

CRISIS OF CONFIDENCE: HOW EUROPEANS SEE THEIR PLACE IN THE WORLD

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SUMMARY

- Public faith in EU institutions has declined due to their handling of the covid-19 pandemic and vaccine procurement.
- This effect is strongest in Germany: disappointment with the EU has now spread from the periphery to the centre.
- However, the European project is not doomed, as citizens still believe in the need for greater cooperation – particularly in strengthening the EU as a global actor.
- Europeans see the world as being made up of strategic partnerships, with no automatic alliances.
- They are sceptical about the restoration of America's leadership and feel that there can be no return to the West of the cold war era.
- They acknowledge the centrality of the EU in their future, but their sense of shared vulnerability will not be enough to move the European project forward. The EU should demonstrate its capacity to deliver.

Introduction

On 4 April 2021, a headline in the *Daily Express* – one of the United Kingdom’s most anti-EU tabloids – screamed: “Thanks, Ursula! UK’s booming vaccine programme has EU chief VDL to thank”. The story smacked of schadenfreude. As the UK’s vaccine roll-out accelerated, panicked questions echoed through the corridors of European capitals about why the European Union’s own roll-out was going so slowly. But it also hit on a very uncomfortable truth: that the UK, having left the EU, was able to secure swift vaccine authorisation and tight contracting with pharmaceutical firms. It called into question prior assumptions that EU member states were better equipped to see off the global pandemic by virtue of being part of a union.

The covid-19 crisis has been a difficult storm for many countries and regions to weather. But, for the EU, the crisis was existential, coming soon after other challenges to the bloc, including the 2008 financial crisis, the refugee crisis, and Brexit. The onslaught of the pandemic was the EU’s chance to prove to citizens that it could move quickly and decisively in their best interests. It was an opportunity for the EU to present itself as a strong, global actor capable of guiding the international response and withstanding any new crises that could emerge in our hyperconnected world. But the EU missed its opportunity to present a credible narrative of strong European leadership after the agreement of the EU recovery package in summer 2020. Then, the slow and chaotic start to the vaccine roll-out at the beginning of 2021 raised big questions about the EU’s capacity to steer its member states through the crisis. Disappointment with EU institutions has now come out of the periphery and gone mainstream.

But rather than losing faith in the EU project, European citizens make a distinction between the need for greater cooperation and solidarity at a European level, and their confidence in the current EU to deliver.

ECFR has been commissioning regular public opinion surveys across the EU since 2019. In April 2020, our pan-European survey showed that 63 per cent of Europeans believed that the coronavirus crisis showed the need for greater cooperation at the EU level. Having conducted public opinion surveys on the EU for the past three years, we are able to compare pre-pandemic public opinion to current opinion. This makes us well placed to understand how the coronavirus pandemic and the vaccine roll-out have changed public opinion about the EU and its position in the world.

We commissioned surveys in April and May 2021 – by Datapraxis and YouGov (in Germany and France), Dynata (in Denmark, Spain, Hungary, Poland, Portugal, Sweden, Italy, and Austria), AnalitiQs (in the Netherlands), and Alpha (in Bulgaria) – to explore European opinions about the EU’s global engagement in the battle against covid-19. We also asked what sort of actor the public

want the EU to be in the post-coronavirus world.

The results show that EU leaders still have an opportunity to use the bloc's global role to reboot the permissive consensus for the European project – even at a moment when it is extremely fragile. Nonetheless, if the EU fails to build up its resilience to the new sorts of crises our interconnected world faces today, our data indicate that the EU itself may risk becoming another casualty of covid-19.

Decision time for the EU

There is no hiding the fact that EU institutions have missed an opportunity to prove their value to European voters during the covid-19 pandemic. Our survey data suggest that the slow vaccine roll-out, and the extensive media coverage of this, has had an impact on public opinion. In all countries surveyed except for Bulgaria, Denmark, and Sweden, fewer respondents agreed that the covid-19 crisis showed a need for more European cooperation in 2021 than in 2020. There is clearly disappointment with the performance of the current institutions in dealing with the crisis. This negative sentiment goes beyond anti-EU voters and well into the mainstream.

Besides a general sense of disappointment, public opinion offers a mixed picture. Generally, citizens in larger member states, such as Germany, assess the EU's performance more harshly than those in smaller ones do. Majorities in Austria, Bulgaria, France, Germany, Italy, and the Netherlands have reported lower confidence, or stable levels of low confidence, in the EU since the start of the pandemic. When we asked whether the EU political system works well or is broken in Denmark, France, Portugal, and Spain, there was a slight increase in the sense that the system is broken. In Germany, the share of people who believe the EU system is broken is 11 percentage points higher than it was before the pandemic. They now form a majority. In all other EU member states except for Bulgaria, there has been no change. In some cases, the percentage of people who think the EU system is broken has dropped – most significantly in Italy, which has seen a decrease in such sentiments of 5 percentage points.

Despite their disappointment with current EU institutions, Europeans still believe in the importance of the European project. Majorities everywhere except for France and Germany still say that covid-19 shows the need for more European cooperation. In Germany and France, this is the most broadly held view by a significant margin (at 47 per cent and 45 per cent respectively). When asked whether their country's membership of the EU is a good thing or bad thing, the most common answer in every country except France was that the EU is a good thing. In France, the most common answer was that the EU is neither a good nor bad thing. When taking other data points into account, in France, good and very good combined exceeded bad and very bad combined by 16 percentage points. When we

asked which actors respondents expected help from during the recovery from covid-19, the numbers placing their faith in the EU increased from when we asked the same question in April 2020.

The fact that two of the EU's largest and most influential states – France and Germany – are the least convinced about the need for European cooperation underlines the urgency with which the EU needs to up its game. Both countries have important national elections coming up in the next year, which may present a challenge for the EU's leaders – with Euroscepticism having increased due to EU institutions' poor handling of the vaccine roll-out.

Our polling data indicates that the EU has used up its second chances now that trust in EU institutions has weakened. Though there is greater disappointment with the political system than when we surveyed EU citizens last year, Europe's political leaders need to be clear-eyed about the choice in front of them regarding the European project. The embattled belief in the need for European cooperation will not hold through further failure. At this critical moment in time, Europe's leaders need to ensure that EU institutions do not overreach or over-promise. They should focus on playing a role where they can genuinely enhance national governments' efforts, and in which the European public want to see them engaged. As we move into a period where the focus will be on managing a socially inclusive and green economic recovery following the pandemic, the EU has an opportunity to shine. The recovery fund sets the EU up for success – and, if it can deliver on its promises, national leaders need to give EU institutions some credit for the success.

Our 2021 survey data shows that building up European power and the EU's global role is vital if the EU wants to make a comeback. When we asked how the EU should change after covid-19 (as we did last year), seven out of 12 countries polled said that it needed to develop a unified response to global threats and challenges – the most common answer overall. The fact that, in Germany and France, bringing the supply of critical medical supplies back to the EU was a common response indicates the importance of economic sovereignty in building the EU up as a global actor, to ensure that there is public support for this in the bloc's two largest states.

Furthermore, when we asked about respondents' preferences for what the EU should be, the two most common answers – representing almost half of respondents who chose an option – concerned its global role: 33 per cent chose the option that the EU should be a beacon of democracy and human rights; and 18 per cent said that the EU should be one of the world's great powers, capable of defending itself.

This focus on the need to develop European power may come in no small in part from Europeans' perception of the world around them after covid-19.

Once the coronavirus crisis is over, which, if any, of the following best reflect how you think things should change in Europe? In per cent.

● AT ● BG ● DE ● DK ● ES ● FR ● HU ● IT ● NL ● PL ● PT ● SE ● Total

The EU should ensure a more unified response to global threats and challenges.

EU states should be more prepared to share the financial burden of a crisis

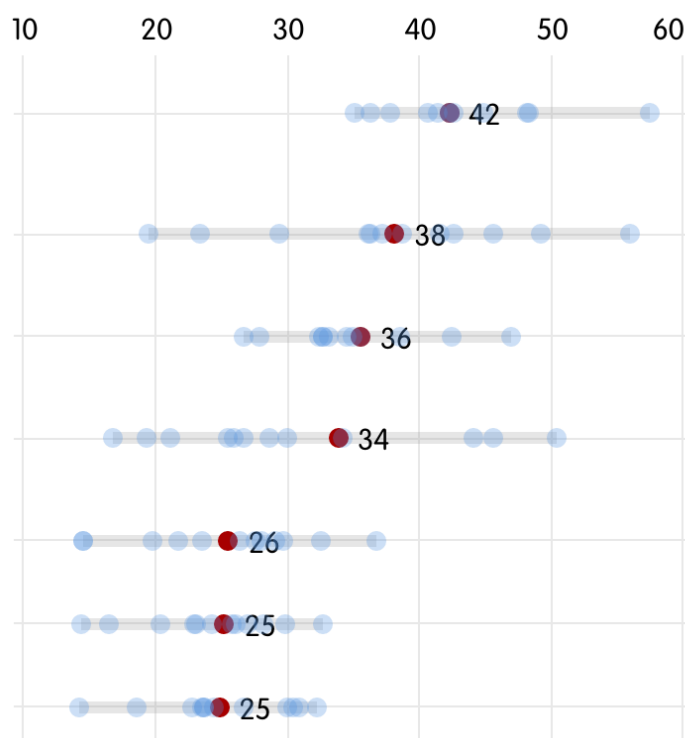
There should be more control over the EU's external borders

Businesses should be pushed to produce more medical supplies in the EU, even if this means higher prices

The EU should increase its efforts to transition away from carbon in the EU

There should be more control over borders between EU states

The EU should return more powers to the national level



Survey conducted in April 2021. The question allowed for a multiple answers.

Source: Datapraxis and YouGov (DE, FR), Dynata (DK, ES, HU, PL, PT, SE, IT, AT), AnalitiQs (NL), and Alpha (BG)

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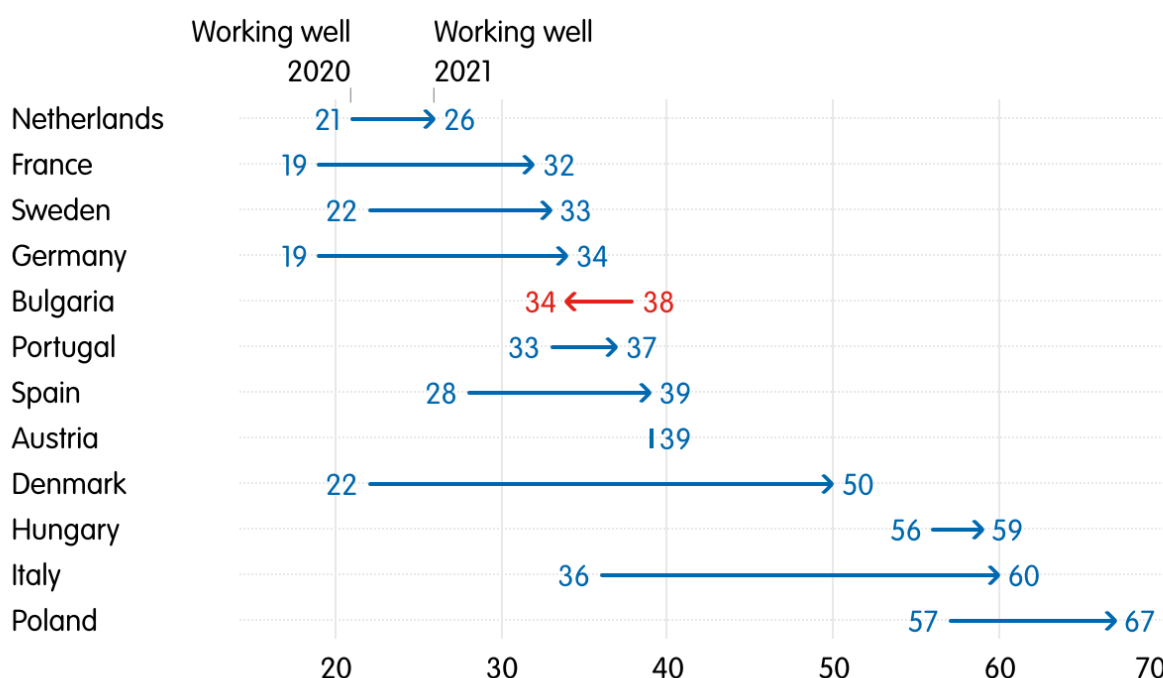
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The EU and the transatlantic relationship

Polling conducted shortly after the election of Joe Biden in late 2020 revealed how much Donald Trump's presidency has damaged American power. At that time, majorities in key EU member states felt that the US political system was broken. More than that, Europeans believed China would be more powerful than the US within a decade, and that they would want to remain neutral in a conflict between the US, Russia, and China rather than align with Washington. In many EU member states, people saw Berlin – rather than Washington – as their most important partner. In response to our findings, we were often told that, once Biden took office, the tide would quickly turn and trust in the US would be restored.

Now, four months into the Biden presidency, Europeans do indeed see the United States in a somewhat more positive light. The new US administration has worked hard to repair and revitalise the damaged transatlantic relationship. Biden himself, as well as Secretary of State Antony Blinken, have already participated in a number of meetings with European leaders. Both emphasised on those occasions that they were determined to re-engage with Europe, to consult with Europeans, and to earn back the United States' position of trusted leadership. The effort is starting to pay off. Our data show that perceptions of the American political system have generally improved since autumn 2020.

Do you think the political system of the United States is working well or is broken? Share of the population who believe the system works well, in per cent.



Surveys conducted in November 2020 and April 2021. Question read: "thinking about the political system of the United States, do you think it works well or is it broken?"

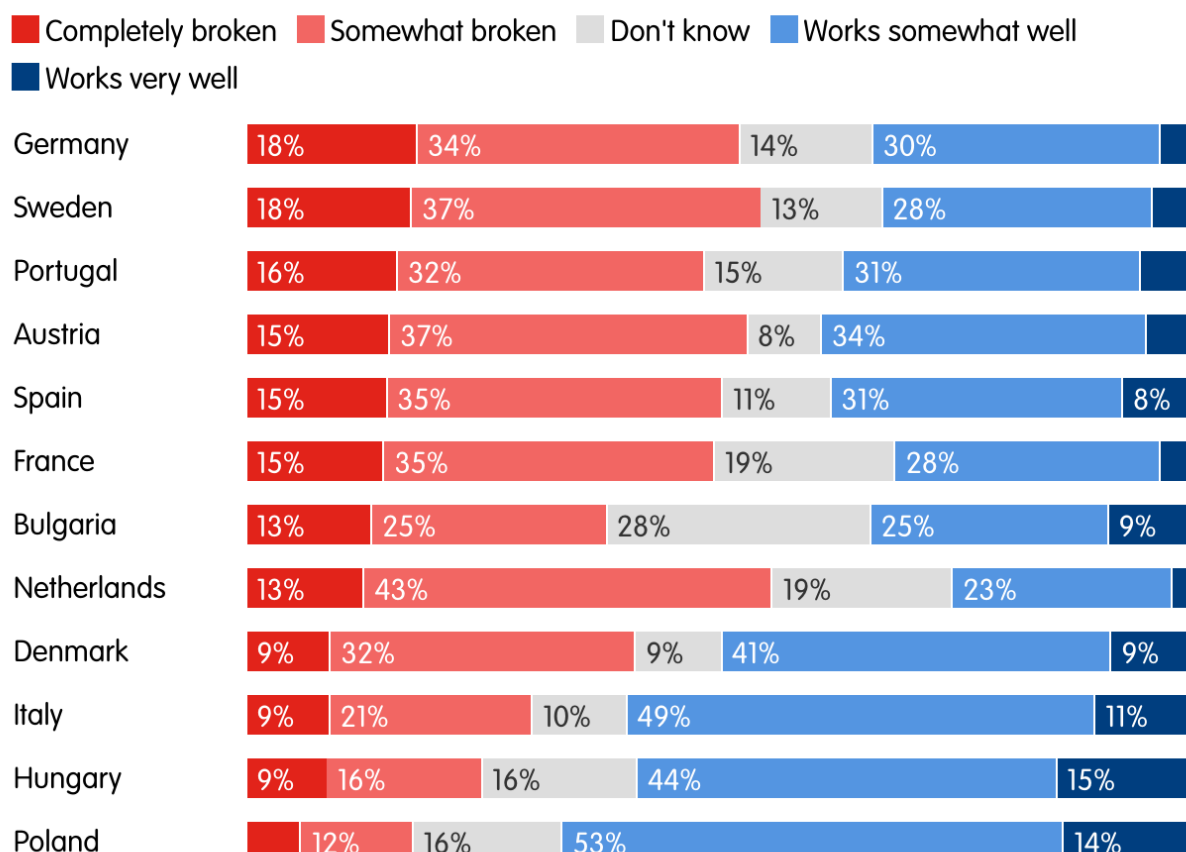
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However, there is still a widespread lack of confidence in the United States' ability to come back as the 'leader' of the West. Few EU countries see the US political system as working well. About half of respondents in France and Portugal – and more than half in Austria, Germany, the Netherlands, Spain, and Sweden – still think the American political system is broken. Only single-digit percentages

of respondents have faith in it working very well. This contrasts with the double-digit percentages of people who believe the US political system is completely broken.

Only in Poland, Hungary, and Italy do large majorities believe the American political system works well or very well. In Denmark and Bulgaria, opinion is divided.

Do you think the political system of the United States is working well or is broken?



Survey conducted in April 2021. Question read: "Thinking about the political system of the United States, do you think it works well or is it broken?"

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Overall, our data suggest that the fundamental uncertainty that has entered transatlantic relations since the election of Trump cannot be overturned quickly. Trump's legacy and the images of the Capitol building being stormed by rioters in January 2021 still seem to be deeply ingrained in the minds of Europeans. The mistrust that has arisen over the last four years is clearly not just about Trump as a person but also about the political system that made his election possible in the first place,

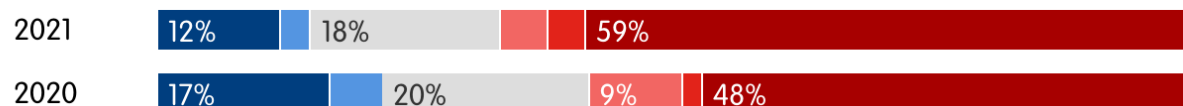
and that could bring another Trumpian leader – or Trump himself – into the White House in four years' time.

Therefore, Europeans have modest expectations of the new leadership in Washington. Following our survey in spring 2020, we asked Europeans once again in spring 2021 who they expected to receive the most support from in recovering from the pandemic. In spring 2020, only 3 per cent of Europeans identified the US as an actor they could expect help from. In Italy (5 per cent) and Poland (7 per cent), the figures were a little higher – but still often lower than those for the help they expected from other European countries, EU institutions, China, or Russia. In 2021 this picture has changed only marginally, even though the US is in a much better position to deal with the pandemic now than it was 12 months ago and has been very successful in vaccinating American citizens. On average, expectations of assistance from the US have risen by two to three percentage points in EU member states, but are still in the low single digits. In Italy and Poland, expectations for the US are highest, with 14 per cent expecting assistance.

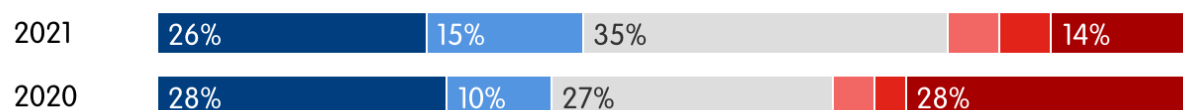
Where do you expect your country to receive the most support from when recovering from the covid-19 crisis?

■ European Union institutions
 ■ Other European countries
 ■ Other/don't know
 ■ China/Russia
 ■ US
 ■ No one – my country can only rely on itself

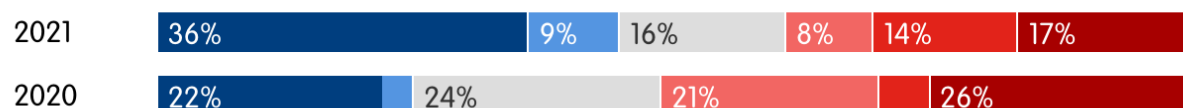
Germany



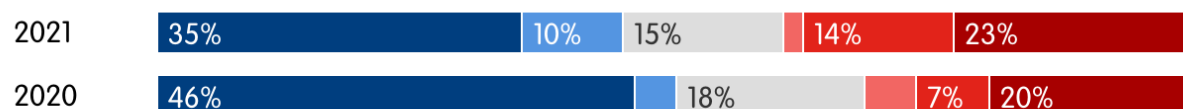
France



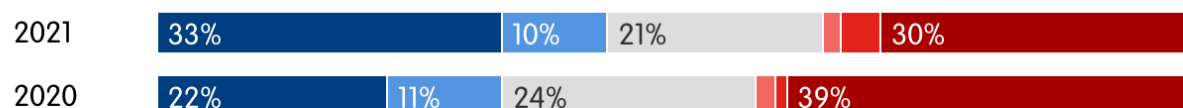
Italy



Poland



Sweden



Spain



Surveys conducted in April 2020 and April 2021.

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A new era of self-reliance for the EU?

Trust in EU institutions may be weak but, in comparison to April 2020, more European citizens now believe that they can expect support from these institutions and from other member states, especially Germany. Over the past year, citizens have clearly taken note of the fact that member states and EU institutions have often demonstrated solidarity with each other. As our polling shows, the share of people who are hopeful of receiving support from other EU member states or EU institutions in dealing with the pandemic is 38 per cent in Austria, 63 per cent in Bulgaria, 49 per cent in Denmark, 39 per cent in France, 40 per cent in Hungary, 42 per cent in Italy, 42 per cent in the Netherlands, 55 per cent in Spain, and 40 per cent in Sweden. There have been striking increases in expectations of EU institutions in some countries: 17 percentage points in Bulgaria and 14 percentage points in Italy, but also 14 percentage points in Denmark and 11 percentage points in Sweden. And, in the Netherlands and France, the number of people who look to Germany for support is particularly high.

Only in three countries have expectations of support from EU institutions or other member states decreased. In Portugal, the figure has dropped from 75 per cent (2020) to 70 per cent (2021), but the Portuguese still have the highest expectations of Europe out of all those polled. In Poland, the figure has dropped by just 8 percentage points, from 50 per cent in 2020 to 42 per cent in 2021. But the most significant change is in Germany, where expectations of Europe are down to just 14 per cent. A large majority (59 per cent) of Germans believe they can only depend on their own strength in the crisis.

More than a year after the start of the pandemic, the feeling has taken root among Europeans that they cannot rely on the US, Russia, or China, and that they must move towards greater self-reliance either at the national level or as part of the EU.

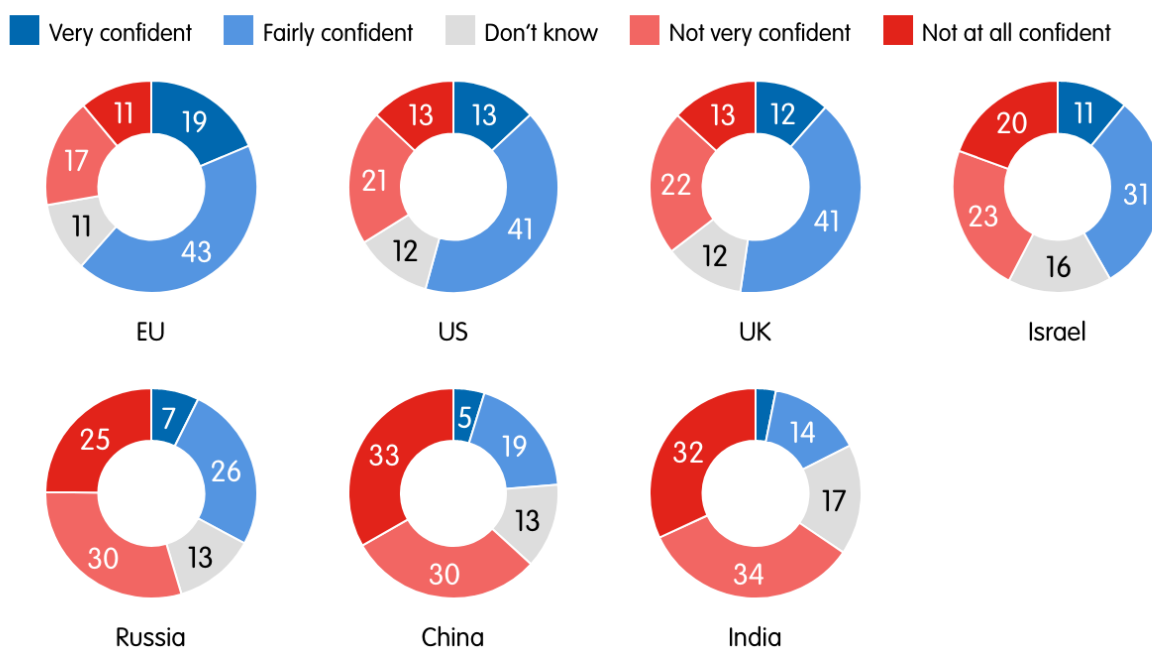
The EU's relationships with other global actors: pragmatic, not equidistant

This does not mean that Europeans have become equidistant between great powers during the current crisis. When it comes to their health, Europeans still have more trust in Western medicine than any other kind, particularly regarding confidence in vaccines. Europeans have the most confidence in EU-produced vaccines, with 62 per cent of Europeans fairly or very confident about taking such vaccines. This is followed by vaccines produced in the US (54 per cent) and the UK (52 per cent) – although the confidence placed in those vaccines varies across Europe. While 67 per cent in Italy are confident in

receiving a US-produced vaccine, this figure is only 48 per cent in Germany and 34 per cent in Bulgaria. In most European countries, a majority of people would be fairly confident in receiving a vaccine that was developed in the UK.

At the same time, Europeans are deeply suspicious of Chinese vaccines. Overall, just one-quarter of people surveyed expressed confidence in China's vaccine. Only the vaccine developed in India – which, in fact, has physically produced a large proportion of the vaccines used globally – scored worse. Although trust in a vaccine developed in Russia is very low overall, confidence levels vary across Europe. Only 12 per cent of Poles are confident in the Russian vaccine, while about half of respondents in Italy, Hungary, and Bulgaria say they would be confident in receiving it. Overall, this shows that Europeans trust the US and the UK far more when it comes to making decisions about their own health.

How confident, if at all, would you feel about receiving a covid-19 vaccine that was developed in the following places? Jointly for all 12 countries polled, in per cent.



Survey conducted in April 2021.

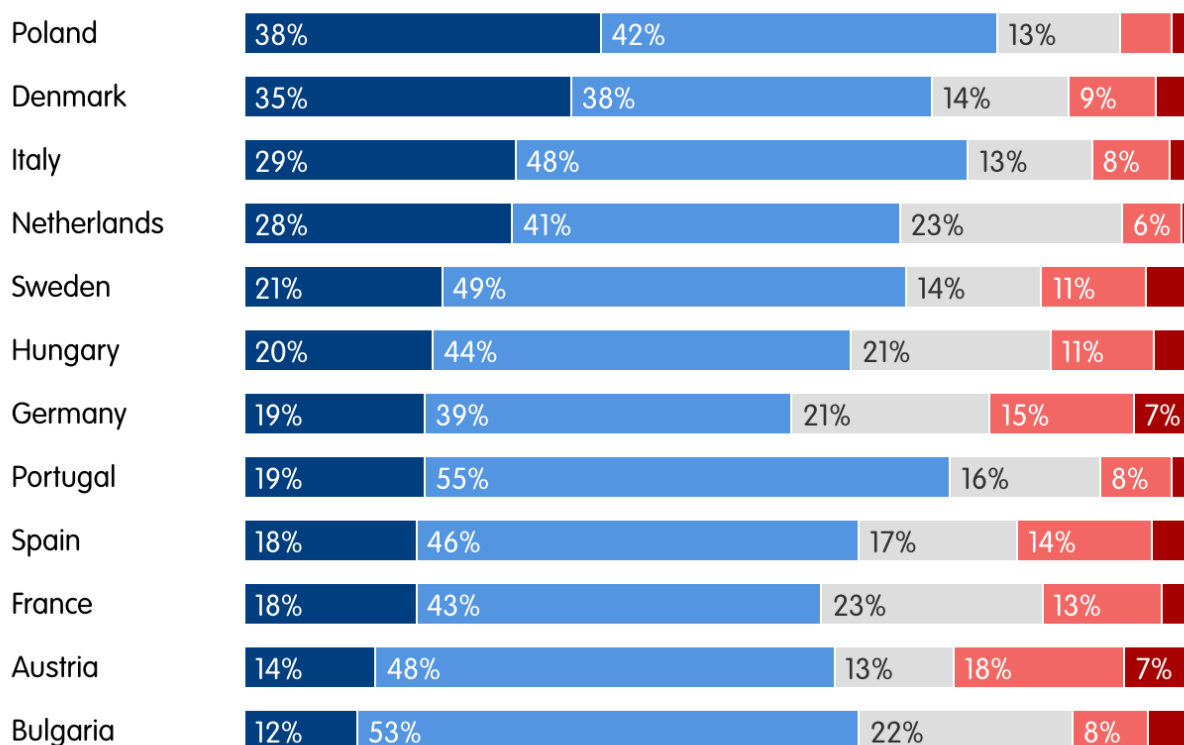
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A similar trend of trusting the US and the UK is reflected in answers to the question of who Europeans see as their allies, necessary partners, rivals, or adversaries. Taking the votes for “ally” and “necessary

partner” together, Europeans feel that they must strategically cooperate with the US. The share of respondents who hold this view ranges from 58 per cent in Germany to 80 per cent in Poland. What is striking, however, is that no EU member state sees the US as predominantly an ally who “shares our [European] interests and values”. This sense of alliance is most pronounced in Poland and Denmark but, even there, the US is predominantly perceived as a necessary partner. In Germany and Austria, there are minorities of more than 20 per cent who see the US as a rival or an adversary.

What is your view on the United States' relationship with Europe?

■ An ally – a country that shares our interests and values ■ A necessary partner – a country we must strategically cooperate with ■ Don't know ■ A rival – a country with which we need to compete ■ An adversary – a country we are in conflict with



Survey conducted in April 2021. Question read: “Generally speaking, thinking about the US, which of the following best reflects your view on who they are to Europe?”

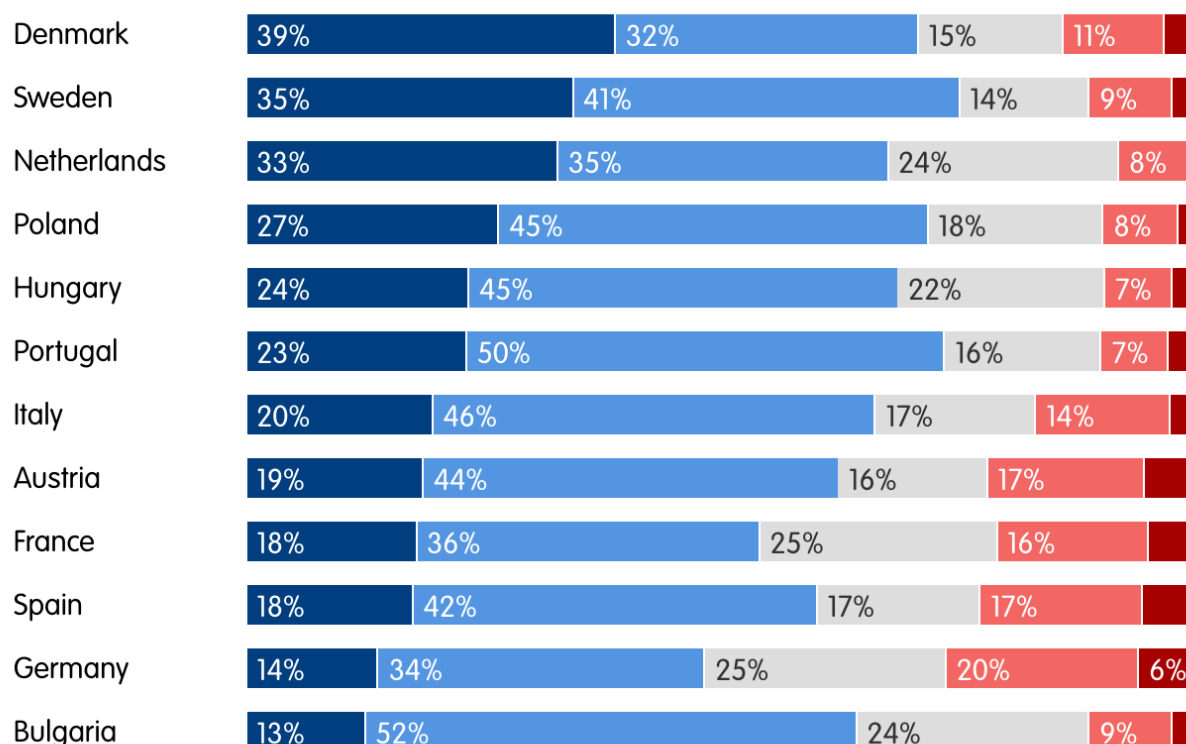
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The data present a mixed picture of the UK as well. Most people by far see the UK as an “ally” or a “necessary partner”, with a greater proportion of them choosing “necessary partner”. This means that EU citizens tend to see the UK as a country with which they must cooperate strategically rather than one with which they share interests and values. Only in Denmark (35 per cent) do a plurality of

respondents see the UK as an ally. At the other end of the spectrum, there are minorities of more than 20 per cent in Germany, France, Austria, and Spain who see the UK as a rival or an adversary. In Germany, the picture is mixed. While 26 per cent of people see the UK as a rival or an adversary, 48 per cent see the UK as an important ally or strategic partner.

What is your view on the United Kingdom's relationship with Europe?

■ An ally – a country that shares our interests and values ■ A necessary partner – a country we must strategically cooperate with ■ Don't know ■ A rival – a country with which we need to compete ■ An adversary – a country we are in conflict with



Survey conducted in April 2021. Question read: "Generally speaking, thinking about the Great Britain, which of the following best reflects your view on who they are to Europe?"

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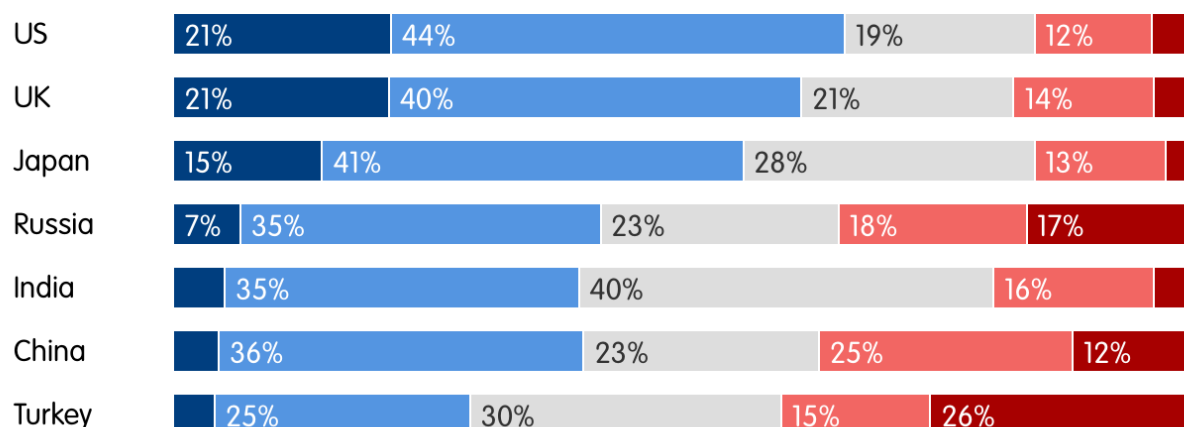
While Europeans still feel a special emotional connection with the UK and the US, Brexit and the election of Trump have contributed to a broad sense of disenchantment. The instinctive sense Europeans have of the West no longer fits the geopolitical reality they now live in. The dream of the cold war-era West belongs to the past. This causes European voters to feel the EU no longer has natural alliances that transcend different policy issues – a sentiment that indicates the need to build a stronger sense of European sovereignty and pursue transactional partnerships. In a world of

competing great powers, Europeans see a need to cultivate strategic partnerships with various countries. Our survey shows that Europeans are already walking down that path and taking a cooperative rather than confrontational approach to the changing international environment. They appear to be keen to forge their own path not in fundamental opposition to, but rather in pragmatic cooperation with, others.

China and Russia are seen by most respondents as necessary partners, but rarely as allies. Only 12 per cent of all respondents see China as an adversary. But relatively large percentages of people in Sweden (21 per cent), Germany (17 per cent), and Denmark (17 per cent) view China in this way. A total of 17 per cent of respondents across all EU member states polled think of Russia as an adversary. But the outliers are Bulgaria, Italy, and Portugal, where just 5-7 per cent of people feel the same way. In Bulgaria, 25 per cent of respondents see Russia as an ally that shares their country's interests and values.

What are your views on the following countries' relationships with Europe? Jointly for all 12 countries polled.

■ An ally – a country that shares our interests and values ■ A necessary partner – a country we must strategically cooperate with ■ Don't know ■ A rival – a country with which we need to compete ■ An adversary – a country we are in conflict with



Surveys conducted in April 2021. Question read: "Generally speaking, thinking about the countries below, which of the following best reflects your view on who they are to Europe?"

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Turkey is the only country that more Europeans see as an adversary than a necessary partner. Given that Turkey is a NATO member – unlike China, Russia, India, and Japan, all of which Europeans

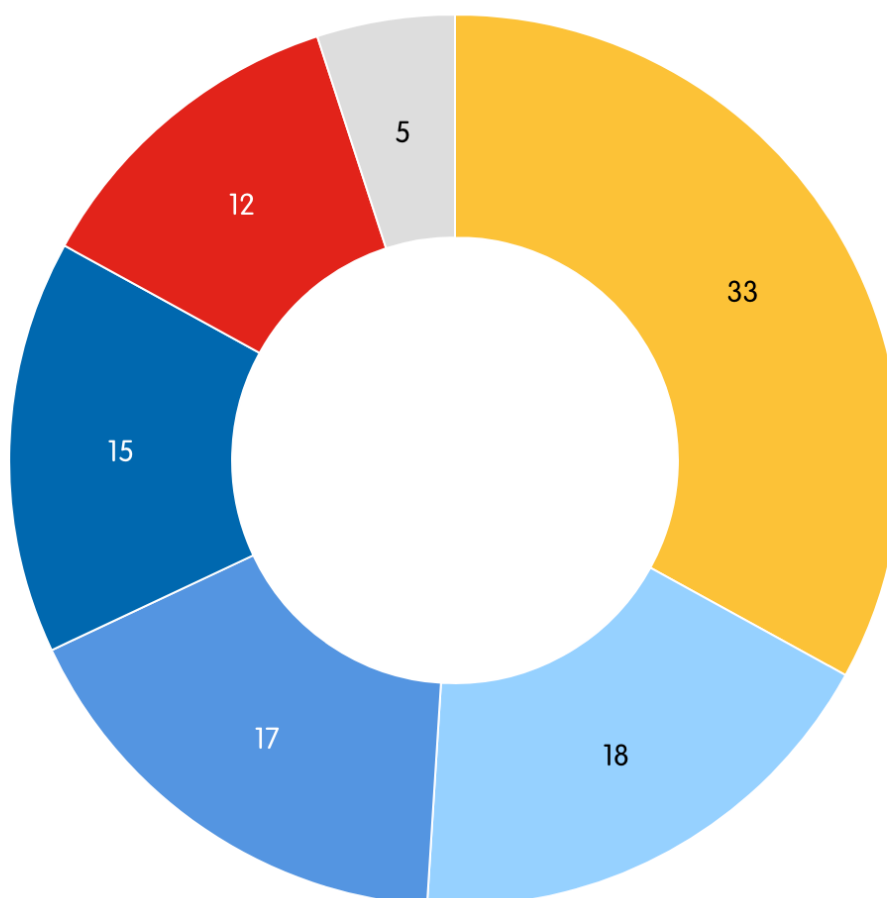
consider less threatening – this finding is quite worrying. Only 25 per cent of Europeans see Turkey as a necessary partner, and only 4 per cent see it as an ally with shared values and interests. In Germany, 41 per cent of respondents consider Turkey an adversary.

What do citizens want from the EU?

Building European sovereignty by becoming stronger and more self-reliant could help Europeans feel safer in this uncertain world. Instinctively, policymakers might assume that an interests-based foreign policy is the surest way to make European citizens feel protected. But, strikingly, our data suggest that European voters do not see the world through that lens. A lot has changed since 2007, when the Lisbon Treaty of the EU set out the aspiration that: “the Union’s action on the international scene shall be guided by the principles which have inspired its own creation ... and which it seeks to advance in the wider world: democracy, the rule of law, the universality and indivisibility of human rights and fundamental freedoms, respect for human dignity, the principles of equality and solidarity, and respect for the principles of the United Nations Charter and international law.” In today’s world of competitive great power politics, these ideas seem to belong to a different era. But our survey data indicate that this is still precisely the sort of values-based foreign policy that Europeans want to see. Citizens of the EU regard soft power as a core part of European power.

Which of the following best reflects your preference for what the EU should be? Jointly for all 12 countries polled, in per cent.

- The EU should be a beacon of democracy and human rights, prioritising the rule of law and high democratic standards within its own ranks
- The EU should be one of the world's great powers, capable of defending itself from external threats, including through military means when necessary
- The EU should be a defender of European traditions and values, keeping nation states strong
- The EU should be an open and thriving single market, with integration largely limited to the economic domain
- The EU should be dismantled; EU countries would be better off without it
- None of the above



Survey conducted in April 2021. Excludes those who responded "don't know".

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When we asked which vision of the European project respondents identified with most, 33 per cent – a plurality among those who chose an option – said they see the EU as “a beacon of democracy and human rights, prioritising the rule of law and democratic values within its own ranks”. This was the most common answer in every country except for France, where it was joint top with a vision of the

EU as “one of the world’s great powers, capable of defending itself from internal and external threats, through military means if necessary”. Bulgaria also diverged from the norm, seeing the EU as a “defender of European traditions and values”.

EU policymakers should take some reassurance from the fact that only around 12 per cent of respondents across Europe felt that “the EU should be dismantled”, underlining the fact that citizens have not given up on the European project. The next generation offer even more hope: our data show that younger people were less likely to be in favour of dismantling the EU than respondents over the age of 40.

We asked some specific questions about trade-offs in the EU’s relations with China and Turkey, including whether the EU should criticise violations of human rights and the rule of law, or should refrain from doing so to prioritise trade and security in these relationships. The results were startlingly clear. A plurality in every country except Hungary and Bulgaria responded that the EU should criticise violations when they occurred. Clearly, the European Council’s decision to impose sanctions on China earlier in 2021 for human rights violations in Hong Kong and Xinjiang was the right one as far as European voters were concerned.

The EU should invest in a values-based foreign policy, given the strength of support for this in countries such as France, Germany, and Spain – where there is a growing sense that the EU system is broken. Such a policy gives the EU a global role that citizens of these countries can more closely identify with.

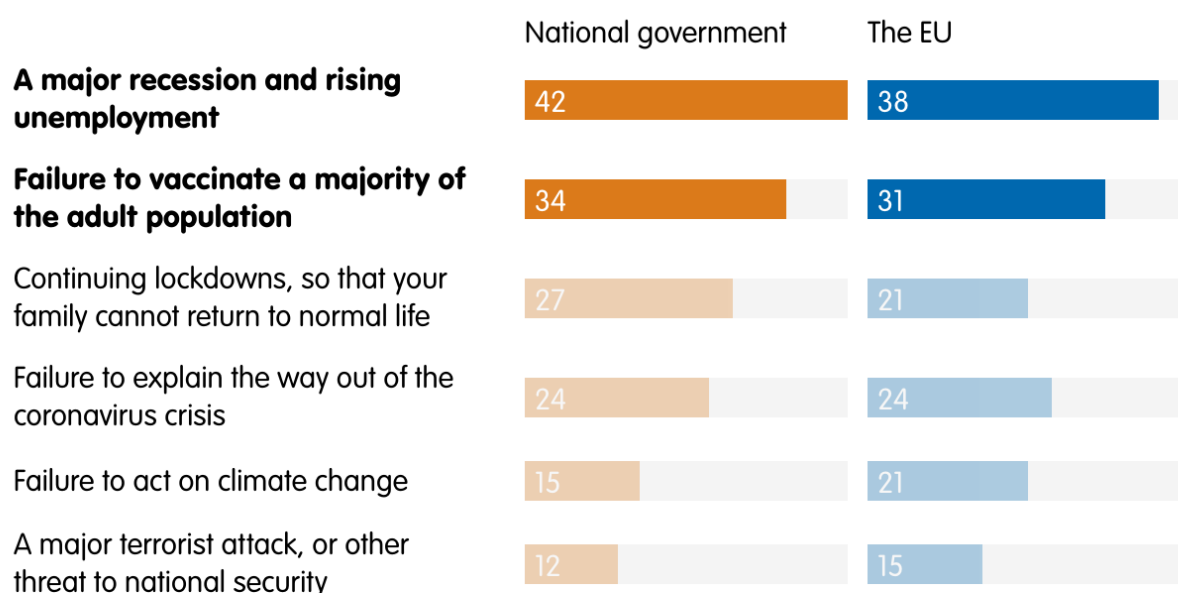
Of those respondents who want to see a more unified response to global threats and challenges after the pandemic, 40 per cent say they want the EU to be “a beacon of liberal democracy”. This is by far the most common vision for the EU among respondents who want the EU to have a more unified response to global threats and challenges.

Those who see the EU as a beacon of liberal democracy are broadly still confident in it: 39 per cent have the same level of confidence, and 12 per cent more confidence, than they did in spring 2020. Only 11 per cent have much less confidence and 19 per cent slightly less confidence. In some ways, this indicates that building a values-based foreign policy would create a solid foundation of support among voters who are most likely to stand behind the European project. But, in a moment when the permissive consensus is so fragile, it is vital the EU makes that foundation strong.

As the EU reaches a point when it has vaccinated the majority of its vulnerable citizens, its leaders should be aware that support for the EU as a force for good extends beyond diplomacy to medical aid. When we asked about the EU’s strategy for vaccine sharing, 34 per cent of respondents were in favour

of immediately sharing vaccines to help poorer countries. This was the most common answer across the EU. This was also the most common answer everywhere except for Germany and Austria. The answer was particularly common among those who subscribe to one of the visions of the EU as a strong global actor. Indeed, 45 per cent of those who view the EU as a beacon of liberal democracy chose this option. Only 4 per cent of respondents answered that the EU should not be sharing vaccines or medical capacity with poorer countries any time soon. This response was most common among those who want to see the EU dismantled.

Thinking about the threats to your country in 2021, which of the following would you consider to be the worst failures on the part of your government or the EU, if they occurred? Jointly for all 12 countries polled, in per cent.



Survey conducted in April 2021.

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The European Commission came under heavy fire throughout February and March 2021 for failing to secure a sufficient supply of vaccines for EU citizens. At the same time, close to half of the vaccine supply produced in the EU was exported at that time. However, choosing not to block vaccine exports appears to have reflected the wishes of voters. Perhaps the lesson for EU institutions is that, in future, they need to be clearer about communicating their approach, confidently own the decisions they have made, and explain the reasoning behind them. To the public, the situation with the vaccines appeared

to be an accident on the part of the EU rather than a calculated strategy based on the principle that no country would be safe from the pandemic until every country had sufficient access to the vaccine.

In the US, by contrast, no natively produced vaccines were exported. And yet the Biden administration is now happily wearing the mantle of global health champion, particularly following its recent decision to challenge pharmaceutical companies' rights to enforce their intellectual property on covid-19 vaccines. In the communications and politics around the pandemic, the European Commission has failed to strategically fight its corner. This is a mistake that the EU cannot afford to repeat in tackling the economic recovery. When we asked survey respondents what they would consider the greatest failure on the part of the EU during 2021, the most common answer was failing to tackle a major recession and rising unemployment.

Conclusion

Fifteen months after the start of the covid-19 pandemic, many European citizens have less confidence in EU institutions. Their hopes and expectations for better and more effective European cooperation – which were visible at the beginning of this crisis – have obviously not been met. Still, Europeans seem to recognise that the leaders of the current institutions, however much they may disappoint, only have temporary stewardship of the EU. The European project still enjoys strong support among the populations of EU member states. But our survey shows that the permissive consensus for the European project can no longer be taken for granted. It is a wake-up call to channel the remaining support for the EU in the right direction. A sense of shared vulnerability will not be sufficient to move the European project forward in the post-pandemic years. EU institutions must now demonstrate their capacity to serve European citizens by improving the EU's strength, its ability to act on the global stage, and its support for member states as they navigate out of the pandemic.

The EU's leaders can strengthen the permissive consensus by building up the EU's capacity as a global actor. The EU should strive to be a beacon of democracy that can protect citizens against new global threats and challenges. If the EU fails to do this, or to communicate to voters how it is doing so, its legitimacy will be on the line.

Our survey data show that the need to build European sovereignty has become urgent. After Biden's election, European policymakers may have questioned whether this was still necessary given that the US was 'back'. Yet, because of the impact of covid-19 on how Europeans think about the world, it is more necessary than ever. Brexit and the election of Trump have left deep scars on Europe. EU citizens have greater trust in the West. And they see the US and the UK as their most important partners. But they are aware that, in an era of great power competition, they must ultimately rely

more on themselves.

Nonetheless, Europe cannot just go it alone. European leaders should still try to build up their sovereignty as a transatlantic endeavour, each dimension of which – from security to the international rules around trade and global health, to the climate challenge – helps the EU and its transatlantic partners reinforce each other. The outcomes will be stronger for both sides if they can collaborate on solutions.

Our survey shows that Europeans generally want a cooperative rather than a confrontational foreign policy. The idea of “strategic partnerships” is deeply embedded in the DNA of Europeans. At the same time, Europeans understand there are aspects of their relations with Russia, China, and Turkey that make these countries rivals or even adversaries. Europeans are partnership-minded, but not equidistant between great powers.

When the EU’s high representative, Josep Borrell, talks about the EU learning the language of power, this should not mean the EU neglects its values to pursue traditional great power politics. The EU’s emphasis on soft power, international cooperation, and legal solutions is not seen as a weakness by its citizens. Rather, they see it as the EU’s greatest virtue.

With that in mind, Europeans cannot afford to forget the values pillar of sovereignty. The EU must shape the post-coronavirus world in line with what Europeans think binds them together – a belief in human rights, democracy, and the rule of law. By living up to what Europeans want and what they aspire to, the EU and its leaders can demonstrate the value of the project in a post-Western world. European decision-makers should, therefore, double down on their efforts to strengthen democracy and the rule of law at home. After all, to be a beacon, the inner constitution of the EU must be radiant – especially if it wants to effectively and credibly carry the torch of democracy at home and abroad.

If the EU develops the ability, tools, instruments, and resources to present itself as a global champion of the rules-based international order and sticks to its commitment to multilateralism and international cooperation, it will become an even more attractive partner for other like-minded actors. Developing the different dimensions of European sovereignty will reinforce the EU’s ability to shape the post-coronavirus international system. But, in an international environment marked by the resurgence of nationalism and coercive politics, the EU must preserve its identity. Europeans must learn to proudly speak their own language of power – one that corresponds to their nature and that is understood by the European public.

Methodology

This paper is based on a public opinion poll in 12 EU countries that the European Council on Foreign Relations commissioned from Datapraxis and YouGov (France, Germany), Dynata (Austria, Denmark, Hungary, Italy, Poland, Portugal, Spain, Sweden), AnalitiQs (Netherlands), and Alpha (Bulgaria). The survey was conducted in April 2021, with an overall sample of 17,231 respondents.

This was an online survey conducted in Austria (n = 1,027), Denmark (n = 1,012), France (n = 3,026), Germany (n = 3,080), Hungary (n = 1,001), Italy (n = 1,003), the Netherlands (n = 1,008), Poland (n = 1,012), Portugal (n = 1,011), Spain (n = 2,036), and Sweden (n = 1,015). In Bulgaria (n = 1,000), the survey was conducted online and through telephone interviews. The results are nationally representative on basic demographics and past votes in each country.

The general margin of error is $\pm 3\%$ for a sample of 1,000 and $\pm 2\%$ for 2,000 and 3,000. In France and Germany, YouGov used purposive active sampling for this poll.

The exact dates of polling are: Austria (14-29 April), Bulgaria (8-13 April), Denmark (13-30 April), France (31 March-7 April), Germany (31 March-8 April), Hungary (14-30 April), Italy (14-23 April), Netherlands (1-9 April), Poland (14-29 April), Portugal (13-30 April), Spain (14-30 April), and Sweden (14-30 April).

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Despite these many and varied contributions, any mistakes remain the authors' own.

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