

EUROPEAN TECH INSIGHTS 2021

Part I
How the Pandemic
Altered our Relationship
with Technology

INTRODUCTION

The Covid-19 pandemic has sped up our migration from the physical to the digital domain. With social distancing, our jobs and social interactions have increasingly played out online. This process, which was already in motion before the pandemic, has been turbo-charged as remote work has become the norm for millions of European professionals. At the same time, the digital domain has also been under-regulated, with governments taking a *laissez-faire* approach in terms of the rights and responsibilities of the largest technology companies. This seems to be coming to an end, as governments are increasingly signaling willingness to regulate this space to address privacy, competition or public debate issues.

To tackle the great technological transformation of our time, public and private actors need to understand what is legitimate in the eyes of the citizens and what sort of technological future they may be ready to embrace. Failing to do so could result in resistance to technological change and even greater political polarization. Our annual survey, European Tech Insights, investigates attitudes towards technological change with the aim of understanding how technology is transforming our lives and how it should be governed. It seeks to shed light on the hopes and concerns of our technological future.

In this edition, we focus on how the pandemic has altered our habits and perceptions with regards to healthcare, work, social networks and the urban space. More than a year after the outbreak of Covid-19, Europeans are still struggling to return to any form of pre-pandemic normality. While the long-lasting effects of the pandemic in our lives are yet to be determined, our report unveils public opinion shifts that reveal the profound impact of this crisis.

The findings of the study suggest a sense of growing public responsibility to address societal issues that have been exposed and exacerbated by the pandemic. At the onset of the pandemic, European solidarity deteriorated with closed borders, a lack of coordination and even the halting of critical supplies to European neighbors. Today, the majority of Europeans still favor deepening European integration with the creation of a European Health Union to avoid such outcomes in the future. Moreover, there is strong support among Europeans (61%) for raising the salaries of essential workers, who have been ensuring the functioning of our societies throughout the pandemic.

The pandemic has threatened many livelihoods and amplified concerns regarding technological transformation and labor markets. Support for limiting automation to prevent “technological unemployment”



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OUR RELATION WITH TECHNOLOGY WILL CONTINUE TO EVOLVE AND SO WILL THE WAYS WE DEVELOP AND REGULATE IT.



has been increasing during the last year, and a majority of Europeans are now in favor of limiting automation by law, with only 34% against. This sentiment is stronger among those under 45 years old. Similarly, there is a generational divide between the younger “digital natives” who have fewer privacy concerns and are more willing to share their personal data, and older Europeans who show a lack of trust in emerging technologies.

year ago. Furthermore, a significant proportion of citizens, especially young Europeans, support a ban on petrol and diesel cars. Lastly, Europeans want to be able to move out of cities. Most of them now live in urban areas – increasingly, in high-density cities. The pandemic opened the door to telework, and today more than two-thirds of citizens support fiscal measures to help people and businesses move to smaller cities and rural areas.

Like technology adoption, the use of social networks also increased during the pandemic. What is more, there was an explosion in digital disinformation, an “infodemic” that persists today. There is an overwhelming belief in the overwhelming belief among Europeans (59% vs. 19%) and Americans (52% vs. 22%) that social networks have increased political division. Nonetheless, Europeans are weary of governments and believe social media companies should be the ones moderating content: only (27%) would prefer the government to do so.

As vaccine rollout progresses and Europeans start seeing the light at the end of the tunnel, this years’ edition offers a glimpse into the impact of the pandemic on public opinion, from demands for enhanced European healthcare cooperation to increased awareness of the downsides of technological development. Our relation with technology will continue to evolve and so will the ways we develop it and regulate it. It is why European Tech Insights endeavors to undertake the critical task of providing decision makers with insights into how citizens perceive and adapt to the transformations of our time.

The pandemic also had a large impact on Europeans’ relationship with the city. Restrictions in mobility and the large shift to remote working changed citizens’ expectations of urban spaces. There is now strong support among Europeans for greener, quieter cities: a majority (43% vs. 41%) want to reduce the presence of cars in the center of cities, which was not the case a

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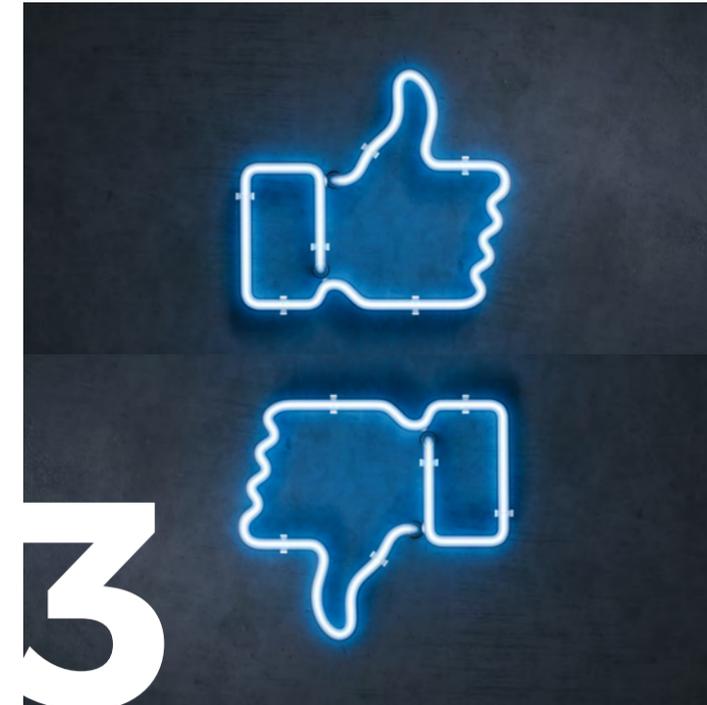
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A healthcare professional, likely a nurse or doctor, is shown in profile, wearing a white surgical cap and a white face mask. They are wearing teal scrubs. The background is a blurred operating room with various pieces of medical equipment. The entire image has a blue color cast. On the left side, there is a white square frame containing a large number '1' and the text 'HEALTHCARE, TECHNOLOGY AND PRIVACY' in white, bold, uppercase letters.

1

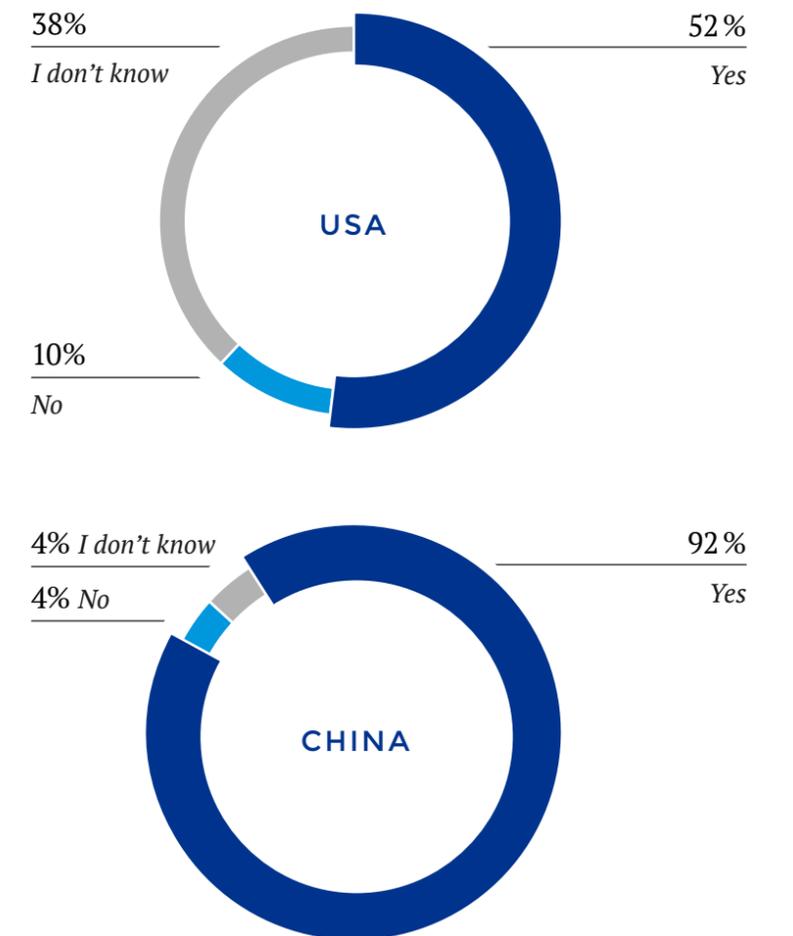
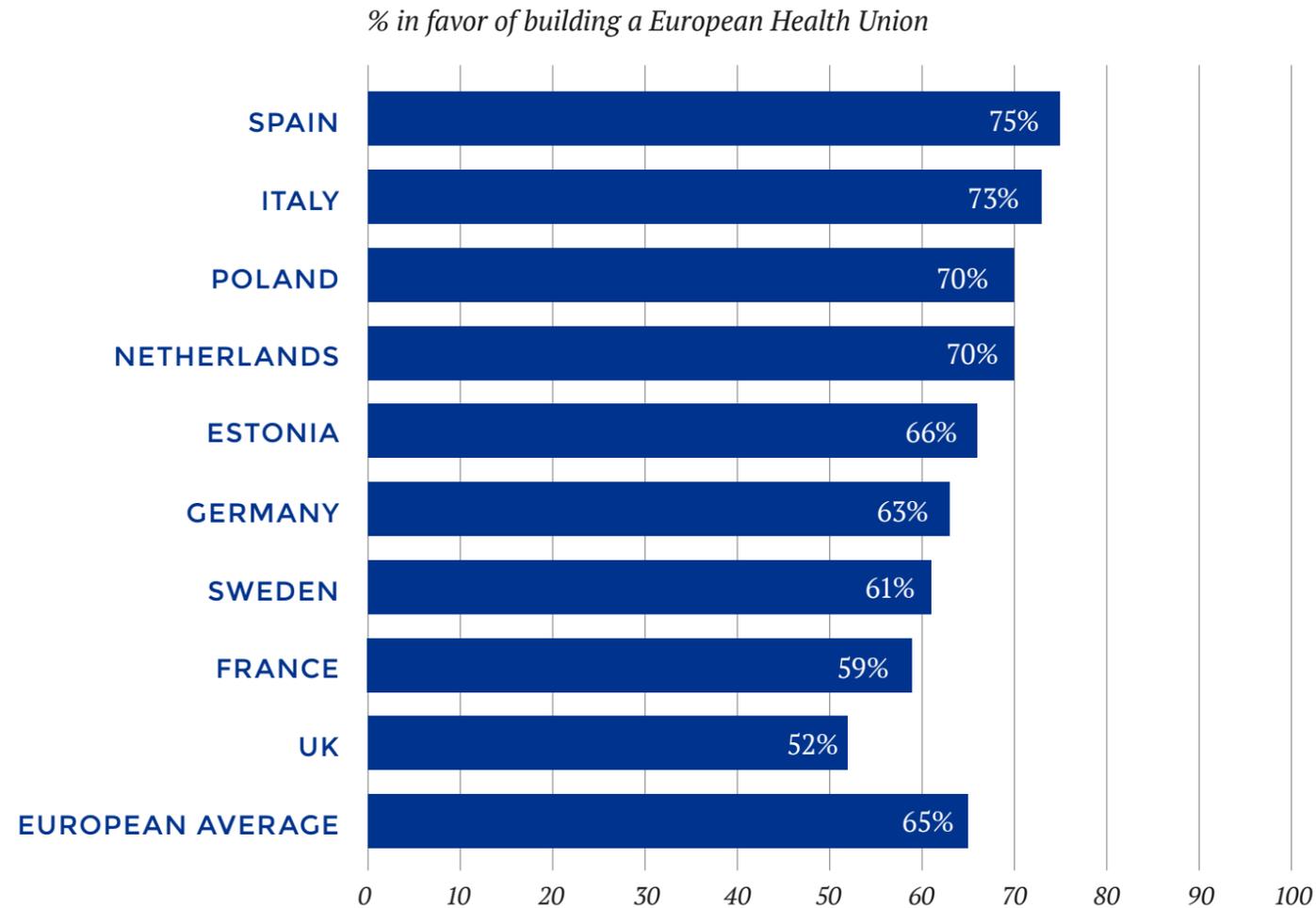
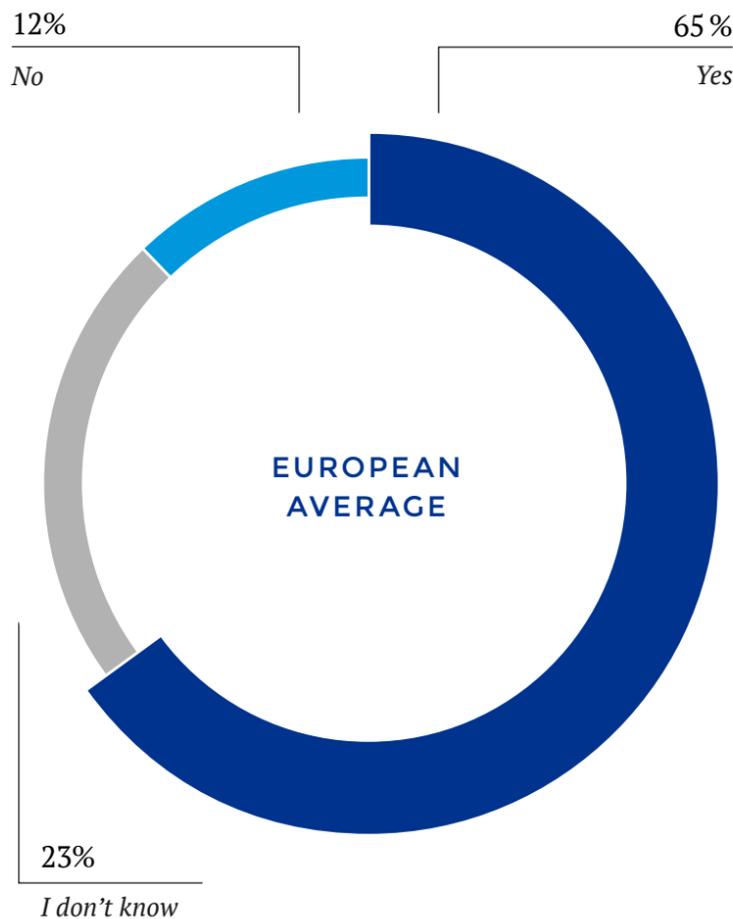
**HEALTHCARE,
TECHNOLOGY AND
PRIVACY**

FINDING 1 – EUROPEAN HEALTH UNION

Over a year after the onset of the pandemic, a **large majority of Europeans (65%) support building a European Health Union** to enhance cooperation in the field of public health. The strongest support is found in Spain (75%), Italy (73%) and the Netherlands (70%), while only 12% of Europeans are against. US and Chinese citizens also believe that Europe needs a stronger collaboration in this area – particularly, Chinese respondents overwhelmingly (92%) think Europe would benefit from such initiative.

QUESTION:

The Covid-19 health crisis revealed a lack in coordination among European countries (e.g. the unilateral closure of borders) and solidarity seemed absent. Some experts have argued that the reason was that Europe has very limited competencies in public health. Do you think Europe should build a European Health Union to enhance cooperation in this field?

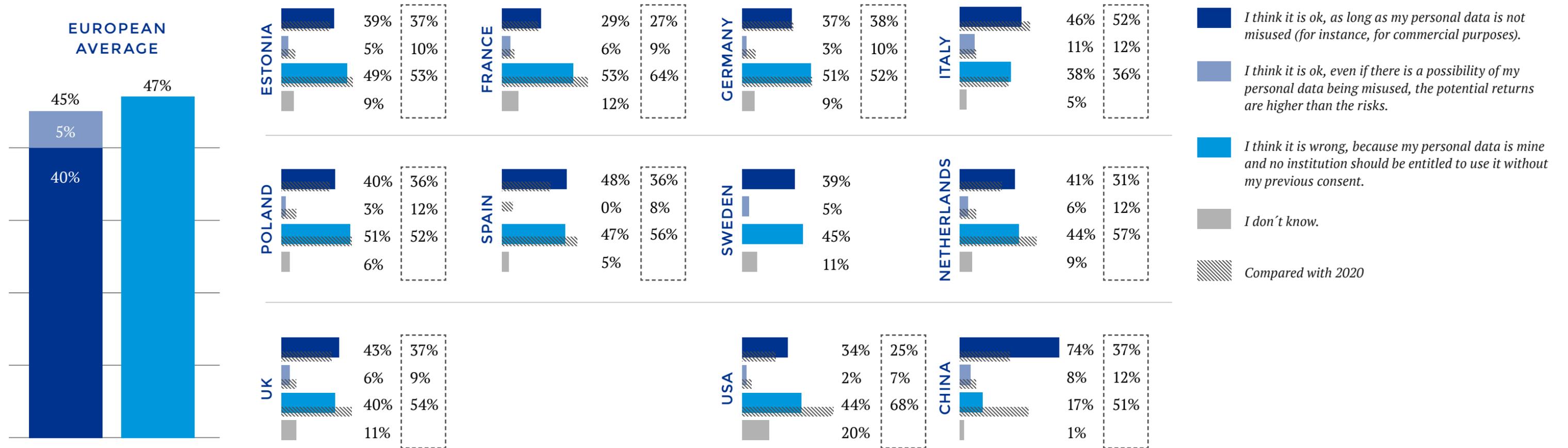


FINDING 2 – PERSONAL HEALTH DATA

Europeans are still divided over letting governments share their health records with private companies (45% for, 47% against), even if this helps developing new treatments. Although during the first wave of the pandemic we saw a momentary decrease in privacy concerns – especially in the hardest-hit countries (61% of Italians and 55% of Spaniards were in favor then) – today **numbers in Europe have gone back to pre-pandemic levels**. A similar evolution is observed in the US, where only 36% of citizens are willing share their health records. By contrast, in China privacy concerns have been steadily plummeting to the point that today only 17% of Chinese are against sharing their records.

QUESTION:

Some governments are sharing their citizens' health records with companies like Google in order to support the development of mechanisms for early detection of diseases and new treatments. How do you feel about this?

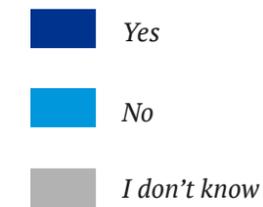
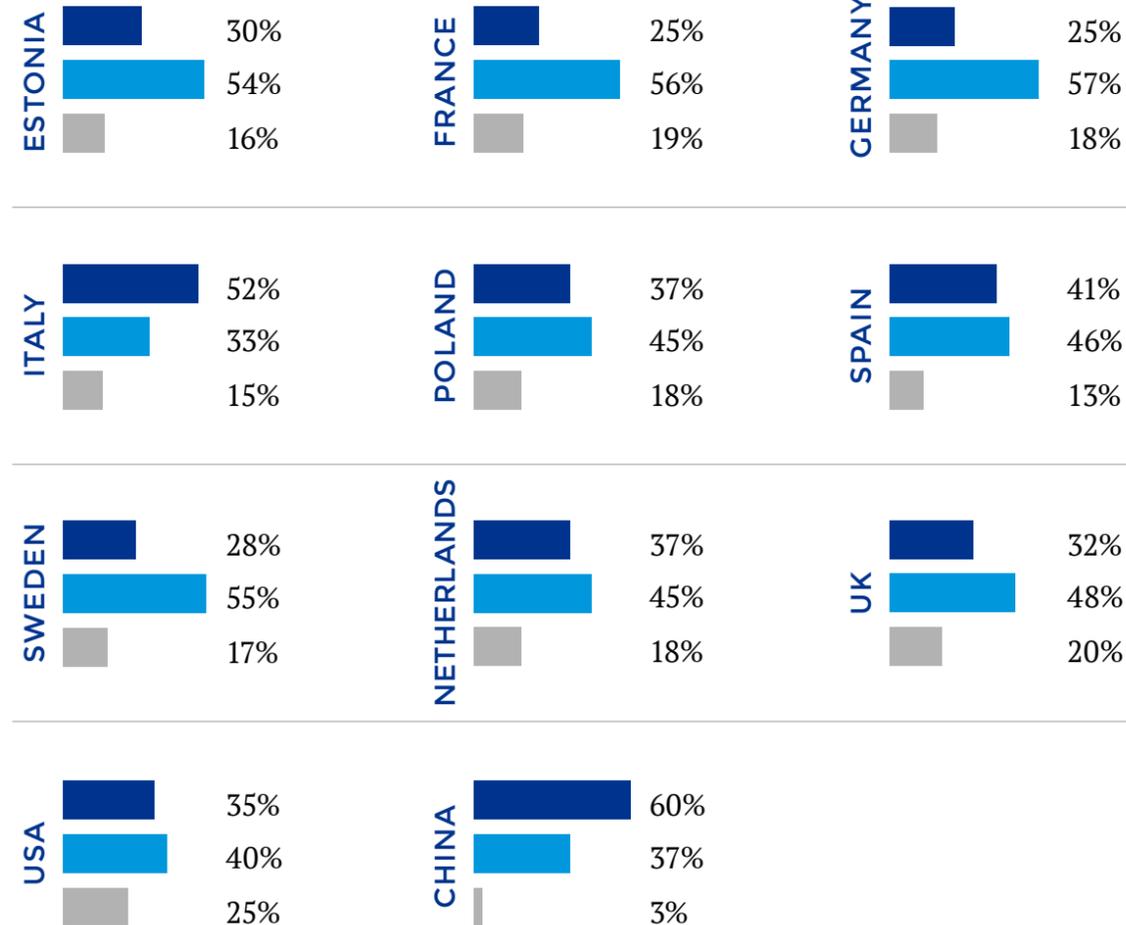
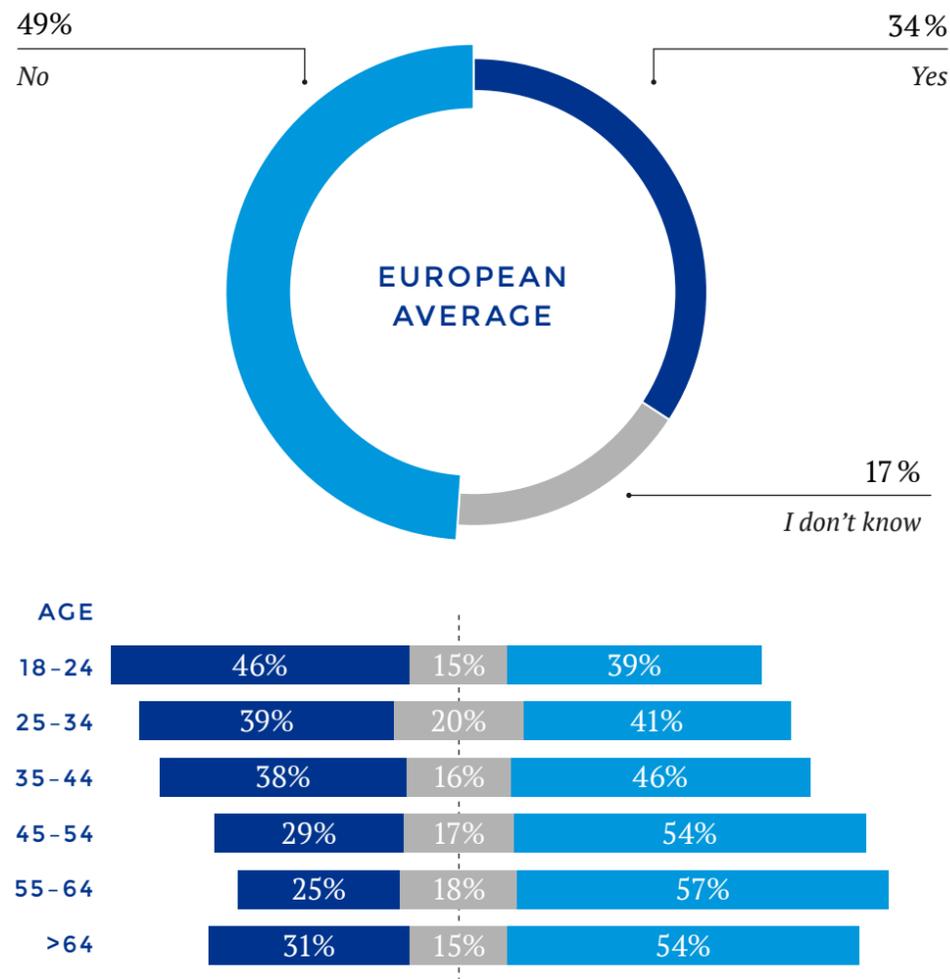


FINDING 3 – HEALTH WEARABLES

A majority (46%) of young Europeans under the age of 25 are willing to let their insurers collect personal health and exercise data through the use of health wearables. Younger cohorts show less privacy concerns and are more willing to share health data, while a majority of those over 35 are against. In aggregate, a third of Europeans (34%) are willing to let their insurers collect personal health and exercise data with the strongest support in Italy (52%), Spain (41%) the Netherlands and Poland (37%). This view is also dominant in China, where 60% of respondents are willing to share their personal data.

QUESTION:

Health wearables, such as fitness wristbands, are designed to collect personal health and exercise data. Would you be willing to let your insurer record your physical activity and calorie intake with a wearable in exchange for discounts for healthy behaviour?



2

**THE CHANGING
NATURE OF WORK**

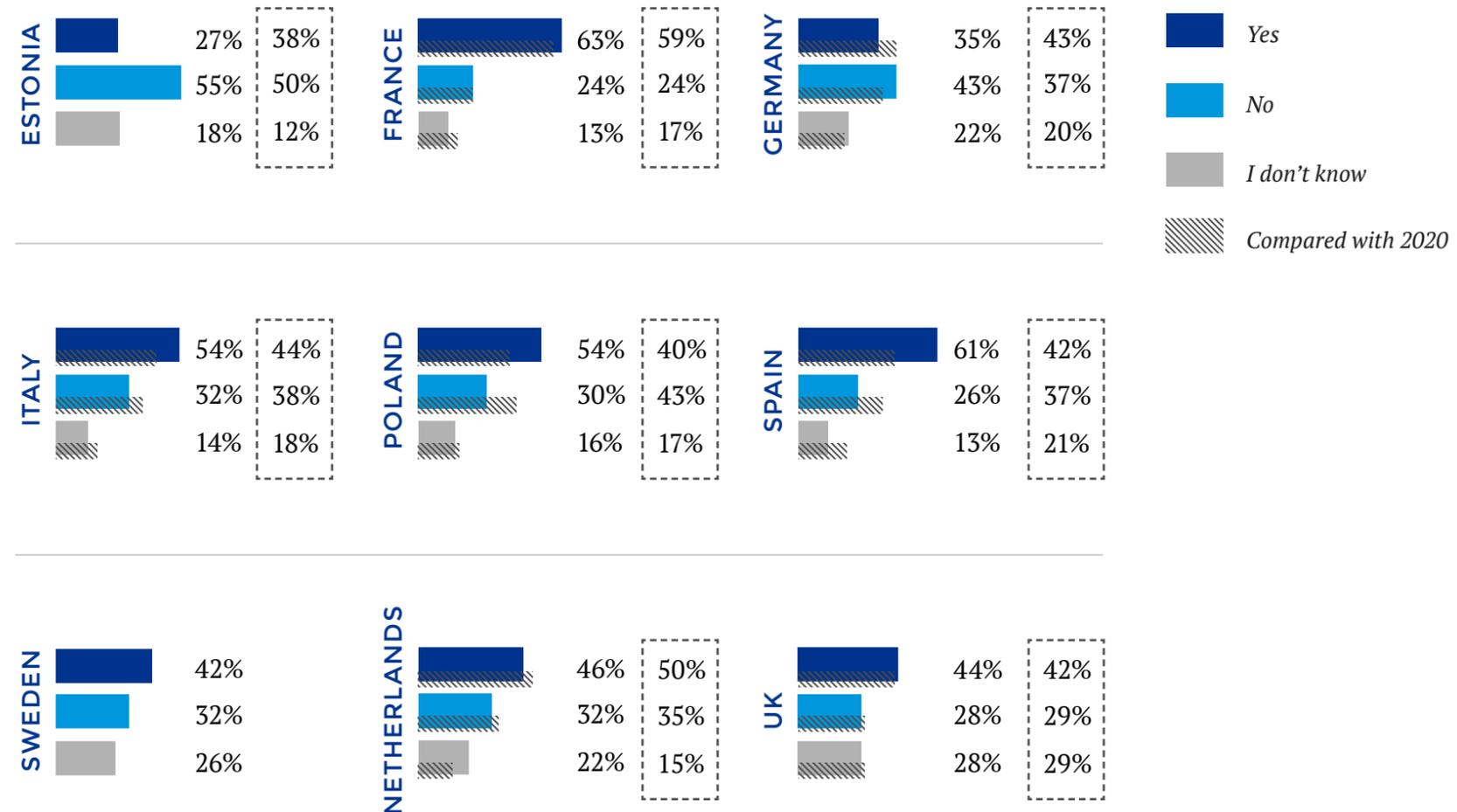
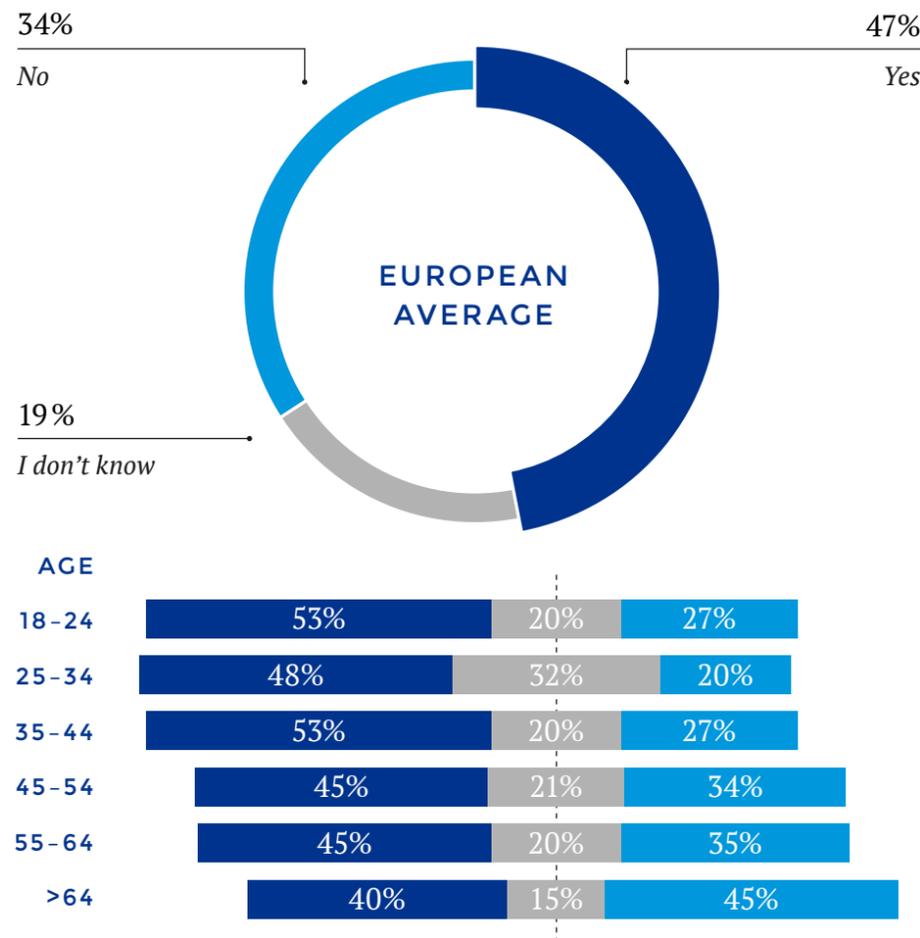


FINDING 4 – AUTOMATION AND JOBS

Europeans want to limit automation by law to safeguard jobs. The number of Europeans who support measures to limit automation has grown during the last year and now represents a majority (47% in 2021 vs 44% in 2020). In fact, all European countries surveyed are in favor of such limits except Germany and Estonia. Support has particularly grown in Spain (+19 points), Poland (+14 points), and Italy (+10 points). Moreover, there is an intergenerational gap: support for limits is strongest among those under 44, whilst those over 45 are more skeptical to the ban.

QUESTION:

Should European governments limit automation by law in order to save jobs and prevent technological unemployment?

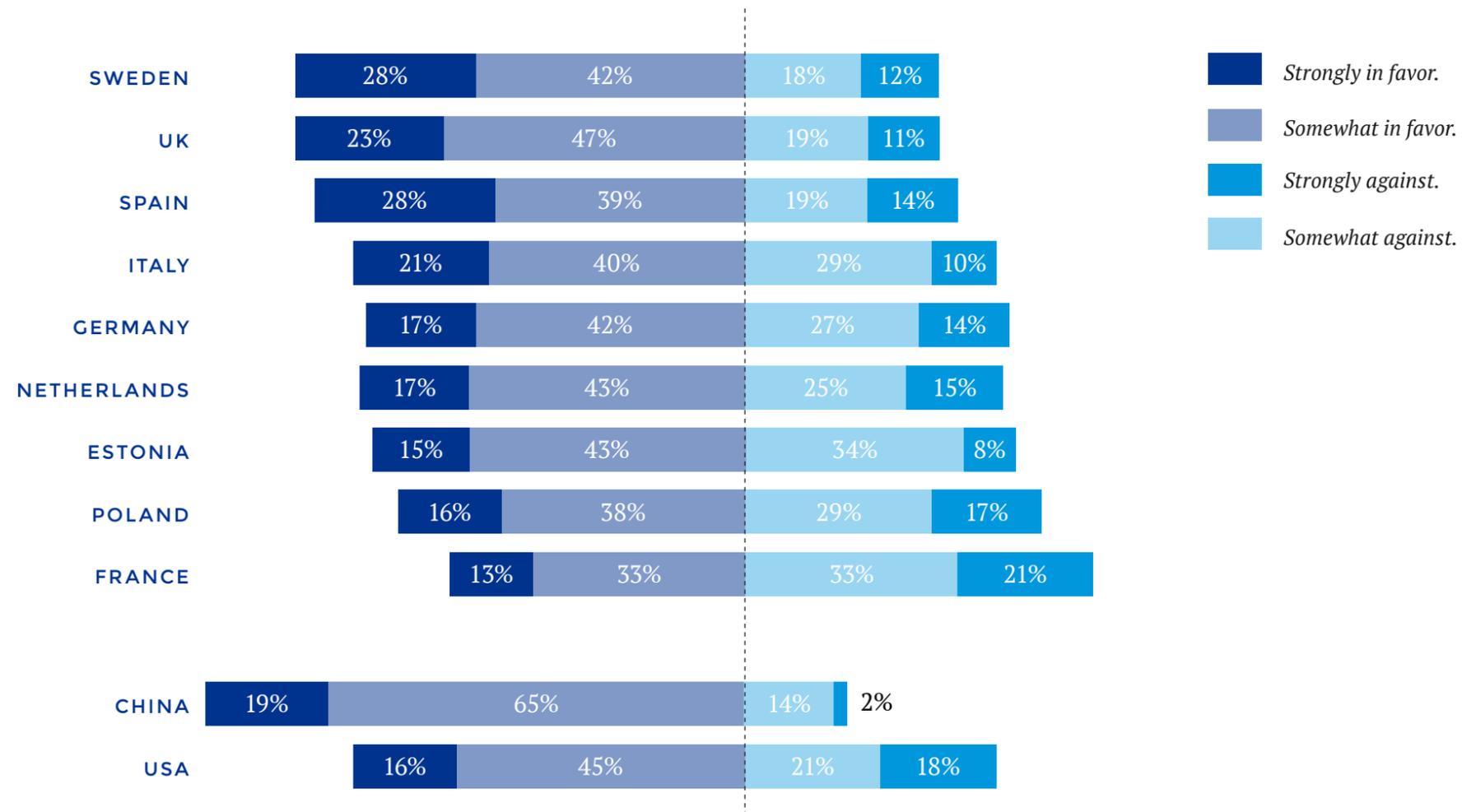
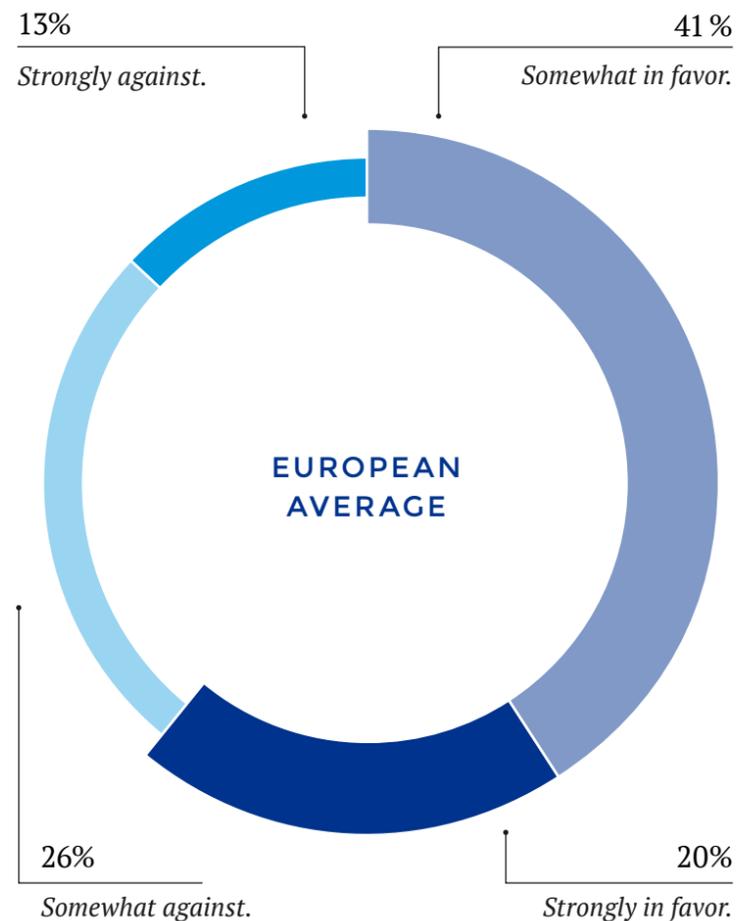


FINDING 5 – ESSENTIAL WORKERS

A majority of Europeans (61%) are willing to pay more taxes in exchange of raising the salaries of essential workers. Support is identical among all cohorts. The only country that is against the measure is France, with 54% of its citizens against. Highest support is found in Sweden (70%), UK (70%) and Spain (67%). It is worth noting that Chinese respondents overwhelmingly support the measure: 84% are willing to pay more taxes to help essential workers.

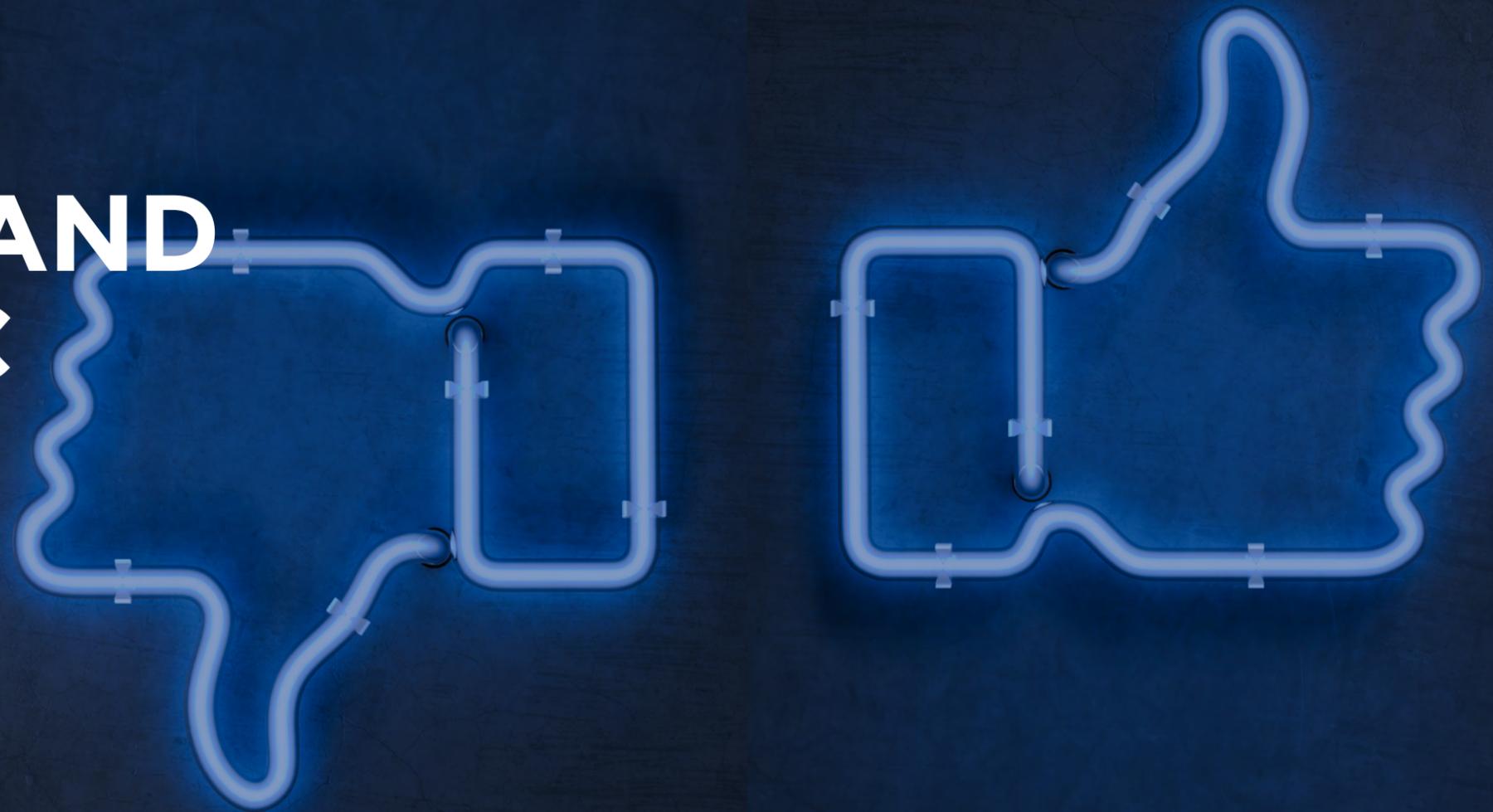
QUESTION:

A number of low-paid, often low-skilled jobs have been revealed as essential during the pandemic: custodial staff in hospitals, child-care workers, grocery clerks, delivery people, etc. Would you be willing to pay more taxes in order to raise their salaries?



3

SOCIAL MEDIA AND THE INFODEMIC

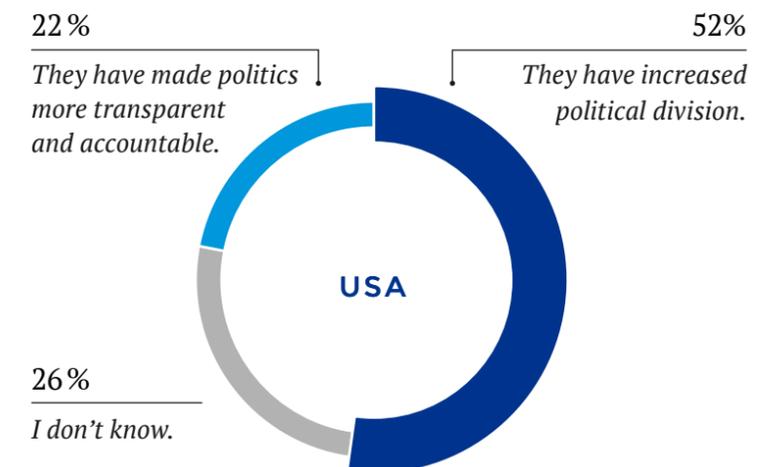
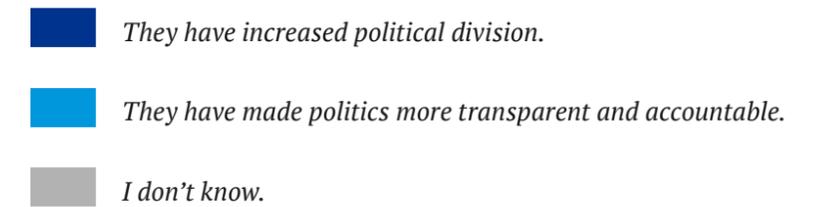
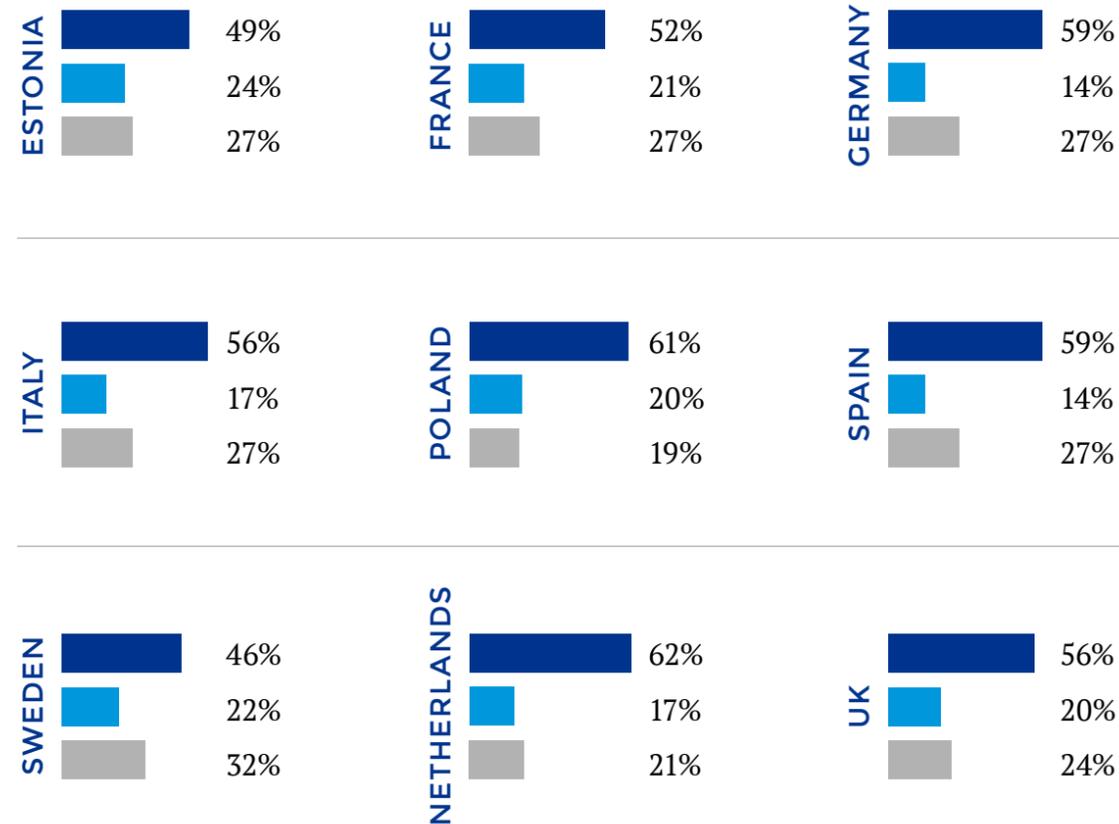
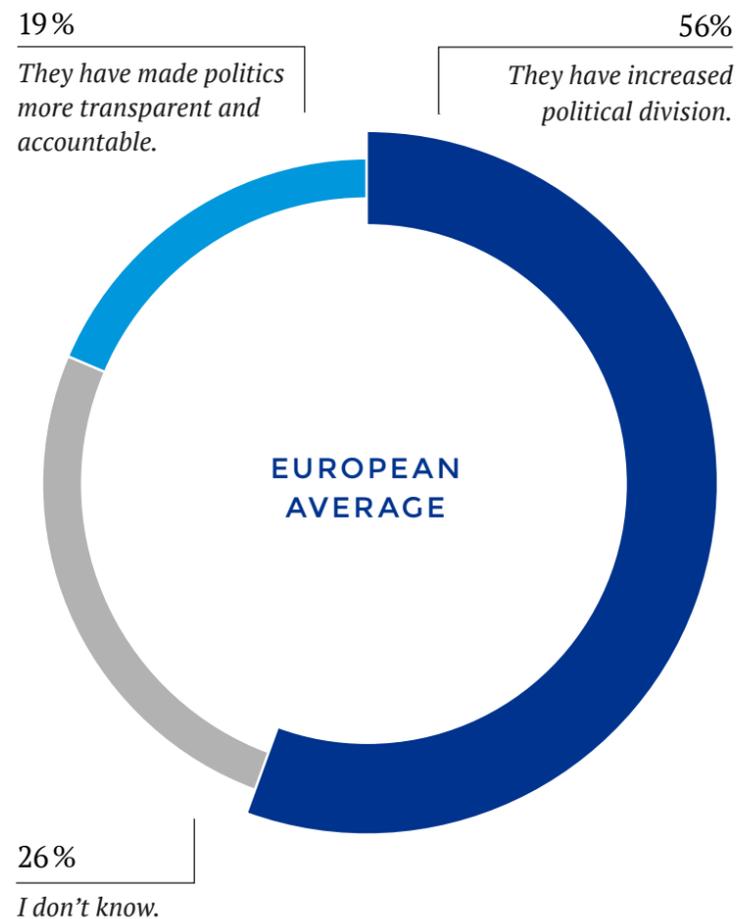


FINDING 6 – SOCIAL MEDIA AND POLARIZATION

There is a wide consensus among Europeans that social networks have had a negative impact and increased political polarization. A large majority (56%) of European respondents believe social networks have increased political division and only 19% think they have made politics more transparent and accountable. This view is also dominant in the United States, where 52% of respondents believe social media platforms have had a negative impact on political division.

QUESTION:

In your opinion, have social networks like Facebook and Twitter made politics more transparent and accountable, or have they increased political division?



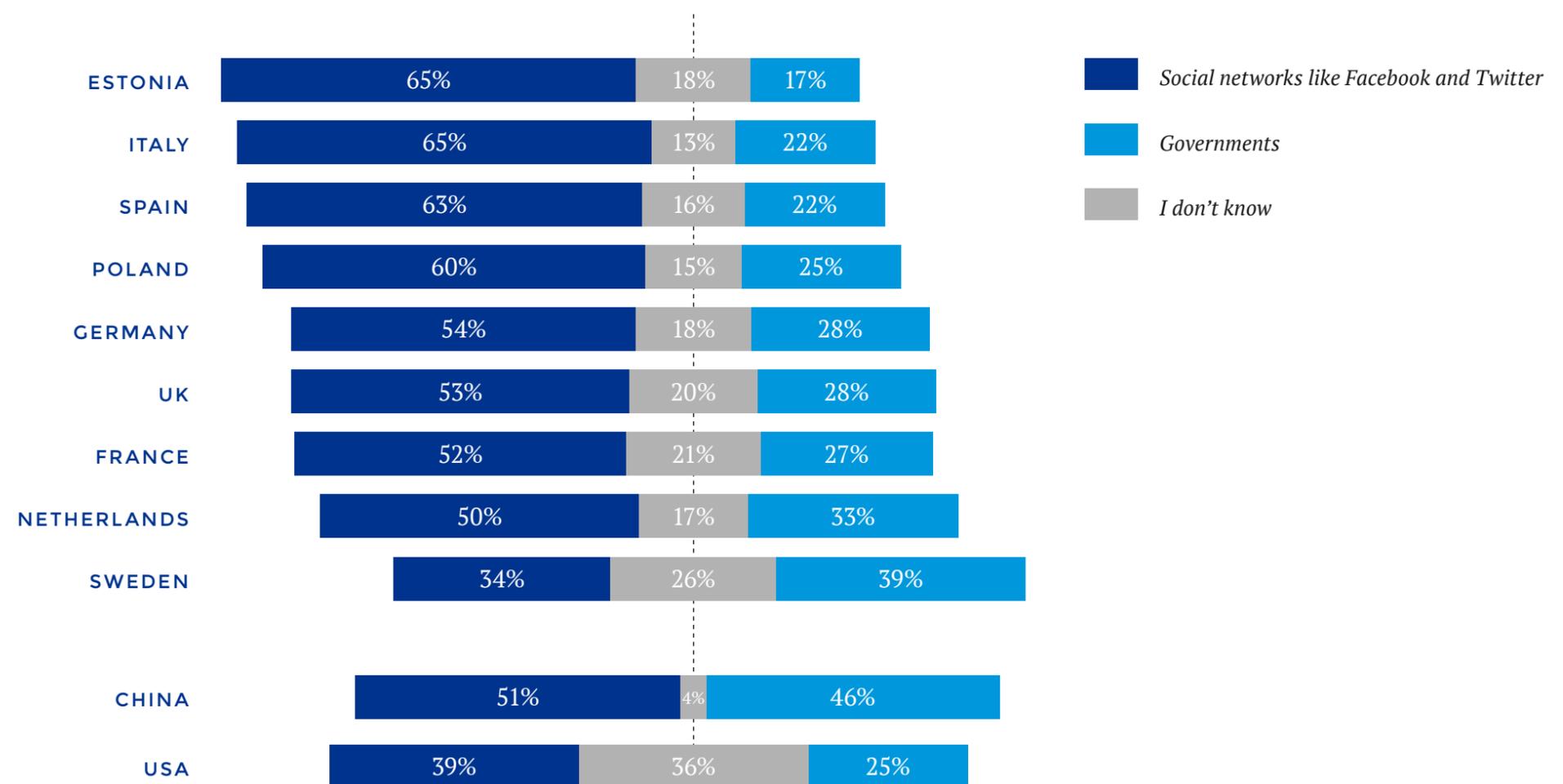
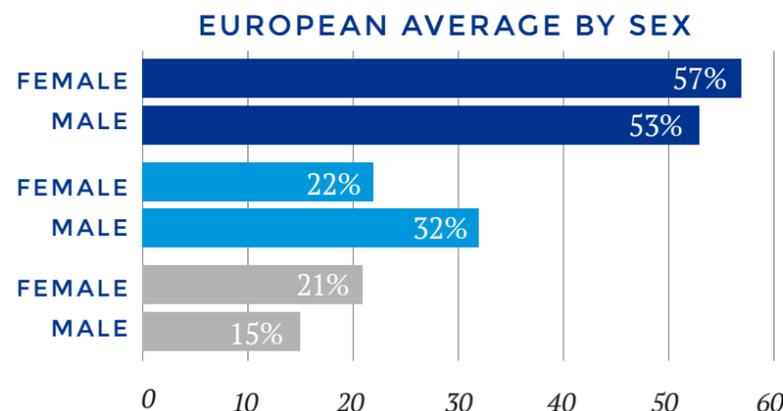
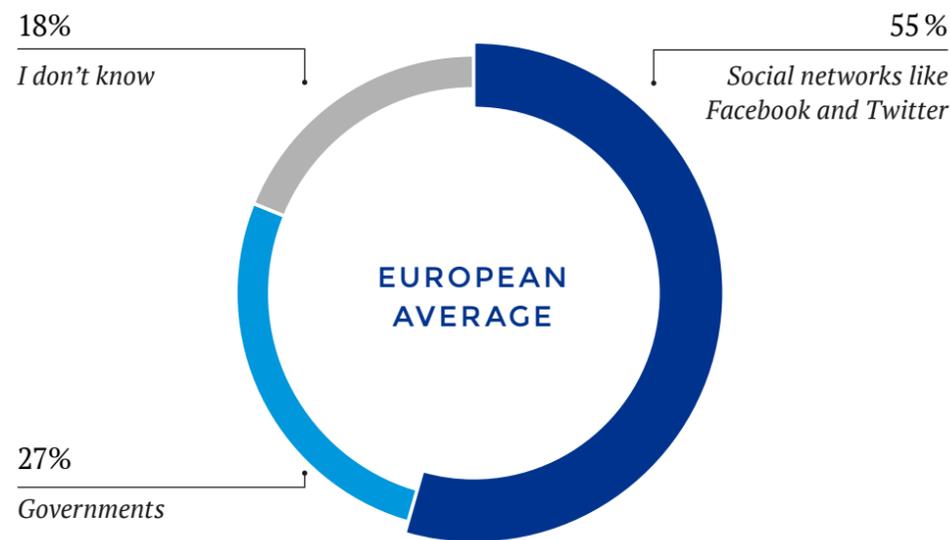
FINDING 7 – SOCIAL MEDIA MODERATION

Despite the controversy surrounding social media platforms and content moderation, Europeans believe that fake news on social networks should be controlled by the platforms and not by governments.

55% of respondents think social networks like Facebook and Twitter should be the ones moderating content, while only 27% think governments should be in charge. Sweden is the only European country where a majority wants governments to control the spread of disinformation (39% vs 34%). There is a stronger support among European males than females for governmental control of fake news (10 point difference).

QUESTION:

During these last months, we have seen a surge in fake news on social media exploiting uncertainty around the coronavirus pandemic. Who do you think should be in charge of controlling the spread of fake news on social media?





4

THE TRANSFORMATION
OF THE URBAN SPACE

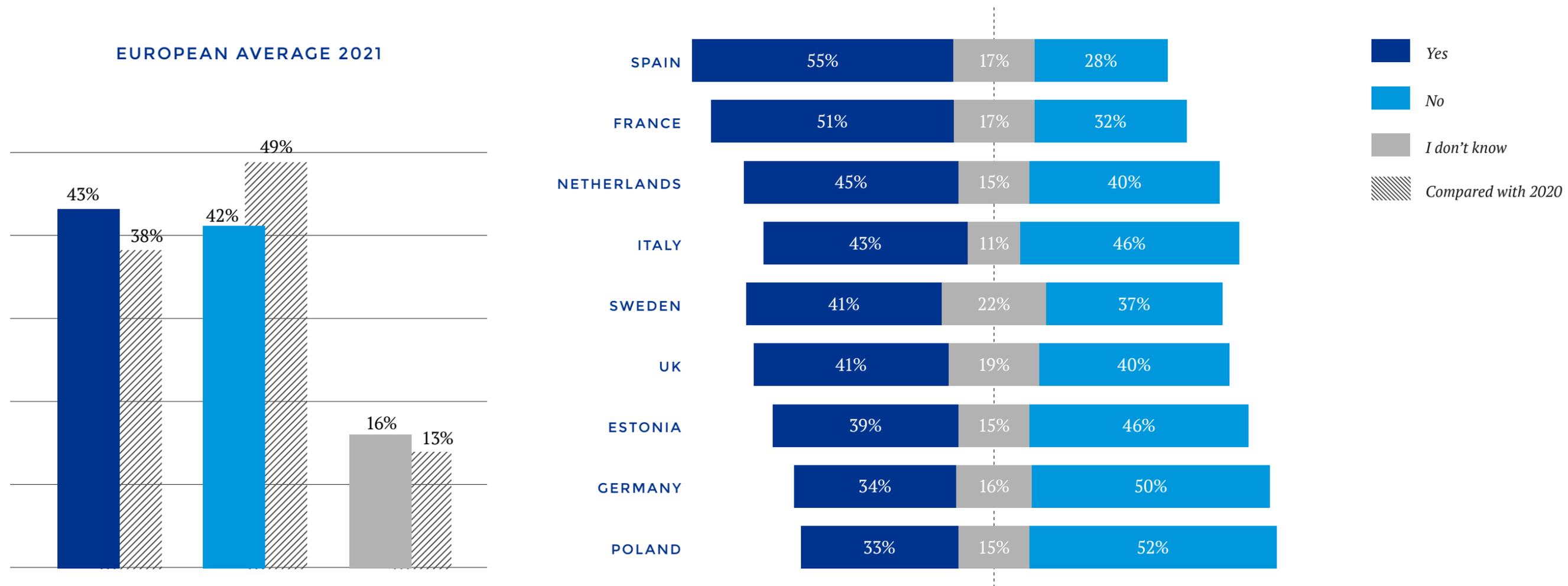
FINDING 8 – CAR USE IN THE CITY

The pandemic has changed citizens’ priorities and their relationship with the city. Last year, a majority of Europeans (49%) were against reducing the presence of cars in the streets. However, a year after the onset of the pandemic, opposition to such measures has shrunk to 42% and now **Europeans that want to reduce the presence of cars in European streets through taxes or other restrictions represent a majority.**

The two countries with the strongest support for limiting cars are Spain (55% for vs. 28% against) and France (51% for vs. 32% against).

QUESTION:

Are you in favor of reducing the number of cars in the streets through increased taxes, limits or access to city centres (pedestrianised streets, congestion charges, etc.)?

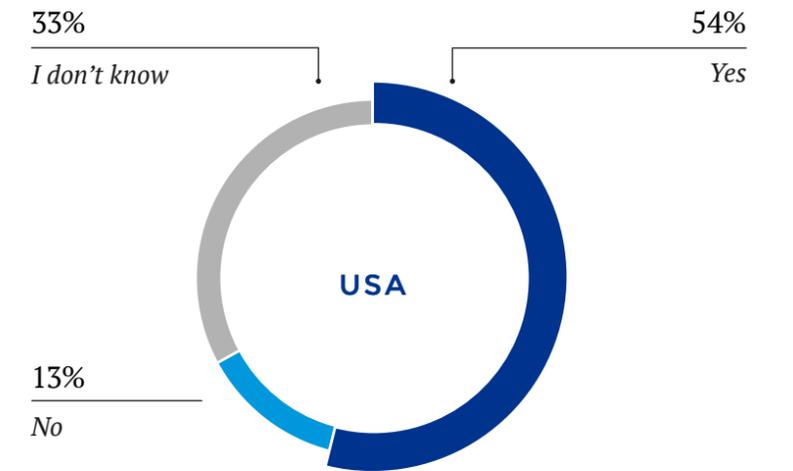
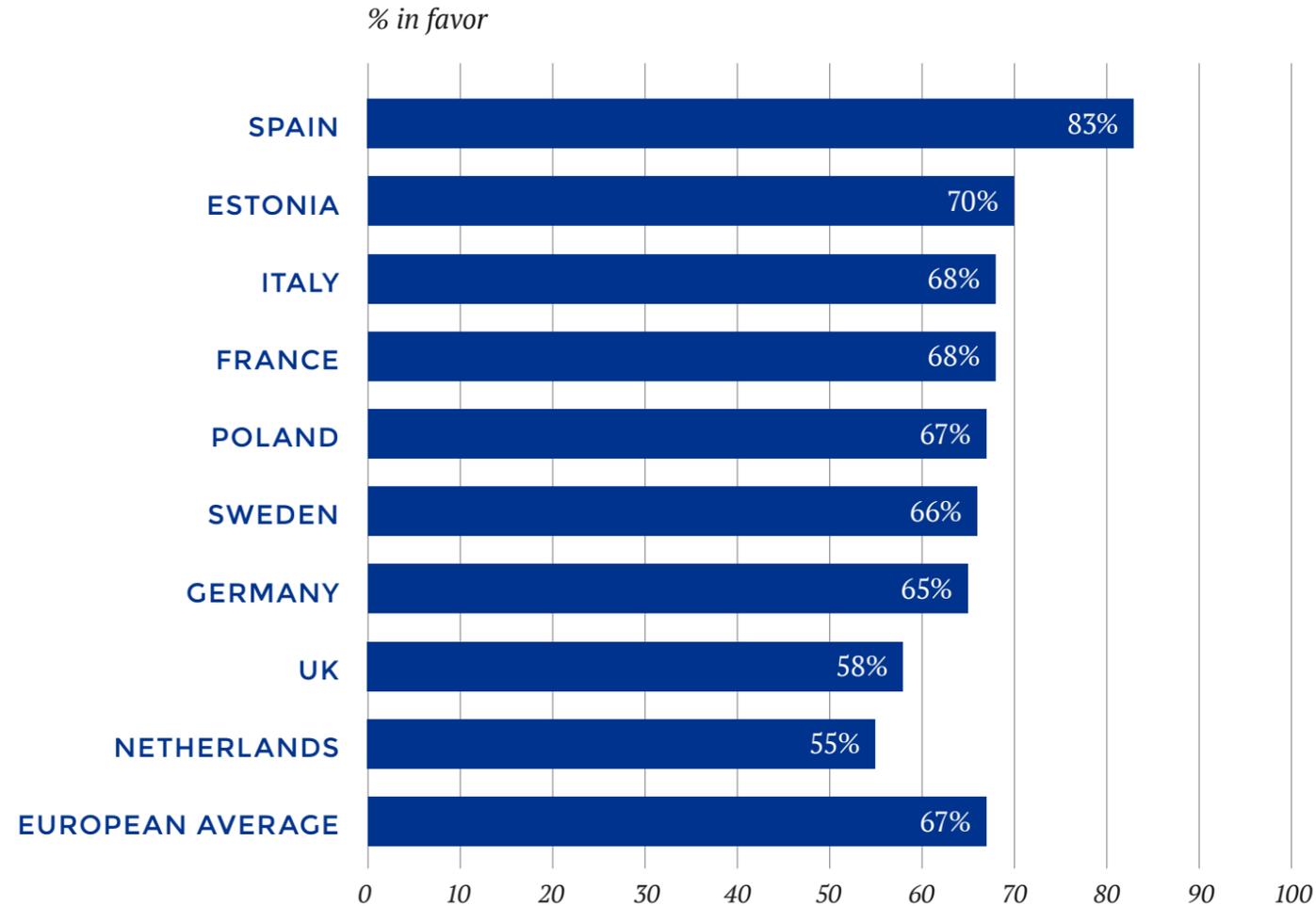
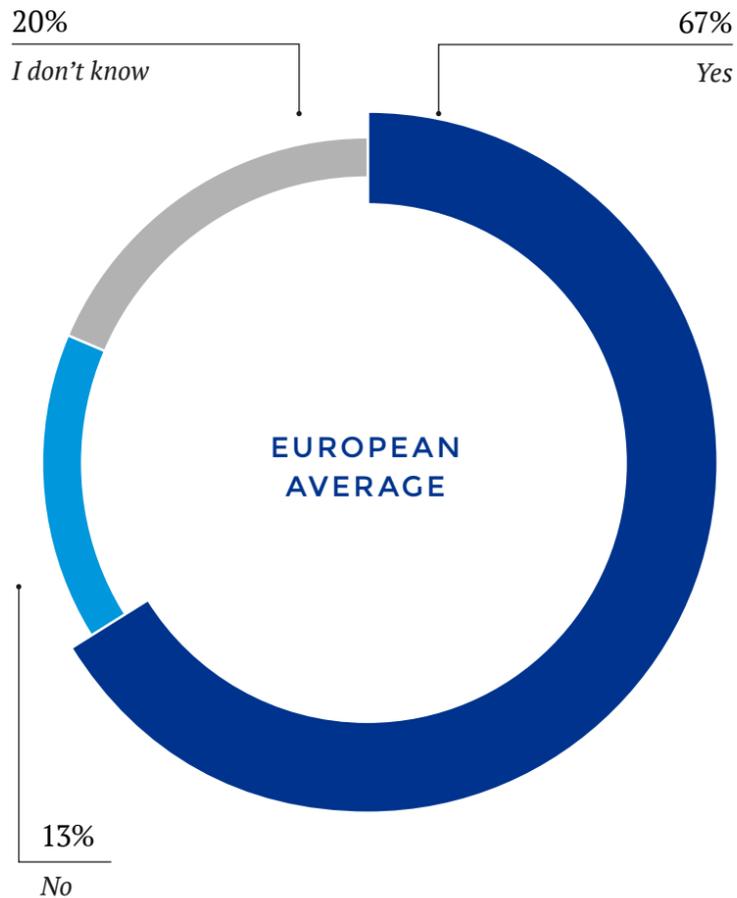


FINDING 9 – COUNTERURBANIZATION

The overwhelming majority of Europeans (67%) support fiscal measures to help people and businesses move to smaller cities and rural areas. Whilst all European countries agree with such measures, the view is particularly popular in Spain (83%) and Estonia (70%). Older cohorts are more likely than younger ones to support the measure. US citizens hold a similar opinion, with only 13% of respondents opposing the measure.

QUESTION:

Over the last decades, more and more people and businesses have been moving to big cities in Europe. Do you support fiscal measures to help people and businesses move to smaller cities and rural areas?



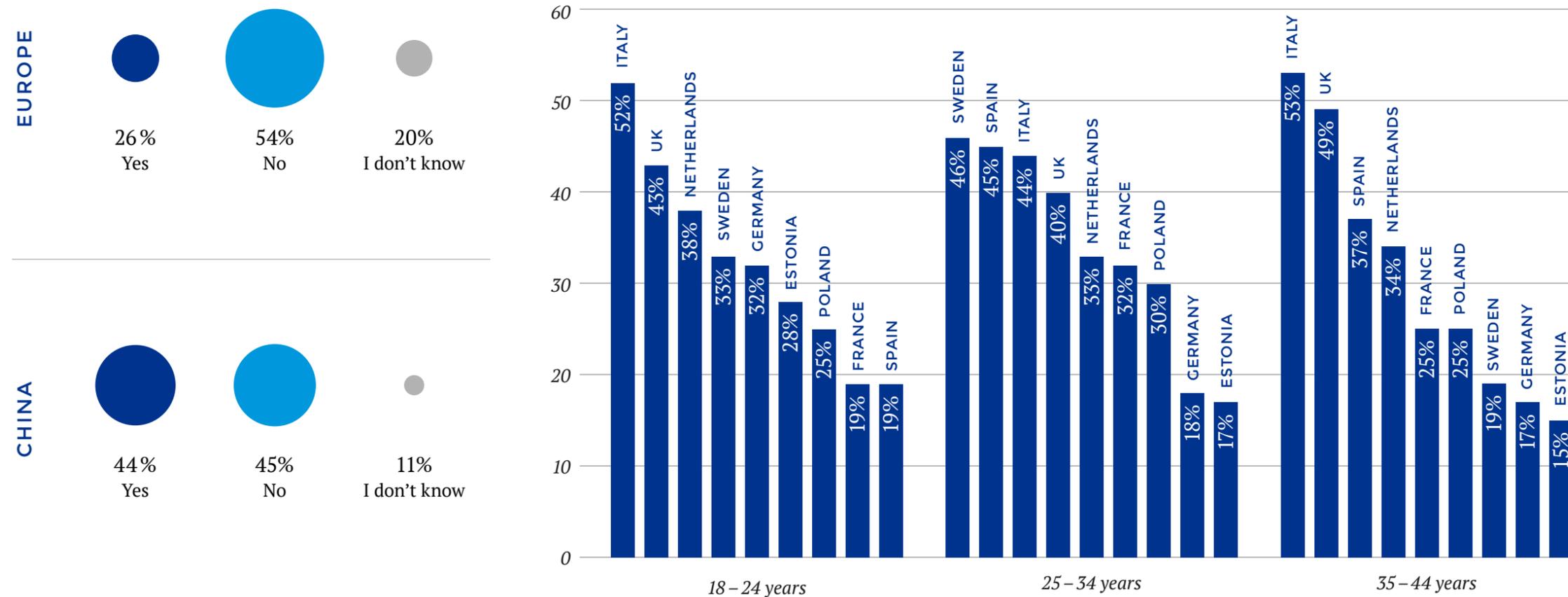
FINDING 10 – BAN ON PETROL AND DIESEL CARS

A significant proportion of Europeans, especially among younger cohorts, support a ban on petrol and diesel cars. Italy is the country with the strongest support for such measure, with a majority of its citizens (43%) in favor of the ban. A majority of young Swedes (46%) and Spaniards (45%) between the ages of 25 and 34 years also support the ban, whilst in the United Kingdom, all age groups under 45 years old think governments should follow the example and ban the manufacturing and selling of petrol and diesel cars. In China, support is even higher, with half of the population in favor of such ban.

QUESTION:

Norway and the Netherlands are discussing a ban on non-electric vehicles by 2025. Do you think governments should ban the manufacturing and selling of petrol and diesel cars from 2025?

Support for banning petrol and diesel cars



SURVEY METHODOLOGY

European Tech Insights 2021 was fielded in January 2021. The data was received in February and analyzed by the IE Center for the Governance of Change in February and March 2021. We surveyed 2,769 adults from 11 countries (Estonia, France, Germany, Italy, Netherlands, Poland, Spain, Sweden, United Kingdom, China and the United States). Samples were representative in terms of age and sex.

Respondents were part of recurrent panels recruited by Netquest or affiliated companies into panels via social media, direct mailing or through referrals from other respondents. They receive small in-kind incentives for responding to each survey.

ESTONIA
FRANCE
GERMANY
ITALY
NETHERLANDS
POLAND
SPAIN
SWEDEN
UK
CHINA
USA

2,769
RESPONDENTS

AUTHORS



**Oscar Jonsson,
Academic Director**

Oscar Jonsson is the Academic Director for the Center for the Governance of Change. He holds a PhD from the Department of War Studies at King's College London. He has been Director of the Stockholm Free World Forum, a visiting researcher at UC Berkeley and a subject-matter expert at the Swedish Armed Forces Headquarters. Oscar has advised governments, armed forces' leadership and financial institutions on strategic affairs and geopolitical risk, and featured in international print and broadcast media.

Oscar's research focuses on the impact of emerging technologies on modern statecraft and conflict, and in particular Russian modern warfare. He is the author of *The Russian Understanding of War* (Georgetown University Press) which is on the Commander of US Special Forces' reading list for 2020 and finalist for the Association of American Publisher's award for scholarly and professional excellence in social sciences 2020.



**Carlos Luca de Tena,
Head of Operations**

Carlos Luca de Tena is a public policy professional who has advised international organisations and top multinational companies in public affairs, mostly in the field of digital economy. He is the Head of Operations of the Center for the Governance of Change. Carlos has worked as a Consultant at Llorente & Cuenca and APCO Worldwide and was in charge of European Affairs at the French Association of Town Mayors.

Carlos holds a master's degree in European Affairs from Sciences Po Paris and the University of Bath and studied as an undergraduate at Sciences Po Paris, Universidad Carlos III de Madrid and the London School of Economics.





ABOUT THE CGC

This study was conducted by the IE Center for the Governance of Change (CGC), an applied-research, educational institution that studies the political, economic, and societal implications of the current technological revolution and advances solutions to overcome its unwanted effects.

The CGC does so by producing pioneering, impact-oriented research that cuts across disciplines and methodologies to unveil the complexity of emerging technologies such as artificial intelligence, big data, blockchain, and robotics, and explores their potential threats and contributions to society.

Moreover, the CGC also runs a number of executive programs on emerging tech for public institutions and companies interested in expanding their understanding of disruptive trends, and a series of outreach activities aimed at improving the general public's awareness and agency over the coming changes. All this for one purpose:

TO HELP BUILD A MORE PROSPEROUS AND SUSTAINABLE SOCIETY FOR ALL.

