TiGRE
Trust in Governance and Regulation in Europe

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Research report describing levels of trust and distrust among actors in the regulatory regimes and analysing the drivers thereof

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Contents

Abbreviations, Participant short names

Abbreviations

CEE	Central and Eastern European
CI	Confidence Interval
ESMA	European Securities and Markets Authority
GDPR	General Data Protection Regulation
ESS	European Social Survey
EU	European Union
OLS	Ordinary Least Squares
SME	Small and medium-sized enterprise
TiGRE	Trust in Government and Regulation in Europe
WVS	World Values Survey

Participant short names

UNIL	Université de Lausanne
UAntwerpen	Universiteit Antwerpen
IBEI	Institut Barcelona d'Estudis Internacionals, Fundacio Privada
HUJI	The Hebrew University of Jerusalem
Uni-Speyer	German University of Administrative Sciences
AU	Aarhus Universitet
UiO	Universitetet i Oslo
UU	Universiteit Utrecht
Kozminski	Akademia Leona Kozminskiego
SCIPROM	SCIPROM Sàrl

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Summary

This report examines the preliminary findings of a large multi-actor, multi-level, multi-sector, and cross-country survey on trust and distrust in European regulatory governance. The survey is part of the **Trust in Governance and Regulation in Europe (TiGRE)** project, which receives funding from the European Union's Horizon 2020 research and innovation program. Through descriptive and explanatory analyses of the **1484 valid responses** from respondents in the nine participating countries, **this report offers an overview of the survey results on trust and distrust and their drivers in regulatory governance across Europe**.

One primary goal of this report is to examine the relationships among actors in regulatory regimes, specifically actors in three sectors: data protection, finance, and food safety. Respondents were asked about their trust and distrust in several general categories of actors, namely national regulatory agencies, ministries, parliament, certification and accreditation bodies, and courts as well as EU regulatory bodies. Overall, while respondents trust, albeit to varying degrees, national regulatory agencies, ministries, parliament, certification and accreditation bodies, and EU regulatory bodies they also feel like they have to be 'watchful' to ensure that the actions of these institutions do not negatively impact their institutions. In other words, while respondents trust these institutions, they also have a degree of distrust in these institutions. Our findings thus provide some evidence that distrust does not appear to be the exact opposite of trust. The only institution respondents felt they did not have to be 'watchful' of (to some degree) was courts. Parliament also stood out; respondents consistently had the most distrust and the least trust in parliament.

In addition to asking about the aforementioned institutions, the survey asked about respondents' trust and distrust in specific supervisory actors – typically regulatory agencies – relevant to the given country's regulatory regime. We find that respondents are most likely to trust that supervisory actors follow sound principles when interacting with others ("integrity") and perform their tasks in a very competent way ("ability"). In contrast, we find that respondents are least likely to trust that supervisory actors take the interests of organisations like theirs into account ("benevolence"). In other words, respondents score supervisory actors higher on the measures of integrity and ability than on the measure of benevolence. These three elements make up the survey's multidimensional measurement of trust. The findings discussed above show an interesting balance of trust and distrust in the relationships among actors in the regulatory regime.

Another goal of this report is to provide a preliminary examination of the drivers of trust. Of specific interest, is whether the sector (data protection, finance, food safety) in which respondents work, the country in which respondents reside, and the type of organisation for which respondents work impacts their trust. There are several interesting preliminary findings. Firstly, across the key explanatory variables (sector, country, type of organisation), there are few consistent patterns. For instance, country and sector differences are not the same for each dependent variable. Secondly, with regards to the explanatory variables for trust and distrust specifically, the pattern is not completely symmetrical, although there are some symmetrical cases. This is an intriguing finding, as it further emphasizes that distrust is not necessarily the opposite of trust. Finally, there is the most consistent pattern for different dimensions of trust in supervisory actors; respondents in different sectors and from different actor types report lower levels of trust relative to the reference category for sectors (data protection) and countries (Poland).

While this report presents some important findings, these **findings are preliminary**; neither the differences in the proportion of respondents in terms of the type of organisation at which they work nor other potentially relevant explanatory variables are taken into account. The goal of this report is to discuss the survey results and present a first, primarily descriptive assessment of the balance of trust and distrust in the relationships among actors in regulatory regimes, as well as the drivers of trust. The results will be examined further in future publications. In addition to trust and distrust relationships, the report also explores trust in the overall regime and respondents' perceptions of regime performance. Moreover, the report includes essential information on the survey itself and on respondents' individual backgrounds and attitudes.

1. Introduction

The TiGRE (Trust in Governance and Regulation in Europe) project provides an encompassing and coherent analytical framework for the study of trust and distrust relationships in regulatory governance. The multidisciplinary research project benefits from the expertise of nine top-level universities and research centers and one SME (small and medium-sized enterprise), which specializes in the management of collaborative research projects. TiGRE receives funding from the European Union's (EU) Horizon 2020 research and innovation program. The project started on 1 January 2020 and will run until 30 June 2023.

A cornerstone of the project is the large multi-actor, multi-level, multi-sector, and cross-country survey on trust and distrust in European regulatory governance. The survey explores the opinions and perceptions of seven different types of stakeholders – members of parliament, regulatory agencies, regulatory intermediaries, executive bodies, regulatees, interest organisations, and ombudsmen (or arbitration committees/bodies) – in three different sectors: data protection, finance, and food safety. It assesses the current levels of reciprocal trust and distrust among stakeholders as well as their perceptions of the level of regulatory consent, compliance, and legitimacy. The survey produces an important quantitative dataset on *both* trust and distrust, thus adding to a growing body of research on trust and, specifically, distrust in regulatory governance.

The aim of this report is twofold. First, it provides a descriptive analysis of levels of trust and distrust in regulatory regimes in general and specific actors within those regimes in particular. This analysis focuses on country variation and sectoral variation, which are two fundamental dimensions of analysis in the TiGRE project and in the study of regulation more generally (Levi-Faur, 2004). Secondly, the report includes an explanatory analysis of the drivers of trust and distrust focusing on individual, organisational, and sectoral explanatory factors.

1.1 Country and sector selection

Nine countries are included in the TiGRE survey: Belgium, Denmark, Germany, Israel, the Netherlands, Norway, Poland, Spain, and Switzerland. The selected countries form a pool of EU member states and associated countries that provide a wide variation regarding several variables of interest. The countries differ in their institutional structure (federal, e.g. Belgium and Germany versus unitary, e.g. the Netherlands, Poland and Israel). Their political systems are also different (consensus, e.g. Switzerland and the Netherlands versus majoritarian democracies, e.g. Poland and Spain). Regarding administrative tradition, the countries cover continental, Napoleonic, Scandinavian, and Central and Eastern European (CEE) traditions.

In terms of country variation, we generally expect that respondents' trust and distrust in regulatory regimes and the different actors therein broadly mirrors the pattern of generalized trust in a country. The project's own review of existing measures of citizens' trust in institutions (Maman et al., 2020) is a useful starting point. The review identified several cross-national surveys of citizens measuring trust in various political and administrative actors and condensed those findings into average scores per country. Based on the latest available figures in the European Social Survey (ESS) from 2016, average trust levels in national actors are ordered as follows, in increasing order: Israel and Poland (same position), Spain, Belgium, Germany, Netherlands, Switzerland, Denmark (data from 2014), Norway. Another measure combines the World Values Survey (WVS) and the European Values Survey (EVS), with the disadvantage that not all countries included in TiGRE are represented. This analysis results in the following order of average trust in national actors (parliament, government, civil service, police, courts), in increasing order: Poland, Spain, Netherlands, Germany, Denmark, Switzerland, Norway. Overall, while different data sources each result in a somewhat different ordering of the countries, there are some consistent patterns when it comes to high, medium and low trust countries. We should therefore expect to see country variation along similar patterns in our survey as well, but we should also not be surprises to see some variation in the ordering of countries.

The TiGRE survey, as well as the TiGRE project as a whole, examines three sectors: data protection, finance, and food safety. The regulatory regimes in these sectors are of utmost social and political importance for the EU and its citizens. Data protection is an emerging major issue at the global level, and the EU has acquired strong leadership concerning data protection regulation (see for instance the recent General Data Protection Regulation (GDPR)). This relatively new issue ultimately affects all public, profit, and non-profit organisations. Financial regulation in the EU is experiencing a process of post-crisis regulatory evolution and institutionalization (cf. the attribution of enforcement powers to European Securities and Markets Authority (ESMA)) in a sector that is vital for the internal market and the economy as a whole. The regulatory regime for food safety operates in a sector that is particularly salient for citizens, while being regularly under stress by the outburst of crises (e.g. BSE crises, Dioxin affair, horsemeat scandal, etc.) that shape its own development.

There is variation on a country level in actor relationships between these three sectors, but trust is a key component in each of the sectors. There is variation on two key variables: (1) the distinction between economic (market-oriented) and social (risk-oriented) regulation, and (2) the degree of agencification[1] and, respectively, of supranational authority of the EU regulator in charge. For example, food safety is an obvious case of social regulation where the ultimate objective of regulation is to protect consumers. Likewise, data protection is primarily about social regulation. In contrast, financial services regulation combines market regulation (ensuring market stability and level playing field) but also social regulation (conduct of business regulation to protect customers). Such **a sectoral perspective provides a key original contribution to the scholarship on trust in governance**, as the study of trust configurations articulating different relationships among actors and of trust processes involving cross-level interactions is fundamental to fully understand the determinants and implications of trust in governance and, in turn, for the governance of trust. In this report, we have no a priori expectation about the ordering of sectors in terms of trust and distrust. However, our general expectation is that respondents from different sectors will differ in terms of their opinions on trust and distrust in regulatory regimes and the actors within those regimes.

1.2 Designing the multi-actor, multi-level, multi-sector, cross-country survey

This section describes the respondent population as well as how we selected and approached respondents.[2] Information on the survey questions is included in the subsequent parts of this report. The TiGRE project teams in each country worked systematically to map their countries' regulatory regimes for data protection, finance, and food safety. Within data protection, focus was placed on (1) health data and (2) the electronic communication of personal data. Within the financial sector, focus was placed on (1) banking and (2) securities. Finally, within the food sector, focus was placed on (1) animal welfare and (2) sustainable farming. Poultry and poultry-meat based products as well as eggs and egg products received special attention within the animal welfare subsector. Likewise, fruit and vegetables received special attention within the sustainable farming subsector.

[1] Agencification is the creation of semi-autonomous agencies (see Verhoest et al. 2012 for a comprehensive account).

[2] The section draws extensively on a non-public technical report on the survey (Bach & Gaspers, 2021).

The development of detailed guidelines ensured consistent sampling across the countries. The aim was to survey the people with the most knowledge of the given sector and/or subsector. The individuals surveyed worked at the following types of organisations: legislative bodies, regulatory agencies, regulatory intermediaries (such as certification and accreditation bodies), executive bodies, regulated organisations (regulatees), interest organisations, and ombudsman/arbitration commissions or bodies.

In organisations that dealt solely with data protection, finance, or food safety, for example a regulatory agency for food safety, the research teams targeted employees working in the top three hierarchical levels, excluding human resources. Additionally, in order to maximize the number of potential respondents, the research teams selected employees working in departments directly dealing with the subsectors. At organisations that dealt only partially with the sector, for example a ministry for telecommunications with a department devoted to data protection, the research teams selected all individuals working in the department, section, etc. relevant to the given sector. This was because those working in the top three hierarchal levels of the organisation may not directly work with one of the given sectors and therefore may have had difficulty answering the questionnaire.

There were two exceptions to the above guidelines. At regulated organisations (regulatees), the goal was to target people specifically working with regulatory compliance. Only one person per regulated organisation (regulatee) was selected, as many organisations only have one compliance officer/person dealing with compliance. For legislative bodies, the research teams were instructed to select all members of the relevant parliamentary committees. This was because these committees are collegial bodies and therefore do not have the same type of hierarchical structure as organisations. The comprehensive guidelines followed by the research teams ensured a representative sample of the entire regulatory regime – from regulatory authorities to regulatees.

As with the mapping, the survey translation followed detailed guidelines to ensure consistency across countries. Those responsible for translating the survey in each of the nine participating countries were instructed to translate as close to the English translation as possible, but also to create text which was easy-to-understand and natural for local respondents. Therefore, deviations from the English translation were allowed when word-to-word translations would not make sense to respondents. This method ensured that the questionnaire is comparable, but also reflects each individual language. The translation as well as the piloting and technical testing took place in several rounds.

The fielding period began in early December 2020, and the survey closed at the end of March 2021. The survey was emailed to over 8,000 stakeholders in the nine participating countries and at the EU level. In April and May 2021, the datasets were harmonized[1] and, after cleaning, there was a total of 1484 valid responses from stakeholders in the nine participating countries and at the EU level. Data from the EU level is not included in this report, except for the present section, including Figure 1. This is because the questions asked to the EU respondents differ from those asked to the national level respondents. In addition, the EU level survey did not include regulatees, thus potentially biasing the descriptive results, which are unweighted (see next section).

[1] More information on harmonization is included in the non-public technical report on the survey (Gaspers & Bach, 2021).

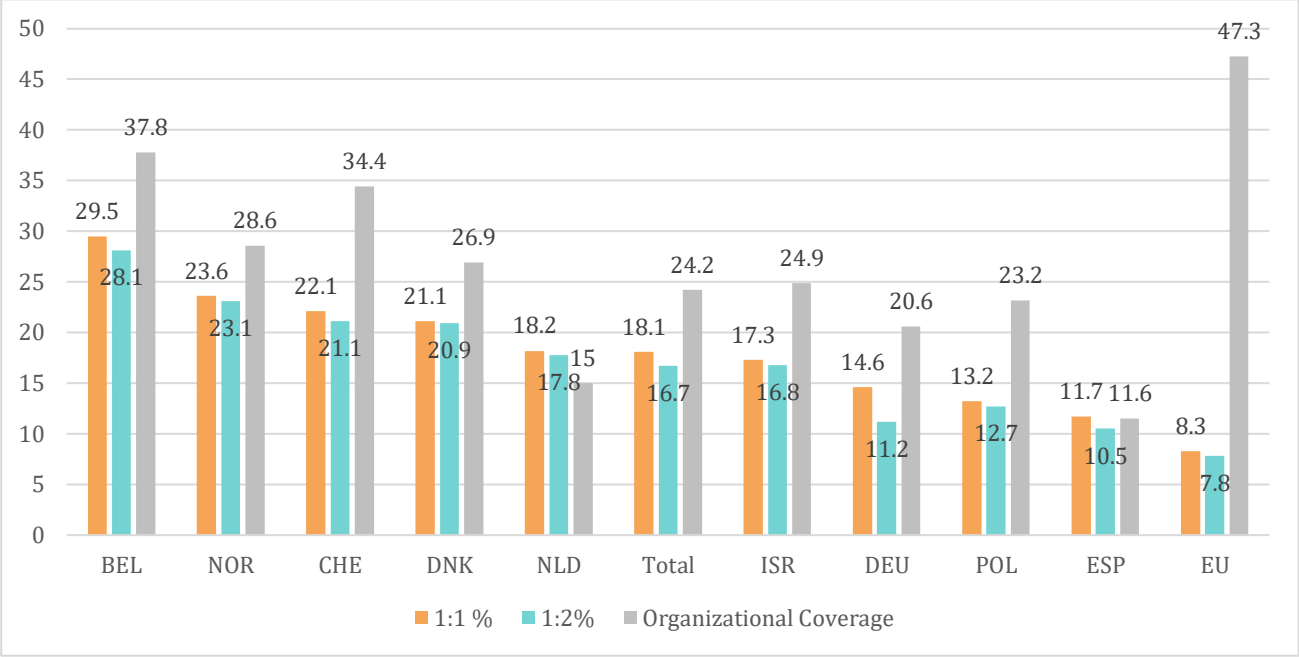

Figure 1: Response rates (%, N=1484)

Different login options led to the calculation of three different response rates: 1:1, 1:2, and organisational coverage, as shown in Figure 1. The 1:1 response rate is calculated by adding all of the email addresses in each country together. When personal email addresses were not available, the research teams recorded generic email addresses (such as 'contact@organisation.com'). Emails containing links to the survey that could be used by multiple respondents at the same organisation were sent to these generic email addresses. The emails asked for the survey to be forwarded to the relevant person/people at the organisation. Thus, the 1:2 response rate is calculated by multiplying the number of these generic email addresses by two – as those emails targeted multiple respondents – and adding it to the sum of the personal email addresses. The third and final response rate, labelled 'organisational coverage', examines the total number of unique responding organisations. This response rate hence provides information on the representativeness of the dataset in terms of covering different organisations relative to the total population of organisations.

1.3 Exploring the data

This report presents an overview of the results of the TiGRE project survey. Specifically, the report (1) presents a descriptive comparative analysis of the survey results and explores the drivers of trust and distrust patterns in regulatory regimes and (2) provides a unique assessment of the level of trust and distrust in regulatory regimes. The results are aggregated by country and by sector, and key differences and similarities between the countries and sectors are highlighted. Ultimately, the report outlines the determinants of patterns, variations, and dynamics of trust and distrust between stakeholders at different levels within the regulatory regimes.

This report presents preliminary findings on country and sector variation. The means presented throughout the report are unweighted. Thus, the report does not take into consideration differences in the number of respondents per country or per sector. Furthermore, the survey respondents work at different types of organisations. This report does not take into consideration the differences in the proportion of respondents in terms of (1) the type of organisation at which they work and (2) other potentially relevant explanatory variables. Based on these facts, the descriptive findings should be considered preliminary. The explanatory analysis controls for some of these biases, and future analyses will fully address the effects of potential biases within the respondent population.

In the report, confidence intervals (CIs) are included for each graph that presents means. These confidence intervals provide the range of the values for the "true" mean of a given variable. We report CIs at the 95% level of confidence. The CIs are a measure of the certainty that the reported mean is the actual mean. For smaller samples and samples with more variation in the answers (the values of the variables), confidence intervals will be larger.

We also performed some explorative analyses on the full dataset (all sectors and all countries, except the EU level respondents) in order to gauge potential factors that could explain perceptions of trust, regulatory consent, legitimacy, and compliance. In order to explore the relationships of interest, we treated the dependents as continuous when they were measured on a 10-point Likert scale. This allowed the use of ordinary least squares (OLS) regression. However, the dependents on a smaller Likert scale (e.g. on a 7-point scale), were treated as ordered categorical data. In order to examine these data, we made use of an ordered logit model and calculated odds ratios. All the models included the same set of explanatory factors:

- the sector the respondent answers questions about (with data protection being the reference category);
- the country the respondent resides in (with Poland being the reference category as respondents' generalized trust in other people is lowest in Poland compared to the other countries studied);
- the kind of organisation to which the respondent belongs (i.e. the actor type), being organisations classified as 'public actors' (encompassing respondents from parliamentary commissions, regulatory agencies, executive bodies, and non-judiciary arbitration bodies), regulatory intermediaries, regulated organisations, and interest groups. Public actors are the reference category;
- some potentially relevant socio-demographics about the respondent, namely age, gender, education level, length of employment at their current organisation, and whether or not they hold a leadership position (specifically whether respondents hold a position in which they manage no teams/units, 1-2 teams/units, or more than 2 teams/units);
- the generalized trust respondents report to have in other people (as a measure of general trust propensity);
- the attitude respondents report to have towards government regulation of the economy.

In this report, only the variables that showed significant positive and negative effects are listed. However, the results of these analyses are preliminary and should be treated with some caution, as more refined analyses using econometrically robust techniques are needed to validate the results. These more refined analyses will be reported upon in the scientific publications that will follow after this report. Therefore, in this report the results are outlined in text rather than tables.

The body of the report consists of five sections: (1) respondents' attitudes and background (section 2), (2) confidence in the regulatory regime (section 3), (3) regime performance (section 4), (4) trust and distrust in actors (section 5), and (5) the experiment (section 6). The survey questions, which respondents were asked, are presented at the beginning of each section. Descriptive and explanatory findings are presented next, followed by a short discussion of these findings. As mentioned previously, the goal of this report is to present preliminary findings from the TiGRE survey and, through a discussion of the results, provide an assessment of the balance of trust and distrust in the relationships among actors in regulatory regimes, as well as the drivers of trust. This report focuses on the presentation of descriptive and (preliminary) explanatory findings and does not discuss the findings in view of the academic literature.

2. Respondents' Background and Attitudes

This section presents data on respondents' (1) personal background and (2) generalized trust in people and attitude towards government regulation of the economy.

2.1 Personal background questions

In terms of their personal background, respondents were asked about their age, gender, education level, length of employment at their current organisation, and whether or not they have a leadership role. Respondents' age varies (see Figure 2), but the largest percentage of respondents are in the age group 46-55. A majority (62.8%) of respondents are male (see Figure 3). Most respondents are highly educated, and the majority (59.1%) of the respondents hold a postgraduate degree (see Figure 4). The length respondents have worked at their current organisation varies. The largest percentage of respondents (30.2%) have worked at their current organisation between one and five years (see Figure 5). While whether or not respondents hold a leadership position varies, a majority of respondents (67.9%) hold a leadership position in which they manage at least one team/unit (see Figure 6). This distribution reflects the mapping, which specifically targets individuals with leadership roles.

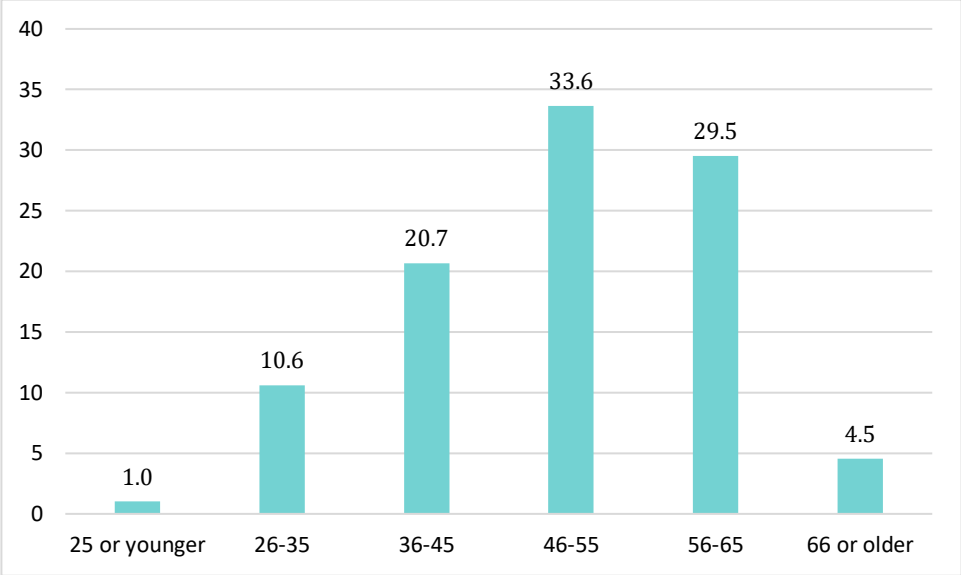

Figure 2: Age (%, N=1189)

Figure 2 depicts the percent of answers per answer category for the question: 'How old are you?'

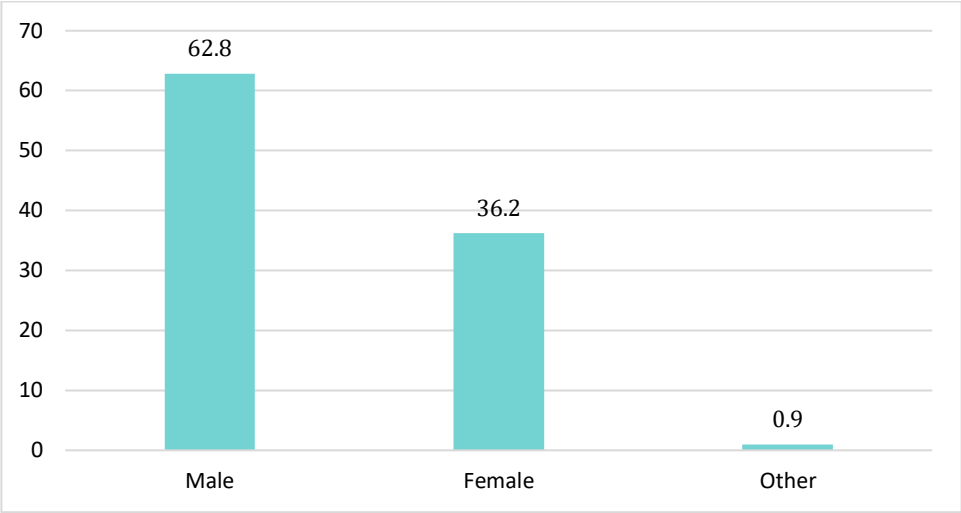

Figure 3: Gender (%, N=1187)

Figure 3 depicts the percent of answers per answer category for the question: 'Are you *(answer categories: male, female, other)'?*

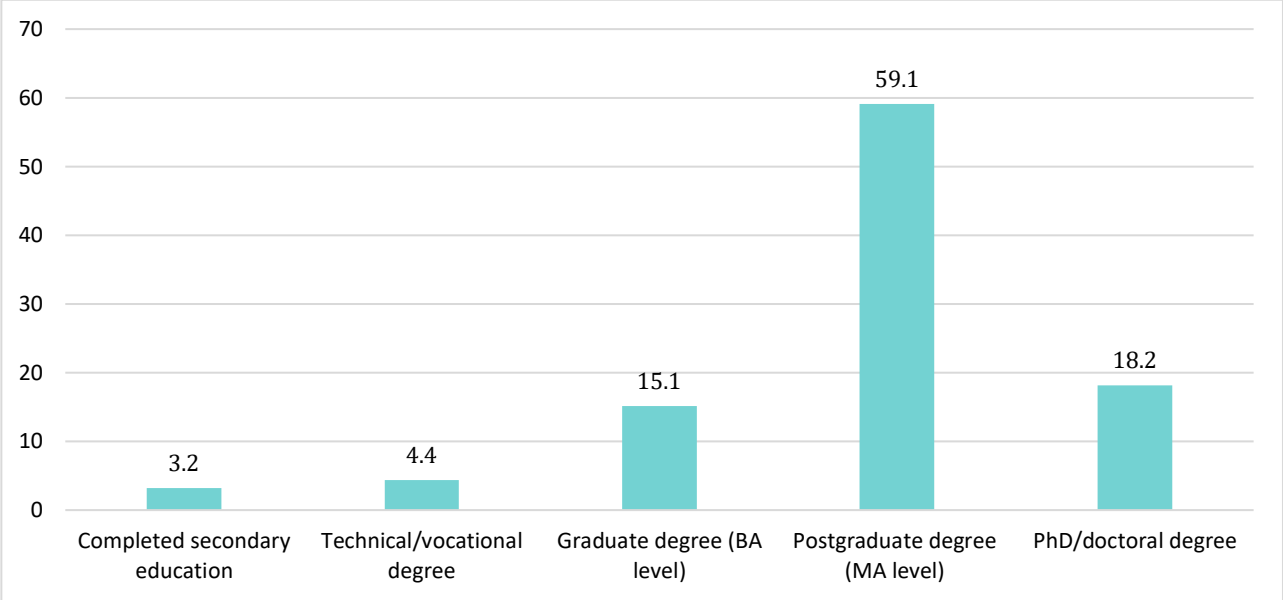

Figure 4: Education level (%, N=1184)

Figure 4 depicts the percent of answers per answer category for the question: 'What is your highest educational qualification?'

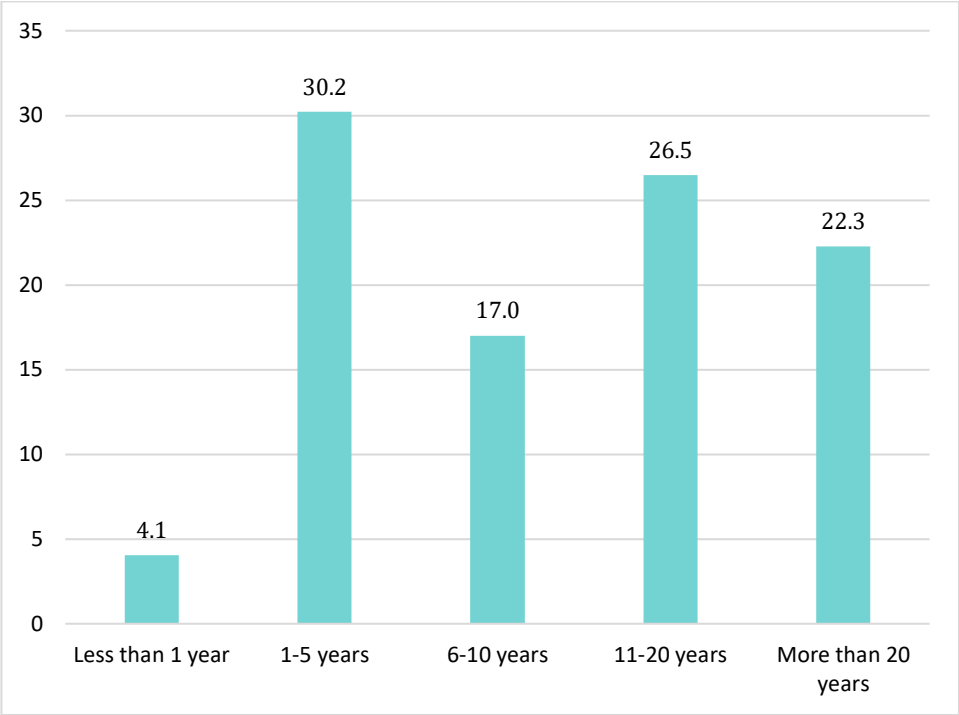

Figure 5: Length of employment (%, N=1182)

Figure 5 depicts the percent of answers per answer category for the question: 'For how long have you worked at your current organisation?'

Figure 6: Leadership position (%, N=1184)

Figure 6 depicts the percent of answers per answer category for the following question: 'What kind of position do you have in your organisation?' The phrasing of the question is intentionally broad in order to avoid anonymity concerns among respondents and because the survey covered a heterogeneous group of respondent organisations, including small and large companies and government bureaucracies, amongst others.

2.2 Respondents' generalized trust in people and attitudes towards government regulation

As mentioned above, respondents were asked about (1) their generalized trust in people and (2) their attitude towards government regulation of the economy. As with the information about respondents' personal backgrounds, this information is used for statistical analysis (regression analyses) in the present report (see section 1.3).

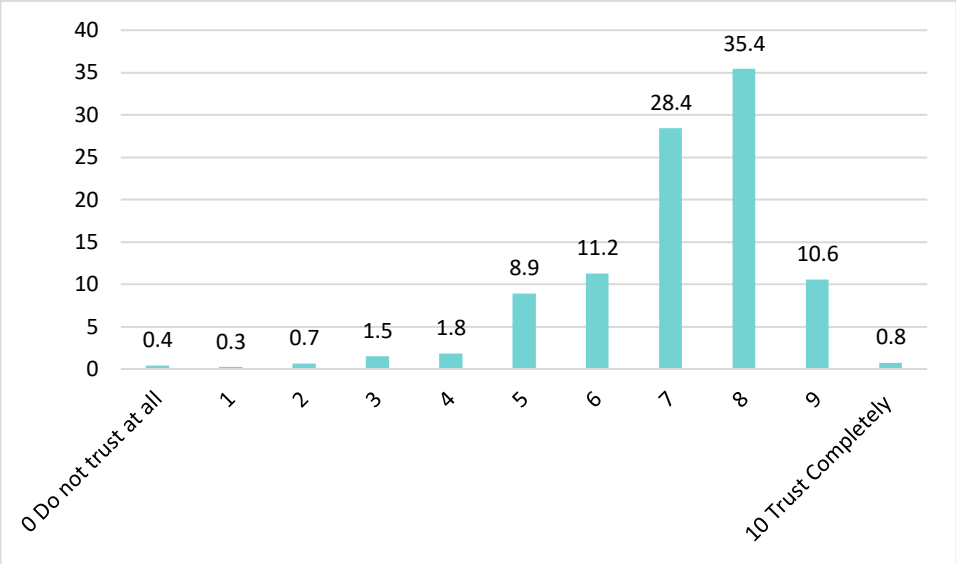

Figure 7: Generalized trust in people (%, N=1192)

To measure respondents' generalized trust in people, respondents were asked the question: 'In general, how much do you trust most people?' Respondents answered on an 11-point scale from zero to ten, where '0' was 'Do not trust at all' and '10' was 'Trust completely'. Figure 7 depicts the percent of answers per answer category for this question. Approximately 4.7% of respondents answer on the 'Do not trust at all' end of the scale (answer categories 0 through 4), whereas 86.4% of respondents answer on the 'Trust completely' end of the scale (answer categories 6 through 10). Approximately 8.9% of respondents chose the middle category (answer category 5).

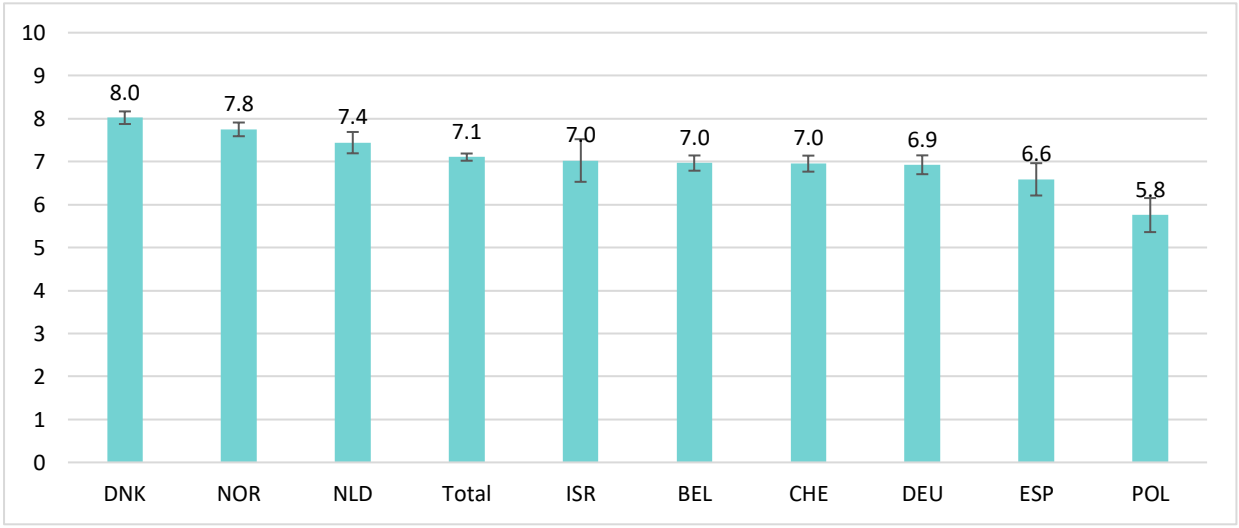

Figure 8: Generalized trust in people (means, N=1192)

Figure 8 depicts the country-specific means for the question, 'In general, how much do you trust most people?' Again, respondents answered on an 11-point scale from zero to ten, where '0' was 'Do not trust at all' and '10' was 'Trust Completely'. On average, generalized trust in people is highest among respondents in Denmark (mean=8.0) and lowest among respondents in Poland (mean=5.8). On average, respondents in Denmark and Norway have significantly higher trust than respondents in Belgium, Switzerland, Germany, Spain, and Poland. Moreover, on average respondents in Israel, Belgium, Switzerland, Germany, and Spain have significantly higher trust than respondents in Poland.

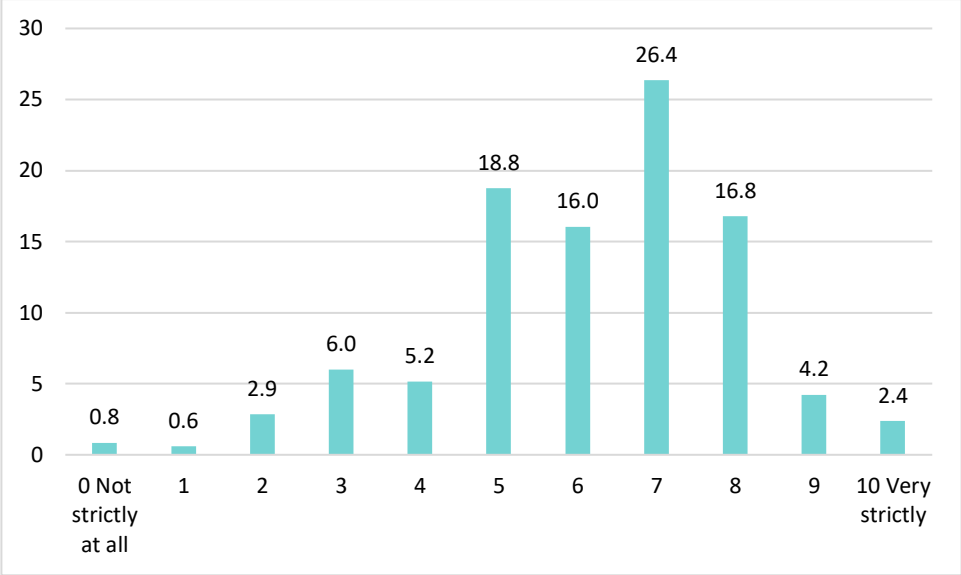

Figure 9: Attitude towards government regulation of the economy (%, N=1184)

Respondents' attitudes towards government regulation of the economy were measured by asking the question: 'Think about the economy in general. How strictly should government regulate business to protect the people? Please bear in mind that strict regulation may affect businesses' competitiveness.' Respondents answered on a scale from zero to ten, where '0' was 'Not strictly at all' and '10' was 'Very strictly'. Figure 9 depicts the percent of answers per answer category for this question.

Approximately 15.5% of respondents answer on the 'Not strictly at all' end of the scale (answer categories 0 through 4), whereas 65.8% of respondents answer on the 'Very strictly' end of the scale (answer categories 6 through 10). Approximately 18.8% of respondents chose the middle category (answer category 5).

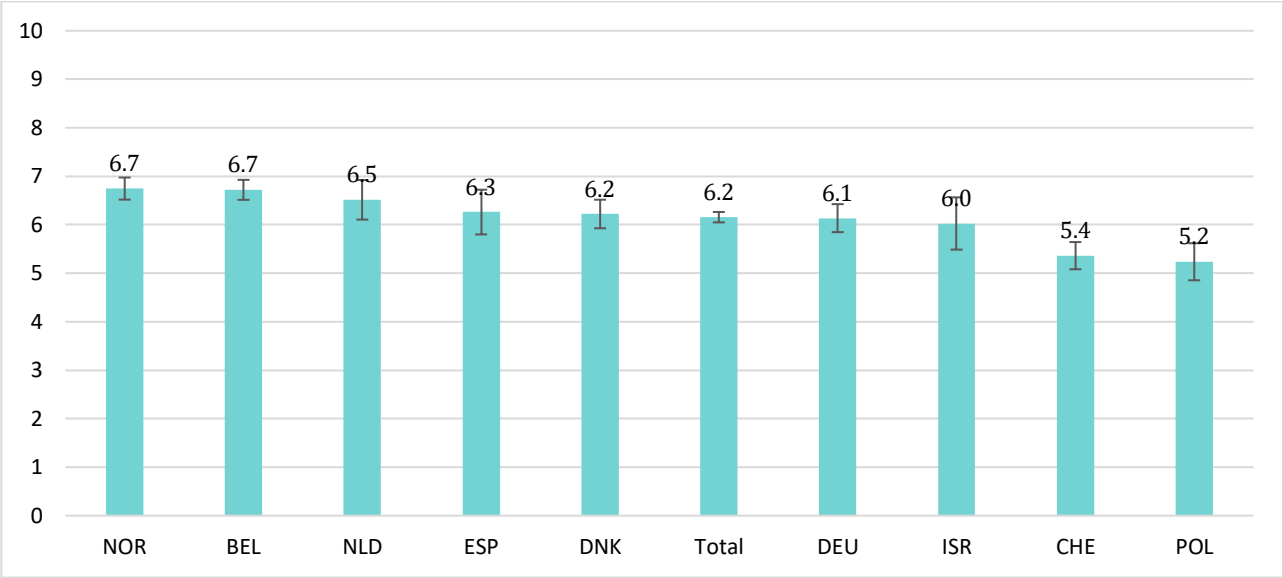

Figure 10: Attitude towards government regulation of business by country (means, N=1184)

Figure 10 shows the means for the abovementioned question, namely: 'Think about the economy in general. How strictly should government regulate business to protect the people? Please bear in mind that strict regulation may affect businesses' competitiveness. Respondents in Norway and Belgium (means=6.7), are, out of the nine countries, on average most in favor of strict regulation of business. The Netherlands, Spain, and Denmark have means greater than or equal to the total mean (total mean=6.2), and Germany, Israel, Switzerland, and Poland have means less than the total mean. Respondents in Poland are least in favor of strict regulation of the economy (mean=5.2). Norway, Belgium, the Netherlands, Spain, Denmark, and Germany differ significantly from Switzerland, and Poland; respondents in Norway, Belgium, the Netherlands, Spain, Denmark, and Germany have a more positive attitude towards stricter government regulation of business than respondents in Switzerland and Poland.

3. Confidence in Regulatory Regimes

This section examines respondents' perspectives regarding confidence in data protection, financial services, and food safety regulation. It also looks at how confidence in the abovementioned sectors has changed over the past five years. Measuring confidence in an entire regulatory regime can be challenging. To gauge confidence in the regime, respondents – who are experts in their field – were asked to take a citizen perspective (see the questions below). Please note that we consider 'confidence' to be a near synonym to 'trust'. A key difference here is that trust relations unfold between a trustor and a trustee, whereas the questions are explicitly formulated in a general manner without indicating a specific trustee (from the respondents' perspective).

The survey questions about confidence in the regulatory regime (see below) provide a measurement for the general performance of the regime. Although the questions specifically examine respondents' perspectives of *citizens'* confidence in the regulation of personal data, financial assets, and food, in our discussion of the results, we write about *respondents'* confidence in the regulatory regime. We see these questions as an indirect measurement of respondents' confidence in the regulation of their sector.

Q1: Confidence in the regulatory regime

- Think about how the protection of personal data is regulated in [country]. How confident can citizens be that their personal data is handled safely?
- Think about how financial services are regulated in [country]. How confident can citizens be that their financial assets are handled safely?
- Think about how food is regulated in [country]. How confident can citizens be that the food they eat is safe?

Scale: (1) Completely unconfident, (2) Unconfident, (3) Rather unconfident, (4) Neither unconfident nor confident, (5) Rather confident, (6) Confident, (7) Completely confident

Q2: Change in confidence in the regulatory regime

- We are now asking you to reflect on the past. Compared to the situation approximately five years ago, can citizens now be more or less confident that their data is handled safely?
- We are now asking you to reflect on the past. Compared to the situation approximately five years ago, can citizens now be more or less confident that their financial assets are handled safely?
- We are now asking you to reflect on the past. Compared to the situation approximately five years ago, can citizens now be more or less confident that the food they eat is safe?

Scale: (1) Much less confident, (2) Less confident, (3) Slightly less confident, (4) Neither less nor more confident, (5) Slightly more confident, (6) More confident, (7) Much more confident

3.1 Exploring the data

This section explores respondents' answers to Q1 and Q2 (see above). Graphs for both the percent of answers per answer category and means are presented.

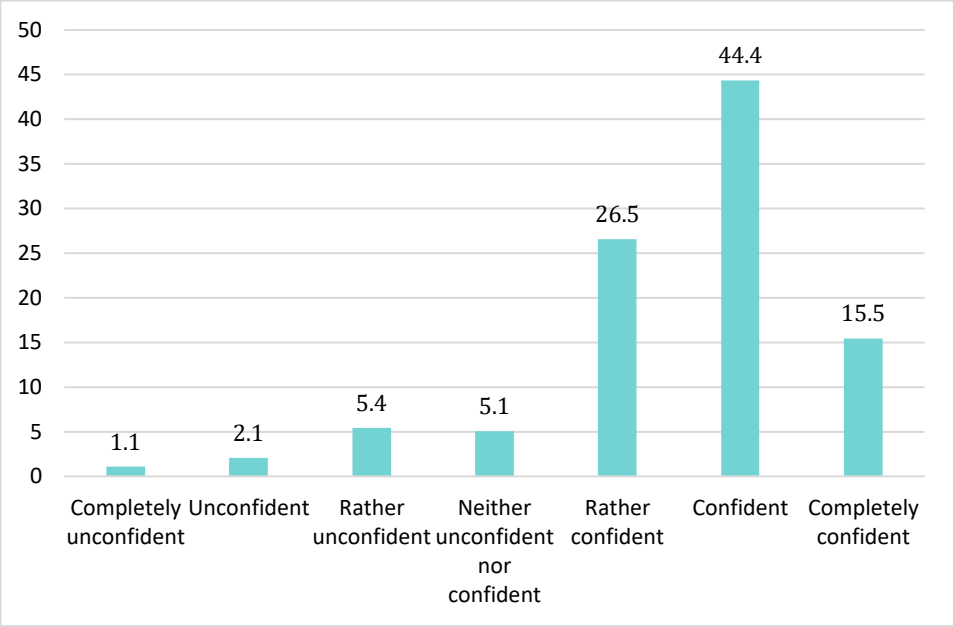

Figure 11: Confidence in the regulatory regime (%, N=1398)

First, respondents were asked about their confidence in the regulation of their sector (see Q1 above) and asked to answer on a scale from one to seven, where '1' was 'Completely unconfident' and '7' was 'Completely confident'. Figure 11 presents the percent of answers per answer category for this question.

Approximately 8.6% of respondents answer on the unconfident end of the scale (answer categories 1 through 3), whereas 86.4% of respondents answer on the confident end of the scale (answer categories 5 through 7). Approximately 5.1% of respondents chose the answer category neither unconfident nor confident (answer category 4).

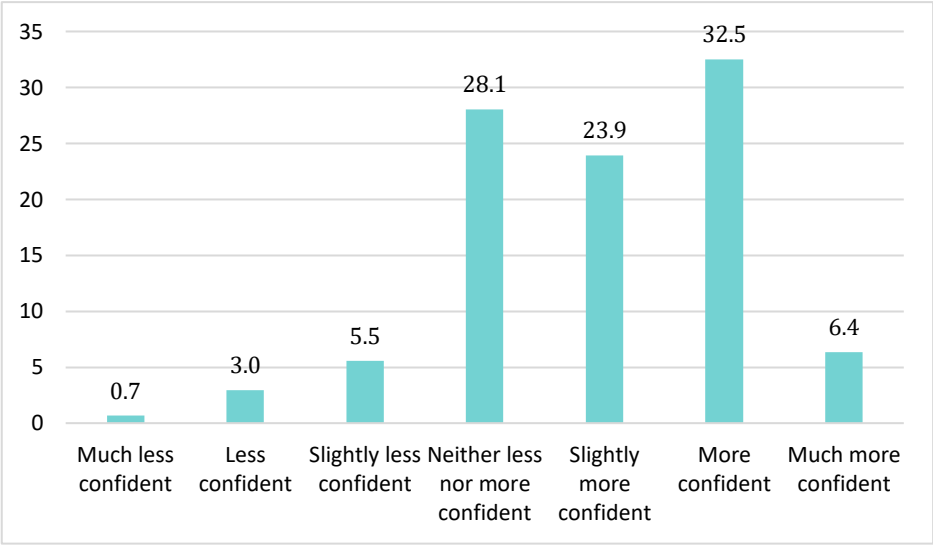

Figure 12: Change in confidence in the regulatory regime (%, N=1354)

Next, respondents were asked whether their confidence in the regulatory regime changed (see Q2 above) and asked to answer on a scale from one to seven, where '1' was 'Much less confident' and '7' was 'Much more confident'. Figure 12 depicts the percentage of answers per answer category.

Approximately 9.2% of respondents answer on the less confident end of the scale (answer categories 1 through 3), indicating that confidence has declined, whereas 62.8% of respondents answer on the more confident end of the scale (answer categories 5 through 7), indicating that confidence has increased. Approximately 28.1% of respondents chose the middle category (answer category 4), indicating no change to confidence in the regulatory regime.

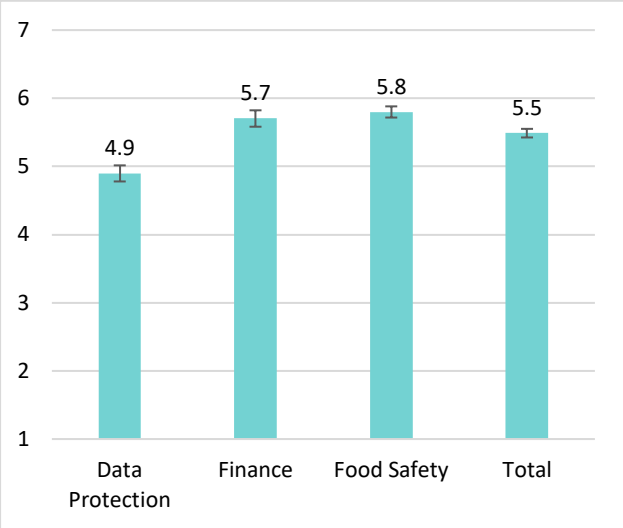

Figure 13: Confidence in regulatory regimes across sectors (means, N=323-627)

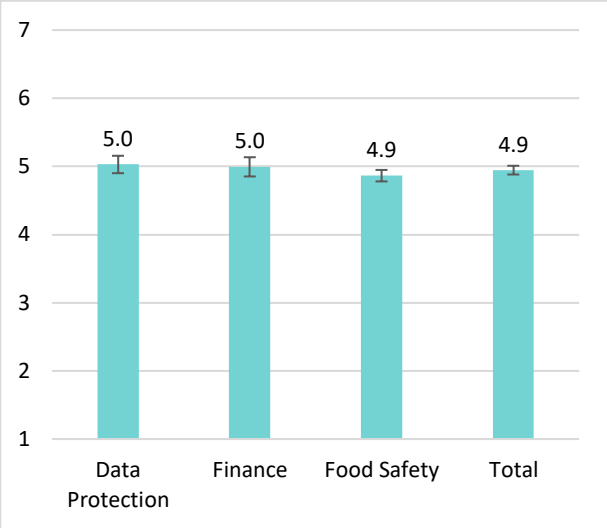

Figure 14: Change in confidence in regulatory regimes across sectors (means, N=314-619)

Figure 13 depicts the means for confidence in the regulatory regime and Figure 14 depicts the means for change in confidence in the regulatory regime. These graphs break down the data by sector and data for all countries is included.

As shown in Figure 13, on average respondents have less confidence in the regulation of personal data than in the regulation of financial services and food; this difference is significant. However, in all sectors, respondents on average have a degree of confidence in regulation (means > 4, 4=Neither unconfident nor confident).

Figure 14 depicts the means for change in confidence in the regulatory regime. Respondents' confidence in all three regimes has, on average, increased over the past five years (means > 4, 4=Neither less nor more confident). The means for all three sectors are very similar; there are no significant differences.

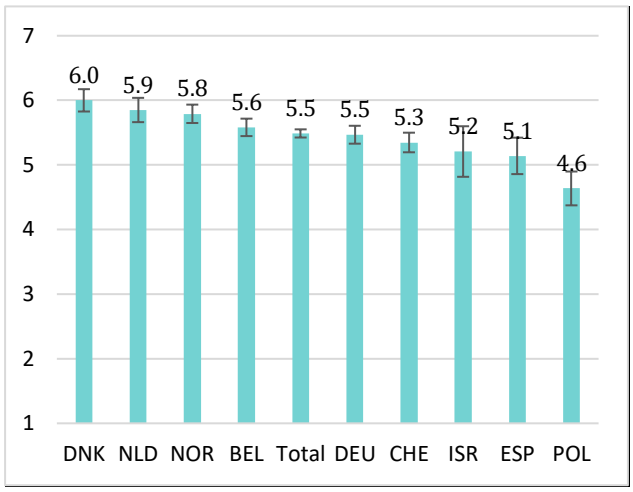

Figure 15: Confidence in regulatory regimes across countries (means, N=1398)

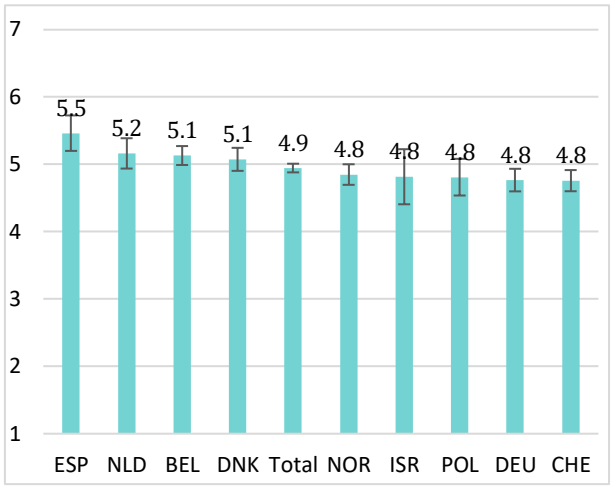

Figure 16: Change in confidence in regulatory regimes across countries (means, N=1354)

Figure 15 and Figure 16, respectively, depict the means for confidence in the regulatory regime and change in confidence in the regulatory regime across countries. Data from all sectors is included in these analyses.

In terms of confidence in regulatory regimes (see Figure 15), Denmark, the Netherlands, Norway, and Belgium have means greater than the total mean (total mean=5.5), and Germany, Switzerland, Israel, Spain, and Poland have means less than or equal to the total mean. On average, respondents in Denmark have the highest confidence in regulatory regimes (mean=6.0) and respondents in Poland the lowest confidence in regulatory regimes (mean=4.6). Confidence levels in Denmark, the Netherlands, Norway, Belgium, Germany, and Switzerland differ significantly from confidence levels in Poland; confidence levels in Poland are on average significantly lower than in Denmark, the Netherlands, Norway, Belgium, Germany, and Switzerland. Moreover, Denmark, the Netherlands, and Norway differ significantly from Switzerland, Israel, Spain, and Poland. In all countries, however, the mean is greater than four (4=Neither unconfident nor confident). Thus, on average, respondents have a degree of confidence in the regulatory regime.

Change in confidence in regulatory regimes (see Figure 16) varies to a lesser degree than present-day confidence in regulatory regimes (see Figure 15). However, there are country differences. Spain has seen the most change in confidence in regulatory regimes (mean = 5.5). Spain, the Netherlands, Belgium, and Denmark have means greater than the total mean (total mean=4.9), and Norway, Israel, Poland, Germany, and Switzerland have means less than the total mean. Spain, where change in confidence is relatively high, differs significantly from Germany and Switzerland, where change in confidence is relatively low. Importantly, the means for change in confidence in regulatory regimes are greater than four (4=Neither less nor more confident). Thus, on average, respondents are more confident in regulatory regimes now than they were five years ago.

It is important to note that in countries where there is high confidence in regulatory regimes, there may be less change in confidence in regulatory regimes. However, interestingly, respondents in Denmark, the Netherlands, and Belgium, countries in which respondents, comparatively, report the highest confidence in regulatory regimes, also report the most (means > total mean) positive change in confidence in regulatory regimes.

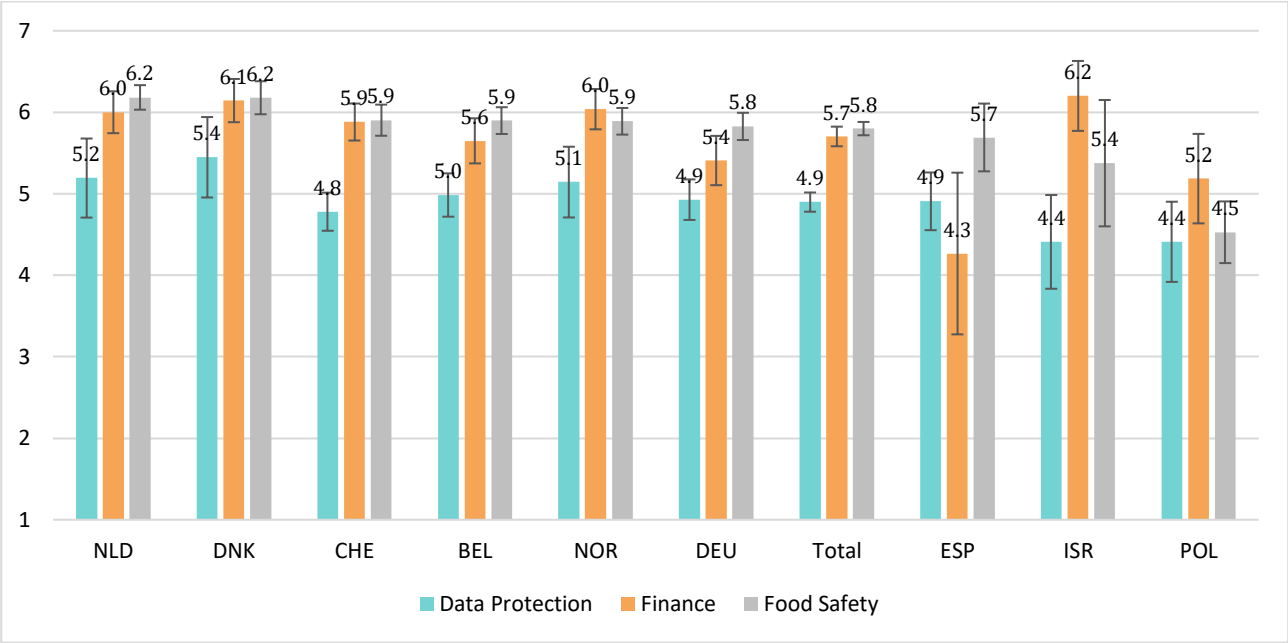

Figure 17: Confidence in regulatory regimes across countries and sectors (means, N=323-627)

Figure 17 depicts the means for confidence in regulatory regimes across both countries and sectors. The observations are ordered from the highest mean to the lowest mean by the variable, 'Food Safety'.

For data protection, Denmark, the Netherlands, Norway, and Belgium all have means greater than the total mean (total mean=4.9); Spain and Germany have means equal to the total mean; and Switzerland, Israel, and Poland have means less than the total mean. Confidence in data protection regulation is highest in Denmark (mean=5.4) and lowest in Israel and Poland (means=4.4). However, there are no significant differences between countries.

For finance, Israel, Denmark, the Netherlands, Norway, and Switzerland all have means greater than the total mean (total mean=5.7), and Belgium, Germany, Spain, and Poland have means less than the total mean. Confidence in financial regulation is highest in Israel (mean=6.2) and lowest in Spain (mean=4.3). There are significant differences between the countries; on average respondents in the Netherlands, Denmark, Switzerland, Belgium, Norway, and Israel have significantly higher levels of confidence in the regulatory regime for finance than respondents in Spain. Denmark differs significantly from both Spain and Poland. However, it is important to note that respondent numbers in Spain are relatively low, indicated by the large confidence interval.

For food safety, the Netherlands, Denmark, Switzerland, Belgium, Norway, and Germany all have means greater than or equal to the total mean (total mean=5.8), and Spain, Israel, and Poland have means less than the total mean. Confidence in food regulation is highest in the Netherlands and Denmark (mean=6.2) and lowest in Poland (mean=4.5). There are significant differences between countries; on average respondents in the Netherlands, Denmark, Switzerland, Belgium, Norway, Germany, and Spain have significantly higher levels of confidence in the regulatory regime for food than respondents in Poland.

In several countries, respondents have on average comparatively low confidence in the regulation of their sector. Trust in financial regulation is especially low in Spain in comparison with the other countries, although there is a high degree of statistical uncertainty for this observation (see CI bar). There is also, comparatively, very low confidence in food safety regulation in Poland. However, in all countries the means are greater than four (4=Neither unconfident nor confident). Thus, respondents on average have a degree of confidence in the regulatory regime.

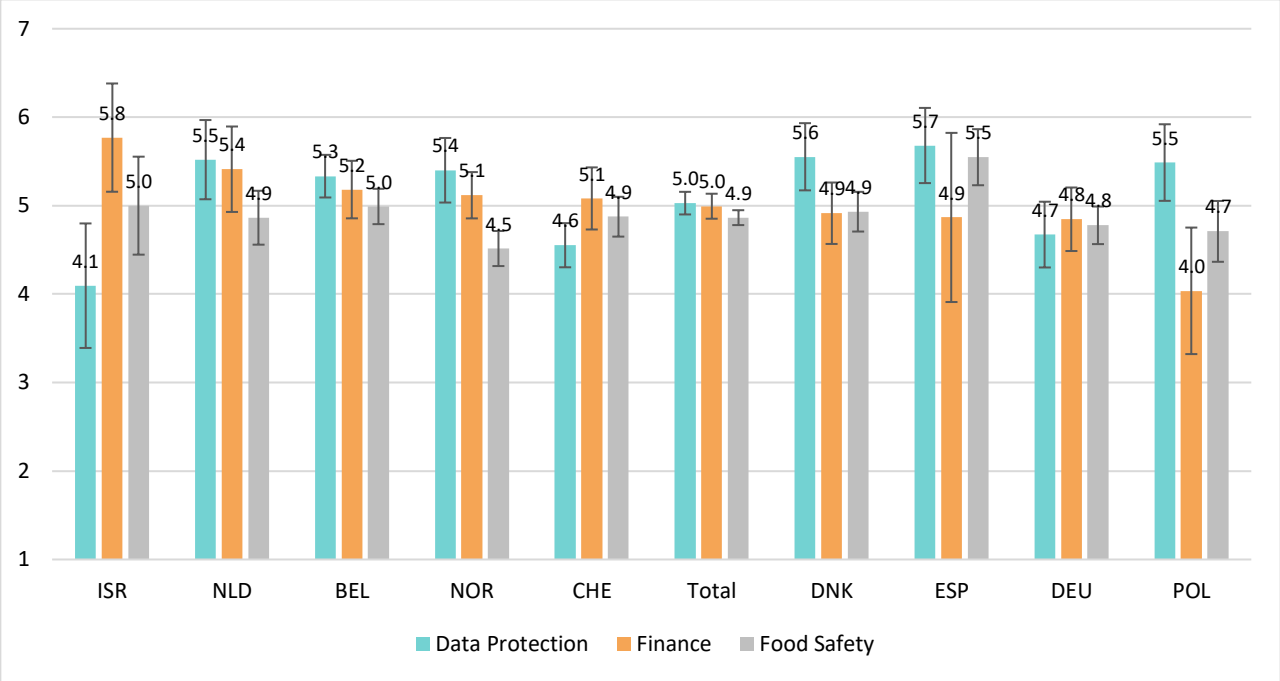

Figure 18: Change in confidence in the regulatory regime across countries and sectors (means, N=314-619)

Figure 18 depicts means for change in confidence in regulatory regimes across countries and sectors. It is important to note, once again, that respondents were asked whether they believe citizens have less or more confidence in the regulation of their sector now than they did five years ago (please see section 3.0 for the exact question formulation). The observations are ordered from the highest mean to the lowest mean by the variable, 'Finance'. For all countries and sectors, respondents on average report an increase in confidence (means > 4, 4=Neither less nor more confident). When writing about 'change' below, we therefore refer to a perceived increase in confidence.

For data protection, Spain, Denmark, the Netherlands, Poland, Norway, and Belgium all have means greater than the total mean (total mean=5.0) and Germany, Switzerland, and Israel have means less than the total mean. Change in confidence in data protection regulation is highest in Spain (mean=5.7) and lowest in Israel (mean=4.1). The Netherlands, Belgium, Norway, Denmark, Spain, and Poland are significantly different from Israel and Switzerland; respondents in Israel and Switzerland on average report relatively less change in confidence in the regulatory regime for data protection. Moreover, Denmark and Spain differ significantly from Germany.

For finance, Israel, the Netherlands, Belgium, Norway, and Switzerland all have means greater than the total mean (total mean=5.0), and Denmark, Spain, Germany, and Poland have means less than the total mean. Change in confidence in financial regulation is highest in Israel (mean=5.8) and lowest in Poland (mean=4.0). Israel, the Netherlands, Belgium, and Norway differ significantly from Poland; on average respondents in Poland report have relatively less change in confidence in the regulatory regime for finance.

For food safety, Spain, Belgium, and Israel have means greater than the total mean (total mean=4.9); Switzerland, Denmark, and the Netherlands have means equal to the total mean; and Germany, Poland, and Norway have means less than the total mean. Change in confidence in food safety regulation is highest in Spain (mean=5.5) and lowest in Norway (mean=4.5). Norway, Switzerland, Denmark, Germany, and Poland differ significantly from Spain; respondents in Spain on average report relatively high change in confidence in the regulation of the food sector.

3.2 Discussion of descriptive findings

On average, respondents are confident in the regulation of their sector; means for confidence in data protection, finance, and food safety regulation are greater than four (4='Neither unconfident nor confident' on the scale from one to seven where '1' is 'Completely unconfident' and '7' is 'Completely confident'). Moreover, there has been a positive change in confidence in regulation. Respondents are, on average, more confident now in the regulation of their sector than they were five years ago; means for change in confidence in data protection, finance, and food safety regulation are greater than four (4='Neither less nor more confident' on the scale from one to seven where '1' is 'Much less confident' and '7' is 'Much more confident').

Tables 1, 2 and 3 seek to compare respondents' confidence and change in confidence in regulatory regimes. Specifically, the tables examine the means for each country. All countries have seen an increase in confidence in the regime (means > 4), so these tables merely show the countries in comparison with each other. It is important to note that if a country already has high reported levels of confidence in regulation, there may be less change in confidence in regulation.

There are four columns, as shown below: high confidence and high change in confidence, high confidence and low change in confidence, low confidence and high change in confidence, and, finally, low confidence and low change in confidence. The word 'high' is used for countries where the mean is greater than or equal to the total mean. Correspondingly, the word 'low' is used for countries where the mean is less than the total mean.

Table 1: Confidence and change in confidence – data protection

High confidence & high change in confidence	High confidence & low change in confidence	Low confidence & high change in confidence	Low confidence & low change in confidence
▪ Belgium ▪ Denmark ▪ Norway ▪ The Netherlands ▪ Spain	Germany	▪ Poland	▪ Israel ▪ Switzerland

Table 2: Confidence and change in confidence – finance

High confidence & high change in confidence	High confidence & low change in confidence	Low confidence & high change in confidence	Low confidence & low change in confidence
▪ Israel ▪ Norway ▪ Switzerland ▪ The Netherlands	▪ Denmark	▪ Belgium	▪ Germany ▪ Poland ▪ Spain

Table 3: Confidence and change in confidence – food safety

High confidence & high change in confidence	High confidence & low change in confidence	Low confidence & high change in confidence	Low confidence & low change in confidence
▪ Belgium ▪ Netherlands ▪ Denmark ▪ Switzerland	▪ Germany ▪ Norway	▪ Israel ▪ Spain	▪ Poland

Looking at the sectors in comparison reveals several interesting differences. First, the category in which countries fall differs based on the sector. Second, food safety, which has the highest overall regime confidence, has the most countries in the 'high confidence & low change in confidence' column. Third, Denmark, the Netherlands, and Norway consistently have 'high confidence'; Germany, Belgium, Switzerland,

Spain, and Israel either have 'high' or 'low' confidence depending on the sector; and Poland consistently has 'low' confidence.

3.3 What determines confidence in the regulatory regime?

What factors influence how confident respondents believe citizens can be in the regulation of their sector? The explanatory analyses, conducted using ordered logistic regression (see section 1.3 for more details), demonstrate that a number of factors independently influence how confident respondents state that citizens can be in the regulation of their sector.

Respondents with the following features are **more likely** to state that citizens can be confident in the regulation of their sector:

- Respondents who hold a leadership role in their organisation;
- Respondents with more generalized trust in people;
- Respondents who reside in Belgium, Denmark, Germany, Israel, the Netherlands, Norway, Spain, and Switzerland (compared to respondents who reside in Poland – Poland is the reference category);
- Respondents in the finance and food sectors (compared to data protection – data protection is the reference category).

However, respondents with the following features are **less likely** to state that citizens can be confident in the regulation of their sector:

- Respondents who have a more positive attitude towards stricter government regulation.

The type of organisation at which respondents work as well as their age, gender, and education level do not significantly affect their responses. Specifically, when we control for other factors, there is no significant difference in how respondents working at regulated organisations (regulatees), interest groups, and organisations classified as 'regulatory intermediaries' responded to the question compared with respondents working at organisations classified as 'public actors'[1].

We also performed similar analyses to determine what factors influence whether respondents believe that citizens now can be less or more confident in the regulation of their sector than they were five years ago. Respondents who reside in the Netherlands and Spain (compared to respondents from Poland – reference category) are **more likely** to state that citizens can be confident in the regulation of their sector, compared to five years ago. Respondents in the food sector (compared with data protection – reference category) are **less likely** to state that citizens can be confident in the regulation of their sector compared to five years ago. No other factors played a role in explaining change in confidence.

[1] The term 'public actors' includes respondents from parliamentary commissions, regulatory agencies, executive bodies and non-judiciary arbitration bodies (see section 1.3).

4. Regime Performance: Compliance, Consent, and Legitimacy

The TiGRE project stresses the importance of trust for well-functioning cooperation in multi-level regulatory regimes. The absence of trust-based cooperation can lead to under- or overregulation, to perceptions of inconsistent or conflicting decision making, to accumulating regulatory burdens, as well as unfair treatment and unequal access to markets and public services. Ultimately, this results in a loss of consent with, compliance to, and legitimacy of the regulatory regimes in the eyes of regulatees and other regime actors, as well as citizens. The TiGRE survey examines the concepts of regulatory consent, compliance, and legitimacy. This section presents the data from the questions on compliance, consent, and legitimacy asked in the survey questionnaire.

4.1 Compliance

This section specifically examines data on regulatory compliance, i.e. the respondents' perception of regulatees' compliance with existing rules and regulations in a specific sector. Each respondent received two survey questions, which ask about the compliance of two types of regulatees in their sector:

Q: Regulatory Compliance

- Overall, to what extent do you think that [hospitals/internet providers] comply with data protection regulations in [country]?
- Overall, to what extent do you think that [licensed banks/electronic payment companies] comply with financial sector regulations in [country]?
- Overall, to what extent do you think that companies working with [poultry and eggs/fruit and vegetables] comply with food safety regulations in [country]?

Scale: 0-10, (0) Do not comply at all, (10) Fully comply

4.1.1 Exploring the data

This section presents the percentage of answers per answer category and the means for the questions described above in section 4.1 on regulatory compliance.

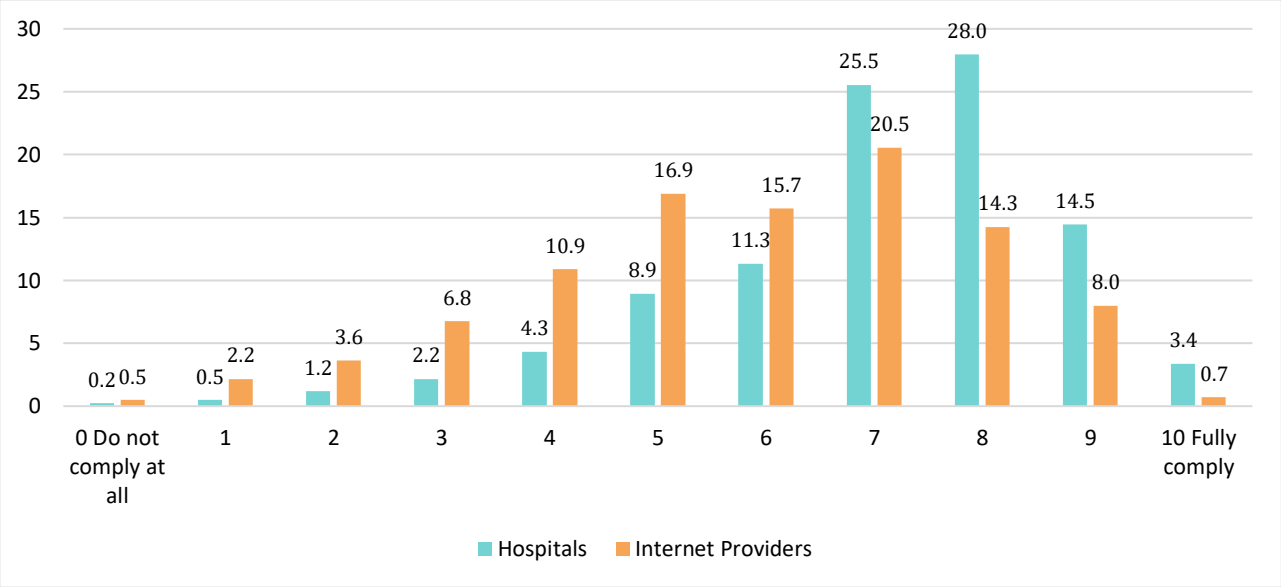

Figure 19: Regulatory compliance – data protection (%, N=414-415)

Respondents working with **data protection** were asked two questions. The first question stated, "Overall, to what extent do you think that hospitals comply with data protection regulations in [country]?" The second question stated, "Overall, to what extent do you think that internet providers comply with data protection regulations in [country]?" They were asked to answer on a scale from zero to ten, where '0' was 'Do not comply at all' and '10' was 'Fully comply'. Figure 19 depicts the percent of answers per answer category for the abovementioned questions.

There are noticeable differences in the answers concerning different regulatees. Approximately 82.7% of the respondents answer that **hospitals** comply - to some degree - with data protection regulations (answer categories 6 through 10), whereas approximately 8.4% of the respondents answer that hospitals do not comply to some degree (answer categories 0 through 4) with data protection regulations. Approximately 8.9% of respondents chose the middle category (5). The pattern is slightly different with respect to **internet providers**. Approximately 59.2% of the respondents answer that internet providers comply - to some degree - with data protection regulations (answer categories 6 through 10), whereas approximately 24% of the respondents answer that internet providers do not comply to some degree (answer categories 0 through 4) with data protection regulations. Approximately 16.9% of respondents chose the middle category (5).

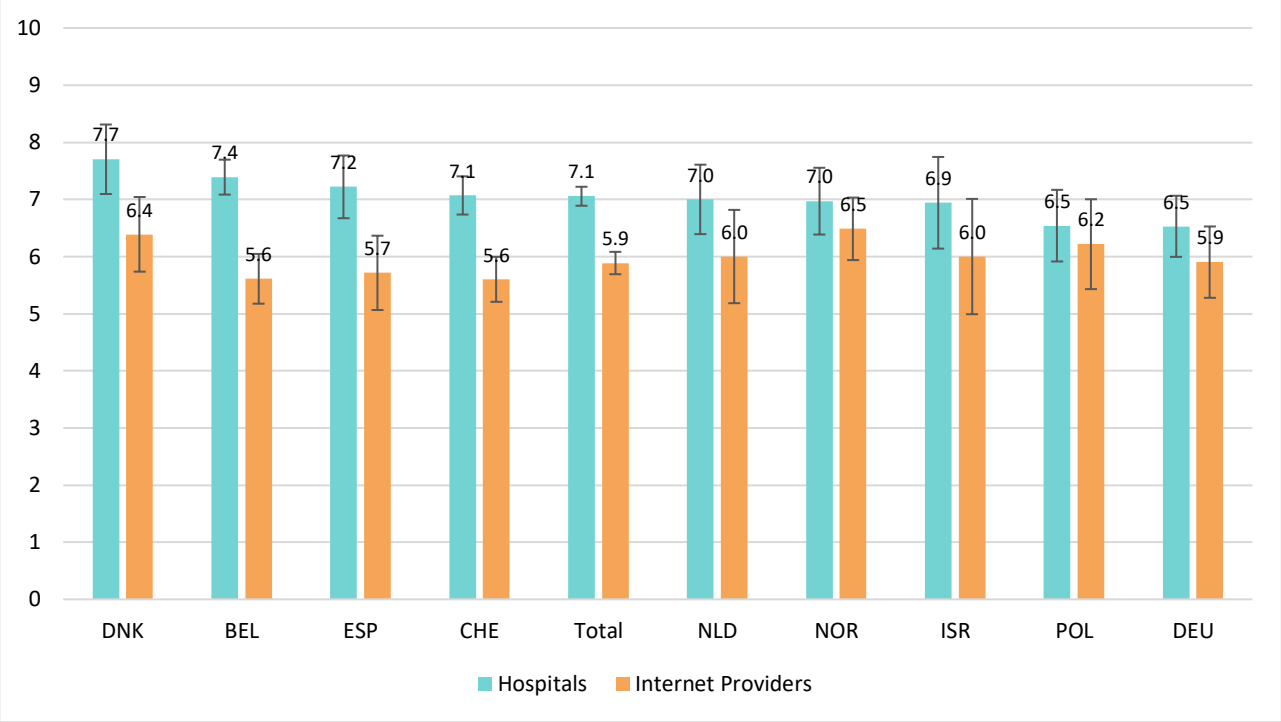

Figure 20: Regulatory compliance – data protection (means, N=414-415)

Figure 20 depicts the means for respondents' perceptions of **hospitals' and internet providers'** compliance with data protection regulation by country. The observations are ordered from the highest mean to the lowest mean by the variable, 'Hospitals'. Higher means indicate higher levels of perceived compliance.

Regarding respondents' perceptions of **hospitals'** compliance with data protection regulation, Denmark Belgium, and Spain, have means greater than the total mean (total mean=7.1); Switzerland has a mean equal to the total mean; and the Netherlands, Norway, Israel, Germany, and Poland have means less than the total mean. The mean is highest in Demark (mean=7.7) and lowest in Poland and Germany (means=6.5). However, there are no significant differences between countries.

Regarding respondents' perceptions of **internet providers'** compliance with data protection regulation, Norway, Denmark, Poland, the Netherlands, and Israel have means greater than the total mean (total mean=5.9); Germany has a mean equal to the total mean; and Spain, Belgium, and Switzerland have a mean

less than the total mean. The mean is highest in Norway (mean=6.5) and lowest in Belgium and Switzerland (means=5.6). However, there are no significant differences between countries.

In all countries, respondents perceive hospitals as more compliant than internet providers. The total mean for hospitals is 7.1 whereas for internet providers it is 5.9. However, as means are greater than five for both hospitals and internet providers, five being the middle category on the scale from '0 Do not comply at all' to '10 Fully comply', respondents on average believe that both hospitals and internet providers comply with data protection regulations.

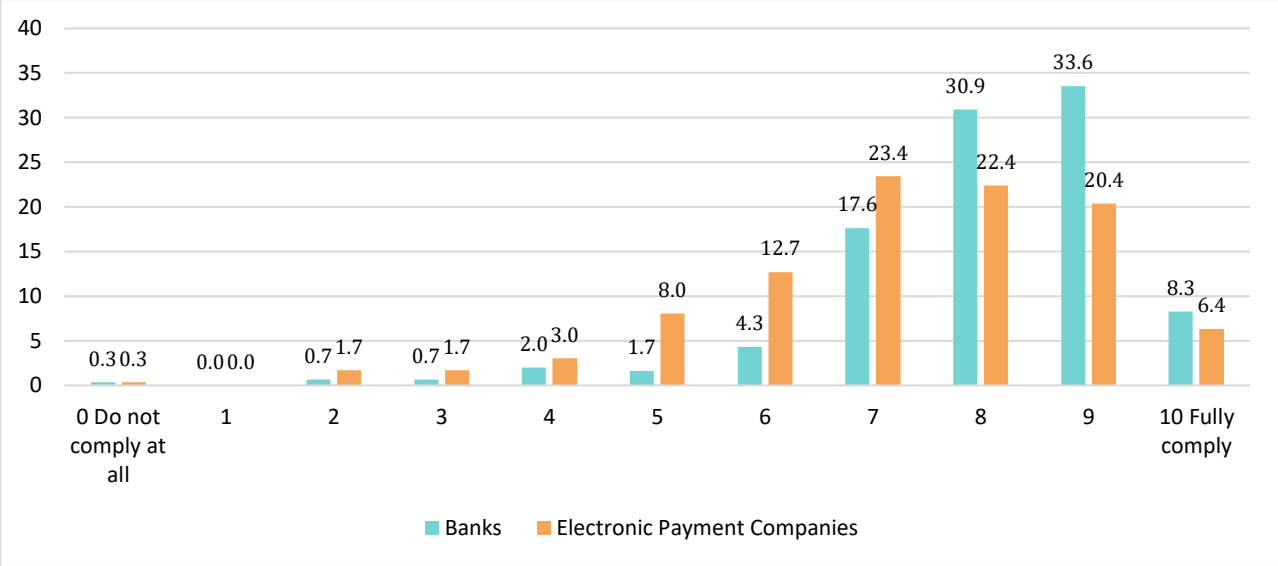

Figure 21: Regulatory compliance – finance (%, N=299-301)

Respondents working with **finance** were asked two questions about regulatory compliance. The first question stated, "Overall, to what extent do you think that licensed banks comply with financial sector regulations in [country]?" The second question stated, "Overall, to what extent do you think that electronic payment companies comply with financial sector regulations in [country]?" They were asked to answer on a scale from zero to ten, where '0' was 'Do not comply at all' and '10' was 'Fully comply'. Figure 21 depicts the percent of answers per answer category.

There are noticeable differences in the answers concerning different regulatees. Approximately 94.7% of the respondents answer that **banks** comply - to some degree - with financial sector regulations (answer categories 6 through 10), whereas approximately 3.7% of the respondents answer that banks do not comply to some degree (answer categories 0 through 4) with financial sector regulations. Approximately 1.7% of respondents chose the middle category (5). The pattern is slightly different with respect to **electronic payment companies**. Approximately 85.3% of the respondents answer that electronic payment companies comply - to some degree - with financial sector regulations (answer categories 6 through 10), whereas approximately 6.7% of the respondents answer that electronic payment companies do not comply to some degree (answer categories 0 through 4) with financial sector regulations. Approximately 8% of respondents chose the middle category (5).

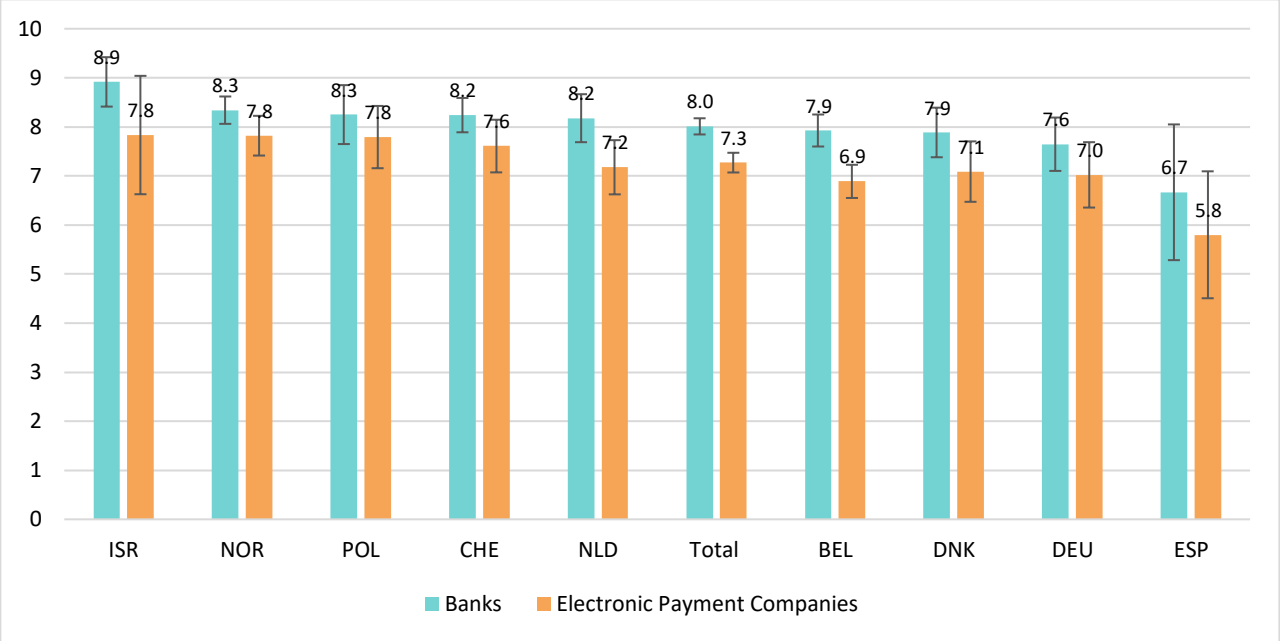

Figure 22: Regulatory compliance – finance (means, N=299-301)

Figure 22 depicts the means for respondents' perceptions of **banks'** and **electronic payment companies'** compliance with financial regulation by country. Respondents answered on a scale from zero to ten, where '0' was 'Do not comply at all' and '10' was 'Fully comply'. The observations are ordered from the highest mean to the lowest mean by the variable, 'Banks'. Higher means indicate higher perceived compliance.

With regard to **banks'** compliance with financial sector regulation, Israel, Norway, Poland, Switzerland, and the Netherlands have means greater than the total mean (total mean=8.0), and Belgium, Denmark, Germany and Spain have means less than the total mean. The mean is highest in Israel (mean=8.9) and lowest in Spain (mean=6.7). Israel differs significantly from Spain; respondents in Spain perceive banks' compliance with financial regulation as relatively low.

With regard to **electronic payment companies**, Israel, Norway, Poland, and Switzerland have means greater than the total mean (total mean=7.3), and the Netherlands, Denmark, Germany, Belgium, and Spain have means less than the total mean. The mean is highest in Israel, Norway, and Poland (means=7.8) and lowest in Spain (mean=5.8). Norway and Poland differ significantly from Spain; respondents in Spain perceive electronic payment companies' compliance with financial sector regulation as relatively low.

In all countries, respondents perceive banks as more compliant with financial sector regulations than electronic payment companies. The total mean for banks is 8.0, whereas the total mean for electronic payment companies is 7.3. However, as means are greater than five for both banks and electronic payment companies, five being the middle category on the scale from '0 Do not comply at all' to '10 Fully comply', respondents on average believe that both banks and electronic payment companies comply with financial sector regulations.

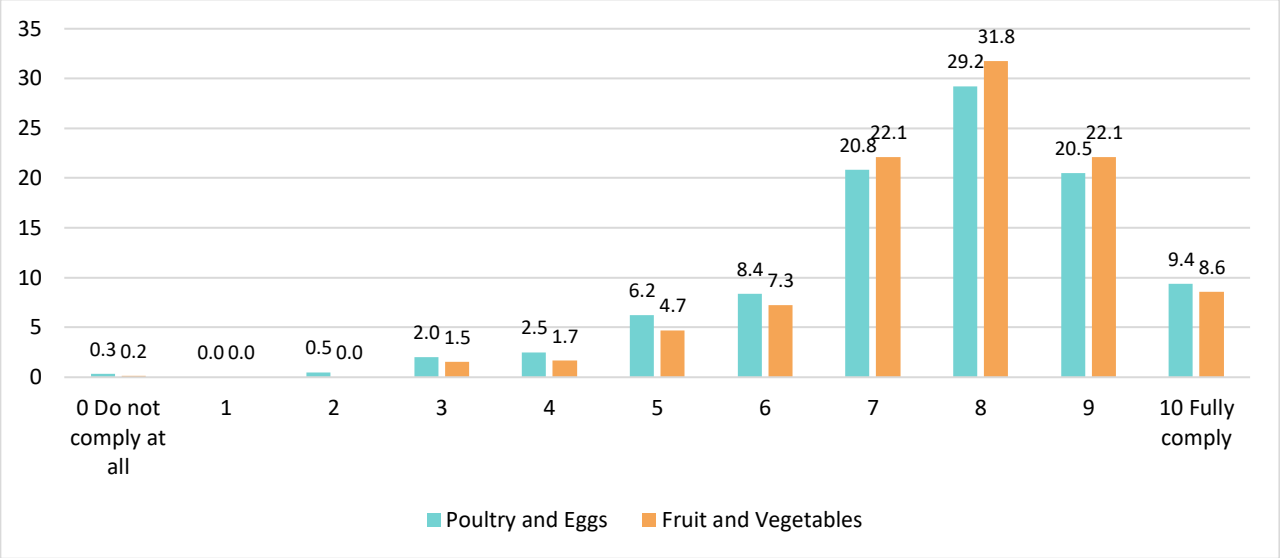

Figure 23: Regulatory compliance – food safety (%, N=592-595)

Respondents working with **food safety** were asked two questions regarding regulatory compliance. The first question stated, "Overall, to what extent do you think that companies working with poultry and eggs comply with food safety regulations in [country]?" The second question stated, "Overall, to what extent do you think that companies working with fruit and vegetables comply with food safety regulations in [country]?" They were asked to answer on a scale from zero to ten, where '0' was 'Do not comply at all' and '10' was 'Fully comply'. Figure 23 depicts the percent of answers per answer category for the abovementioned questions.

There are noticeable differences in the answers concerning different regulatees. Approximately 88.3% of the respondents answer that **companies working with poultry and eggs** comply - to some degree - with food safety regulations (answer categories 6 through 10), whereas approximately 5.3% of the respondents answer that companies working with poultry and eggs do not comply to some degree (answer categories 0 through 4) with food safety regulations. Approximately 6.2% of respondents chose the middle category (5). The pattern is slightly different with respect to **companies working with fruit and vegetables**. Approximately 91.9% of the respondents answer that companies working with fruit and vegetables comply - to some degree - with food safety regulations (answer categories 6 through 10), whereas approximately 3.4% of the respondents answer that companies working with fruit and vegetables do not comply to some degree (answer categories 0 through 4) with food safety regulations. Approximately 4.7% of respondents chose the middle category (5).

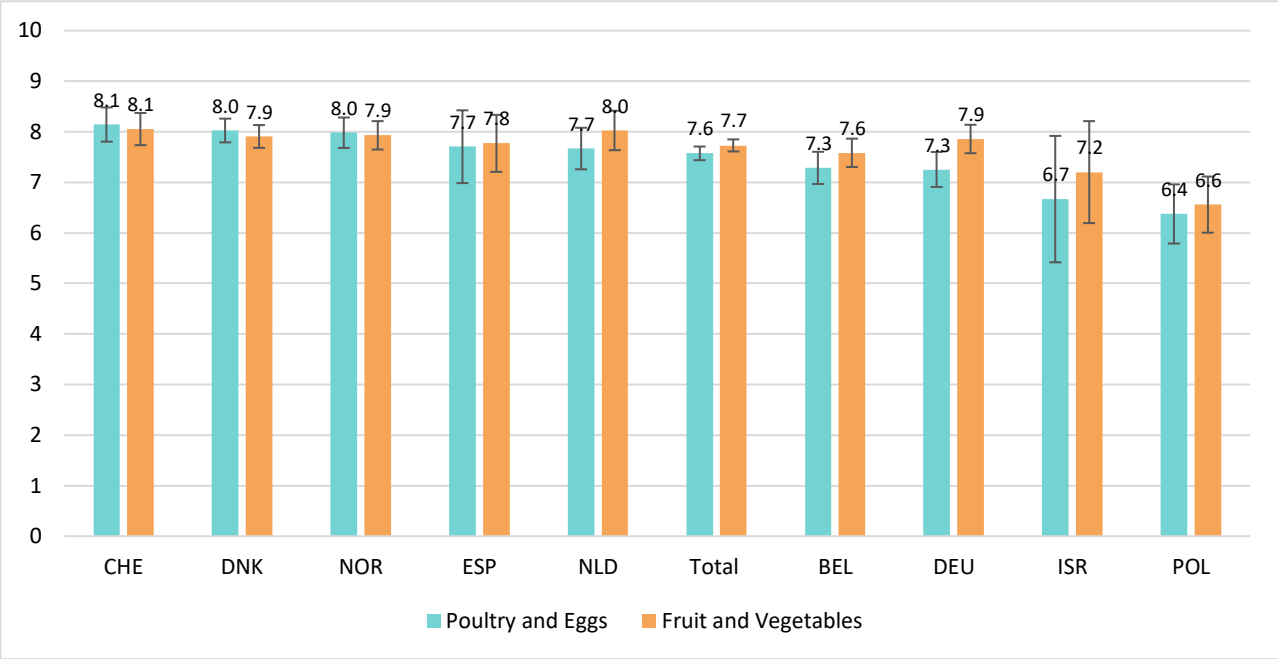

Figure 24: Regulatory compliance – food safety (means, N=592-595)

Figure 24 depicts the means for respondents' perceptions of **companies' working with poultry and eggs and companies' working with fruit and vegetables** compliance with food safety regulation. The observations are ordered from the highest mean to the lowest mean by the variable, 'Poultry and Eggs'. Higher means indicate higher perceived compliance with food safety regulation.

With regard to **companies working with poultry and eggs**, Switzerland, Denmark, Norway, Spain, and the Netherlands have means greater than the total mean (total mean=7.6), and Belgium, Germany, Israel, and Poland means less than the total mean. The mean is highest in Switzerland (mean=8.1) and lowest in Poland (mean=6.4). Switzerland, Denmark, Norway, and the Netherlands differ significantly from Poland; respondents in Poland perceive companies' working with poultry and eggs compliance with food safety regulation as relatively low. Moreover, Switzerland and Denmark differ significantly from Belgium and Germany, where perceived compliance is also relatively low.

With regard to **companies working with fruit and vegetables**, Switzerland, the Netherlands, Denmark, Norway, Germany, and Spain have means greater than the total mean (total mean=7.7), and Belgium, Israel, and Poland means less than the total mean. The mean is highest in Switzerland (mean=8.1) and lowest in Poland (mean=6.6). Switzerland, Denmark, Norway, Spain, the Netherlands, Belgium, and Germany differ significantly from Poland; respondents in Poland perceive companies' working with fruit and vegetables compliance with food safety regulation as relatively low.

In Switzerland, Denmark, Norway, and Spain there is little (one decimal point) or no difference between the perceived compliance of companies working with poultry and eggs and those working with fruit and vegetables. In all other countries – the Netherlands, Belgium, Germany, Israel, and Poland – companies working with fruit and vegetables are perceived as slightly more compliant with food safety regulations than those working with poultry and eggs. As means are greater than five for both companies working with poultry and eggs and those working with fruit and vegetables, five being the middle category on the scale from '0 Do not comply at all' to '10 Fully comply', respondents on average believe that both companies working with poultry and eggs and those working with fruit and vegetables comply with food safety regulations.

4.1.2 Discussion of descriptive findings

There are several differences between the sectors and subsectors, as depicted above. First, there is a higher degree of perceived compliance with regulation in the food and financial sectors than there is in data protection. Second, there is variation between the subsectors. Respondents working with data protection on average perceive hospitals (total mean=7.1) to be more compliant with data protection regulations than internet providers (total mean=5.9). Similarly, respondents working with finance on average perceive licensed banks (total mean=8.0) to be more compliant with financial sector regulations than electronic payment companies (total mean=7.3). Respondents working in the food sector, however, see little difference between the regulatory compliance of companies working poultry and eggs (total mean=7.6) and companies working with fruit and vegetables (total mean=7.7). These sub-sector differences are intriguing, especially the large difference between the total mean for hospitals (total mean=7.1) and the total mean for internet providers (5.9).

4.1.3 What determines perceptions of compliance in the regulatory regime?

What factors influence respondents' perceptions of organisations' compliance with regulation? The explanatory analyses conducted using OLS (see section 1.3 for more details) show a number of factors to independently influence respondents' perceptions of regulated organisations' compliance with the regulatory regime[1].

Respondents with the following features are **more likely** to perceive regulated organisations' compliance with the regulatory regime as higher:

- Respondents who have more generalized trust in people;
- Respondents working at regulated organisations and interest groups (compared to respondents working at organisations classified as 'public actors' – reference category)[2];
- Respondents residing in Denmark, the Netherlands, Norway, and Switzerland (compared to Poland – reference category).

Respondents with the following features are **less likely** to perceive regulated organisations' compliance with the regulatory regime as higher:

- Respondents who have a more positive attitude towards stricter government regulation;
- Respondents who are female (as opposed to respondents who are male);

[1] As each respondent was asked about the perceived compliance of two kinds of regulated organisations in the sector in which the respondent was active, we first performed factor analyses per sector to see whether the compliance items loaded on the same factor. That was the case in each of the three sectors. A new variable was created for each sector, being the average of both compliance items for that sector. Subsequently the data for these three variables were merged and analysed as a measure of compliance.

[2] The term 'public actors' includes respondents from parliamentary commissions, regulatory agencies, executive bodies and non-judiciary arbitration bodies.

4.2 Consent

This section examines regulatory consent in terms of both content and enforcement. More specifically, the survey questions tap into respondents' perception of the substance of existing regulation and its enforcement by regulatory authorities. Respondents were asked the following questions based on their sector[1]:

Q1: Regulatory Consent (Content)

- In your opinion, is data protection regulation in [country] – in terms of its content – too strict or too loose?
- In your opinion, is financial sector regulation in [country] – in terms of its content – too strict or too loose?
- In your opinion, is food safety regulation in [country] – in terms of its content – too strict or too loose?

Q2: Regulatory Consent (Enforcement)

- In your opinion, is the way that data protection regulation is enforced in [country] too strict or too loose?
- In your opinion, is the way that financial sector regulation is enforced in [country] too strict or too loose?
- In your opinion, is the way that food safety regulation is enforced in [country] too strict or too loose?

Scale: (1) Way too strict, (2) Too strict, (3) Slightly too strict, (4) Just fine as it is, (5) Slightly too loose, (6) Too loose, (7) Way too loose

On the graphs presenting means, the scale has been adjusted from '1' to '7' to '-3' to '3'. This is in order to most accurately depict the data. In the graphs with the adjusted scale, the answer category 'just fine as it is' equals '0' (the horizontal axis). The scale was adjusted because logically the answer category 'just fine as it is' should equal '0' – the existing policies/their enforcement is just fine as it is and no change is required from the respondent's point of view.

[1] Respondents only received questions that related to their sector.

4.2.1 Exploring the data

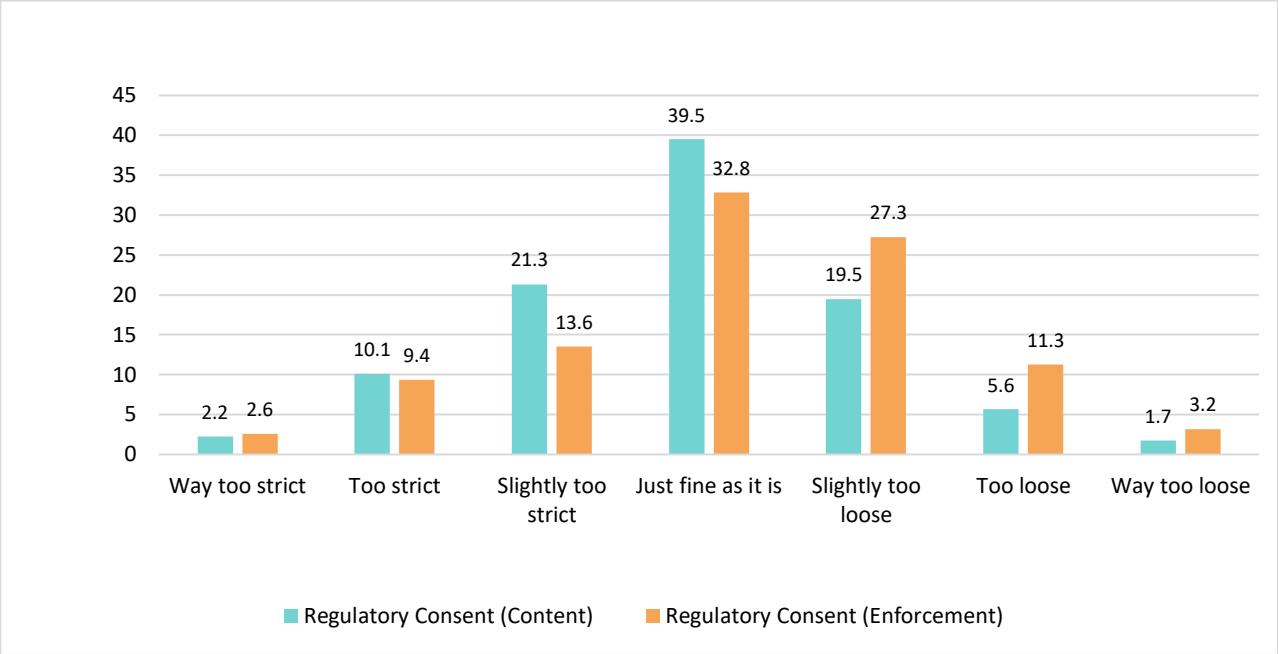

Figure 25: Regulatory consent in terms of content and enforcement (%, N=1,218-1,223)

As mentioned above, the respondents were asked two questions about regulatory consent. One question looks specifically at respondents' **consent with regulatory content** and one question looks specifically at respondents' **consent with regulatory enforcement**. Respondents were asked to answer on a scale from 'Way too strict' to 'Way too loose'. Figure 25 depicts the percent of answers per answer category for the questions on regulatory consent, both content and enforcement.

There are noticeable differences in the answers concerning consent with regulatory content and regulatory enforcement. Approximately 26.8% of the respondents answer that **regulatory content** is, to some degree, too loose (answer categories 5 through 7), whereas approximately 33.6% of the respondents answer that regulatory content is, to some degree, too strict (answer categories 1 through 3). Approximately 39.5% of respondents answer that regulatory content is just fine as it is (answer category 4). The pattern is slightly different with respect to **regulatory enforcement**. Approximately 41.8% of the respondents answer that regulatory enforcement is, to some degree, too loose (answer categories 5 through 7), whereas approximately 25.6% of the respondents answer that regulatory enforcement is, to some degree, too strict (answer categories 1 through 3). Approximately 32.8% of the respondents answer that regulatory enforcement is just fine as it is (answer category 4).

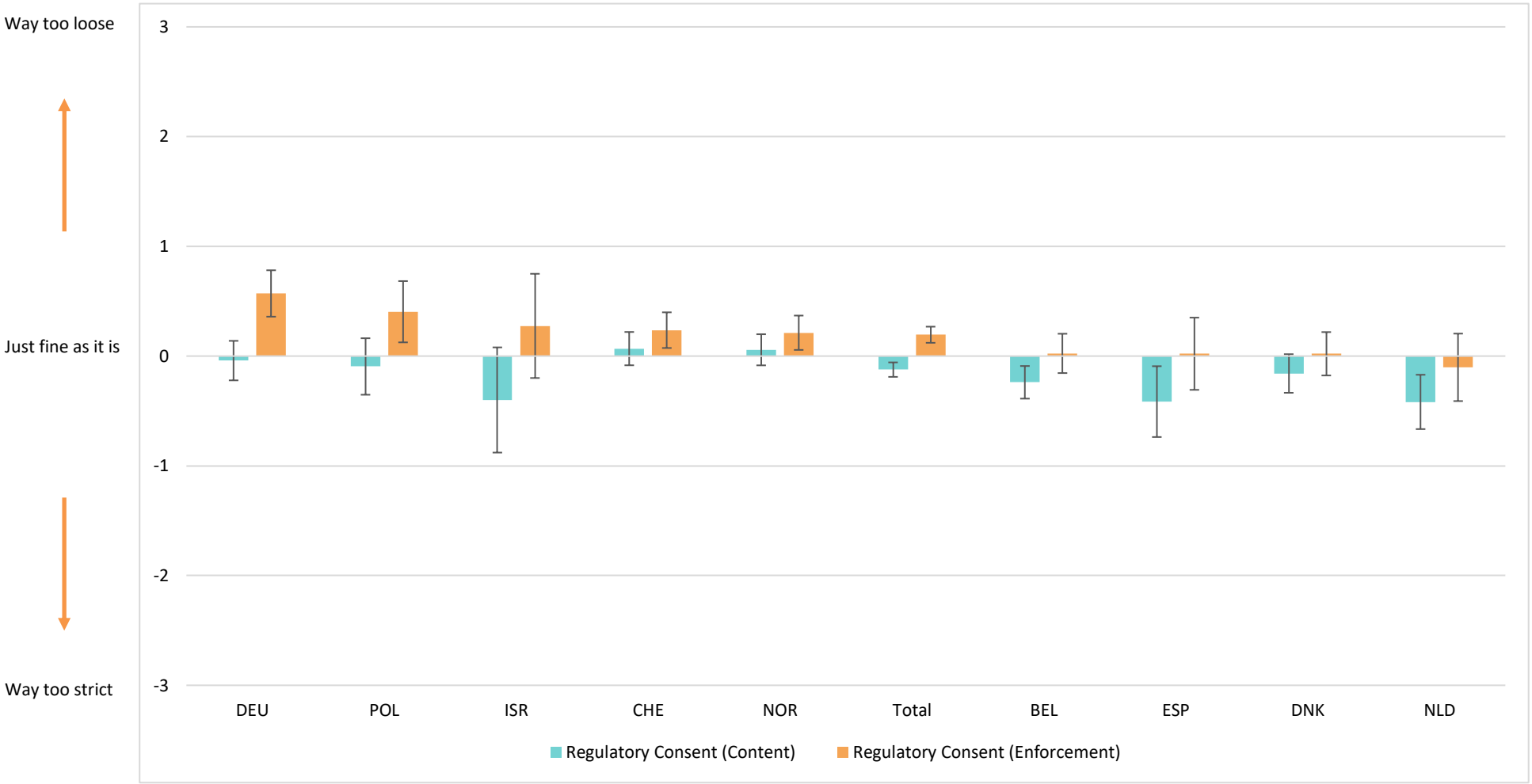

Figure 26: Regulatory consent with respect to content and enforcement across countries (adjusted means, N=1218-1223)

Figure 26 depicts the adjusted means for respondents' consent with the content and enforcement of data protection, financial sector, and food safety regulation. The data is broken down by country, and the observations are ordered from the highest mean to the lowest mean by the variable, 'Regulatory Consent (Enforcement)'. Means at zero indicate that respondents perceive the content or enforcement of regulation as just fine as it is. Means on the negative side of the scale indicate that respondents perceive the content or enforcement of regulation as too strict (to some degree), whereas means on the positive side of the scale indicate that respondents perceive the content or enforcement of regulation as too loose (to some degree).

Respondents on average perceive the content of regulation to be slightly too strict (total adjusted mean= -0.1). Specifically, taking into account the confidence intervals (i.e. considering whether they cross the horizontal axis), respondents in Belgium, Spain, and the Netherlands on average perceive the content of regulation to be slightly too strict (to varying degrees). Respondents in all other countries (Denmark, Germany, Israel, Norway, Poland, and Switzerland) on average perceive the content of regulation to be just fine as it is. Respondents in Norway and Switzerland stand out as significantly different from respondents in the Netherlands. Respondents in Norway and Switzerland perceive the content of regulation to be just fine as it is whereas respondents in the Netherlands on average find the content of regulation to be relatively strict.

Respondents on average perceive the enforcement of regulation to be slightly too loose (total adjusted mean=0.2). Taking into account the confidence intervals, respondents in Germany, Norway, Poland, and Switzerland on average perceive the enforcement of regulation to be slightly too loose (to varying degrees), whereas respondents in Belgium, Denmark, Israel, the Netherlands, and Spain perceive the enforcement of regulation to be just fine as it is. Germany stands out as significantly different from Belgium, Denmark, and the Netherlands. Respondents in Germany perceive the enforcement of regulation to be relatively loose whereas respondents in Belgium, Denmark, and the Netherlands on average find the enforcement of regulation to be just fine as it is.

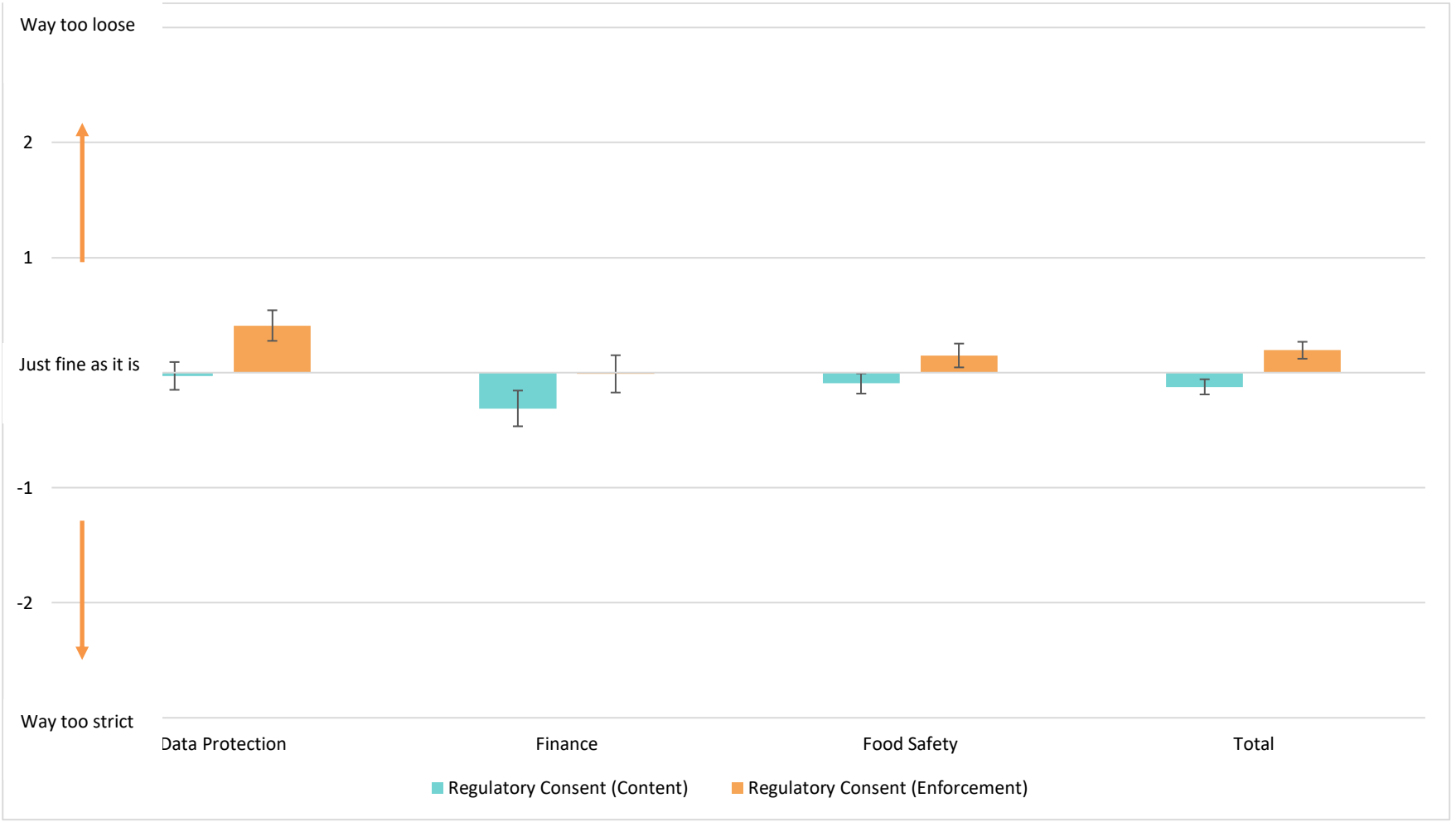

Figure 27: Regulatory consent with respect to content and enforcement across sectors (adjusted means, N=1,218-1,223)

Figure 27 depicts the adjusted means for respondents' consent with the content and enforcement of data protection, financial sector, and food safety regulation. The data is broken down by sector. The observations are ordered from the highest mean to the lowest mean by the variable 'Regulatory Consent (Enforcement)'. Means at zero indicate that respondents perceive the content or enforcement of regulation as just fine as it is. Means on the negative side of the scale indicate that respondents perceive the content or enforcement of regulation as too strict (to some degree) whereas means on the positive side of the scale indicate that respondents perceive the content or enforcement of regulation as too loose (to some degree).

As mentioned previously, overall respondents on average perceive the content of regulation to be slightly too strict (total adjusted mean=-0.1). Specifically, taking into account the confidence intervals, respondents in financial and food sectors on average perceive the content of regulation to be slightly too strict (to varying degrees) whereas respondents working with data protection on average perceive the content of regulation to be just fine as it is. However, there are no significant differences between the sectors.

As mentioned previously, respondents on average perceive the enforcement of regulation to be too loose (total adjusted mean=0.2). Specifically, taking into account the confidence intervals, respondents working with data protection and respondents in the food sector on average perceive the enforcement of regulation to be slightly too loose (to varying degrees). Respondents in the financial sector, however, on average perceive the enforcement of regulation to be just fine as it is. Data protection stands out as significantly different from the financial sector. Respondents working with data protection perceive the enforcement of regulation to be relatively loose whereas respondents in the financial sector find the enforcement of regulation to be just fine as it is.

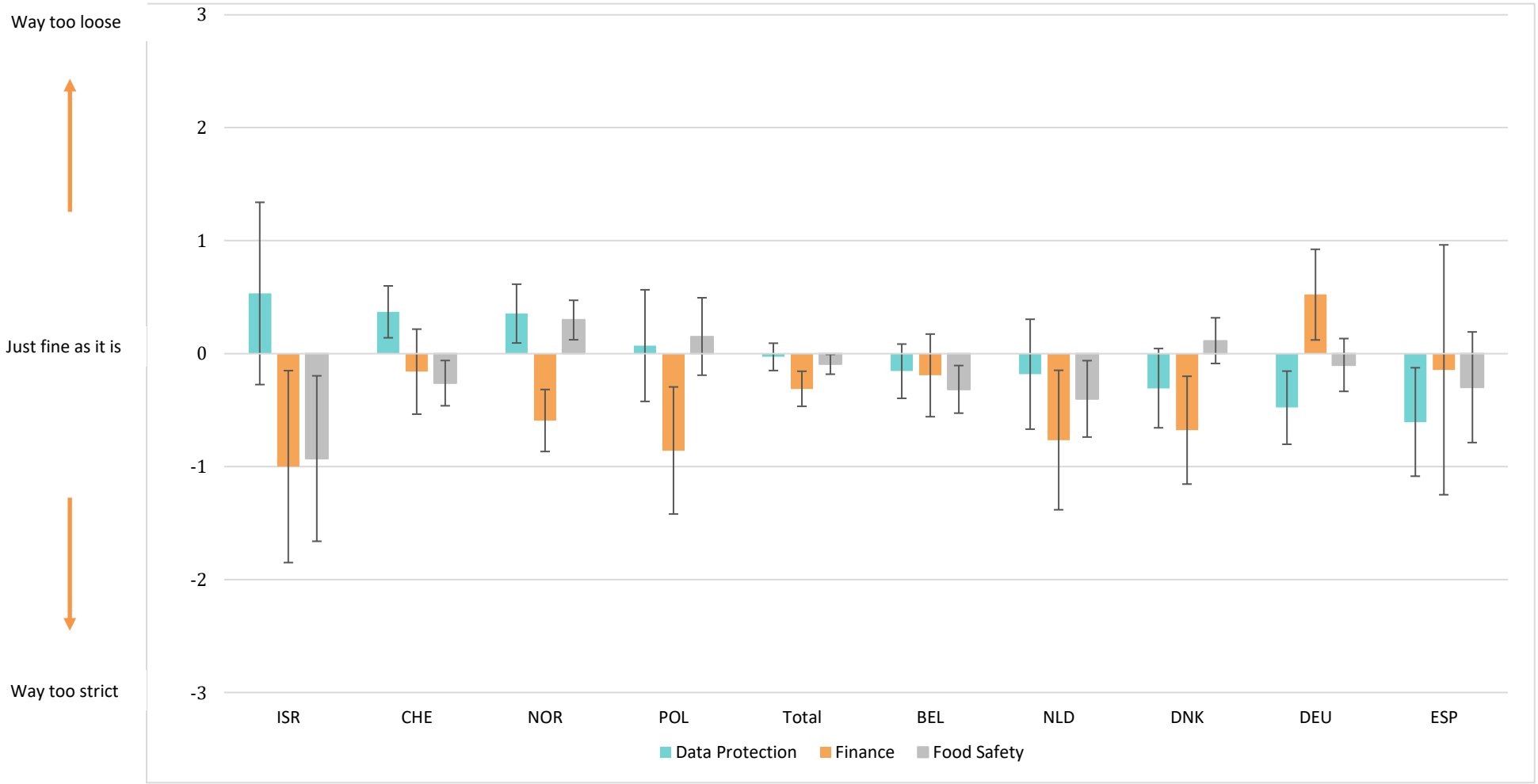

Figure 28: Regulatory consent (content) across sectors and countries (adjusted means, N=283-553)

Figure 28 depicts the adjusted means for respondents' **consent with the content of data protection, financial sector, and food safety regulation**. The data is broken down by country and by sector, and the observations are ordered from the highest mean to the lowest mean by the variable, 'Data protection'. Means at zero indicate that respondents perceive the content of regulation as just fine as it is. Means on the negative side of the scale indicate that respondents perceive the content of regulation as too strict (to some degree) whereas means on the positive side of the scale indicate that respondents perceive the content of regulation as too loose (to some degree).

Respondents on average perceive the content of **data protection** regulation to be just fine as it is (total adjusted mean=0). Specifically, taking into account the confidence intervals, respondents in Germany and Spain on average perceive the content of data protection regulation to be slightly too strict (to varying degrees). Respondents in Belgium, Denmark, Israel, the Netherlands, and Poland on average perceive the content of data protection regulation to be just fine as it is. Finally, respondents in Norway and Switzerland on average find the content of data protection regulation to be slightly too loose (to varying degrees). Norway and Switzerland stand out as significantly different from the Germany and Spain.

Respondents on average perceive the content of **financial sector** regulation to be slightly too strict (total adjusted mean=-0.3). Specifically, taking into account the confidence intervals, respondents in Denmark, Israel, the Netherlands, Norway, and Poland on average perceive the content of financial sector regulation to be too strict (to varying degrees). Respondents in Belgium, Spain, and Switzerland on average perceive the content of financial sector regulation to be just fine as it is. Finally, respondents in Germany on average find the content of financial sector regulation to be too loose. Germany stands out as significantly different from Denmark, Israel, the Netherlands, Norway, and Poland.

Respondents on average perceive the content of **food safety** regulation to be slightly too strict (total adjusted mean=-0.1). Specifically, taking into account the confidence intervals, respondents in Belgium, Israel, Switzerland, and the Netherlands on average perceive the content of food safety regulation to be too strict (to varying degrees). Respondents in Denmark, Germany, Poland, and Spain on average perceive the content of food safety regulation to be just fine as it is. Finally, respondents in Norway on average find the content of food safety regulation to be slightly too loose. Norway stands out as significantly different from Belgium, Israel, the Netherlands, and Switzerland. Denmark also stands out as significantly different from Israel.

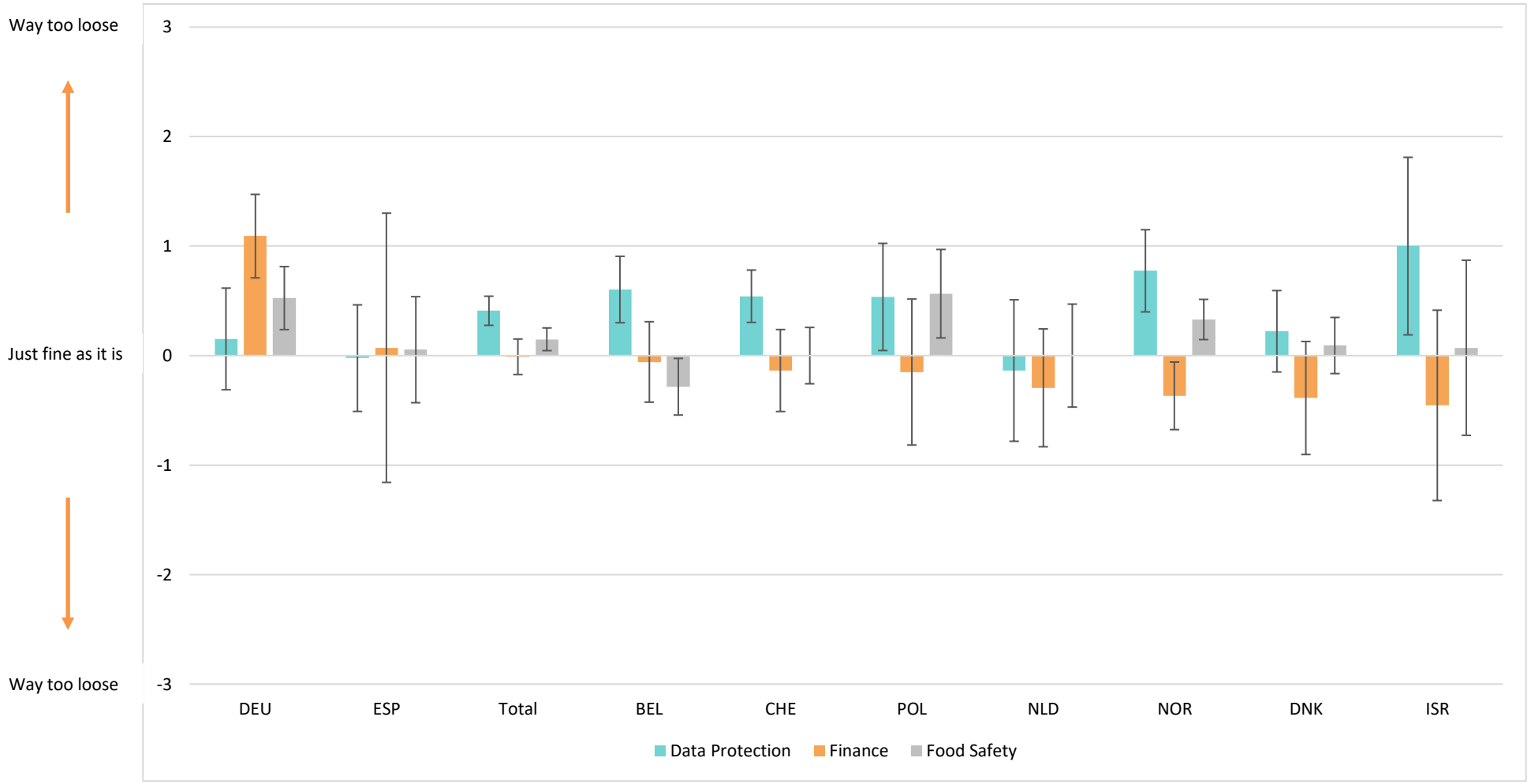

Figure 29: Regulatory consent (enforcement) across sectors and countries (adjusted means, N=282-550)

Figure 29 depicts the adjusted means for respondents' **consent with the enforcement of data protection, financial sector, and food safety regulation**. The data is broken down by sector and by country, and the observations are ordered from the highest mean to the lowest mean by the variable, 'Finance'.

Means at zero indicate that respondents perceive the enforcement of regulation as just fine as it is. Means on the negative side of the scale indicate that respondents perceive the enforcement of regulation as too strict (to some degree) whereas means on the positive side of the scale indicate that respondents perceive the enforcement of regulation as too loose (to some degree).

Respondents on average perceive the enforcement of **data protection** regulation to be slightly too loose (total adjusted mean=0.4). Specifically, taking into account the confidence intervals, respondents in Belgium, Israel, Norway, Poland, and Switzerland on average perceive the enforcement of data protection regulation to be too loose (to varying degrees) whereas respondents in Denmark, Germany, the Netherlands, and Spain on average perceive the enforcement of data protection regulation to be just fine as it is. However, there are no significant differences between countries.

Respondents on average perceive the enforcement of **financial sector** regulation to be just fine as it is (total adjusted mean=0). Specifically, respondents in Belgium, Denmark, Israel, the Netherlands, Poland, Spain, and Switzerland on average perceive the enforcement of financial sector regulation to be just fine as it is. Respondents in Norway on average perceive the enforcement of financial sector regulation to be slightly too strict. Finally, respondents in Germany on average perceive the enforcement of financial sector regulation to be too loose (to some degree). Germany stands out as significantly different from Belgium, Denmark, Israel, the Netherlands, Norway, Poland, and Switzerland.

Respondents on average perceive the enforcement of **food safety** regulation to be slightly too loose (total adjusted mean=0.1). Specifically, taking into account the confidence intervals, respondents in Germany, Norway, and Poland on average perceive the enforcement of food safety regulation to be slightly too loose (to varying degrees). Respondents in Denmark, Israel, the Netherlands, Spain, and Switzerland on average perceive the enforcement of food safety regulation to be just fine as it is. Finally, respondents in Belgium on average perceive the enforcement of food safety regulation to be slightly too strict. Belgium stands out as significantly different from Germany, Norway, and Poland.

4.2.2 Discussion of descriptive findings

Overall, on average respondents in all three sectors and in all nine countries perceive the content of regulation to be too strict (to varying degrees) and the enforcement of regulation to be too loose (to varying degrees).[1] This presents a possible paradox insofar as both questions tap into present levels of regulatory content and enforcement, respectively. Arguably, if regulations are considered too strict, shouldn't respondents welcome a too loose enforcement of those regulations? This is obviously an interesting observation to be followed up on in the TiGRE project.

There is one significant difference when we examine the data by sector. Data protection stands out as significantly different from the financial sector. Respondents working with data protection perceive the enforcement of regulation to be relatively loose whereas respondents in the financial sector find the enforcement of regulation to be just fine as it is. This is an interesting finding, especially in light of the relatively new introduction of GDPR, which significantly strengthened data protection regulation in Europe.

There is no consistent pattern between sectors and countries with regards to consent with regulatory content and enforcement (see Figure 31 and Figure 32). For instance, respondents in Germany on average perceive the content of data protection regulations as too strict, but the enforcement of regulation as just fine as it is. With regards to the financial sector, German respondents on average perceive both the content and enforcement of financial sector regulation as too loose. Finally, with regards to the food sector, they perceive the content of food safety regulations as just fine as they are, but the enforcement of these regulations too loose. In short, this illustrative example suggests that there is no country pattern when we compare respondents' perceptions of both regulatory content and enforcement.

[1] The adjusted total mean for regulatory content is -0.1 and the adjusted total mean for regulatory enforcement is 0.2.

4.2.3 What determines perceptions of consent in the regulatory regime?

What factors influence whether respondents perceive the **content** of regulations to be too strict or too loose? The explanatory analyses, conducted using ordered logistic regression (see section 1.3 for more details), show a number of factors to independently influence whether a respondent perceives regulations to be too loose in terms of their content.

Respondents with the following features are **more likely** to perceive the content of regulation to be too loose:

- Respondents who have a more positive attitude towards stricter government regulation.

Respondents with the following features are **less likely** to perceive the content of regulation to be too loose:

- Respondents who are older;
- Respondents who have been employed at their current organisation for a longer amount of time;
- Respondents who hold a leadership position;
- Respondents who work at regulated organisations and interest groups (compared to respondents working at organisations classified as 'public actors'[1] – the reference category)
- Respondents who work in the financial and food sectors (compared to those working with data protection – the reference category);
- Respondents from Belgium, the Netherlands, and Spain (compared to respondents from Poland – the reference category).

What factors influence whether respondents perceive the **enforcement** of regulation to be too strict or too loose? The explanatory analyses, conducted using ordered logistic regression (see section 1.3 for more details), show a number of factors to independently influence whether respondents perceive the enforcement of regulations to be too loose.

Respondents with the following features are **more likely** to perceive the enforcement of regulation to be too loose:

- Respondents who are female (as opposed to respondents who are male);
- Respondents who have a higher level of education;
- Respondents who have a more positive attitude towards stricter government regulation;
- Respondents residing in Germany (compared to respondents residing in Poland – the reference category).

Respondents with the following features are **less likely** to perceive the enforcement of regulation to be too loose:

- Respondents who have been employed at their current organisation for a longer amount of time;
- Respondents who hold a leadership position;
- Respondents from the financial and food sectors (compared to respondents working with data protection – the reference category);
- Respondents working at regulated organisations and interest groups (compared to respondents who work at organisations classified as 'public actors' – 'public actors' is the reference category);
- Respondents residing in Belgium, Denmark, and the Netherlands (compared to respondents residing in Poland – the reference category).

[1] The term 'public actors' includes respondents from parliamentary commissions, regulatory agencies, executive bodies and non-judiciary arbitration bodies.

4.3 Legitimacy of Enforcement Processes

This section examines data on the legitimacy of the enforcement process. Each respondent received a survey question (see below), which measured the concept of legitimacy. The question focused on the *legitimacy of process* rather than measuring the legitimacy of actors. The legitimacy of the regulatory processes in the regulatory regime means that respondents recognize the processes as being appropriate and proper even if they (might) disagree with the content of the decisions made through these processes. Stated differently, legitimacy of the regulatory processes differs from the extent of regulatory consent, as legitimacy is not about whether regime actors agree with the actual content of the decisions taken, but whether the processes by which the decisions are taken are appropriate, proper, and just.

Q: Legitimacy of Enforcement Processes

- Please indicate to what extent you agree with the following statement: The processes through which data protection regulation is enforced in [country] are as they should be.
- Please indicate to what extent you agree with the following statement: The processes through which financial sector regulation is enforced in [country] are as they should be.
- Please indicate to what extent you agree with the following statement: The processes through which food safety regulation is enforced in [country] are as they should be.

Scale: (1) Strongly disagree, (2) Disagree, (3) Somewhat disagree, (4) Neither disagree nor agree, (5) Somewhat agree, (6) Agree, (7) Strongly agree

4.3.1 Exploring the data

This section presents the percentage of answers per answer category and the means for the questions described in section 4.3 on the legitimacy of the enforcement process. Higher means indicate more agreement with the statement.

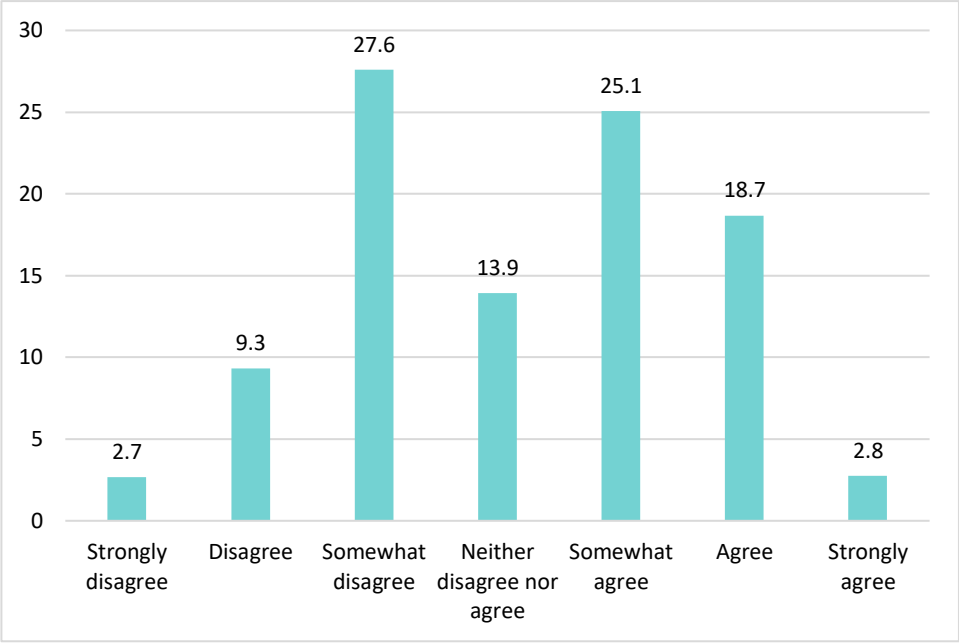

Figure 30: Legitimacy of the enforcement processes (%, N=1200)

As stated in section 4.3, respondents were asked to record their disagreement/agreement with the statement: 'The processes through which [data protection/financial sector/food safety] regulation is

enforced in [country] are as they should be.' Respondents received a sector specific question. Figure 30 presents the percent of answers per answer category.

Approximately 46.6% of the respondents - to some degree - agree with the abovementioned statement (answer categories 5 through 7), whereas approximately 39.6% of the respondents - to some degree - disagree with the statement (answer categories 1 through 3). Approximately 13.9% of respondents neither disagree nor agree with the statement (answer category 4).

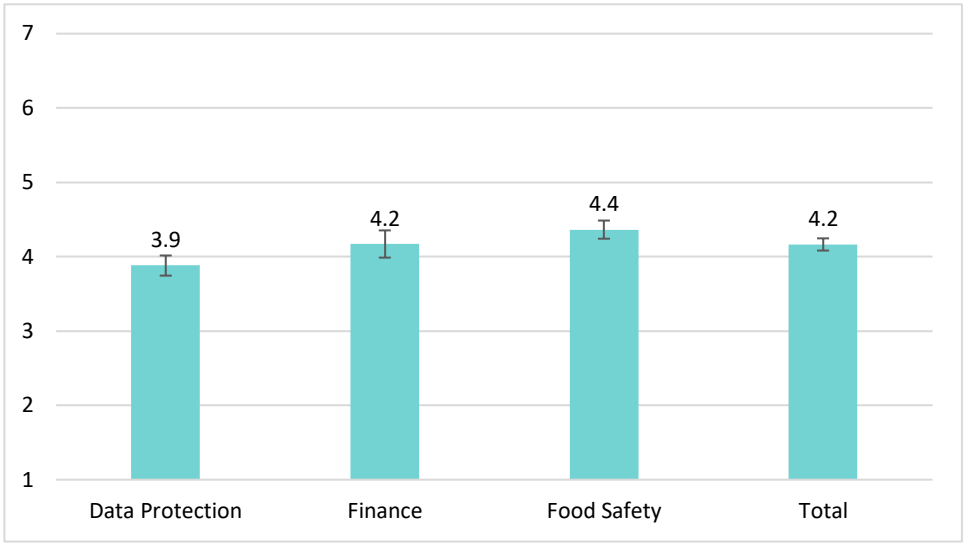

Figure 31: Legitimacy of enforcement processes across sectors (means, N=1200)

Figure 31 depicts the means for respondents' perceptions of the legitimacy of the enforcement process. Data from all countries is included.

As shown in Figure 31, the means for data protection (mean=3.9) and finance (mean=4.2) are slightly less than for food safety (mean=4.4). There is a significant difference between the mean for data protection and the mean for food safety. Respondents working with data protection, on average, disagree with the processes through which regulation in their sector is enforced (mean < 4) whereas respondents in the food and financial sectors on average agree with the processes through which regulation in their sector is enforced (mean > 4).

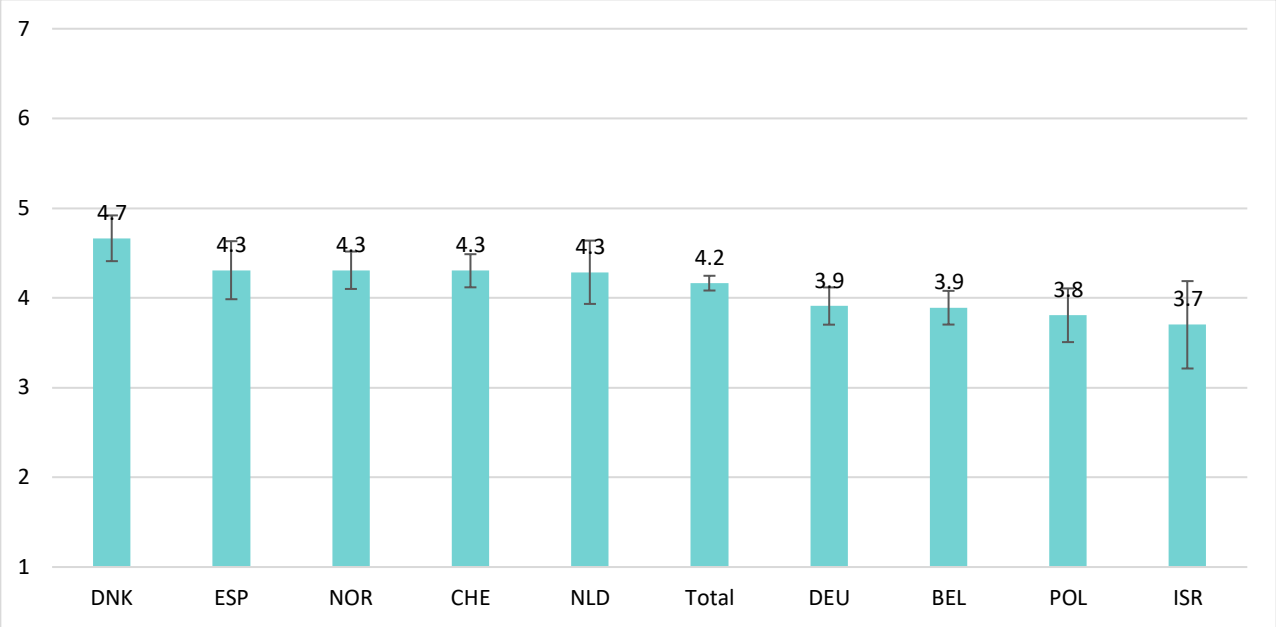

Figure 32: Legitimacy of enforcement processes across countries (means, N=1200)

Figure 32 depicts the means for the questions on respondents' perceptions of the legitimacy of the enforcement process. The data is broken down by country and data from all sectors is included. It is important to note that, on the scale, the answer category '4' is 'Neither disagree nor agree…' Thus, if a country has a mean of four, respondents neither disagree nor agree with the statement, "The processes through which [data protection/financial sector/food safety] regulation is enforced in [country] are as they should be."

Denmark, Spain, Norway, and Switzerland have means greater than the total mean (total mean=4.2), and Germany, Belgium, Poland, and Israel have means less than the total mean. Denmark has the highest mean (mean=4.7), and Israel has the lowest mean (mean=3.7). There is a significant difference between Denmark (mean=4.7) and Germany, Belgium, Poland and Israel (means range from=3.7-3.9).

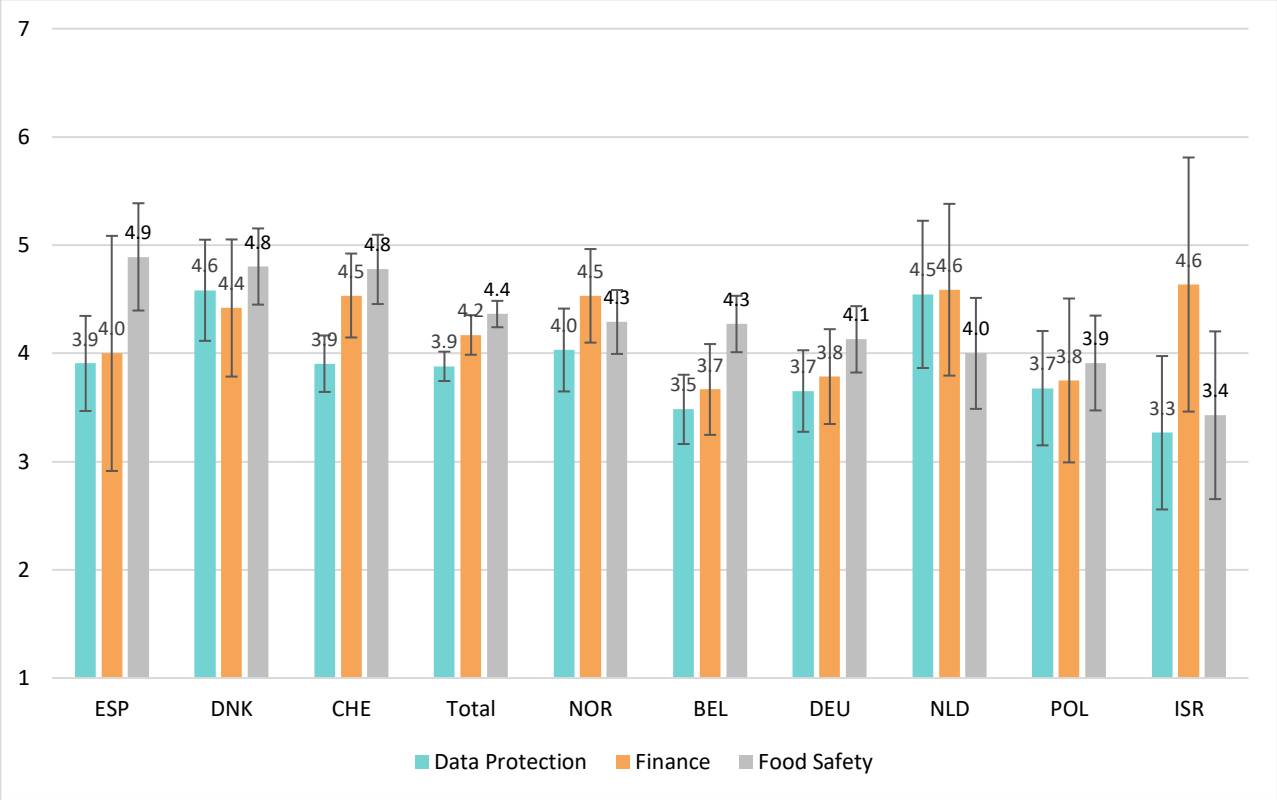

Figure 33: Legitimacy of enforcement processes across sectors and countries (means, N=276-539)

Figure 33 depicts the means for respondents' perceptions on the legitimacy of enforcement processes. The data is broken down by country and sector. The observations are ordered from the highest mean to the lowest mean by the variable 'Food Safety'.

With regards to **data protection**, Denmark, the Netherlands, Norway, Spain, and Switzerland have means greater than or equal to the total mean (total mean=3.9), and Germany, Poland, Belgium, and Israel have means less than the total mean. The mean is highest in Denmark (means=4.6) and lowest in Israel (mean=3.3). There is a significant difference between Denmark and Belgium and the Netherlands and Belgium; the legitimacy of the enforcement process is relatively low in Belgium and is relatively high in Denmark and the Netherlands.

With regards to **finance**, the Netherlands, Israel, Switzerland, Norway, and Denmark have means greater than the total mean (total mean=4.2), and Spain, Germany, Poland, and Belgium have means less than the total mean. The mean is highest in the Netherlands and Israel (means=4.6) and lowest in Belgium (mean=3.7). Switzerland differs significantly from Belgium; the legitimacy of the enforcement process is relatively low in Belgium, and it is relatively high in Switzerland.

With regards to **food safety**, Spain, Denmark, and Switzerland have means greater than the total mean (total mean=4.4), and Norway, Belgium, Germany, the Netherlands, Poland, and Israel have means less than the total mean. The mean is highest in Spain (mean=4.9) and lowest in Israel (mean=3.4). Spain, Denmark, and Switzerland differ significantly from Poland and Israel; the legitimacy of the enforcement process is relatively low in Poland and Israel and is relatively high in Spain, Denmark, and Switzerland.

4.3.2 Discussion of descriptive findings

There are cross-sector and cross-country differences regarding respondents' perspectives on the legitimacy of the enforcement process. In some countries, there are fairly similar means for each of the three sectors; in other countries, some sectors have much higher means than other sectors.

As discussed in the preceding section, there are several significant differences between countries. Countries that score significantly high on the measure of legitimacy in at least two sectors are Denmark and Switzerland. Belgium is the only country that scores significantly low on the measure of legitimacy in at least two sectors.

4.3.3 What determines perceptions of legitimacy of enforcement processes in the regulatory regime?

What are the factors that influence whether respondents perceive the **enforcement processes of regulation to be legitimate**? The explanatory analyses, conducted using ordered logistic regression (see section 1.3 for more details), highlight a number of factors that independently influence how legitimate the respondent finds the processes through which regulation is enforced.

Respondents with the following features are **more likely** to perceive the enforcement processes as legitimate:

- Respondents residing in Denmark, the Netherlands, Norway, Spain, and Switzerland (compared to Poland – reference category);
- Respondents working in the financial and food sector (compared to respondents working with data protection – reference category).

Respondents with the following features are **less likely** to perceive the enforcement processes as legitimate:

- Respondents working at interest groups (compared to respondents working at organisations classified as 'public actors' – reference category).

5. Trust and Distrust in Actors within Regulatory Regimes

This section covers survey questions on respondents' trust and distrust in different types of actors within regulatory regimes. Hence, we now move from measures of overall trust in the regime and different measures of regime performance – broadly speaking – towards respondents' assessments of various actors. First, we report simple trust and distrust measures for multiple types of actors (5.1). Second, we report multi-dimensional trust measures (ability, benevolence, integrity) for supervisory actors (5.2).

5.1 Trust and distrust in actors

To measure trust in several different actors within regulatory regimes, we followed the OECD guidelines and the example set by multiple cross-country surveys (like the ESS, Eurobarometer and others[1]). Thus, the trust question (see Q1 below) is formulated with a common heading ('How much trust do you have...'), followed by a list of (public and private) actors of interest (OECD, 2017, p. 55). In the actual question, they are referred to as "institutions" because respondents were expected to be less familiar with the academic term "actor". The distrust question includes the same list of actors, but is formulated differently to the trust question, focusing on the notion of active distrust, which is operationalized as "being watchful" (see Q2 below). The lists of actors were sector-specific (see below for list of actors). For example, respondents working in the food sector received a list of sector-specific actors (i.e. national agencies regulating food and food safety, European Union level body(ies) regulating food and food safety, etc.). Respondents *never* received questions about their own actor type. For instance, the category "ministry(ies)" was excluded for ministry employees.

Q1: Trust
Think of your experience in your organisation. How much trust do you have in each of the following institutions? *Scale: 0-10, (0) No trust at all, (10) Complete trust*

List of Actors (data protection)
- National agency(ies) regulating the use of personal data
- European Union level body(ies) regulating the use of personal data
- Ministry(ies) involved in developing and implementing data protection legislation
- Politicians in national parliament deciding upon data protection legislation
- Certification and accreditation bodies working with data protection
- Courts

List of Actors (finance)
- National agency(ies) regulating the financial sector
- European Union level body(ies) regulating the financial sector
- Ministry(ies) involved in developing and implementing financial regulation
- Politicians in national parliament deciding upon financial regulation
- Certification and accreditation bodies in the financial sector
- Courts

List of Actors (food safety)
- National agency(ies) regulating food and food safety
- European Union level body(ies) regulating food and food safety
- Ministry(ies) involved in developing and implementing food safety legislation
- Politicians in national parliament deciding upon food safety legislation
- Certification and accreditation bodies in the food safety sector
- Courts

Scale: 0-10, (0) No trust at all, (10) Complete trust

[1] More specifically, surveys such as the Eurobarometer, May 2016; European Social Survey, Wave 6; European Union Statistics on Income and Living Conditions (EU-SILC), 2013; European Quality of Life Survey, 2012.

Q2: Distrust
In your opinion, should your organisation be watchful that the following institutions' actions do not negatively impact your organisation? *Scale: 0-10, (0) Not watchful at all, (10) Very watchful*

Q2 uses the same list of actors as Q1. Please see above.

5.1.1 Exploring the data across all sectors and countries

This section explores the data on trust and distrust in actors within regulatory regimes across all sectors and countries.

The following graphs have two scales. The scale on the left-hand side of the graph, labelled 'Trust', goes from zero to ten, where '0' is 'No trust at all' and '10' is 'Complete trust'. The scale on the right-hand side of the graph, labelled 'Distrust', also goes from zero to ten. However, in this case, '0' is 'Not watchful at all' and '10' is 'Very watchful'.

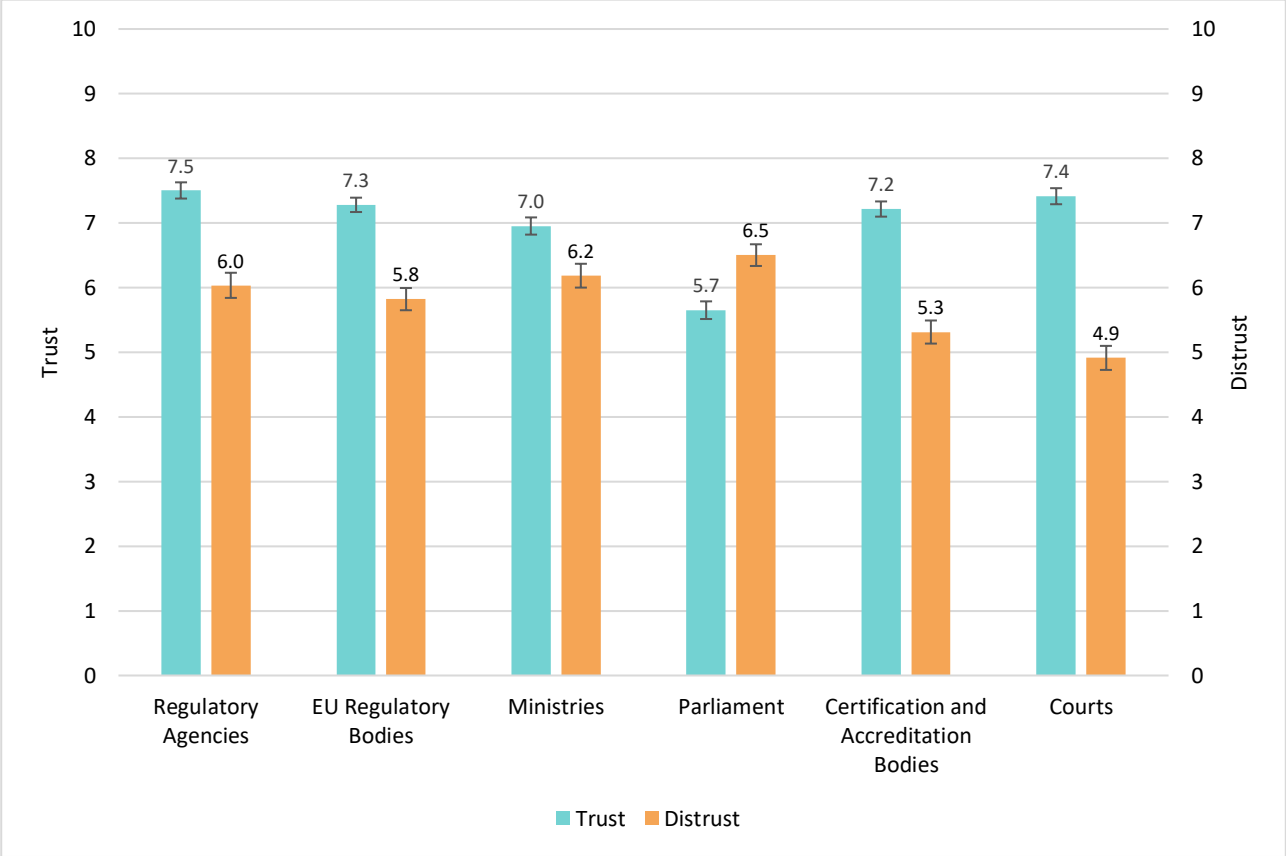

Figure 34: Trust and distrust in actors – all sectors and countries (means, N=962-1244)

Figure 34 depicts means for trust and distrust in actors in regulatory regimes across all countries and sectors. The actors in the graph above are presented in the same order as they were in the survey questionnaire.

Trust is high in regulatory agencies (mean=7.5), EU regulatory bodies (mean=7.3), certification and accreditation bodies (mean=7.2), courts (mean=7.4), and ministries (mean=7.0). By contrast, trust is moderate in parliaments (mean=5.7). Trust in regulatory agencies, EU regulatory bodies, certification and accreditation bodies, and courts is significantly higher than in ministries and parliament.[1]

[1] To describe the graphs, we use the following delineations: 0=not at all, 1-2=very low, 3=low, 4=rather low, 5=moderate, 6=rather high, 7=high, 8-9=very high, 10=complete.

Distrust is rather high in regulatory agencies (mean=6.0), ministries (mean=6.2), and parliament (mean=6.5), is moderate in EU regulatory bodies (mean=5.8) and certification and accreditation bodies (mean=5.3), and is rather low in courts (mean=4.9). Distrust is significantly higher in regulatory agencies, EU regulatory bodies, ministries, and parliament than in certification and accreditation bodies and courts. Moreover, distrust is significantly higher in parliament than in all other actors, excluding ministries.

For regulatory agencies, EU regulatory bodies, ministries, parliament, certification and accreditation bodies, and courts, the means for trust are greater than five (five is the middle category on the zero to ten scale, where '0' is 'No trust at all' and '10' is 'Trust completely'). Thus, there is a degree of trust in these actors. Interestingly, for all actors **except for courts**, the distrust means are also greater than five (five is the middle category on this zero to ten scale, where '0' is 'Not watchful at all' and '10' is 'Very watchful'). Thus, **while respondents trust regulatory agencies, EU regulatory bodies, ministries, parliament, and certification and accreditation bodies, they also feel like they have to, albeit to different degrees, be 'watchful' to ensure that the actions of these actors do not negatively impact their institutions.**

There are two other key findings: (1) parliament is the only actor for which distrust is higher than trust and (2) there is more variation in the means for distrust than in the means for trust.

5.1.2 Exploring the data by sector

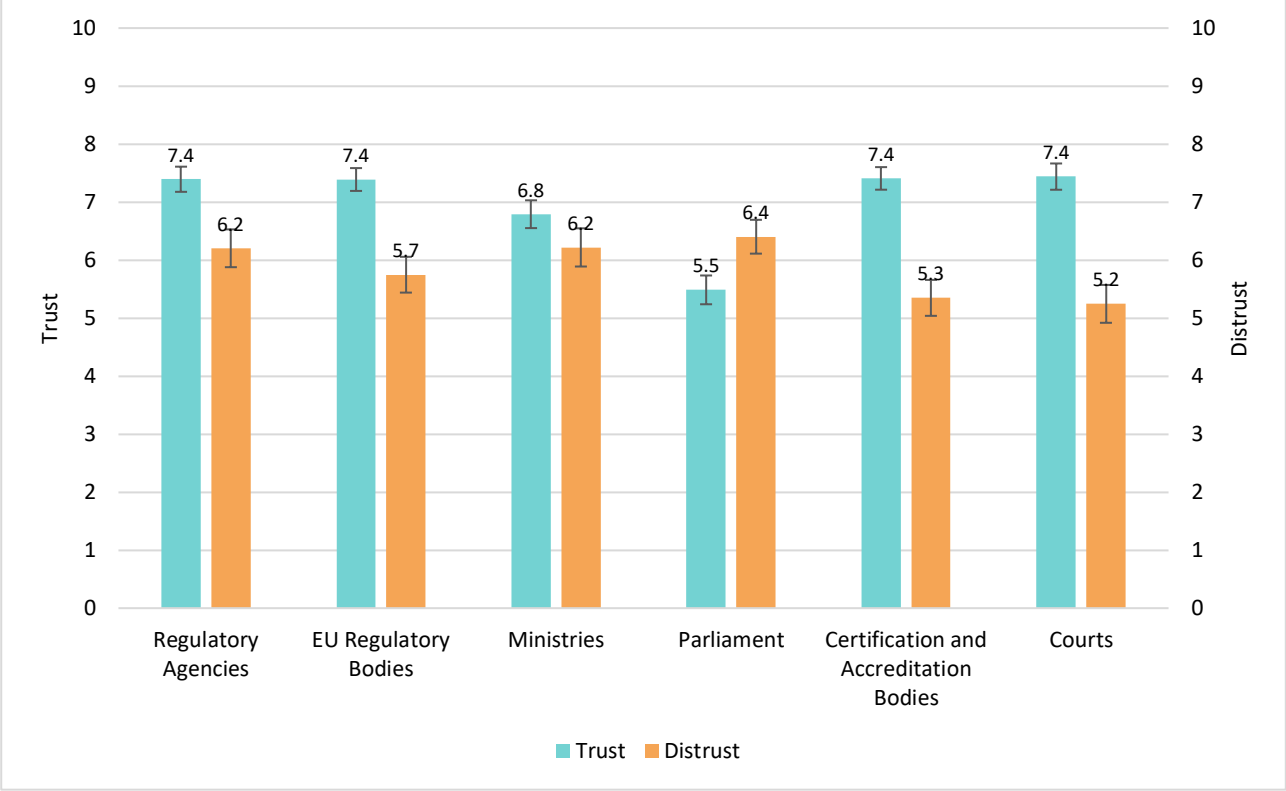

Figure 35: Trust and distrust in actors – data protection (means, N=315-398)

Figure 35 depicts the means for trust and distrust in different actors working with data protection, specifically. The actors in the graph above are presented in the same order as they were in the survey questionnaire.

Trust is high in regulatory agencies (mean=7.4), EU regulatory bodies (mean=7.4), certification and accreditation bodies (mean=7.4), and courts (mean=7.4). Trust is rather high in ministries (mean=6.8) and is moderate in parliament (mean=5.5). Trust is significantly higher in regulatory agencies, EU regulatory bodies,

certification and accreditation bodies, and courts than it is in ministries and parliament. Moreover, trust is significantly higher in ministries than it is in parliament.

Distrust is rather high in parliament (mean=6.4), ministries (mean=6.2), and regulatory agencies (mean=6.2), and it is moderate in EU regulatory bodies (mean=5.7), certification and accreditation bodies (mean=5.3), and courts (mean=5.2). Distrust is *significantly* higher in regulatory agencies, ministries, and parliament than it is in certification bodies and courts.

The trust means are greater than five, indicating that respondents have some degree of trust in these actors' work as it relates to data protection. However, distrust means are also greater than five, indicating that while respondents have some degree of trust in these actors they also feel that they have to be 'watchful' to ensure these actors' actions do not negatively impact their own organisation.

The general pattern of trust and distrust is broadly similar to the full sample of respondents including all three sectors (see Figure 34). There are similar levels of trust in regulatory agencies, EU regulatory bodies, and courts. There is slightly lower trust in ministries and parliament and slightly higher trust in certification and accreditation bodies among respondents working with data protection. Distrust levels are similar to the total sample for EU regulatory bodies, ministries, parliament, and certification and accreditation bodies. However, distrust levels are slightly higher for regulatory agencies and courts among respondents working with data protection.

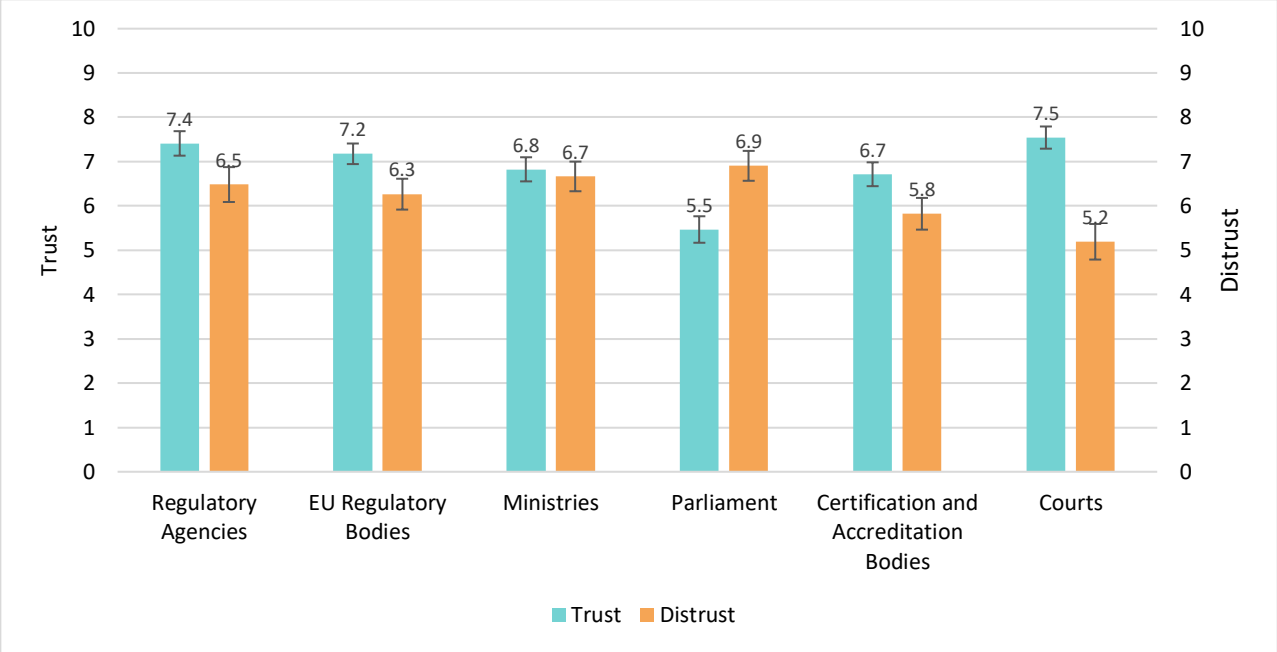

Figure 36: Trust and distrust in actors – finance (means, N=218-290)

Figure 36 depicts means for trust and distrust in different actors in the **financial sector**. The actors in the graph above are presented in the same order as they were in the survey questionnaire.

Trust is high in regulatory agencies (mean=7.4), EU regulatory bodies (mean=7.2), and courts (mean=7.5). Trust is lower, though still rather high, in ministries (mean=6.8) and certification and accreditation bodies (mean=6.7). Trust is moderate in parliament (mean=5.5). Trust in courts is significantly higher than trust in ministries, parliament, and certification and accreditation bodies. Moreover, trust in all actors is significantly higher than trust in parliament.

Distrust is rather high in regulatory agencies (mean=6.5), EU regulatory bodies (mean=6.3), ministries (mean=6.7), and parliament (mean=6.9), and it is moderate in certification and accreditation bodies (mean=5.8) and courts (mean=5.2). Distrust is significantly higher in regulatory agencies, EU regulatory

bodies, ministries, and parliament than it is in courts. Moreover, distrust is significantly higher in ministries and parliament than it is in certification bodies and courts.

The trust means are greater than five, indicating that respondents have some degree of trust in these actors' work as it relates to finance. However, distrust means are also greater than five, indicating that while respondents have trust in these actors, they also feel that they have to be 'watchful' to ensure these actors' actions do not negatively impact their organisation.

The general pattern of trust and distrust is slightly different in the finance sector than it is in full sample of respondents including all three sectors (see Figure 34). Trust levels are similar for regulatory agencies, EU regulatory bodies, and courts. Trust levels are slightly lower in the finance sector for ministries and parliament, but are considerably lower for certification and accreditation bodies. Across the board, distrust levels are considerably higher for the finance sector compared to the full sample.

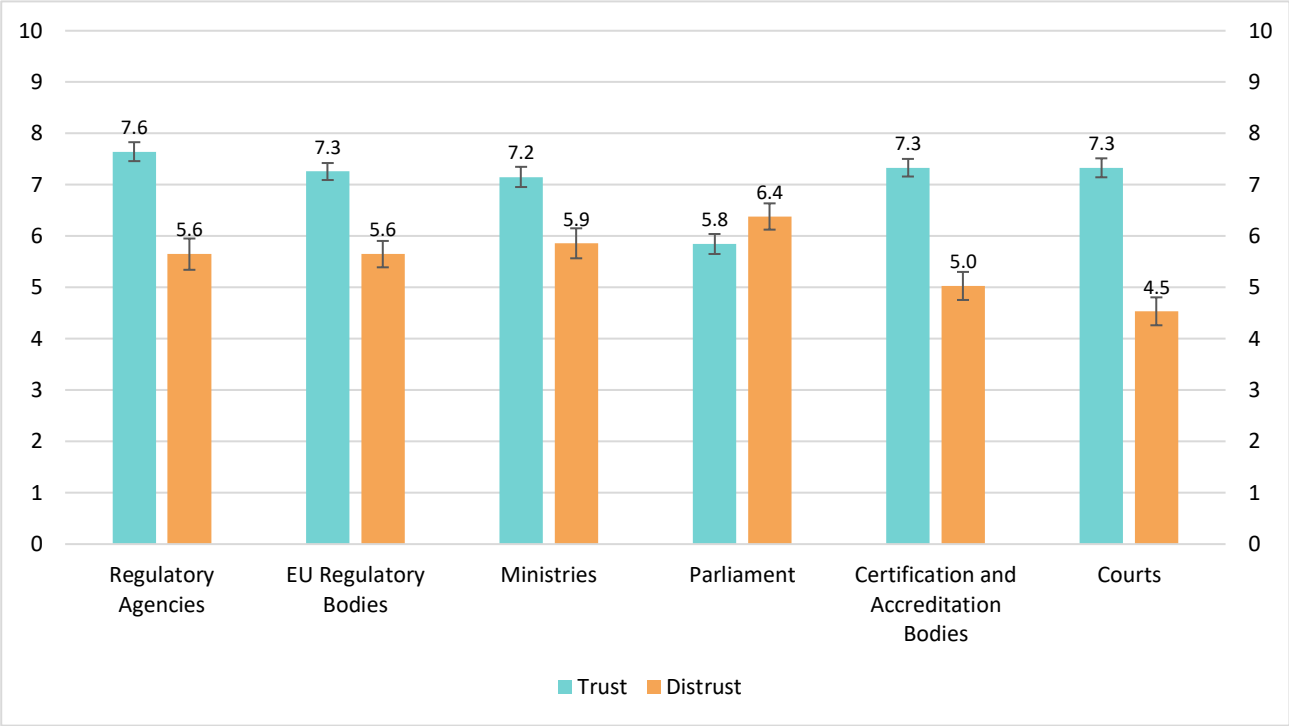

Figure 37: Trust and distrust in actors – food safety (means, N=401-566)

Figure 37 depicts trust and distrust in different actors in the **food sector**. The actors in the graph above are presented in the same order as they were in the survey questionnaire.

Trust is high in regulatory agencies (mean=7.6), EU regulatory bodies (mean=7.3), ministries (mean=7.2), certification and accreditation bodies (mean=7.3), and courts (mean=7.3). Trust in parliament, however, is moderate (mean=5.8). Trust in all actors is significantly higher than trust in parliament. Moreover, trust in regulatory agencies is significantly higher than trust in ministries.

Distrust is rather high in parliament (mean=6.4), is moderate in ministries (mean=5.9), EU regulatory bodies (mean=5.6), regulatory agencies (mean=5.6), certification and accreditation bodies (mean=5.0), and is rather low in courts (mean=4.5). Distrust is significantly higher in parliament than in regulatory agencies, EU regulatory bodies, certification and accreditation bodies, and courts. Moreover, distrust is significantly higher in ministries and parliament than it is in certification bodies and courts.

The trust means are greater than five, indicating that respondents have trust in these actors' work as it relates to food safety. Distrust means are also greater than five, for all actors except for courts, indicating that while

respondents have some degree of trust in these actors, they also feel that they have to be 'watchful' to ensure these actors' actions do not negatively impact their organisation.

The general pattern of trust and distrust in the food sector is broadly similar to the full sample of respondents including all three sectors (see Figure 34). Trust levels are similar to those in the full sample for regulatory agencies, EU regulatory bodies, parliament, and certification and accreditation bodies. Trust levels are slightly higher for ministries. Distrust levels are lower than in the full sample; regulatory agencies, ministries, certification and accreditation bodies, and courts are considerably lower, and parliament and EU regulatory bodies are slightly lower in the food sector than in the full sample.

5.1.3 Exploring the data by country and actors

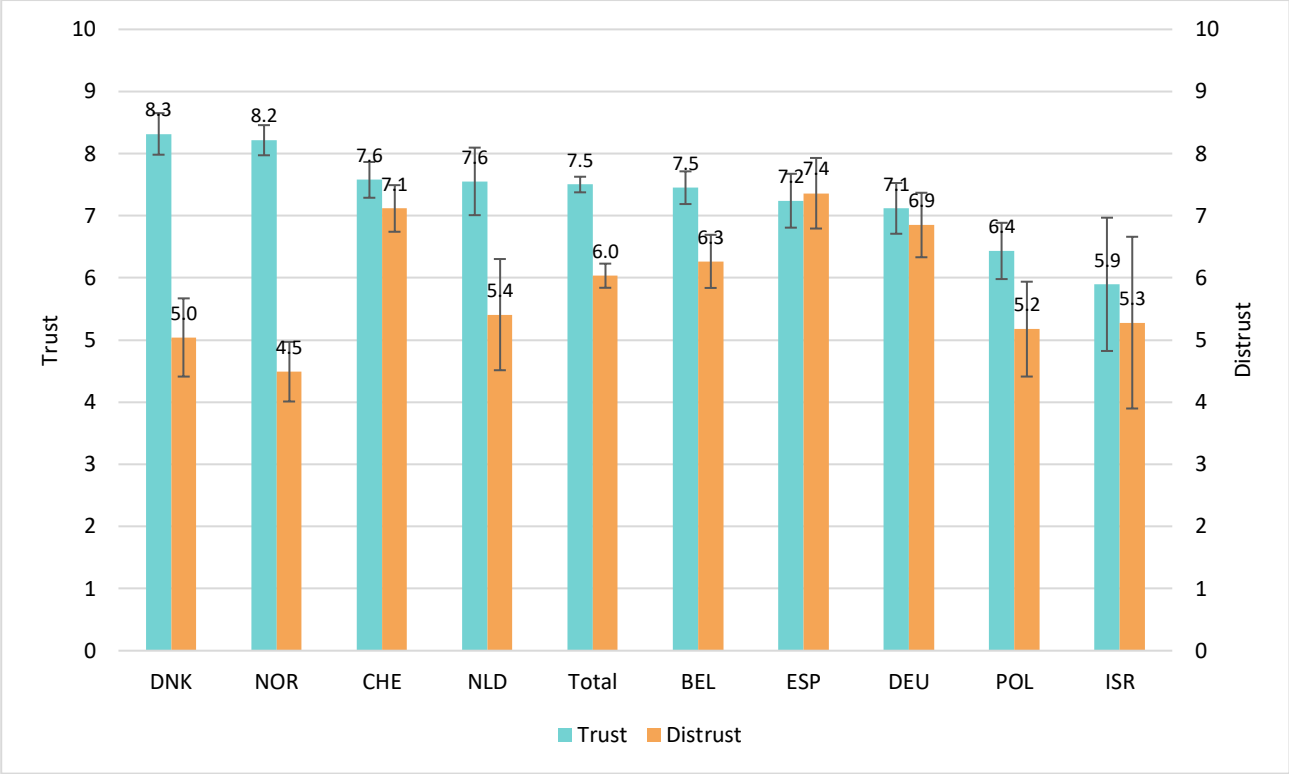

Figure 38: Trust and distrust in regulatory agencies (means, N=962-1022)

Figure 38 depicts trust and distrust in **regulatory agencies** across all countries and all sectors. The observations are ordered from the highest mean to the lowest mean by the variable 'Trust'.

Trust in regulatory agencies is very high in Denmark (mean=8.3) and Norway (mean=8.2). Trust is high Switzerland (mean=7.6), the Netherlands (mean=7.6), Belgium (mean=7.5), Spain (mean=7.2), and Germany (mean=7.1). Trust is rather high in Poland (mean=6.4) and is moderate in Israel (mean=5.9). There are several significant differences between the countries. In Denmark and Norway, trust is significantly higher than in Switzerland, Belgium, Spain, Germany, Poland, and Israel. Moreover, trust in Denmark, Norway, Switzerland, and Belgium is significantly higher than trust in Poland and Israel.

Distrust in regulatory agencies is high in Spain (mean=7.4) and Switzerland (mean=7.1), and it is rather high in Germany (mean=6.9) and Belgium (mean=6.3). In Denmark (mean=5.0), the Netherlands (mean=5.4), Israel (mean=5.3), and Poland (mean=5.2) distrust is moderate. In Norway (mean=4.5), distrust is rather low. Spain and Switzerland differ significantly from Belgium, the Netherlands, Israel, Poland, Denmark, and Norway; distrust is relatively high in Spain and Switzerland. Moreover, Denmark and Norway differ

significantly from Spain, Switzerland, Germany, and Belgium; distrust is relatively low in Denmark and Norway.

The trust means are greater than five, indicating that respondents have some degree of trust in regulatory agencies' work. However, distrust means for all countries except Norway are also greater than five, indicating that while respondents have some degree of trust in regulatory agencies they also feel that they have to be 'watchful' to ensure regulatory agencies' actions do not negatively impact their organisation.

There is considerable variation between countries with regards to distrust in regulatory agencies. Some countries, for example, Spain, Switzerland, and Germany have both high trust and high distrust. The Scandinavian countries of Norway and Denmark stand out as having both high trust and low distrust. In both the Netherlands and Belgium, we find comparable levels of trust, but clearly lower levels of distrust compared to countries with high levels of trust and distrust (Switzerland, Spain, and Germany).

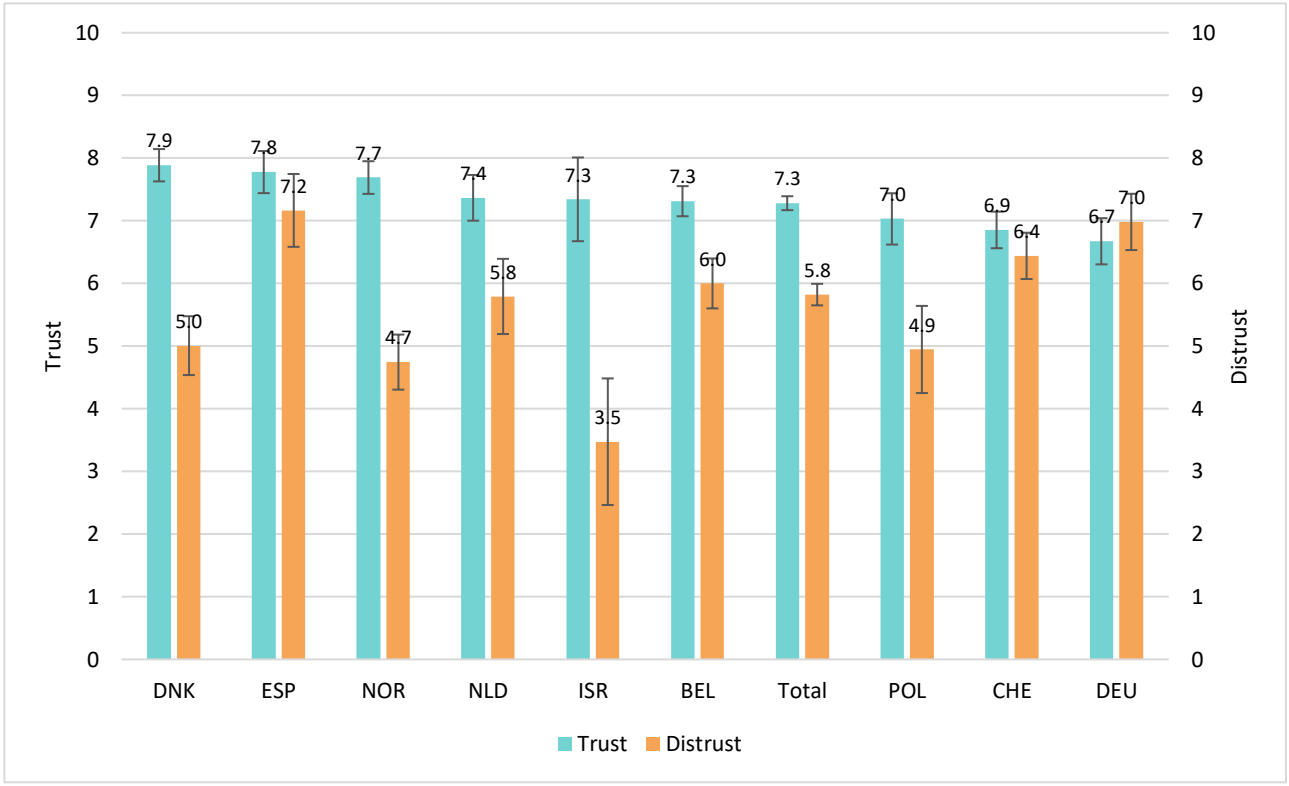

Figure 39: Trust and distrust in EU regulatory bodies (means, N=1184-1246)

Figure 39 depicts trust and distrust in **EU regulatory bodies** across all countries and all sectors. The observations are ordered from the highest mean to the lowest mean by the variable 'Trust'.

Trust in EU regulatory bodies is high in Denmark (mean=7.9), Spain (mean=7.8), Norway (mean=7.7), the Netherlands (mean=7.4), Israel (mean=7.3), Belgium (mean=7.3), and Poland (mean=7.0). In Switzerland (mean=6.9) and Germany (mean=6.7), trust is rather high. Denmark, Spain, and Norway differ significantly from Switzerland and Germany; trust is comparatively high in Denmark, Spain, and Norway and comparatively low in Switzerland and Germany.

Distrust in EU regulatory bodies is high in Spain (mean=7.2) and Germany (mean=7.0), and it is rather high in Switzerland (mean=6.4) and Belgium (mean=6.0). Distrust is moderate in the Netherlands (mean=5.8) and Denmark (mean=5.0), and it is rather low in Poland (mean=4.9) and Norway (mean=4.7). Finally, distrust is low in Israel (mean=3.5). There are several significant differences. (1) Spain, Germany, Switzerland, and Belgium differ significantly from Denmark, Norway, and Israel; distrust is relatively high in Spain, Germany, Switzerland, and Belgium and distrust is relatively low in Denmark, Norway, and Israel. (2) Spain and

Germany, where distrust is relatively high, differ significantly from all countries except Switzerland. (3) Israel, where distrust is relatively low, differs significantly from all countries except Norway and Poland.

The trust means are greater than five, indicating that respondents have some degree of trust in EU regulatory bodies' work. The distrust means for some countries – Denmark, Spain, the Netherlands, Belgium, Switzerland, and Germany – are greater than five, indicating that while respondents have some degree of trust in EU regulatory bodies they also feel that they have to be 'watchful' to ensure their actions do not negatively impact their organisation. In Norway, Israel, and Poland, the distrust means are less than five, indicating that respondents in these countries do not feel that they have to be 'watchful' (to some degree) to ensure EU regulatory bodies' actions do not negatively impact their organisation.

There is considerable variation between countries with regards to trust and distrust in EU regulatory bodies. Interestingly, respondents in Spain, Switzerland, and Germany on average have both high trust and high distrust in EU regulatory bodies. The Scandinavian countries of Norway and Denmark stand out as having both high trust and low distrust.

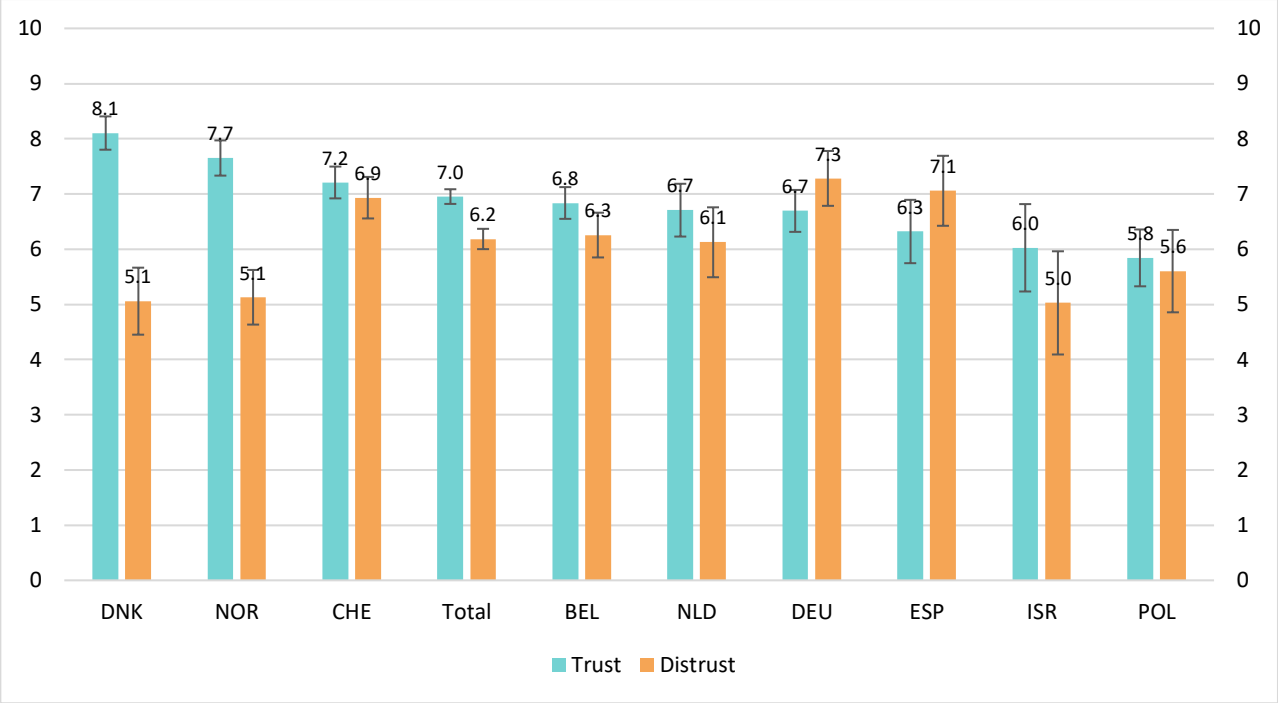

Figure 40: Trust and distrust in ministries (means, N=986-1039)

Figure 40 depicts trust and distrust in **ministries** across all countries and all sectors. The observations are ordered from the highest mean to the lowest mean by the variable, 'Trust'.

Trust in ministries is very high in Denmark (mean=8.1). Trust is high in Norway (mean=7.7) and Switzerland (mean=7.2), and it is rather high in Belgium (mean=6.8), the Netherlands (mean=6.7), Germany (mean=6.7), Spain (mean=6.3), and Israel (mean=6.0). Trust is moderate in Poland (mean=5.8). Denmark and Norway differ significantly from Belgium, the Netherlands, Germany, Spain, Israel and Poland; trust in Denmark and Norway is relatively high. Denmark differs significantly from all countries except Norway. Moreover, Denmark, Norway, Switzerland, and Belgium differ significantly from Poland, where trust is relatively low.

Distrust in ministries is high in Germany (mean=7.3) and Spain (mean=7.1), is rather high in Switzerland (mean=6.9), Belgium (mean=6.3), and the Netherlands (mean=6.1), and is moderate in Israel (mean=5.0), Denmark (mean=5.1), Norway (mean=5.1), and Poland (mean=5.6). Germany differs significantly from Belgium, Poland, Norway, Denmark, and Israel; distrust is relatively high in Germany. Moreover, Germany,

Spain, and Switzerland differ significantly from Norway, Denmark, and Israel; distrust is relatively high in Germany, Spain, and Switzerland and it is relatively low in Norway, Denmark, and Poland.

The trust means are greater than five, indicating that respondents have some degree of trust in these ministries' work. However, distrust means for all countries are also greater than or equal to five, indicating that while respondents have some degree of trust in ministries they also feel that they have to be 'watchful' to ensure that their actions do not negatively impact their organisation.

There is considerable variation between the countries with regards to distrust in ministries. Interestingly, many of the countries have fairly similar levels of trust and distrust. The Scandinavian countries of Norway and Denmark stand out as having both high degrees of trust and comparatively low degrees of distrust.

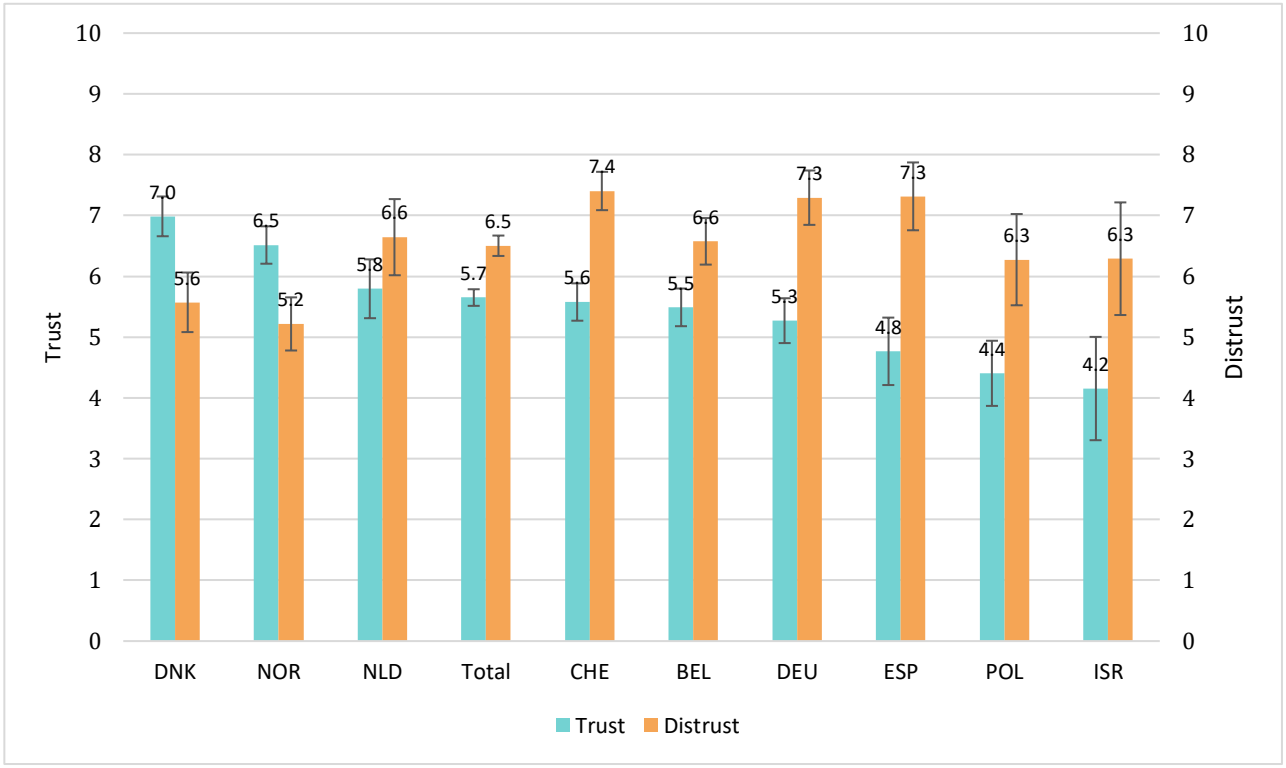

Figure 41: Trust and distrust in parliament (means, N=1094-1154)

Figure 41 depicts trust and distrust in **parliament** across all countries and all sectors. The observations are ordered from the highest mean to the lowest mean by the variable, 'Trust'.

Trust in parliament is high in Denmark (mean=7.0) and is rather high in Norway (mean=6.5). Trust is moderate in the Netherlands (mean=5.8), Switzerland (mean=5.6), Belgium (mean=5.5), and Germany (mean=5.3), and it is rather low in Spain (mean=4.8), Poland (mean=4.4), and Israel (mean=4.2). Trust in Denmark and Norway is significantly higher than in Switzerland, Belgium, Germany, Spain, Poland, and Israel. Moreover, trust in Denmark, Norway, the Netherlands, Switzerland, and Belgium is higher than trust in Poland and Israel.

Distrust in parliament is high in Switzerland (mean=7.4), Germany (mean=7.3), and Spain (mean=7.3), is rather high in the Netherlands (mean=6.6), Belgium (mean=6.6), Poland (mean=6.3), and Israel (mean=6.3), and is moderate in Norway (mean=5.2) and Denmark (mean=5.6). Switzerland, Spain, Germany, and Belgium differ significantly from Denmark and Norway; distrust is relatively high in Switzerland, Spain, Germany, and Belgium and relatively low in Denmark and Norway.

Respondents in Denmark, Norway, the Netherlands, Switzerland, Belgium, and Germany have a degree of trust in parliament (means > 5). However, respondents in Spain, Poland, and Israel (means < 5) lack trust (to varying degrees) parliament. Distrust means for all countries are greater than five, indicating that

respondents feel that they have to be 'watchful' (to some degree) to ensure that the actions of parliament do not negatively impact their organisation.

In short, the Scandinavian countries of Norway and Denmark stand out as having, in comparison, higher levels of trust and lower levels of distrust than the other countries studied.

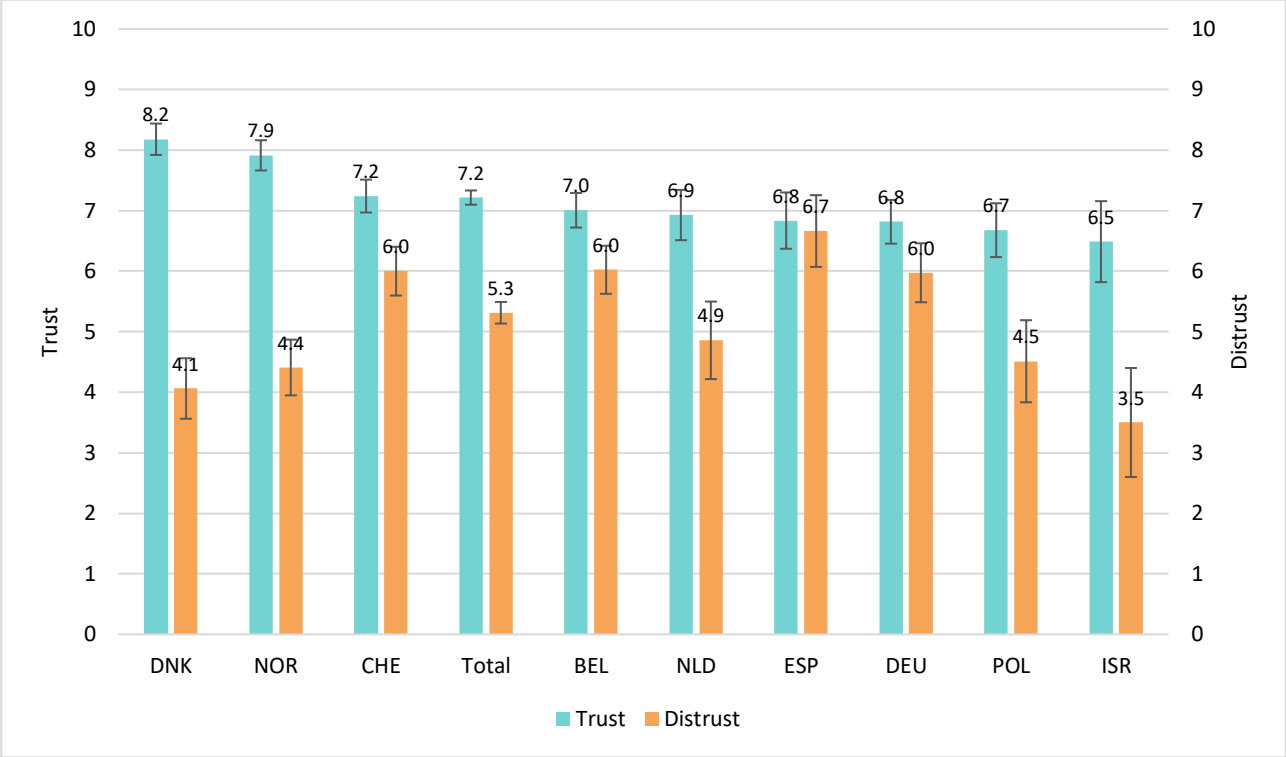

Figure 42: Trust and distrust in certification and accreditation bodies (means, N=1077-1129)

Figure 42 depicts trust and distrust in **certification and accreditation** bodies across all countries and all sectors. The observations are ordered from the highest mean to the lowest mean by the variable 'Trust'.

Trust in certification and accreditation bodies is very high in Denmark (mean=8.2), and trust is high in Norway (mean=7.9), Switzerland (mean=7.2), and Belgium (mean=7.0). Trust is rather high in the Netherlands (mean=6.9), Spain (mean=6.8), Germany (mean=6.8), Poland (mean=6.7), and Israel (mean=6.5). Denmark and Norway, which have relatively high trust levels, stand out as significantly different from the other countries.

Distrust in certification and accreditation bodies is rather high in Spain (mean=6.7), Switzerland (mean=6.0), Belgium (mean=6.0), and Germany (mean=6.0). Distrust is rather low in the Netherlands (mean=4.9), Poland (mean=4.5), Norway (mean=4.4), and Denmark (mean=4.1). Distrust is low in Israel (mean=3.5). Spain, Belgium, Switzerland, and Germany differ significantly from Poland, Norway, Denmark, and Israel; distrust is relatively high in Spain, Belgium, Switzerland, and Germany and it is relatively low in Poland, Norway, Denmark, and Israel.

The trust means are greater than five, indicating that respondents have some degree of trust in certification and accreditation bodies' work. Distrust means for Denmark, Norway, the Netherlands, Poland, and Israel are less than five. Thus, respondents in these countries *do not believe* that they have to be 'watchful' to ensure certification and accreditation bodies' actions do not negatively impact their organisation. Distrust means in Switzerland, Belgium, Spain, and Germany are greater than five. Thus, respondents in these countries *believe* that they have to be 'watchful' to ensure certification and accreditation bodies' actions do not negatively impact their organisation.

There is considerable variation between countries with regards to distrust. Countries have either rather high distrust or rather low distrust. In contrast, there are only few (significant) differences between countries with regards to trust.

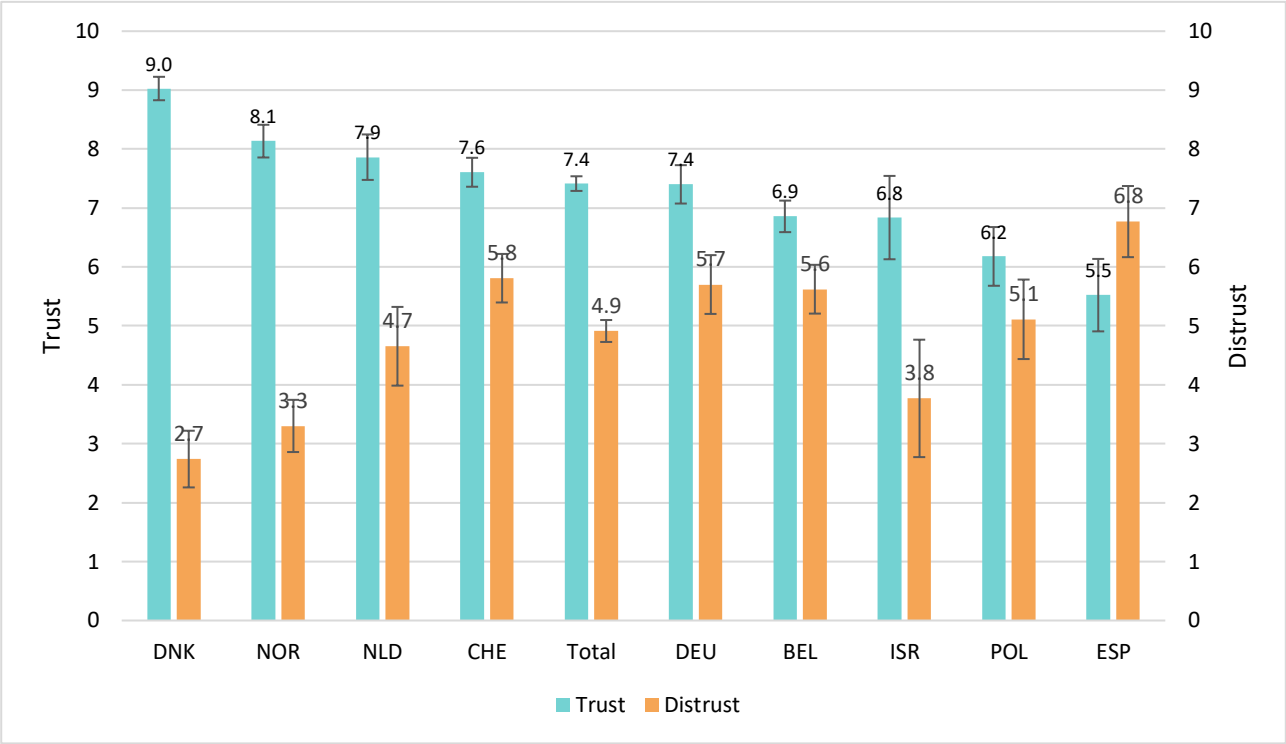

Figure 43: Trust and distrust in courts (means, N=1183-1244)

Figure 43 depicts trust and distrust in **courts** across all countries and all sectors. The observations are ordered from the highest mean to the lowest mean by the variable 'Trust'.

Trust in courts is very high in Denmark (mean=9.0) and Norway (mean=8.1). Trust is high in the Netherlands (mean=7.9), Switzerland (mean=7.6), and Germany (mean=7.4), and it is rather high in Belgium (mean=6.9), Israel (mean=6.8), and Poland (mean=6.2). Trust is moderate in Spain (mean=5.5). There are several significant differences between countries. (1) Denmark differs significantly from all other countries; respondents in Denmark on average have relatively high trust in courts. (2) Norway differs significantly from Germany, Belgium, Israel, Poland, and Spain; respondents in Norway on average have relatively high trust. (3) Denmark, Norway, the Netherlands, Switzerland, Germany, and Belgium differ significantly from Spain; on average respondents in Spain have relatively low trust. (4) Denmark, Norway, the Netherlands, Switzerland, and Germany differ significantly from both Poland and Spain, where trust is on average relatively low.

Distrust in courts is rather high in Spain (mean=6.8) and is moderate in Switzerland (mean=5.8), Germany (mean=5.7), Belgium (mean=5.6), and Poland (mean=5.1). Distrust is rather low in the Netherlands (mean=4.7), is low in Israel (mean=3.8) and Norway (mean=3.3), and is very low in Denmark (mean=2.7). There are three significant differences between the countries. (1) Spain, Switzerland, Germany, Belgium, Poland, and the Netherlands differ significantly from Norway and Denmark, where distrust is relatively low. (2) Spain differs significantly from Belgium, Poland, the Netherlands, Israel, Norway, and Denmark; distrust is relatively high in Spain. (3) Spain, Switzerland, Germany, and Belgium differ significantly from Israel, where distrust – like in Norway and Denmark – is relatively low.

The means for trust are greater than five, indicating that all respondents have some degree of trust in courts. Distrust means for Denmark, Norway, the Netherlands, and Israel are less than five. Thus, respondents in

these countries do not believe (to some degree) that they have to be 'watchful' to ensure courts' actions do not negatively impact their organisation. Distrust means for Switzerland, Germany, Belgium, Poland, and Spain are greater than five. Thus, respondents in these countries believe (to some degree) that they have to be 'watchful' to ensure that courts' actions do not negatively impact their organisation.

There is considerable variation between countries with regards to both trust and distrust. The Scandinavian countries of Norway and Denmark stand out as having both high trust and low distrust.

5.1.4 Discussion of descriptive findings

There are many similarities and differences between the graphs presented and explained in sections 5.1.1, 5.1.2, and 5.1.3, which depict trust and distrust in six different types of actors: regulatory agencies, EU regulatory bodies, ministries, parliament, certification and accreditation bodies, and courts.

Across the three sectors (see Figure 34), trust means are greater than five ('5' is the middle category on this zero to ten scale, where '0' is 'No trust at all' and '10' is 'Trust completely'). For all actors **except for courts**, the distrust means are also greater than five ('5' is the middle category on this zero to ten scale, where '0' is 'Not watchful at all' and '10' is 'Very watchful'). Thus, **while respondents trust regulatory agencies, EU regulatory bodies, ministries, parliament, and certification and accreditation bodies, they also feel like they have to, albeit to different degrees, be 'watchful' to ensure that the actions of these actors do not negatively impact their institutions.**

There are clear patterns regarding trust and distrust in regulatory agencies, EU regulatory bodies, ministries, parliament, certification and accreditation bodies, and courts. Respondents generally have the **highest levels of trust in courts and regulatory agencies (see Figure 34).** Moreover, respondents consistently have low levels of trust in parliament. **Trust is always lowest and distrust is always highest in parliament.** This is also reflected in other surveys, such as the WVS, EVS, and ESS, which find that citizens have low levels of trust towards political parties and politicians (Maman et al. 2020, pp. 16-18).

Interestingly, **distrust does not appear to be the exact opposite of trust.** In some countries, such as Denmark (see for example Figure 42), respondents have high trust and rather low distrust. In other countries (for example Spain in Figure 42), respondents have rather high trust and rather high distrust. In Germany and Spain, distrust is, in some cases, higher than trust. (1) With regards to ministries, Germany and Spain have higher levels of distrust than trust. (2) With regards to EU regulatory bodies, distrust is higher than trust in Germany. (3) With regards to regards to regulatory agencies and courts, distrust is higher than trust in Spain. For all other actors, with the exception of parliament, trust levels are always higher than distrust levels (according to our measurement). These results give evidence that further investigations should be made into (1) the separation of trust and distrust and (2) underlying dimensions of trust and distrust to see how it is possible that they both coexist at high levels.

When looking at the most aggregated data, there is less variation in the means for trust than there is in the means for distrust (see Figure 34). The means for trust in all actors *excluding parliament* fall between 7.0 and 7.5. However, the means for distrust in all actors *excluding parliament* fall between 4.9 and 6.2 – just around double the variation.

With regards to specific countries, several patterns appear. **For all actors** – regulatory bodies, EU regulatory bodies, ministries, parliament, certification and accreditation bodies, and courts – **Denmark has the highest means for trust**. Norway, for all actors except EU regulatory bodies, has the second highest means for trust. Respondents in Norway and Denmark have not just high trust, but also comparatively low distrust. **For all actors except EU regulatory bodies and courts, trust is lowest in Israel and Poland**. For courts, trust is lowest in Spain, and for EU regulatory bodies, trust is lowest in Germany.

5.1.5 What determines trust or distrust in actors in regulatory regimes?

The analyses, conducted with OLS, use a number of relevant variables (see section 1.3 for more details) in order to explain respondents' perceptions of trust and distrust in some crucial actors, namely regulatory agencies, the EU-level regulatory bodies, ministries, parliament, certification and accreditation bodies as well as courts.

What factors influence respondents' trust and distrust in regulatory agencies?

Respondents with the following features are **more likely** to report higher levels of **trust** in regulatory agencies:

- Respondents who have more generalized trust in other people;
- Respondents who have a more positive attitude towards stricter government regulation;
- Respondents residing in Belgium, Denmark, Germany, the Netherlands, Norway, Spain, and Switzerland, (compared to respondents from Poland – reference category).

Respondents with the following features are **less likely** to report higher levels of **trust** in regulatory agencies:

- Respondents working at regulated organisations and interest groups (compared to respondents who work at organisations classified as 'public actors'[1] – reference category);

Respondents are **more likely** to report higher levels of **distrust** in regulatory agencies when they:

- Work at a regulated organisation or an interest group (compared to respondents working at organisations classified as 'public actors' – reference category);
- Work in the financial sector (compared to working with data protection – reference category);
- Reside in Belgium, Germany, Spain, or Switzerland (compared to respondents residing in Poland – reference category).

Respondents are **less likely** to report higher levels of **distrust** in regulatory agencies when they:

- Have a higher level of education;
- Reside in Norway (compared to respondents residing in Poland – reference category).

What influences respondents' trust and distrust in EU-level regulatory bodies?

Respondents with the following features are **more likely** to have higher levels of **trust** in EU-level bodies:

- Respondents who have higher levels of education;
- Respondents who have more generalized trust in other people;
- Respondents who have a more positive attitude towards stricter government regulation.

Respondents with the following features are **less likely** to have higher levels of **trust** in EU-level bodies:

- Respondents working in the financial sector and the food sector (compared to respondents working with data protection – reference category);
- Respondents working at interest groups (compared to respondents working at organisations classified as 'public actors' – reference category);
- Respondents residing in Germany and Switzerland (compared to Polish respondents – reference category).

Respondents are **more likely** to report higher levels of **distrust** in EU-level bodies when they:

- Work at regulated organisations or interest groups (compared to respondents working at organisations classified as 'public actors' – reference category);
- Work in the financial sector (compared to respondents working with data protection – reference category);

[1] The term 'public actors' includes respondents from parliamentary commissions, regulatory agencies, executive bodies and non-judiciary arbitration bodies.

- Reside in Belgium, Germany, Spain, or Switzerland (compared to respondents residing in Poland – reference category).

Respondents are **less likely** to report higher levels of **distrust** in EU-level bodies when they:
- Have a higher level of education;
- Reside in Israel (compared to respondents residing in Poland – reference category).

What factors influence respondents' trust and distrust in ministries?

Respondents with the following features are **more likely** to have higher levels of **trust** in ministries:
- Respondents who have more generalized trust in other people;
- Respondents who have a positive attitude towards stricter government regulation of the economy;
- Respondents who reside in Belgium, Denmark, Germany, Norway, or Switzerland (compared to respondents residing in Poland – reference category).

Respondents with the following features are **less likely** to have higher levels of **trust** in ministries:
- Respondents who work in regulated organisations, certification and accreditation bodies, and interest groups (compared to respondents working in organisations classified as 'public actors' – reference category).
- Respondents who work in the financial sector (compared to respondents working with data protection – reference category).

Distrust in ministries is **more likely** to be high for respondents:
- Who work in the financial sector (compared to respondents working with data protection – reference category);
- Who work at regulated organisations and interest groups (compared to respondents working in organisations classified as public actors – reference category);
- Who reside in Germany, Spain, or Switzerland (compared to respondents residing in Poland – reference category).

Distrust in ministries is **less likely** to be high for respondents:
- With higher levels of education
- Who reside in Norway (compared to respondents residing in Poland – reference category).

What factors influence respondents' trust and distrust in parliament?

Respondents with the following features are **more likely** to have higher levels of **trust** in parliament:
- Respondents who are female (as opposed to respondents who are male);
- Respondents who have more generalized trust in other people;
- Respondents who have a more positive attitude towards stricter government regulation of the economy;
- Respondents who reside in Belgium, Denmark, Germany, the Netherlands, Norway, and Switzerland (compared to respondents residing in Poland – reference category).

Distrust in parliament is **more likely** to be high for respondents:
- Working in the financial sector and the food sector (compared to respondents working with data protection – reference category);
- Working at interest groups (compared to respondents working at organisations classified as public actors – reference category);
- Residing in Germany, Spain, and Switzerland (compared to respondents residing in Poland – reference category).

Distrust in parliament is **less likely** to be high for respondents:
- Who are female (as opposed to male)
- Residing in Denmark and Norway (compared to respondents residing in Poland – reference category).

What factors influence respondents' trust and distrust in certification and accreditation bodies?

Respondents with the following features are **more likely** to report higher levels of **trust** in certification and accreditation bodies:

- Respondents who are younger;
- Respondents who have more generalized trust in other people;
- Respondents from Denmark and Norway (compared to respondents residing in Poland – reference category);

Respondents with the following features are **less likely** to report higher levels of **trust** in certification and accreditation bodies:

- Respondents working in the finance sector and the food sector (compared to respondents working with data protection – reference category).

Respondents are **more likely** to report higher levels of **distrust** in certification and accreditation bodies when:

- They are older;
- Work at an interest group (compared to respondents working at organisations classified as 'public actors' – reference category);
- Work in the financial sector (compared to working with data protection – reference category);
- Reside in Belgium, Germany, Spain, or Switzerland (compared respondents to residing in Poland – reference category).

Respondents are **less likely** to report higher levels of **distrust** in certification and accreditation bodies when:

- They have higher levels of education
- Reside in Israel (compared respondents to residing in Poland – reference category).

What factors influence respondents' trust and distrust in courts?

With regards to courts, respondents with the following features are **more likely** to report higher levels of **trust**:

- Respondents who have more generalized trust in other people;
- Respondents residing in Belgium, Denmark, Germany, the Netherlands, Norway, or Switzerland (compared to respondents residing in Poland – reference category).

With regards to **courts**, respondents with the following features are **less likely** to report higher levels of **trust**:

- Respondents working in the food sector (compared to those working with data protection).
- Respondents residing in Spain (compared to respondents from Poland – reference category).

Respondents are **more likely** to report higher levels of **distrust** in courts when they:

- Are older;
- Have a more positive attitude towards stricter government regulation of the economy
- Work at regulated organisations and interest groups (compared to respondents working at organisations classified as 'public actors' – reference category);
- Reside in Spain (compared respondents to residing in Poland - reference category).

Respondents are **more likely** to report higher levels of **distrust** in courts when they:

- Have a higher level of education;
- Reside in Denmark, Israel, the Netherlands, and Norway (compared respondents to residing in Poland - reference category).

5.2 Trust in supervisory actors

In the survey, we measured trust in supervisory actors in the regulatory regime. Supervisory actors are the most important actors in a country dealing with supervision and enforcement. The country teams involved in the TiGRE project were responsible for the identification of their country's supervisory actors. In most cases, supervisory actors are regulatory agencies within the respective sector. Hence, the survey covered regulatory agencies several times, as this actor type was also included in other parts of the survey (see section 5.1.3). Because of their importance in regulatory governance, we use a three-dimensional measurement for trust in regulatory agencies.

Our multidimensional measurement of trust, which is utilized for the questions on supervisory actors, examines three important components of trust: integrity, benevolence, and ability [1]. Integrity is the expectation that the other party will adhere to principles that are deemed as good and acceptable by the trustor. This is measured using the phrase, "follow sound principles when interacting with others." Benevolence is the expectation that the other party cares about the trustor's interests and needs. This is measured using the phrase, "take the interests of organisations like mine into account." Finally, ability is the expectations that the other party has the competence to successfully complete its tasks. This is measured using the phrase, "perform its tasks in a very competent way." For this battery question, a scale ranging from '0' to '10' was used in line with OECD recommendations (OECD, 2017). The question was as follows:

Q: The [actor name][2] is an important supervisory institution [sector][3]. A main task of [actor name] is therefore to assess compliance with existing rules [sector].

On a scale from 0 never to 10 always, to what degree do you think [actor name] will…

- …follow sound principles when interacting with others
- …take the interests of organisations like mine into account
- …perform its tasks in a very competent way

Respondents received the abovementioned question for all supervisory actors within the regulatory regime in their given sector and country. Respondents *never* received questions about their own organisations and only received the question if they responded positively to a preceding question asking about their familiarity with the given actor. Respondents who worked at national supervisory institutions also received a question about the relevant EU level supervisory actor.

[1] More information on this measurement is included in the non-public technical report on the survey (Gaspers & Bach, 2021).

[2] The name of the relevant supervisory institution was inserted here.

[3] The name of the respondent's sector was inserted here: "for data protection"; "in the financial sector"; "in the food sector".

5.2.1 Exploring the data

The figures in this section depict the means for the questions on trust in supervisory actors.

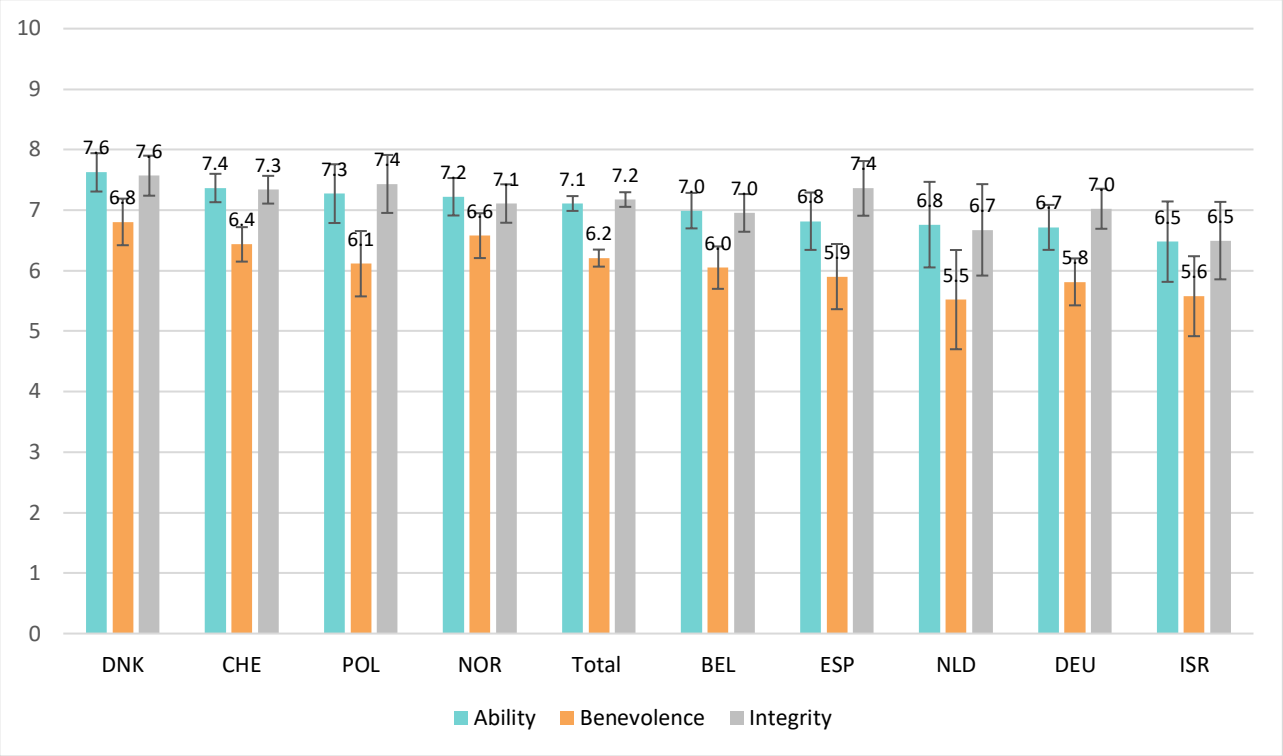

Figure 44: ABI trust in supervisory actors across countries and sectors (means, N=1078-1082)

Figure 44 depicts means for ability, benevolence, and integrity across the TiGRE countries. Data from all sectors is included in this analysis. The observations are ordered from the highest mean to the lowest mean by the variable 'Ability'.

There is little variation in the means for ability, benevolence, and integrity across countries. With regards to ability, Denmark has the highest mean (mean=7.6) and Israel the lowest mean (mean=6.5). The difference between Denmark and Israel is significant. With regards to benevolence, Denmark has the highest mean (mean=6.8) and the Netherlands the lowest mean (mean=5.5). There is a significant difference between Denmark and Germany and Israel, which have relatively low means. Finally, with regards to integrity, again, Denmark has the highest mean (mean=7.6) and Israel the lowest mean (mean=6.5). This difference is significant.

The means for ability, benevolence, and integrity are greater than five. This indicates that (1) respondents trust that these actors will perform their tasks in a very competent way (ability), (2) take the interests of organisations like theirs into account (benevolence), and (3) follow sound principles when interacting with others (integrity). While all the means are greater than five, the total means for ability and integrity are 7.1 and 7.2, respectively, whereas the total mean for benevolence is 6.2. Thus, respondents are much more likely to trust that supervisory institutions follow sound principles with interacting with others and perform their tasks in a competent way than they are to trust that supervisory institutions take the interests of organisations like theirs into account.

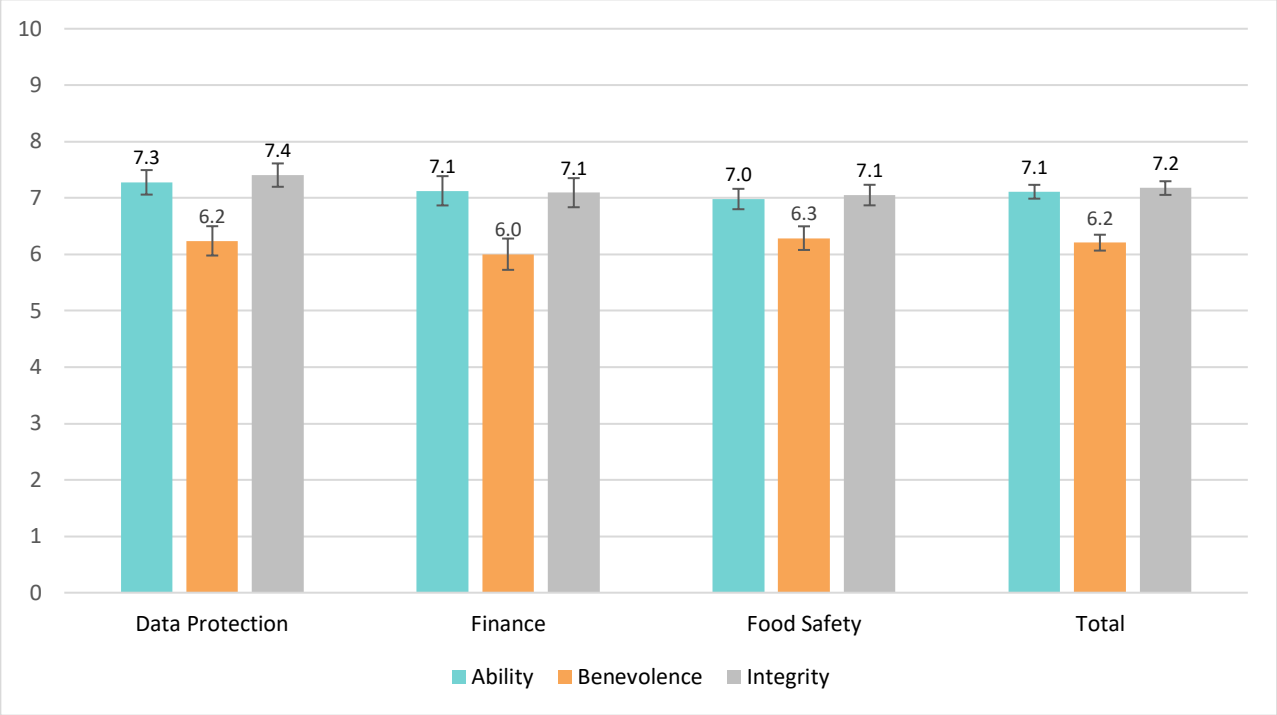

Figure 45: ABI trust in supervisory actors across sectors (means, N=1078-1082)

Figure 45 depicts the means for ability, benevolence, and integrity across the three sectors studied in the project: data protection, finance, and food safety. Data from all countries is included in this analysis.

The means for ability, benevolence, and integrity are fairly similar across the three sectors. Figure 45 shows that the mean for ability slightly higher in data protection (mean=7.3) than in finance (mean=7.1) and in food safety (mean=7.0). It also shows that the mean for benevolence is slightly higher in food safety (mean=6.3) than in data protection (mean=6.2) and finance (mean=6.0). Finally, the figure shows that the mean for integrity is slightly higher in data protection (mean=7.4) than in finance and food safety, which have the same mean of 7.1. However, these differences are not significant.

Looking at the data by sector, we see a similar pattern to that in Figure 44. In Figure 45, the total mean for benevolence is lower than the means for ability and integrity. This indicates that respondents are much more likely to trust that supervisory institutions follow sound principles when interacting with others and perform their tasks in a competent way than they are to trust that supervisory institutions take the interests of organisations like theirs into account.

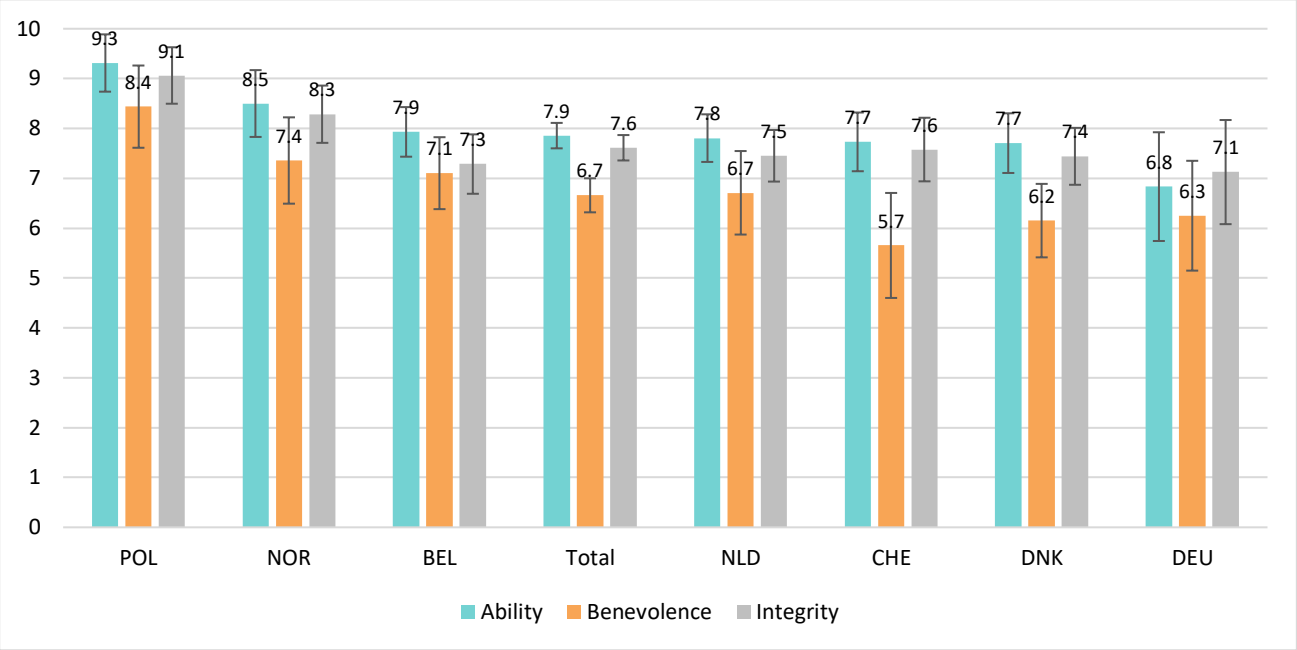

Figure 46: ABI trust in supervisory actors at the EU level across sectors and countries (means, N=173-174)

Figure 46 depicts means for ability, benevolence, and integrity for EU level (as opposed to national level) supervisory actors. Data from all sectors is included in this analysis, but Israel and Spain are not included in this analysis. This is because there was very little data on the EU level core actors in these countries. Only national core actors received this question, and Israel and Spain had few national core actors who responded to the survey. The observations are ordered from the highest mean to the lowest mean by the variable, 'Ability'.

There are significant differences in means between countries. With regards to ability, Poland has the highest mean (mean=9.3) and Germany the lowest mean (mean=6.8). This difference is significant. With regards to benevolence, Poland has the highest mean (mean=8.4) and Switzerland the lowest mean (mean=5.7). Poland differs significantly from Switzerland, Denmark, and Germany. Finally, with regards to integrity, Poland, once again, has the highest mean (mean=9.1). Germany has the lowest mean (mean=7.1). Poland differs significantly from all countries except Norway.

Once again, the total mean for benevolence is lower than the means for ability and integrity. This indicates that respondents are much more likely to trust that supervisory institutions follow sound principles when interacting with others and perform their tasks in a competent way than they are to trust that supervisory institutions take the interests of organisations like theirs into account.

5.2.2 Discussion of descriptive findings

At the national level, as depicted in Figure 44 and Figure 45, there is little variation in means between countries and sectors, but there is variation between the three trust measurements: ability, benevolence, and integrity. In all countries and in all sectors, means for benevolence are significantly lower than means for ability and integrity. This indicates that respondents are more likely to trust that supervisory actors (1) follow sound principles when interacting with others and (2) perform their tasks in a very competent way than they are to trust that supervisory actors take the interests of organisations like theirs into account.

As to EU level supervisory actors, as depicted in Figure 46, there is a bit more variation between countries. However, the same pattern, namely that means for benevolence are lower than means for ability and integrity is present at the EU level. Interestingly, respondents in Poland have very high trust in EU supervisory actors (see Figure 46), but relatively low trust in national actors (see figures 38 & 40-43).

Means for ability, benevolence, and integrity are slightly higher at the EU level than at the national level. At the EU level, the total mean for ability is 7.9, the total mean for benevolence is 6.7, and the total mean for integrity is 7.6. At the national level, the total mean for ability is 7.1, the total mean for benevolence is 6.2, and the total mean for integrity is 7.2.

5.2.3 What determines perceptions of ability, benevolence and integrity regarding supervisory actors?

Using a number of relevant variables, we conducted analyses using OLS (see section 1.3 for more details) in order to explain respondents' perceptions of trust in supervisory actors in the regulatory regime.

What are the factors that influence respondents' perceptions of ability (competence) of a core supervisory body in the regulatory regime?

Respondents with the following attributes are **more likely** to have a positive perception of the ability of the supervisory actor:

- Respondents who have more generalized trust in other people;
- Respondents who have a more positive attitude towards stricter government regulation of the economy.

Respondents with the following attributes are **less likely** to have a positive perception of the ability of the supervisory actor:

- Respondents who hold a leadership position;
- Respondents working in the financial and food sectors (compared to respondents working with data protection – reference category);
- Respondents who work at regulated organisations and interest groups compared to respondents who work at organisations classified as 'public actors' – reference category);
- Respondents who reside in Belgium, the Netherlands, Germany, and Israel (compared with respondents who reside in Poland – reference category).

What are the factors that influence respondents' perceptions of benevolence of a core supervisory body in the regulatory regime?

Respondents with the following attributes are **more likely** to have a positive perception of the benevolence of the supervisory actor:

- Respondents with higher levels of education;
- Respondents with more generalized trust in other people;
- Respondents with a more positive attitude towards stricter government regulation of the economy;

Respondents with the following attributes are **less likely** to have a positive perception of the benevolence of the supervisory actor:

- Respondents working at organisations classified as regulatory intermediaries, regulated organisations, and interest groups compared to respondents working at organisations classified as 'public actors' – reference category;
- Respondents working in the food sector compared to respondents working with data protection – reference category;
- Respondents who reside in Germany compared to respondents who reside in Poland – reference category.

What are the factors that influence respondents' perceptions of integrity of a core supervisory body in the regulatory regime?

Respondents with the following attributes are **more likely** to have a positive perception of the integrity of the supervisory actor:

- Respondents who have more generalized trust in other people;

- Respondents who have a more positive attitude towards stricter government regulation of the economy.

Respondents with the following attributes are **less likely** to have a positive perception of the integrity of the supervisory actor:

- Respondents who reside in Belgium, Germany, Israel, the Netherlands, or Norway (compared to respondents residing in Poland – reference category);
- Respondents who work at a regulated organisation or interest group (compared to working at an organisation classified as a 'public actor' – reference category).
- Respondents who work in the financial sector and food sector (compared to working with data protection – reference category).

6. Analysing the Experiment

The survey included a vignette experiment. Experimental research in the social sciences, as done in TiGRE, allows not only for the gathering of new insights from the experimental design, but also for the triangulation of the survey results with those of the experiment. Thus, the development of the experiment was a key task in WP2. The first purpose of the experiment was to assess whether levels of trust and distrust in a regulatory body depend on whether the regulatory body is located at the EU level or the national level. The second purpose of the experiment is to assess whether trust and distrust can be considered as analytically and empirically distinct concepts.

For the experiment, respondents were given a vignette, which described a hypothetical situation regarding an agency for energy regulation at either the EU level or the national level. The vignette showcased either performance improvement or continued low performance (Annex 1 includes the vignette texts). After reading the vignette, respondents were posed two questions: one question asked about their trust in the regulator and one question asked about their distrust in the regulator. The questions are:

Q1 (general trust): In your opinion, can energy companies trust the regulatory agency to ensure sufficient energy supply and fair prices for citizens?
Scale=0-10, where '0' is 'Cannot trust at all' and '10' is 'Can trust completely'

Q2 (general distrust): In your opinion, should energy companies be watchful that the regulatory agency's actions do not negatively impact them?
Scale=0-10, where '0' is 'Not watchful at all' and '10' is 'Very watchful'

When analysing the experiment, data are reported as means plus/minus standard deviation, unless otherwise stated. Overall, we treated the ordinal variables as metric. To detect causal links regarding the drivers of trust and distrust, it may be necessary to – in further analyses – test different models. However, at this stage and given the nature of the analysis, ordinal variables are treated as metric.

Based on the theoretical background as developed in previous work packages as well as in WP2, the following working hypotheses are tested:

H0: the population means of the two groups (e.g. EU and national) are equal (i.e. $\mu 1 = \mu 2$)

H_A: the population means of the two groups (e.g. EU and national) are not equal (i.e. $\mu 1 \neq \mu 2$)

The experiment has two dimensions: i) the level of the regulator (national and EU) and ii) performance of the regulator (improvement and no improvement). It also has two distinct independent variables (trust and distrust levels). As the experiment has a factorial design (2x2) with two dimensions as well as two distinct independent variables (trust and distrust levels), several independent-sample t-tests were run, which consider the different treatment groups and the different independent variables.

6.1 Analysis based on the level of the regulator (EU and national)

The underlying question is whether there are differences in trust and distrust levels based on the level of the regulator. First, **trust** levels analysed for respondents who received the "no performance improvement" treatment. The underlying question is: Do respondents' levels of trust in a regulatory body that has performed poorly and shown **no improvement** differ based on the **level of the regulator** (EU or national). An independent-sample t-test was run to determine whether there are differences in trust levels based on the level of the regulator (EU or national) when the regulator showed no performance improvement.[1] There are

[1] There was homogeneity of variances, as assessed by Levene's test for equality of variances (p=.335).

282 responses from respondents who received a vignette where the regulator was at the national level and 306 responses from respondents who received a vignette where the regulator was at the EU level. Trust levels are slightly higher when regulation took place at the national level (5.18±1.97) compared to the EU level (5.04±1.90), a statistically insignificant difference of 0.142 (95% CI, -0.171 to 0.455), t(586)=-0.890, p=.374.

Second, **trust** levels are analysed for all respondents who received the "performance improvement" treatment. The underlying question is: Do respondents' levels of trust in a regulatory body that has performed well and shown **improvement** differ based on the **level of the regulator** (EU or national). An independent-sample t-test was run to determine if there are differences in trust levels based on the level of the regulator (EU or national) when the regulator showed performance improvement. There are 312 responses from respondents who received a vignette where the regulator was at the national level and 283 responses from respondents who received a vignette where the regulator was at the EU level. Trust levels are slightly higher when regulation took place at the national level (6.34±1.96) compared to the EU level (6.21±1.85), a statistically insignificant difference of 0.134 (95% CI, -0.173 to 0.442), t(593)=-0.662, p=.391.

Third, **distrust**[1] levels are analysed for all respondents who received the "no performance improvement" treatment. The underlying question is: Do respondents' levels of distrust in a regulatory body that has performed poorly and shown **no improvement** differ based on the **level of the regulator** (EU or national). An independent-sample t-test was run to determine whether there are differences in trust levels based on the level of the regulator (EU or national) when the regulator showed no performance improvement. There are 231 responses from respondents who received a vignette where the regulator was at the national level and 257 responses from respondents who received a vignette where the regulator was at the EU level. Distrust levels were slightly higher when regulation took place at the national level (6.98±2.16) compared to the EU level (6.87±2.01), a statistically insignificant difference of 0.115 (95% CI, -0.255 to 0.485), t(487)=-0.610, p=.542.

Fourth, **distrust** levels are analysed for all respondents that received "performance improvement" treatment. The underlying question is: Do respondents' levels of distrust in a regulatory body that has performed well and shown **improvement** differ based on the **level of the regulator** (EU or national). An independent-sample t-test was run to determine if there are differences in distrust levels based on the level of the regulator (EU or national) when the regulator showed performance improvement. There are 253 responses from respondents who received a vignette where the regulator was at the national level and 232 responses from respondents who received a vignette where the regulator was at the EU level. Distrust levels were slightly higher when regulation took place at EU level (6.46±2.01) compared to the national level (6.42±2.02), a statistically insignificant difference of 0.042 (95% CI, -0.318 to 0.402), t(483)=0.229, p=.819.

6.2 Analysis based on performance of the regulatory body (improvement and no improvement)

The underlying question is whether there are differences in trust and distrust levels based on the performance of the regulatory agency. First, **trust** levels are analysed for respondents who received the "EU" treatment. The underlying question is: Do respondents' levels of trust in a regulatory body that is installed at the EU level differ based on its performance (improvement or no improvement). An independent-sample t-test was run to determine whether there are differences in trust levels based on the regulator's performance (improvement or no improvement) when the regulator is installed at the EU level. There are 306 responses from respondents who received a vignette where the regulatory body has performed poorly and shown **no improvement** and there are 283 responses from respondents who received a vignette where the regulatory body has performed poorly and shown **improvement.** Trust levels are higher when the regulator shows

[1] The sample used in the distrust analysis is slightly smaller due to the exclusion of the Swiss respondents, who did not receive a correct question following a translation error.

improvement (6.21±1.85) than when the regulator shows no improvement (5.04±1.90), a statistically significant difference of 1.12 (95% CI, 0.863 to 1.47), t(586)=7.549, p=.0005.

Second, **trust** levels are analysed for respondents who received the "national" treatment. The underlying question is: Do respondents' levels of trust in a regulatory body that is installed at the national level differ based on its performance (improvement or no improvement). An independent-sample t-test was run to determine whether there are differences in trust levels based on the regulator's performance (improvement or no improvement) when the regulator is installed at the national level. There are 282 responses from respondents who received a vignette where the regulatory body has performed poorly and shown **no improvement** and 312 responses from respondents who received a vignette where the regulatory body has performed poorly and shown **improvement.** Trust levels are higher when the regulator shows improvement (6.34±1.96) than when the regulator shows no improvement (5.18±1.97), a statistically significant difference of 1.16 (95% CI, 0.842 to 1.48), t(586)=7.177, p=.0005.

Third, **distrust** levels are analysed for respondents that received the "EU" treatment. The underlying question is: Do respondents' levels of distrust in a regulatory body that is installed at the EU level differ based on its performance (improvement or no improvement). An independent-sample t-test was run to determine whether there are differences in distrust levels based on the regulator's performance (improvement or no improvement) when the regulator is installed at the EU level. There are 257 responses from respondents who received a vignette where the regulatory body has performed poorly and shown **no improvement** and 232 responses from respondents who received a vignette where the regulatory body has performed poorly and shown **improvement.** Distrust levels are lower when the regulator shows improvement (6.46±2.01) than when the regulator shows no improvement (6.87±2.01), a statistically significant difference of 0.41 (95% CI, 0.053 to 0.768), t(487)=2.258, p=.024.

Fourth, **distrust** levels are analysed for respondents that received the "national" treatment. The underlying question is: Do respondents' levels of distrust in a regulatory agency that is installed at the national level differ based on its performance (improvement or no improvement). An independent-sample t-test was run to determine whether there are differences in distrust levels based on the regulator's performance (improvement or no improvement) when the regulator is installed at the national level. There are 231 responses from respondents who received a vignette where the regulatory body has performed poorly and shown **no improvement** and 253 responses from respondents who received a vignette where the regulatory body has performed poorly and shown **improvement.** Distrust levels are lower when the regulator shows improvement (6.42±2.02) than when the regulator shows no improvement (6.98±2.16), a statistically significant difference of 0.57 (95% CI, 0.195 to 0.940), t(482)=2.991, p=.003.

6.3 Discussion of findings

Figure 47 and Figure 48 summarize the differences in mean values according to the four treatment groups. Differences based on the regulatory level are i) very small and ii) not significant. Accordingly, one cannot reject null hypotheses. There are no differences in either trust nor in distrust levels based on the level of the regulator.

Differences based on the performance level are i) relatively large and ii) significant. Accordingly, one can reject null hypotheses and accept the alternative ones. There are significant differences in both trust and distrust levels based on the performance shown by the regulator.

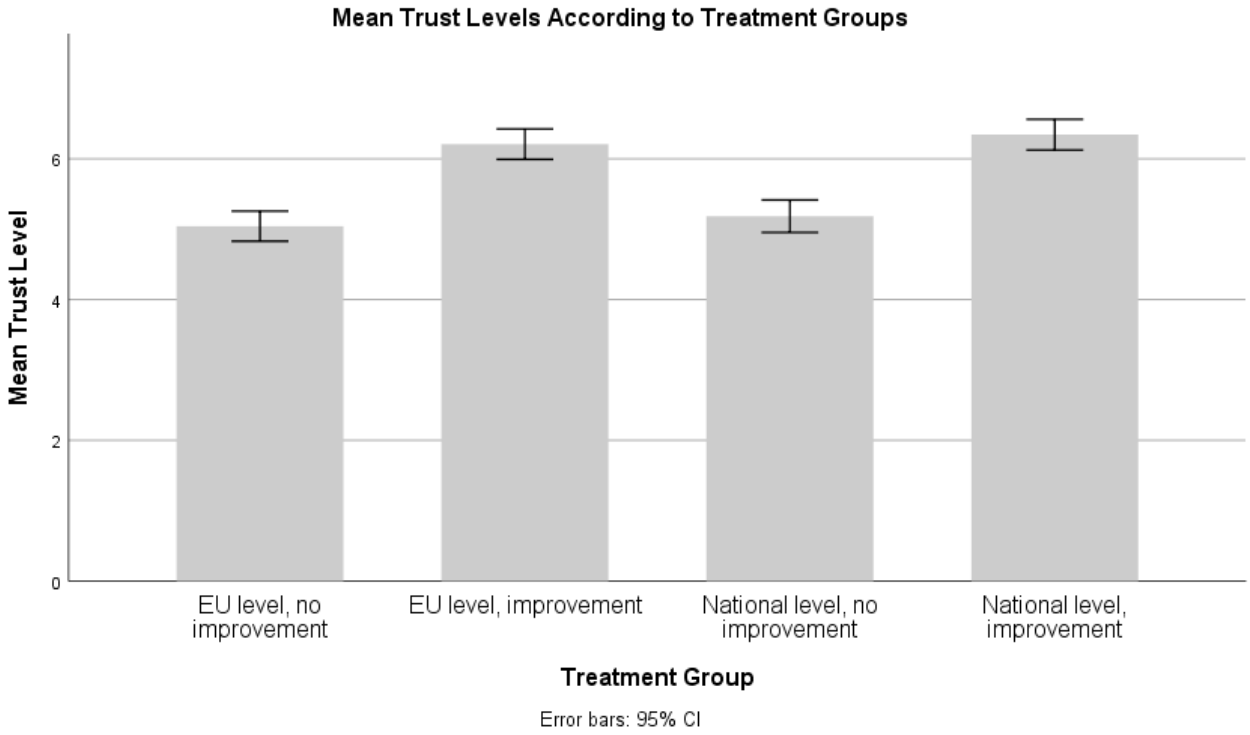

Figure 47: Mean trust levels according to treatment groups

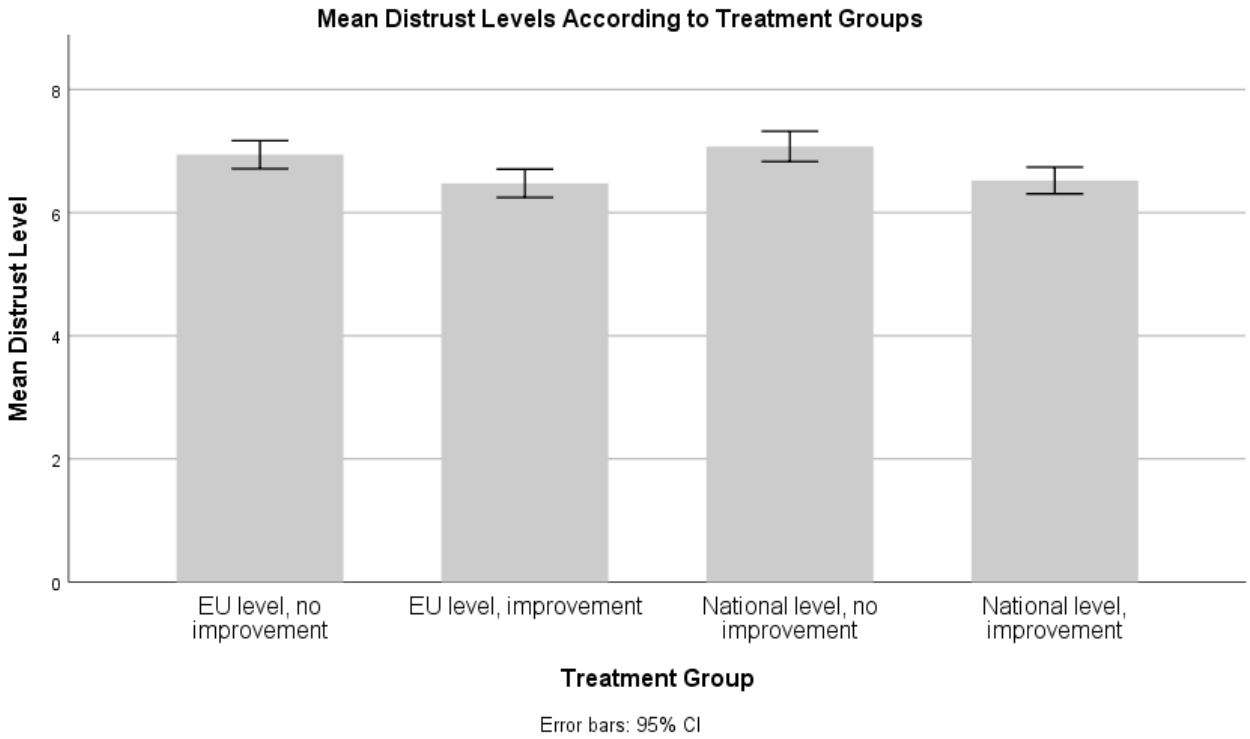

Figure 48: Mean distrust levels according to treatment groups

Overall, delivering empirical evidence from an innovative experimental design in line with the aims of WP2, we were able to show that the level of trust and distrust do not differ on the level of the regulator, but differ based on the performance of the regulatory body. These findings may contradict, to some extent, common

knowledge – which often emphasizes the role of the level (national vs. EU) – and leaves space for further research. In particular, when it comes to shared responsibilities or the transfer of responsibilities from the national to the EU level, this finding may be relevant. Furthermore, in particular, the prominent role of performance has important practical implications; performance matters for trust and distrust and communication of performance information are pivotal for regulatory bodies.

7. Conclusion

In this report, we present the preliminary results of the TiGRE project survey on trust and distrust in European regulatory governance. The survey, conducted in nine countries and funded by the European Union's Horizon 2020 research and innovation program, explores experts' perceptions of trust and distrust in regulatory governance in three sectors: data protection, finance, and food safety. The current report builds on the responses collected from respondents in the nine countries (Belgium, Denmark, Germany, Israel, the Netherlands, Norway, Poland, Spain, Switzerland). The survey respondents are sector experts, including public actors like ministries and agencies, regulatory intermediaries, as well as interest groups and private business.

The results presented in this report, although preliminary, highlight key elements regarding trust and distrust in European regulatory governance. We now briefly highlight some of our main findings, presented in sections two through six of this report.

First, respondents' **confidence in the regulation of their sector** is high. On average, respondents are confident, albeit to varying degrees, in the regulation of their sector. Moreover, respondents are on average *more* confident in the regulation of their sector at the time of responding to the survey (November 2020 - March 2021) than they were five years ago. While respondents are on average confident in the regulation of their sector, confidence varies across countries and sectors. On average respondents are less confident in the regulation of personal data than in the regulation of finance or food.

Second, respondents' **perceptions of compliance** with regulation differ based on the sector in which the respondent works, as well as subsector. We find a higher degree of perceived compliance with regulation in the food and financial sectors than with data protection regulation. Moreover, we find variance within sectors. For instance, respondents working with data protection on average perceive hospitals to be more compliant with data protection regulations than internet providers.

Third, respondents' **perceptions of regulatory consent** differ based on whether they are asked about consent with the content of regulations or the enforcement process of regulations. On average, respondents perceive the content of regulation to be just fine as it is or slightly too strict, whereas they perceive the enforcement of regulations to be either just fine as it is or slightly too loose. We consider this observation as a regulatory paradox which requires further analysis. Moreover, there are no consistent cross-country and cross-sector patterns for respondents' **perceptions of the legitimacy of the enforcement process.** Instead, we observe that legitimacy perceptions for a specific sector may be relatively high in one country and relatively low in another, which calls for further exploration of country and sector specific explanations.

Fourth, there are interesting differences regarding **respondents' trust and distrust in important actors**, namely national regulatory agencies, EU regulatory bodies, ministries, parliament, and certification and accreditation bodies. While respondents trust the aforementioned institutions, they also feel like they have to be 'watchful' to ensure that the actions of these institutions do not negatively impact their institutions. Moreover, average levels of distrust do not consistently increase with average levels of trust. Thus, distrust does not appear to be the exact opposite of trust. Of the aforementioned institutions, parliament stands out; trust is always lowest and distrust is always highest in parliament.

Fifth, there are also interesting findings regarding **respondents' trust and distrust in supervisory actors**, such as regulatory agencies**.** For supervisory actors, the survey included a more fine-grained, multidimensional measurement of trust and distrust, focusing on supervisory bodies' ability, benevolence and integrity. Respondents are more likely to trust that supervisory actors follow sound principles ("integrity") when interacting with others and perform their tasks in a very competent way ("ability") than they are to trust that supervisory actors take the interests of organisations like theirs into account ("benevolence"). In other words, respondents score supervisory actors higher on the measures of integrity and ability than on the measure of benevolence.

Sixth, while this report provides a general overview of the relevance of sectoral and country patterns for understanding regulatory governance in general and trust and distrust in regulatory regimes in particular, it also demonstrates the need for further investigation. This report provides indications that respondents from some countries quite consistently score higher on various variables than respondents from other countries. Those patterns resemble existing research on trust in institutions, but they are not identical. Moreover, we found that within-country differences across sectors are not consistent. For instance, the relative scores for regime performance across sectors look very differently across countries. This points towards the need to further explore country-specific determinants of regulatory governance.

Finally, respondents took part in a **survey experiment to assess whether levels of trust and distrust in a regulatory body depend on whether the regulatory body is located at the EU level or the national level and to assess whether or not the regulator's performance affects respondents' trust and distrust.** There are no differences in either trust nor in distrust levels based on the level of the regulator, but there are significant differences in both trust and distrust levels based on the performance shown by the regulator. In other words, whether a regulatory body is located at the EU or national level does not affect perceived levels of trust *per se*. Again, further analyses are needed to assess the relevance of additional explanatory variables.

In conclusion, this report highlights several important preliminary findings, as demonstrated above. Importantly, the analyses of the survey data and the vignette experiment, presented in this report, provide important information regarding the determinants of patterns, variations, and dynamics of trust and distrust between stakeholders at different levels within the regulatory regimes. The preliminary findings presented and discussed in this report will be investigated by other work packages (i.e. WP3) of the TiGRE project and in future research publications.

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Annex

exper_treatment 1

The agency for energy regulation at the European Union level has the important function of ensuring sufficient energy supply and fair prices for citizens. Its main task is to foster a fully integrated and well-functioning energy market inside the European Union. This includes the supervision of the energy market and solving conflicts among national energy regulators.

Following a number of complaints by companies in the energy sector, the agency was evaluated by an independent expert committee two years ago. The evaluation exposed several problems: the agency had difficulties with recruiting highly qualified staff; it failed to comply with important rules for procurement; and it was criticized for an overly strict application of rules that didn't take into account different companies' characteristics. At the time, the agency leadership acknowledged these problems and promised to tackle them within two years.

Recently, a follow-up evaluation showed that the problems inside the agency persisted. This negative assessment was confirmed in a survey conducted among key stakeholders of the agency. The evaluation triggered an ongoing discussion about a major reform of the agency.

exper_treatment 2

The agency for energy regulation at the European Union level has the important function of ensuring sufficient energy supply and fair prices for citizens. Its main task is to foster a fully integrated and well-functioning energy market inside the European Union. This includes the supervision of the energy market and solving conflicts among national energy regulators.

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Recently, a follow-up evaluation showed that the problems inside the agency had been successfully addressed. This was also confirmed in a survey conducted among key stakeholders of the agency. The evaluation showed that the agency had successfully implemented a major reform.

exper_treatment 3

The national agency for energy regulation has the important function of ensuring sufficient energy supply and fair prices for citizens. Its main task is to foster a well-functioning national energy market in which multiple companies compete for customers. This includes the supervision of energy companies and solving conflicts concerning the extension of energy grids.

Following a number of complaints by companies in the energy sector, the agency was evaluated by an independent expert committee two years ago. The evaluation exposed several problems: the agency had difficulties with recruiting highly qualified staff; it failed to comply with important rules for procurement; and it was criticized for an overly strict application of rules that didn't take into account different companies' characteristics. At the time, the agency leadership acknowledged these problems and promised to tackle them within two years.

Recently, a follow-up evaluation showed that the problems inside the agency persisted. This negative assessment was confirmed in a survey conducted among key stakeholders of the agency. The evaluation triggered an ongoing discussion about a major reform of the agency.

exper_treatment 4

The national agency for energy regulation has the important function of ensuring sufficient energy supply and fair prices for citizens. Its main task is to foster a well-functioning national energy market in which multiple companies compete for customers. This includes the supervision of energy companies and solving conflicts concerning the extension of energy grids.

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