

October 2020

Final report

High hopes, low expectations – Brussels' perspective on the future of Europe after COVID-19

The COVID-19 crisis has sent shockwaves through societies and economies, altering the parameters of politics in Europe and beyond. For Brussels-based stakeholders, pre-pandemic topics like migration, the rule of law or Brexit still matter. However, they have been overtaken by the more immediate need to identify effective reactions to the global health crisis and its multiple economic, societal and political consequences.

Germany holds the Presidency of the Council of the European Union (EU) at this make-or-break moment in European history. In the eyes of many Brussels-based stakeholders, this places enormous responsibility on Berlin's shoulders. They would like the German Presidency and particularly Angela Merkel to bridge existing divisions among the EU27 and use the crisis as an opportunity to promote closer European integration. However, there is much scepticism that Germany can achieve this in its short six-month period at the helm of the Council. A similar duality of hopes and expectations also transpires from how different actors in Brussels perceive the Conference on the Future of Europe (CoFoE): they acknowledge this initiative's potential for much-needed EU reform, but also doubt that it will actually produce meaningful results.

These opinions are some of the headline findings emerging from a study undertaken between July and August 2020 by the Konrad-Adenauer-Stiftung (KAS), the European Policy Centre (EPC) and ifok. 224 individuals from 29 EU and non-EU countries (with Germans slightly overrepresented at 32%) completed an online questionnaire about their main concerns and expectations for the German Presidency in light of the current situation and concerning the Union's long-term future. Respondents ranged from a high number of members of European institutions (30%), think tanks (21%) and non-governmental organisations to business representatives (17%), plus a smaller proportion of diplomats, journalists and academics. The majority of those surveyed are over 40 years of age (63%) and indicated that they carry a substantial degree of job responsibility (69%).

In addition, the project partners conducted 20 personal interviews with high-level Brussels-based stakeholders to deepen the quantitative information collected via the online survey. Although the overall results are not representative in a statistical sense, they do offer interesting insights into the Brussels community's views on topical issues.

More specifically, the online survey and interviews focused on three interrelated thematic blocks: (1) the impact of the COVID-19 crisis on the EU; (2) the Brussels community's expectations for the German Council Presidency; and (3) the Brussels-based stakeholders' views on the perspectives and content of the CoFoE, and the future of European integration process more generally.

Overall, the findings suggest that the proverbial 'Brussels bubble' – a community allegedly out of touch with the preferences and interests at the national level, especially on the subject of further European integration – might be a myth after all. Indeed, Brussels-based stakeholders are **worried about the current state of European integration and 'dream big' for the Union's future**. However, they do not call for deeper European integration as an end in itself. Their support for potential treaty change as an outcome of the upcoming CoFoE, for example, is conditional upon the actual need to amend the Union's primary law. Likewise, **their ambitions to advance EU cooperation is mitigated by a healthy dose of realism**: they recognise the resilience of existing dividing lines between member states and have come to accept the idea that differentiated integration is the most probable course of action henceforth.

That 'Brussels' is made up of 'realistic dreamers' who do not believe that their aspirations can materialise is a story with potentially important consequences for the future of the European project. It is not, however, a story that differs so much from what national-level stakeholders hope for and expect in their respective member states.

The findings at a glance

Brussels-based stakeholders...

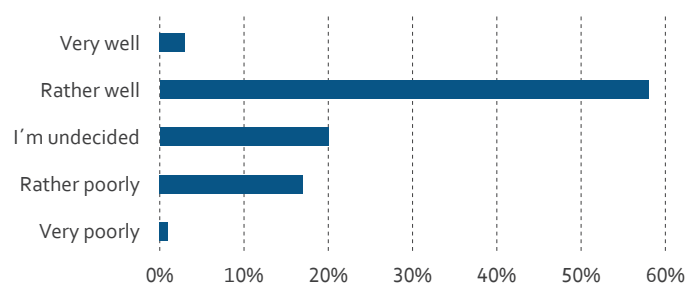
1. ...deem that, overall, the EU handled the COVID-19 pandemic better than commonly perceived.
2. ...hold that the COVID-19 crisis will bring Europeans closer together, and hope that the German Presidency and Chancellor Merkel will set the course for a major strategic reorientation.
3. ...are sceptical whether the German Council Presidency can make major progress on migration and the rule of law, as these are strongly divisive issues in the EU.
4. ...argue that the Green Deal should be a top priority, whereas digitalisation receives less attention.
5. ...have high expectations for the Conference on the Future of Europe but are sceptical of its outcomes, including potential treaty change.
6. ...expect the Conference to focus on longer-term topics of strategic relevance for the Union's future, and not on the immediate priorities related to the COVID-19 pandemic.
7. ...believe that differentiated integration will be necessary to move the EU forward, but are also uncertain about the Union's actual future level of integration.

The seven main findings in detail

1. Brussels-based stakeholders deem that, overall, the EU handled the COVID-19 pandemic better than commonly perceived.

While overall dissatisfied with the Union's initial response to the COVID-19 pandemic, almost 60% of respondents say they are now satisfied ("rather well") with the way the EU has handled the pandemic (see Figure 1). Negative responses ("rather poorly") only amount to 17%.

Fig. 1: How do you rate the current handling of the COVID-19 pandemic at the European level?



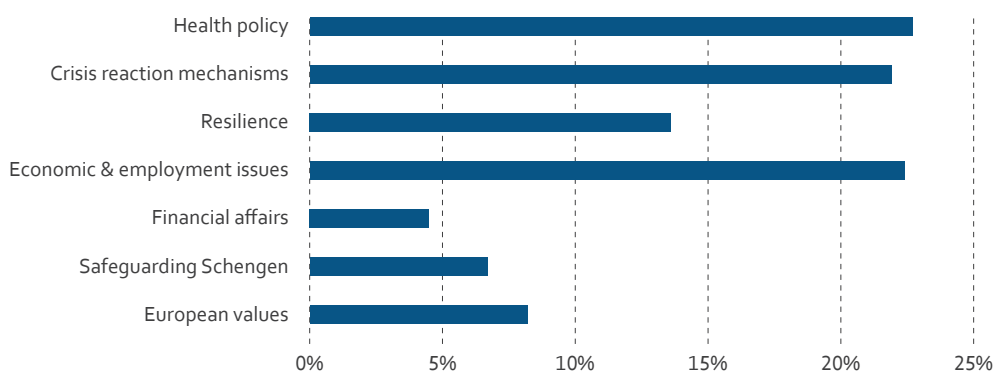
Most participants agree that at the onset of the crisis, the EU lacked coordination and solidarity. "There could have been more solidarity. Many towns and individual hospitals did indeed offer to take patients from Italy at the initial phase of the crisis. But there the effort across Europe was not proportional to the scale of the pandemic, perhaps because solidarity is harder when you fear for your own life or that your own system would not cope," said Paweł Świeboda, Director General of the Human Brain Project, in his interview.

Nonetheless, many respondents assessed that despite the initially clumsy and nationally-driven response, **the EU eventually managed to improve its collective reaction substantially**. Stakeholders point to the easing of state aid, the activation of the general escape clause of the Stability and Growth Pact, the Union's efforts to maintain frictionless trade across the Single Market, and the resolute measures of the European Central Bank as positive and effective responses of the EU institutions. According to the interview with Member of the European Parliament (MEP) Anna Júlia Donáth, "the last couple of months have shown that working together is actually easier, cheaper and more efficient than working apart."

Respondents identified structural factors as key reasons for the EU's slow response during the initial phase of the pandemic. Many referred to **the Union's limited competences in health matters as a major factor for the EU's meandering performance at the beginning of the COVID-19 crisis**. "Given the limited competences of the EU, it has made the most of its available tools," remarked one survey respondent. Whereas most respondents recognise the need for unified and resolute EU action, the expectations of what the EU institutions can actually do for the health crisis are rather modest.

Regarding **the pandemic's consequences for the EU's policy priorities**, respondents acknowledge the new pre-eminence of health policy (23%) and crisis response mechanisms (22%), along with economic and employment issues (22%, *see Figure 2*).

Fig. 2: Which new thematic priorities have arisen at the European level as a result of the COVID-19 pandemic? (Weighted and aggregated results)



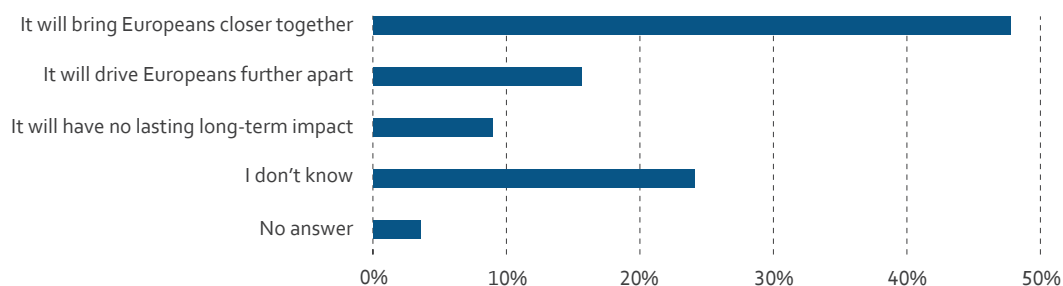
Unexpectedly, Brussels-based stakeholders **do not appear to be concerned about the impact of the COVID-19 crisis on the future of the Schengen area**. Even if some member states responded to the pandemic by closing their borders, the survey respondents seem to interpret this development as a short-term consequence of the crisis. In the long term, they express faith in the stability of the EU's open border system for the freedom of movement of people and goods. This result suggests a high level of confidence in the resilience of one of the Union's most fundamental principles.

Still, many stakeholders caution that this resilience is not a given, and requires renewed efforts at the EU level to safeguard Schengen in the context of the crisis. "I would encourage rethinking what tasks would be better solved at EU level, including, for example, coordination, stock piling, the redistribution of free resources to member states in need, border closures and openings, and so on," one respondent argued.

2. Brussels-based stakeholders hold that the COVID-19 crisis will bring Europeans closer together, and hope that the German Presidency and Chancellor Merkel will set the course for a major strategic reorientation.

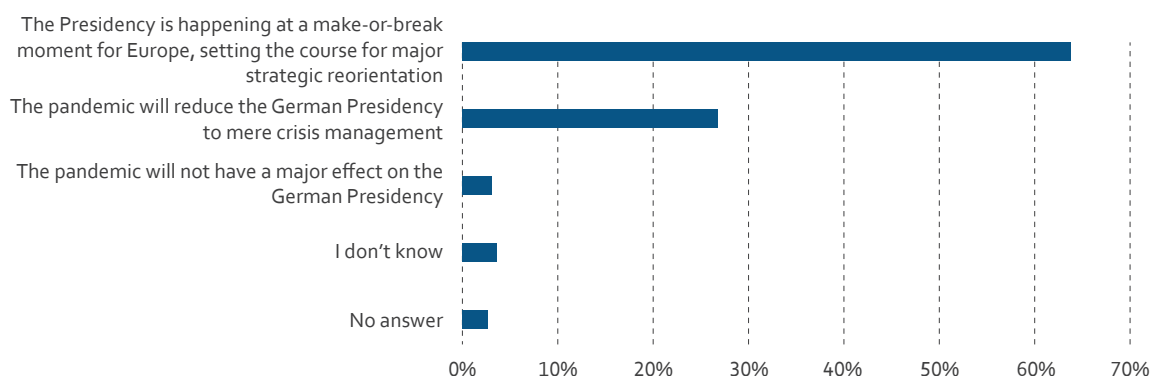
Respondents believe that the COVID-19 crisis has the potential to strengthen European cohesion. Almost half of those surveyed (48%) hold that **this crisis will end up bringing Europeans closer together** (*see Figure 3*). A mere 16% believe that the pandemic will drive Europeans further apart and 24% are undecided, mainly because they assess that it is still too early to tell which direction the Union is heading. "Nobody knows yet. I would say that, for the moment, it's a good sign that an agreement [on the MFF and the recovery instrument] has been found in the European Council," added one survey respondent.

Fig. 3: What long-term effect do you think the COVID-19 pandemic will have on the broader European integration process?



The image of the EU emerging stronger from the crisis is reinforced by responses to questions on the German Presidency of the Council. A clear majority of 64% of respondents consider the **German Presidency to be taking place at a make-or-break moment for Europe, and to set the course for a major strategic reorientation of the Union** (see Figure 4). Only 27% of those surveyed believe that the challenges of short-term crisis management will significantly curtail the scope of the Presidency. This is in line with the perception that despite its immediate challenges, the COVID-19 crisis could lead to an acceleration of the European integration process in the long term.

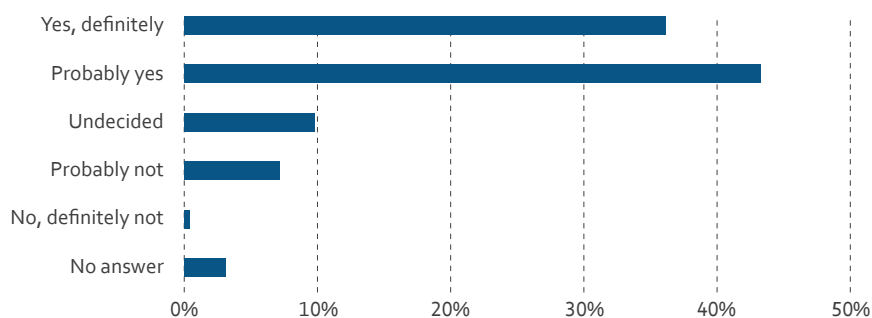
Fig. 4: How do you think the COVID-19 pandemic will affect German Council Presidency?



A closer look at the nationality of respondents shows that non-Germans grant a much higher significance to the German Presidency than Germans themselves. Only 52% of Brussels-based Germans identify a make-or-break moment, compared to 69% of non-Germans with the same view. In a similar vein, 41% of Germans recognise the risk that the Presidency could be reduced to mere crisis management, while only 20% of non-Germans express that concern. This indicates that Germans might be trying to temper their expectations, while non-Germans have much higher hopes for the German Presidency.

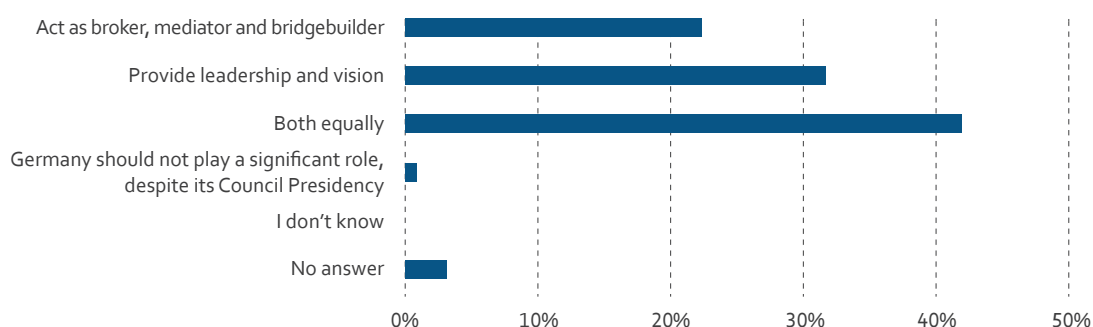
Many respondents believe that Germany is willing to lead the process towards a higher level of integration. A vast majority of 79% (“yes, definitely”, 36% and “probably yes”, 43%, see Figure 5) expect an integration-friendly German Presidency.

Fig. 5: Do you expect an integration-friendly German Council Presidency?



In more concrete terms and **concerning the role Germany should play during its Presidency, the majority of respondents express a complex demand profile.** While leadership and vision (32%) prevail over acting as a broker, mediator and bridgebuilder (22%), it is the combination of both that tops the list (42%) (see Figure 6).

Fig. 6: What role should Germany play during its Presidency?



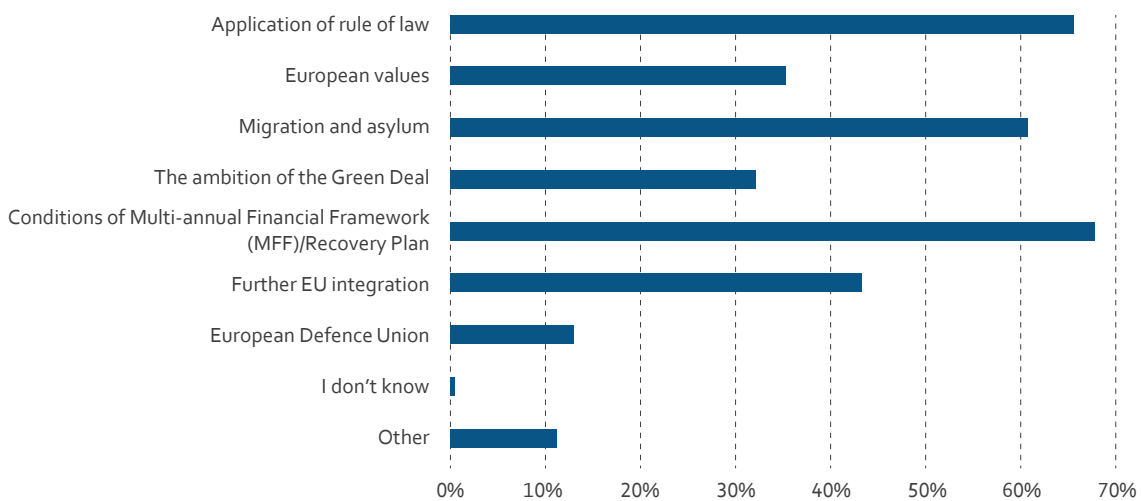
Once again, there are significant differences between German and non-German respondents. While 31% of Germans believe that their country should merely play a mediation role, only 18% of non-Germans share that opinion. **Expectations of leadership and/or vision are much higher among non-Germans.** The interviews conducted suggest that this discrepancy reflects a certain degree of reluctance among Germans when it comes to Berlin assuming a higher level of leadership at the EU level.

Besides structural factors like size, population and economic strength, the survey and consequent interviews show that Brussels-based stakeholders believe that **Germany is particularly well-placed to be a bridgebuilder thanks to Chancellor Merkel.** The Brussels community paints Angela Merkel as an experienced and reliable leader with good personal ties to most members of the European Council, and negotiation skills that can make a difference, particularly with respect to the Multiannual Financial Framework (MFF) and the Next Generation EU recovery package (NGEU). Respondents believe that Chancellor Merkel knows how to provide constructive proposals and get everyone on board. "Chancellor Merkel is a steady, trusted, competent grown-up in the room in a world with too many dangerous maverick leaders who offer no global vision," explains one survey respondent.

3. Brussels-based stakeholders are sceptical whether the German Council Presidency can make major progress on migration and the rule of law, as these are strongly divisive issues in the EU.

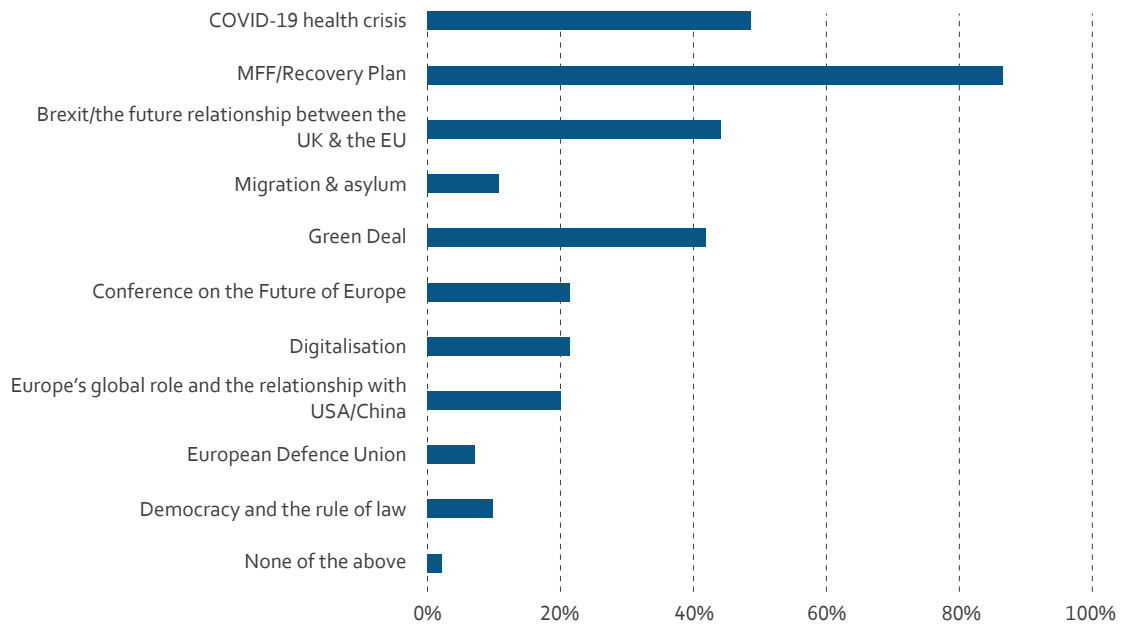
A vast majority of respondents identified the conditions and implementation of the MFF/Recovery Plan (68%), the application of the rule of law (66%), and unsolved migration and asylum issues (61%) as the main dividing lines in the EU (see Figure 7).

Fig. 7: What are the current main dividing lines between the EU member states?
(Multiple answers possible)



Respondents do believe that the **German Presidency will be able to bridge some of the differences directly related to the COVID-19 crisis** (e.g. the MFF/Recovery Plan). However, they have **low expectations when it comes to some of the deep-rooted, controversial issues which have been dividing the EU27 for many years**. More specifically, **migration and the rule of law** are areas where respondents are most doubtful that the German Presidency can make significant progress, especially given the rather short six-month timeframe (see Figure 8). Only 11% of respondents believe that the German Presidency will make significant progress on issues related to migration and asylum, and only 10% hold that this will be the case for the rule of law.

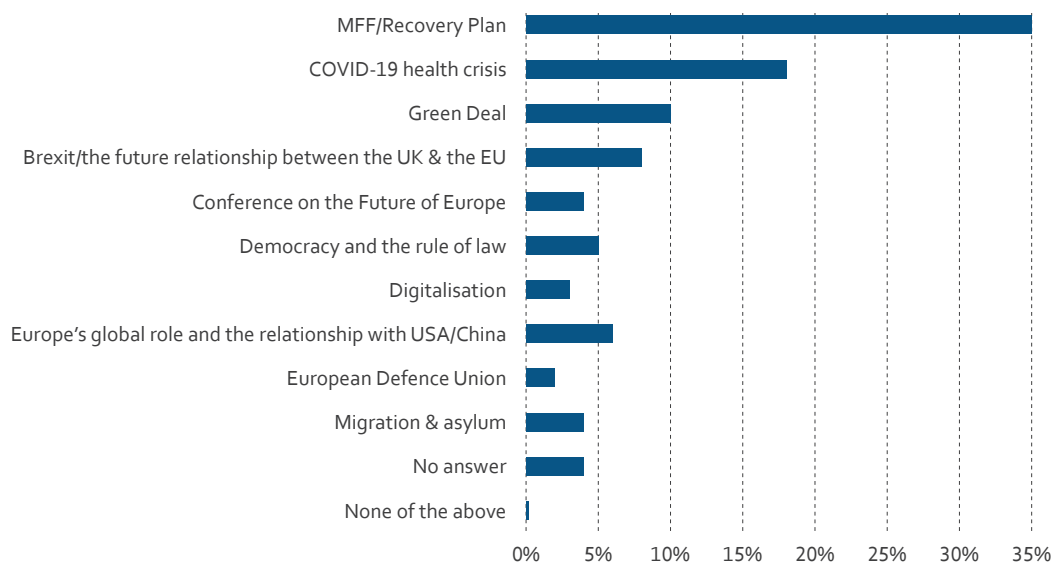
Fig. 8: On which of the following topics do you think the German Council Presidency will make significant progress?
(Multiple answers possible)



4. Brussels-based stakeholders argue that the Green Deal should be a top priority, whereas digitalisation receives less attention.

The Brussels community believes that the Green Deal should remain a strategic imperative for the German Council Presidency. Before the pandemic, this result would not have come as a surprise, given that both the European Commission and European Council have singled out the Green Deal and digital transformation as top priorities for the years to come. However, survey respondents hold that there is now an urgency to deal with the most pressing needs related to the crisis. The MFF/Recovery Plan (35%) and the health crisis (18%) ranked first as the most pressing issues for the German Presidency (see Figure 9). And yet, despite these new priorities, **the Green Deal (10%) remains in the top three most pressing issues** for Germany's six months at the helm of the Council.

Fig. 9: What are the three most pressing issues the German Council Presidency should deal with? (Weighted and aggregated results)



The Green Deal also scores high (42%, fourth place) regarding the topics upon which the German Presidency is expected to make significant progress (see Figure 8). Again, given the reshuffling of policy priorities following the outbreak of the pandemic, respondents hold that the German Presidency especially will help make significant progress to the MFF/Recovery Plan (87%) and the COVID-19 health crisis (49%).

Even if the Commission and European Council identified digitalisation as an important strategic priority alongside the Green Deal before the pandemic, respondents do not regard it as one of the most pressing issues (only 3%, see Figure 9) nor a potential success of the German Presidency (21%, see Figure 8). This is all the more surprising since many interviewed stakeholders pointed out that the crisis has highlighted the importance of digital technologies. “Digitalisation also came into focus during the COVID pandemic because we are doing video conferences and so on, so it became kind of a necessity. Not only for infrastructure but also seeing how we can come forward with the digitalisation policy itself. The pandemic might open the way for a wide approach to digitalisation,” MEP Axel Voss held.

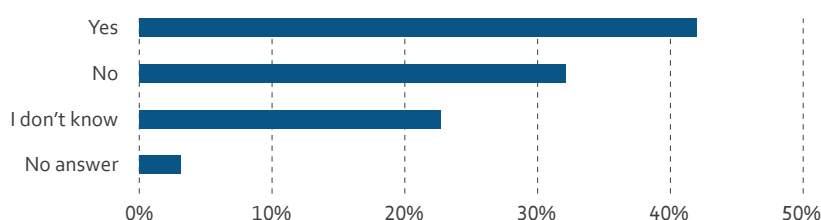
The combined results of the survey and interviews indicate that digitalisation might not be seen as one of the most pressing issues in the context of the COVID-19 crisis. However, Europe's digital transformation is considered to be key for a successful recovery from the negative economic effects of the pandemic. For example, according to Andrew Duff, President of the Spinelli Group and a former MEP, “if we are to entrench the decisions of the Council on the economic recovery programme that the Commission has crafted, new sources of revenue for the Union will have to be set up, and here, digital taxation plays a very important part.”

5. Brussels-based stakeholders have high expectations for the Conference on the Future of Europe but are sceptical of its outcomes, including potential treaty change.

Asked whether the CoFoE should be a priority of the German Council Presidency, 42% of the respondents answered positively, and a third disagreed (see Figure 10).

For the latter, the CoFoE is important, but not urgent when compared to other 'burning' priorities like the MFF/Recovery Plan, Brexit or devising a more immediate response to the COVID-19 health crisis. "Important though it is to think about the Future of Europe, we are in the middle of a very severe health and economic crisis that requires the best use of all available resources" Maria Demertzis, Deputy Director of the think tank Bruegel, remarked in her interview.

Fig. 10: Should the Conference on the Future of Europe be a priority of the German Council Presidency?

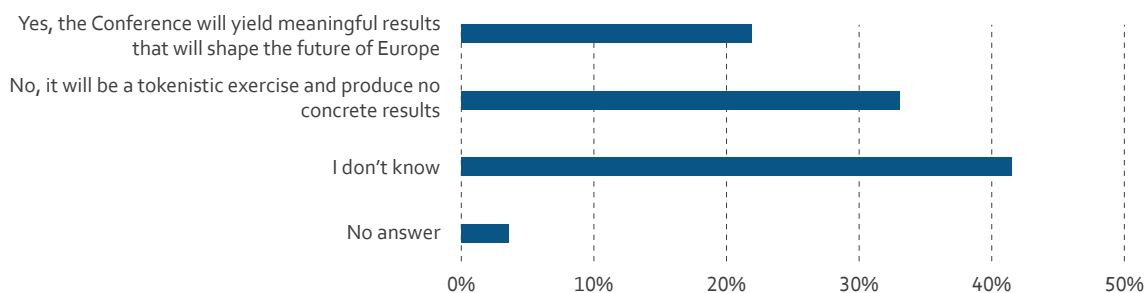


It is also noteworthy that 23% of the respondents answered that they actually do not know whether the CoFoE should rank high on the list of priorities. The interviews conducted suggest that this also relates to the many uncertainties surrounding the CoFoE, given that the European Commission, Council and European Parliament have not yet been able to agree on the Joint Declaration. The Declaration is meant to clarify the timeframe, set-up, leadership and objectives of the CoFoE.

More concretely, there is **much lower support for the CoFoE being a priority of the German Council Presidency among respondents who work for the European institutions** (30%) than those who do not (45%). Also, Germans (49%) rank the role of the CoFoE higher than non-Germans (39%).

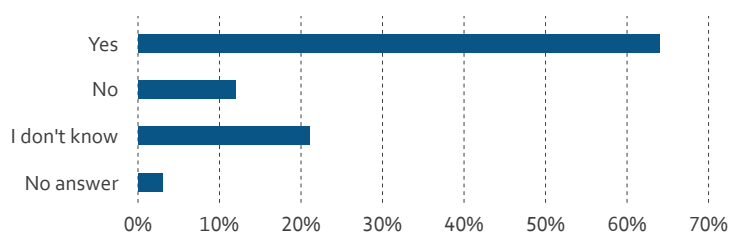
Asked about the potential outcome of the CoFoE, **Brussels-based stakeholders doubt that the initiative will produce meaningful results in the end** (see Figure 11). A mere 22% believes that the outcome will actually shape the future of Europe. A significant 42% are undecided, and 33% believe that it is unlikely to lead to concrete results.

Fig. 11: Do you think the Conference will have a real impact on the future of Europe?



More specifically, concerning a potential amendment of the current EU Treaties, **most participants (64%) hold that the CoFoE should be open to treaty change** (see Figure 12). Support for amending the Union's primary law is higher among respondents who do not work for EU institutions (65%) than those who do (60%).

Fig. 12: Should the Conference be open to an amendment of the current EU Treaties?



Contrary to the hopes expressed by the majority of respondents, the survey and interviews show that **Brussels-based stakeholders doubt that member states would agree to substantial reforms of the current EU Treaties**. The fact that such a step would require a unanimous decision between and ratification in all EU member states goes some way towards explaining the respondents' disbelief. In fact, the Brussels community seems concerned that a precipitated move towards treaty amendment would further divide rather than unite the EU27.

Respondents only supported treaty changes if reforms require an amendment of the Union's primary law. In their view, **whether or not treaty change is actually needed should be the outcome of an open discussion and objective assessment of the current deficits of the EU's current institutional and legal set-up, and not an end in itself**. According to one interviewee, "Institutional reforms should not be discussed as such, but rather be derived from discussions on policy areas where the EU is currently stuck. Then we can see what can be done on an institutional level."

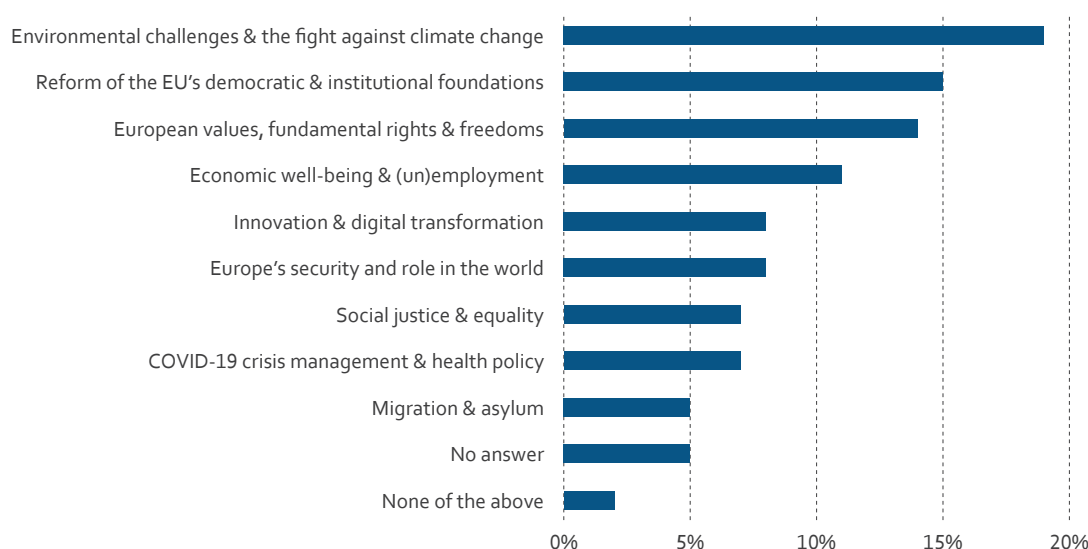
The EU's ability to effectively manage crises and its role in international affairs are areas that are frequently mentioned in this respect. "Although not very old, these treaties do not allow EU institutions to react to crises quickly," another anonymous respondent assessed in the survey. Fostering the Union's democratic principles in an adequate institutional framework, especially via a further strengthening of the role of the European

Parliament, is the second most mentioned reason why respondents believe that treaty change might be necessary.

6. Brussels-based stakeholders expect the Conference to focus on longer-term topics of strategic relevance for the Union's future, and not on immediate priorities related to the COVID-19 pandemic.

Regarding what should be included in the agenda of the CoFoE, issues related to the Green Deal (19%) again leave digitalisation (8%) far behind on the list of priorities (see Figure 13). In fact, **addressing environmental challenges ranks first among respondents' priorities for the CoFoE**, followed by democratic and institutional reform (15%), values and fundamental rights (14%), and economic issues (11%).

Fig. 13: What topics should the Conference address?
(Weighted and aggregated results)



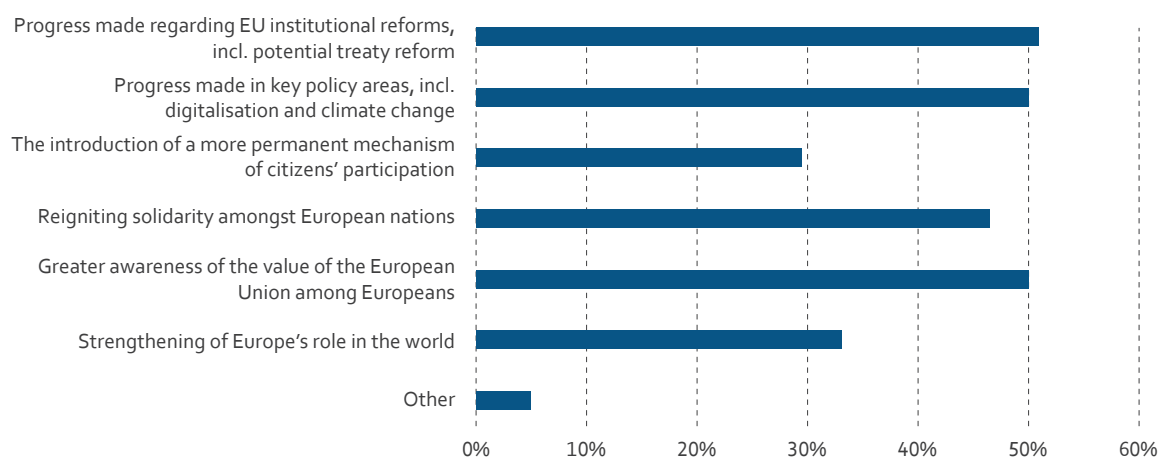
In contrast to what Commission President von der Leyen announced in her first State of the Union Address, when she proposed that the Conference should in particular discuss “the question of health competences”,¹ **Brussels-based stakeholders clearly believe that it should have a broader focus, concentrating first and foremost on longer-term topics of strategic relevance.** This is demonstrated by the fact that “COVID-19 crisis management and health policy” rank relatively low (7%) on the list of topics chosen by respondents.

As regards **the best outcome of the CoFoE**, the survey shows that **Brussels-based stakeholders hold that it should help improve the overall picture of the EU in the eyes of its citizens.** Raising awareness about the Union's value is mentioned as often (50%) as agreeing on concrete progress in key policy areas, including institutional

¹ von der Leyen, Ursula, *State of the Union Address by President von der Leyen at the European Parliament Plenary*, Brussels, 16 September 2020.

reforms, digitalisation and climate change (see Figure 14). Another 46% of interviewees mention the reignition of European solidarity as a possible optimal result of the initiative.

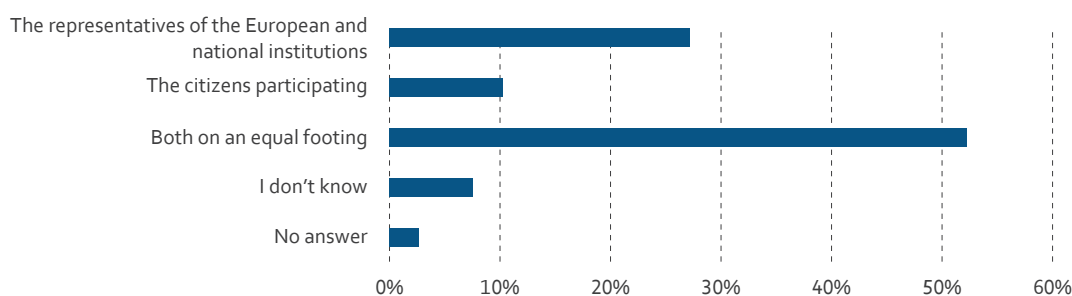
Fig. 14: What would be the best outcome of the Conference?
(Multiple answers possible)



Brussel-based stakeholders seem less enthusiastic about the issue of greater citizen engagement in European politics, which is generally often mentioned as a potential outcome of the CoFoE. Notwithstanding the ongoing debate about this subject, the introduction of a more permanent mechanism of citizen participation ranks relatively low compared to other issues, with only 29% of respondents mentioning it as a core potential upshot of the CoFoE (see Figure 14).

As for who should determine the outcome of the CoFoE, a clear majority of respondents (52%) believe that the **representatives of European and national institutions should decide it on an equal footing with the participating citizens** (see Figure 15). Brussels-based stakeholders hold that the voice of citizens will be an integral factor determining the success of the CoFoE. However, they also do not lose sight of the fact that the EU and its member states operate in a system of representative democracy, in which elected political leaders and representatives assume responsibility for the final decisions.

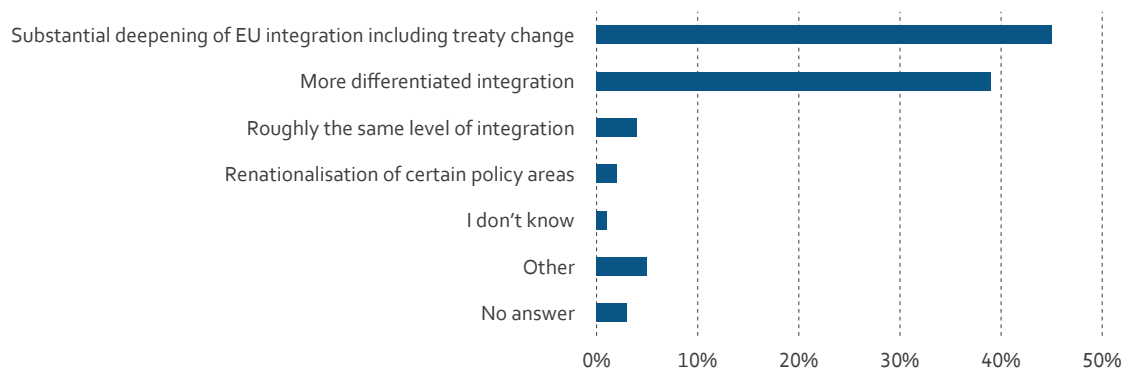
Fig. 15: Who should determine the final outcome of the Conference?



7. Brussels-based stakeholders believe that differentiated integration will be necessary to move the EU forward, but are uncertain about the Union's actual future level of integration.

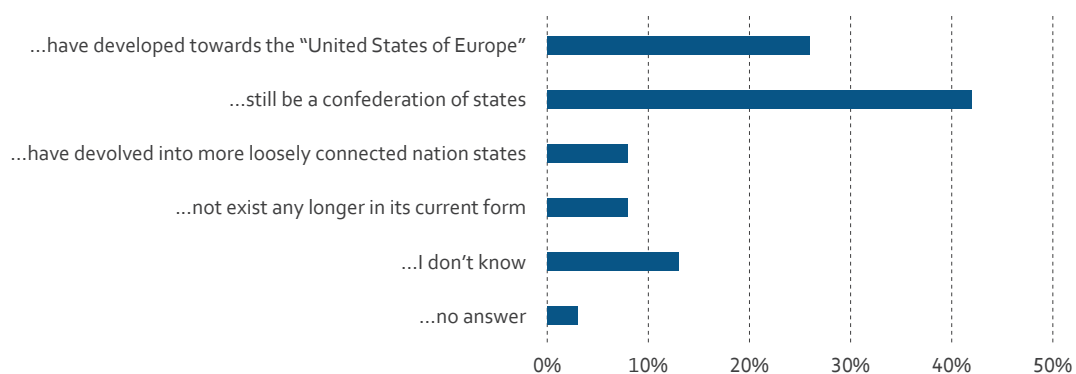
Regarding the Union's longer-term development, a vast majority of Brussels-based stakeholders hold that a substantial deepening of EU integration is desirable (45%, see Figure 16). A high number of respondents believes that this will eventually require a higher level of differentiated integration (39%). Only 4% would like to maintain the status quo, while a minority of 2% favours the renationalisation of certain policy areas. While the commitment of Brussels-based stakeholders to European integration might not be surprising given their strong belief that the EU is a significant part of the solution to some of the EU27's collective challenges, the very high level of consensus that emerges among respondents on this issue is notable.

Fig. 16: How should the European integration process develop in the years ahead?



Despite their rather grand aspirations for the EU, Brussels-based stakeholders disagree on how far European integration will actually progress. When asked what Europe will look like in 2050, 42% of respondents expect the EU to continue to be a confederation of states, while only 26% believe that the Union will develop towards a deeply integrated 'United States of Europe' (see Figure 17). A combined 16% of those interviewed have a more pessimistic view of Europe's future, evenly split between those who expect a more loosely connected union of nation-states and those who envision the end of the EU in its current form.

Fig. 17: By 2050, Europe will...



Even though 39% of respondents believe that the EU should move towards a “substantial deepening of EU integration” (see *Figure 16*), some expect that by 2050, the EU will “have devolved into more loosely connected nation-states” (8%,) or “not exist any longer in its current form” (8%, see *Figure 17*). **The fact that many of those who deem differentiated integration as necessary do not expect it to become a reality signals a clear gap between hopes and expectations; between what Europe ‘should’ and ‘will/can’ accomplish.**

Conclusion

This study shows that there is a discrepancy between what Brussels-based stakeholders wish for when it comes to the future of Europe, and what they believe will actually be possible in the years to come.

On the one hand, the respondents' positive perception of the Union's management of the COVID-19 crisis and their openness towards a more deeply integrated EU suggest that Brussels-based stakeholders continue to value the European integration process. Transitioning the Union into a 'greener' and more climate-friendly future remains a top priority despite the requirements of short-term COVID-19 crisis management. Brussels-based stakeholders have high hopes for the German Council Presidency's and Chancellor Merkel's ability to foster agreement in the context of the COVID-19 crisis. They also hope that the CoFoE will deal with the issues most important for the Union's long-term future.

On the other hand, there are serious doubts within the Brussels community as to whether the German Council Presidency can bridge the deep-rooted dividing lines between member states on issues like migration or the rule of law. This scepticism transpires despite respondents' belief that the German Presidency, particularly Chancellor Merkel, is generally well-placed to provide leadership and set the course for a strategic reorientation of the Union. Uncertainty surrounding how far the European integration process can go and to what extent the CoFoE can lead the way towards a more deeply integrated Union also prevails.

The gap between what many Brussels-based stakeholders deem necessary and realistic is linked to a widespread perception that member states often lack a common assessment of how to deal with certain challenges. This is also associated with the circumstance that the EU27 do not always share the same values. There is a general belief that the EU can only move forward and deepen European integration if national capitals are convinced that it is in their interest. However, this does not mean that there is a consensus that the EU has a common destiny whereby member states must move forward together, or else fail together.

Many in the Brussels community hold that a higher level of differentiated integration will be unavoidable if the EU is to move forward in the years to come. However, whether treaty reforms are necessary to deepen European integration further is, for many, not a foregone conclusion but rather an option that should be pursued with an open mind.

Concerning the CoFoE, respondents believe that it should concentrate on topics of strategic relevance. From this perspective, Brussels seems to be on the same wavelength as the German Council Presidency. In July 2020, reflecting on the lessons learned from the COVID-19 crisis in a speech before the European Parliament, Chancellor Merkel argued that the Conference should "concentrate on just a few issues, promising concrete

results and bringing citizens from and in different member states together for discussions.”² Such a pragmatic, inclusive and deliberative approach to European cooperation and/or integration suggests that Brussels' thinking might not be so 'distant' from that of national capitals after all.

Thus, the danger is not so much that Brussels-based stakeholders 'dream bigger' than the member states. All Europeans hope, which is both courageous and important to achieve progress in times of crisis. Instead, the greater risk seems to be posed by the respondents' constant reality checks and perceptions of what is actually possible. These perceptions could become a self-fulfilling prophecy: Dreaming without believing can eventually breed cynicism and result in choices that reflect not our high hopes but merely our low, pragmatic expectations. In return, this could prove insufficient in light of the severe challenges we are all facing.

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² Merkel, Angela, *Speech by Federal Chancellor Angela Merkel on the German Presidency of the Council of the EU 2020 to the European Parliament in Brussels on 8 July 2020*, European Parliament, 08 July 2020.