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Autumn 2011

EUROPE 2020

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http://ec.europa.eu/public_opinion/index_en.htm

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Standard Eurobarometer 76 / Autumn 2011 – TNS Opinion & Social

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Conducted by TNS Opinion & Social at the request of the
European Commission - Directorate-General for Communication

Survey co-ordinated by the European Commission -
Directorate-General for Communication

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INTRODUCTION

The Europe 2020 strategy, launched in March 2010 by the European Commission, aims to overcome the current economic and financial crisis and to prepare the European economy to meet the main issues and challenges of the decade 2010-2020¹. This strategy therefore provides a framework within which to implement several initiatives intended to encourage and strengthen the conditions for innovative, sustainable and inclusive European growth.

Since the Standard Eurobarometer of Spring 2010 (EB73), European perceptions of the Europe 2020 strategy have been measured regularly. So it is now possible to begin to get some perspective on the various indicators and to analyse the evolutions of European public opinion in this respect with some precision.

In this Autumn 2011 Standard Eurobarometer (EB76), public opinion of the Europe 2020 strategy is approached through four indicators. Firstly, Europeans are asked about the importance they give to the seven flagship initiatives set out by the European Commission. Secondly, they are asked how realistic they think the targets are. They are next asked to identify the priorities among 21 measures relating to the seven flagship initiatives. Finally, once aware of the Europe 2020 strategy targets and proposals, Europeans are asked to say whether they think that the European Union is taking the right or the wrong direction in order to emerge from the crisis and meet the new global challenges.

The full report of the autumn 2011 Standard Eurobarometer consists of four volumes. The first volume analyses the results of the historical indicators of the Standard Eurobarometer. Three other volumes cover the state of European public opinion on the financial and economic crisis, the Europe 2020 strategy, and media habits in the European Union. The current volume examines the Europe 2020 strategy.

The general analysis, as well as the socio-demographic analyses, is based on the average of the 27 Member States. This average is weighted to reflect the actual population of each Member State. The averages for previous years represent the results obtained in all the Member States which made up the Union at the time when the survey was conducted.

¹ http://ec.europa.eu/europe2020/index_en.htm

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The methodology used is that of the Eurobarometer surveys of the Directorate-General Communication ('Research and Speechwriting' Unit). A technical note concerning the interviews carried out by the institutes of the TNS Opinion & Social network is appended to this report. It specifies the interview methodology as well as the confidence intervals².

The Eurobarometer web site can be consulted at the following address:

http://ec.europa.eu/public_opinion/index_en.htm

*We wish to thank the people throughout Europe who have given their time
to take part in this survey. Without their active participation,
this survey would not have been possible*

² The results tables are in the appendix. Please note that the percentage totals in the tables can exceed 100% where the interviewee could choose more than one response to a question.

The abbreviations used in this report and their corresponding meanings are as follows:

ABBREVIATIONS

| | |
|---------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| EU27 | European Union – 27 Member States |
| EU15 | 'EU15 countries'* |
| NMS12 | 'NMS12 countries'** |
| | Eurozone Belgium, Germany, Greece, Spain, France, Ireland, Italy, Luxembourg, Malta, The Netherlands, Austria, Portugal, Slovakia, Slovenia, Finland, Estonia, Republic of Cyprus |
| | Outside of Eurozone Bulgaria, Czech Republic, Denmark, Lithuania, Latvia, Hungary, Poland, Romania, Sweden, United Kingdom |
| DK/NA | Don't know/No answer |
| BE | Belgium |
| BG | Bulgaria |
| CZ | Czech Republic |
| DK | Denmark |
| DE | Germany |
| EE | Estonia |
| EL | Greece |
| ES | Spain |
| FR | France |
| IE | Ireland |
| IT | Italy |
| CY | Republic of Cyprus*** |
| CY(tcc) | Zone not controlled by the government of the Republic of Cyprus |
| LT | Lithuania |
| LV | Latvia |
| LU | Luxembourg |
| HU | Hungary |
| MT | Malta |
| NL | The Netherlands |
| AT | Austria |
| PL | Poland |
| PT | Portugal |
| RO | Romania |
| SI | Slovenia |
| SK | Slovakia |
| FI | Finland |
| SE | Sweden |
| UK | United Kingdom |
| HR | Croatia |
| TR | Turkey |
| MK | Former Yugoslav Republic of Macedonia**** |
| IS | Iceland |
| ME | Montenegro |

* EU15 refers to the 15 countries forming the European Union before the enlargements of 2004 and 2007: Belgium, Denmark, Germany, Greece, Spain, France, Ireland, Italy, Luxembourg, The Netherlands, Austria, Portugal, Finland, Sweden and the United Kingdom.

** The NMS12 are the 12 'new Member States' which joined the European Union during the 2004 and 2007 enlargements. These are Bulgaria, the Czech Republic, Estonia, the Republic of Cyprus, Lithuania, Latvia, Hungary, Malta, Poland, Romania, Slovenia and Slovakia.

*** Cyprus as a whole is one of the 27 European Union Member States. However, the 'acquis communautaire' has been suspended in the part of the country which is not controlled by the government of the Republic of Cyprus. For practical reasons, only the interviews carried out in the part of the country controlled by the government of the Republic of Cyprus are included in the 'CY' category and in the EU27 average. The interviews carried out in the part of the country that is not controlled by the government of the Republic of Cyprus are included under 'CY (tcc)' [tcc: *Turkish Cypriot Community - Communauté chypriote turque*].

**** Provisional abbreviation which in no way prejudices the definitive name of this country, which will be agreed once the current negotiations at the United Nations have been completed.

1. THE PERCEIVED IMPORTANCE OF THE EUROPEAN UNION'S EUROPE 2020 INITIATIVES

- Europeans continue to put social and environmental initiatives first -

In this survey, interviewees were first asked to assign a level of importance to the seven initiatives set out by the European Union for the Europe 2020 strategy³. In order to do so, they had to give a score between 1 and 10 to each initiative, where 1 meant that they considered it 'not at all important' and 10 'very important'. Then the percentages were aggregated into three response categories: 'important' for scores 7 to 10, 'quite important' for 5 and 6, and 'not important' for 1 to 4. The same question was asked in the spring 2011 Standard Eurobarometer (EB75) and the spring 2010 Standard Eurobarometer (EB73).

The main lesson lies in the great stability of assessments of these seven flagship initiatives. As in the preceding Eurobarometer, **six of the seven initiatives are considered important by an absolute majority of Europeans**. Social and environmental measures continue to top the list of initiatives regarded as the most important, ahead of education measures and actions which aim to support the competitiveness of the European economy and innovation. **In the responses on the importance of these initiatives, public opinion expresses, and indeed confirms, its expectation that the European Union will take strong action in order to emerge from the crisis.**

In more detail, over three-quarters of Europeans say that it is important to 'help the poor and socially excluded and to enable them to play an active part in society' (79%, no change), 'to modernise labour markets with a view to raising employment levels' (78%, -1 point) and 'to support an economy which uses fewer natural resources and gives out fewer greenhouse gases' (75%, -1 point).

Three initiatives attract the support of between 60% and 70% of respondents. These are 'enhance the quality and appeal of the EU's higher education system' (70%, no change), 'help the EU's industrial base so that it can become more competitive by promoting entrepreneurship and developing new skills' (69%, +1 point) and 'increase support for research and development policies and turn inventions into products' (60%, no change). Education measures, measures for encouraging European competitiveness and support for research therefore rank just below the social and environmental measures.

Since this indicator was first included in the spring 2010 Eurobarometer (EB73), the fight against exclusion, employment and sustainable development have constantly figured in the three Europe 2020 strategy initiatives which are perceived as the most important.

³ QB1. For each of the following initiatives, please tell me how important or not you think they are in order for the EU to exit the present financial and economic crisis and prepare for the next decade. Please use a scale from 1 to 10, where '1' means that you think this initiative is "not at all important" and '10' means that it is "very important".

This is the third time that this question has been asked in the Eurobarometer: spring 2010 (EB73), spring 2011 (EB75), and now in autumn 2011 (EB76). If we analyse the evolutions for each of the initiatives since spring 2010, it is clear that the answers to this question have remained very stable from one survey to the next.

After a three-point rise in the importance given to **'help the poor and socially excluded and enable them to play an active part in society'** between spring 2010 (EB73), 76%, and spring 2011 (EB75), 79%, the scores remain unchanged in autumn 2011.

After a three-point rise in the proportion mentioning **'modernise labour markets, with a view to raising employment levels'** between spring 2010 (76%) and spring 2011 (79%), this initiative has seen a very slight decline in autumn 2011 (78%, -1).

'Support an economy that uses fewer natural resources and emits less greenhouse gas' also gained ground by three points between spring 2010 (73%) and spring 2011 (76%); this initiative has fallen back very slightly in autumn 2011 (-1, to 75%).

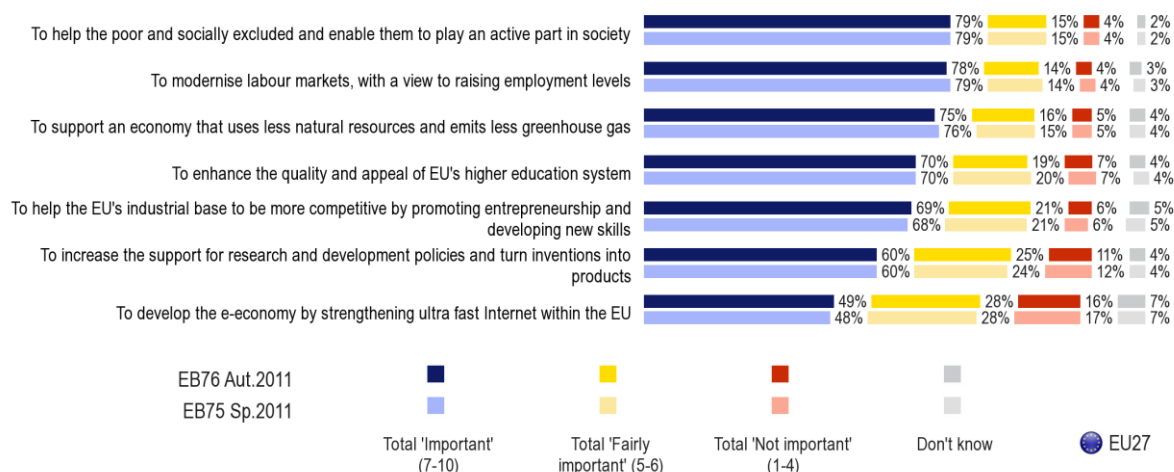
'Enhance the quality and appeal of EU's higher education system' is considered to be important by 70% of Europeans, the same as in spring 2011, when it recorded a three-point rise on spring 2010.

'Help the EU's industrial base to be more competitive by promoting entrepreneurship and developing new skills' has risen by one point to 69%, after remaining stable between spring 2010 and spring 2011.

The proportion of respondents in the European Union who believe that it is important to **'increase the support for research and development policies and turn inventions into products'** has remained stable since spring 2011 at 60%, after a very slight one-point rise between EB73 (spring 2010) and EB75 (spring 2011).

'Develop the e-economy by strengthening ultra-fast Internet within the EU' is an initiative whose perceived importance has grown since spring 2010 across Europe (46% in spring 2010; 48% in spring 2011, +2 points, and 49% in autumn 2011, +1 point). Nevertheless, it remains the only one of these initiatives which appears to be of relatively secondary importance to respondents. A little more than a quarter of interviewees say that this initiative is of average importance (28%, no change), and 16% (-1 point) that it is 'not important'.

QB1. For each of the following initiatives, please tell me how important or not you think they are in order for the EU to exit the present financial and economic crisis and prepare for the next decade. Please use a scale from 1 to 10, where '1' means that you think this initiative is "not at all important" and '10' means that it is "very important".



As in the spring 2011 Eurobarometer, an absolute majority of citizens in almost all Member States agree that the first six initiatives are important, with no significant evolutions. There are only two exceptions: in France (48%) and the United Kingdom (46%), only a relative majority of respondents attribute importance to **support for research and development policies**.

National opinions are more divided on **developing the e-economy**. There is a perceptible difference between the NMS12, where an absolute majority of respondents are convinced of the importance of the e-economy and broadband (58%) and the EU15, where this majority is only relative (47%). However, a detailed analysis by country shows that this measure is regarded as important by an absolute majority of interviewees in 15 of the 27 EU countries. These countries are Ireland (68%), Greece (65%), Slovakia (64%), Lithuania (64%), Slovenia (63%), Bulgaria (60%), Poland (59%), Romania (58%), Cyprus (57%), Malta (57%), Hungary (56%), Spain (56%), Italy (55%), Portugal (55%) and Latvia (54%).

QB1 For each of the following initiatives, please tell me how important or not you think they are in order for the EU to exit the present financial and economic crisis and prepare for the next decade.

Please use a scale from 1 to 10, where '1' means that you think this initiative is "not at all important" and '10' means that it is "very important".

| | To help the poor and socially excluded and enable them to play an active part in society | To modernise labour markets, with a view to raising employment levels | To support an economy that uses less natural resources and emits less greenhouse gas | To enhance the quality and appeal of EU's higher education system | To help the EU's industrial base to be more competitive by promoting entrepreneurship and developing new skills | To increase the support for research and development policies and turn inventions into products | To develop the e-economy by strengthening ultra fast Internet within the EU |
|------|------------------------------------------------------------------------------------------|-----------------------------------------------------------------------|--------------------------------------------------------------------------------------|-------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|
| EU27 | 79% | 78% | 75% | 70% | 69% | 60% | 49% |
| BE | 83% | 81% | 77% | 72% | 68% | 61% | 45% |
| BG | 86% | 87% | 86% | 76% | 86% | 69% | 60% |
| CZ | 76% | 88% | 75% | 68% | 76% | 64% | 48% |
| DK | 71% | 77% | 78% | 78% | 72% | 71% | 34% |
| DE | 85% | 82% | 86% | 84% | 64% | 66% | 49% |
| EE | 75% | 76% | 70% | 66% | 71% | 52% | 48% |
| IE | 85% | 85% | 75% | 77% | 80% | 72% | 68% |
| EL | 91% | 91% | 84% | 84% | 83% | 73% | 65% |
| ES | 88% | 85% | 79% | 83% | 73% | 69% | 56% |
| FR | 75% | 69% | 73% | 62% | 66% | 48% | 33% |
| IT | 71% | 72% | 69% | 58% | 69% | 56% | 55% |
| CY | 91% | 92% | 83% | 86% | 87% | 62% | 57% |
| LV | 85% | 90% | 73% | 75% | 83% | 60% | 54% |
| LT | 84% | 82% | 81% | 74% | 79% | 64% | 64% |
| LU | 83% | 71% | 74% | 73% | 74% | 56% | 34% |
| HU | 83% | 85% | 82% | 67% | 79% | 69% | 56% |
| MT | 89% | 84% | 83% | 85% | 71% | 66% | 57% |
| NL | 82% | 80% | 78% | 72% | 73% | 60% | 47% |
| AT | 73% | 75% | 80% | 75% | 61% | 59% | 49% |
| PL | 76% | 77% | 69% | 64% | 65% | 56% | 59% |
| PT | 84% | 85% | 75% | 74% | 73% | 66% | 55% |
| RO | 81% | 83% | 75% | 73% | 73% | 67% | 58% |
| SI | 91% | 94% | 84% | 69% | 88% | 72% | 63% |
| SK | 84% | 93% | 82% | 77% | 82% | 67% | 64% |
| FI | 88% | 88% | 81% | 71% | 83% | 62% | 47% |
| SE | 88% | 81% | 92% | 80% | 77% | 76% | 27% |
| UK | 72% | 71% | 64% | 54% | 59% | 46% | 39% |

Highest percentage per country

Lowest percentage per country

Highest percentage per item

Lowest percentage per item

2. OPINION OF THE EUROPEAN UNION'S TARGETS FOR EUROPE 2020

- The Europe 2020 targets seem realistic to the majority of Europeans -

Having ranked the various initiatives by their importance, Europeans were asked to say how realistic the EU's Europe 2020 strategy targets were. There were three possible answers here: 'too ambitious', 'about right', or 'too modest'.

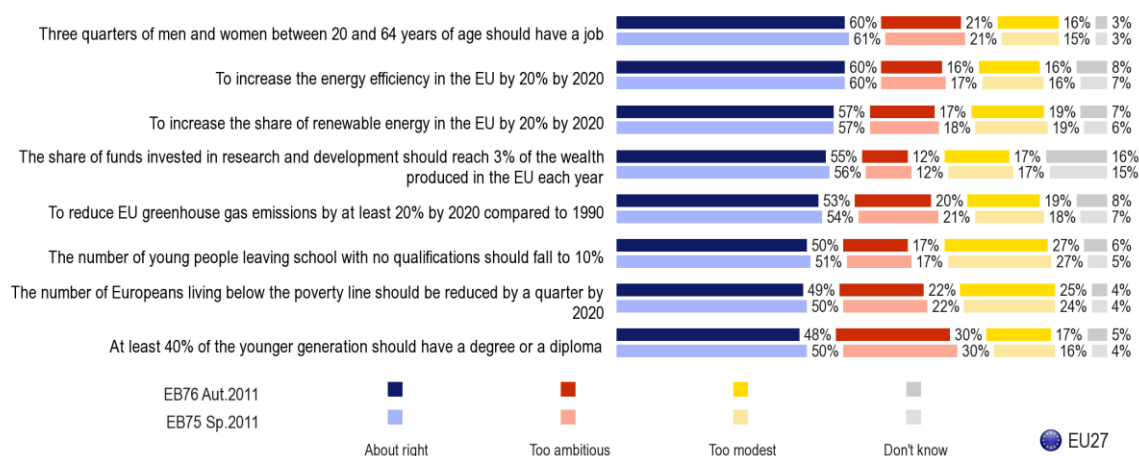
The targets tested were thought to be 'about right' by a large majority of respondents. Six of the eight targets were regarded as achievable by an absolute majority, with scores running from 50% for 'the number of young people leaving school with no qualifications should fall to 10%' to 60% for 'three quarters of men and women between 20 and 64 years of age should have a job', and 'increase the energy efficiency in the EU by 20% by 2020'. The other results in this range are as follows: 'increase the share of renewable energy in the EU by 20% by 2020', 57%; 'the share of funds invested in research and development should reach 3% of the wealth produced in the EU each year', 55%; and 'reduce EU greenhouse gas emissions by at least 20% by 2020 compared to 1990', 53%.

Two out of the eight targets attracted a large relative majority, approaching an absolute majority: 'the number of Europeans living below the poverty line should be reduced by a quarter by 2020' (49%) and 'at least 40% of the younger generation should have a degree or a diploma' (48%).

There has been a very slight decline since spring 2011, the perception that the targets are achievable falling by two points for one target and one point for five others. The remaining two are unchanged. Nevertheless, the main conclusion now as at the time of the previous survey is that a majority of Europeans regard all the Europe 2020 targets as 'about right', in other words as realistic and achievable ⁴.

⁴ QB2. Thinking about each of the following objectives to be reached by 2020 in the EU, would you say that it is too ambitious, about right or too modest?

QB2. Thinking about each of the following objectives to be reached by 2020 in the EU, would you say that it is too ambitious, about right or too modest?



When we analyse the variations on this question since spring 2010, a general trend emerges. First, and for all the targets tested, perceived realism fell back between the spring 2010 survey (EB73) and the autumn 2010 survey (EB74); then it gained ground again, or remained stable – for two of the eight objectives 'increase the share of renewable energy in the EU by 20% by 2020', and 'The number of young people leaving school with no qualifications should fall to 10%' – between autumn 2010 and spring 2011. Then – as we have already noted – it declined again for six of the eight targets. Ultimately, since spring 2010, the proportion of Europeans believing the Europe 2020 strategy targets to be 'about right' has fallen by three points or more for four of them, by one or two points for three of them, and has remained unchanged for just one.

Evolution of perceived relevance of the targets since the Standard EB 73, spring 2010

| Statement: « About right » | % | EB73 (Spr. 2010) | EB74 (Aut. 2010) | Evol. Aut.2010- Spr.2010 | EB75 (Spr. 2011) | Evol. Spr.2011- Aut.2010 | EB76 (Aut. 2011) | Evol. Aut.2011- Spr.2011 | Evol. Aut.2011- Spr.2010 |
|--------------------------------------------------------------------------------------------------------------------|----------|---------------------------------|---------------------------------|-----------------------------------------|---------------------------------|-----------------------------------------|---------------------------------|-----------------------------------------|-----------------------------------------|
| Three quarters of men and women between 20 and 64 years of age should have a job | | 63% | 59% | -4 | 61% | +2 | 60 % | -1 | -3 |
| The share of funds invested in research and development should reach 3% of the wealth produced in the EU each year | | 56% | 54% | -2 | 56% | +2 | 55% | -1 | -1 |
| To reduce EU greenhouse gas emissions by at least 20% by 2020 compared to 1990 | | 55% | 53% | -2 | 54% | +1 | 53% | -1 | -2 |
| To increase the share of renewable energy in the EU by 20% by 2020 | | 58% | 57% | -1 | 57% | = | 57% | = | -1 |
| To increase the energy efficiency in the EU by 20% by 2020 | | 60 % | 59% | -1 | 60% | +1 | 60 % | = | = |
| The number of young people leaving school with no qualifications should fall to 10% | | 53% | 51% | -2 | 51% | = | 50 % | -1 | -3 |
| At least 40% of the younger generation should have a degree or a diploma | | 52% | 48% | -4 | 50% | +2 | 48% | -2 | -4 |
| The number of Europeans living below the poverty line should be reduced by a quarter by 2020 | | 53% | 48% | -5 | 50% | +2 | 49% | -1 | -4 |

The targets 'Three quarters of men and women between 20 and 64 years of age should have a job' and 'The share of funds invested in research and development should reach 3% of the wealth produced in the EU each year' are regarded as achievable by a majority of respondents in every EU country ('about right' responses are 60% and 55% respectively). There are no notable national particularities, though in Cyprus opinion is somewhat divided on the target of ensuring employment for three-quarters of men and women between 20 and 64 years of age: 35% believe that this is realistic, while 33% say that the target is 'too modest'.

The three environmental targets, seen as achievable by a majority of respondents in every Member State, are nevertheless regarded in Belgium, Sweden and Austria as 'too modest' by proportions which are significantly above the European average. The aim of 'increasing the share of renewable energy in the EU by 20% by 2020', for example, appears too modest to 32% of interviewees in Belgium and Austria and to 37% in Sweden, compared with a European average of 19%. Opinion in Sweden is even more emphatic in respect of the target of 'reducing EU greenhouse gas emissions by at least 20% by 2020', this being the only country in which views are so evenly divided between those who think it is realistic and those who say it is too modest (44% against 40%). Finally, 29% of respondents in Austria, and 28% in Belgium and Sweden, believe that the aim of 'increasing energy efficiency in the EU by 20% by 2020' is too modest, compared with 16% in the European Union as a whole.

Opinion in Sweden and Belgium also stands out from the European trend when assessing the target of 'reducing the number of young people leaving school with no qualifications to 10%'. These are the only countries in which respondents are more likely to think this objective too modest than realistic, emphatically in Sweden (53% against 36%), and by a very narrow margin in Belgium (39% against 38%). Opinion in France is also atypical, being characterised by higher than average rates of responses assessing the target both as too modest (34%) and too ambitious (25%). 36% describe it as 'about right'.

'At least 40% of the younger generation should have a degree or a diploma' is regarded as too ambitious by a majority of respondents in five countries, Germany (55% against 33% who say it is 'about right'), Estonia (49% against 38%), the Czech Republic (47% against 44%), Hungary (44% against 43%) and Austria (43% against 42%). Conversely, it is regarded as too modest very generally in Sweden (69%), and by a relative majority in Denmark (47%) and Belgium (45%). It appears realistic to a majority in all the remaining Member States.

Finally, the target which aims to fight poverty was seen as 'too modest' by a narrow margin in three countries, Sweden (44% against 42% 'about right'), Belgium (38% against 37%) and Cyprus (34% against 30% 'about right', and 33% 'too ambitious'). 'Too ambitious' and 'about right' received first equal scores in Greece.

3. EUROPEAN UNION PRIORITIES FOR EACH INITIATIVE

- Youth employment, social welfare, training and the encouragement of renewable energies remain the actions prioritised by Europeans -

As in the previous Eurobarometer surveys, Europeans were then asked to consider the actions which should take priority in the seven flagship Europe 2020 initiatives: innovation, youth, the Internet, energy, industry, employment and skills, and combating poverty. In each of these areas three actions were put to the interviewees. They were first asked to say which priority they thought was the most important (Firstly?), with only one answer allowed; then the others (and then?), where several answers could be given. Totalling the responses to the two parts of the question gives an overall rating. In this report we analyse both these sets of results.

The results have remained generally stable since preceding Eurobarometer surveys. The two previous surveys (EB74 in autumn 2010 and EB75 in spring 2011) showed that the EU's proposed priorities for developing European innovation, helping young people into the employment market, strengthening access to the Internet for everyone, improving the efficiency of energy consumption, supporting European industry, improving employment and training opportunities for working people and combating poverty and social exclusion were very favourably received by Europeans. This reflected the strength of public demand for practical measures enabling Europe to emerge from the crisis. These conclusions continue to hold true in this new survey: of the 21 actions tested, 19 are regarded as priorities by an absolute majority of Europeans.

The order in which these 19 actions are ranked remains unchanged since the spring 2011 Eurobarometer. **The resonance of social concerns for Europeans, particularly in the area of employment but also, to a lesser extent, in relation to the environment, are still evident in this ranking.**

Of the 21 actions tested, six in particular are given overwhelming priority for implementation by the EU⁵. These are increasing youth employment (83%, unchanged since the preceding survey), improving the general quality of all levels of education (79%, -1 point), encouraging employment and training opportunities for working people (75%, -1 point), helping people adapt to new working conditions and potential career shifts (74%, -1), safeguarding social welfare systems and improving access to healthcare (74%, +1 point) and promoting renewable energy sources (73%, no change).

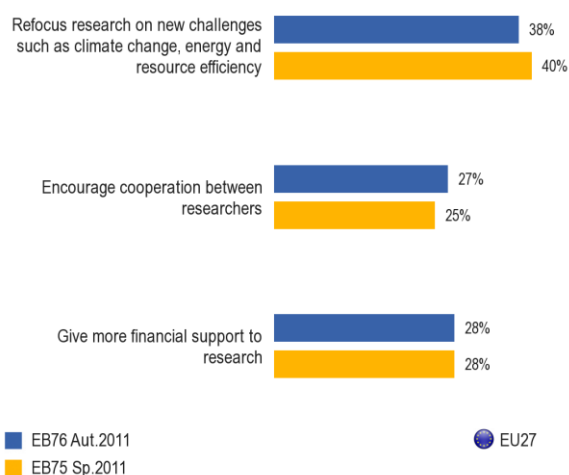
⁵ QB3-B9. Thinking about innovation/young people/the Internet/energy/industry/jobs and skills/poverty, what do you think should be the EU's priority? Firstly? And then?

3.1 Priorities for innovation

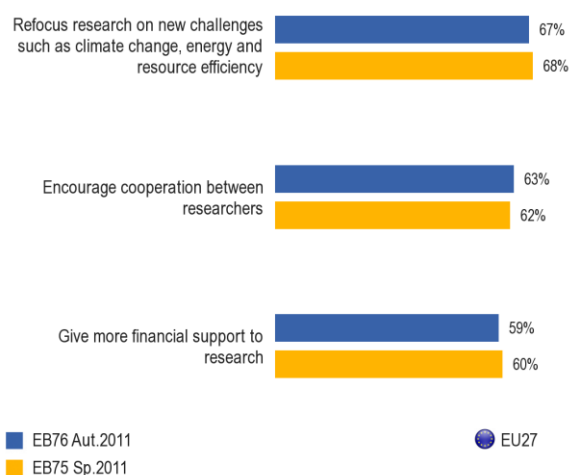
With 38% of mentions (-2 points since EB75), Europeans make 'refocusing research on new challenges such as climate change, energy efficiency and efficiency of resources' the top EU priority for innovation. As a first choice, this action clearly outstrips 'increasing finance for research' (28%, no change) and 'encouraging cooperation between researchers' (27%, +2).

The ranking of the combined responses is closer, and encouraging cooperation between researchers stands in second place. But over and above the order in which they stand, it is clear that the three proposed actions are priorities for almost six out of ten Europeans or more.

QB3a. Thinking about innovation, what do you think should be the EU's priority? Firstly?



QB3T. Priorities of the EU (Innovation)



If refocusing research on new challenges such as climate change, energy efficiency and efficiency of resources is the first priority in both sets of countries, encouraging cooperation between researchers is significantly more often mentioned in euro-zone countries (66%) than in countries outside the euro-zone (58%).

Always very alert to environmental concerns, respondents in the Nordic countries (63% in Sweden, 57% in Denmark and 55% in Finland) and in Germany (51%) are among the most likely to mention refocusing research on new environmental challenges as the *first priority* for innovation policy, with mentions exceeding 50%. This is also the case in Cyprus (61%) and Slovakia (53%).

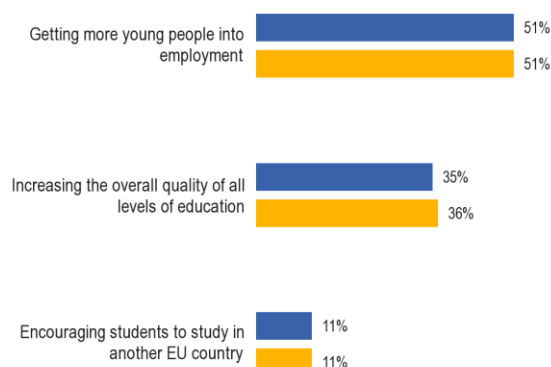
Spain and Romania are the two countries where increasing financial support to research is the *first priority* (Spain 42%; Romania 32%). This is also the case in Latvia, where it is equal with refocusing research on the new environmental challenges (34%). Finally, Italy is the only country in which encouraging cooperation between researchers is the first priority for innovation policy (35%).

3.2 Priorities for youth

Judgements on youth policy remain very stable. Encouraging youth employment continues to be the number one youth policy priority for Europeans. With 51% *first responses* (no change), 'increasing the number of young people in employment' receives a higher score than 'improving the general quality of all levels of education' (35%, -1 point) and a much higher score than 'encouraging students to study in another EU Member State' (11%, no change). Of the 21 actions tested, **increasing the number of young people in employment is the only one to receive an absolute majority of first choice mentions** in no fewer than 12 Member States.

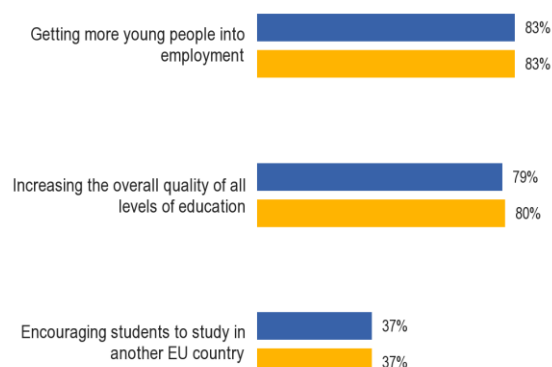
When responses are combined, the measures to encourage youth employment (83%, no change) and to improve the general quality of education (79%, -1) emerge as the two priority actions for implementation, ahead of encouraging student mobility (37%, no change). This last measure is one of only two of the 21 actions which do not command a majority in the combined ranking, evidence of its more secondary importance in public opinion.

QB4a. Thinking about young people, what do you think should be the EU's priority? Firstly?



■ EB76 Aut. 2011
■ EB75 Sp. 2011

QB4T. Priorities of the EU (Young people)



■ EB76 Aut. 2011
■ EB75 Sp. 2011

● EU27

As was previously observed at the time of EB75 in spring 2011, respondents in the EU15 countries are more likely to mention 'improving the general quality of all levels of education' (80%, compared to 74% in the NMS12 countries), while those in NMS12 countries are significantly more likely to mention 'encouraging students to study in another Member State' (46%, compared to 34% in EU15). However, the ranking of the three priorities remains similar between both groups of countries.

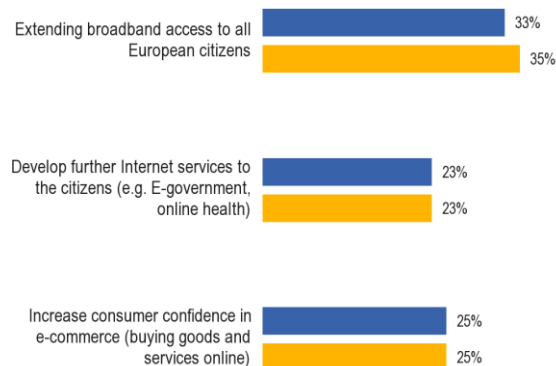
Bulgaria, Latvia, Luxembourg and the Netherlands are the only Member States where respondents assign *first priority* to increasing the overall quality of all levels of education. This is also the case in Malta, but in equal first place with 'getting more young people into employment', the item which heads the list in every other country. This response attracts more than 50% of first responses in eleven EU countries, led by Finland (62%), Hungary (60%), Poland (59%) and the United Kingdom (57%).

3.3 Priorities for the Internet

High speed Internet access for all Europeans is the first priority identified by respondents for the EU's IT policy. With 33% of mentions (-2 points), it is cited as a *first response* ahead of 'strengthening consumer confidence in e-commerce' (25%, no change) and 'the development of Internet services for citizens' (23%, no change). The ranking thus remains unchanged since the Standard Eurobarometer 75 of spring 2011.

In the combined ranking, we observe that a majority of Europeans regard all three actions as priorities. Extending broadband Internet access remains at the top of the ranking, second place having previously been taken by the development of Internet services.

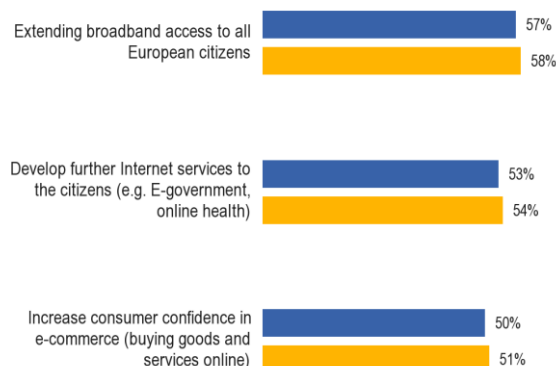
QB5a. Thinking about the Internet, what do you think should be the EU's priority? Firstly?



■ EB76 Aut.2011
■ EB75 Sp.2011

● EU27

QB5T. Priorities of the EU (Internet)



■ EB76 Aut.2011
■ EB75 Sp.2011

● EU27

Respondents in the euro-zone countries are more likely than those outside the euro-zone to mention 'strengthening consumer confidence in e-commerce' as a priority for the EU (53% compared 44%). However, both groups of countries agree in putting 'extending broadband access' at the top of the ranking.

Extending broadband access leads the *first priorities* mentioned in 15 EU countries, with the highest levels in Poland (47%), Slovenia (44%), Hungary (43%) and Denmark (43%). This is also the case in Ireland and Latvia, but equal with developing Internet services to citizens.

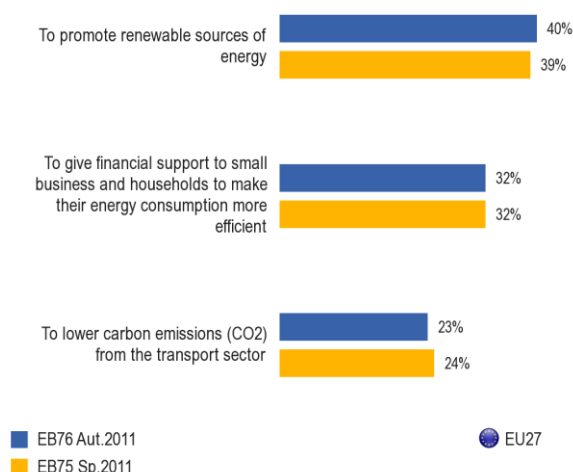
The development of on-line services to citizens is mentioned as the first priority in Belgium, Estonia, Luxembourg, Bulgaria, Romania and Malta.

Increasing consumer confidence in e-commerce is the first priority in four countries, Germany, Italy, Portugal and Cyprus.

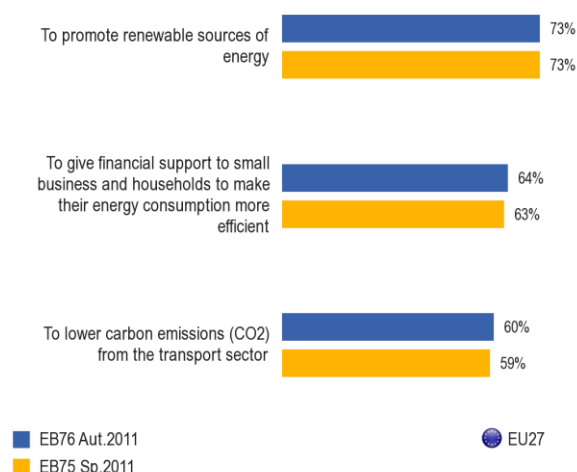
3.4 Priorities for energy

Opinions on the priorities for energy policy are also characterised by great stability. The promotion of renewable energy sources remains the first priority identified by respondents for the European Union's energy policy. It clearly leads the ranking both as the *first choice* (40%, +1) and when the responses are combined (73%, no change). With 32% (no change) and 64% (+1) of mentions, 'financial aid for small businesses and households to make their energy consumption more efficient' is in second place in both rankings. In third and final place is the reduction of CO₂ emissions in the transport sector, which is mentioned '*firstly*' by 23% of Europeans (-1) and by 60% in total (-1). The combined results for these three measures thus show that all are regarded as priority measures by an absolute majority of respondents.

QB6a. Thinking about energy, what do you think should be the EU's priority? Firstly?



QB6T. Priorities of the EU (Energy)



Respondents in EU15 countries tend to assign *first priority* to the promotion of renewable energy sources, ahead of 'financial support for small businesses and households to make their energy consumption more efficient' (42% against 31%) while the reverse applies in NMS12 countries, where 36% of respondents opt for support for households and small businesses, and 31% for the development of renewable energy sources.

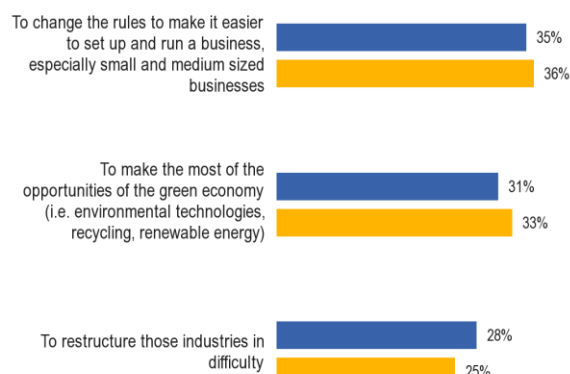
Promoting renewable energy sources is the *first priority* mentioned in 17 EU countries, with first priority scores exceeding 50% in the Netherlands (62%), Denmark (62%), Sweden (55%), Germany (55%) and Finland (54%). **Once again, the extreme sensitivity of opinion in these countries to all environmental issues is evident.**

Financial support for households and SMEs is the *first priority* for EU energy policy in nine countries: Latvia (49%), Ireland (47%), Malta (41%), the Czech Republic (40%), Slovakia (38%), Italy (36%), Poland (36%), Romania (35%) and Bulgaria (35%). Finally, these two measures are cited equally as the *first priority* in Hungary, on 36%.

3.5 Priorities for industry

The encouragement of entrepreneurship by changing the regulations to make it easier to set up and run a business continues to be the top economic and industrial policy priority for Europeans, mentioned 'first' by 35% (-1 point) and by 68% in total (-2). 'Making the most of the opportunities of the green economy' came very close behind business creation, and was cited by 31% first (-2) and 62% in total (-1). 'Restructuring industries in difficulty' now attracts more support, with a three-point rise in both 'first' (28%) and combined (60%) responses. This measure is drawing close to 'making the most of the opportunities of the green economy' in the ranking. The crisis has no doubt made the public more acutely aware of the challenges of industrial restructuring.

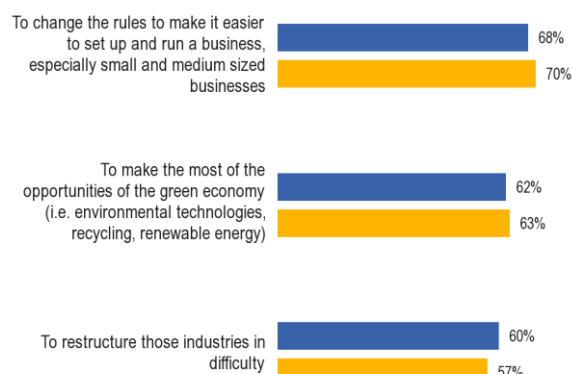
QB7a. Thinking about industry, what do you think should be the EU's priority? Firstly?



■ EB76 Aut.2011
■ EB75 Sp.2011

● EU27

QB7T. Priorities of the EU (Industry)



■ EB76 Aut.2011
■ EB75 Sp.2011

● EU27

Entrepreneurship, seizing the opportunities offered by 'green growth', and industrial restructuring: these three actions remain 'total' priorities for an absolute majority of Europeans.

The order of economic and industrial priorities for the EU differs noticeably within and outside the euro-zone. In euro-zone countries, developing the green economy (35%) is chosen ahead of simplifying business creation (32%) and the restructuring of industries in difficulty (28%); in countries which do not belong to the euro-zone, simplifying business creation (40%) is the first priority, a long way ahead of industrial restructuring (27%) and maximising the opportunities of green growth (25%).

Making it easier to set up a business is the *first priority* in 11 countries, with the highest scores in Latvia (50%) and Ireland (48%).

Maximising the potential of the green economy stands in first place in nine countries, the highest levels being recorded in Denmark (49%), Sweden (47%) and Germany (46%).

Restructuring industries in difficulty is now the *first priority* chosen in five countries: Portugal (40%), Greece (39%), Hungary (36%), Italy (35%) and Malta (33%). This was only the case in Malta and Portugal at the time of the Standard Eurobarometer 75 in spring 2011. Once again, the economic crisis is boosting expectations of a policy to aid industries in difficulty.

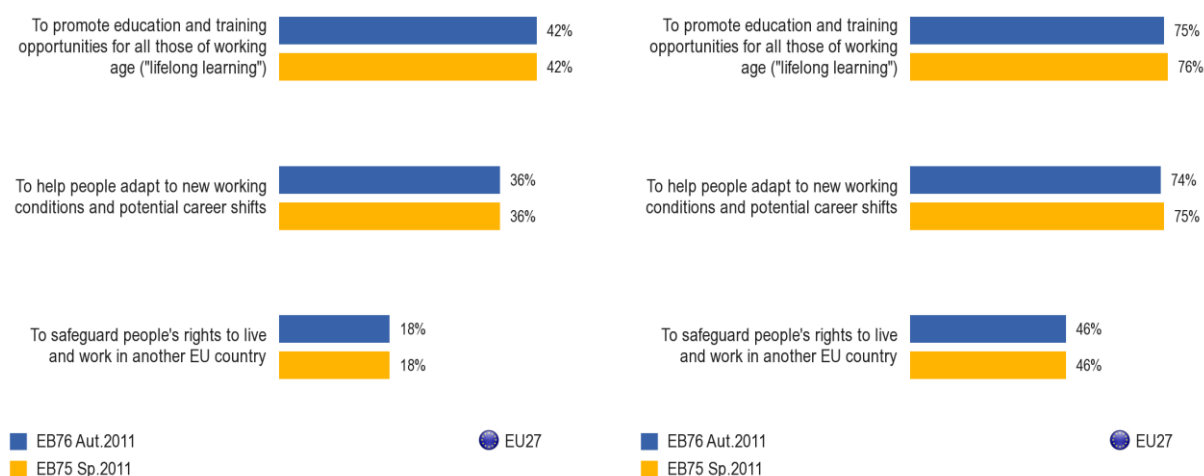
Finally, maximising the opportunities offered by the green economy and support for business creation are cited equally as the first priority in Belgium, at 35%. In France, it is industrial restructuring which stands in equal *first place* (32%) with the development of green growth.

3.6 Priorities for employment and skills

Opinions regarding the priorities for employment and skills are unchanged. Encouraging opportunities for education and training for everyone of working age continues to head Europeans' priorities for the EU in this area, mentioned by 42% 'first' (no change) and 75% in total (-1). It is just ahead of 'help for people to adapt to new working conditions and potential career changes' which is mentioned 'first' by 36% (no change) and by 74% in total (-1). These two priorities far outstrip 'safeguarding people's rights to live and work in another EU country', which is mentioned as a *first priority* by 18% (no change) and by 46% in total (no change). This action is one of the two which do not have the support of more than half of Europeans, perhaps because this right seems to be a matter of course today to a large majority of them.

QB8a. Thinking about jobs and skills, what should be the EU's priority? Firstly?

QB8T. Priorities of the EU (Jobs and skills)



The ranking of priorities in the EU15 countries differs significantly from the NMS12 results with regard to policies on employment and skills. 'Promoting education and training opportunities for all people of working age' ('lifelong learning') is mentioned as a *first response* in the EU15 countries (46%) but stands only in second place in the NMS12 (28%), some way behind 'helping adapt to new working conditions and possible career changes' (42%, against 34% in EU15 countries).

Promoting lifelong learning is the *first priority* for employment policy mentioned in 13 EU countries, with first priority scores exceeding 50% in Sweden (62%), Denmark (56%), the Netherlands (54%), the United Kingdom (53%) and Germany (51%).

Introducing policies to 'help people adapt to new working conditions and career changes' is the *first priority* in the remaining 14 countries, with an absolute majority of mentions in Cyprus (54%) and Hungary (51%).

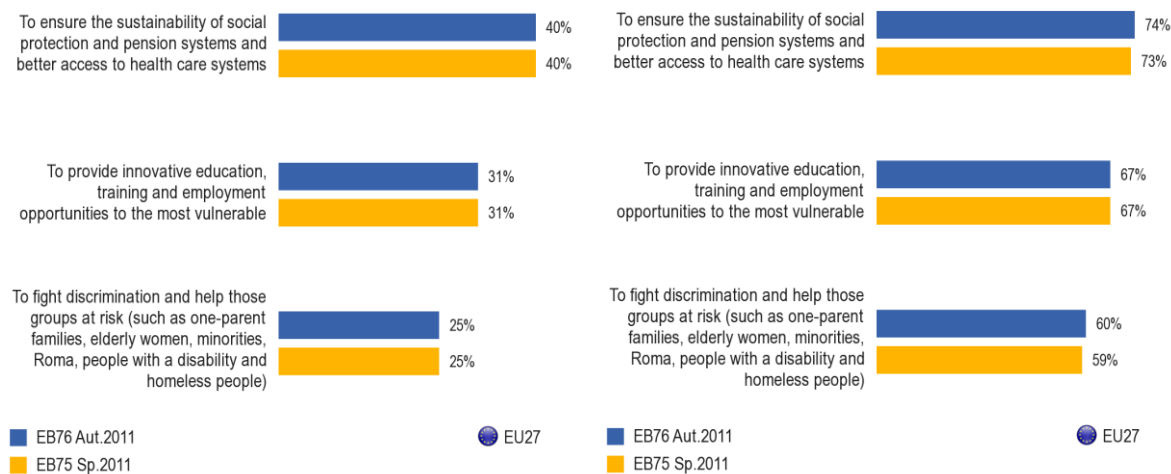
3.7 Priorities for combating poverty

The combined scores show that all three measures for tackling poverty are considered as priorities by an absolute majority of Europeans. Safeguarding social protection and improving access to healthcare leads the ranking of both *first responses* (40%, no change) and total responses (74%, +1). 'Offering the most vulnerable innovative opportunities for training, qualifications and employment' is in second place, with 31% of Europeans making this their *first priority* and 67% in total citing this item (both unchanged). The fight against discrimination stands in third place, mentioned *first* by 25% of respondents (no change) and by 60% in total (+1).

Though safeguarding social protection and improving access to healthcare is the *first priority* identified in this area in both groups of countries, the score is nevertheless significantly higher in NMS12 countries (46%) than in the EU15 (38%). Ensuring the sustainability of social protection and pension systems and improving access to healthcare is the top priority in 22 countries, and receives more than 50% *first* mentions in the Baltic States ((Latvia (54%), Estonia (53%) and Lithuania (52%)), Slovenia (51%), Slovakia (51%) and Sweden (51%).

QB9a. Thinking about poverty, what should be the EU's priority? Firstly?

QB9T. Priorities of the EU (Poverty)



A policy providing 'training and employment opportunities for the most vulnerable' is cited as the *first priority* for combating poverty in four countries, Luxembourg (46%), Ireland (44%), Malta (43%) and the United Kingdom (34%).

These two measures stand in equal *first place* in the Netherlands (38%).

The fight against discrimination is not the first priority in any country, but it is mentioned by more than a third of respondents in Finland (34%).

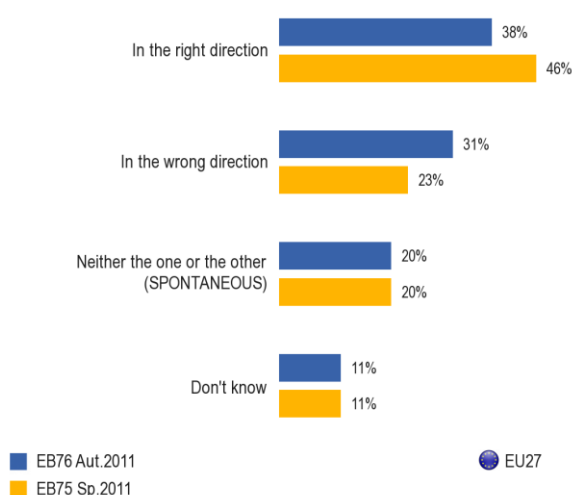
While for all these questions there are variations between groups of countries, and even more striking differences between individual Member States, there are very few differences in terms of the socio-demographic profile of respondents. Beyond the national particularities analysed in the designation of the *first priority*, it should be remembered that the 19 measures which receive an absolute majority of mentions in total at the European level also do so, in almost every case, in each country. It may therefore be concluded, as in spring 2011, that there is a widespread and consensual demand in European public opinion for active policies to support education and employment for young people, to safeguard social protection and access to healthcare for all, and to support green growth and sustainable development.

4. THE DIRECTION TAKEN BY THE EUROPEAN UNION TO COMBAT THE CRISIS

- Opinions of the EU's policy for emerging from the crisis in the European Union are deteriorating -

Throughout this survey, opinions on the importance of the flagship initiatives, the realism of the targets and the priority nature of the Europe 2020 strategy measures have been all marked by great stability. However, opinions on the direction taken by the European Union in order to emerge from the crisis have deteriorated sharply.

QB10. Having heard about the priorities of the EU, do you think that the EU is going in the right direction or in the wrong direction to exit the crisis and face the world new challenges?



Slightly fewer than four in ten Europeans (38%) think that the EU is going in the right direction to emerge from the crisis and face the new global challenges, an eight-point decline since spring 2011 Eurobarometer (EB75). 31% think the opposite - that the EU is going in the wrong direction, an increase of eight points. One-fifth (no change) *spontaneously* say that the EU is going in neither the right direction nor the wrong direction while 11% (no change) failed to answer the question. The stability of the 'neither right nor wrong' response and the D/K rate thus demonstrates that this six

month period has seen public opinion slide towards a negative assessment of the EU's policies for emerging from the crisis.

Positive assessments are down nine points in the countries which have not adopted the single currency, eight points in the EU15 countries, seven points in the euro-zone and six points in the NMS12. This downward trend substantially narrows the ratio of positive to negative assessments in the EU15 countries (35% to 33%) and inside the euro-zone (35% to 32%). However, it has not so far prevented positive assessments from continuing to dominate in the NMS12 countries (51% to 23%) and in countries outside the euro-zone (46% to 29%).

With the sole exceptions of Latvia (+2 points), Sweden (+1) and Denmark (+1), the trend towards deteriorating assessments of the direction being taken by the EU is tangible in every Member State. It is particularly strong in this survey in the United Kingdom (-17 points), Romania (-14), Ireland (-14), Belgium (-12), Slovakia (-12), Spain (-12), Hungary (-9) and Italy (-8).

This trend therefore affects both the countries which were already noticeably more critical than the European average at the time of the previous survey in spring 2011, such as Spain and Italy, and those countries which were formerly characterised by an approval rate distinctly higher than the European average, like Romania, Belgium and Slovakia.

Under the impact of these evolutions, negative assessments now hold sway in five countries, Spain (46%, compared with 28% of 'right direction' answers), Greece (42% against 32%), the United Kingdom (42% against 32%), Italy (34% against 21%) and Portugal (33% against 30%). This was only the case in Greece at the time of the preceding Standard Eurobarometer 75 in spring 2011.

Approval of the direction taken is therefore dominant in 22 countries, with the highest levels in Sweden (67%), Lithuania (65%), Bulgaria (60%), Poland (57%) and Finland (57%). Positive assessments have a much narrower lead in France (37% against 35%). They exceed or equal 50% in 10 countries, whereas this was the case in 17 countries in spring 2011. In Romania, Belgium, Slovakia, Hungary, Luxembourg, the Czech Republic and the Netherlands, only a relative majority of respondents are now positive, rather than an absolute majority as was the case at the time of the Standard Eurobarometer 75 in spring 2011.

The socio-demographic analysis shows that the direction being taken by the European Union to emerge from the crisis is more likely to be supported by the young and by socially advantaged groups. Thus, 48% of 15-24 year olds approve of the direction being taken, compared to 35% of the 55+ age group. The direction taken by the Union is supported by 46% of those who continued their education beyond the age of 19, 48% of students, 48% of managers and 45% of those who position themselves towards the top of the social scale, but by only 28% of those who left school before the age of 16, 39% of manual workers, 34% of the unemployed, 31% of house persons and 33% of those who place themselves at the bottom of the social scale.

It also shows that the sharp downward trend in approval affects the entire European population, advantaged and disadvantaged categories alike. In other words, approval is declining both in the categories which traditionally support the European Union and in the traditionally more critical categories:

- since the Standard Eurobarometer 75 in spring 2011, approval of the EU's policies for emerging from the crisis (down by eight points among Europeans generally) has declined by six points among men, eight points in the 15-24 age group, seven points among people who studied beyond the age of 19, eleven points among students, and nine points among managers and the people positioning themselves at the top of the social scale.
- over the same period, approval has declined by ten points among women, six points in the 55+ age group, seven points among those who left school before the age of 16, nine points among the unemployed, eight points among house persons and six points among the people positioning themselves at the bottom of the social scale.

QB10 Having heard about the priorities of the EU, do you think that the EU is going in the right direction or in the wrong direction to exit the crisis and face the world new challenges?

| | In the right direction | In the wrong direction | Neither the one or the other (SPONTANEOUS) | DK |
|------|------------------------|------------------------|--------------------------------------------|-----|
| EU27 | 38% | 31% | 20% | 11% |

**Sex**

| | | | | |
|--------|-----|-----|-----|-----|
| Male | 42% | 32% | 18% | 8% |
| Female | 35% | 30% | 22% | 13% |

**Age**

| | | | | |
|-------|-----|-----|-----|-----|
| 15-24 | 48% | 27% | 17% | 8% |
| 25-39 | 40% | 31% | 19% | 10% |
| 40-54 | 36% | 33% | 20% | 11% |
| 55 + | 35% | 31% | 22% | 12% |

**Education (End of)**

| | | | | |
|----------------|-----|-----|-----|-----|
| 15- | 28% | 36% | 22% | 14% |
| 16-19 | 37% | 32% | 21% | 10% |
| 20+ | 46% | 26% | 18% | 10% |
| Still studying | 48% | 26% | 17% | 9% |

**Respondent occupation scale**

| | | | | |
|---------------------|-----|-----|-----|-----|
| Self-employed | 35% | 33% | 23% | 9% |
| Managers | 48% | 25% | 18% | 9% |
| Other white collars | 39% | 30% | 21% | 10% |
| Manual workers | 39% | 33% | 18% | 10% |
| House persons | 31% | 31% | 22% | 16% |
| Unemployed | 34% | 38% | 18% | 10% |
| Retired | 35% | 31% | 22% | 12% |
| Students | 48% | 26% | 17% | 9% |

**Difficulties paying bills**

| | | | | |
|-------------------|-----|-----|-----|-----|
| Most of the time | 28% | 39% | 22% | 11% |
| From time to time | 33% | 35% | 21% | 11% |
| Almost never | 43% | 28% | 19% | 10% |

Self-positioning on the social staircase

| | | | | |
|--------------|-----|-----|-----|-----|
| Low (1-4) | 33% | 36% | 20% | 11% |
| Medium (5-6) | 38% | 30% | 21% | 11% |
| High (7-10) | 45% | 29% | 17% | 9% |