

# Future of Europe

## Standing in Unity, Respecting Diversity

### A Survey Into Citizens' Perspectives on the Future of Europe

ANNE BLANKSMA ÇETA AND  
FEDERICO OTTAVIO REHO

Since the eurozone crisis of 2009, the future of Europe has been framed as a choice between more or less Europe, between the competing visions of EU federalists and populist nationalists. This paper demonstrates that this polarity is increasingly at odds with public perceptions of the future of Europe. European policy attitudes are characterised by a great diversity of viewpoints rooted in different values and national interests. This diversity must be respected and taken seriously. However, there is also a growing consensus about the need for a united European response to common external threats such as Russian aggression, climate change and the geopolitical conflicts affecting our economic and values systems. In a world adrift, the flag around which we rally is increasingly becoming European. This paper explores public opinion on four main policy areas fundamental to our future: the European economy, our common security, joint climate action and shared EU values. The research is based on 4 extensive surveys conducted in 10 EU countries between January 2020 and March 2022. They measure citizens' perspectives both just before and after Russia's invasion of Ukraine. For this research, the Martens Centre has partnered with global research agency Glocalities, which has developed a research methodology to measure cultural diversity between EU countries and values differences within European societies.



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# Executive summary<sup>1</sup>

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In this report, the future of Europe is viewed through two lenses. The first is the lens of culture and values. The EU harbours so many different cultures and values that any thinking about the future of Europe requires a deep understanding of the diversity of viewpoints in Europe. Second, this report looks at the future of Europe through the lens of policy challenges. We specifically looked at four policy areas in which the EU could make real differences to people's futures: the economy, external security, climate change and values/rule of law.

Four data sources were used for this report. In January and February of 2020 and 2021, Glocalities conducted its annual values survey. Many of the results of these studies have been included in the report, particularly those on the differences in values within Europe. A bespoke survey was also specifically conducted for this report, asking 5,503 respondents in November and December 2021 about European policy challenges. In March 2022 we decided to run part of this survey again to assess the impact of the war in Ukraine on perceptions about the future of EU common security among 4,715 respondents. The surveys were conducted in 10 EU countries that combined represent the maximum differentiation in terms of geography and values in the EU. These countries are Belgium, France, Germany, Hungary, Italy, the Netherlands, Poland, Romania, Spain and Sweden.

## Cultural differences between EU countries

Four main cultural cleavages that run geographically through the EU can be identified. The first is between countries with an external EU border, in the east and south, and those countries without an external border, in the north and west. Both national pride and trust in the EU are much stronger in those countries that have historical experience of foreign occupation from outside Europe. This is especially true for countries close to the border with Russia, for which national liberation after the fall of the Iron Curtain was one of the main drivers for European (re)integration.

The second cultural cleavage is between the importance of traditional family roles and more flexible gender norms. In Central European countries traditional family values and gender norms are very important, while views in the rest of the EU tend to be more flexible. This cultural cleavage is fuelling suspicion and prejudice between Central and Western Europe. Through Western eyes the people in Central Europe are often viewed as backward and intolerant, while Central Europeans see those in the West as hedonistic and colonial in terms of imposing their own cultural values.

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<sup>1</sup> Many thanks to Panos Papadongonas (research manager) and Nanna Buhl (researcher) at Glocalities, who supported us with the development of the bespoke questionnaire, fieldwork, extensive data analyses, and the development of the tables and graphs in this report.

The third cultural cleavage also runs along the east–west axis, although it is much less pronounced in the public domain. Central Europeans appear much more supportive of technological progress and more open to change. People in the West have become much more inward looking in these domains. This is a major source of vitality and societal dynamism in Central Europe.

The last cultural cleavage is between North-Western Europe, where secular, individual pleasure-seeking lifestyles prevail, and much of the rest of Europe, where religious and communitarian lifestyles are more important. In contrast to the divide in traditional family and gender norms, in this case the North-Western countries (in our survey, the Netherlands and Sweden) form the minority.

## Diversity of values within EU society

To manage cultural diversity in the EU, it is not enough to look at geographical differences. Many of the cultural differences in Europe cannot be mapped in space, but follow from differences in values within EU societies. The Glocalities segmentation model used in this report differentiates between five such value clusters or segments in society. Creatives make up about one in three Europeans and are characterised by liberal and explorative values. The Creative mindset is dominant in the Brussels policy bubble, which mostly consists of higher educated and cosmopolitan Europeans. Another largely well-educated segment is formed of Achievers. Achievers are liberal and competitive in their economic views, but more conservative in the social domain. They are proud of their country, but also feel that they are citizens of the world. This segment also generally holds positive views of the EU.

In contrast, the two segments of Traditionalists and Socialisers are much more locally and nationally oriented, and often feel far removed from the EU. Traditionalists are status quo conservatives who make up a large part of society in Central Europe and Italy. Religion and family are very important to them. Socialisers represent the majority of the more secular lower and middle class in North-Western European countries. They embrace individual freedoms and the pleasures of consumer society, but are also looking for structure and security in a world that they often feel is changing too fast. The final values segment in our model is that of Challengers, who are competitive careerists fascinated by money, risk-taking and adventure. This more pragmatic and apolitical values segment is especially common among the European youth, who grew up in the post-ideological world that emerged after the fall of the Iron Curtain.

## The future of the European economy

In the wake of the COVID-19 crisis most Europeans have a bleak view of their personal finances. This situation has been further aggravated by the war in Ukraine. The cost of living is now the number-one concern in all the countries studied and among all different population segments in society.

In dealing with these economic challenges there are very different traditions and experiences between countries in terms of economic management. Some countries are more free-market oriented (e.g.

Germany, Hungary and Poland), while others view state interventions in the economy more favourably (e.g. Italy, Romania and Spain). Despite these differences in economic models there is generally a high level of trust in the EU as the coordinating body for economic management. In most countries this trust in the EU's economic management is higher than it is in their own governments. While people from different countries may disagree on their preferred model of economic management, they largely agree on the long-term economic priorities for the EU: protection of the common market from unfair competition from outside the EU and the guarantee of a high level of social protection.

The EU's economic recovery package has been largely positively received and people support a strong EU role in overseeing the use of its funds. However, there are substantial differences between countries in terms of priority areas for the spending of recovery funds. Regional cohesion, in particular, remains very important for several countries. It is also specifically important for Europeans with a Traditionalist mindset, who are most distrustful of what are perceived as invasive EU policies that impact their national identity and autonomy. While the EU is generally trusted in the economic domain, the prospect of the introduction of EU-level taxes could seriously undermine the EU's legitimacy. For Traditionalist Europeans, in particular, this could severely harm their view of the EU.

In North-Western Europe there is considerable fear of and resistance to the idea of a transfer union. Germany, the Netherlands and Sweden are the only countries where there is less trust in the ability of the EU to manage the economy compared to their own government or legal order. This finding is consistent with lower general trust in the EU in these countries. The populations in these countries are not necessarily against financial solidarity with other EU countries, but do show hesitance and restraint, while financial solidarity is taken for granted in the rest of Europe. However, the idea of conditionality and even the possibility of punitive action to enforce conditionality is largely supported, not only in North-Western Europe but throughout the Union.

## The future of EU common security

The war in Ukraine has had a big impact on how people look at their security. Before the outbreak of war, Russian foreign policy was very low down on the list of external threats (except among respondents from Poland). Since the war it has become the number-one threat in all member states and throughout European society. This goes together with growing concerns about geopolitical rivalry.

The war has strengthened the Western alliance. Trust in both NATO and the EU has gone up. Trust in the US, which had been seriously undermined in recent years, has been largely restored. Trust in Russia, but also in China, which was already very low, has further declined. The war has created a new focus on the priorities of the EU's common foreign policy. Ensuring peace and stability in Europe is clearly the number-one priority, while support for making sure that the EU can defend itself has grown. However, since the outbreak of war there has been little increase in willingness to extend these security guarantees to EU neighbours (with the exception of in Poland, where people are more willing to consider this).

Majorities in all countries support greater strategic autonomy and people have become more willing to back this up with more financial means for the military. This change of heart is most apparent in Sweden, where people feel exposed due to the country not being a NATO member. Support for becoming a NATO member surged overnight in the country and preparedness to do more in military terms has also increased on several fronts.

The war in Ukraine has not, however, solved all of the EU's problems in terms of its ability to stand more on its own legs in matters of common security. It has barely moved the needle on the willingness of people to let their nation's soldiers serve under an EU general from a different country. Moreover, people in France have become more hesitant to give up their permanent membership of the UN Security Council in exchange for the EU having a permanent seat. The war has also opened up the potential for a rift between the various EU countries bordering Ukraine. For Poland it has heightened Poles' already considerable assessment of the threat from Russia, and is fuelling a strong feeling of solidarity with Ukraine. Assessment of the threat posed by Russia has also increased in Hungary and Romania, but to a far lesser extent. Hungarians seem the most intimidated by the actions of Putin. This is borne out by the fact that the willingness of Hungarians to provide military support to another EU country if it were to come under attack, and if the attack was not likely to affect Hungary directly, has fallen by more than 20%.

## The future of joint climate action

Anxieties about both natural disasters and rising costs as a consequence of climate change run high in all the surveyed countries. The survey shows it is a stereotype that climate worries are only felt in Western Europe and that people in Central Europe do not care. Climate concern is substantial in Romania, Italy and Poland. However, it is also true that households in Central Europe are feeling the greatest impact of the rising energy costs on their household budgets. EU funds for the green transition may be able to mitigate (some of) these costs. This green part of the EU recovery programme is especially strongly supported by people in Poland.

Since the outbreak of war in Ukraine concerns about the rising cost of living have increased considerably. This has negatively affected people's willingness to pay more for the green energy transition. Even before the war there was a broad public consensus that climate costs should be kept under control and there was strong resistance to the idea of increasing taxes to pay for climate measures. These feelings are common both in North-Western Europe (where people are already weary of EU financial overreach) and Central Europe (where people are most worried about rising energy bills and higher taxes).

The European Green Deal is cautiously positively received by Europeans, with the most frequently mentioned associations being 'interested', 'positive', 'curious' and 'alert'. There are, however, a large number of Europeans who do not have any feelings about it, even after the policy programme was explained to them. There is a danger that climate policies could polarise attitudes between

different segments in society, and especially isolate the highly educated and socially liberal Creatives. Creatives stand out in their concern about climate change, which is viewed by them as an existential threat. While other segments of society are also worried about climate change, this is tempered by concerns about other issues, especially related to increased energy costs and higher taxes. These concerns are especially prominent among the more locally oriented and mid- and less-educated Traditionalists and Socialisers.

Economic progress and climate policies are not seen as contradictory. Rather, economic growth is largely viewed as a precondition for climate policies. There is also trust in technological solutions to climate change, especially in Central Europe. Climate change is primarily seen as a societal responsibility (rather than as an individual responsibility) and as a global responsibility (rather than an EU responsibility). The climate actions in EU foreign relations that are most supported are the inclusion of climate change provisions in future EU trade agreements and the levying of carbon taxes on products from countries that have low climate-protection standards.

## The future of EU values

The war in Ukraine has strongly reinforced the founding story of Europe as a peace project (i.e. the idea of no more war). On other EU values—freedom, democracy and human rights—there is also strong unity across both countries and population segments. Thus the Ukraine war in many ways has highlighted the core mission of the EU and shows that the EU has a very strong uniting story to tell.

However, people primarily identify as citizens of their country. In some countries (i.e. Germany and Belgium) local identities are also important. Traditionalists attach the most importance to their national identity, while the highly educated segments of Creatives and Achievers more often identify as European citizens too (but their national identity is still more important). Local ownership is viewed as especially important when it comes to the protection of cultural heritage. While people do see that the EU has a role to play here, it is primarily local governments, followed by national governments, that are seen as being in the driving seat for the protection of cultural heritage.

This unity about EU values extends to the topic of the rule of law. People across countries and segments agree on the importance of respect for the rule of law (i.e. through having an independent judiciary, respecting human rights, respecting decisions of the Court of Justice of the EU etc.) being a minimum condition for membership of the EU. This includes the majorities of the populations in Poland and Hungary. Even punitive measures to enforce common EU rule of law standards are supported throughout the EU.

However, the survey also shows the limits of EU rule of law when it comes to using rule of law arguments to force common standards that run against majority opinions or values conflicts within EU countries. The hosting of refugees is one such policy red line set by countries in Central Europe, which has strong popular support. The war in Ukraine is affecting migration attitudes however. Mi-

gration is viewed as less threatening due to the new perspective of Ukrainians seeking refuge from war. It remains to be seen if this will result in a long-term change in attitudes towards migration. For some countries abortion and LGBT+ rights are other sensitive issues that are fought over in the national arena and provoke resistance among citizens to the enforcement of EU common standards.

## Conclusion and recommendations

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This truly is a study of EU unity in diversity and, in fact, is one of a kind. After many decades of a ‘permissive consensus’ in support of European integration from almost everyone, the ‘polycrisis’ of the 2010s—stretching across the financial, economic, social, migration and health dimensions—has for the first time ensured a massive diversification of positions about the present and future of the EU, some of them heavily critical of it. Unfortunately, our understanding of this process and of its implications has long been complicated by a tendency to interpret it based on simplistic polarities such as ‘Eurosceptics versus Europhiles’, ‘globalists versus nationalists’ or ‘anywheres versus somewheres’. Such polarities have had a massive influence on multiple levels. The future of Europe debate has largely been framed as a choice between more or less Europe, while the EU political system has come to be a contest between an alliance of mainstream forces defending the EU on the one hand, and an assorted coalition of hostile ‘populist’ elements from both the right and left loudly demanding change on the other. Anti-EU sentiments were—and, to a large extent, still are—explained as a nativist backlash against a consensus among EU elites about open borders, free markets and the rule of law.

Only gradually has an understanding that things are more complicated begun to emerge. We have started to fathom that there are not only two, but many different stances—‘tribes’, as an insightful study called them some years ago<sup>2</sup>—towards the EU and its integration project. Our research goes an important step further than previous ones, however, insofar as it uncovers how people’s values—which are deeper and more stable in time than the changeable views usually polled—shape different attitudes towards the EU’s future. In the past, it was grand ideological narratives that gave shape to political parties, as well as content and meaning to their competition for power in our democratic societies. Their terminal decline has resulted in the disarticulation of our political systems and the hollowing out of our democracies’ ideological substance, which has contributed to the crisis of democratic representation that we are all witnessing.

While the robust ideologies that structured societies proved to be transitory and will not be returning, values seem to represent a more permanent human fixture, based on innate ‘moral foundations’, which are given different emphases by different individuals and societies. This concept has been

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<sup>2</sup> T. Raines, M. Goodwin and D. Cutts, *Europe’s Political Tribes. Exploring the Diversity of Views Across the EU*, Chatham House (London, 2017).

used to explain differences in people's moral and political stances, giving a deeper grounding than previously suspected to the values cleavages that still structure democratic competition along the left/progressive–right/conservative axis.<sup>3</sup> This study shows that, at this point, European integration, too, is salient enough to shape a variety of different reactions based on people's values. This points to the need for (European) political parties to give adequate representation to this variety by differentiating their political offer on the future of the EU as much as possible. It is therefore only fitting that this research should be published by the Martens Centre, an independent think tank committed to the highest research standards, but also a political foundation affiliated to a European party.

Aside from this, the study contributes to a long-standing Martens Centre reflection on the future of Europe that started, through a number of closed-door workshops, as early as 2016, well before the EU's own official 'reflection' and more recent 'Conference'.<sup>4</sup> It was publicly launched by our manifesto *For a New Europeanism*, which called for stronger integration in defence, foreign policy and border control, while putting greater emphasis on decentralisation, national autonomy, economic reforms and cultural traditions.<sup>5</sup> It has been developed by contributors to our special Future of Europe series of papers, which have so far covered such diverse aspects as the different strands of European federalist thought, differentiated integration, how to build a European Defence Union, how to achieve a decentralised eurozone, and how to combine an effective EU migration and asylum policy with the necessary protection of subsidiarity and national prerogatives.<sup>6</sup> This has been our way of reconnecting with the tradition of anti-centralist federalism based on subsidiarity that arguably characterised European Christian Democracy from its founding fathers Alcide de Gasperi, Konrad Adenauer and Robert Schuman down to our founder Wilfried Martens. And it is our contribution to shaping a specifically centre–right approach to European integration and the future of Europe that should most appeal to the values segments of the EU population that are most inclined towards the centre–right, which this study identifies as a coalition of Achievers and Traditionalists.

The study's findings cannot be comprehensively summed up here and it will be each reader's task to discover and make the most of them in the following pages, based on his or her interests and needs. However, several political recommendations can be put forward on their basis.

*First, the EU should tap into all the political potential of its citizens' growing desire for unity.* While Europe's diversity remains breathtaking and should be cherished, there is a surprising consensus on the fundamentals of European integration. The results show that the EU's foundational story as a project of peace, democracy, freedom and human rights still commands widespread and

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<sup>3</sup> J. Haidt, *The Righteous Mind: Why Good People Are Divided by Politics and Religion* (New York: Vintage, 2012).

<sup>4</sup> This 'reflection' was officially launched in European Commission, *White Paper on the Future of Europe*, COM (2017) 2025 (1 March 2017) accessed at [https://ec.europa.eu/info/sites/default/files/white\\_paper\\_on\\_the\\_future\\_of\\_europe\\_en.pdf](https://ec.europa.eu/info/sites/default/files/white_paper_on_the_future_of_europe_en.pdf) on 5 April 2022.

<sup>5</sup> F. O. Reho, *For a New Europeanism*, Wilfried Martens Centre for European Studies (Brussels, 2017), accessed at <https://www.martenscentre.eu/wp-content/uploads/2020/06/future-europe-new-europeanism.pdf> on 5 April 2022.

<sup>6</sup> Papers can be accessed at <https://www.martenscentre.eu/publication/#future-of-europe>.

general support in virtually all member states and values segments. The ongoing Ukraine–Russia war and the resurgence of global geopolitical conflicts have only reinforced this. Moreover, there is a growing awareness across values segments that a strong and united Europe is a necessary shield against common external threats in a variety of areas, from security and climate change to the economy. This development renders the globalist versus nationalist framework obsolete when it comes to the future of Europe debate. If channelled intelligently, this emerging desire for unity can sustain the integration process going forward.

*Second, the EU should use the momentum created by the war in Ukraine to build an effective European Defence Union.* Citizens now see protecting the security of member states as the top priority of EU foreign policy, while the goal of strategic autonomy is embraced by majorities in all surveyed countries and is particularly strong among citizens with a Traditionalist or Achiever mindset. If this new momentum were to lead only to a revitalisation of the transatlantic alliance and NATO in its current format, the long-term vulnerability of which was revealed during the Trump presidency, it would be a wasted opportunity. The EU should also use it to start closing the huge gap between its repeatedly stated goal of strategic autonomy and the concrete actions that are needed to achieve it. However, important cultural challenges remain on this path, as shown by people’s reluctance regarding the possibility of soldiers from their country serving under a general from another EU country, or by the fact that support in France for the country to give up its permanent seat at the UN Security Council in exchange for an EU seat actually declined after the invasion of Ukraine.

*Third, the EU should help upgrade the social market economy for the twenty-first century.* Results show that the need for European unity against external threats is also felt in the economic domain. The most supported goal of European economic policy appears to be protection from ‘unfair competition’ from outside the EU, while the second most important is protection of the welfare state. It will be the difficult task of European policymakers to balance these fearful demands for protection with the commitment to market openness and economic competition on which our societies’ long-term prosperity ultimately depends. If successful, this balancing act will produce a new European social market economy that combines high levels of economic freedom and competitiveness with a fair amount of social protection and cohesion. This will also partly be affected by the ongoing discussions on reforming EU fiscal rules. This study confirms that there is strong resistance in North-Western European countries, such as the Netherlands, Sweden and Germany, to a possible transfer union. However, it also shows that opposition could be reduced through the imposition of enforceable conditionality rules, which are widely supported as a necessary complement to financial solidarity.

*Fourth, the EU should strike a realistic balance between an ambitious European Green Deal and people’s readiness to pay for it.* The results show overwhelming support for EU action against climate change, which is largely seen as a collective threat that cannot be dealt with at the national level. However, they also reveal that the rising cost of living is people’s central concern in all the surveyed countries and that people’s willingness to pay for the green transition has actually decreased

since Putin's invasion of Ukraine and the accompanying energy price spikes. Moreover, differences among values segments within societies on this issue appear notable. Many socially liberal Creatives, the dominant values segment in EU institutions, see climate change as an existential threat that should be quickly addressed no matter the cost. Most other values segments, however, are much more concerned with the costs and take a more pragmatic cost–benefit approach to tackling climate change. European institutions have to bear in mind the serious risk that this difference in values could create a polarised conflict in the future. A realistic approach to the green transition—mindful of the state of public opinion and of social and economic conditions in different member states, as well as favouring business-friendly solutions and investments in research and technology—seems advisable.

*Fifth, the EU should respect cultural differences in values and morality.* The results show overwhelming support in all the countries surveyed, including Hungary and Poland, for the EU to forcefully sanction violations of the rule of law as a minimum and necessary requirement of EU membership. However, they also show that there are limits to EU citizens' consensus about unity and caution against EU activism in the field of 'morality politics' (e.g. family values). EU activism on such issues risks mobilising—and in fact, to some extent, has already mobilised—political conflicts along otherwise latent EU values cleavages. Here values diversity across the Union continues to be high, and the potential for backlash from the more conservative member states and values segments—which represent democratic majorities in some countries, while they are typically a minority in EU institutions—is significant. This is the case for traditional family values in Central Europe, but is also true of individual pleasure-seeking lifestyles, which dominate in many north-western countries but are much less common in the rest of the Union, where more spiritual lifestyles remain important. To maximise effectiveness and popular support, therefore, EU action should leave morally loaded and culturally divisive questions to member states as much as possible.

*Sixth, the EU should re-incorporate national and local patriotism within its narrative of supranational unity.* As mentioned, one of the most important results of this study is that it discredits the 'globalist versus nationalist' polarity as an accurate framework for explaining stances towards the EU. The 'Kyiv moment' confirms how EU membership can be seen as, and act as, a guarantor of national identity and independence, thus marking the end of the 'Brexit moment', when secession from the EU appeared to be the only way to assert these values. In fact, all EU members from Central and Eastern Europe had already experienced a similar realisation after the fall of the Iron Curtain. The results confirm that trust in the EU and national pride often go together. This shows that there is a way towards a non-exclusionary, multilevel patriotism in the EU that could, among other things, contribute to further deflating right-wing Euroscepticism. The EU has a chance to profile itself not as a post-national project, but as a post-nationalist one; and not only as a guarantor of its member states' security but also as a protector of their integrity, autonomy, independence and identity.<sup>7</sup> It should seize this opportunity.

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<sup>7</sup> See also F. O. Reho, 'Subsidiarity in the EU: Reflections on a Centre–Right Agenda', *European View*, 18/1 (2019), 6–15, doi:10.1177/1781685819843248.

*Finally, the future of EU democracy lies in strong European political parties.* This study shows that people's stances about the future of Europe are richly diversified and rooted in the relatively stable values segments and cleavages that make up our societies. This casts doubt on the possibility of bolstering EU legitimacy through new forms of deliberative democracy such as the Conference on the Future of Europe. By purposely abstracting politics from the organised representation of values, deliberative processes are unlikely to significantly improve EU democratic legitimacy.<sup>8</sup> Moreover, they are bound to magnify the voices of citizens with Creative and, to a lesser extent, Achiever mindsets, while marginalising those with Socialiser or, especially, Traditionalist mindsets, who are much less likely to engage. Better EU democracy requires the organised representation of values differences by stronger European parties that are better embedded at the national and local levels. It also requires that the mainstream political parties compete more forcefully with each other based on alternative visions of the future of Europe that better represent the different values segments of our societies and facilitate EU citizens' participation.

We sincerely hope that the evidence and insights presented in the following pages will be a valuable contribution to the ongoing future of Europe debate. May they contribute to the emergence of a more effective and democratic Europe that takes seriously the need both to reinforce its necessary unity and to protect its beautiful inherited diversity.

## Main survey findings

This report is a cooperative effort between the Martens Centre and the global research agency Globalities, which is based in the Netherlands. The report looks at the future of Europe from two perspectives, the first of which concerns culture and values. The EU is home to a great many cultures and values. Thus, reflecting on the future of Europe requires a deep understanding of the diversity of viewpoints across the continent. The second perspective from which the report examines the future of Europe is that of policy challenges. The report focuses on the economy, external security, climate change and values/rule of law, four policy areas in which the EU could make a real difference to people's futures.

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<sup>8</sup> C. I. Accetti and F. O. Reho, 'The Conference on the Future of Europe as a Technopopulist Experiment', *Review of Democracy*, 22 March 2022, accessed at <https://revdem.ceu.edu/2022/03/22/the-conference-on-the-future-of-europe-as-a-technopopulist-experiment/> on 5 April 2022.

The report is based on four data sources. The first and second of these are the Glocalities annual values surveys conducted in January and February of 2020 and 2021. Many of the results of these two studies have been included in the report, particularly those on the diversity of values within Europe. The third source of data is a bespoke survey on European policy challenges that was specifically carried out for this report. Involving 5,503 respondents, it was conducted in November and December 2021. Unless indicated otherwise, the data presented in this report comes from this survey. In March 2022 Glocalities reran part of the bespoke survey to assess the impact of the war in Ukraine on people's view on the future of EU common security. This survey, which involved 4,715 respondents, is the fourth data source. The first, third and fourth surveys were carried out in 10 EU countries that together represent the maximum diversity in terms of geography and values in the EU. These countries are Belgium, France, Germany, Hungary, Italy, the Netherlands, Poland, Romania, Spain and Sweden. The second survey was conducted in all of these same countries except Hungary.

Concerning the data tables in this report, when the results for a specific country (or values segment, on which see below) differ significantly from those of other countries (or values segments), results that are considerably higher are presented in red and those that are markedly lower, in green.<sup>9</sup>

## 1. Cultural diversity between EU countries

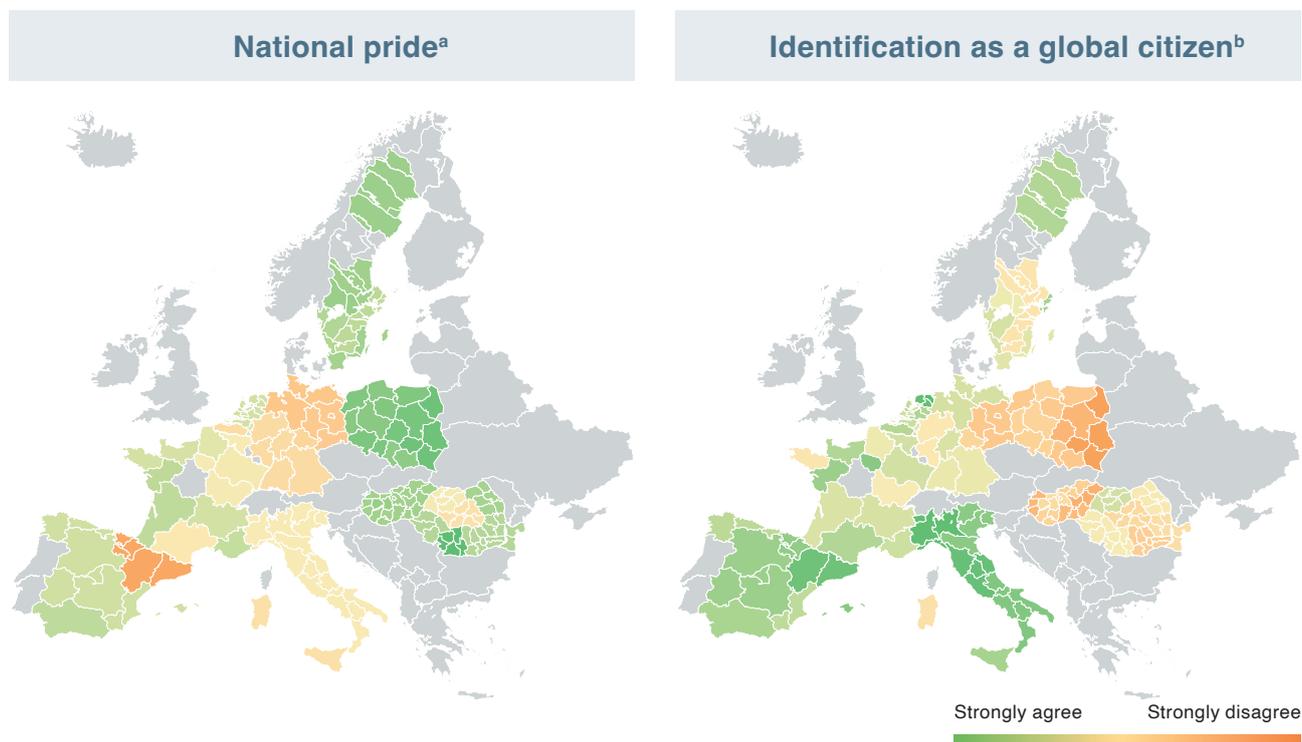
Europe is a continent rich in cultural diversity and values plurality. For this study we started by mapping some of Europe's most distinctive cultural cleavages by geography. Glocalities' Global Values Survey includes 80 statements about people's fundamental values and belief systems. Based on these statements, four main cultural cleavages can be identified on the map of Europe. These cultural cleavages reflect the different historical experiences and sensitivities in the geography of Europe. They provide the different cultural lenses through which people from different areas look at the future of Europe.

The first cultural cleavage is between nationalism (represented by those who have high national pride) and cosmopolitanism (represented by those who identify as a global citizen) (see Figure 1.1). South-west Romania is the region that scored highest for national pride (87% are proud of the national flag), while the Basque country in Spain scored the lowest (29% are proud of the national flag). Nationalism is more important in Sweden, Central Europe and Spain, and least important in Germany, Italy and the eastern part of France.

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<sup>9</sup> Statistical significance was assessed by calculating a Chi-square with a 95% confidence interval.

**Figure 1.1 Nationalism versus cosmopolitanism**



Source: Glocalities, 2020 Global Values Survey.

Notes: Based on 17,048 respondents aged 18–70 years. The colours indicate the extent to which people agree or disagree with the selected statements (based on standardised scores).

<sup>a</sup> Original statement: 'I am proud of the flag of <respondent's country>.'

<sup>b</sup> Original statement: 'I consider myself more a world citizen than a citizen of the country I live in.'

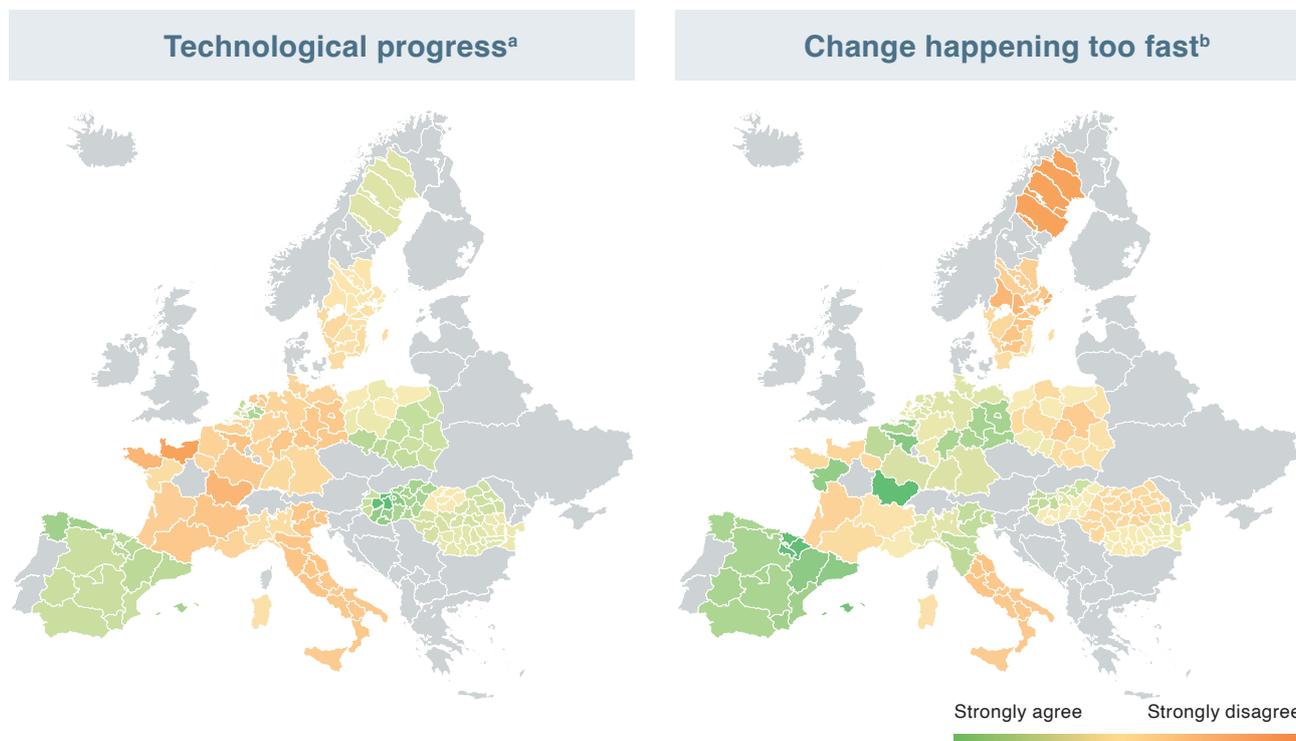
History explains much of the high national pride in Poland, and the contrasting low national pride in Germany. This sensitivity is reflected in national identity being an important flashpoint between different regions in Spain.

Identification as a global citizen tends to be higher in regions where national pride is lower, but not always. Southern Italy scores the highest for the idea of a global village (56%), while Western Transdanubia in Hungary scores the lowest (15%). Spain combines strong national pride in most regions with a generally stronger cosmopolitan identity. Southern Europe in general tends to be more cosmopolitan than the rest of Europe.

A second cultural cleavage in Europe is between those who believe in technological progress (who think that technology will solve many problems in the future) and those who are averse to change (who think such change in society is happening too quickly). In north-west Spain most people believe that many problems in the future will be solved by technology (86% agree), while Normandy in France scores the lowest (only 37% agree). Belief in the success of technological progress is much higher among countries that joined the EU later (i.e. Hungary, Poland, Romania, Spain and Sweden)

than among the EU's foundational member states (i.e. Belgium, France, Germany, Italy and the Netherlands). This higher score for belief in the benefits of technological progress in 'new Europe' goes together with a generally higher willingness to take risks in life.

**Figure 1.2 Belief in technological progress versus aversion to change**



Source: Glocalities, 2020 Global Values Survey.

Notes: Based on 17,048 respondents aged 18–70 years. The colours indicate the extent to which people agree or disagree with the selected statements (based on standardised scores).

<sup>a</sup>Original statement: 'Many problems will be solved in the future through technology.'

<sup>b</sup>Original statement: 'Everything is changing too often and too fast.'

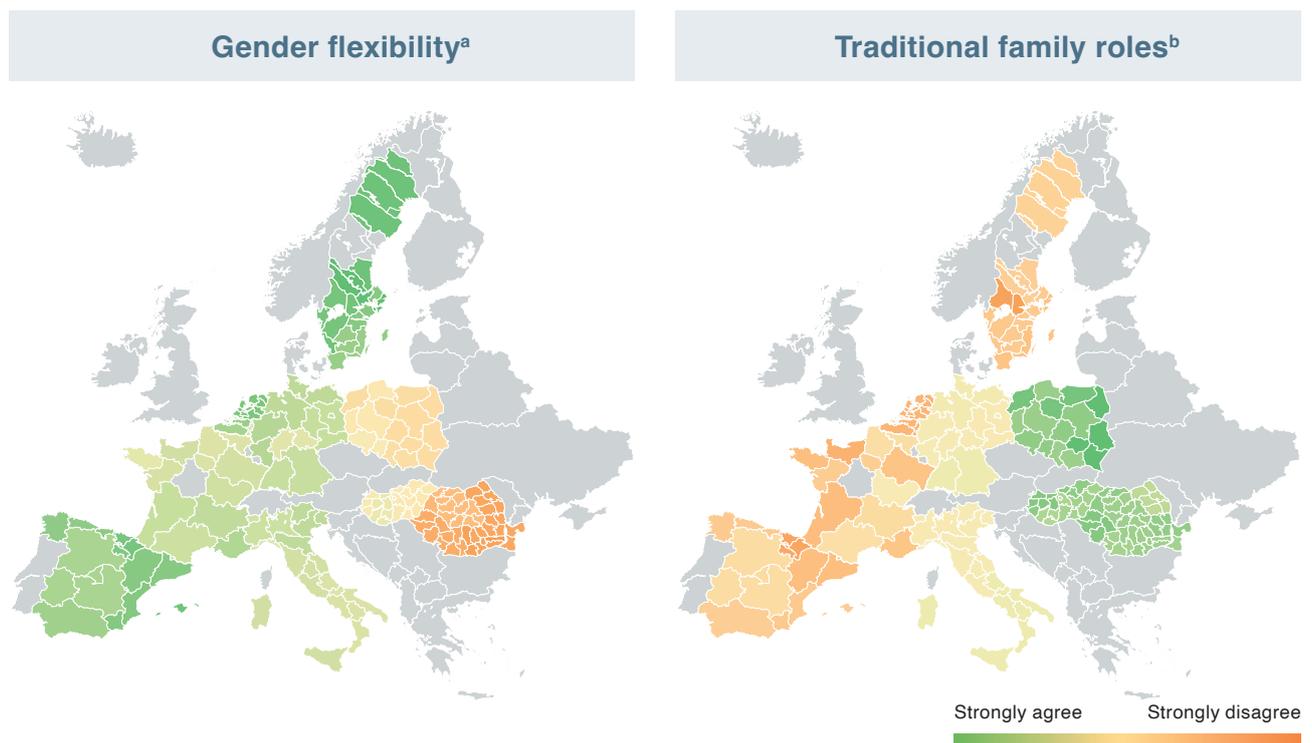
The opinion that changes are happening too quickly follows the same pattern. People in most older EU member states believe that change is happening too rapidly, while those in newer member states tend to be more open to change (with the exception of Spain). The highest score is in the Basque country in Spain, where 72% of the people believe that change is happening too fast, while the region of Ovre Norrland in Sweden is the least change averse (30%).

A third cultural cleavage in Europe is between acceptance of gender flexibility (non-traditional expressions of gender) and belief in the importance of traditional family values (where the man is the head of the household). This creates the sharpest cultural divide on the map of Europe, and differentiates Central Europe from the rest of the EU. In Poland, Hungary and Romania traditional family values are very important. In the survey this is measured by the statement 'the father should be the head of the household'. In Central Europe between 50% and 60% of the population agrees with this statement (the highest score is in southern Romania, where 63% agree), while in the rest of Europe

this percentage is around 15% (and is the lowest in Norra Sverige in Sweden with 8%). By contrast, in Western Europe people tend to find it perfectly acceptable for men to express their feminine side (this acceptance is highest in eastern Spain with 79%), while in Central Europe traditional expressions of gender prevail (the lowest score for gender flexibility is in southern Romania with 23% accepting it).

This cultural division often plays out in Central European countries' resistance to EU interventions in the domains of culture and family values.

**Figure 1.3 Acceptance of gender flexibility versus traditional family roles**



Source: Glocalities, 2020 Global Values Survey.

Notes: Based on 17,048 respondents aged 18–70 years. The colours indicate the extent to which people agree or disagree with the selected statements (based on standardised scores).

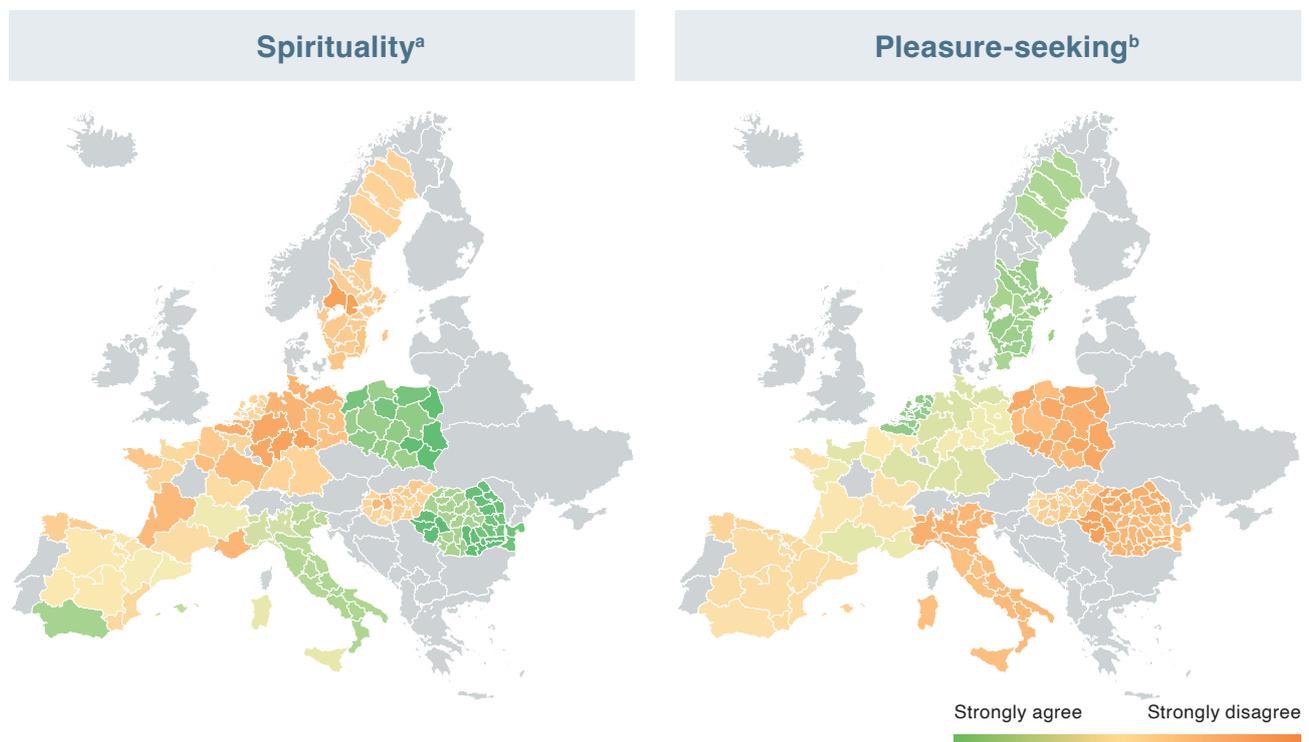
<sup>a</sup>Original statement: ‘I think it is perfectly all right for men to show their feminine side.’

<sup>b</sup>Original statement: ‘The father should be the head of the household.’

The fourth and final cultural cleavage in the EU with geographical significance is that between spiritual and pleasure-seeking lifestyles. Spirituality is an important part of life in Poland, Romania, Italy and southern Spain, while elsewhere, especially in North-Western Europe, spirituality is much less important in life compared to the past. Hungary stands out as an anomaly, as spirituality is much less important there than in other Central European countries. North-east Romania scores the highest for spirituality (63%), while Central Transdanubia in Hungary scores the lowest (16%).

The spiritual philosophy of life is largely replaced in North-Western Europe—especially in the Netherlands and Sweden—by an emphasis on personal enjoyment and happiness. In the north of the Netherlands 78% of people find that their most important aims in life are to have fun and enjoy themselves, while in the north-east of Italy only 21% agree. These cultural differences largely explain the emphasis on the personal norm of self-actualisation and the utilitarian arguments used in Scandinavian countries and the Netherlands, which contrast with the religious norms and the moral foundation of sanctity<sup>10</sup> that play an important role in many other parts of Europe (especially in Central and Southern Europe).

**Figure 1.4 Importance of spirituality versus a pleasure-seeking lifestyle**



Source: Glocalities, 2020 Global Values Survey.

Notes: Based on 17,048 respondents aged 18–70 years. The colours indicate the extent to which people agree or disagree with the selected statements (based on standardised scores).

<sup>a</sup>Original statement: ‘Spirituality is an important part of my life.’

<sup>b</sup>Original statement: ‘My most important aims are to have fun and enjoy myself.’

## Mapping EU trust

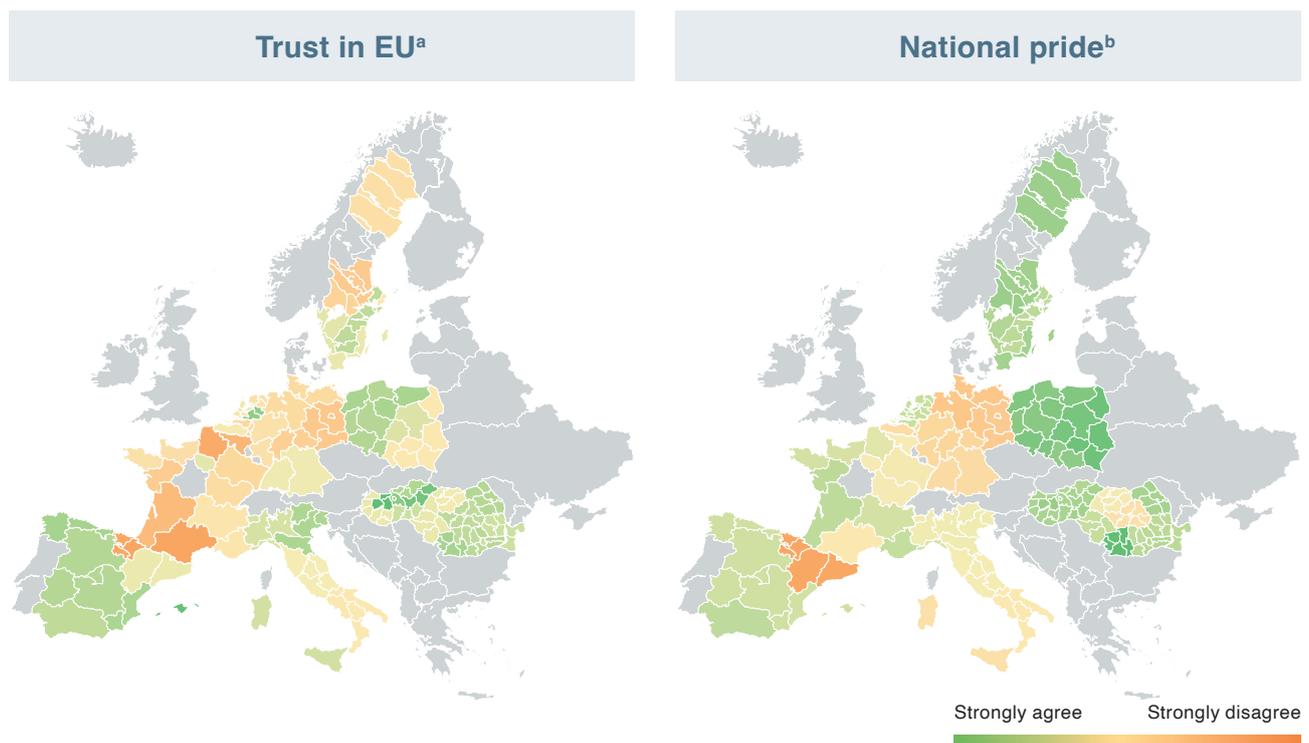
Trust in the EU also differs highly by geographic area. The EU is most trusted in Central Europe and Spain, while trust in the EU is lowest in France, Germany, Belgium and parts of the Netherlands, Sweden and Italy. The highest trust in the EU is found in Central Transdanubia in Hungary and south-west

<sup>10</sup> Sanctity/degradation is one of the five moral foundations of human moral reasoning developed by the psychologists Jonathan Haidt, Craig Joseph and Jesse Graham (see [www.moralfoundations.org](http://www.moralfoundations.org)).

Romania (62% trust the EU), while trust is lowest in Hauts-de-France in France (22% trust the EU). In terms of differences within countries, it is interesting to see the east–west divide in Poland when it comes to trust in the EU. Similar differences are visible in Germany, Spain, Italy, Sweden and Romania.

Trust in the EU is higher in regions and countries where national pride also tends to be high, as we noted previously (see Figure 1.1). At first glance these results seem contradictory, based on our common understanding of EU attitudes as being dominated by proponents of either more EU centralisation or more national sovereignty. In Central Europe in particular, the political reality is much more nuanced and rooted in the distinct political history of European integration. In Central European countries—very much as in Ukraine now—nationalism emerged in opposition to the imperialist aggression of the Russian and formerly Soviet state. Therefore European integration is, for these countries, a guarantee of national sovereignty and liberty. On the map of Europe a high score for nationalism is therefore not a proxy for anti-EU sentiment, but the opposite. The presumed cleavage between EU federalists and national populists is thus far more nuanced than often supposed.

**Figure 1.5 Geography of trust in the EU and national pride**



Source: Glocalities, 2020 Global Values Survey.

<sup>a</sup>Original statement: ‘Please indicate your general trust in the following institutions: EU – Yes, I have trust; No, I don’t have trust; Don’t know’.

<sup>b</sup>Original statement: ‘I am proud of the flag of <respondent’s country>.’

Notes: Based on 11,561 respondents aged 18–70 years. The colours indicate the extent to which people trust the EU.

## 2. Values diversity within European societies

Country diversity is only one dimension of viewpoint diversity in Europe. Country diversity hides the often strongly diverging citizen perspectives within countries. Therefore to explore viewpoint diversity some EU studies classify Europeans based on their attitudes towards the EU.<sup>11</sup> A disadvantage of this approach is that these attitudes may change over time and most people do not have strong opinions about the EU as it is just not part of their daily life. Instead of looking at attitudes towards the EU, this study differentiates between groups of Europeans based on their values. Values are generally formed when people are in their early twenties and remain remarkably stable throughout life. The Glocalities segmentation model used in this report has been developed through six waves of global fieldwork that have taken place since 2013. The model assigns people into values clusters, also called segments, based on their answers to 50 questions about their fundamental values orientations in life (e.g. level of agreement with the statement ‘the father should be the head of the household’).

The Glocalities model consists of two fundamental dimensions which are based on factor analysis and are highly explanatory for values differences between population segments:

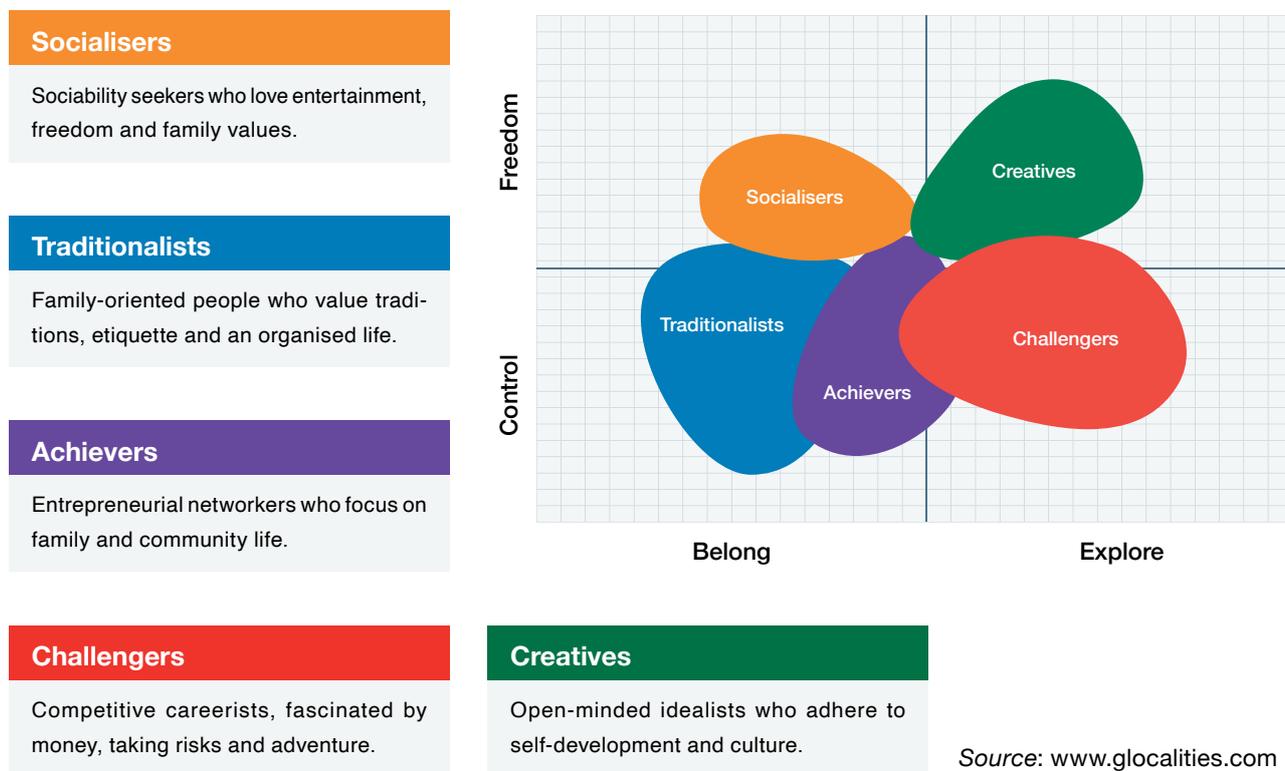
- The horizontal axis is a psychological dimension. This dimension shows whether people are focused on a sense of belonging and familiarity or whether they are more exploration- and change-oriented.
- The vertical axis is a sociological dimension. This dimension shows whether people are more focused on control and obedience or whether they are more oriented towards the freedom to make individual choices.

The five values segments occupy five distinct areas in the model. These segments are based on a cluster analysis (latent class analysis) of a set of values statements from the survey. The values segments are present around the globe and differ in size between countries.

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<sup>11</sup> See, for example, Raines, Goodwin and Cutts, *Europe's Political Tribes*.

**Figure 2.1 Glocalities values segmentation model**

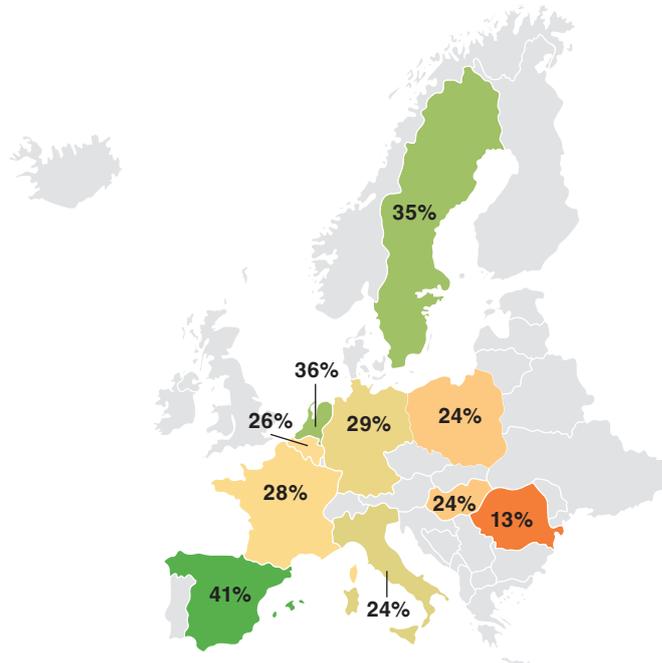


*Creatives: openminded idealists who adhere to ideas of self-development and culture (cosmopolitan, self-expression, social commitment, art and culture)*

Creatives are people with a strong focus on freedom and exploration. They are open-minded idealists who believe in social change. They challenge social norms about the roles and expectations of both genders. Their open-mindedness also translates to a strong belief in freedom of self-expression. They are cosmopolitan by nature and always eager to experience new things. They value self-development and they have a tendency to look beyond their immediate environment. They believe that getting acquainted with other cultures will help them broaden their horizons. For Creatives, the world is a global village: distances have been minimised and everything is interconnected, allowing the exchange of culture and ideas.

Creatives have above-average trust in the EU. They also have trust in the parliament and legal system of their own country, as well as in intergovernmental organisations such as the UN. However, they are more distrustful of the military, multinationals and religion. Policy concerns that stand out among Creatives are health and elderly care, social welfare, environment/climate change and the rule of law. The latter is also connected to the fact that they want more respect for human rights and democracy in the EU. They tend to be over-represented among left-wing, social-liberal and green party voters. Creatives are highly politically engaged and like to express their political opinions to others. People with a Creative mindset are therefore often over-represented in politics and deliberation.

**Figure 2.2 Distribution of Creatives segment among 10 EU countries**



Source: Glocalities, 2020 Global Values Survey.

Note: Based on 14,060 respondents in 10 EU countries.

Creatives are present in all age groups, not especially among the youth, as is often assumed. They are over-represented among the higher educated. The Creative mindset is dominant in EU policy circles. In Glocalities workshops for EU institutions and think tanks, 80%–90% of the attendees usually fall into this values segment (people can complete a values survey in advance of Glocalities workshops). Overall, Creatives represent about one in four Europeans, but in some countries, especially Spain, Sweden and the Netherlands, the share of Creatives is larger. Creatives also represent large population segments in Central European countries, although there are significantly fewer in Romania.

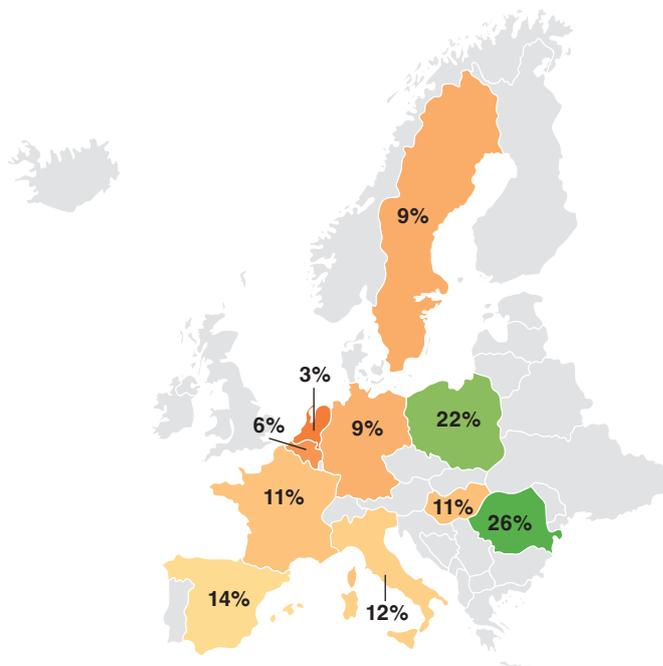
*Achievers: entrepreneurial networkers who focus on family and community life (goal oriented, helping others, family, status)*

Achievers are also a more cosmopolitan segment, over-represented among the higher educated. For Achievers competition, risk-taking and entrepreneurship are important values. They are status-oriented networkers, who set ambitious goals and are willing to work hard to reach them. Achievers have a materialist attitude and a strong belief in the benefits of technological progress. They balance an open and cosmopolitan mindset with a strong attachment to family, local community and the nation. Progress and control go hand in hand for Achievers. Respect and hierarchy are important values.

Achievers generally have high levels of trust in the EU, as well as in other international and local institutions. Issues pertaining to security and fighting terrorism are prioritised by Achievers. The overarching aspiration of Achievers for the EU is economic progress, which is not surprising given

that they are very entrepreneurial. Achievers are over-represented among the voters of (centre-) right and conservative liberal parties. Achievers are also highly politically engaged, but are more naturally more involved in business networks than in governmental policy networks (unless their interests are at stake).

**Figure 2.3 Distribution of Achiever segment among 10 EU countries**



Source: Glocalities, 2020 Global Values Survey.

Note: Based on 14,060 respondents in 10 EU countries.

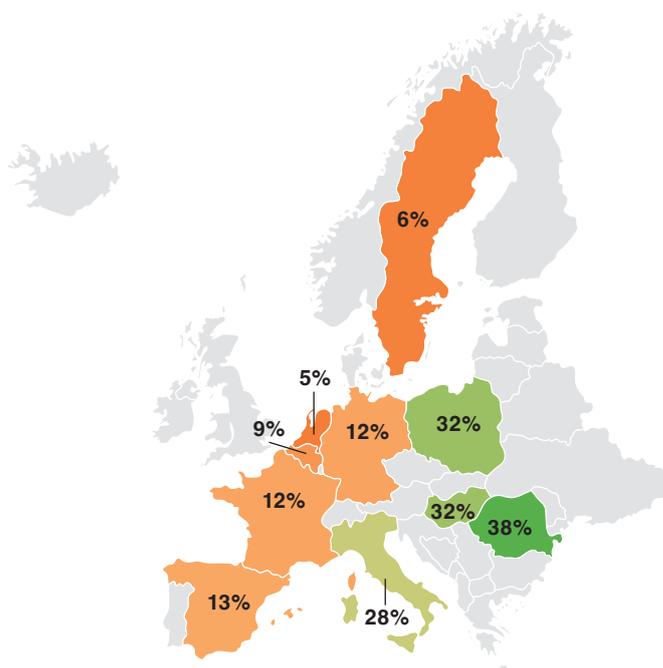
Achievers are over-represented among younger Europeans (18–34), men and the higher educated. They often work full time or are self-employed (entrepreneurs). Achievers make up approximately 1 in 10 Europeans. In Poland and Romania, however, they form a much larger part of society, about one in four, making the segment similar in size to or even larger than that of Creatives.

*Traditionalists: family-oriented, status quo conservatives who value traditions, etiquette and an organised life (patriarchy, family, commitment, traditional)*

Traditionalists tend to be locally and family oriented. A structured and predictable life is important to them. They tend to be very proud of their country and feel attached to their traditions, established relationships and their home (the German word *Heimat* best represents this geographical attachment). Their desire for order and structure makes them generally risk-averse. They strongly believe in traditional values and proper social etiquette. They adhere to traditional family roles and the principle of hierarchy, and religion often plays an important part in their life. Sobriety, loyalty and compassion are virtues that are important to them.

In general they tend to be more distrustful of (national) political institutions, the media and non-governmental organisations, which are all perceived as being far removed from their daily life. This also extends to the EU. They place more trust in religious institutions, but also in institutions such as the military and local companies. Their main concerns often have to do with safety, crime, terrorism and immigration, but also with health and what they perceive to be a lack of proper values. Politically they tend to be over-represented among conservative parties and parties on the radical/populist right. While they are community oriented and they often vote, they tend to be more passively involved in politics. This group is often under-represented in policy deliberation.

**Figure 2.4 Distribution of Traditionalist segment among 10 EU countries**



Source: Glocalities, 2020 Global Values Survey.

Note: Based on 14,060 respondents in 10 EU countries.

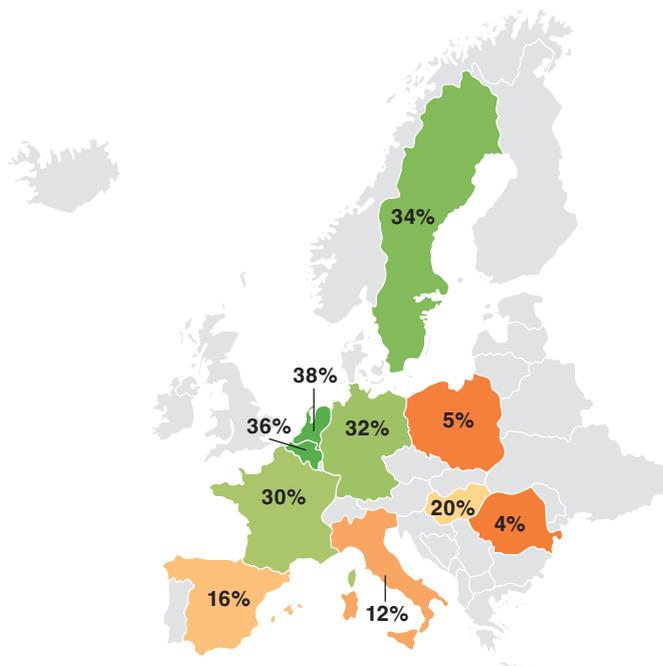
Traditionalists are over-represented among older (45+), mid-educated and married people living in rural areas or small towns. In many Northern and Western European countries, traditionalists make up around 1 in 10 people, but in Central Europe and Italy they form a much larger values segment, representing around 1 in 3 people in society.

*Socialisers: sociability seekers who love entertainment, freedom and family values (freedom, family, entertainment, security)*

Socialisers love freedom, entertainment and family. Socialisers have their sense of belonging and local orientation in common with Traditionalists. However, they are much more materialistic, and are non-traditional and more secular in their orientation. They are not afraid to take risks and are open to making different decisions in life, even if these do not prove to be beneficial in the long run. They

are generally disappointed with society around them, as they feel that most people out there are too self-absorbed and do not consider others as much as they should. Family is important to them and they make enough time for it, but they are not necessarily attached to traditional family roles. Socialisers value freedom of expression and are perfectly comfortable with behaviours that deviate from traditional norms in society.

**Figure 2.5 Distribution of Socialiser segment among 10 EU countries**



Source: Glocalities, 2020 Global Values Survey.

Note: Based on 14,060 respondents in 10 EU countries.

Socialisers share a lot of political concerns with Traditionalists. They worry about migration, safety, crime and terrorism. They are generally distrustful of institutions, including religious ones. They have below average trust in the EU. They are over-represented among non-voters and the voters of populist parties (both left and right). They are generally less politically involved and more often feel betrayed by politicians. It is harder to include them in political deliberation.

Socialisers are over-represented among lower educated, older people (45+) and people living in suburban and rural areas. Socialisers are strongly over-represented in North-Western European countries, where they make up one in three people, while in much of Southern and Central Europe they represent a much smaller part of society.

*Challengers: competitive careerists, fascinated by money, risk taking and adventure (career, having fun, spending, improving status)*

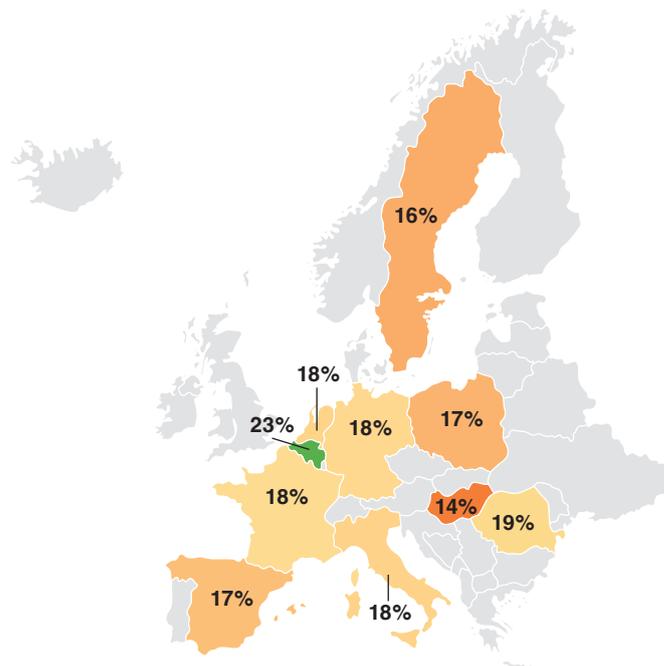
Challengers have a strong desire for power and status; just like Achievers, they are very competitive. In contrast with Achievers however, they are much more frustrated by their lack of social mo-

bility and are more often struggling to achieve their aspirations in life. Continuously improving their status is their top priority and they are very materialistic. They are fascinated by kicks and thrills, which they associate with action and a sense of being alive.

In political terms, Challengers tend to be very pragmatic and non-ideological. They are generally less interested in politics. Political concerns that do stand out for them are freedom of choice and migration. They are very individualistic and, as a result, are less community oriented and moralistic. They have average trust in the EU, while they are generally less trustful of institutions (due to their more individualistic attitude). On the other hand, they tend to be more trustful of multinational companies. They are more difficult to engage politically, because politics generally does not align with their lifestyle and interests.

They are over-represented among non-voters, and are not particularly represented by any specific party. Challengers are over-represented among young (18–34) men and make up about one in five citizens. They are slightly over-represented in Belgium and under-represented in Hungary, but in general there are no large geographical differences.

**Figure 2.6 Distribution of Challenger segment among 10 EU countries**



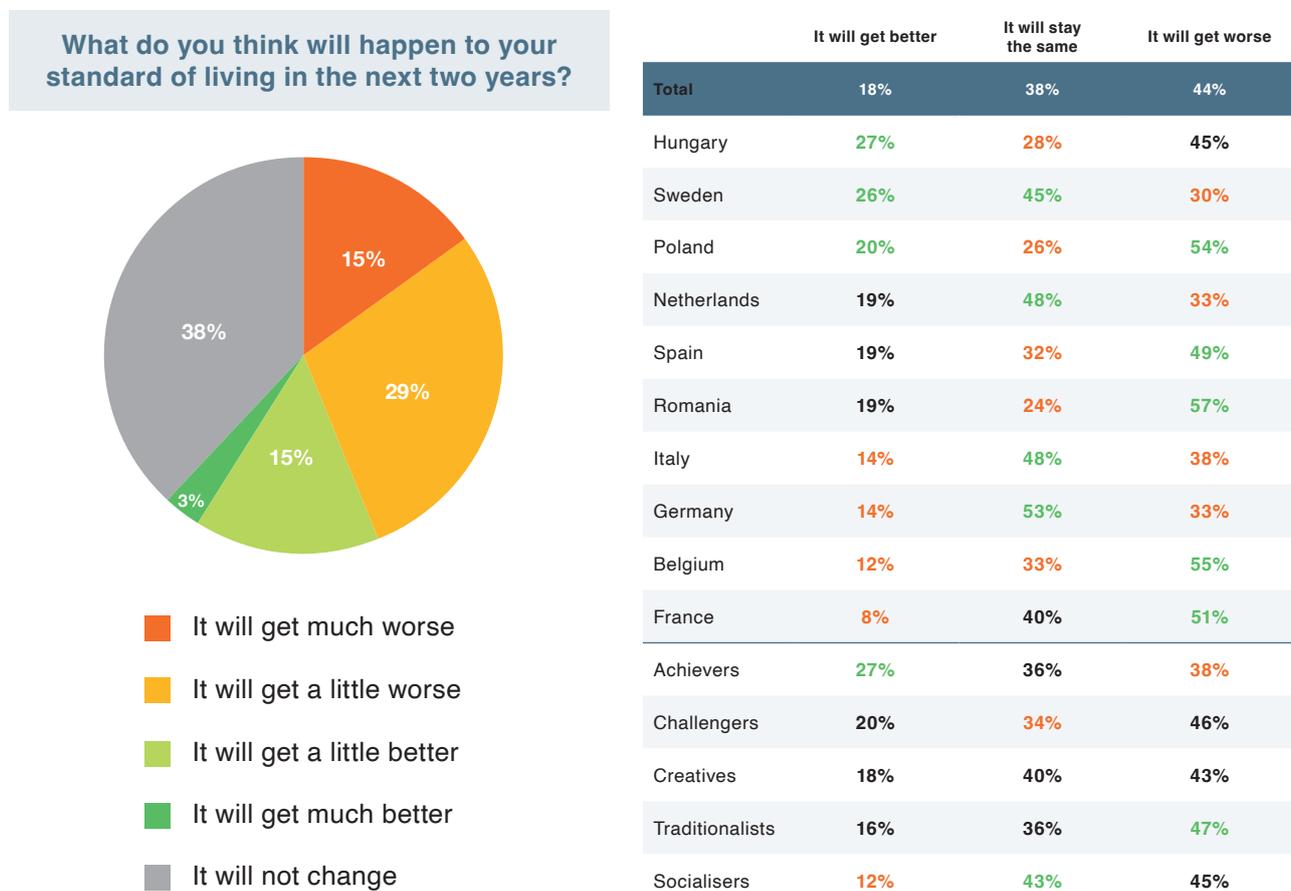
Source: Glocalities, 2020 Global Values Survey.

Note: Based on 14,060 respondents in 10 EU countries.

### 3. The future of the European economy

In the wake of the COVID-19 crisis most Europeans have a bleak outlook regarding their personal finances. Even in November and December 2021 many Europeans had gloomy personal economic prospects. Of the people in the 10 EU countries surveyed, 44% expected their personal standard of living to get worse in the next year, while only 18% believed it would get better. The countries where people had the most negative outlook were France, Belgium and Romania, while people in Hungary and Sweden were the most positive. Achiever-oriented Europeans were more positive about their economic prospects, while Traditionalists were the most negative.

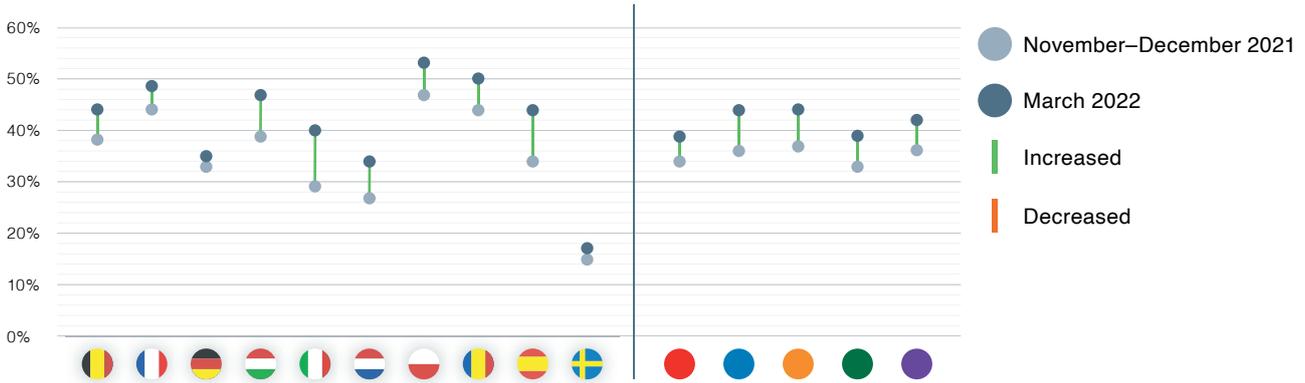
**Figure 3.1 Expected changes to personal economic situation**



Note: Due to rounding, some percentages do not sum to 100%.

Since December this situation has further worsened due to rising energy prices and the economic consequences of the war in Ukraine. This is reflected in a steep rise in concern about the cost of living. In our first survey, in November–December 2021, this was already the top concern in many countries on an EU level. In our second survey, in March 2022, this concern had only become more urgent, with it now being the top concern in all the studied EU countries and among all population segments.

**Figure 3.2 Increase in concern about cost of living, November–December 2021 and March 2022<sup>a</sup>**



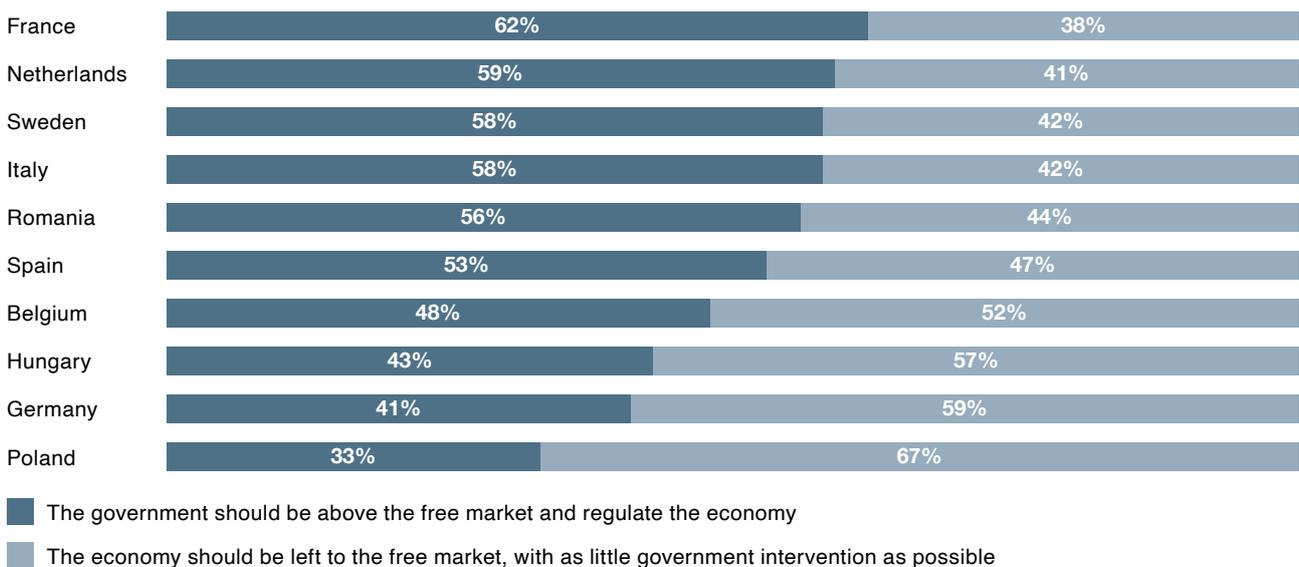
Note: Graph shows change in responses for the ‘cost of living’ option.

<sup>a</sup>Original question: ‘Which four of the following topics in the EU make you feel most worried?’

## Competing economic visions

In terms of how to best manage the economy and stimulate economic growth there are two main competing visions: the idea of a free-market economy and that of a more state-regulated economy. In the survey respondents were asked to choose which approach to economic management they preferred. The overarching results show how each of these economic visions has almost equal support in Europe, but also how support for each is very different in different countries. In France, the Netherlands, Sweden, Italy and Romania the idea of a state-managed economy is dominant, while in Poland, Germany and Hungary the idea of a free-market economy has more support. In Spain and Belgium the two ideas enjoy largely equal support.

**Figure 3.3 Preference for state-regulated or free-market economy, by country<sup>a</sup>**



Note: The graph excludes the response ‘Don’t know’.

<sup>a</sup>Original question: ‘People have different ideas on how the economy should be run. With which of the following arguments do you agree more?’

Alongside competing ideas on economic management, there is the question of which institutions should manage the economy. On average the EU, the business community and the European Central Bank are the most trusted, while (private) banks, national governments and national jurisdictions are trusted the least. However, there are once again very strong differences between countries.

Trust in the EU to manage the economy is on average more than 10% higher than trust in national governments. However, in Germany, the Netherlands, France and Sweden trust in national governments to manage the economy prevails. In Germany, the Netherlands and Sweden this trust in national economic management is backed by high levels of trust in the national legal system to manage the economy. This seems to reflect anxieties in these northern countries about the movement of the EU towards becoming a transfer union, in which they will have to foot the bill. These anxieties are driven by strong national sentiments much more than by different values in society.

**Figure 3.4 Trust in institutions to manage the economy, by country and segments<sup>a</sup>**

	The EU	Businesses (the free market)	The European Central Bank	The national legal system as represented by national courts and judges	The national government	Banks
<b>Total</b>	<b>46%</b>	<b>42%</b>	<b>40%</b>	<b>37%</b>	<b>35%</b>	<b>33%</b>
Belgium	38%	36%	36%	35%	30%	28%
France	34%	35%	36%	31%	35%	30%
Germany	44%	41%	36%	50%	48%	35%
Hungary	53%	43%	39%	40%	34%	30%
Italy	46%	44%	37%	28%	39%	29%
Netherlands	42%	42%	43%	52%	47%	36%
Poland	53%	54%	48%	23%	28%	44%
Romania	54%	45%	42%	29%	17%	38%
Spain	51%	44%	39%	32%	28%	22%
Sweden	40%	39%	41%	46%	42%	42%
Challengers	44%	42%	42%	37%	35%	33%
Traditionalists	36%	38%	31%	30%	29%	30%
Socialisers	40%	37%	33%	32%	28%	27%
Creatives	53%	41%	43%	37%	35%	30%
Achievers	53%	53%	48%	45%	44%	45%

Note: The table shows the percentage of those who say they trust each actor.

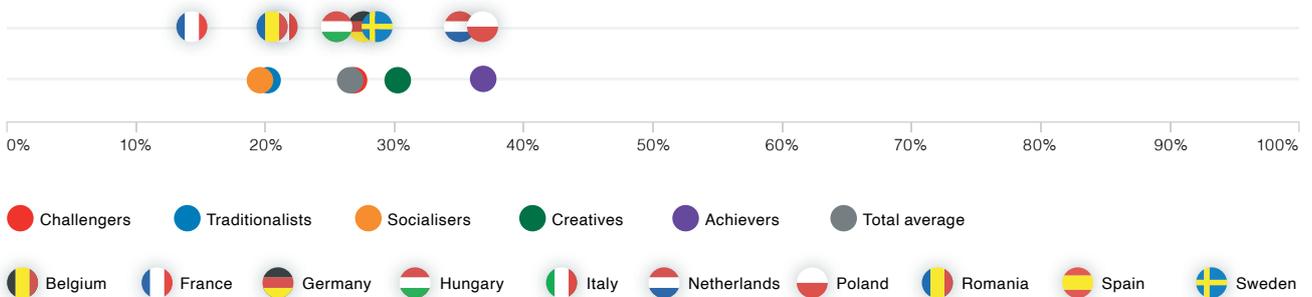
<sup>a</sup>Original question: 'Do you trust or distrust the following actors to manage the economy?'

The role of the EU in managing trade relations with other countries is also appreciated. Six out of 10 Europeans aged 18–70 are aware that the EU makes trade agreements with other countries. As a whole, these trade agreements are regarded as making a positive contribution to the national economy in most countries and among most segments in society. However in France, Italy and Romania the balance of EU trade is negative and more people believe that EU trade agreements have had a negative effect on their country’s economy. Among the more highly educated and cosmopolitan Creatives and Achievers, EU trade agreements are generally regarded as positive, while among the more locally oriented Traditionalists they are more often viewed as having a negative impact on the national economy.

**Figure 3.5 Perceived impact of EU trade agreements on national economies<sup>a</sup>**

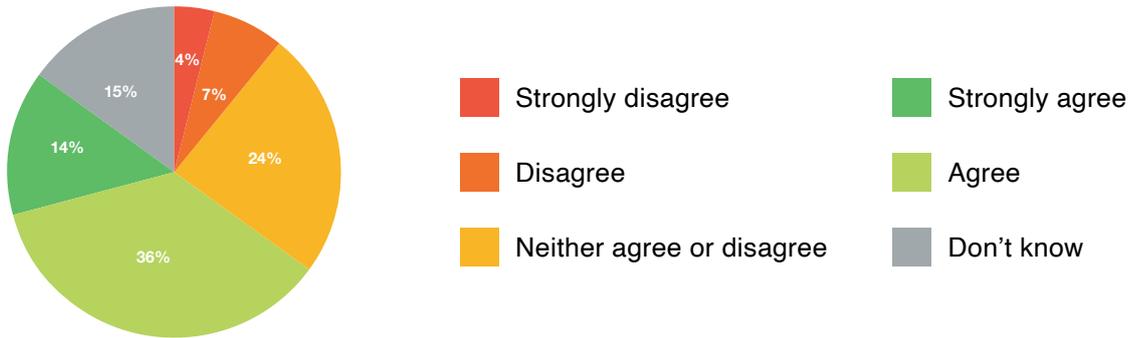


<sup>a</sup>Original question: ‘What do you think the impact of these trade agreements has been for the economy of your country?’  
Percentage responding ‘very positive’ or ‘mostly positive’ by country and segment:



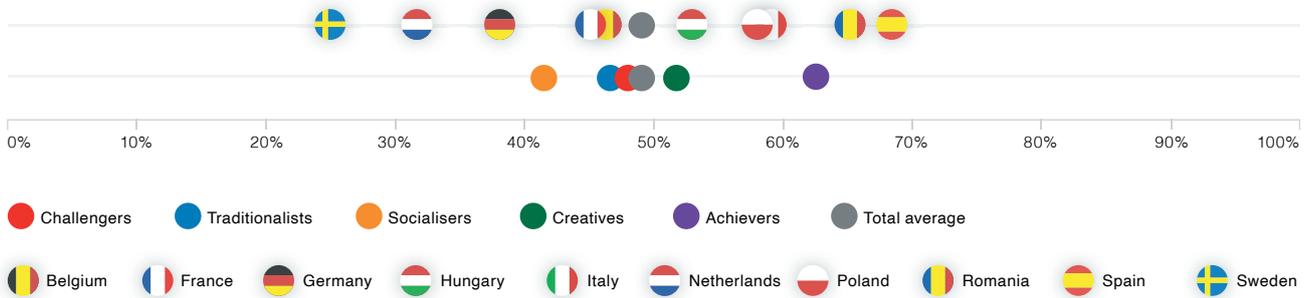
Overall a thin majority supports the further economic integration of the EU countries, although objections are only voiced by 1 in 10 Europeans. People in Spain and Belgium are the most supportive, while those from Sweden, the Netherlands and Germany are the most sceptical of further economic integration. This again seems to reflect Northern European concerns about a creeping transfer union. People with an Achiever mindset are particularly strong proponents of further EU economic integration, while opponents are more often found among the more locally oriented Traditionalists and Socialisers.

**Figure 3.6 Agreement with future EU economic integration<sup>a</sup>**



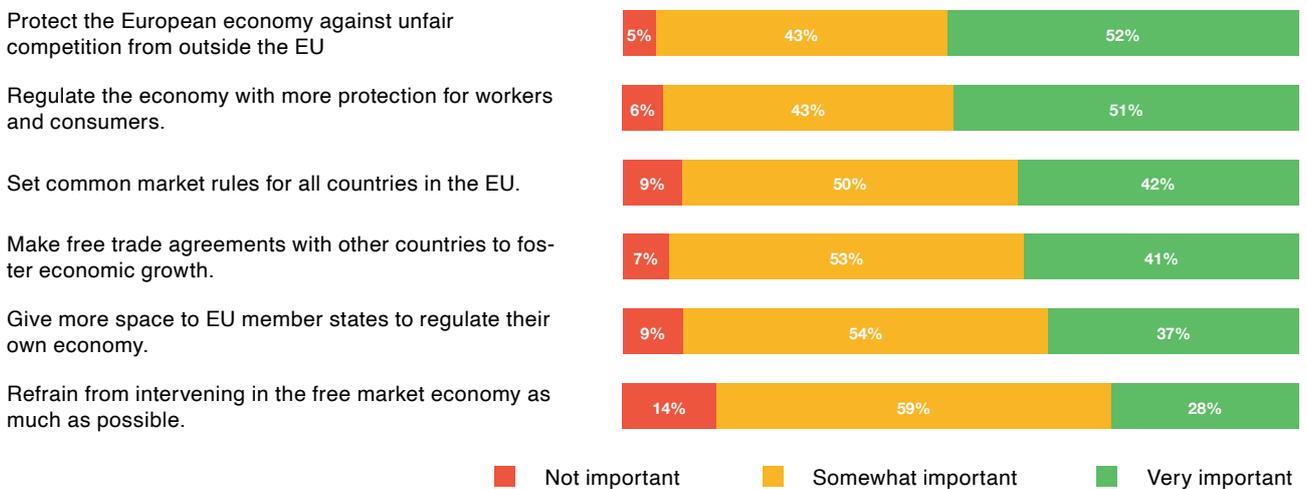
<sup>a</sup>Original statement: 'In the future there should be greater economic integration of EU countries.'

Percentage responding 'agree' or 'strongly agree' by country and segment:



In terms of long-term economic policy goals for the EU, there is a lot of agreement between countries and segments on the priorities. The two most important economic goals for the EU in all countries and among all segments are to protect the European economy against unfair economic competition from outside the EU and to regulate the economy with more protection for workers and consumers. The least important economic policy goals are to give more space to member states to regulate their own economy and to refrain from intervening in the free market economy.

**Figure 3.7 Relative importance of economic policy goals for the EU<sup>a</sup>**



Note: Due to rounding, some percentages do not sum to 100%.

<sup>a</sup>Original question: 'How important do you think the following economic goals should be for the EU?'

## EU financial solidarity, conditionality and enforcement

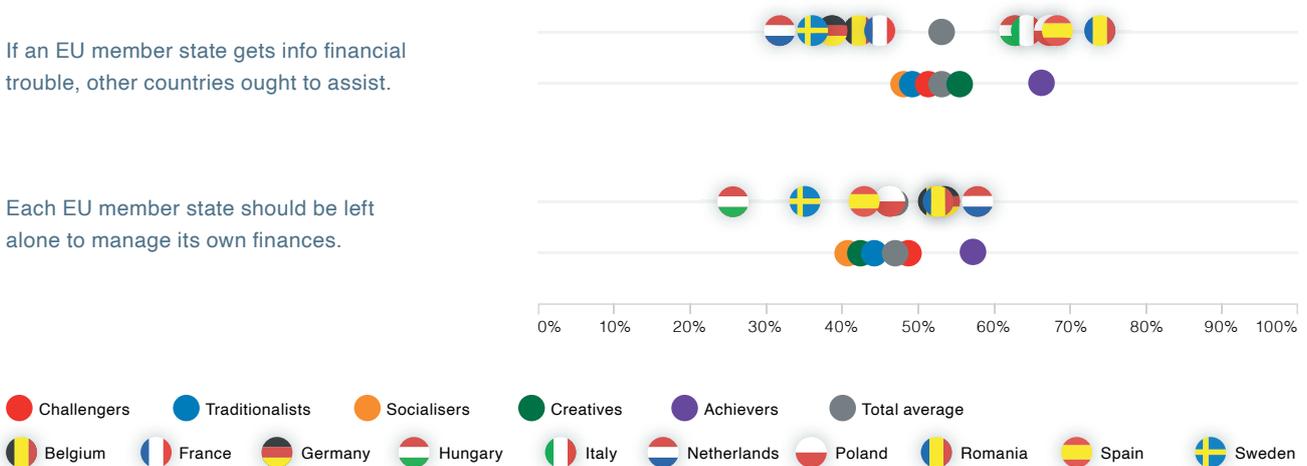
Most people believe that member states which get into financial trouble should be supported by other countries. In countries which are net contributors to the EU budget, such as the Netherlands, Germany, Sweden and Belgium, there is more scepticism about the principle of EU financial solidarity. However, even in the country with the most inflexible views on this—the Netherlands—more people agree with the principle of financial solidarity (33%) than not (16%; the remainder are neutral or answered ‘don’t know’). People with an Achiever mindset are most torn about EU financial support. On the one hand, they support this from their cosmopolitan and pro-EU mindset. On the other, they are deeply invested in the principles of self-reliance and competition.

Majorities in all countries accept the idea of the conditionality of EU financial support, even though the level of support for this varies slightly between countries. Achievers and Creatives, who are the biggest supporters of EU financial solidarity, are also the biggest proponents of conditionality. The idea of EU-level fiscal rules has a more mixed reception. While there is no major opposition to this idea, and in many countries it is supported by a majority, there is considerable hesitation about the concept in Sweden, Poland, Germany and France.

Sanctions as an enforcement mechanism for the principle of conditionality are also quite strongly supported. Majorities in nearly all countries (France and Sweden being the exceptions) agree with the imposition of EU financial sanctions if a member state deviates from EU financial regulations. Larger majorities in all countries also agree with EU sanctions if member states deviate from European standards on the rule of law, although this agreement may depend on the rule of law definition used (see below for more on this). In Poland and Hungary (small) majorities also support EU financial sanctions, for both financial and rule of law criteria.

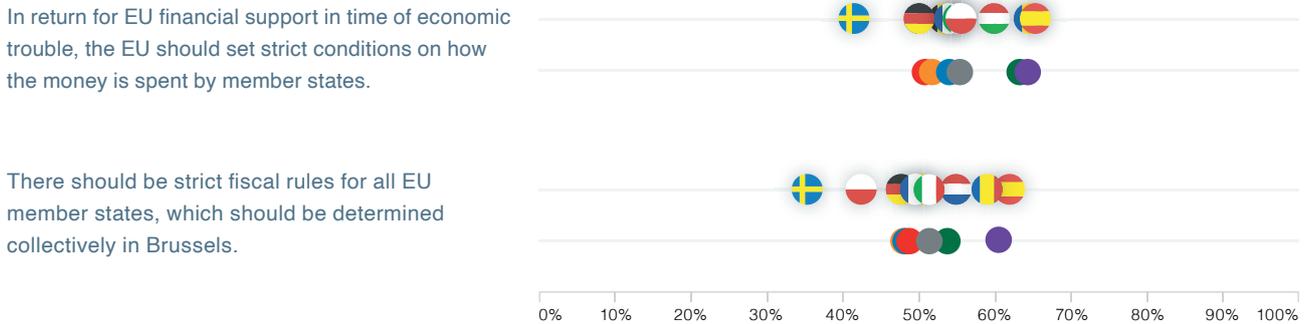
**Figure 3.8 Support for EU financial solidarity**

Percentage responding ‘agree’ or ‘strongly agree’ by country and segment:



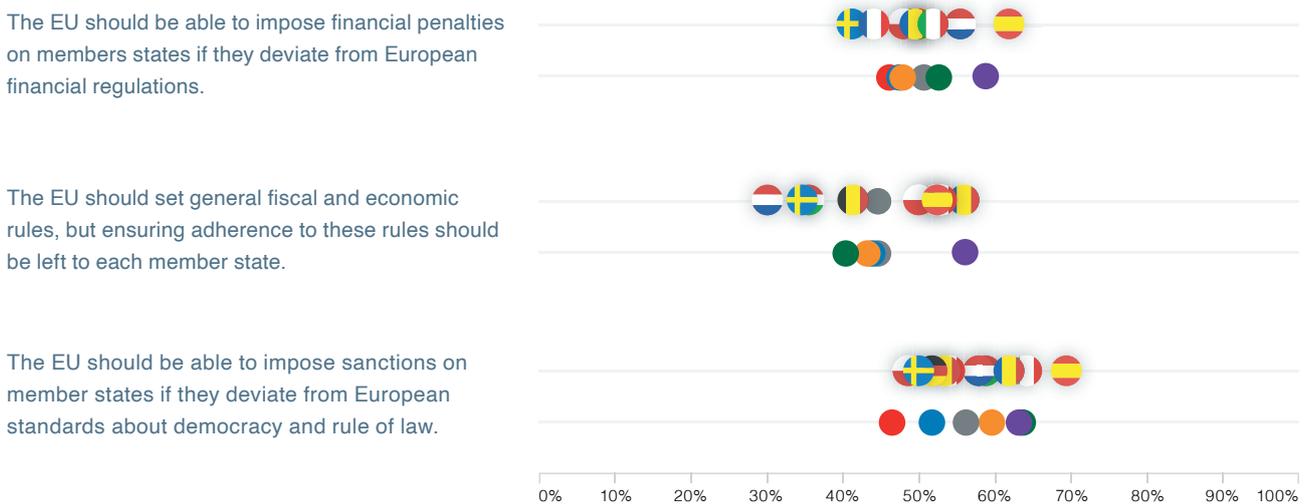
### Figure 3.9 Support for conditionality for EU financial support

Percentage responding 'agree' or 'strongly agree' by country and segment:



### Figure 3.10 Support for enforcement of EU conditionality

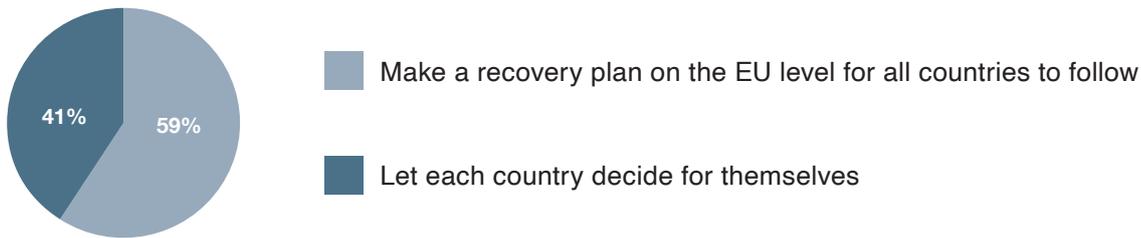
Percentage responding 'agree' or 'strongly agree' by country and segment:



### EU economic recovery

In the survey people were also asked about the EU recovery plan. In most countries a coordinated EU recovery plan is preferred over national plans. Only in France and among the values segment of Traditionalists do slightly more people prefer a national plan.

**Figure 3.11 Preference for EU supervision or otherwise of EU recovery plan funds<sup>a</sup>**



<sup>a</sup>Original question: ‘An EU recovery fund of €750 billion has been established to help EU countries to economically recover from the COVID-19 crisis. What is the best way for countries to use the recovery plan funds?’

Improved crisis responsiveness, the green transition and economic support for struggling businesses are the top three priorities for economic recovery. However, there are notable geographic and values segments differences in this list of priorities. The emphasis on EU recovery funding for the green transition is primarily driven by people with a Creative mindset. Interestingly, people in Poland also strongly prioritise EU funding for their green transition as part of the EU recovery. In Italy, Romania and Spain regional cohesion funds are a top priority for the economic recovery. This is also specifically important for people with a Traditionalist mindset. Germans prioritise investing in their digital economy, a theme that featured prominently in the German election campaign. This is also a priority that specifically resonates with people with a Challenger mindset. Italians, Poles, Romanians and Swedes prioritise investments in their countries’ infrastructure.

**Figure 3.12 Priorities for economic recovery by country and values segment<sup>a</sup>**

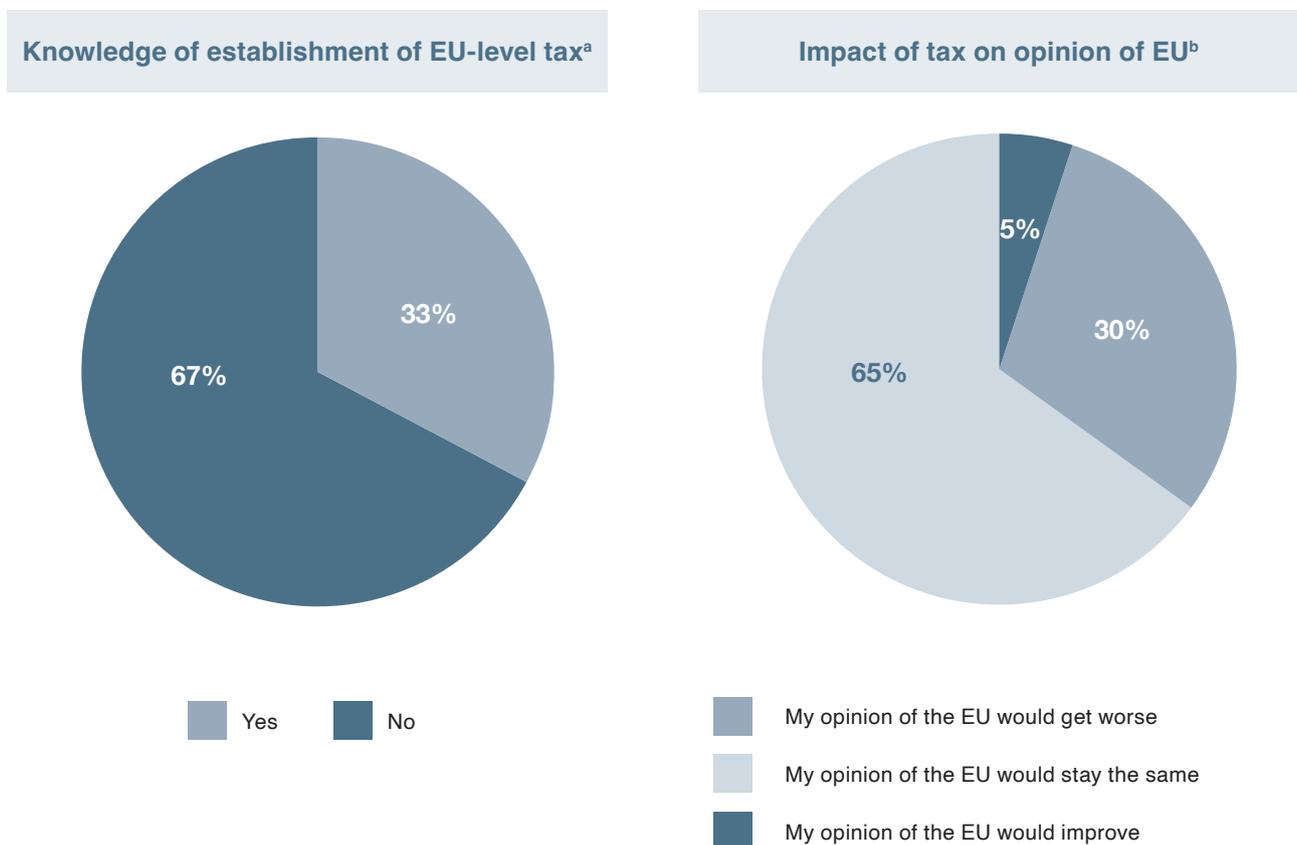
	Improved crisis preparedness and response for when a new pandemic occurs	Transitioning to a ‘green’ economy	Economic support for struggling businesses	Economic benefits for people who have lost their jobs	Making sure no regions and communities in Europe are economically left behind	Increase of investment in research and breakthrough innovation	Better educational projects and improved educational facilities for children and students	More investment in classical road infrastructure and transport networks	Improved training and qualifications of employees	Improved digital infrastructure and online connectivity	None of these
<b>Total</b>	25%	24%	23%	22%	21%	17%	17%	12%	11%	9%	9%
Belgium	27%	24%	21%	20%	23%	14%	17%	10%	8%	6%	15%
France	23%	26%	25%	14%	17%	18%	12%	7%	15%	8%	17%
Germany	31%	18%	16%	19%	14%	17%	21%	8%	11%	20%	13%
Hungary	25%	25%	27%	32%	27%	8%	22%	8%	10%	7%	5%
Italy	19%	29%	23%	25%	22%	24%	8%	18%	10%	11%	6%
Netherlands	29%	28%	25%	18%	14%	11%	24%	6%	7%	6%	16%
Poland	25%	31%	25%	21%	20%	20%	12%	15%	12%	9%	4%
Romania	23%	17%	21%	19%	27%	17%	26%	29%	10%	8%	2%
Spain	21%	21%	26%	26%	35%	22%	13%	7%	15%	8%	3%
Sweden	30%	20%	22%	24%	11%	17%	11%	16%	14%	9%	13%
Challengers	20%	22%	22%	21%	17%	17%	16%	14%	14%	13%	12%
Traditionalists	27%	19%	24%	22%	26%	15%	16%	14%	11%	6%	10%
Socialisers	25%	20%	27%	25%	23%	13%	17%	10%	11%	7%	11%
Creatives	25%	33%	21%	17%	22%	18%	18%	11%	9%	10%	8%
Achievers	23%	25%	21%	27%	21%	16%	14%	14%	15%	12%	7%

<sup>a</sup>Original question: ‘What key priorities should the EU recovery fund support in your country?’

## EU taxation

Only one in three Europeans realise that the EU recovery fund means that EU-level taxes will be levied in the future. For approximately three out of five respondents, this would not change their overall opinion of the EU. However, for some one in three the imposition of taxes would worsen their opinion of the Union. For only 1 in 20 Europeans would it improve their opinion of the EU. EU-level taxes would especially worsen the image of the EU among Traditionalists (37%), who are at the same time the most unaware of this possibility. Among Creatives, who are also generally unaware of this possibility, EU-level taxes would have the least impact on their opinion of the EU (neither positive or negative). There are no large differences between countries on the impact of levying EU-level taxes on people's opinions of the EU.

**Figure 3.13 Awareness of establishment of EU taxes and impact on EU image**



<sup>a</sup>Original question: 'Did you know that setting up the European Recovery Fund will require the establishment of new EU-level taxes in the future?'

<sup>b</sup>Original question: 'Would the imposition of these new EU-level taxes change your overall opinion of the EU?'

## 4. The future of EU common security and defence

The European security landscape has changed significantly since Putin decided to invade Ukraine on 24 February 2022. We therefore decided to re-run the security part of our questionnaire in March to assess the impact of the war in Ukraine on public perceptions of the EU's Common Security and Defence Policy. By comparing the results of the same survey questions before the invasion in Ukraine (fieldwork in November and December 2021) with the results in March 2022, we are able to assess the impact of the war on European public opinion.

### Foreign threat perceptions

Europeans' perceptions of foreign threats have changed drastically since the outbreak of war in Ukraine. Before the invasion, threat perceptions were dominated by global and asymmetric threats: terrorism, migration, climate change and global pandemics. External threats from state actors generally scored low on the list. The major exception to this was in Poland, where Russian foreign policy was already considered the number-one foreign threat before the outbreak of war.

Since the outbreak of war in Ukraine, Russian foreign policy has become the most important foreign threat in all studied EU member states and among all EU population segments. This threat perception increased the most in Sweden, where it tripled from 21% to 61%, which is even higher than in Poland. While perception of the threat from Russia is high everywhere in Europe, the differences between countries with a border with Ukraine are noteworthy. Of Polish people, 57% see Russia as the most important security threat from outside the EU. In Hungary the perception of the level of threat is noticeably lower at 29%. In Romania it is 37%. Among European population segments the threat from Russia is most felt by Creatives.

As a consequence of the rising perception of the threat from Russia, all other threats have decreased in importance. This is especially true of the threat of migration, which is suddenly perceived differently with Ukrainians fleeing the war to find shelter in Europe. The war in Ukraine has also largely diminished the experienced threat of the COVID-19 pandemic and climate change (although the threat of climate change remains high among Creatives). There is a noticeable rise in concern about geopolitical competition between great powers, especially among the more communitarian-oriented Traditionalists and Creatives and in Italy and Romania.

Figure 4.1 Perceived foreign threats<sup>a</sup>

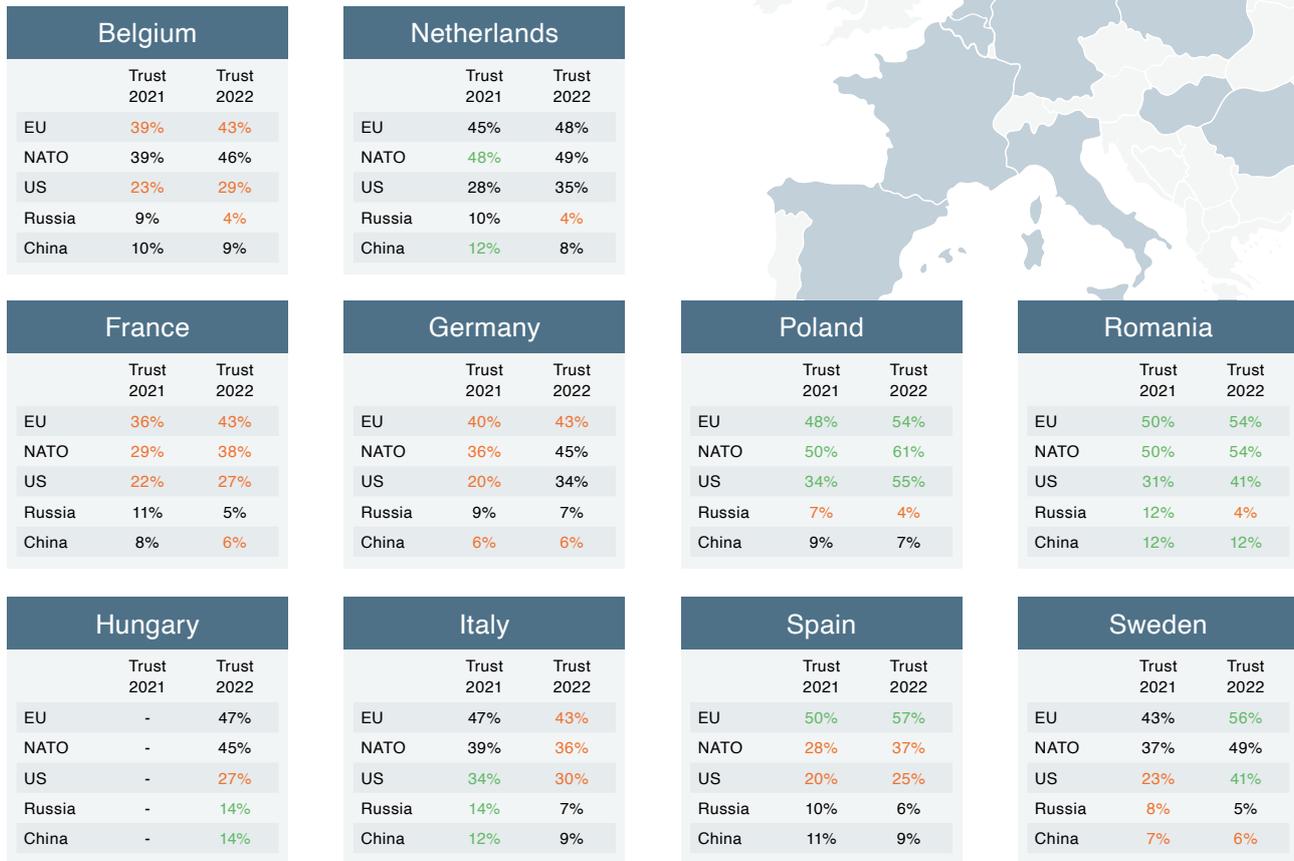
		Russian foreign policy	Terrorism	Climate change	Global pandemics	Migration	Geopolitical competition between great powers	Cybersecurity attacks	Chinese foreign policy	Supply chain disruptions	American foreign policy	Online misinformation	Hybrid attacks	Iran's nuclear programme	Turkish foreign policy	None of these	Do not know
November–December 2021	<b>Total</b>	15%	31%	23%	21%	25%	9%	15%	11%	7%	4%	7%	6%	6%	4%	2%	7%
March 2022	<b>Total</b>	41%	22%	18%	14%	14%	13%	13%	12%	8%	7%	6%	6%	6%	2%	2%	7%
	Belgium	38%	23%	19%	14%	14%	16%	13%	12%	5%	7%	7%	4%	4%	2%	2%	9%
	France	36%	29%	18%	13%	16%	12%	15%	8%	6%	7%	4%	3%	9%	3%	4%	6%
	Germany	45%	20%	21%	9%	14%	8%	11%	18%	9%	5%	4%	4%	3%	4%	6%	6%
	Hungary	29%	19%	15%	20%	25%	13%	13%	9%	5%	15%	14%	5%	5%	0%	0%	6%
	Italy	30%	18%	19%	19%	13%	20%	8%	11%	14%	10%	9%	11%	5%	2%	2%	4%
	Netherlands	41%	21%	19%	13%	11%	13%	19%	14%	2%	3%	4%	3%	5%	5%	1%	13%
	Poland	57%	22%	16%	16%	12%	12%	7%	18%	7%	4%	4%	12%	7%	1%	0%	2%
	Romania	37%	23%	13%	13%	7%	25%	17%	7%	10%	7%	9%	12%	5%	1%	2%	6%
	Spain	38%	22%	25%	24%	12%	11%	11%	9%	17%	7%	3%	5%	7%	1%	1%	4%
	Sweden	61%	23%	18%	2%	12%	6%	17%	16%	3%	5%	5%	4%	6%	1%	1%	9%
	Challengers	31%	21%	20%	14%	14%	11%	11%	13%	9%	7%	5%	9%	6%	5%	5%	7%
	Traditionalists	41%	21%	13%	15%	17%	17%	13%	11%	8%	10%	8%	7%	5%	1%	1%	5%
	Socialisers	45%	26%	14%	14%	16%	10%	15%	12%	8%	4%	4%	3%	5%	2%	1%	9%
	Creatives	47%	19%	25%	13%	8%	16%	13%	14%	7%	7%	7%	6%	5%	1%	1%	6%
	Achievers	41%	24%	17%	15%	15%	12%	13%	12%	7%	8%	8%	9%	8%	2%	1%	3%

<sup>a</sup>Original question: ‘What do you regard as the two most important security threats coming from outside the EU?’

The invasion of Ukraine has had the effect of strengthening trust not only in NATO, but also in the EU and the US. This increase in trust in the EU and NATO is the strongest in Sweden. The war in Ukraine has significantly improved the image of the US in Sweden, Poland, Germany and Romania. Only in Italy has trust in the EU, NATO and the US decreased slightly since last year.

Trust in Russia, which was low to begin with, has been further eroded due to the Ukraine war. To a lesser extent trust in China has also fallen in half of the studied EU member states.

**Figure 4.2 Public trust in the EU, NATO, the US, China and Russia<sup>a</sup>**



Source: Glocalities, *Global Values Survey*, January–February 2021 and bespoke survey March 2022.

Note: Hungary was not included in the 2021 survey.

<sup>a</sup>Original question: ‘Please indicate your general trust in the following institutions/entities.’

**Figure 4.3 General trust in the following entities/institutions, by values segment<sup>a</sup>**

	EU 2021	EU 2022	NATO 2021	NATO 2022	US 2021	US 2022	Russia 2021	Russia 2022	China 2021	China 2022
Challengers	39%	43%	37%	39%	28%	35%	15%	13%	14%	13%
Traditionalists	40%	42%	39%	45%	26%	33%	11%	6%	8%	8%
Socialisers	35%	44%	35%	44%	21%	30%	7%	2%	7%	4%
Creatives	54%	58%	41%	47%	25%	32%	8%	5%	9%	6%
Achievers	55%	59%	50%	62%	38%	48%	14%	6%	13%	17%

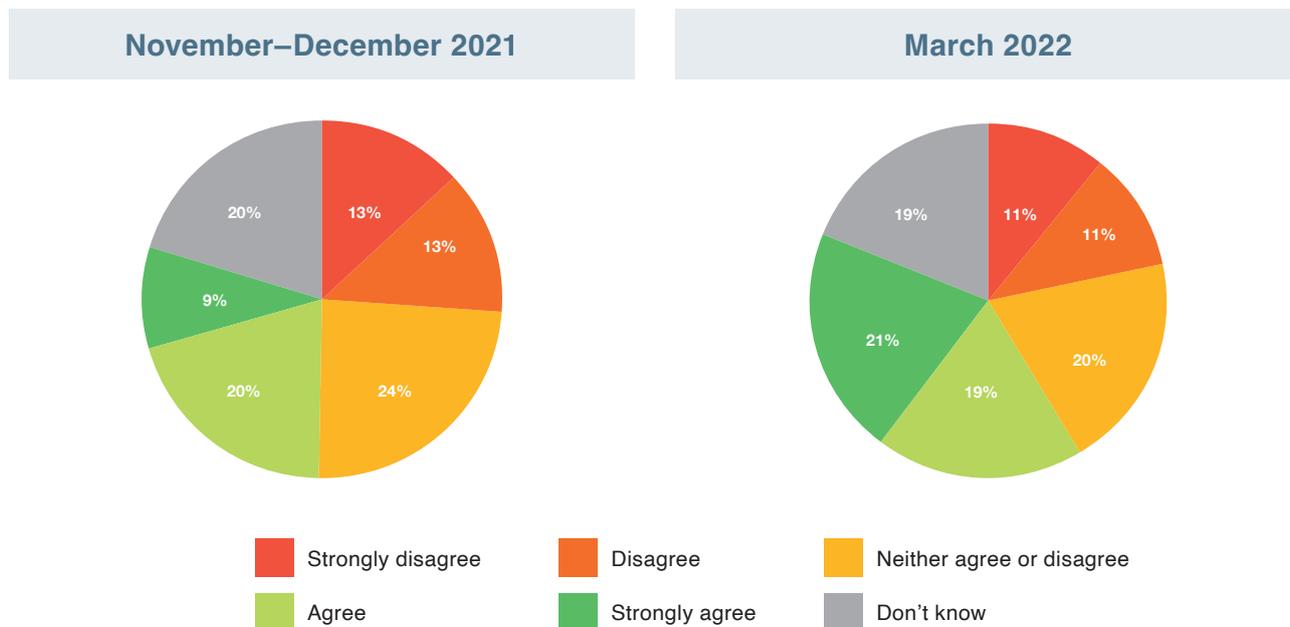
Source: Glocalities, *Global Values Survey*, January–February 2021 and bespoke survey March 2022.

Note: Hungary was not included in the 2021 survey.

<sup>a</sup>Original question: ‘Please indicate your general trust in the following institutions/entities.’

In Sweden we particularly asked about public support for NATO membership, since it was the only country in our survey that is not part of NATO yet. Support for becoming a member of NATO strongly increased in Sweden due to the outbreak of war in Ukraine. Before the war just 29% of Swedes supported NATO membership (26% against), while after the invasion this had increased to 40% (and 22% against).

**Figure 4.4 Preference in Sweden for joining NATO<sup>a</sup>**



Note: Due to rounding, some percentages do not sum to 100%.

<sup>a</sup>Original statement: ‘My country should join NATO.’

## EU common foreign policy priorities

Perceptions of the importance of the security aspect of European foreign policy have strengthened due to the war in Ukraine. Ensuring the protection and security of all EU member states is seen as the number-one priority of the common foreign policy. The EU foreign policy aim of ensuring that the Union can protect itself militarily has also become more important. There is, however, limited appetite to extend security guarantees to neighbouring countries such as Ukraine. Only in Poland, and to a lesser degree in Italy and Spain, has the number of people who believe it important to extend security guarantees to EU neighbours increased, while in the other seven studied countries agreement with this idea remained the same. Poland is also the only country in which agreement with the priority of enlarging the EU increased after the invasion of Ukraine (which presumably reflects an increased preparedness to extend EU membership to Ukraine).

Promoting freedom and democracy is the second most mentioned priority in EU common foreign policy. This is an especially important goal for the population segment of Creatives and in Germany, Italy and Sweden.

**Figure 4.5 Common foreign policy priorities<sup>a</sup>**

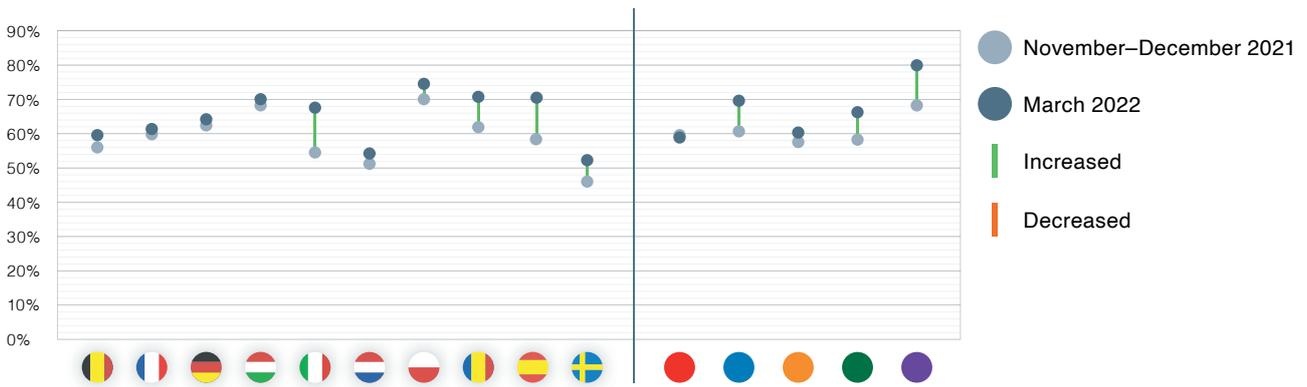
		Protecting the security and prosperity of EU countries	Promoting freedom and democracy	Protecting EU external borders	Ensuring the EU can protect itself militarily	Preventing human rights violations	Establishing the EU as a major global power	Protecting the security and prosperity of EU neighbours	Making EU trade agreements	Enlarging the EU with new member states	None of these	Do not know
November–December 2021	<b>Total</b>	31%	30%	25%	16%	26%	13%	10%	13%	7%	2%	12%
March 2022	<b>Total</b>	35%	27%	24%	23%	20%	13%	12%	11%	7%	3%	12%
	Belgium	38%	24%	25%	25%	11%	14%	10%	11%	8%	4%	14%
	France	30%	23%	21%	26%	18%	23%	12%	10%	7%	4%	12%
	Germany	24%	32%	25%	24%	19%	10%	9%	11%	8%	5%	13%
	Hungary	45%	29%	27%	22%	17%	9%	10%	11%	8%	2%	10%
	Italy	32%	33%	16%	15%	29%	18%	16%	15%	7%	1%	9%
	Netherlands	30%	26%	22%	19%	18%	11%	8%	8%	3%	5%	23%
	Poland	36%	18%	37%	24%	18%	7%	20%	9%	15%	1%	6%
	Romania	42%	21%	24%	21%	23%	16%	11%	14%	7%	2%	8%
	Spain	41%	30%	14%	19%	25%	16%	14%	12%	6%	3%	9%
	Sweden	28%	35%	24%	32%	17%	6%	9%	10%	4%	1%	16%
	Challengers	31%	21%	22%	22%	15%	16%	15%	14%	10%	5%	12%
	Traditionalists	37%	24%	29%	25%	19%	12%	12%	11%	6%	2%	9%
	Socialisers	36%	25%	26%	24%	15%	10%	8%	8%	5%	3%	18%
	Creatives	33%	36%	17%	22%	28%	13%	11%	9%	7%	2%	10%
	Achievers	37%	27%	27%	19%	18%	16%	15%	15%	11%	1%	6%

<sup>a</sup>Original question: ‘What do you think should be the top two priorities for EU common foreign policy?’

## EU strategic autonomy

The EU ambition for more strategic autonomy is embraced by majorities in all countries. The idea that the EU should be able to act more independently in security and defence matters is especially popular in Poland, Italy, Spain and Romania. The concept of strategic autonomy is most embraced by Europeans with a Traditionalist and Achiever mindset. Among these two segments support for EU strategic autonomy also grew most due to the war in Ukraine.

**Figure 4.6 Change in support for EU strategic autonomy<sup>a</sup>**

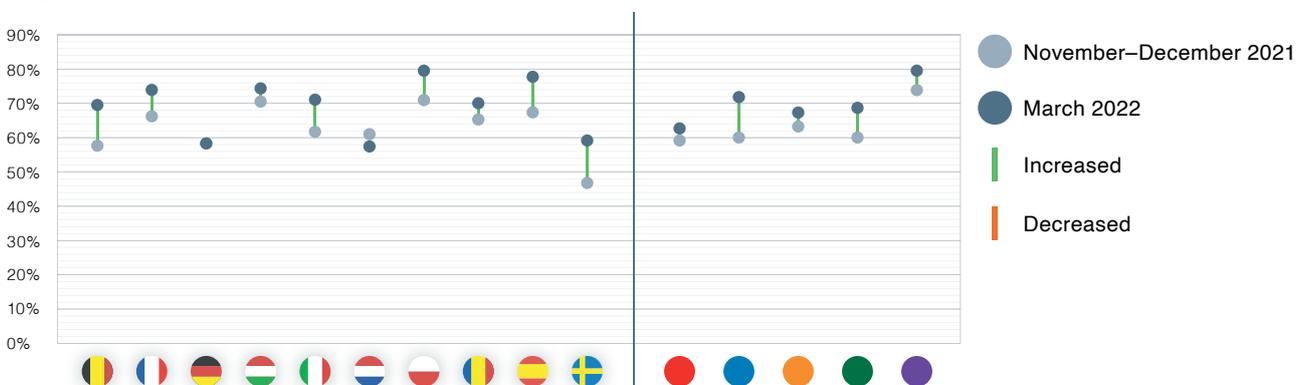


Note: Graph shows change in levels of agreement with the statement posed.

<sup>a</sup>Original statement: ‘The EU should become more able to act on its own when it comes to security and defence matters.’

In 8 of the 10 countries this desire for strategic autonomy translates into increased support for a genuine European Defence Union. However, in Germany and the Netherlands many are still dubious about this idea, and in the latter support has even slightly decreased since the invasion of Ukraine. In all countries people want the EU to work more closely with NATO on security matters. Support for more collaboration in the development of military technology and capability has also increased in all countries.

**Figure 4.7 Change in support for a European Defence Union<sup>a</sup>**

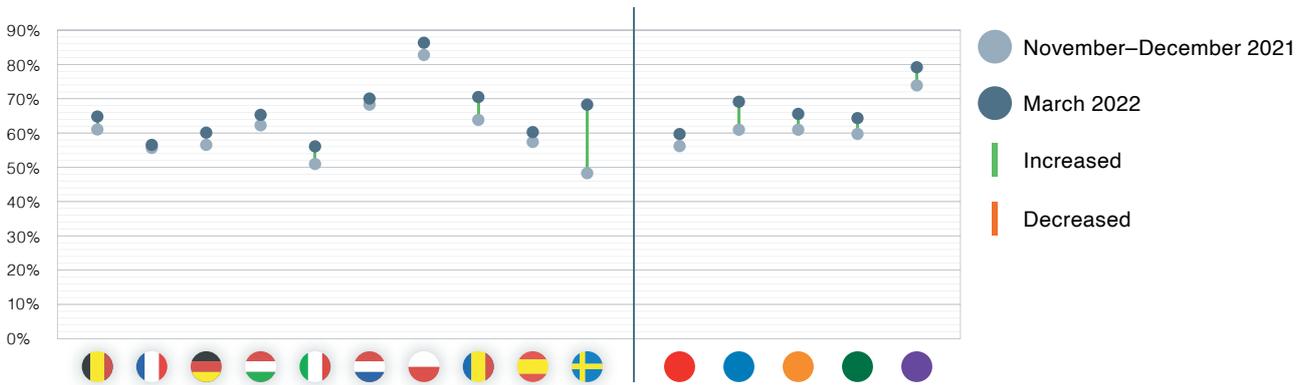


Note: Graph shows change in levels of agreement with the statement posed.

<sup>a</sup>Original statement: ‘The EU should move towards creating a genuine European Defence Union.’



**Figure 4.8 Change in belief that the EU should work more closely with NATO<sup>a</sup>**



Note: Graph shows change in levels of agreement with the statement posed.

<sup>a</sup>Original statement: ‘The EU should work more closely with NATO on security matters.’

**Figure 4.9 Change in belief that EU countries should work more closely with each other in defence technology and capability development<sup>a</sup>**



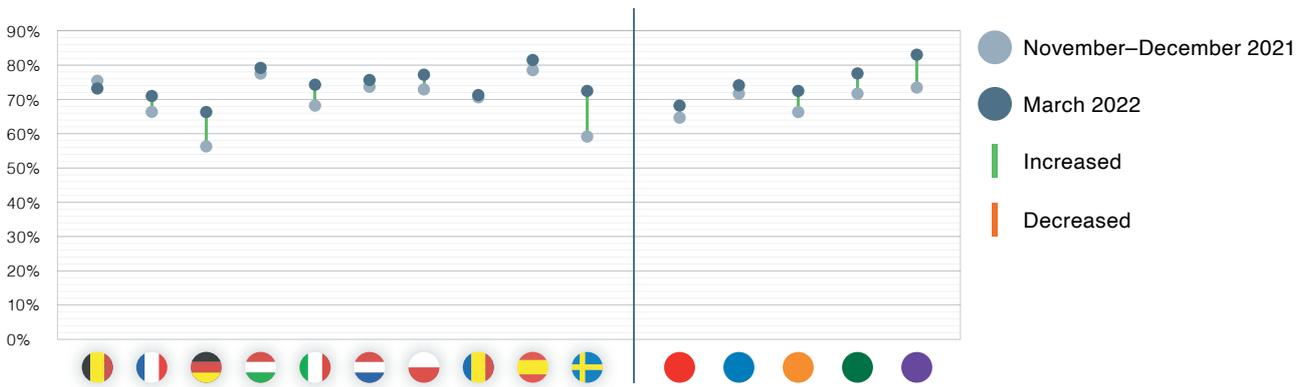
Note: Graph shows change in levels of agreement with the statement posed.

<sup>a</sup>Original statement: ‘EU countries should work more closely with each other when it comes to developing the military technologies and capabilities that are needed to protect Europe in the future.’

People in all countries overwhelmingly believe that, in the case of serious national security threats, EU countries can count on the help of other EU member states. This solidarity in security has particularly grown in Germany and Sweden, where it had been lacking compared to other countries prior to the war in Ukraine. Germany, however, still scores the lowest of all 10 countries on security solidarity.



**Figure 4.10 Change in belief in security solidarity<sup>a</sup>**

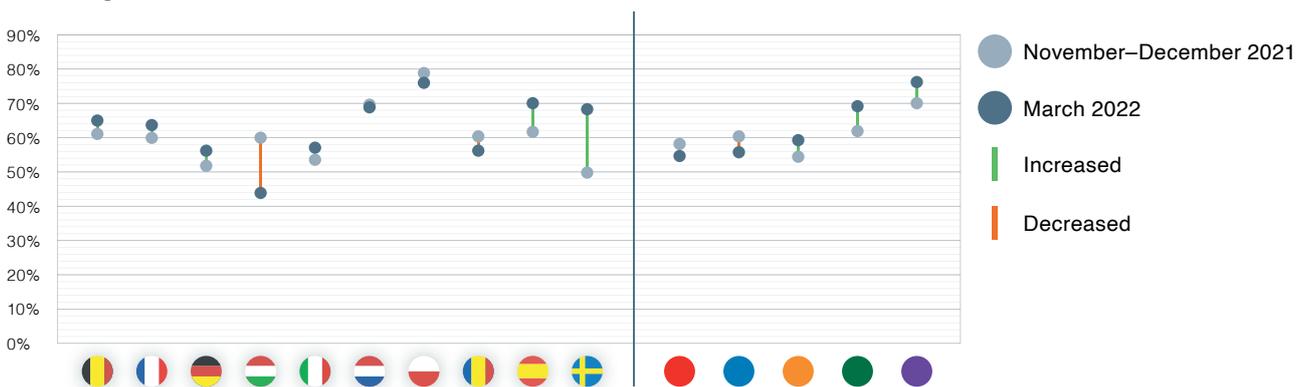


Note: Graph shows change in levels of agreement with the statement posed.

<sup>a</sup>Original statement: ‘In case of serious national security threats, EU countries can count on the help of other EU countries.’

The willingness to provide military support to other EU countries in the case of an attack, even if that attack does not threaten one’s own country directly, is lower than the general belief in security solidarity. But willingness for the EU to provide military assistance in this regard has also grown in most countries since the Ukraine crisis, especially in Sweden. The major exception to this is Hungary, where preparedness to provide military assistance under these circumstances fell from 60% to 42%. This might be explained by recent electoral campaigning in Hungary by the ruling (Hungarian Civic Alliance/Fidesz) party, which stoked fears about the catastrophic consequences of getting sucked into the war in Ukraine.

**Figure 4.11 Support for the idea of military solidarity, even if one’s own country is not directly threatened<sup>a</sup>**



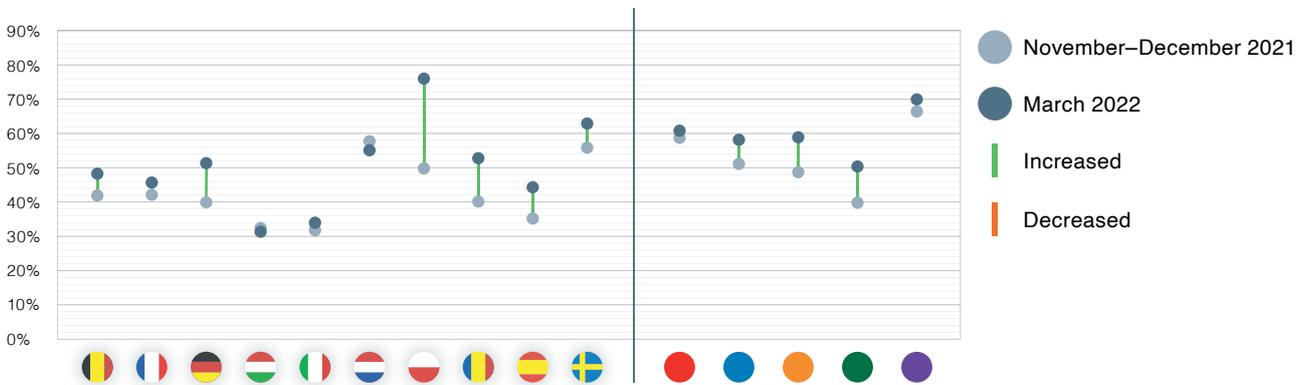
Note: Graph shows change in levels of agreement with the statement posed.

<sup>a</sup>Original statement: ‘<Respondent’s country> should provide military support and assistance to another EU country if that country is under attack, even if that attack does not threaten <respondent’s country> directly.’



To what extent is the ambition for more EU strategic autonomy backed up by popular support for more military resources and a willingness to give up some national sovereignty in the security domain? The war in Ukraine has led to a significant increase in support for more military spending. In France, Germany, Poland, Belgium and Romania especially, more people feel that governments do not allocate enough money to the military budget and defence spending. However, in all countries except Poland these people still represent less than half of the population. The biggest swing in opinion took place among the population segment of Creatives, who have become 11% more supportive of military spending due to the Ukraine war. While this more social-liberal population segment, which tends to have an inherent aversion to military power, is still the least enthusiastic about more military spending, it has become much less rigid in its resistance. Public support for more involvement in EU crisis-management missions has also grown in all countries and segments.

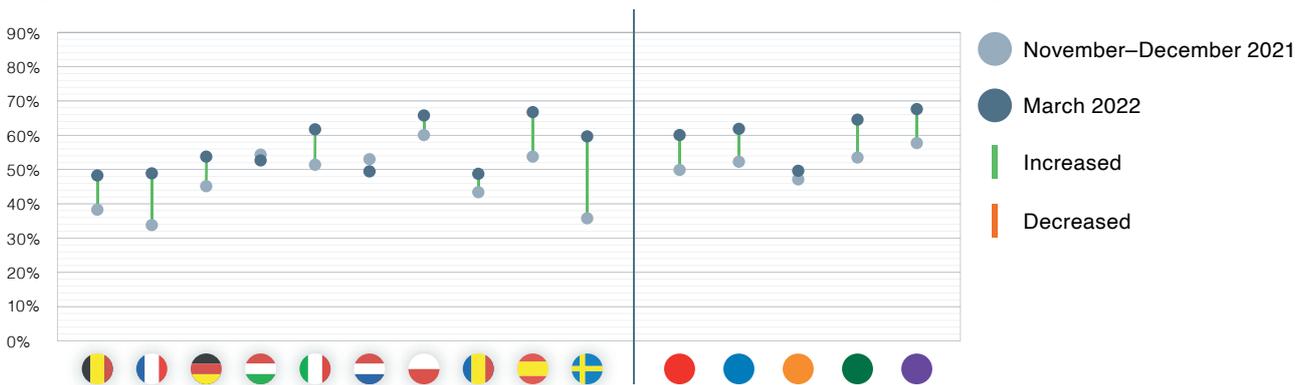
**Figure 4.12 Change in belief that military and defence budgets are underfunded<sup>a</sup>**



Note: Graph shows change in levels of agreement with the statement posed.

<sup>a</sup>Original statement: ‘Governments do not allocate enough money to the military and defence.’

**Figure 4.13 Change in support for involvement in EU crisis management abroad<sup>a</sup>**



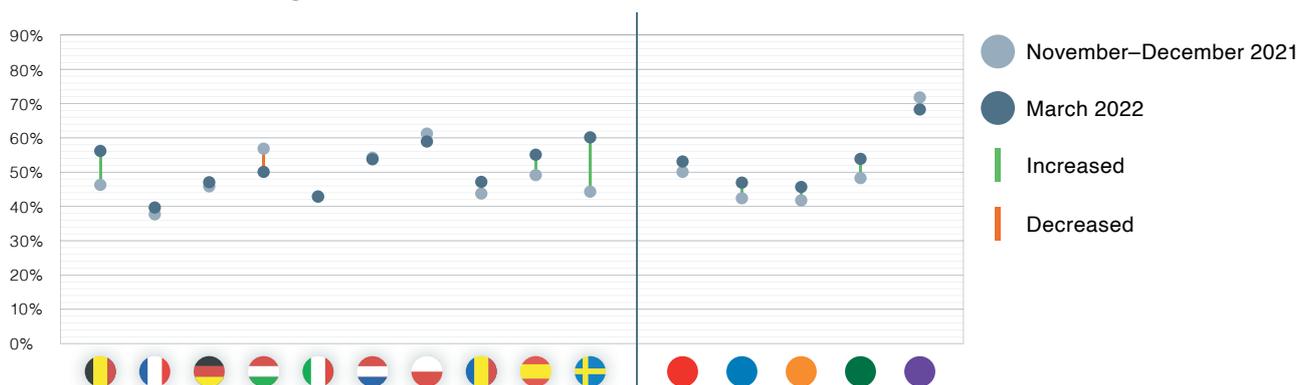
Note: Graph shows change in levels of agreement with the statement posed.

<sup>a</sup>Original statement: ‘My country should get involved in crisis-management operations abroad, organised by the EU.’



On other aspects of giving up some national sovereignty in exchange for more EU military initiatives, there is less support. Willingness to let soldiers from one's own country serve under a general from another EU country hardly changed from the 41% support before the Ukraine war. This willingness notably increased in Belgium and Sweden, but decreased in Poland and Hungary. The preparedness of the French to give up France's permanent membership of the UN Security Council to enable an EU membership has decreased rather than increased since the outbreak of war in Ukraine.

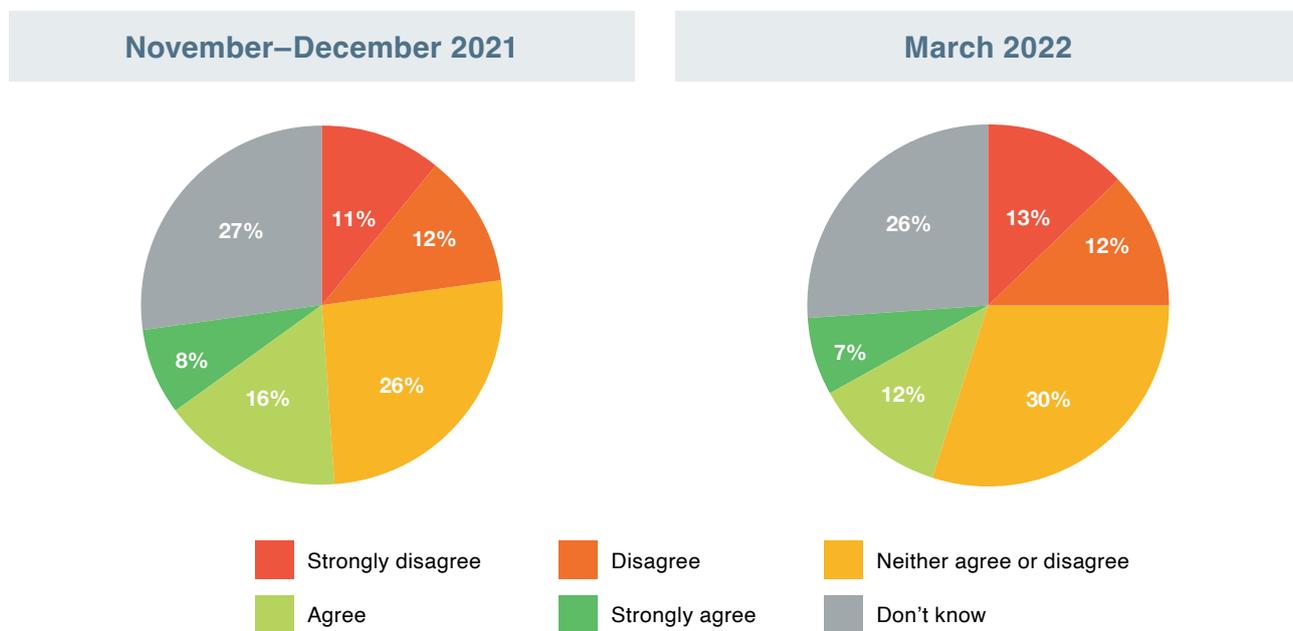
**Figure 4.14 Change in support for national soldiers serving under a general from another EU country<sup>a</sup>**



Note: Graph shows change in levels of agreement with the statement posed.

<sup>a</sup>Original statement: 'Soldiers from my country should be able to serve under a general from another EU country.'

**Figure 4.15 French support for giving up its UN Security Council seat<sup>a</sup>**



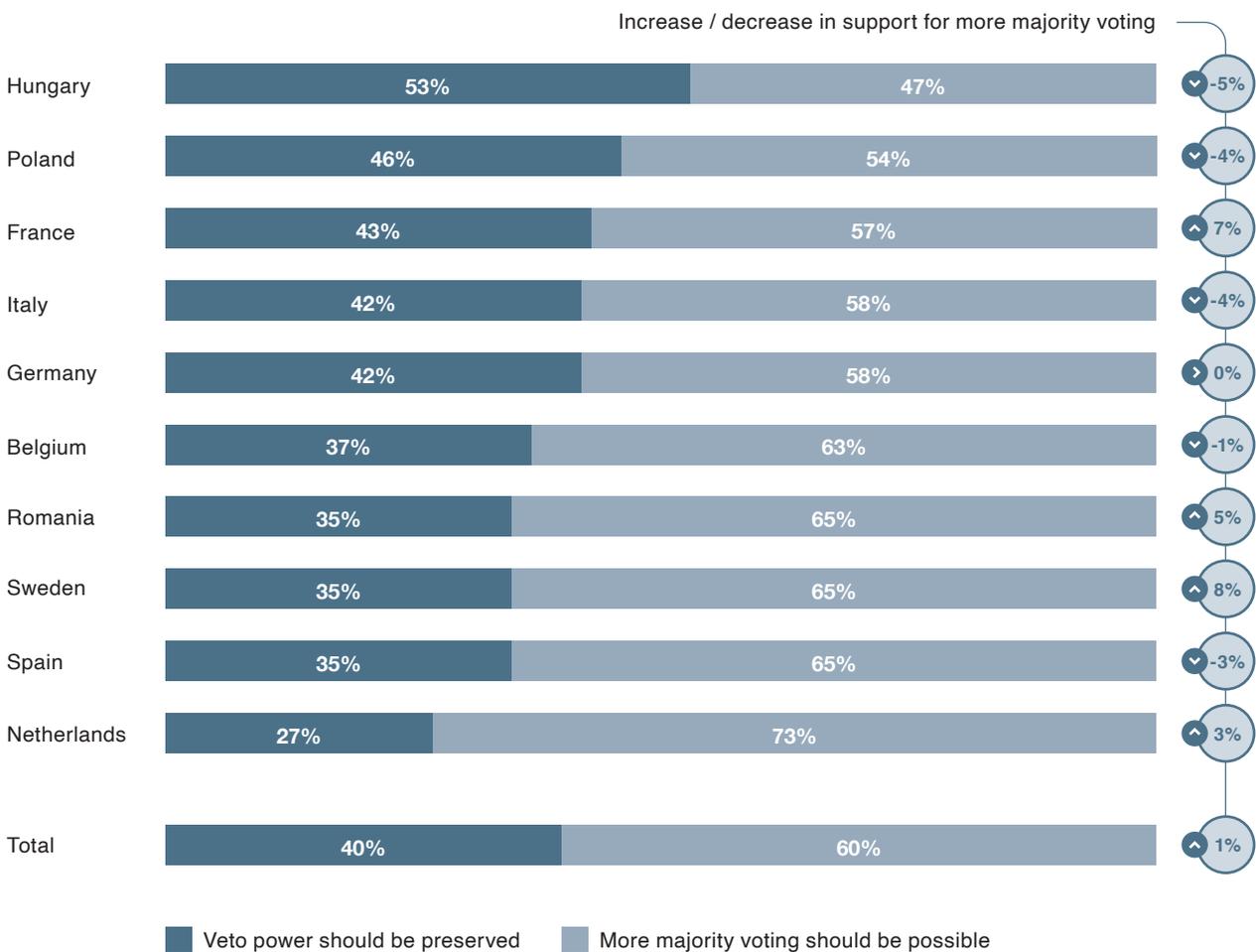
<sup>a</sup>Original statement: 'France should give up its seat in the UN Security Council to make available a seat for the EU.'

## Veto power by EU member states

In almost all studied countries there is majority support for more majority voting on EU common foreign policy, although there is also considerable opposition. In France there is the most resistance to giving up veto power in foreign policy. On this question there are also a high number of people who answer ‘don’t know’ (which is omitted from Figure 4.16), which shows that it is not an issue that troubles the minds of Europeans.

Challengers are more likely to want to preserve veto power than the other segments, while Creatives are more likely than other groups to support majority voting.

**Figure 4.16 Preference for national veto or majority voting on EU foreign policy<sup>a, b</sup>**



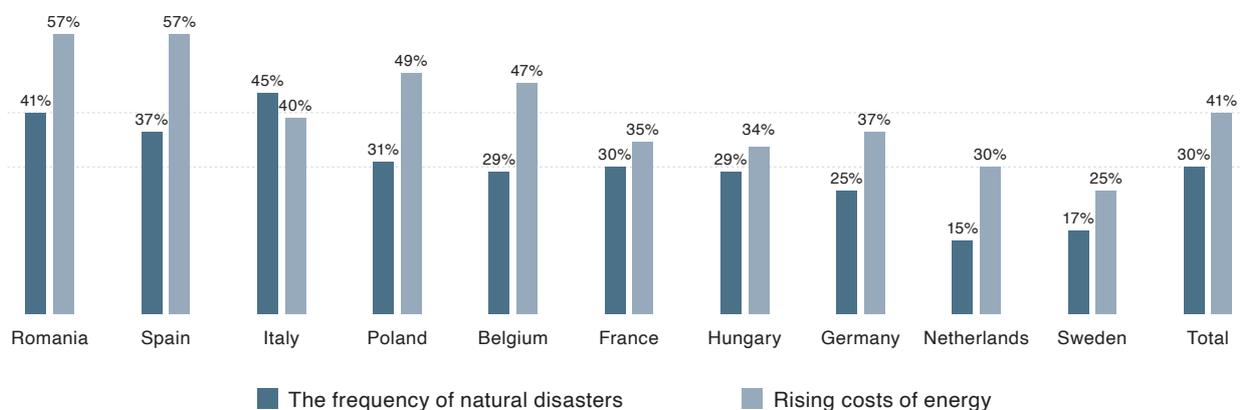
<sup>a</sup>The data presented here is from the bespoke survey in March 2022. The increases or decreases indicated in the right column refer to changes in support for more majority voting between this survey and the bespoke survey in November-December 2021.

<sup>b</sup>Original question: ‘Do you think veto power by member states on common foreign policy should be preserved, or should more decisions be made by majority voting? (For example, if 75% of member states agree then a vote is passed.)’

## 5. The future of joint climate action

Climate change is affecting people in multiple ways. In the survey respondents were asked about their level of anxiety with regard to two particular aspects of climate change: the frequency of natural disasters and the rising costs of energy. Worries about rising energy costs are highest in Romania, Spain, Poland and Belgium. However, in these countries worries about the frequency of natural disasters are also high. Italy is the only country where concern about the frequency of natural disasters is higher than it is about rising energy costs. Creatives are most worried about the frequency of natural disasters, while Traditionalists are most worried about rising energy costs.

**Figure 5.1 Share of people who are very worried about natural disasters and energy costs<sup>a</sup>**



*Note:* The countries have been ranked from most worried to least worried overall.

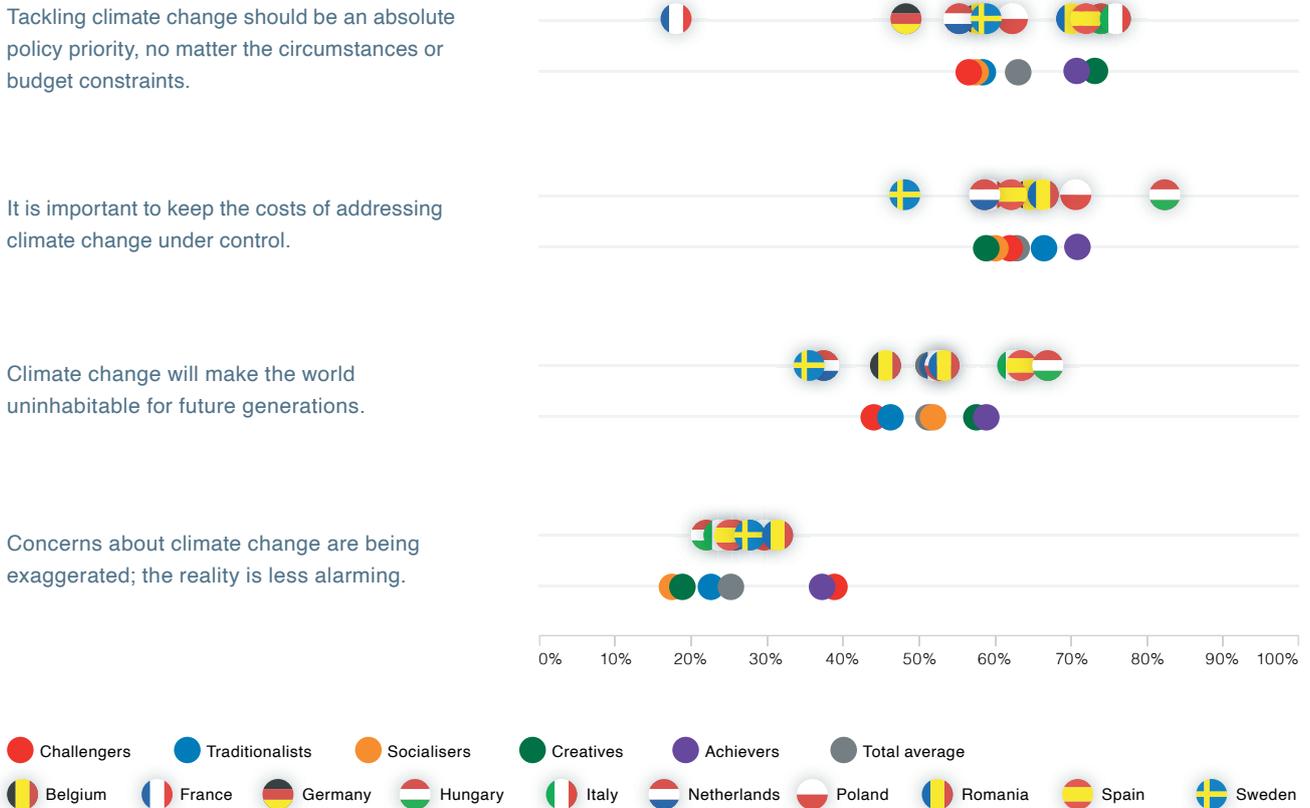
<sup>a</sup>Original question: 'How worried are you about the impact of climate change on (a) natural disasters; (b) rising energy costs?'

Climate anxieties run quite high. On average, 50% of citizens believe that climate change will make the world uninhabitable for future generations. Interestingly, climate anxieties are highest in Spain, Hungary and Italy. Far fewer people believe that concerns about climate change are being exaggerated, although this sentiment is stronger in Poland and Romania and also among the more pragmatic population segments of Challengers and Achievers.

On the cost of addressing climate change, people have very mixed views. On the one hand, majorities believe that tackling climate change should be an absolute priority which should be addressed without budget constraints. This blank cheque approach to tackling climate change is most embraced by Creatives. On the other hand, majorities also believe that it is important to keep the costs of climate change under control, especially in Central Europe and among the more conservative segments of Traditionalists and Achievers.

## Figure 5.2 Climate anxieties and costs

Percentage responding 'agree' or 'strongly agree' by country and segment:



Rising energy prices have been felt particularly strongly in the last couple of months, aggravated by the war in Ukraine. Large parts of European society feel that the electricity and gas price increases will have a big impact on their household budget. This impact is being most strongly felt in Italy, Spain, Poland and Romania. The impact is felt across population segments, but most strongly among Traditionalists.

This has had a considerable influence on people's willingness to facilitate the transition towards more environmentally friendly energy sources by paying higher energy bills. In particular, willingness to do this has dramatically decreased in recent months among the pragmatic and individualistic Challengers.

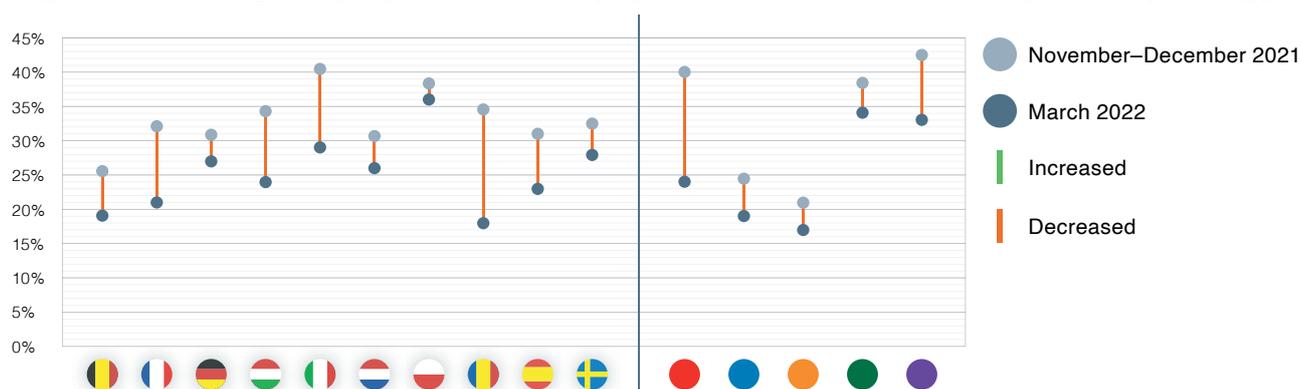
**Figure 5.3 Change in number of respondents reporting a big impact due to rising energy prices<sup>a</sup>**



Note: The graph shows the increase in the number of respondents answering ‘a big impact’.

<sup>a</sup>Original question: ‘How much impact do the current electricity and gas price increases have on your household budget?’

**Figure 5.4 Change in preparedness to pay more for environmentally friendly energy<sup>a</sup>**



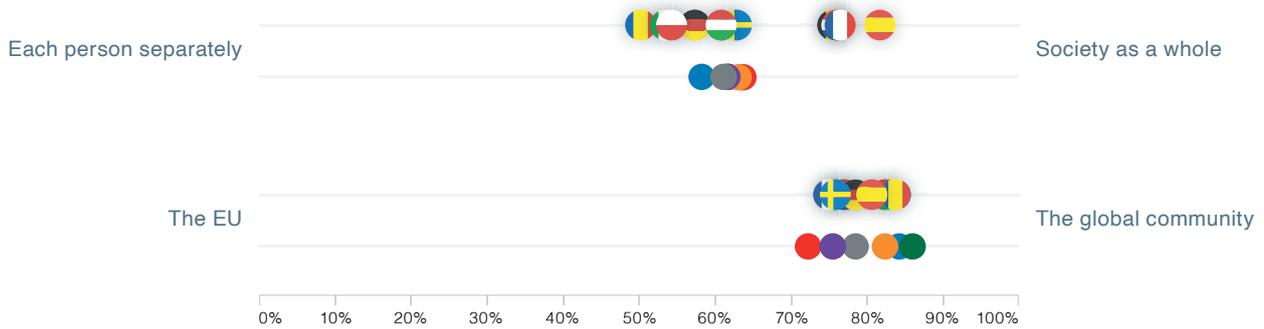
Note: Graph shows change in levels of agreement with the statement posed.

<sup>a</sup>Original statement: ‘I am prepared to pay a higher energy bill to facilitate the transition to more environmentally friendly energy sources.’

## Climate action responsibility and solutions

People primarily see addressing climate change as a responsibility of society as a whole, instead of as an individual responsibility. However, in Romania, Poland, Germany and Italy, people are more inclined to look at it as a personal responsibility too. It is also an issue that is primarily seen as a global rather than a European issue.

**Figure 5.5 Respondents' beliefs regarding where responsibility for climate action lies<sup>a</sup>**



<sup>a</sup>Original statement: 'Addressing climate change is primarily the responsibility of 'Each person separately/society as a whole' and 'the EU/the global community.'

Personal willingness to help address climate change lies mostly in making different lifestyle choices (in consumption/travel) and encouraging others to do the same. Taxation is the least frequently mentioned way people are willing to support climate action. An average of one in four do not believe their individual choices will make any difference.

Creatives are most prepared to change their lifestyle, while Traditionalists are most prepared to set the heating thermostat at home lower in the winter. The more individualistic Challengers and Socialisers are the most cynical about their personal choices mattering much.

**Figure 5.6 Personal willingness to take actions against climate change<sup>a</sup>**

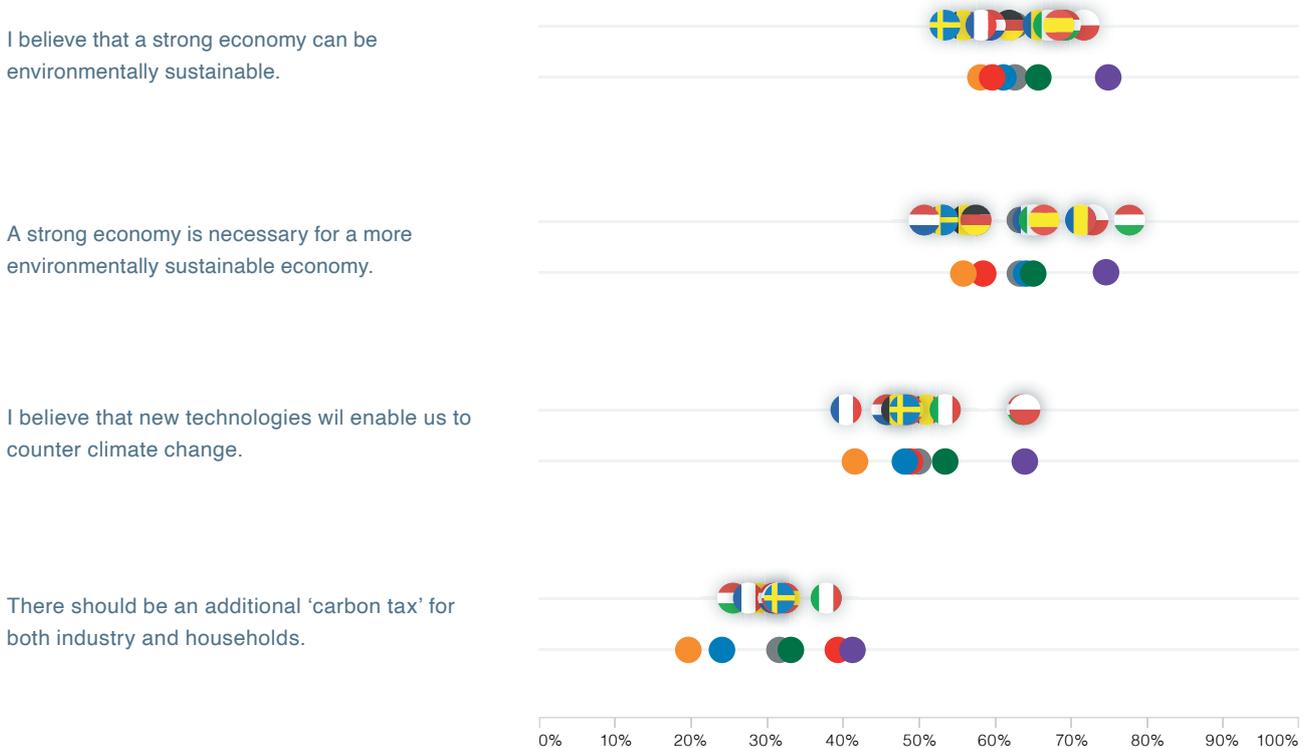
<u>Reconsider some lifestyle choices related to consumption and travel</u>	45%
<u>Encourage others to adopt a more eco-friendly lifestyle</u>	43%
<u>Set the heating at home a little lower in the winter</u>	38%
<u>Avoid products that come from carbon intensive industries</u>	36%
<u>Vote for parties that have climate change mitigation high on their agenda</u>	30%
<u>Share campaign messages on social media</u>	18%
<u>Pay more taxes to help mitigate climate change</u>	13%
<u>I do not believe that my individual choices will help the fight against climate change</u>	26%

<sup>a</sup>Original question: 'How would you personally be willing to help address climate change?'

The view that a strong economy and environmental sustainability can go together is supported by two-thirds of the population. Around half of the people believe that new technological solutions will enable us to address climate change. This belief in the success of technology is greatest in Central Europe and lowest in France. There is a very mixed reception for the idea of additional ‘carbon taxing’. On average 36% would support it, with similarly 35% in opposition and 29% neutral. There is strong resistance to the idea in Hungary, Germany and France. It is an especially polarising issue within European societies. Traditionalists and Socialisers—who are more locally oriented and have a lower or medium level of education—are mostly against it (approximately half against and one in four in favour). The more cosmopolitan and more educated Creatives and Achievers are much more open to such a tax (approximately 4 in 10 in favour versus 1 in 3 against).

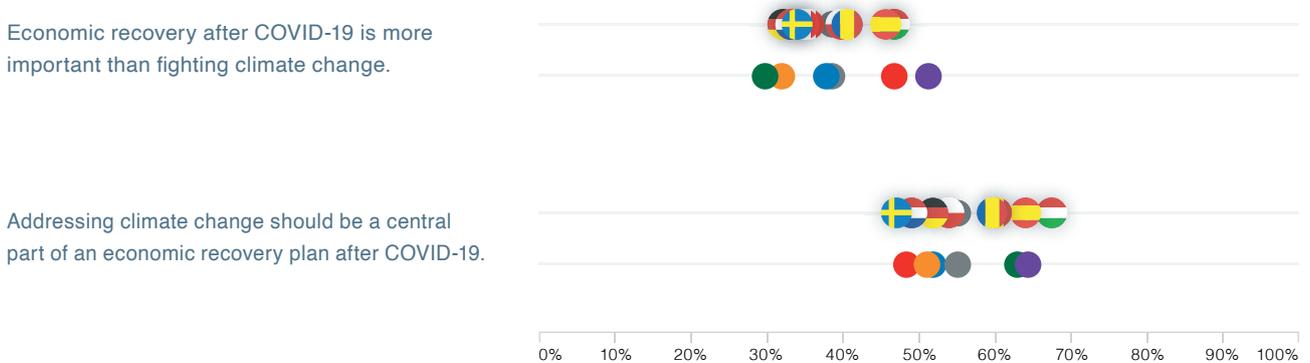
### Figure 5.7 Opinions on climate action solutions

Percentage responding ‘agree’ or ‘strongly agree’ by country and segment:



## Figure 5.8 Opinions on climate action and economic recovery

Percentage responding 'agree' or 'strongly agree' by country and segment:



## European Green Deal

The European Green Deal is the EU's flagship project to counter climate change across all member states. The policy package has been received with cautious optimism. 'Interested', 'optimistic' and 'curious' are the top associations people have with it (respondents were asked to select their top associations from a list of five positive and five negative associations). However, even after the policy goals of the EU Green Deal had been explained to respondents, some 16% still did not have any feelings about it. This indicates that more effort is needed to familiarise people with the Green Deal. In the Netherlands, Sweden, France and Germany in particular, the European Green Deal is still largely unknown. In any case, the European Green Deal does not evoke especially strong feelings, either positive (the association 'inspired' was rarely selected) or negative (people rarely selected 'afraid' or 'nervous').

**Figure 5.8 European Green Deal associations<sup>a</sup>**

	Interested	Optimistic	Curious	Alert	Afraid	Pleased	Nervous	Upset	Determined	Inspired	None of these
<b>Total</b>	29%	24%	22%	19%	14%	13%	12%	11%	11%	9%	16%
Belgium	25%	16%	21%	23%	15%	8%	17%	10%	9%	6%	19%
France	22%	16%	18%	26%	11%	11%	11%	9%	9%	7%	24%
Germany	26%	21%	12%	17%	14%	14%	11%	17%	14%	9%	20%
Hungary	36%	34%	37%	31%	6%	18%	7%	5%	12%	12%	9%
Italy	31%	20%	17%	21%	13%	9%	14%	13%	10%	7%	9%
Netherlands	28%	25%	21%	13%	9%	12%	9%	6%	12%	15%	29%
Poland	32%	22%	25%	22%	13%	15%	10%	13%	8%	12%	10%
Romania	38%	37%	33%	3%	21%	18%	9%	12%	12%	8%	4%
Spain	33%	27%	19%	28%	21%	18%	19%	13%	13%	7%	11%
Sweden	23%	22%	16%	7%	12%	11%	15%	12%	9%	11%	28%
Challengers	25%	19%	19%	17%	16%	14%	14%	14%	14%	12%	15%
Traditionalists	31%	21%	23%	18%	16%	12%	11%	13%	8%	9%	20%
Socialisers	23%	24%	21%	17%	12%	10%	13%	11%	5%	5%	23%
Creatives	34%	27%	26%	20%	11%	14%	10%	9%	12%	11%	14%
Achievers	33%	25%	23%	21%	13%	19%	8%	9%	17%	13%	10%

<sup>a</sup>Original question: ‘To overcome the challenges of climate change and environmental degradation, the EU has launched the European Green Deal. The plan sets three large goals for the European economy: climate neutrality by 2050 (with legally binding targets for member states), decoupling economic growth from resource use (more electric cars, closing down coal factories etc.), and the provision of economic support to vulnerable regions and communities in this economic transition (mineworkers, people with low incomes etc.). How do you feel about this?’

## 6. The future of EU values

To what extent does an EU identity exist and how is it taking shape? Only 14% of respondents from the survey primarily identify as European citizens. The more highly educated Creatives and Achievers more often identify as European, while the three other segments identify themselves significantly less often as European citizens first and foremost. National identification remains the most important geographical identity in Europe for 38% of respondents, especially among the less- and mid-educated Traditionalists and Socialisers. Local identities are also important in Europe, especially in countries with a decentralised system of government, such as Germany and Belgium. However, 21% of respondents consider their European identity to be as important as their national or local identity.

**Figure 6.1 Respondents' identifications with geographical identities<sup>a</sup>**

	National	Regional	European	Unknown	All of the above, equally
<b>Total</b>	<b>38%</b>	<b>20%</b>	<b>14%</b>	<b>6%</b>	<b>21%</b>
Belgium	29%	28%	14%	13%	16%
France	45%	19%	14%	8%	14%
Germany	32%	28%	15%	9%	16%
Hungary	40%	11%	15%	4%	30%
Italy	34%	25%	19%	5%	17%
Netherlands	44%	16%	9%	8%	23%
Poland	40%	10%	20%	5%	25%
Romania	33%	22%	17%	4%	25%
Spain	31%	21%	16%	2%	30%
Sweden	52%	24%	7%	7%	11%
Challengers	35%	25%	13%	9%	18%
Traditionalists	46%	17%	11%	4%	22%
Socialisers	41%	23%	8%	6%	21%
Creatives	31%	18%	19%	6%	26%
Achievers	35%	18%	27%	3%	17%

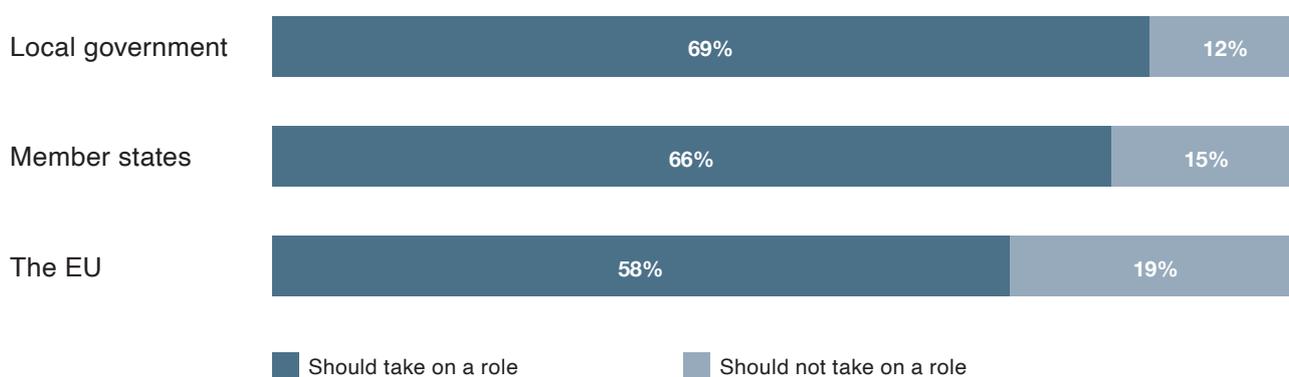
<sup>a</sup>Original question: 'Do you primarily feel more: a European citizen; a citizen of my country; a citizen of my region; all of the above in equal measure; don't know'.

Interestingly national identity is not necessarily the same as national pride (measured through pride in your flag). Poland is a case in point. Poles score very highly for national pride, but averagely for national identification, while scoring very highly for European identity and a multilevel geographical identity. This shows how the differences between 'somewhere' and 'anywhere' attachments are much more complex and context dependent than is sometimes assumed. The re-emergence of Poland as a sovereign state in the 1990s occurred at the same time as Polish integration with the EU. Hence, national pride and European identification go hand in hand in the context of Poland.

## European cultural heritage

Cultural attachments are especially strong on a local level. The promotion and protection of cultural heritage is seen as the responsibility of primarily local governments, followed by national governments and then by the EU. While the percentage of those who think that the EU has a role to play in the protection of (common) cultural heritage is lower than it is for local and national governments, it is still a large majority of Europeans. The protection of cultural heritage is especially important on all levels in Hungary, Romania and Spain.

**Figure 6.2 Responsibility for the protection of cultural heritage<sup>a</sup>**



Note: The percentages do not add up to 100% because 'do not know' has been omitted.

<sup>a</sup>Original question: 'Do you think the following institutions have a role in promoting and protecting cultural heritage via rules and regulations?'

So what are the positive aspects of a European cultural heritage that should be cherished? The war in Ukraine has focused the minds of Europeans on this question. Peace is the most important European value, cherished by people in all countries. This provides a strong new public legitimacy for the EU based on its foundational story of 'no more war'. Peace as a European value is interestingly most supported by Traditionalists and Socialisers, the two segments that, in general, place the least trust in the EU. The EU values of human rights, democracy and freedom are also strongly supported in all countries and across population segments. Another often mentioned common cultural heritage is safety. Family values are often mentioned by Traditionalists and Achievers and in Central Europe. Judeo-Christian values scored remarkably low on this list, alongside our shared history and traditions. Only 5% of respondents believe that there is no common European cultural heritage.

**Figure 6.3 Substance of common EU cultural heritage<sup>a</sup>**

		Peace	Democracy	Freedom	Human rights	Safety	Equality	Solidarity	Family values	Cultural diversity	Free markets	Friendship	Common traditions	A shared history	Hope	Community	Judeo-Christian values	Shared architectural and artistic traditions	There is no common European heritage	Do not know
November–December 2021	<b>Total</b>	28%	30%	28%	31%	23%	20%	14%	13%	13%	11%	9%	9%	8%	7%	8%	5%	6%	5%	7%
March 2022	<b>Total</b>	39%	32%	30%	28%	25%	17%	15%	12%	11%	11%	9%	8%	6%	6%	6%	5%	4%	6%	6%
	Belgium	30%	29%	27%	22%	20%	15%	18%	13%	11%	12%	7%	11%	7%	7%	6%	5%	5%	9%	9%
	France	38%	33%	32%	25%	21%	16%	15%	9%	12%	7%	9%	6%	10%	6%	4%	8%	4%	7%	7%
	Germany	36%	34%	26%	26%	26%	12%	10%	7%	13%	10%	11%	7%	4%	7%	11%	4%	4%	8%	10%
	Hungary	46%	33%	27%	31%	33%	16%	9%	20%	10%	12%	8%	7%	6%	4%	3%	5%	4%	3%	6%
	Italy	38%	31%	34%	29%	25%	22%	14%	15%	12%	13%	8%	10%	4%	6%	7%	6%	6%	3%	4%
	Netherlands	35%	29%	34%	21%	26%	14%	9%	7%	9%	12%	9%	6%	5%	4%	5%	7%	2%	10%	12%
	Poland	37%	25%	31%	26%	29%	14%	20%	17%	16%	14%	11%	9%	9%	6%	5%	6%	4%	3%	3%
	Romania	42%	27%	26%	28%	23%	21%	19%	21%	11%	14%	11%	6%	2%	12%	7%	4%	5%	3%	4%
	Spain	34%	33%	34%	35%	26%	23%	19%	7%	14%	11%	6%	7%	5%	7%	9%	2%	5%	5%	2%
	Sweden	51%	43%	33%	34%	25%	20%	12%	3%	6%	10%	6%	7%	6%	4%	6%	4%	1%	5%	5%
	Challengers	33%	24%	27%	24%	25%	17%	12%	9%	12%	13%	11%	9%	5%	11%	8%	5%	7%	7%	9%
	Traditionalists	44%	28%	28%	29%	28%	14%	16%	23%	10%	11%	8%	8%	7%	5%	5%	7%	2%	5%	4%
	Socialisers	42%	35%	33%	23%	29%	15%	12%	11%	6%	11%	7%	8%	6%	6%	5%	4%	2%	7%	8%
	Creatives	36%	39%	32%	35%	19%	21%	16%	6%	17%	10%	7%	6%	7%	4%	6%	3%	5%	5%	5%
	Achievers	39%	29%	33%	24%	29%	20%	18%	15%	12%	14%	13%	8%	5%	5%	8%	7%	4%	2%	3%

<sup>a</sup>Original question: ‘What are positive aspects of our common European heritage that we should cherish?’

## Rule of law standards

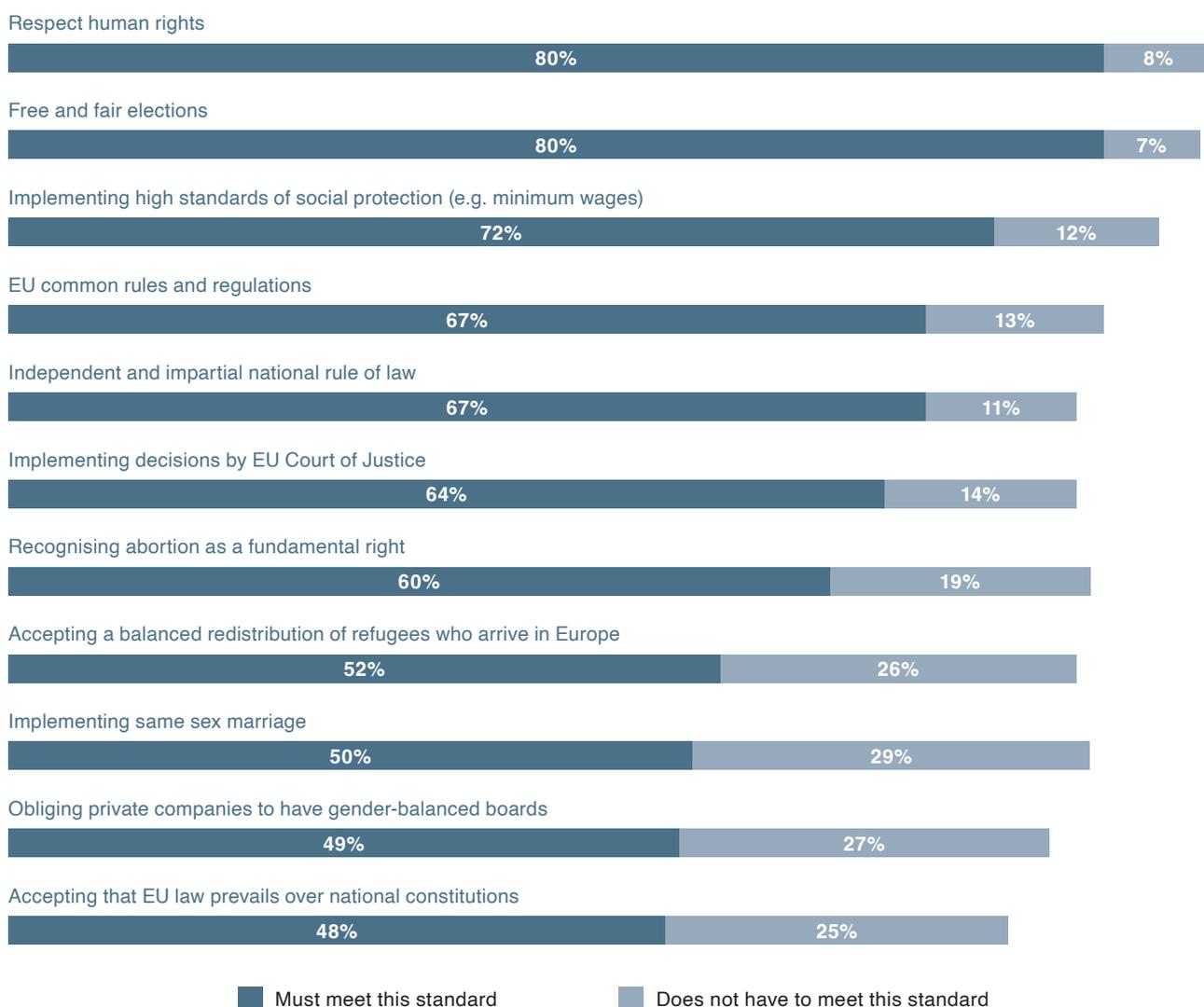
Rule of law standards are the final dimension of EU values. We explored this dimension by asking respondents what they regarded to be the minimum standards that EU member states should meet. We drew up a list of 11 minimum requirements, of which 6 items were procedural rule of law standards (protection of human rights, respecting EU common rules and regulations etc.) and 5 were moral positions which could be considered, or have in the past been considered, EU standards (accepting a balanced redistribution of refugees, implementing same-sex marriage etc.).

The technical rule of law standards are overwhelmingly supported in all EU countries and among all segments, with the exception of the prevalence of EU law over national constitutions. Resistance to this rule of law interpretation is especially strong in Poland, but also resonates more broadly across

Europe. This shows how rule of law support differs depending on the way in which it is framed. After all, the requirement for countries to implement decisions by the EU Court of Justice, supported by 64% (58% in Poland), also implies the prevalence of EU over national law.

Extending EU standards to the moral domain (abortion, same-sex marriage, hosting of refugees) sparks more resistance, especially among certain countries and segments. Recognition of abortion as a fundamental right is largely supported in Europe, but is resisted in certain countries (i.e. Poland) and among certain segments (i.e. Traditionalists). The same is even more true for acceptance of a balanced distribution of refugees, the implementation of same-sex marriage and the obligation for private companies to have gender-balanced boards. The only population segment to embrace the full list as the minimum standard for EU member states is the Creatives.

**Figure 6.4 Minimum EU standards for member states<sup>a</sup>**



Note: The percentages do not add up to 100% because 'do not know' has been omitted.

<sup>a</sup>Original question: 'What do you think are the minimum standards a country should meet when it is part of the EU?'

So what should be done if a member state does not meet the minimum EU standards? Only 6% believe that the EU should not take any punitive measures under any circumstances, while 20% believe that punitive actions should be avoided as much as possible. Among the rest there is quite substantial support for punitive measures, variously by stopping EU funding (which is especially strongly supported in the northern countries), imposing financial penalties (more popular in the southern countries), suspending EU membership (most strongly supported in Sweden) or stripping member states of their voting rights (most strongly supported in Germany, Hungary and the Netherlands).

**Figure 6.5 Support for EU punitive actions against member states violating minimum EU rule of law standards<sup>a</sup>**

	The EU should cut funding to the member state	The EU should impose a financial penalty on the member state	The EU should enter dialogue and avoid punitive actions as much possible	The EU should look at options to suspend EU membership from that state	The EU should start a procedure to strip the member state of its voting rights in the EU	The EU should not take punitive actions towards members states under any circumstances	Do not know
<b>Total</b>	28%	26%	20%	19%	19%	6%	14%
Belgium	28%	22%	20%	18%	13%	5%	17%
France	29%	31%	17%	17%	18%	6%	16%
Germany	39%	28%	15%	21%	22%	5%	14%
Hungary	21%	21%	23%	15%	23%	9%	14%
Italy	28%	30%	17%	20%	14%	5%	13%
Netherlands	35%	26%	19%	20%	25%	4%	15%
Poland	27%	25%	25%	14%	14%	11%	10%
Romania	19%	19%	34%	18%	18%	7%	8%
Spain	26%	31%	20%	20%	22%	4%	12%
Sweden	34%	28%	14%	23%	16%	3%	19%
Challengers	30%	29%	19%	23%	15%	8%	11%
Traditionalists	23%	22%	23%	15%	14%	10%	20%
Socialisers	29%	23%	18%	15%	20%	5%	20%
Creatives	30%	27%	21%	20%	21%	4%	12%
Achievers	28%	34%	18%	18%	18%	6%	11%

<sup>a</sup>Original question: ‘What do you think should be the consequences if an EU member state does not abide by the minimum requirements of EU membership?’

# Research methodology

This research is based on survey data from 10 EU countries: Belgium, France, Germany, Hungary, Italy, the Netherlands, Poland, Romania, Spain and Sweden. These 10 countries were selected because they represented the maximum geographical and cultural diversity of Europe. Data from four surveys were used in this report:

1. *A recent analysis of the Glocalities Global Values Surveys of 2020 and 2021.* The Glocalities Global Survey is conducted by Glocalities on their own initiative on an annual basis. The survey consists of 2 consecutive questionnaires, totalling 45 minutes, and aims to deeply understand people's values, lifestyle and psychology. The results of these surveys were used in the report to analyse the cultural cleavages between EU member states and understand values differences within EU society. The 2020 Glocalities survey was conducted among 49,569 online respondents aged 18–70 (18,594 in the 10 EU countries) between 23 January and 28 March 2020. The 2021 survey was conducted among 22,370 respondents aged 18–70 (9,906 respondents in 9 EU countries, as this wave did not include Hungary) between 18 February and 20 March 2021.
2. *An ad hoc survey into the future of Europe.* This survey was developed in close coordination with the policy staff of the Wilfried Martens Centre for European Studies. The survey was conducted online between 19 November and 19 December 2021 among 5,303 citizens aged 18–70 years in the 10 selected EU countries and lasted approximately 15 minutes.
3. *An ad hoc survey to assess the impact of the war in Ukraine on European public opinion.* Part of the first ad hoc survey was repeated between 8 and 24 March 2022 among 4,715 citizens aged 18–70 years in all 10 selected EU member states. The survey was conducted online and lasted approximately five minutes.

All four surveys used online panels, with quotas set for age, gender, education level and region. Respondents could complete the survey on their smartphones, tablets or laptop/desktop computers. Afterwards the data was weighted based on these same quota criteria (using national census data) and voting behaviour. The data is therefore nationally representative with regard to age (18–70 years), gender, education, region and voting behaviour.

When reporting insights into people's outlooks on life, we standardised the answers by means of z-scores to eliminate cultural or 'answering' bias. This is because people from certain countries or segments tend to agree with statements more than average, which makes it harder to identify

which answers are truly important. By standardising answers to take into account each respondent's answering style, this issue is addressed.

Since certain segments tend to prevail in specific countries (e.g. Traditionalists in Poland and Romania), we weighted the data in such a way that no country dominates the answers when zooming in on a specific segment.

## About the authors

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**Anne Blanksma Çeta** *has been a Principal Researcher at Glocalities since 2016. He specialises in political communications and socio-political trends research. He worked for six years at the Dutch Ministry of Foreign Affairs and was seconded for three years as EU spokesperson in Kosovo. He conducts international research and provides strategic advice to political parties, IGOs and NGOs. He studied human rights and political theory and behaviour in three countries in Europe, including at the Institute for Peace Research and Security Policy of the University of Hamburg.*

**Federico Ottavio Reho** *Federico Ottavio Reho is Strategic Coordinator and Senior Research Officer at the Wilfried Martens Centre for European Studies, where he is responsible for all research on political ideologies, political parties and EU institutions. He previously worked in the EU Institutions and Fora Division of the European Central Bank. He has studied European politics and political economy in four countries in Europe, including at the London School of Economics and the Hertie School of Governance (Berlin). He is also a D.Phil. candidate in history at St Anthony's College, University of Oxford.*

# Future of Europe

## Standing in Unity, Respecting Diversity A Survey Into Citizens' Perspectives on the Future of Europe

ANNE BLANKSMA ÇETA AND FEDERICO OTTAVIO REHO



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Glocalities  
Marnixkade 109 F, 1015 ZL Amsterdam

For more information please visit:

[www.glocalities.com](http://www.glocalities.com)

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