



The Europeans and the Brexit

In the aftermath of the referendum in the UK, how have Europeans reacted to the country's vote to leave the European Union? In order to have the benefit of a large-scale opinion poll, [Fondation Jean-Jaurès](#) and FEPS (the [Foundation for European Progressive Studies](#)) asked French pollster [Ifop](#) to conduct an opinion poll among the populations of six EU countries, namely France, Germany, Italy, Spain, Belgium and Poland. How does public opinion gauge the consequences of Brexit in these six member countries (who joined the EU at different moments in time)? Has this given rise to a reassertion of pro-European feeling? How do people now envisage the future together?

Perceptions of Brexit and diagnosis of the consequences

Reactions to Brexit highly contrasted from one country to another and within countries

After the majority in Britain voted in favour of leaving the European Union, it would appear that public opinion in Europe has reacted in a highly contrasted manner. The first part of the explanation is that this is an unprecedented situation with great uncertainties regarding the next stages, but there is also the fact that, in each of the countries polled, citizens reacted not only on the basis of their perceived impact of Brexit on Europe and on the economy of their own country, but also on the basis of their relationship to the European Union (EU). For instance, in a country like Germany where pro-European sentiment is deeply rooted and where it is unlikely that Brexit will weaken the strong domestic economy, the predominant feeling is one of incomprehension (mentioned by 45% of respondents), well ahead of concern (17%) or understanding (15%). Conversely, in a distinctly more Eurosceptic and economically less efficient country like France, reactions were much more varied and incomprehension was mentioned less than half as frequently (22%) as in Germany, this sentiment being symbolically and very closely beaten by understanding (23%). Finally, in Spain and Poland, two countries that are very different to one another but that nonetheless have in common that they joined the EU more recently than others and that their economies are in a relatively fragile situation, the predominant feelings were concern (respectively 28% and 31%) followed by incomprehension (20% and 19%).

An exit that is not perceived as all that serious ...

The victory of the Leave camp was like a thunderbolt for the media, the world of politics and the financial markets. Without minimizing the consequences of this vote, public opinion in Europe, quite consistently throughout the continent, did not appear to be completely appalled. For instance, in France 58% felt that it is not all that serious since the UK has always had a special status within Europe and has always hindered progress with the construction of Europe. This same reaction was observed in Italy (49%), in Belgium (47%) and in Germany (41%). At the other end of the spectrum, only a minority considered Brexit to be very serious insofar as one of the main member states and one of the principal economies will now be leaving the EU.

The perceived seriousness of the UK leaving the European Union

Question: The UK— which is not in the eurozone and not part of the Schengen area —is now about to leave the European Union. In your opinion, the UK exit from the EU is ...?

What puts Brexit into perspective is the UK's special status within the EU and the fact that it is in neither the eurozone nor the Schengen area. In each of the countries polled, there was a significant minority that considered Brexit to be relatively serious but not as serious as if another large eurozone country (such as France, Spain or Italy) had left the Union.



On this issue as with others, Poland stands apart and appears to be much more concerned because of its strong ties with the UK. These ties notably include the presence of 800,000 Poles in Britain – a presence denounced throughout the campaign by the pro-Brexit camp as causing unfair competition in the labour market, saturating the national healthcare system and driving up property rent – but also their shared status as EU member states without being in the eurozone, as well as positions that often converge on European matters (free trade and weak commitment to integration).

... but considerable uncertainty regarding the consequences of Brexit on national economies

When asked about the expected impact of Brexit on their domestic economies, there was widespread uncertainty – which is quite logical insofar as a) the situation is without precedent on which to base opinion, and b) expert opinion on this very recent matter is highly divided, often arriving at opposite conclusions. Certain citizens believe the continental economies will benefit from the relocation and transfer of activities from the UK, while others stress first and foremost the adverse effects Britain's economic slowdown will have on Europe's economies, the UK being one of the main trading partners of the majority of EU member states.

In this context, a relative majority of respondents felt unable to express an opinion on the indirect consequences of Brexit. This was the case of 48% of the French, 45% of the Italians and 42% of Belgian respondents. In these same countries, when respondents did express an opinion, there was a relatively balanced proportion of positive and negative opinions. For instance, in Italy, 29% replied "This will provide opportunities for our economy" versus 26% who felt "This will weaken our economy". Uncertainty concerning the impact of Britain's decision was much lower in Germany given the confidence in their domestic economy. Admittedly, 32% of German respondents could not decide between a positive and a negative impact, but that is 16 points less than in France and 13 points below the Italian score, for example. At the same time, "Brexit will provide opportunities for the German economy" ranked highest with a score of 39% as opposed to 29% who fear a weakening of the German economy, bearing in mind that Germany recorded the highest proportion of optimistic responses of the six countries polled. The crisis initiated by the UK vote is quite revealing of regional economic weaknesses, with concern exacerbated in the least vibrant regions while territories with better economic momentum see this primarily as a source of opportunities. For instance, in Germany, the inhabitants of the former East German provinces of Brandenburg, Saxony-Anhalt and Mecklenburg symbolically gave the highest ranked to a "weakening of the economy" (33%), ahead of 31% who considered this new situation would create opportunities. Not so in the industrial and financial heart of Germany (Hessen, Baden-Württemberg and Rhineland-Palatinate) where those scores arrived at the order end of the ranking with 25% and 42% respectively. The same opposition existed in France between, on the one hand, the relatively concerned north-eastern quarter (23% opted for "more likely to weaken the French economy" versus 28% who believed "this will create opportunities") and, on the other hand, the Île-de-France region around Paris which was much more optimistic, returning scores of 22% and 39% respectively.

Prognosis regarding the impact of Brexit on the national economy

Question: In your opinion, the UK leaving the European Union will ...?

The Polish results were the complete opposite of the trends observed in Germany. Whilst Poles were the most numerous in not knowing what to expect (34% expressed no opinion), 40% said they feared a weakening of the economy, compared with 29% in Germany and 21% in France, for example. More Polish people expressed concern than any of the other nationalities polled. Poland's status as an emerging economy and relative newcomer to the European Union no doubt explains the fact that the Poles were less confident than the Germans about the ability of their economy to withstand this turbulence, all the more so that one cannot entirely rule out a large-scale return of Polish expatriates



currently employed in the United Kingdom, which could destabilise the local labour market and put an end to these expatriates sending currency back to Poland.

The same configuration was found, though to a slightly lesser extent, in Spain where the economic difficulties give rise to concern over the consequences of Brexit. Spain is the second country where fear of the domestic economy being weakened was higher (35%) than the proportion of people who felt the victory of the Leave camp was a source of opportunities (25%), though a large minority of Spaniards (40%) did not have an opinion on this matter. The fear (not of expatriates returning home, as was the case in Poland) of a substantial decrease in the number of British tourists, who represent a high proportion of the foreign tourists visiting the Iberian Peninsula, undoubtedly exacerbated concerns about the negative fallout from Brexit.

Mainly negative expectations regarding the British economy

Though the impact of Brexit on European construction does not seem insurmountable, and while the perceived consequences for domestic economies are - for the moment anyway and with the exception of Poland - not too gloomy for the majority of Europeans, a very large number of these same Europeans expect this decision to have recessionary effects on the British economy. Quite logically, the more public opinion in a given country is convinced of the benefits of belonging to the EU, the more it expects the British economy to be weakened by this exit decision. This is the belief of 69% of the Germans, 66% of the Spaniards, 65% of the Belgians, 62% of the Poles, 55% of the French and 46% of the Italians. In all these countries, the “neutral” impact option (“the British economy will be neither stimulated nor weakened by this decision to leave the EU”) scored considerably lower than the “neutral” response concerning the impact of Brexit on their domestic economy. It is as though public opinion in Europe had a much clearer idea about the (negative) consequences of Brexit on the British economy than about the consequences of this situation on the economic activity of the other member States.

Prognosis concerning the economic future of the UK

Question: Over the forthcoming months and years, do you think the British economy will ...?

On this issue, sovereigntists can be seen to have lost the battle for public opinion insofar as now, and despite the fact that the UK's exit process has only just begun, in all the countries polled the proportion of respondents expecting negative consequences for the UK is much higher than the proportion expecting Brexit to stimulate the economy by providing the UK with the oxygen and leeway it lacked within the confines of the EU. The future will decide the answer to this question, but, in the meantime, the dominant sentiment is very distinctly that Brexit does not bode well for the British. Throughout Europe, this sentiment is working against parties who want a referendum in their own country in the hope that they will follow in the footsteps of the British. Even among extreme right electorates – with the exception of Lega Nord in Italy and the KPN in Poland – sympathisers anticipating difficulties for the British economy are more numerous than those who expect a boost.

Prognosis concerning the economic future of the UK among Europe's different extreme right electorates

The bond with Europe is reasserted

Greater importance attached to belonging to Europe

One of the main observable consequences of the victory of the Leave campaign is that many people now see greater benefits in belonging to the EU. It is as though the period of uncertainty, that



became a brutal reality when the British voted, suddenly revealed to other countries the benefits of belonging to the EU, at least more clearly than in the past. In Germany - where throughout this poll public opinion stands out as the most pre-European – the scores and trends are spectacular. In fact, 81% of Germans now feel that it is quite a good thing that their country is a member of the EU, an opinion that is up 19 points up on November 2014 and an increase that is all the more noteworthy that this indicator had been remarkably stable in all the polls conducted by Ifop in Germany since December 2010 (right in the middle of the economic and financial crisis). The upswing is less remarkable though very real nonetheless in France where 67% of the respondents (10 percentage points more than in November 2014) see their belonging to Europe as quite beneficial for the country, whereas in Belgium the proportion is 75% (+10 points). As can be seen on the graph below, the upward trend is of similar amplitude in Spain (81% i.e. +9 points by comparison with January 2014), despite the fact that this item has always rated higher in Spain than in France. As for Poland, which is the most recent EU member of the six countries polled, we do not have previous measurements with which to establish a comparison, but no less than 89% of the population acknowledged the benefits of being an EU member.

Opinion curve concerning one's country belonging to the EU

Percentage that replied "quite a good thing"

However, the situation in Italy is strikingly different. As shown by the curves below, whilst the benefits of EU membership scored identically in Spain and Italy in June 2011, Euroscepticism has been constantly gaining ground in Italy, so much so that the difference between the two countries has become very substantial (Italian opinion is closing the gap with France, the two now being virtually aligned). The divergence is all the more surprising that austerity policies (aimed at remaining in the eurozone, reducing the fiscal deficit and enhancing competitiveness) have proved more painful in Spain than in Italy. Despite that, public opinion concerning the benefits of EU membership has remained at a very high level in Spain while plummeting in Italy. A further sign of Euroscepticism taking root in Italy is that, while Brexit has led to a sharp rise (in the region of 10 to 20 points) of this indicator in the other countries, the pick-up in Italy was much less significant (a mere +4 points). As will be seen in the next graph, while this upswing was spectacular among the higher socio-professional categories (SPC+) in Italy, the downward trend of recent years among the working class categories has not been corrected.

How acceptance of EU membership being quite good for Italy has evolved in the different socio-professional categories in Italy

The comparison between Spain and Italy enables us to posit another type of explanation different to the one based solely on economic policy. Because of Spain's history, many Spanish people associate joining Europe with the end of the Franco regime. Despite the harshness of structural adjustment policies in recent years, their commitment to Europe remains very strong as a result of their particular historical context, something that the Italians have not experienced. Across the Italian peninsula, where the debt crisis also took a heavy toll, the notion of belonging to Europe – which in Italy is not synonymous with the return of democracy – has been severely tested throughout the years of economic crisis. In addition, we must undoubtedly factor in the migrant crisis where Italy, unlike Spain, has been on the front line for several years. This is a crisis that has put Italian society under pressure, while cruelly revealing the limitations of solidarity in Europe and how powerless community institutions have been in the face of this situation.

While the size of the shift in opinion on the benefits of EU membership post-Brexit differs between France and Germany, trends tend to be aligned within the different political families, with one exception to the rule. As a result of Brexit, recognition of the benefits of EU membership rose very significantly among voters on the left of the left-wing on both sides of the Rhine. These trends are very closely aligned, though not of the same order of magnitude, among socialists and conservatives.



Conversely, while the increase is as high as 24 percentage points among AfD supporters, the Brexit effect is not nearly as high among FN voters (a mere +5 points).

How acceptance of the notion of EU membership being quite good for one's country has evolved in France and Germany by political persuasion

	November 2014	June 2016	Variation
France			
Overall population	57%	67%	+10 pts
Front de Gauche	50%	70%	+20 pts
PS	76%	85%	+9 pts
Les Républicains	74%	84%	+10 pts
FN	25%	30%	+5 pts
Germany			
Overall population	62%	81%	+19 pts
Die Linke	52%	75%	+23 pts
SPD	83%	92%	+9 pts
CDU/CSU	75%	89%	+14 pts
AfD	15%	39%	+24 pts

For the moment, there is no reason to expect a domino effect ...

Although the media raised the possibility of a domino effect with referendums being held all over Europe, public opinion seems very divided over this scenario and not very inclined to want this to happen in their own country.

In Germany, Spain, Poland and Belgium, four countries where the majority is pro-European, the largely predominant idea is that of a new momentum for the European Union which would also emerge reinforced (54% in Germany, 47% in Spain, 44% in Poland and 41% in Belgium), whereas the idea of other countries leaving the Union – leading to a dissolution of the EU – achieved significantly lower scores (27% in Germany, 28% in Spain and 32% in Belgium and in Poland). The French too believe the crisis will prove beneficial, though the percentages are lower (37% versus 32% who believe there will be other leavers). Belief in a domino effect is more widespread in Italy where 41% chose the item according to which other members will leave the EU, versus 36% who chose the idea of a fresh momentum for Europe.

Despite the prognosis regarding Brexit having a knock-on effect varying from one country to another, Europeans are much more categorical and their views converge when asked for their opinion about holding a referendum in their own country. In all six countries, majorities of varying degrees clearly oppose any such initiative.



The wish to have a referendum on whether one's country should leave or remain in the European Union

Question: Do you think your country should hold a referendum on whether your country should leave or remain within the EU?

Opposition was strong in the founding countries, with 59% opposing any such initiative in Germany, followed by 54% in France and in Italy. Opposition to the idea was even stronger in countries that joined the EU more recently, with scores as high as 67% and 66% against the idea in Poland and Spain respectively. It should be noted that in Spain, Catalonia stands out with a score of 45% in favour of a referendum, compared with only 30% in the Madrid region and 29% in Andalusia. The post-Brexit debate around Scotland leaving or remaining in the United Kingdom resonated strongly in Catalonia where pro-independence and pro-autonomy forces run deep, the latter considering that every institutional change is an opportunity to further their cause, unlike the Castilians who remain deeply attached to the Spanish national framework.

These figures on whether or not a referendum would be a good thing in the different countries become clearer when compared with other findings relating to the same type of question. Large majorities usually emerge when respondents are asked if they would like to see the people consulted by referendum. Traditionally, we have found that these questions produce very high scores irrespective of the issue. For instance, in France in 2014, 58% of respondents considered that proposed mergers of regional authorities should be put to a referendum, and in 2012, 66% wanted the government to consult voters on the issue of same-sex marriage. This same order of magnitude, i.e. approximately six respondents out of ten, was found in a more recent poll on Europe. Last March, prior to the Dutch referendum by popular initiative on the Association Agreement between Ukraine and the EU, 66% of the Italians and 63% of the French and Germans wanted a similar referendum held in their own country. This contrasts very sharply with the scores returned today which are on average 20 percentage points below what we usually find, clearly demonstrating that Brexit has not caused public opinion to want a referendum. Quite the contrary, in fact.

This shows the influence of opinion concerning the consequences of Brexit for the British economy. Insofar as a large majority expect the UK economy to experience serious difficulties subsequent to its decision to leave the EU, a very large number of Europeans are not at all prepared to conduct the same experiment in their own country. What we find is that, in each country, there is a very clear correlation between the prognosis of the consequences of Brexit for the British economy and the willingness to have one's country hold a similar referendum.

The willingness to have one's own country hold its own referendum compared with the prognosis on the consequences of Brexit on the British economy

Country	Respondents who feel the UK economy will be strengthened	Respondents who feel the UK economy will be neither strengthened nor weakened	Respondents who feel the UK economy will be weakened
Spain	82%	45%	21%
France	80%	60%	29%
Belgium	79%	45%	24%
Italy	74%	47%	30%
Germany	70%	61%	32%
Poland	65%	41%	24%



What this tells us is that the UK's economic performance in the months and years to come will have a considerable bearing on public opinion in Europe. If the UK posts an enviable growth rate, good trade dynamics and low unemployment, the proponents of a referendum to leave the EU will receive a lot of public attention on the continent. Conversely, if the UK economy appears to fare very poorly subsequent to Brexit, the advisability of such an option would be much less obvious, and in this instance the UK would serve as a case study of how things should not be done.

For the moment at any rate, public opinion in Europe seems to have made up its mind. Based on what has happened in the UK in the days following the Brexit decision, leaving the EU would appear to be very risky and very damaging. As we have seen, the idea of a referendum is therefore rejected by quite a large majority. However, were a referendum to be held, even larger majorities would vote in favour of remaining in the European Union. In fact, between 63% (Italians) and up to 84% (Poles) would vote against leaving the EU. In the light of these figures, the scenario of a series of exits is not currently on the agenda since Brexit has clearly boosted the perceived benefits of EU membership. This very powerful current of public opinion is in evidence when we compare, for instance, the score reached in France with regard to remaining in the Union, with the results of the two major European referendums of 1992 and 2005. Admittedly, the issue at the time of the Maastricht vote and the European Constitutional Treaty (ECT) was not about France leaving or remaining in the EU, but these two campaigns clearly opposed a pro-Europe camp and the sovereigntist, Eurocritical camp. The latter achieved 49% in 1992 and 55% in 2005. The falloff currently observed (even though today's issue would have much greater implications than the vote to approve a constitutional project) is apparently much lower with a mere 33% in favour of "Frexit" (French exit).

When these results are compared with the balance of power observed at the time of the Maastricht vote, the pro-Europe camp has gained 16 points. However, as shown in the chart below, the sociological split between the upper and lower echelons of French society (respectively *France d'en haut*, *France d'en bas*), already in evidence in the two above-mentioned referendums, is still very much alive insofar as the majority of workers and employees would vote to leave the EU.

Variations in pro-European sentiment by socio-professional category in France

	% "Yes to Maastricht" (1992)	% "Yes to the ECT remain in EU" (2005) (2016)	% "France to remain in EU" (1992 / 2016)	Variation
Overall French population	51%	45%	67%	+16 pts
Craftsmen / Tradespeople	43%	47%	62%	+19 pts
Independent professions / Senior executives	70%	62%	82%	+12 pts
Retirees	56%	59%	81%	+25 pts
Intermediate professions	58%	54%	74%	+16 pts
Employees	44%	38%	45%	+1 pt
Workers	42%	26%	47%	+5 pts

There has been virtually no change in pro-European sentiment among the working classes since 1992, whereas the increase is 12 points among the upper socio-professional categories (who were already massively convinced) and 25 points in the case of retirees, making these two categories the two staunchest pillars of pre-European sentiment in France. Furthermore, the increase among the intermediate professions was 16 points, meaning the middle classes have clearly established themselves in the pro-Europe camp after being quite divided back in 2005.



These figures beg two comments. The first is that the split between the upper and lower socio-professional categories (SPC+ and SPC-) exists in most European countries. In the event of a referendum, voting intentions in favour of the Remain camp would be 84% among the German SPC+ (10 points more than the SPC-), 82% among the Belgian SPC+ (versus 72% of the SPC-), and the gap would be even wider in Italy (74% of the SPC+ but only 51% of the SPC-).

The second comment refers us back to the UK vote. Investigations show that there is also a very clear-cut sociological split in Britain, as revealed by the Lord Ashcroft's polls.

UK referendum vote by social class

However, if we compare these scores with those observed in France at the time of the Maastricht or ECT referendums, we find that the British middle classes have symbolically leaned towards the Leave camp, whereas in 1992 and 2005 the majority of their French counterparts voted in favour of the EU, despite their divisions.

... and no reason to expect an exit from the eurozone

Notwithstanding that the majority of public opinion rejects the idea of holding referendums and that the vast majority of people polled would vote for the Remain camp, we find firstly that the wish to abandon the euro is only supported by a minority in most countries (43% in Italy, 33% in Germany, 31% in Spain). Secondly, after Belgium with 25% in favour of leaving the eurozone, France had the second-lowest score with a mere 29% in favour of reinstating the franc. The post-Brexit period has also revealed that the wish to return to national currency has weakened in most countries (by 9 points in France compared with the results of a poll conducted in January 2014). As shown by the chart below, the downswing is particularly sharp in Germany where the willingness to bring back the mark is at its lowest since 2011.

Willingness to reinstate national currency

*Question: Would you like your country to abandon the euro and reinstate the mark?
("Yes" answers)*

In Germany, this decline in willingness to exit the eurozone is spectacular among the intermediate age groups which count the highest number of people in employment and are traditionally tempted by this breakaway scenario, since the willingness among 35-49 year olds to bring back the mark has dropped from 53% in January 2014 to 35% today, i.e. an 18-point decrease. Similarly, the decline is much sharper than average among left-wing voters in Germany, from 62% to 24% among Die Linke supporters (-38 points) and from 37% to 18% (-19 points) among SPD supporters. At the same time, the trend is less marked in the ranks of CDU/CSU, who even back then were less tempted by the idea of abandoning the euro (28% in January 2014 versus 22% now). Though the Christian-Democrat electorate may seem quite close to their AfD counterparts in certain thematic areas, there is a huge divide between them concerning this issue of reinstating the mark, an area where they are completely opposed to one another. In fact, 73% of pro-AfD voters want the mark back, whereas 78% of CDU/CSU supporters want to retain the euro.

The same type of split is to be found in France, though to a less extreme degree. Among supporters of Les Républicains, 85% would prefer to remain in the eurozone while 63% of those close to FN support the party line to bring back the franc. Over one-third (37%) of FN voters do not support this major objective championed by Marine Le Pen and Florian Philippot. However, this breakaway position continues to have the support of close to half of the working classes (48% of workers and employees) who have set themselves apart from the rest of the population on this particular issue as



only 17% of the SPC+ categories and intermediate professions and only 16% of retirees want to exit the eurozone.

In France and Germany, only the supporters of extreme right parties FN and AfD have a majority in favour of abandoning the euro, unlike Italy where the idea holds much broader appeal. Not only are Lega Nord's supporters aligned with their French and German counterparts (64% in favour of abandoning the euro), but, as shown in the chart below, the wish to reinstate the lira also has the support of the majority of supporters of conservative party Forza Italia (52%) as well as of the majority of supporters of the Five Star movement (57%).

Willingness to bring back national currency only has the support of the majority of extreme right supports (except in Italy)

It is because this willingness to reinstate national currency extends far beyond the reaches of its extreme right that Italy has by far the highest score in Europe (41%) in terms of support for the idea of abandoning the euro. In Spain, where the wish to break away is not nearly as strong (31%), only two political persuasions are in favour: Podemos (51% of supporters) and Izquierda Unita (47%), the latter formation corresponding to France's Front de Gauche. Partido Popular voters are very opposed to this idea (only 15% in favour), as are the supports of centrist party Ciudadanos (25%), PSOE (31%) or the regionalist parties (Basque, Catalan etc.) with 31%.

Expectations of the EU subsequent to Brexit

Public opinion in Europe not very inclined to make concessions to the British

Against a backdrop of uncertainty regarding the impact of Brexit on continental economies – uncertainty that could be exacerbated if the exit process were to drag on and on – in most of the countries polled, quite clear majorities emerge around the notion that the EU should not make any concessions to the British and should quickly withdraw all economic and trading benefits associated with EU membership. This intransigence announced by François Hollande, and then by Angela Merkel, is expected by no less than 55% of the Germans, 53% of the French, 51% of the Spaniards and 47% of the Belgians. In these countries, the item “The EU should take a very conciliatory stance with the British and uphold as many preferential economic and trading agreements as possible between the EU and the UK to avoid the latter really leaving the European Union” – which was the most lenient position proposed – was very much a minority position, with scores of between only 10% and 12%. The intermediate position (“The EU should take a relatively conciliatory stance”) was found to be acceptable to approximately 35 to 40% of the populations of these countries.

Attitude expected of the EU in its negotiations with the UK

Question: In its negotiations with the UK, do you personally want the EU to ...?

The Poles, - who joined the EU more recently and who have strong ties with the UK (as explained above) - are less demanding and more lenient with an absolute majority (52%) in favour of a relatively conciliatory stance.

In various countries, especially among the founding countries, certain categories of the population stand out in that they advocate a firm attitude in dealing with the British. This is notably the case of senior citizens. The findings reveal that - in France and Germany, for instance, but also in Italy and Belgium – the expectation of intransigence in negotiations with the UK increases with age. One might consider that the older the respondents, the more inclined they are to remember that the British have always stood apart, have regularly sought exemptions or adjustments, and have blocked



progress with the building of Europe on several occasions. As a result, these seniors are more intransigent than the younger generations with regard to an ex-partner that has always been fickle and difficult to deal with.

Senior citizens lead the pack in advocating that the EU should not make any concessions to the British and should quickly withdraw all economic and trading benefits from them

Interestingly, this intransigence on the part of senior citizens in the different countries seems to echo the fact that, in the UK, it was the seniors who were most supportive of Brexit, as evidenced by various polls. For instance, according to the study published by Lord Ashcroft Polls, the Leave vote was highest among the 65+ age group (60%), followed by the 45-64 age group with 57%, and gradually falling thereafter to 48% in the 35-44 group, 38% in the 25-34 group, and only 27% of 18-24 year olds.

This crisis illustrated, and then spectacularly ended, the deep divide among baby-boomers over the building of Europe. Unlike their children and grandchildren, Britain's seniors – who were 20+ years of age when the United Kingdom joined the European Community in 1973 – have never really felt European at heart and have never wanted to be fully integrated. By turning out in such large numbers to vote on June 23, and by voting as predominantly as they did for the Leave campaign, they have brought the curtains down on this episode. Their continental counterparts, who had up until then put up with their Britain's demands, now seem unwilling to make any new concessions.

Though the continent's senior citizens constitute the most intransigent age group, we find, in a similar vein, that is in the historically most pro-European political families (who are therefore the most incensed about the attitude of the British in the past and in the present) that the expectation of firmness is expressed most intensely. In France, for instance, this is the position of 72% of UDI supporters and 71% of Modem supporters, compared with 55% of the overall population and only 43% within FN (whose sovereigntist leanings accommodate greater leniency with Leavers). In Germany, the pro-European CDU/CSU (67%), centrist party FDP (65%) and SPD (61%) voters also expect an intransigent attitude on the part of EU leaders. The same phenomenon can be found in Italy where Partito Democratico voters scored 59% by comparison with a national average of 47%.

In certain countries (e.g. France and Germany), this intransigence expected in negotiations is not specific to pro-Europeans who are exasperated by the attitude of the British. This intransigence is also prevalent among those who see Brexit as an opportunity for their domestic economy. If we pursue this train of thought, negotiations without concessions would lead to a further weakening of the UK economy which, in turn, would enable the continental economies to gain market share. In Germany, 61% of respondents who forecast a weakening of the UK's economy are in favour of tough negotiations, versus 43% who believe the UK economy will be invigorated by Brexit. Similar reasoning can be found on the French side where 64% take the former position (weaker UK economy) while 39% take the latter (invigorated UK economy).

Reviving integration around the founding countries ...

As mentioned previously, public opinion in Europe is quite cautious about the consequences of Brexit for Europe, with sometimes sizeable portions of the populations forecasting one or other of two opposite scenarios, namely a new momentum for the EU based on stronger foundations, and a series of referendums followed by exits from the EU. That said, if we leave prognosis aside to examine people's wishes, the outcome is much clearer. In all countries, the vast majority is strongly in favour of the core group of founding countries rapidly taking initiatives to create a politically and



economically more integrated Europe around the eurozone. The scores are particularly high, especially in the founding countries, with 83% in France, 82% in Italy and Belgium and 79% in Germany. Countries that joined more recently such as Poland (70%) or Spain (68%) also returned high scores, and they too expect fresh momentum to come from the founding members.

Approval of accelerated European construction led by the founding countries

Question: Do you fully agree, mainly agree, mainly disagree or completely disagree with the following opinion: *“With 27 member countries, it has become difficult for Europe to advance. The core group of founding countries (i.e. France, Germany, Italy, Belgium, the Netherlands and Luxemburg) must therefore move quickly and take initiatives to create a politically and economically more integrated Europe around the eurozone?”*

As shown on the chart above, the wish for a deepening of European construction in reaction to Brexit is certainly the wish of the majority, but the intensity of this wish varies quite substantially from one individual to another and the findings reveal that those who replied “fully agree” – i.e. the most convinced partisans of reinforced integration – were actually in the minority (38% of the French, 30% of the Belgians and 29% of the Italians, for example). The higher up we climb the age pyramid, the more intensely respondents wanted integration. However, the decline is linear among the younger generations. It is therefore the older generations, who directly experienced the different stages in the building of Europe, who most ardently want to turn a new page in Europe’s construction, while the younger generations are the least emphatic.

The intensity of the wish for reinforced integration of the eurozone increases linearly with age

In this context of a vast majority of Europe’s populations concurring in their wish for the founding countries to take the initiative, the various developments in European construction that were tested in this poll are scored high levels of approval. On average, nearly six Europeans out of ten would be in favour of creating the position of European Minister of Finance and the Economy, and an even higher proportion said they would agree to the EU President being elected by direct universal suffrage. The creation of a European army was advocated by approximately six out of ten people polled, except in Germany (47%) and Spain (45%) for historical reasons.

However, these high scores must be put into perspective. Firstly, the findings reveal a substantial gap – even bigger than on the issue of accelerating European integration – between the “total percentage in favour” and those who are “completely in favour”. In most countries and on all three projects tested, the proportion of those “completely in favour” does not exceed the 25% mark, mainly ranging between 15 and 20%. This shows that, while the prevailing disposition is quite favourable, motivated partiality for these paths towards accelerated integration was clearly the position of a minority. Given the tense financial environment, the proportion of Germans in favour of a European Minister of Finance and the Economy was down 6 points (64% in January 2014 versus 58% currently). This trend is even more marked among Italian voters, thereby confirming the rise of Euroscepticism in Italy: concerning the election of an EU President by direct universal suffrage, the approval rate is down from 79% to 67% (-12 points), whereas the proportion in favour of creating a position of European Minister of Finance and the Economy has fallen from 80% to 65% (-15 points). The downturn is much less spectacular as regards the creation of a European army, down 3 points to 59% in favour, which might be attributable to the migrant crisis and the jihadist threat in Libya. In the eyes of Italians, these perils and threats make a very strong case in favour reinforced military cooperation.



It should be noted that in Belgium there is a clear divide between the Flemish and the Walloons on the acceleration of EU construction and on whether or not it would be a good thing to hold a referendum. As shown in the chart below, there is quite a striking convergence of opinions between the Walloons and the French on these issues.

The findings of this survey reveal that one of the consequences of Brexit was to drive up demand for greater integration. However, this demand is still relatively vague and the intensity of motivated support for certain pathways tested (e.g. creation of a European Minister of Finance and the Economy or the idea of a European army) is not very high.

This new phase in the integration process could also prove difficult to implement as none of the players seems to have sufficient legitimacy to federate all points of view. While the Presidents of the European institutions (Luxemburg's Jean-Claude Juncker, Poland's Donald Tusk and Germany's Martin Schulz) have the support of the majority in the northern European countries with levels of confidence at 63% in Poland, 57% in Germany and 51% in Belgium, the situation is very different in the southern half of Europe (none of the above-mentioned Presidents is a native of a southern European country, which might go some way to explaining this) where levels of support are only 39% in Spain, 41% in Italy (both these countries have had to implement structural adjustment policies at the behest of Brussels in recent years) and 43% in France.

Worse still, with the exception of Germany, in all the countries polled, confidence in national political leaders to propose a new vision of European construction and impart fresh momentum was clearly a minority view, and that confidence was particularly low in the Latin countries (23% in Italy, 24% in Spain and 29% in France). This distrust of one's national leaders is such that people's confidence in them was lower than confidence in the political leaders of other EU countries ... As can be seen in the bar chart below, that gap is as high as 11 points in Italy and 9 points in France. On the other side of the Rhine, the situation is quite the opposite, with 62% of Germans expressing confidence in their national political leaders versus 46% declaring confidence in other European leaders.

Confidence in domestic and foreign political leaders to revive European construction

Though Angela Merkel, François Hollande and Matteo Renzi were very quick to meet up the day after the Brexit vote in order to display unity and establish a triumvirate capable of taking European construction forward, there is a large imbalance between their respective levels of legitimacy. The German Chancellor is not only rated very highly in her own country but undoubtedly also in other countries to a certain extent since, given her renown, there is reason to believe that it was her that respondents had in mind when they expressed their confidence in the "political leaders of other EU countries". On the other hand, her two partners are in a difficult position in their home countries where they have confidence ratings of less than 30%, i.e. less than half Angela Merkel's rating in Germany. As shown in the table below, partly due to the broad-based coalition in power in Germany, Chancellor Merkel's rating is shored up not only by her own party's supporters but also by those of the SPD. In France and in Italy, the divide between left and right is clearly reflected in the result. In both countries there is a division, and neither leader appears to have sufficient legitimacy to champion a new European project.



Confidence in the leaders of one's own country to relaunch European construction

Country	Overall Supporters of		Supporters of
	population	the majority	the opposition
Germany	62%	83%	80%
France	29%	66%	26%
Spain	24%	56%	14%
Italy	23%	56%	21%

... and a halt to the enlargement process

Brexit and the instability that ensued in the UK resulted, on the one hand, in many Europeans seeing greater benefits in EU membership, and, on the other hand, in demand for greater integration, but the victory of the Leave campaigners had another quite different consequence. During the post-Brexit period of soul-searching to appraise decades of European construction, another conclusion became very clear. In most countries, the need to bring the integration process to a halt was clearly voiced. It was as though the response to the UK crisis should not be further enlargement of the European Union (which had no shortage of members whence it inability to function properly) but rather a more in-depth integration possibly within a narrower scope.

This halting of the enlargement process has had a twofold effect. In the case of Turkey, whose wish to join the EU has been discussed for years, the acceptance rating dropped, sometimes dramatically. As shown in the next two charts, the downward trend may not be new, especially in France, but it has continued and now stands at very low levels of acceptance (13% in France, 12% in Germany).

Variations in acceptance of Turkey joining the EU

There are reasons to believe that, following the crisis triggered by the Brexit vote, the priority given to the consolidation of Europe rather than to enlargement is not the only factor to have increased reluctance to let Turkey join the EU. The deterioration of the political situation and heightened security issues with the shift of the Erdogan regime towards an authoritarian stance, the resumption of fighting with Kurdish guerrillas and the increasing number of Daesh attacks on Turkish soil are undoubtedly all factors that play an equally important part.

In addition to the dip in willingness to let Turkey join the EU, the second major obstacle to enlargement is the fact that quite substantial majorities are refusing to admit countries that recently became candidates. Ukraine is one such case in point. Only 27% of French, 29% of Belgians, and 30% of Germans feel favourably about this scenario. Contrary to the saying that the last to get in are the most intransigent of gatekeepers, public opinion in the countries that joined the EU most recently tends to be more open-minded. For instance, 49% of Spaniards and 55% of Poles would be in favour. It should be mentioned that in France and Germany, countries for which we have earlier data, the willingness to let Ukraine join has declined just as it has in respect of Turkey. Compared with March 2014, willingness to let Ukraine join fell from 38% to 30% in Germany and from 29% to 27% in France.

Willingness to accept the Balkan countries in the EU (e.g. Serbia, Macedonia or Montenegro) – the very principle of which was reasserted by the French and German heads of state at a summit on the western Balkans last July 4 in Paris – is currently at levels very close to those measured in respect of Ukraine. Here again, there is a deep divide between the founding countries who are very opposed to the idea (only 23% in favour in France, 30% in Germany, and 32% in Belgium) whereas Spain (51%)



and especially Poland (58%) are much better disposed. It might be worth mentioning that though Ukraine is geographically very close to Poland, this does not work in its favour since the number of Poles who feel favourably about Balkan countries joining the EU (58%) is higher than the proportion in favour of its neighbour Ukraine being accepted (55%). The idea of Ukraine joining, given the tensions with Russia, clearly causes greater reluctance, not to say concern, in Poland.

One further sign that the emphasis is currently on reinforcing integration under the leadership of the core group of founding countries rather than focusing on enlargement is the fact that, in most of these countries, only a minority of public opinion would be willing to let the Balkan states join the EU and this includes even the most pro-European political families. This willingness is only 20% and 26% among UDI and Modem supporters in France, the score is also only 23% among FDP, 30% among CDU/CSU and 40% among SPD sympathisers in Germany, but 47% among Partito Democratico voters in Italy.

It should also be stressed that opposition to Turkey joining the EU is increasing and already very substantial in all the countries polled. This is a very important lesson and a potentially problematic issue. In the aftermath of the Brexit vote, numerous observers and leaders have pointed out that the pro-Europe position had been penalised because, for all too long, it had been built up without taking the populations into account. It so happens that, with the example of Turkey, we have an extreme case of failure to take into account the will of the people. In conjunction notably with negotiations concerning the migrants and refugees, whole new chapters have been opened up on EU membership and the lengthy process of integrating Turkey seems to be advancing year after year, slowly but surely, just as public opinion in Europe has become increasingly hostile to this prospect. This variance between the will of the people and diplomatic decisions taken by Europe's leaders on this particularly sensitive issue may still develop into yet another democratic U-turn of the part of the EU.

This rejection of Turkey is also reflected in the fact that, in all the founding countries, very large majorities are also opposed to Turkey being part of any economic trade alliance with Europe. In fact, 58% of the French and Germans and 56% of Italians are against any such arrangement. Yet again, the Spanish (59% for) and the Poles (56%) are more open-minded about this idea.

However, public opinion would be much more amenable to the granting of special trading partner status to states with a European culture such as Ukraine, Serbia, Macedonia or Montenegro.

Acceptance of Ukraine and the Balkan states joining an economic trade alliance

These large majorities in favour of granting this type of special status to the above-mentioned countries are a good illustration of two points: firstly, the fact that Europeans want to bring the enlargement process to a halt (by granting these accession countries special trading partner status without bestowing full EU membership on them) and, secondly, the notion of a Europe organised in concentric circles is gaining ground. The figures quoted above were evidence of strong approval for the establishment of a politically and commercially more integrated space based on the eurozone. On the periphery of this core Europe there would be a second circle comprised of member states that have not adopted the euro, surrounded by a third circle comprising peripheral countries such as Ukraine or the Balkan states, who would not be EU members but would have special trading relations with the EU.

While, for a majority of respondents, these countries with close geographic and cultural ties would be fully entitled to a place in this third circle, what about Turkey and ... what about the UK? We have seen that, in a large number of the countries polled, the majority insisted that a firm stance should be taken with the UK, to whom any special status should be denied, which would exclude it de facto from the inner circle (integrated eurozone) but also from the second circle. For many, the UK's new



place would therefore be in the third circle or even at the periphery since, as would have it 55% of Germans, 53% of the French and 51 of the Spaniards, “the EU should not make any concessions to the British and should quickly withdraw all economic and trading benefits associated with EU membership”. The new situation brought about by the victory of the Leave camp leaves us in a quirky situation where Europeans now place the UK in a position quite close to Turkey at the periphery of that third circle comprised of non-member countries with special trading partner status.

Acceptance of Turkey and the UK as special trading partners of the EU

As shown on the bar chart below, in the four founding countries polled (France, Germany, Italy and Belgium), only a minority would be in favour of Turkey joining a special trading zone, and the scores are only slightly better in the case of the UK. Once again, Spain and especially Poland, the most recent newcomers to the European Union, are the most amenable of all.