of strategy to adopt: addressing weaknesses (cases where the perception of Europe and the EU is rather negative) or playing on strengths (positive perceptions of, for example, European culture or EU as a welfare society).

6.2.2 Overarching Public Diplomacy strategy

Establish a centralised Public Diplomacy strategy with a decentralised implementation plan to adjust to local specificities

The EU suffers from a 'priority problem' as the sheer volume of statements and declarations dilutes the focus of external messages. Statements are seen to be frequently not followed-up with meaningful and coordinated regional or national Public Diplomacy efforts. The EU is repeatedly assessed by external observers as over-complex, lacking transparency and with a tendency to over-promise and under-deliver. There are structural challenges due to the intertwined responsibilities between the Commission and the European External Action Service (EEAS) and the relationship between different Directorates General (DGs) that implement initiatives with implications for Public Diplomacy (PD).

- Develop a comprehensive and centralised Public Diplomacy framework and strategy, ensuring sufficient flexibility for Delegations on the operational level in order to adapt outreach to national and local contexts.
- Identify a finite set of core messages in cooperation with EU Delegations, encompassing common areas of interest, key topics, and key target groups that the EU Delegations can work with. Targeted and innovative Public Diplomacy activities along core messages have more impact than a large number of activities. Inputs from Brussels HQ need to be provided in timely manner with consideration of time zone differences and translation needed. Innovation should be encouraged given that often availability of resources is but one and not the most significant factor of success.
- Enhance EU's consistency and credibility through designing multi-annual Public Diplomacy frameworks/ strategies on a partner country level.

Strive for an ever better coordination with the Member States

The EU is frequently perceived as lacking unity and partially inconsistent. There is a certain overlap between Public Diplomacy efforts of the Member States, the European External Action Service and the European Commission. Meanwhile, the public opinion survey revealed that the most attractive EU MSs differ quite substantially among the 10 strategic countries and synergy would be highest when linking the EU to them.

- Strengthen coordination with EU Member States by aiming for joint strategic approaches as well as regular and institutionalised coordination meetings within the respective SP country in order to better synchronise outreach and reinforce messages wherever possible. This would also help to share experiences and draw on the Public Diplomacy expertise of the Member States.
- Aim for a common direction and determine a set of core messages relating to the Public Diplomacy framework.
- Highlight the added-value that the EU adds to the efforts of the Member States openly rather than trying to profile the EU exclusively.

Engage in Cultural Diplomacy drawing on the very positive perceptions across the SP countries of European/ EU Member States' culture, arts, history

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

- Support initiatives of cooperation in the field of culture, look out for new and innovative approaches, engage better with the youth culture and empower local cultural actors.
- Support people-to-people exchanges in a spirit of equal partnerships, mutual learning and co-creation. Avoid promotional and showcasing approach as it is neither sufficient nor acceptable for the EU to engage with its foreign partners.

Take advantage of the local knowledge accumulated by the EU Delegations

Successful outreach depends on financial means, the thematic areas, the targeted audience and innovative approaches. These differ between countries. The EU Delegations have the knowledge concerning local context and local actors as well as skills and expertise in reaching out.

- Encourage EU Delegations to determine their target groups' views and needs through regular analysis of their opinions and perceptions. Such regular country-specific 'listening' exercises would lay the foundation to the design of effective activities with a sufficient mandate for decision-making.
- Identify national foci in close cooperation with the Delegations (who in their turn would work in close contact with local experts) for tailor-made communication while the EU Delegations would work on detailed implementation.
- Find trusted local partners in SP countries (such as Jean Monnet EU centres) to increase and retain the contextual knowledge.

Make regular high-level visits an integral part of Public Diplomacy effort

High level visits – undertaken regularly – are crucial instruments for high visibility and a chance for EU Delegations to promote their messages.

- Arrange frequent high level visits in all Strategic Partner countries to promote the visibility of EU Delegations and their programmes

- See *media recommendations section (below)* for additional suggestions on communicating high level visits

Formulate and target the messages while being aware of differing interpretations of history

Analysis shows that history and especially colonial experiences can still affect the perceptions of contemporary relations.

- Carefully remove any Eurocentric notion of European superiority from dialogues with any actors in Strategic Partner countries, particularly in countries that have experienced European colonialism.
- Take into account potential resentments due to historical encounters when providing development aid or negotiating FTAs to anticipate allegations toward the EU of pursuing a ‘civilisational’ agenda.

6.2.3 *Implementation of the strategy*

Provide multi-annual, lump sum budgets to Delegations

Budgets vary across SP countries’ EU Delegations and are often miniscule compared to Member States’ capacities. Moreover, many projects of other DGs, first and foremost DEVCO projects, entail financial positions for ‘visibility measures’ that are not combined with each other.

- Combine all funds related to PD/ visibility measures to a multi-annual, lump sum budget that the EU Delegation can assign to a comprehensive implementation strategy for its PD activities tailored to local conditions.
- Establish realistic and focused Public Diplomacy goals commensurate with budget, rather than opting for goals that are overly broad and difficult to measure.

Slim down bureaucratic and hierarchical hurdles to reduce use of human resources for administrative processes

Cumbersome, lengthy bureaucratic processes and hierarchical structures between DGs, EEAS HQ and Delegations and budgetary processes within PD activities currently make fast responses and tailor-made approaches difficult while consuming substantial (human) resources for the administration.

- Streamline processes and decentralise competencies in order to focus resources on the PD activity itself, thereby contributing to a more effective PD.

Initiate and engage with expert networks

Expert networks are particularly influential potential partners and multipliers for EU outreach. They serve as knowledge ‘hubs’ and complement physical exchange programmes between EU and partner countries.

- Establish platforms for interested experts to interconnect, exchange ideas and share information on selected policy fields that are relevant to EU PD.

- Involve local experts into Public Diplomacy design, ‘listening’ exercises (e.g. perceptions and images surveys). Consult them on how to anchor centrally-formulated messages and strategies to local discourses.
- The relevant experts include, for example, academics who teach/ research about the EU, journalists who specialise in Europe, editors of the papers who publish a lot about Europe, NGOs who have European partners or European support, secondary school educators who teach about Europe, etc.

Engage local civil society and the youth for wider outreach and local resonance

Civil society engagement activities are rather underdeveloped within Delegations’ PD outreach. There is a need for a more intensive engagement of civil society actors as current PD initiatives are primarily determined by the EEAS’ capabilities. The public opinion survey showed that in most countries (except the USA, Canada, and Japan) there is a tendency that perception of the EU in the general population grows more positive as the age increases. This means that the EU might be failing to attract the interest of the youth.

- Engage in discussion, support networking, initiate or mediate exchanges of activists, develop media strategies targeting particular groups.

Use e-diplomacy to make Public Diplomacy more effective and to reach distant audiences

Various studies have shown that minorities in highly heterogeneous populations do not feel their needs addressed by EU programmes. Meanwhile, Public Diplomacy increasingly relies on digital means which is an essential tool to reach out more broadly, including distant audiences.

- Further embrace the use of online/ social media to target civil society, media and youth.
- Provide specialised training, recurring along technological progress cycles, to officials at EU Delegations in order to improve digital diplomacy and social media skills for a successful design and implementation of e-diplomacy actions.

Ensure flexibility and decentralised decision-making in the case of unexpected events

Unexpected events require fast and flexible responses and only timely, tailor-made responses ensure the desired message to come across to the target audience.

- Ensure EU Delegations’ flexibility in the case of unexpected events through sufficient local resource allocation and decentralised decision-making.

Make evaluation an integral part of the outreach activities

Regular and systematic evaluation cycles of EU PD activities on a national and across key countries level are crucial in order to assess results and learn from the experience. Despite evaluation projects that have been or are being implemented, systematic evaluation and cross-country comparisons of Public Diplomacy initiatives have so far not been a standard part of EU Delegation’s outreach initiatives.

- Establish an EU PD Strategy Committee in Brussels HQ in charge of evaluating the implementation of EU’s PD.

- Create a web-based regularly updated data-pool of on-going PD initiatives in the EUDs, EU Member States and other major Public Diplomacy actors in the world.
- Make impact assessments and evaluations of Public Diplomacy initiatives accessible for all Delegations, in order to share lessons learned among Delegations.
- Design centrally specific and consistent evaluation tools – such as this study’s baseline indicators – in order to provide the Delegations with synchronized measurement tools for the success of their outreach activities.
- Conduct regular public opinion polls, interviews and media analyses at the country level using consistent and comparable methodology across the borders.

Conduct expert and elite interviews from representative samples on a regular basis

Elite interviews serve to depict (changing) perceptions of the European Union among different societal groups. These groups contain different influential actors, such as academics, policy-makers, civil society leaders or media directors who may act as multipliers as well as mediums to explain shifts in (public) perception and evaluation of the EU in general, or specific policies.

- Conduct interviews with representatives from academia and think tanks, media, civil society, youth, business sector and policy-makers.
- Use a uniformly designed set of questionnaires to enable comparability across countries and periods of time.

6.2.4 Overall media recommendations

Our systematic media analysis points to some striking commonalities in how the individual press discourses in Strategic Partner countries framed the EU/ Europe (also discussed in the comparative media report in Annex IV). The following recommendations – derived from those commonalities – will help inform a meaningful nuanced dialogue between the EU and third countries’ opinion-makers – leading journalists and media gate-keepers (editors, editors-in-chief, directors of news, news producers, etc.). These recommendations aim to ensure a respectful, engaged and open dialogue with the newsmakers – a cohort argued to be critical for the success of the EU’s Public Diplomacy in an increasingly multipolar globalising world where news has become a commodity expected to generate profit for media organisations. Three broad lessons are addressed: what topics resonate best among the SP; which are the media targets to be prioritised; and around what elements should the EU structure its positive branding?

Devise location-specific media outreach programmes

News-making practices in the SP countries clearly demonstrate the absence of direct EU input into the news-making processes in the 10 SPs. There is a diverse background of the correspondents and outlets they represent, differences between the media systems across the 10 countries, and differing professional and cultural practices in news production. The nuanced knowledge/ awareness of local news making realities and cultural practices linked to them presents an opportunity to EU PD practitioners, and the lack of it is a clear risk to a successful Public Diplomacy outreach through media.

- EU Public Diplomacy experts (in HQs and on the ground in SPs) must devise location-specific media outreach programmes within a highly differentiated approach. To better facilitate ‘courting’, local EU Delegations, with assistance and support from the

HQ, should devise individualised outreach programmes specific to the profiles/missions of the main national opinion-making sources and supply information that will resonate with those outlets.

- If an outlet specialises on business news, EUDs may supply the most recent, and thought/ discussion to provoke debate, updates and information about the EU in the business field;
- If an outlet uses a lot of visual support in their news coverage (especially photos), the EU should be proactive and provide relevant, high quality and interesting images with EU symbolism/ faces in them for free;
- If an outlet is already reliant on international sources, the EU should provide some 'hottest' news updates from HQ *before* they hit the mainstream channels of communication exchanges;
- If an outlet prefers to publish only local authors, the EU should approach that outlet's key news writers who specialise in Europe/ EU news for personal exchanges/ visits/ meetings, etc.

Organise the exchange of experiences on engaging with media among EU Delegations

Within EU Delegations in the 10 SPs there are various levels of experiences in advocacy. For example, in the previous studies by the NCRE, the EU Delegation to the US was noted to have a press team who was tasked to help 'foster well informed media coverage of issues relating to the EU and EU-US relations through proactive outreach to journalists and by facilitating interviews, placing op-eds, and providing support to visiting EU officials' (EU Insight, 2010).

- Share internal expertise and know-how, media research and targeting strategies, good as well as unsuccessful practices.

Use high profile visits combined with a high profile outreach programme towards media to communicate how the EU is dealing with crises

If all the EU 'crises' reports were removed from the media content under observation, the EU would be an actor with severely limited media visibility in all 10 locations. The lack of international media interest in the EU's institutions and architecture is a definite risk for EU Public Diplomacy. One strategy to increase the EU's media visibility and mitigate a negative shadow left by the many crises erupting in the EU is to undertake immediate high-profile visits to the SPs whenever a crisis strikes. On-going EU perceptions research by the NCRE indicates that newsmakers in general feel 'under-courted' by EU Public Diplomacy in comparison with politicians or business people. This lack of attention to the local newsmakers on behalf of the EU constitutes a risk for EU PD.

- The news media analysis indicated that irrespective of any political system or media environment, a high profile visit from the EU to the SP – accompanied by a diverse and high-profile outreach programme – will attract extensive media attention 'redirecting' attention and intensity from the coverage of EU-specific events (such as crises). The top level EU visitors outreaching to media in an open, dialogue-based mode (assisted and moderated by the local EU Delegations) can elicit an increased level of local newsmakers' attention.
- The visits must target the media's most influential individuals – both within the audiences of the SP establishment during the visit, as well as in targeted, media-focused events (not just press-conferences). In these events newsmakers are invited

for round-tables or seminars to engage in a dialogue with the high profile EU visitors. The timing in communication with SPs is crucial.

- Such a visit should profile an open and transparent analysis of an unfolding crisis – personal commentary by an EU ‘VIP’ will make its way into local media instantaneously, as it will be a ‘hot’ news at that moment.
- The EU messages generated by the EU top visitors (who are treated here as an opportunity for the EU) should also necessarily stress how the European community is creatively overcoming this crisis together, evolving and learning from its own mistakes. The EU message also should emphasise that overcoming crises in the EU presents new opportunities for the location in question. The local ‘hook’ is paramount.

Focus on 3-5 most influential news sources with deep respect to the ‘local’

It is understood that resources are finite for such targeted media outreach campaigns. Consequently, a realistic target should be set: in-depth outreach media campaigns ideally would focus on no more than the 3-5 most influential and highest circulation papers (or online sources) plus the most watched/ highest rating national prime time television news in each location. The key is to understand the vision and the mission of those outlets and assisting them in acquiring the most useful (in their own eyes) resonant information about international affairs (the EU in this case).

- Importantly, these outreach campaigns targeting the most influential media sources in third countries should be designed by the EU with deep respect to the ‘local’, avoiding Eurocentric attitudes, and in a dialogic mode, with particular attention to the cross-cultural modes of communication between the EUDs and the leading media outlets. Obviously, any such outreach should be informed by an understanding of the values and codes of conduct operating in each media environment. Outreach in this communication must avoid ‘preaching’ and top-down attitudes – a strong risk factor.

Identify and approach the local news authors who specialise on the EU and Europe news

News authors who specialise on the EU and Europe news offer the EU Public Diplomacy a strong opportunity on the ground. In many SP countries reporting on the EU and Europe relied heavily on local-correspondents or local sources. Timing is seen as the crucial element in the exchanges between the EU and local newsmakers. Previous perceptions research undertaken by the NCRE (in that research, large media elite cohorts in 16 countries were approached for in-depth interview) (Chaban 2012; Chaban and Holland 2015) indicates that the newsmakers in third countries are willing to consider EU press-releases in general. If the press-releases are informative, detailed, not boring, and even provocative – and released within at least an hour of the major event/ crisis/ drama – the newsmakers will consider using them as a news source.

- To facilitate their interest, these journalists should be regularly invited to the events organised by the EU Delegations (seminars, receptions, public lectures, etc.). The Delegations should regularly tweet/ Weibo to these journalists (previous perceptions studies by the NCRE have indicated that Twitter is the top social platform that alerts the newsmakers about the ‘hot’ issue). These newsmakers should be prioritised for exchanges supported by the EU; and always be invited when EU VIPs are visiting. They may also be given priority access by the Delegations for ‘exclusive’ interviews.

- The Delegations should send these journalists press releases in a timely manner and even on the eve or *in advance* of major events or any major EU-location interaction. This is an effective tool to secure media's interest. Anything that is perceived by local newsmakers to give them a competitive edge in the 'hot' news production is highly valued and appreciated. This is even more so in the countries whose news media is more likely to use international sources. Any delays in EU communication with the SP increase the risks for EU Public Diplomacy not to succeed.
- Any such press releases must underline the relevance of the initiative in order to gain the journalists' engagement – for example, by 'twinning' of issues that resonate in the EU and locally (such as border security in the EU and Mexico or the USA).

Engage in exchange diplomacy

Exchange diplomacy involves sending local journalists to the EU and reciprocally accepting journalists from EU and EU Member States. EU Public Diplomacy should continue to support EU Delegations' journalistic award competitions that facilitate the awardees to visit Brussels to meet with EU practitioners and scholars, MEPs, business leaders and fellow journalists. Limited scale of such visits is among the risk factors for EU PD.

- Newsmakers in the third countries – both those who focus on EU/ Europe news and those who do not – should become targets of *exchange diplomacies*.
- Exchanges between the newsmakers should be true exchanges, i.e. SPs' newsmakers go to Europe, and newsmakers from the EU come to SPs. This two-way interaction can be very productive. Moreover, the newsmakers from both sides should be placed within media organisations and their news stories – independent or co-authored with the local authors – published by the host outlets. *Collaboration* is the most challenging yet the most rewarding type of Public Diplomacy activity that presents an enormous opportunity for EU PD outreach.

Increase the EU's visibility with messages with a local hook

In all 10 locations certain EU facets remained with low visibility. Among the lowest in visibility were international development, environment, energy, research/ science/ technology and education – issue-areas in which the EU sees itself as having the greatest cache and recognition around the world. This presents risks in terms of feeding back to the EU citizens who are also proud of these identity markers. Importantly, information provided by EU sources – top level visitors or by the EU Delegations – is more likely to appear in the news if there is a perceptible 'local hook'. In other words, the EU is seen to MATTER to the location (impact, affect, change, provoke, improve, challenge, etc.). If there is a presence of some sort of conflict in this piece of information, that would increase the chances of this information being picked up by news makers.

- In all 10 locations the public opinion surveys demonstrated that the thematic area of environmental protection (both within the EU and globally) and sustainable energy attracted both on-going interest and positive attention. Yet, this was not the main area of interest in the media coverage – the volume of news was relatively low across all 10 countries; however it can be a highly positive area of reporting and it tends to intensify in volume as the annual COPs approach (i.e. it is cyclical in nature). Environment and sustainable energy – issue-areas in which the EU is often assessed as a high achiever and successful example to learn from – elicit high interest among

elites and the general public. The recommendation is to use and strategically promote these thematic fields to local media as the topic is already highly resonating with the local publics' interests.

- The EU HQ and EU Delegations should engage high profile European experts (if not 'celebrities' in the environmental/ sustainable energy field, e.g. Nobel Prize winners from Europe). They can also initiate and support exchanges between journalists, key experts, academics, think tanks, NGOs, tertiary and secondary school children in the field of environment and sustainable energy on a large scale. These coordinated schemes of exchanges supported by the EU could include a key requirement for each beneficiary to publicise their experiences, dialogues and collaborations with the EU counterparts writing in the local influential media, social media on their discoveries in Europe/ the EU upon their return. This reflection and public profile should be the requirement of the exchanges in general (and in the environmental/ sustainable energy fields in particular).
- RS&T and education news are in general highly specialised topics which require additional expertise and cognitive investment from the news writers and readers. The global news-making reality that sees news as a commodity suggests that this issue-area will remain under-reported and the EU news profile for this area will remain peripheral. One way to redress this is through the reportage of the EU's RS&T and educational partnerships with local partners (especially if those are of high local visibility and/ or status). In this regard, the EU Delegations should monitor the RS&T and education collaborations supported by the EU and inform the local media about these (as well as asking the local researchers/ academics/ students supported by the EU to publicise their collaboration). Such information is better communicated through Twitter or other social platforms that are used by the newsmakers to scout for news.

Draw on the concept of Europe to promote EU's messages

*The juxtaposition of the two concepts that were employed within the media analysis – the EU and Europe – suggests some opportunities for EU Public Diplomacy to utilise the concept of Europe to promote the EU's messages when communicating with the local newsmakers. Media analysis has indicated that in **the field of economy**, the EU was firmly framed within the theme 'state of economy' often attracting mixed evaluations – as an entity hit by economic crisis and a body that is trying to overcome the crisis. In contrast, when Europe was referenced (exclusively, without referencing the EU), it was framed acting in the areas of business and finance in some locations, in trade in others and with more neutral evaluations assigned to it. Also, reportage of 'Europe' in the economy field often portrayed local business involvement. The EU reportage tended to focus on the events inside the Union. Europe was also framed in a more diverse way when the local papers reported **on social affairs**. In addition, Europe was often presented as a location with a desired lifestyle, attractive for tourism. The EU's reportage in the social affairs frame tended to focus on the dramatic circumstances of the Mediterranean irregular migration crisis, typically with negative connotations. This reportage overshadowed all other topics in the representations of the EU as a social actor.*

- Reporting Europe may present a potential for EU business diplomacy in a way that the EU Delegations could use business papers and the concept of 'Europe' as a vehicle to deliver messages about the EU as an international partner who presents economic opportunities for the location in question whilst avoiding the currently more economically toxic framework of the 'EU'.

- The concept of 'Europe' could be used by EU Public Diplomacy effort as a vehicle to deliver messages about the EU as a successful cultural and social affairs actor.

Work with the major international news agencies, consider the viability of establishing a multilingual 'EU-news agency'

International news broadcasting in the Public Diplomacy practice stands for using media technologies to engage with foreign publics. This angle in EU Public Diplomacy should 'zoom in' on 'reporter-source relationship' (Park 2003). In the realm of international news it means that 'in many cases media workers do not themselves experience the events' (Shoemaker and Vos 2009: 85), thus the high reliance on international wires, prestigious outlets, and press releases and press conferences by foreign embassies and the local ministries of foreign affairs. This dependence on 'second-hand' information is of a primary concern for the external imagery of the EU. 'The version of reality as processed by sources' (Shoemaker and Vos 2009: 85) could carry a very specific 'flavour' – for example, the 'Euro-sceptic twist' typical of some British sources, the 'Euro-distant taste' observed in some American sources, or the magnified 'solo Euro-nation' perspective detected in some continental wires (e.g. AFP). The dependency on a limited set of international news sources is a risk for EU PD.

- The media analysis demonstrated that there is only a handful of international news agencies that supply EU/ Europe news to the news outlets in the analysed countries. EU Public Diplomacy experts could consider approaching (through think tanks, image/ PR companies) the major international news agencies and supply news about the EU to be disseminated through the major international wires. These wires tend to supply news not only for the 10 SPs but globally.
- EU policy- and decision-makers may consider the viability of establishing a multilingual 'EU-news agency' to promote easy access to EU news for third-country newsmakers.

Conduct regular media monitoring and analysis

Comparing the media findings of this project with the results of the previous EU perceptions projects in third countries it is obvious that there has been a deterioration in the EU's media image – a major risk for the EU's Public Diplomacy world-wide. A new set of crises in 2015 triggered visible negativity. Even more importantly, the reportage of the EU's crises has been consistent over an extended period and its impact has been to cement the negativity and scepticism in the representations of the EU by the international media. This needs to be countered by effective PD as soon as possible. The future dynamics of the EU's media images is undetermined.

- There is a need for another comprehensive study of EU external images in influential international media – in two or three years – to test if the revised public outreach results in actual improvement of the seemingly deteriorating image of the EU. Such projects present a unique opportunity for the EU public to reflect on their practices and revise them accordingly, while prioritising listening to the receivers of the diplomatic messages.
- As members of the national elites, media respondents are well-informed, well-educated and trained professionals who are well-travelled and professionally exposed to global current events. Future studies of EU perceptions must include a targeted study of newsmakers perceptions of the EU, alongside the continuing study

of EU images in the influential news sources. Regular surveys of third country newsmakers' opinions would constitute one of the forms of *listening* (a level in Public Diplomacy conceptualisation and activities, according to Cull (2008)). Importantly, the newsmakers in those future studies must be drawn from various sectors within the media – diverse press, broadcast media (television and radio) and 'new' media (online outlets, bloggers, etc.). A systematic survey of their opinion is a critical step to understanding the peculiarities of EU/ Europe news production in each location.

- There is a need for building media monitoring and analysis capacity inside the EU Delegations (for example, the press officers) by increasing the awareness of the monitoring tools and approaches and providing relevant training.

6.2.5 Overall social media recommendations

Ensure active, relevant and extensive presence on Twitter

Some events were not well profiled by the EU in terms of the volume or depth of communication. Tweets/ retweets often neither represented EU communications, nor did they contain references to the EU.

- Initiate an online Twitter campaign, by highlighting, for example, the Union's achievements with regards to decreasing phone charges or by making a point that citizens can reach their MEPs and representatives of the Commission through Twitter.
- Post and respond to tweets and retweets every day and especially during the peak time as it works on the 'geyser effect'.
- Post tweets or retweets on other EU accounts/ channels and EU hashtags in order to create an interconnected web of users.
- Post tweets or retweets on general hashtags and accounts/ channels, for example in regards to particular events and discussions; these engage a wider audience, and can also potentially increase the number of followers.
- Post tweets and retweets on wider network including the 10 EU SP countries. Twitter can be used to communicate with (potential) migrants, as many of them are misinformed about what to expect in Europe.
- Raise EU Twitter celebrities.

Provide easy access to information

Information is scattered and it took considerable time to identify the 118 EU accounts/ channels used for our research.

- Establish and regularly update a central portal with all EU Twitter accounts. Include a help section, where citizens will be able to leave their messages if they request contact information in case they cannot find it through the website. This centralised website should be advertised and should include all EU institutions as well as links to Delegations abroad.

Engage in an active dialogue with citizens (EU and non-EU)

Dialogue on social media is a quick and relatively cheap way to gain information, ideas, or feedback on public policies. Social media communication could be also strategically released to narrate a certain agenda.

- Identify authors with whom to launch an on-going or sporadic communication in order to test different ideas or in order for them to spread these ideas or information.
- In countries where Twitter is not accessible (e.g. China), identify similar platforms and engage with the local population.
- Engage in dialogue after each major event, monitor the on-going communication.

Ensure systematic monitoring and analysis of social media data

Social media has emerged as a new and effective communication mechanism in international relations. It is a new instrument for 'winning hearts and minds' globally, largely due to the more effective spread of strategic narratives. By May 2015, Twitter had 302 million active users worldwide, making it one of the largest social media platform and herewith an effective tool for Public Diplomacy. The online platform offers 'for the first time, normative models of public spheres and cosmopolitan dialogue' (Miskimmon et al. 2013). Hence, there is a need for further study of Twitter communications, especially of dialogic tweets, which are difficult to identify at this stage.

- Monitor all types of tweets/ retweets of all lengths (e.g. comment or news jacking type of tweets/ retweets, including primitive, rude or entertaining ones). Monitoring can be made continuously (non-stop), regularly, or randomly in times of events, meetings or negotiations.
- The analysis of monitored data requires quantitative and qualitative tools, but preferably in-depth approaches. Focus needs to be on several variables, frames and themes, including conceptual metaphors.
- Examine the 'geyser effect' of Twitter traffic. Do it during major events as well as 'uneventful' periods – in order to gain comparative understanding of the effect. This should ideally combine exploratory quantitative analysis with in-depth qualitative analysis of the data.

6.2.6 Country-specific recommendations

BRAZIL

Engage in a stratified dialogue with different audiences

There is no single Brazilian perception of the EU and Europe. There are differences according to the level of education, personal background (e.g. being of European descent), region in Brazil where the person comes from/ lives, as well as age (older people are seen to be more oriented towards Europe while younger towards the US). Cultural, political, ethnical and even linguistic diversity of the country is a challenge for designing tailor-made PD activities. Business elites and liberal (in economic terms) political elites have a more positive perspective of the EU as a powerful trade and investment partner while left-leaning political elites and civil society groups tend to be more critical towards the EU's economic role and EU-Mercosur negotiations. Yet even among these groups, the EU is appreciated due to its perceived interest in social standards. For various societal groups the EU still serves as a model for regional integration – although this image is increasingly contested.

- EU Public Diplomacy in Brazil would gain from stratified dialogues with a range of objectives – from sharing successes of EU's welfare model, to honest debate and learning from the others.
- EU Public Diplomacy should invest into targeting the younger generation, which has a more sceptical view of the EU as compared to the older age cohort.
- As Brazil is a very large country with diverse publics, media access and infrastructural conditions, PD outreach should focus on the distribution of information via social media and radio.
- Consider establishing mission in Sao Paulo – this would positively impact the outreach and broaden the scope of Public Diplomacy.

Engage into a pro-active outreach towards Brazilian newsmakers

Beyond trade relations, deeper and more diverse connections between Brazil and Europe are missing in the news. Brazilian media demonstrated a relatively high share of news about the EU coming from international sources, which suggests openness among newsmakers to take into account external views.

- EU Public Diplomacy should design and undertake a pro-active outreach towards Brazilian newsmakers, engaging in discussion and delivering newsworthy information about diverse facets of EU-Brazil collaboration.

Centre Public Diplomacy messages on resonating topics and normative visions

In the eyes of the Brazilian general public, the EU is among the most positively viewed international actors (below only Japan and the US). The EU was most commonly perceived by the general public as strong, efficient and multicultural and modern. The study revealed a perception of cultural affinity and resonance, and within that, a vision that Brazil is 'embedded in European values'. The European model of development is usually considered preferable to that of the United States, particularly with regards to welfare. Education is seen as one of the best achievements of this welfare system. The EU is also seen as lacking coherence on immigration, which is perceived as its greatest challenge.

- Resonating normative visions – rather than clashing ones – should be used to inform EU Public Diplomacy messages.
- Public Diplomacy should prioritise education and social welfare to boost the EU's profile among tertiary education and civil society stakeholders.
- EU Public Diplomacy could initiate an open conversation concerning the questions of immigration, integration and multiculturalism demonstrating that the EU is willing to learn from Brazil, a multicultural society on its own right.
- Global challenges, especially the promotion of human rights and climate change, are of increasing interest among (political) elites. For the Brazilian general public, the topic 'internet security' is of particular importance.

Address the perception of the EU having a 'hearing problem'

Brazil often sees the EU as having a 'hearing' problem and refusing to accept other's norms and values. Thus, one source of images is the perceived conflict between the EU as an arrogant and assertive norm-setter who presents itself as the model (despite ensuing crises) and increasingly confident Brazil that sees itself as a norm-sender, norm-shaper and as a South American superpower. Some elite interviewees perceive the EU as showing a lack of interest to accommodate demands from Brazilian partners and to hear their views. The group interview showed that younger generations also tend to be critical of the perceived EU sense of superiority and arrogance. Media analysis and some interviews revealed that Europe is still frequently associated with domination and exploitation, due to its colonial past. Democracy, development, technology, innovation and environment remain topics of some contention.

- Identify and map the local interpretation of 'assertive' behaviour, beware of the perception of arrogance on the EU side.
- Engage into honest dialogue, initiated by top experts and politicians from the EU, on equal footing (not top-down), demonstrating sincere listening.
- Initiate, join or engage in the dialogue especially in areas of common interest, such as economy and trade, as well as global challenges, environment protection and climate change.

Consult local partners when designing public outreach programmes

In some areas of collaboration that come with EU support, the framework of EU tenders was seen by local elites as mechanical, bureaucratic, overly complex and obsessed with measurable results even in areas where this is not possible or recommended. EU programmes are sometimes seen to be wasted on initiatives that bear little effects and the perception among some elites was that many of EU –supported projects are designed with a rationale 'one size fits all'. Many EU initiatives remain not well-known, although their visibility has improved since the strategic partnership was established in 2007. Yet Brazil is no longer eligible to receive funding from the Horizon 2020 programme, which hinders bilateral cooperation in science and technology.

- Public Diplomacy would gain from extensive consultation with the local experts when designing outreach programmes. At the moment many projects depend on individual/personal points of contact and thus one possible solution is to prioritise inter-institutional collaboration and collaboration among experts.
- Stakeholders see the EU Delegation as an active actor improving visibility of EU initiatives. Information dissemination activities by the EU Delegation must be supported and boosted.

CANADA

Capitalise on the overall positive perception of the EU to produce messages that are tailored to the local context

The general public has a positive view of the EU and provides a positive assessment of Canada's relationship with the EU. Interestingly, in the public opinion survey, the EU led in the use of the adjective united, and was behind only Japan in being described as peaceful and trustworthy. Such perception was also noticeable among the elite interviewees who recognised the EU as a peace project and a progressive model, warranting prosperity for its citizens. The EU was also seen as an entity with considerable power and potential, and even as a fascinating experiment. Importantly, the likelihood of respondents having a positive overall view towards the EU was lower for respondents of a higher age. Respondents in their twenties were around one-and-a-half times more likely to have an overall positive view of the EU as compared with the oldest respondents.

- Provide targeted information, both news as well as official material that is tailored to specific audiences. Reach out to ordinary citizens and grass-roots organisations by using social media and other relevant channels. Extend the partner networks geographically.
- Engage with actors that work with the EU and (potential) partner organisations from central government institutions to provincial governments, local municipalities, business associations, local populations in Northern territories, etc. (for the list of partners see Chapter 4).

Engage in joint Public Diplomacy efforts with the Member States

Elites also demonstrated the tendency to use different European states by way of comparison, emulation and inspiration: trade (UK, France, Germany, Italy), maritime trade (Netherlands), energy sector (Netherlands), news coverage (London and Paris), culture (France, Italy). Elites try to find inspiration from particular public policies in specific European countries, for example: how France or Belgium are having a particularly successful healthcare system, how the UK is performing well in terms of job market flexibility, etc. One interview has highlighted that most European cultural affairs institutes based in Canada remain too focused on bilateral initiatives, apart from the Goethe Institut, which promotes European activities and could serve as a model to emulate.

- Reinforce the outreach of EU Public Diplomacy by partnering with programmes implemented by the Member States. Engage into information exchange between various Public Diplomacy programmes, learn from experience, coordinate the messages, and pool resources.
- EU Public Diplomacy could use European countries as first points of reference/ entry in the EU-led dialogue with Canada. Bilateral public and cultural diplomacy initiatives would benefit from adding a European dimension.

Support the development and maintenance of personal links between Canadian elites and Europe

Canadian perceptions were strongly influenced by visions of historical, linguistic and cultural links to Europe and a shared feeling of 'cultural affiliation' and 'cultural affinity'. Elites

reported that culturally Canadians and Europeans understand each other with Canadian culture being influenced by Europe in major ways. Elites stressed the importance of personal/family ties with Europe (ethnic origin, studies, or travels) that contribute to shaping perceptions. Studying in Europe (especially, countries with the strongest cultural and linguistic connections) is still very attractive for Canadian students.

- Public Diplomacy initiatives should continue targeting Canadian elites, expanding their personal links to the EU through various actions that would bring them to Europe/ EU (e.g. field trips for leading bankers, or Parliamentarians, or media personalities).
- Promote educational exchanges of students and professionals. Increase education opportunities for Canadian students on the tertiary level targeting future national elites. Reaching out to youth organisations and government-sponsored initiatives (e.g. International Experience Canada). Support networking of people returning from exchanges in Europe.

Support diversification of news sources on the EU and Europe

There is an obvious influence of Anglo-Saxon media (from the UK and the US) on framing the EU in the media (noticeably, La Presse used French sources of news). The Eurosceptic tone of British press has a certain influence on Canadian journalists and the population. The next 18 months of Brexit news will be a high strategic risk for EU PD in Canada because of the media reliance on UK sources.

The media's extensive focus on critical EU issues (such as Grexit and Brexit, Greek economy, economic and migration crises, right-wing extremism in Europe) feeds back into local perceptions of local stakeholders and could also affect perceptions of the general public who learn about the EU from the media. Today's media coverage in Canada (and elsewhere) is about stories and people rather than institutions and events. This is challenging for the EU and the EU remains a hard topic to sell.

- EU Public Diplomacy could propose realistic avenues to diversify news sources and develop a set of media outreach activities.
- EU Public Diplomacy in Canada should convey the message that the EU remains a sustainable model.
- EU Public Diplomacy should aim to recalibrate communication to the sectorial level of Canadian economy or the local/ grass root level targeting particular groups and populations.

Engage into open discussion concerning norms and values

Additional challenges for EU Public Diplomacy are presented by the visions that the EU is too defensive. It has a complex structure of rules and regulations. Decisions take too long and Brussels is perceived to be too detached from reality. In terms of normative profiles, the EU/ Europe is often recognised as an ambitious message sender, but sometimes there is a gap with the practice. Sometimes, the EU is seen as disregarding its normative principles (e.g. in its economic relations with China). Other times, it is felt that the EU's discourse is more opportunistic than actually normative (e.g. in the area of environment, where the EU's economy does not rely on the production of natural resources, which makes a pro-environment discourse easier). Importantly, Canada is also highly dependent on the US for its economy, and in terms of

foreign policy and strategic culture. It has always juggled between 'Continentalism' – getting closer to the US – and 'Atlanticism', with an eye towards Europe.

- EU Public Diplomacy should engage in open discussions on norms, values and EU's aspirations in the international scene with academia, think tanks and media. Norms related to the environment should be a particular issue of concern, as it relates to the Canadian economic model (importance of natural resources) and geography (coasts and the Arctic).

Enhance visibility of research, science and technology projects

Europe is not visible enough in the RS&T area. The plethora of Canada-Europe cooperation in this field was not visible in the media, public or elite views. RS&T is probably the domain where there is the most potential for immediate valorisation of on-going, yet not visible, Canada-Europe partnerships, even more so given that it is a policy area that is very positively valued by public opinions.

- EU Public Diplomacy can look into various strategies on how best to raise visibility in this area as a true mutually beneficial collaboration – a mark of successful Public Diplomacy – is already taking place through RS&T projects. As a first step, EU PD could join forces with the recently created ERA-Can+ network¹¹, a network of European research science foundations and Canadian institutions, which attempts to promote joint Canada-EU research and innovation cooperation in relation with the Horizon 2020 programme.

Make the EU relevant at the local level

Apparently there is a general lack of interest in Canada for international news. Local newsmakers report mostly local events and actors. This stress of local is a significant trend observed not only in the media production but also in school programmes (secondary and high schools). The interviewed elites believed that the public had a general lack of knowledge and awareness of the EU and is usually confused. The general population still thinks about the EU in terms of states and does not quite understand the distinction between the EU's supranational architecture and EU Member States.

- Undertake direct communication initiatives in areas and on topics that resonate most with the Canadian society.

Develop region-specific outreach strategies

Canada is a federal state where decentralisation is strong and on-going. There are differences from one province to another that will influence image and perceptions of international counterparts (including the EU). Images of the EU and Europe are region specific: in Eastern and Central Canada – Atlantic Provinces, Quebec, Ontario there is a perception of a closer relation to Europe (the themes of the old country, the family, etc.). This is less the case in Western Canada. The Quebec province – because of its own language, history and culture – often perceives the EU/ Europe differently than the rest of Canada. There is also a noted lack of

¹¹ <http://www.era-can.net/>

EU presence in major cities except of Ottawa. Yet in matters like culture, Canadian metropolises tend to have an increasingly bigger influence and decision-making power.

EU coherence remains a debated topic in the context of crises in the media and among elites: some see it as having made progress, e.g. in the field of trade, others are much more sceptical and highlight inconsistencies between the EU and different Member States. However Canada – a federal state – can relate to this challenge, as the EU/ Member States possible inconsistencies echo the ambiguous division of competencies that can sometimes be found between the Canadian federation and provinces.

- EU Public Diplomacy could leverage Canadian federalism to shape its message about European integration in the language and concepts familiar to Canadians, drawing parallels with local political realities (see the list of potential partners in Chapter 4).
- Local elites also stressed one key area – the Arctic – where the EU has an opportunity to reach out to local populations in the Northern territories (e.g. hunters and trappers organisations, NGOs and members of the Assembly of First Nations). EU restrictions to trade of local seal products remains a contentious issue within the populations of these Northern territories.
- EU Public Diplomacy could recalibrate communication to the sectorial level of Canadian economy or the local/ grass root level targeting particular groups and populations.

Use CETA to increase EU visibility

CETA – a major achievement between the EU and Canada – has put the EU in sharper focus for media and as well as for some people in business, think tanks, academia, but not so much for the general public, as it is the case for most multilateral trade negotiations. Overall, CETA elicited positive views from media and elites – not last due to the perception that the EU and Canada have similar economic, political and cultural characteristics. Some concerns remain with regard to declining standards (e.g. dairy market in Quebec and Ontario, public procurement). Importantly, EU Public Diplomacy should also make sure that CETA will not suffer from the spill-over effects of the TPP negotiations (Trans-Pacific Partnership), which raises more controversies in the Canadian public opinion.

- Use the CETA framework to boost EU visibility among various elites and civil society/ general public and regarding different topics ranging from economy to security cooperation.
- More can be done by the EU at provincial level within the context of CETA implementation (e.g. the EU could strike dialogues with Premiers, the Councils of the Federation, etc. to address issues of public procurement, healthcare, infrastructure investments).

Engage with business companies and organisations

The perceptions of the EU will differ between businesses engaged in different sectors of economic activities as well as different types of business (large corporations vs. small and medium business). The large corporations typically have their networks in Europe and possess good EU awareness. The small and medium sized businesses account for most of the Canadian economy but have little EU knowledge and not enough resources to become fully involved. They are generally interested in engaging with the EU; however, one of the main perceptions of small

and medium businesses in Canada is that it is hard to enter the European market. Europe/ the EU is perceived as having many regulations and technical barriers which imply certification procedures and costs that are far beyond the human and financial capabilities of most companies. Business people on all levels also complain about strict European immigration rules for temporary stays that restrict business people's mobility.

- Develop mechanisms to talk directly to corporations in order to address different business areas and emulate successful initiatives. In the eyes of local stakeholders, potential partners for the EU could be sector-based industry associations (e.g. wood industry, automobile industry and others), CFIB (Canadian Federation of Independent Business) and others. The EU PD could strengthen its dialogue with the network of Trade Commissioners, who serve as a voice and source of expertise for these small and medium-sized companies in different sectors.
- For business profile, EU presence should be visible not only in Toronto, but Ottawa, Montreal, Vancouver and Calgary, that is, the main location where European investments in Canada are made.
- In the area of trade, apart from Toronto and Montreal, European countries have limited resources in major Canadian cities (e.g. chambers of commerce). EU PD should nonetheless rely on these chambers of commerce (e.g. Vancouver offices of Italian or UK chambers of commerce and Eastern Canada offices of French chamber of commerce) and pursue dialogue with provincial Canadian chambers of commerce (e.g. Alberta, Quebec, Ontario or BC chambers of commerce). A fruitful example of such collaboration was the set of CETA-related conferences organised by the Italian chamber of commerce in Canada during the year 2014, with funding from a Jean Monnet programme.

CHINA

Offer first hand views from Europe

The public opinion survey respondents had an overall positive attitude towards the EU and China's relationship with the EU. Younger people tend to have a more positive view of the EU than older people. Yet a partly diluted coverage in the mainstream media of EU-China relations constrains the Chinese people's understanding of the EU. Lack of mutual empathy, different levels of development, cultural diversity, wrong or inaccurate translation, misunderstanding and mistrust add negative tones to the EU's images and perceptions. The EU's promotion of certain values concerning human rights and the rule of law as well as its policies on arms embargo, denial of China's market economy status or even what's perceived as earlier/ historical 'humiliations', shape Chinese perceptions in a negative way. The media tends to provide critical assessments of Greek debt crisis, integration of refugees and EU's role in Ukrainian crisis.

- Use a variety of channels (including traditional media, social media, radio) to offer first hand views from Europe (feature European commentators/ interviewees) in languages used in Chinese regions. In particular, more creative online content must be developed and distributed as this is the most effective way to reach Chinese general public.
- Reach out to the youth, universities and think tanks, labour unions, civil rights NGOs, and other (potential) partners. The key target group for EU Public Diplomacy

outreach is the young Chinese educated middle class (see Chapter 4 for more information).

- Increase mutual understanding between China and the EU through cultural exchange and people-to-people's dialogue.
- Any interactions should depart from Euro-centric positions and be designed with a conscious effort to listen to alternative positions and not to impose/ preach at the Chinese counterparts. The 'top-down' normative dialogue should be avoided.

Engage with the media to reach out to the wider society

The Chinese news media heavily relies on local newsmakers and news sources when reporting the EU and Europe. Several areas where the EU could raise its profile (environment, energy, and the fight against climate change, education) have been under-reported in the Chinese influential media. Yet the political context that restricts media and NGO activity is an important overarching factor.

- Develop a multi-level outreach programme to local journalists and gatekeepers. Initiate a joint training programme to train Chinese Europe-focused newsmakers in Europe and in exchange to train European China-focused newsmakers in China.

Focus Public Diplomacy on areas that resonate with Chinese public and elites

Firstly, cultural programmes initiated by both the EU as well as EU Member States impact positively on images and perceptions of the EU and wider Europe. A significant share of Europe's positive coverage in the media referred to European culture (film, cuisine, architecture) and Europe as a tourist destination. Secondly, Europe was also reported as a desirable destination for Chinese investments. Trade also generates interest and consent. Both elites and the public share the view that the EU is an important partner in science, research and technology. Finally, research demonstrates that the most fertile areas for normative dialogue could be protection of the environment, human health, clean energy and the fight against climate change.

- Devise outreach programmes in the above fields to inform on the EU's advances while also drawing explicit parallels to the Chinese conditions and circumstances. Work to improve public visibility of joint EU-China projects and initiatives, first and foremost in the media.

Encourage the development of personal links to the EU and Europe

First-hand knowledge and personal experience are important factors defining the perception of the EU and its policies, especially among the younger generations. Education and training, as well as tourism shape young persons' perceptions of the EU and its policies.

- Expand student exchange programmes between China and the EU. Provide focused information to college students in China about educational programmes in the EU (admittedly, these student will be overwhelmingly looking for English language exchanges) and funding opportunities (e.g. Erasmus), frame education in the EU as viable alternative to the US. Support networking initiatives of students who have returned from the EU.

- Integrate the educational exchange programmes in Europe (e.g. Erasmus) into the university application process (following on example of some Member States – e.g. the Eiffel scholarship of France).
- Consider making the EU visa policy more flexible (as in the US), in order to facilitate people exchanges.

Engage with academics, experts, professionals

Academics and think tanks should be targeted by the EU PD as a group playing a key role in shaping the EU's image among the Chinese, both policy makers and the general public.

- Target research, science and technology as a key area of outreach towards academics, experts and professionals. Support dialogue and professional exchanges in various fields to sensitise Chinese professionals on a range of topics which are instrumental for successful EU Public Diplomacy. Undertake dialogues where both sides have an opportunity to voice their positions, listen to each other and try to understand each other without imposing views. Support and participate in the networking of Chinese academics conducting EU-related research.
- Encourage Chinese academics, experts and professionals to speak out in Chinese media, both traditional and new, to discuss China's engagement with the EU and its Member States.

INDIA

Capitalise on the overall positive towards Europe and the EU

In the survey the EU was generally viewed positively (although less so than the USA and Japan). The EU was most commonly described as modern, strong, efficient and peaceful. It seems that the current discourse has transcended the perception of colonialism – yet it is still a factor when EU is discussed in relation to individual countries, first and foremost, the UK or France.

- The positive image among the general public presents an opportunity for EU Public Diplomacy to reach wider groups within Indian society.
- Provide targeted information, both news as well as official material, in local languages (first of all Hindi and Malayalam, also Telugu, Tamil, Bengali and Gujarati).
- Target the key authors of blogs on foreign policy.
- Use high-level visits to shape a powerful and present image of the EU.

Increase the visibility of the EU by addressing issues with high local resonance

The overall coverage of the EU and Europe in the media is quite modest. The EU is visible when it comes to peace dialogues and regional dialogues but not very visible when India-Pakistan relations are discussed. Indian experts considered that India could learn a great deal from EU concerning environment, climate change, renewable energy, technological development.

- Provide an 'India angle' when communicating news and views from the EU.
- Undertake direct communication initiatives in areas that resonate most with Indian society and elites.

Reach out to different groups in the society to improve their understanding of the EU

India is more aware of the cultures of individual EU Member States rather than of any 'European' culture. The idea of the EU as a political entity is not clearly understood. Yet the business community, academia and people with high level of education are much better informed as compared with other groups.

- Leverage the informal federal structure of EU vis-à-vis India to explain the essence of the EU.
- Engage with regional leaders and elites.
- Counter the traditional state-centric view of international politics with the message that non-state entities like the EU also play a major role.
- Undertake joint Public Diplomacy initiatives with the Member States.

Engage in dialogue and mutual learning on migration and multi-culturalism

EU is seen as divided when dealing with illegal migration and the overall assessment of the EU's approach is negative. Interviews drew attention to the perception of growing Islamophobia in Europe.

- Initiate meaningful dialogues with India concerning migration, multiculturalism and minorities; involve organisations like the National Rights for People Movement.

Engage in educational and research exchanges

India's public opinion sees the EU Member States as attractive for their culture and lifestyle. Although education in the EU was rarely mentioned in the media, and the general public was often unaware of programmes such as Erasmus, the survey confirmed a broad interest in educational initiatives. The Indian public is impressed with the level of education of Europe's population, an area of social development where the EU is seen as top level performer. Consequently, the EU is also seen as an important partner for India's educational exchanges.

- Support the exchanges of the youth, students and teachers – from India to the EU and vice versa, at various levels of the educational system. Increase the popular awareness of the Erasmus programme and other relevant programmes. Support networking among those returning to India from education exchanges with the EU.
- Engage think tanks and universities to undertake research on subjects of mutual interest to enhance better understanding between India and the EU. Increase awareness among relevant groups concerning grants for Jean Monnet Chairs and Jean Monnet modules.

JAPAN

Draw on the overall positive perception of Europe and the EU to provide messages tailored to the key audiences

The EU is viewed more positively by the general public than most of the other states and organisations used for comparison. The EU is frequently perceived as multicultural and modern and the EU's leadership in world affairs is seen as desirable. The EU is viewed as performing fairly well in social justice, solidarity, public welfare, and overall quality of life. There is a positive attitude to European culture (arts, historical heritage, etc.) and Europe is also seen as

an attractive tourist destination. The level of understanding concerning the EU and Europe differs depending on age, education and other characteristics. Older respondents were more likely to see an active role of the EU in international affairs as likely. They also saw the relationship between the EU and Japan in a more positive light.

- Engage with (potential) partner organisations as presented in Chapter 4: media, universities, think tanks, civil society and human rights groups, SME organisations. Target the youth and reach out to the ordinary citizens and grass-roots organisations by using traditional media, social media and other relevant channels. Extend the partner networks geographically to areas outside Tokyo and other bigger cities.

Sensitise local media and the public to long-term initiatives of the EU

Despite the generally positive attitude of the general public, its knowledge and understanding of the EU remains low – except for a small circle of officials, experts and business people who work on Europe on a daily basis. While the EU and Europe were mentioned relatively frequently in the media, they were typically treated as minor subjects and assessed neutrally. In the media, economy and politics are first and foremost associated with the EU, whereas culture, sports and science is firstly associated with Europe. This means that in Japan the EU is mostly seen as an economic and political union. A large majority of EU articles in the three newspapers selected for analysis were written by their own correspondents stationed in Europe. The EU is hardly visible in the media in areas such as energy, science, innovation, technology, education and international development.

- While media tends to focus on the short-term events and crises, provide accessible information on the EU's long term initiatives and engage in discussion with stakeholders. Frame messages in a way that is relevant to the Japanese context. Engage in dialogue with the media, reach out to Japanese journalists working on European themes.

Provide first-hand accounts on high resonance issues

The EU's approach towards refugees and displaced people received a relatively negative assessment in the media, in the public opinion poll and among the interviewees. There are some concerns among the elites about the EU's priorities in Asia and perceived 'softness' towards China. Interview material shows that sometimes the EU is seen as inflexible and imposing its own rules, for example in business and international trade (e.g. in the context of FTA negotiation). Finally, environment, climate change and COP21 seem to resonate in the Japanese context: the EU is recognised as one of the leaders but its effectiveness has been questioned.

- Communicate directly the views, opinions and policies from the EU on these issues in Japanese language. Engage in dialogue, undertake joint initiatives with people shaping public opinion. The goal is not to conceal problems and difficulties, but to address stereotypes and improve the understanding of Europe.

Coordinate closely Public Diplomacy efforts with the Member States

In the media, EU Member States and their political leaders appear more often in the EU articles than EU institutions or EU leaders. Several countries (e.g. France, the UK) are actively engaged in public, cultural and economic diplomacy.

- Reinforce the outreach of EU Public Diplomacy by partnering with programmes implemented by the Member States. Engage into information exchange between various Public Diplomacy programmes, learn from experience, coordinate the messages, and pool resources.

Engage with the youth, students and researchers

Elites were informed and supportive of EU and Member States' education programmes in Japan, often calling for more youth exchange programmes – yet also emphasising the need to evaluate their implementation and effectiveness. Academic initiatives frequently surfaced in the interviews, with interviewees referring to successful initiatives, research projects, seminars.

- Support the exchanges of the youth, students and teachers – from Japan to the EU and *vice versa*, at various levels of the educational system. Increase the general awareness of the Erasmus programme.
- Support networking among those returning to Japan from education exchanges with the EU. Support networking of Japanese academics conducting EU-related research.

MEXICO

Engage into a stratified dialogue to capitalise on what is positive in the perception of the EU

The general public is not well informed about the EU, yet it perceives Europe, its welfare model, way of life and culture as quite attractive. In the public opinion survey Mexico's relationship with the EU was assessed positively and EU/ Europe was seen as a desirable attractive tourist destination. In the media the EU's image is positive on human rights, good governance, negotiations with Iran, and EU-Mexico relations. The interviewed elites regard the EU as a promoter of values such as security, peace, democracy, rule of law, freedom of speech and human rights. They perceive the EU as a successful geopolitical experiment to create unity in diversity, in contrast to attempts of regional integration in Latin America. Some groups are quite well informed about EU, for example business groups, trade unions, academia, and political parties.

- Engage with (potential) partner organisations and audiences as presented in Chapter 4, such as Commissions for External Relations of the Mexican Senate and of the Chamber of Deputies, academia, think tanks, media and students by using relevant channels, including networking, media event, social media, dialogues, seminars, projects, cultural initiatives, competitions, etc. Broaden the scope of the partner organisations, especially those representing civil society and academia.

Engage specifically with the media to reach out to the wider society

The overall evaluation of the EU in the Mexican media was between neutral and negative, with 'La Jornada' being the most critical. The media outlets analysed in the study relied heavily on local-correspondents or local sources – thus the images of the EU and Europe reflected Mexican views rather than those of international news agencies.

- Design and undertake a pro-active outreach towards the newsmakers delivering newsworthy information about diverse facets of EU-Mexican collaboration (see also the general set of media recommendations).
- While the presence of Televisa and TV Azteca is dominant in Mexican media and both networks should continue in the priority list of PD, it is pertinent to reach out to a larger audience that consumes information from morning, noon and early night radio shows in other networks (Multivision or Canal 22, for instance) or from online media, particularly from newspapers that have launched 24-hours online TV news services (Milenio and El Financiero).

Work with the Member States to extend the outreach and effectiveness of Public Diplomacy

In the media the EU is associated with Brussels and its institutions, but frequently the EU is also associated with its Member States. In business the most visible connection between Mexico and the EU comes through Spanish companies and banks such as OHL, Santander and BBVA. The general population saw France, Italy, Spain and Germany as the most attractive Member States with East European countries being perceived as less attractive. The EU Delegation in Mexico is among the few having established a specific Public Diplomacy strategy in coordination with EU Member States.

- Reinforce the outreach of EU Public Diplomacy by partnering with programmes implemented by the Member States, engage into information exchange between various Public Diplomacy programmes, learn from experience, coordinate the messages, and pool resources.
- Cooperate with embassies of CEE to increase public recognition of these countries in Mexico.
- Cooperate with European foundations currently working with political parties and NGOs in Mexico (for example, Friedrich Ebert Foundation or Konrad Adenauer Foundation).

Make civil society and human rights a focal point of Public Diplomacy

The normative frame is more visible in Mexican media than in other Strategic Partner countries (both the EU and Europe datasets). The EU is a normative point of reference for Mexico in the fields of human rights, freedom of speech as these themes resonate with the society and the elites due to the organised crime and drug wars. Good governance is also an important theme in the context of negotiations to renew the Cooperation Agreement between Mexico and the EU. The public survey respondents evaluated the EU's performance in gender equality as the most positive among other human rights-related issues listed in this survey question. The EU Delegation is working to reach out to Mexican indigenous peoples.

- Engage in a dialogue with Mexican civil society and help it to exchange advice and receive support from counterparts in Europe.
- EU Public Diplomacy has found in Mexican NGOs active partners, particularly in areas where the EU is financing programmes. Priorities of Mexican society have been changing and thus the focus of cooperation should be adapted accordingly. Rule of law, reduction of crime and corruption, and inclusion are three potential themes for Public Diplomacy.

Provide first-hand account of European views concerning high resonance issues

There is a feeling of resentment and exclusion among Mexican elites concerning the TTIP negotiations between the EU and the US. Meanwhile the general public, media and the elites also see the EU as weakened by economic crises, threatened by Grexit and Brexit and ineffective in addressing the migrant crisis.

- Communicate directly the views, opinions and policies from the EU on these issues. Engage in dialogue, undertake joint initiatives with people shaping the public opinion. The goal is not to conceal problems and difficulties, but to address stereotypes and improve the understanding of Europe.

Sensitise local media and the public to long-term initiatives of the EU

In the media, the overall coverage of the EU and Europe is moderate and in-depth articles on the EU and Europe are rare. Politics, economy and society dominate reporting with little coverage of development, energy, environment, and research, science and technology. There is a perception that the US and China are more active and effective in Mexico. Long-term initiatives and projects of the EU in Mexico receive little visibility and are known only in the specialist circles. The shift of classical development cooperation towards less visible cooperation fields has led to weakened visibility for the EU.

- Provide accessible information on the EU's long term initiatives, engage in discussion with stakeholders. Frame messages in a way that is relevant to the Mexican context. Engage in dialogue with the media, reach out to Mexican journalists working on European themes.

Engage with Mexican states and cities

At the state level, Mexico, Oaxaca and Jalisco, among others, have opened offices focusing on developing external relations. Also, some cities have developed policies and programmes oriented to enhance cooperation. The Mexico City External Relations Office is of particular importance, but also similar offices in other cities or large municipalities such as Cancun or Acapulco are quite willing to understand European issues and work to attract more European tourists.

- Undertake direct communication initiatives in areas and on topics that resonate most at the local level.

Engage with the youth, students and researchers

Mexican respondents view the EU positively in terms of its level of education, which is considered as one of its major achievements. Europe is an attractive destination for student and teacher exchanges. Yet the general public has little awareness of the Erasmus programme.

- Support the exchanges of the youth, students and teachers – from Mexico to the EU and *vice versa*, at various levels of the educational system. Increase the general awareness of the Erasmus programme and other relevant programmes. Support networking among those returning to Mexico from education exchanges with the EU.
- The study of the European Union has exponentially grown in Mexico due to the fact that a large number of academic institutions offer BA degrees in International

Relations, not only in Mexico City, but also in other cities such as Guadalajara, Monterrey, Tijuana or Chetumal. Youth studying in these programmes have a particular interest in developing first hand contact with European diplomats.

- At the professional level, the Mexican Council on Foreign Relations (COMEXI) and the Mexican International Studies Association (AMEI) are natural interlocutors of the EU's Public Diplomacy. Support and participate in networking of Mexican academics conducting EU-related research.

RUSSIA

Provide first hand channel of EU views and values

Due to the conflict in Ukraine and the imposition of economic sanctions, there was a radical shift of media messages and public opinion towards the negative. The general public most commonly describes the EU as hypocritical, multicultural and arrogant. Older respondents tend to have a more positive opinion about the performance of the EU and a more positive view towards the culture and lifestyle of EU countries. Russian influential media features the EU with clearly visible sarcasm and criticism. The EU's handling of the migration crisis is broadly addressed in the media, and both media and public opinion agree that it is being handled badly. Europe is commonly perceived as getting older, steadily losing its economic potential, in contrast to the new emerging powers.

- Use e-diplomacy and other channels to provide directly the EU's views on the most recent developments, including the migration crisis.
- Engage with (potential) partner organisations from media, youth, academia, business associations, civil society, etc. (see Chapter 4).

Coordinate closely Public Diplomacy efforts with the Member States

Russian experts seem to relate easier to the Member States than EU programmes. For Russia, individual EU Member States are essentially more important than the EU as a whole: for economic relations, Germany, France, Spain and Italy are the most relevant partners. In cultural relations, France, Italy, Spain, Germany, and the UK are the most appealing while in terms of education, the UK, France and Germany are considered the most attractive. The Swedish, German, French, UK embassies are very actively communicating with the Russian expert community.

- Reinforce the outreach of EU Public Diplomacy by partnering with programmes implemented by the Member States, engage into information exchange between various Public Diplomacy programmes, learn from experience, coordinate the messages, and pool resources.

Engage with experts and professionals in various fields

Experts and professionals usually appreciate first-hand experiences of the EU and argue that these contacts are critical for 'quiet diffusion' of norms and values. Yet the current political context nurtures suspicion, cynicism and distrust. Interviewees reported that both sides are not willing to listen to each other.

- Continue active outreach and support dialogue with experts and professionals such as the business community, media, academia, think tanks and civil society, in various fields.
- Undertake normative dialogues where all sides have an opportunity to voice their positions, listen to each other and try to understand each other without imposing views.
- Undertake dialogues that emphasise intersecting historical paths between Russia and Europe.
- Encourage exchanges of professionals with the Member States to sensitise Russian experts on a range of topics which are instrumental for successful EU Public Diplomacy.

Support educational exchanges between Russia and the EU

While the education frame had no visibility in the media and knowledge of the general public on specific programmes is low, elites consider the EU as a desirable study destination. Overall education or science are considered by the elites as relatively less sensitive (political) areas. Accordingly, it is easier to engage in these fields.

- Encourage student and teacher exchanges – from Russia to the EU and *vice versa*.
- Support educational exchanges on various levels of the educational system (tertiary and secondary, both students and teachers).
- Support communication, networking among those returning to Russia from education exchanges with the EU.

Use a diversified approach when identifying and working with partner organisations

There are two broad groups of organisations to engage with: those who are close to the government, or can be seen as organisations that understand the government's position and those who are close to the EU and support its values. Some among the elite interviewees argue that the EU is not ready to listen to Russia, or it listens just to its 'clients', i.e. people and organisations who support European ideals.

- Establish contacts to organisations that are relatively close to government (such as Moscow State Institute of International Relations) in order to communicate the position of the EU directly.
- Engage with organisations that genuinely have the same values through joint projects, activities, exchanges, cultural initiatives.
- In current situation an effort should be put into emphasising that EU engages in dialogue with society because this is how it works universally, not only in Russia and that it is not aimed to undermine the position of the state.

Be open to grass-roots input into the EU-funded projects

The interviewed experts noted a lack of flexibility on the part of the EU in designing outreach programmes. For example, a series of programmes that were well received in the early nineties, now seem inadequate in modern-day Russia.

- Involve local organisations into the design and re-assessment of the collaboration programmes to ensure that local voices are listened to.

Undertake a regional approach

Some regions close to Europe (Kaliningrad, Karelia, St. Petersburg) could be more open for contacts with the EU. Local/urban development issues attract interest on the Russian side.

- Engage with partner organisations in selected regions through exchange of expertise on local/urban development, urban renewal, environmental initiatives.

SOUTH AFRICA

Address the communication deficit

South Africans are relatively unaware of the EU's presence and its work in the country. The highly fragmented language landscape of South Africa means that most citizens, especially in the rural areas, do not engage with the English language media. To the extent there is awareness of Europe and the EU, the overall perception is mixed. The public most commonly described the EU as strong, modern and multicultural. Media interest in reporting the EU's development activities was close to zero. In the study, cultural connections were identified as a potential positive factor in strengthening the relations between South Africans and Europeans.

- A concerted and targeted approach to the mass media (especially the radio, including in local languages) is fundamental to creating better awareness of the EU in South Africa.
- In its communication activities the EU should focus on few key areas and thus build visibility through niche interventions.
- Public Diplomacy in South Africa must continuously address the fact that Europe is not a colonial, oppressive power anymore (especially by emphasising the role of new EU members, which are not associated with Western Europe)
- Cultural activities provide a good platform to inform specific target groups as well as the general public.

Engage with the local elites while being aware of historical sensitivities

The main perception of the EU and Europe was one of appreciation as well as caution. The history of colonialism makes South Africa's political elites wary of European motives. Some elites regard the EU and its representatives as arrogant and disparaging. There is a perception that South Africa is no longer a priority for the EU in terms of aid and bilateral relations. At the same time South Africa is experiencing a surge of Afrocentrism. Elites that had the chance to study in the EU are seen as having socially a more positive perception of the EU due to their time living and interaction with the EU.

- When engaging with partners from South Africa, beware of the perception of arrogance on the EU side.
- Initiate and engage with networks of (former) students who returned from the EU countries.

Engage with European diasporas as a resource for Public Diplomacy

There are large Greek and Portuguese communities in South Africa, creating linkages with the European continent and generating a degree of interest in the news from that part of the world

– most of which was rather unfavourable in 2015. There are also a number of EU citizens working in South Africa as academics, journalists, entrepreneurs and the like.

- Involve European diasporas in South Africa thorough outreach and dialogue as well as cultural activities.
- The EU should connect with their work of EU citizens in South Africa (academics, journalists, entrepreneurs) to highlight the diverse contributions they makes to SA's sustainable long-term development.

Partner with local actors working on local economic development in order to make the EU more relevant

The EU was often criticised for being condescending in its approach instead of partnering with local actors to achieve change. Many complaints followed a common theme – the EU's prescriptive approach, a lack of confidence in South Africa as a competent partner in solving problems, reluctance to consult South African professionals, and that projects are funded that suit the EU and are not always coordinated with local initiatives. As a regional leader and a middle-income country, South Africa is less interested in development aid and more keen to engage with the EU on an equal footing.

- Critical partners for EU's Public Diplomacy in South Africa should include grassroots NGOs working on local economic development.
- Those projects with which the EU engages should be informed from the grass-roots and not top-down: showing compassion, instead of obligation and becoming engaged, instead of prescribing.
- The EU needs to move beyond being just a funding entity and become more engaged with South African projects that address the core needs of the people.

Draw on the history of cooperative welfare and engage with local cooperatives

One of the EU's comparative advantages is its long history of cooperative welfare and high living standards.

- The EU should focus more on supporting local SA cooperatives (also facilitating partnerships between European groups and their SA equivalents) in fields as varied as organic farming, renewable energy production and environmental sustainability.
- A key partner in this area would be the South African Organic Sector Organisation (SAOSO), which works at the intersection between environmental policy, food production and land reform (three critical issues in South Africa), and the South African National Apex Cooperative.
- The EU has much to gain from interacting with SA's small business groups, thus building on Europe's long tradition of local level economic activities. In this regard, the National Small Business Chamber would be a valuable interlocutor.

Support social innovation and social enterprises

Social enterprises are mushrooming across SA, with major potential impacts on the country's development trajectory.

- The EU should support social innovation platforms, incubators of promising initiatives and opportunities for social entrepreneurs to connect.

- Critical partners in this regard are universities (e.g. the Gordon Institute of Business Sciences, the Centre for the Study of Governance Innovation), but also hybrid formations like the Innovation Hub, JumpStarter (a social innovation network) as well as the Department of Economic Development.

Engage with think tanks and universities

Academic elites in general by virtue of their education are seen as viewing the EU in a positive light. Several research centres and think tanks focus on EU-Africa relations and are based in South Africa. A recently launched European Union Studies Association of Sub-Saharan Africa is based in Pretoria.

- Think tanks and universities are critical to help the EU strengthen its visibility and public image in the country. More involvement of EU officials in public debate, media discussions and other channels is to be welcomed. Also student associations can contribute, especially those focusing on regional governance issues, such as the African Union Student Alliance based at the University of Pretoria. A more extensive list of (potential) partner organisations is presented in Chapter 4.

SOUTH KOREA

Present first-hand views from the EU

In media and in the eyes of the general public and the elites, the visibility of the EU and Europe is relatively high while the overall image of the EU oscillates from positive to neutral. For the public and elites, economy is the most important area of cooperation, even though the EU is seen to not always take Korean needs into account. Older respondents were more likely to have a positive view on the EU's relationship with South Korea and more likely to see the EU's role in global affairs as desirable. The EU and its Member States are seen by the general public as particularly attractive for their culture and lifestyle. Travelling to Europe is very popular. Visibility of the migration crisis in media is high and EU's performance is not evaluated positively by the public. There are negative assessments concerning the state of the EU economy, Sovereign debt crisis and Brexit.

- Use a variety of channels, including digital media to present first-hand accounts of the current events in the EU.
- More outreach should be designed in Korean language to broaden the targeted audiences.
- The potential partner groups for the EU to develop more effective partnerships are: education institutions; think tanks; energy, environment, R&D organisations, KOTRA; diverse civil society organisations in the areas of labour, human rights and culture; European Union Chamber of Commerce in Korea; consulting companies or EU-expertise law firms; National Human Rights Commission of Korea; and Korea International Cooperation Agency and others (see Chapter 4).
- More emphasis should be put on pressing political issues generating high public interest, such as the conflict with North Korea.

Work with the Member States to extend the outreach and effectiveness of Public Diplomacy

Korea has good bilateral relations with EU Member States and thus embracing the Member State perspective would be an effective approach. The general public saw France, Germany and the UK as the most attractive Member States while Central and East European countries were least often mentioned as the most attractive.

- Reinforce the outreach of EU Public Diplomacy by partnering with programmes implemented by the Member States, engage into information exchange between various Public Diplomacy programmes, learn from experience, coordinate the messages, and pool resources.

Sensitise local media and the public to long-term initiatives of the EU

The media focuses on current events and crises while long term projects largely go unnoticed. For both the EU and Europe media datasets there was a great reliance on local journalists and international sources were rarely used. Economy is the most important and relevant area for Public Diplomacy – because it is the most visible in the media. An EU role in several themes is almost invisible in the media: development issues, environment, energy and education. The EU is neither seen as a political actor nor leader in international politics.

- Discuss the economic benefits of the FTA for Korea, address the public concerns.
- Make the existing cooperation programmes with Korea more visible in the Korean society by hosting workshops and seminars.
- Specific themes for potential dialogue and cooperation as revealed in the focus group discussion: energy, environment, bio-industry, medical device industry, pharmaceuticals, automotive industry, and investment banking.

Engage with students and researchers

While the EU's role in educational exchanges gets little visibility in the media, the general public and the elites see the EU as an important partner for education exchanges. Korea is well-known for a well-established network of scholars specialising on the European integration and EU affairs.

- The visibility of the EU can be enhanced through stronger educational cooperation. The ICI-ECP programme should be further expanded.
- Increase the general awareness of the Erasmus Mundus programme.
- Engage in cooperation with CAMPUS Asia (Collective Action for Mobility Program of University Students in Asia) programme, which was launched as an educational cooperation initiative between China, Japan and Korea.
- Take part in the ASEM-DUO Fellowship programme that has been established at Korea's initiative as an ASEM activity.
- Support and participate in the networking of Korean academics conducting EU-related research.

USA

Capitalise on the overall positive perception of the EU with customised messages aimed at specific audiences

The public opinion survey demonstrated that the EU is among the most positively viewed entities (below only the US itself and Japan). Comparing the EU to other international organisations, respondents evaluate the EU more positively than all other organisations except the UN and NATO. The EU and the US are most often described as multicultural. Elites reiterated this positive public perception: in their view, there is no serious challenges between the EU and US, and most US citizens have positive perceptions of the EU and the Member States. There always will be occasional political clashes but the consensus is that there are no real obstacles in the EU-US relations.

- The positive perceptions among the general public and elites constitute a promising base to continue and initiate a range of EU Public Diplomacy initiatives designed to resonate and amplify the positive outlooks within the US society.
- Engage with (potential) partner organisations and audiences such as government agencies, media, research institutions as presented in Chapter 4. Reach out to Latino/Hispanic community with messages in English as well as Spanish.
- Use high level visits to increase focus on EU foreign policy messages.
- Use social media and e-diplomacy, especially when reaching out to distant publics.
- Coordinate actions and undertake joint Public Diplomacy initiatives with the Member States.

Work with US-based NGOs active in third countries where the EU is addressing similar topics

US public opinion perceives the EU as an important and trustworthy partner for the US in international relations. The EU's leadership in world affairs is seen as desirable. However, the EU ranks behind the US and, to a lesser extent, China in terms of how respondents gauge the likelihood for a strong leadership role in the future.

- Cooperation with US-based NGOs in third countries would publicise EU policies within the United States and emphasise that the EU is already in partnership with the US tackling global or regional problems. For instance, the Carter Centre is conducting electoral observation missions in countries where the EU is also conducting observation.

Coordinate closely Public Diplomacy efforts with the Member States

In the public opinion poll the EU Member States were viewed as particularly attractive for their culture and lifestyle. US respondents also generally see Europe as an attractive tourist destination. Experts saw a division of roles between the EU and its Member States: the EU was seen as effective in shaping global competition and regulatory and competition policies and in international economy. Member States were seen as effective and efficient in particular issue-areas (e.g. the Scandinavians in economic development policies, Germany in energy policies). Often, consulates and embassies of individual Member States were seen as more active than the EU Delegation – a more coherent policy may change this assessment.

The EU Delegation's efforts in 2014 focused in particular on highlighting the positive aspects of transatlantic relations, especially in the course of the ambitious TTIP negotiations. In this context, the Delegation's press team chaired monthly meetings with EU Member States' Press Counsellors to coordinate key messages, exchange information and best practices as well as to develop a common outreach agenda.

- Reinforce the outreach of EU Public Diplomacy by partnering with programmes implemented by the Member States, engage into information exchange between various Public Diplomacy programmes, learn from experience, coordinate the messages, and pool resources.
- If EU-related offices were opened in various locations throughout the country, they could serve as focal points for 'EU diaspora' – US citizens who experienced living in the EU and who came back.

Target topics that are of high relevance to both the EU and the US

Aside from cultural differences, the US and EU/ European societies were recognised to be very similar: facing the problems of ageing society and ageing infrastructure. The US experts saw security concerns on the European continent to be very important for Americans.

Some EU policies that bear direct relevance to the US did attract some visibility in perceptions – for example, EU policies in trade, national security, agriculture, energy and especially environmental policies (including biotech). There is a pronounced interest among the elites towards EU actions when it develops and advocates green technologies, fights for environment protection, regulates pharmaceuticals and elaborates national security. The EU was occasionally seen to possess enough market power to send the US normative messages (especially in the area of environmental protection and climate change).

Some among the interviewed elites argued that the US world view is rather inward looking – meaning a low interest in the outside world, the EU/ Europe included. It potentially leads to a lower level of awareness about events and actors in the EU and to an exclusive use of the US as a base for comparison.

- EU Public Diplomacy could prioritise its outreach targeting the topics which are perceived in the US to be 'intersecting' with the EU, i.e. having relevance for both societies. Thus, the demographic situation, ageing society in the USA and the EU and social solutions, or security could be fruitful areas for such a dialogue. There is a demand for enhanced climate diplomacy.

Reach out to various audiences in the broader context of the negotiation of the Transatlantic Trade and Investment Partnership (TTIP)

TTIP will be in the EU-US agenda for several years, not only during the negotiation, but also during the potential ratification and implementation. Among the media articles selected for analysis, a few texts dealt with trade relations with the USA, first and foremost TTIP. Importantly, the question of trade with Europe emerged in the US press only when the US Congress granted Obama the fast-track process, suggesting an importance of a local 'hook' in raising visibility of external events and actors.

- A TTIP-related Public Diplomacy should focus on those sectors that have raised arguments in favour and against the TTIP, for example, food security (GMOs) or transparency. This would contribute to improving the visibility and understanding of EU policies.

Undertake a more pro-active position when communicating policies, initiatives, norms that receive little visibility in the US

There is little visibility in the media concerning EU actions in education, environment, research, science and technology, and the EU's on-going development aid to various parts of the world. The majority of the interviewees had difficulties mentioning a clear EU or Member State programme and/ or initiative in the US outside of the higher education sphere. Most of the interviewed elites had difficulties in formulating a spontaneous image of the EU.

- EU Public Diplomacy needs to address the information gap through better advertising, framing and advocating. Issue-areas that are perceived to be 'similar' in the US and the EU could be the first ones to initiate a more assertive profiling of the policies. Engage into a proactive outreach to the news making community in the US as presented in the general set of media recommendations.

Explain how Europe is tackling its challenges

EU immigration policy and the migration crisis were among the most reported topics in the selected media. Social coverage of the EU examined the emergence of radical political parties in the context of the challenged multiculturalism in the EU. Public opinion poll showed that in the United States the EU's dealing with refugees and displaced people was seen as less positive when compared with the overall fairly positive evaluation of the EU's performance in other fields. Among some interviewees, the dominant image in association with the EU was 'migrants on a boat'. Moreover, some of the interviewed elites shared their perception of the gradual economic decline of Europe which is also another popular media theme. Importantly, the elites thought that this economic deterioration, if not stopped, eventually will cause tensions between the two blocks. Furthermore, the EU was sometimes seen as a large and somewhat inefficient bureaucracy.

- EU Public Diplomacy may consider approaching key business and opinion-making experts – through a series of presentations/ meetings/ round tables with high-profile EU personalities/ leaders – delivering an expert assessment and report on how the EU is overcoming its economic crises.
- EU Public Diplomacy could produce various initiatives explaining the EU's challenges and approaches in areas such as energy, environment and foreign policy.

Diversify the geographical outreach

So far EU information dissemination has been more or less visible in the key cities on both coasts, leaving out the Midwest and interior of the country. At the state level, experts recognised potential interest in contacts with the EU (e.g. some states like Florida, Virginia and Iowa have their own trade policies). At the local level, governments were reported to be open for potential contacts with the EU. Elites specifically pointed out the importance of Public Diplomacy towards cities and municipalities. The sister-city programme received positive appreciation.

- EU Public Diplomacy could directly target the caucus of the governors of different US states for exchanges and initiatives as well as approach city mayors of the major urban hubs (e.g. Chicago, New York City, etc.).

Engage with the youth, students and researchers

Educational topics have a very low profile in the media reportage, while the general public acknowledged the importance of the EU in educational exchanges. US respondents viewed the EU positively in terms of the level of education of its population, which was seen as the area of social development where the EU performed best. For elites, Jean Monet Chairs in the USA and the network of the Jean Monnet EU Centres were seen of crucial importance: they were seen to be 'playing a very important role in promoting education about Europe, funding European projects, bringing people from across the spectrum to learn about Europe and to discuss Europe ... they have had a very significant role.' Their value is especially critical as 'there is not enough attention and education in the US about the EU and Europe.' Paradoxically, funding for the Centres of Excellence ceased in 2015.

- Support the exchanges of the youth, students and teachers – from the US to the EU and *vice versa*, at various levels of the educational system. Increase the popular awareness of the Erasmus programme.
- Support networking among those returning to the US from education exchanges with the EU. Support networking of US academics conducting EU-related research.
- Local schools could be seen as potentially useful points of entry for EU Public Diplomacy at the local level. In particular, the interviewed elites recommended outreach in K-12 grades, meaning in elementary, middle and high schools.

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