



Standard Eurobarometer 78 Autumn 2012

EUROPE 2020

REPORT

Fieldwork: November 2012

This survey has been requested and co-ordinated by the European Commission,
Directorate-General for Communication.

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

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Standard Eurobarometer 78
Autumn 2012

Europe 2020

Survey carried out by TNS Opinion & Social at the request of
the European Commission, Directorate-General Communication

Survey coordinated by the European Commission,
Directorate-General Communication
"Research and Speechwriting" Unit

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INTRODUCTION

The European Commission launched the Europe 2020 strategy in March 2010 in order to prepare the European economy for the key issues and challenges of the 2010-2020 decade¹ and to promote innovative, sustainable and inclusive growth for the benefit of European citizens as a whole.

The way in which this framework strategy is perceived by European public opinion has been measured since the spring 2010 Standard Eurobarometer (EB73). In this survey, carried out in autumn 2012 (EB78), it is approached via three indicators. First, we asked Europeans about the importance they attach to the seven initiatives set out by the European Commission in the Europe 2020 strategy. Secondly, they were asked how realistic they thought the strategy's targets for 2020. Finally, after giving their views on these flagship initiatives and targets, Europeans were asked whether they think the European Union is going in the right direction to emerge from the crisis

This Standard Eurobarometer survey was carried out between 3 and 18 November 2012 in 34 countries and territories²: the 27 Member States of the European Union, the six candidate countries (Croatia, the Former Yugoslav Republic of Macedonia, Turkey, Iceland, Montenegro and Serbia), and the Turkish Cypriot Community in the part of the country not controlled by the government of the Republic of Cyprus. The questions on the Europe 2020 strategy were only asked in the 27 European Union Member States.

The full Standard Eurobarometer report consists of several volumes. The first volume analyses the results of the historical indicators of the Standard Eurobarometer survey. Four other volumes present the state of European public opinion on other themes: the Europe 2020 strategy; the financial and economic crisis; European citizenship; and media use in the European Union. This volume is devoted to the Europe 2020 strategy.

The general analysis and the socio-demographic analyses are based on the results at the level of the average of the 27 Member States. This average is weighted so that it reflects the population of each Member State. The averages for previous years represent the results obtained in all the Member States of the European Union, as it was composed at the time the survey was conducted.

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

² Please consult the technical specifications for the exact dates of the fieldwork in each country

The methodology used is that of the Eurobarometer surveys carried out by the Directorate-General Communication ("Research and Speechwriting" Unit)³. A technical note concerning the interviews conducted by the member institutes of the TNS Opinion & Social network is annexed to this report. It also specifies the confidence intervals⁴.

The following abbreviations are used in this report:

ABBREVIATIONS			
BE	Belgium	LV	Latvia
CZ	Czech Republic	LU	Luxembourg
BG	Bulgaria	HU	Hungary
DK	Denmark	MT	Malta
DE	Germany	NL	The Netherlands
EE	Estonia	AT	Austria
EL	Greece	PL	Poland
ES	Spain	PT	Portugal
FR	France	RO	Romania
IE	Ireland	SI	Slovenia
IT	Italy	SK	Slovakia
CY	Republic of Cyprus***	FI	Finland
LT	Lithuania	SE	Sweden
		UK	United Kingdom
CY (tcc)	Turkish Cypriot Community		
HR	Croatia	EU27	European Union – weighted average for the 27 Member States
TR	Turkey		
MK	Former Yugoslav Republic of Macedonia ****	EU15	BE, IT, FR, DE, LU, NL, DK, UK, IE, PT, ES, EL, AT, SE, FI*
IS	Iceland	NMS12	BG, CZ, EE, CY, LT, LV, MT, HU, PL, RO, SI, SK**
ME	Montenegro	Euro zone	BE, FR, IT, LU, DE, AT, ES, PT, IE, NL, FI, EL, EE, SI, CY, MT, SK
RS	Serbia	Non-euro zone	BG, CZ, DK, LV, LT, HU, PL, RO, SE, UK

* EU15 refers to the 15 European Union Member States before the enlargements of 2004 and 2007

** The NMS12 countries are the 12 "new Member States" that joined the European Union at the time of the 2004 and 2007 enlargements

*** 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 in the "CY(tcc)" (tcc: *Turkish Cypriot Community*) category)

**** 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

* * * * *

*We wish to thank all the people interviewed throughout Europe
who took the time to participate in this survey.*

Without their active participation, this survey would not have been possible.

³ http://ec.europa.eu/public_opinion/index_en.htm

⁴ The results tables are annexed. It should be noted that the total of the percentages indicated in the tables in this report may exceed 100% when the respondent was able to choose several answers to the same question.

I. THE PERCEIVED IMPORTANCE OF THE EU'S EUROPE 2020 INITIATIVES

- All the Europe 2020 strategy initiatives are seen as more important than in spring 2012 -

In this Standard Eurobarometer carried out in autumn 2012 (EB78), Europeans were first asked to specify the level of importance of the seven initiatives set out by the European Union⁵ in the Europe 2020 strategy, to emerge from the financial and economic crisis and to ensure that the European Union is properly prepared to face the future. To this end, respondents were asked to rank each initiative on a scale from 1 to 10, where 1 corresponds to "not at all important" and 10 corresponds to "very important". The percentages were then aggregated into three categories of answers: "important" for scores 7 to 10, "quite important" for scores 5 and 6 and "not important" for scores 1 to 4. This question has been asked in an identical way in all the Standard Eurobarometer surveys since the spring 2010 survey (EB73).

The previous survey (spring 2012 Eurobarometer survey, EB77) concluded that the crisis has created a deep-seated and persisting demand for action to address issues of employment, sustainable growth, competitiveness and the fight against poverty. These conclusions remain valid, and the evolutions in the latest survey confirm this demand. Each initiative tested has increased in importance in the eyes of Europeans since spring 2012. The initiative intended "to increase the support for research and development policies and turn inventions into products" has gained the most ground (+6 percentage points). In this survey, an absolute majority of Europeans consider that all the initiatives are important, including the development of the digital economy, which was not the case in the spring 2012 Eurobarometer survey. Within this group of initiatives, social measures (employment and combating exclusion) and the environment (support for sustainable growth) continue, as in all the previous surveys, to top the list of priorities, ahead of measures designed to support competitiveness, education and innovation.

In more detail, eight out of ten Europeans consider that it is important "to help the poor and socially excluded and enable them to play an active part in society" (80%, +2 percentage points since the spring 2012 Eurobarometer survey) and "to modernise labour markets, with a view to raising employment levels" (80%, +2).

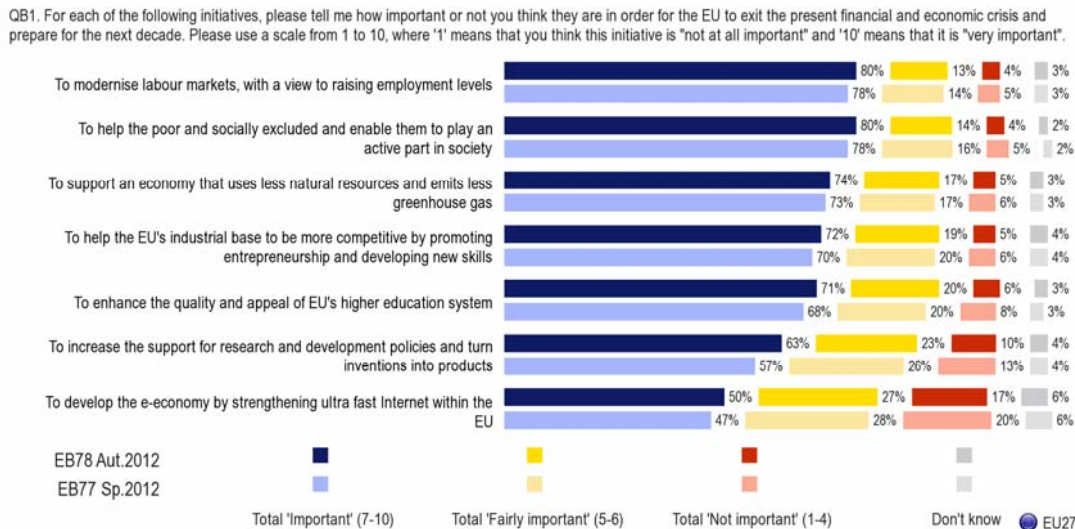
More than seven out of ten believe that it is important "to support an economy that uses less natural resources and emits less greenhouse gas" (74%, +1), "to help the EU's industrial base to be more competitive by promoting entrepreneurship and developing new skills" (72%, +2) and "to enhance the quality and appeal of the EU's higher education system" (71%, +3).

⁵ 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 that this initiative is "not at all important" and '10' means that it is "very important".

Almost two-thirds of respondents (63%, +6) agree on the importance of the initiative intended “to increase the support for research and development policies and turn inventions into products”.

Lastly, half of Europeans (50%, +3) believe that it is important “to develop the e-economy by strengthening ultra-fast Internet within the EU”.

Since this indicator was introduced in the spring 2010 Standard Eurobarometer survey (EB73), Europeans have invariably ranked employment, the fight against exclusion and sustainable development as the three most important initiatives of the Europe 2020 strategy.



There is a broad public consensus on the importance of the Europe 2020 initiatives: the initiatives for modernising labour markets, combating exclusion, supporting sustainable economic growth, boosting competitiveness, improving the educational system and supporting R&D policies are seen as important by an absolute majority of respondents in all the EU Member States (with the sole exception of the United Kingdom in the case of support for research policies). The development of the e-economy is the only initiative on which perceptions differ significantly between countries: respondents in the NMS12 countries (57%) are far more likely than those in the EU15 (48%) to see this initiative as important. In this survey, the perceived importance of the main initiatives of the Europe 2020 strategy has grown particularly noticeably in the Nordic countries, the Benelux countries and Slovenia.

Agreement on the importance of modernising labour markets and raising employment levels ranges from 70% in Luxembourg to 95% in Slovenia. The perceived importance of this initiative has increased significantly in this survey in Belgium (+8 percentage points), Denmark (+7), Slovenia (+6) and Finland (+5).

The perceived importance of supporting the social inclusion of people with difficulties ranges from 72% in Denmark and Estonia to 93% in Finland, with the biggest increases in Belgium (+6) and Finland (+6).

Agreement on the importance of support for a more sustainable economy with fewer greenhouse gas emissions ranges from 64% in the United Kingdom to 93% in Sweden, with the biggest increases in Slovenia (+10 percentage points), Belgium (+8) and Sweden and Finland (+7 in both cases).

The importance of boosting competitiveness by promoting entrepreneurship is acknowledged by majorities ranging from 65% in Poland and the United Kingdom to 88% in Bulgaria and Slovenia. The perceived importance of this initiative has gained substantial ground in Denmark (+11), Luxembourg (+11), Sweden (+11), Finland (+8), Slovenia (+8) and Belgium (+7).

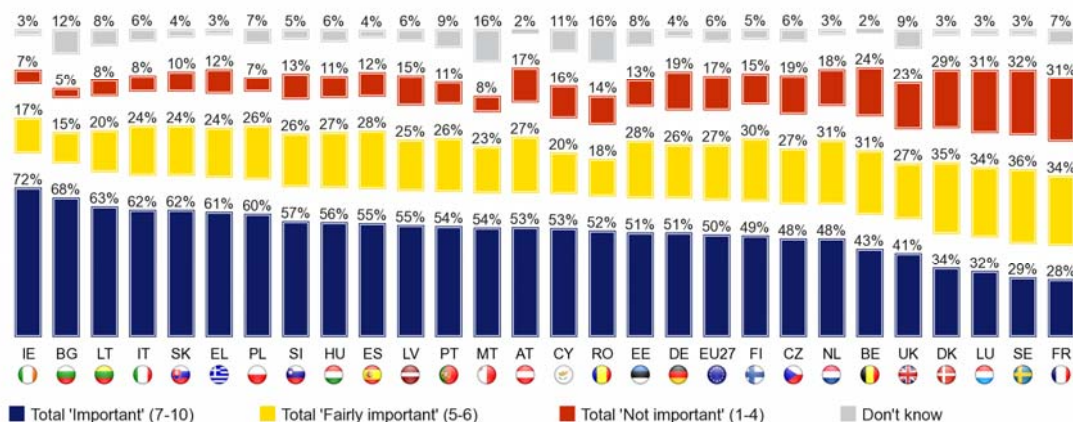
The proportions of respondents who regard improving the quality of the education system as important range from 58% in the United Kingdom to 89% in Malta, with the biggest increases in Sweden (+16), Finland (+12), Italy (+9), Slovenia (+9), Luxembourg (+8), the Netherlands (+7) and Belgium (+7).

The United Kingdom is the only country where less than 50% of respondents say that the research and development initiative is important (47%). Respondents in Bulgaria (79%) are the most likely to see it as important. The perceived importance of this policy has increased sharply in Slovenia (+13), Finland (+12), Belgium (+11), Sweden (+10), Luxembourg (+10), the Netherlands (+10), Italy (+10), France (+9) and Denmark (+9).

In nine Member States, less than half of respondents consider that the development of the digital economy is important (Belgium, the Czech Republic, Denmark, France, Luxembourg, the Netherlands, Finland, Sweden and the United Kingdom); this was the case in 12 Member States in the spring 2012 Eurobarometer survey. An absolute majority of respondents in Germany (51%, +5), Estonia (51%, +3) and Slovenia (57%, +10) now consider that it is important, whereas that was not the case in spring 2012.

QB1.3 (2). 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 develop the e-economy by strengthening ultra fast Internet within the EU



Measures to boost the e-economy are therefore seen as important by an absolute majority of the population in 18 Member States, led by Ireland (72%), Bulgaria (68%) and Lithuania (63%). The idea that it is important to support the digital economy has gained most ground in Italy (+11), Slovenia (+10), the Netherlands (+9), Sweden (+7) and Belgium (+7).

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".

Answers: Total 'Important' (7-10)

		To modernise labour markets, with a view to raising employment levels	To help the poor and socially excluded and enable them to play an active part in society	To support an economy that uses less natural resources and emits less greenhouse gas	To help the EU's industrial base to be more competitive by promoting entrepreneurship and developing new skills	To enhance the quality and appeal of EU's higher education system	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	80%	80%	74%	72%	71%	63%	50%
	EU15	79%	80%	75%	72%	71%	63%	48%
	NMS12	82%	80%	73%	73%	69%	65%	57%
	Euro zone	80%	81%	76%	73%	74%	65%	50%
	Non-Euro zone	80%	78%	70%	70%	66%	59%	49%
	BE	85%	84%	79%	74%	73%	64%	43%
	BG	91%	90%	86%	88%	80%	79%	68%
	CZ	90%	79%	78%	78%	67%	66%	48%
	DK	83%	72%	75%	76%	76%	72%	34%
	DE	83%	82%	82%	70%	83%	69%	51%
	EE	73%	72%	68%	72%	69%	53%	51%
	IE	88%	86%	77%	81%	82%	72%	72%
	EL	88%	90%	81%	78%	81%	72%	61%
	ES	84%	90%	79%	75%	84%	75%	55%
	FR	73%	74%	71%	71%	60%	52%	28%
	IT	74%	73%	70%	71%	65%	63%	62%
	CY	94%	91%	75%	83%	83%	58%	53%
	LV	83%	80%	72%	80%	72%	55%	55%
	LT	80%	83%	78%	80%	77%	68%	63%
	LU	70%	81%	75%	76%	71%	51%	32%
	HU	86%	85%	82%	82%	72%	70%	56%
	MT	90%	92%	84%	79%	89%	68%	54%
	NL	81%	82%	77%	75%	75%	66%	48%
	AT	83%	78%	81%	71%	77%	70%	53%
	PL	76%	76%	66%	65%	61%	60%	60%
	PT	81%	83%	70%	75%	73%	65%	54%
	RO	82%	78%	71%	69%	74%	65%	52%
	SI	95%	91%	80%	88%	71%	74%	57%
	SK	92%	83%	81%	85%	79%	72%	62%
	FI	90%	93%	88%	86%	72%	68%	49%
	SE	80%	87%	93%	83%	83%	77%	29%
	UK	76%	76%	64%	65%	58%	47%	41%

Highest percentage per country

Lowest percentage per country

Highest percentage per item

Lowest percentage per item

II. OPINIONS ON THE EU'S EUROPE 2020 TARGETS

- All the Europe 2020 targets are seen as realistic by a majority of Europeans -

Europeans were then asked to assess the credibility of the targets set by the EU for its Europe 2020 strategy. They could describe these in three ways: "about right", "too ambitious" or "too modest"⁶.

The targets tested are all seen as "about right", i.e. realistic and attainable, by a majority of Europeans. This was also the case in all the previous Eurobarometer surveys in which this question was asked. The trend is broadly stable for this indicator, with the proportion of "about right" answers varying by one percentage point at most since spring 2012.

An absolute majority of respondents consider that six of the eight targets tested are credible.

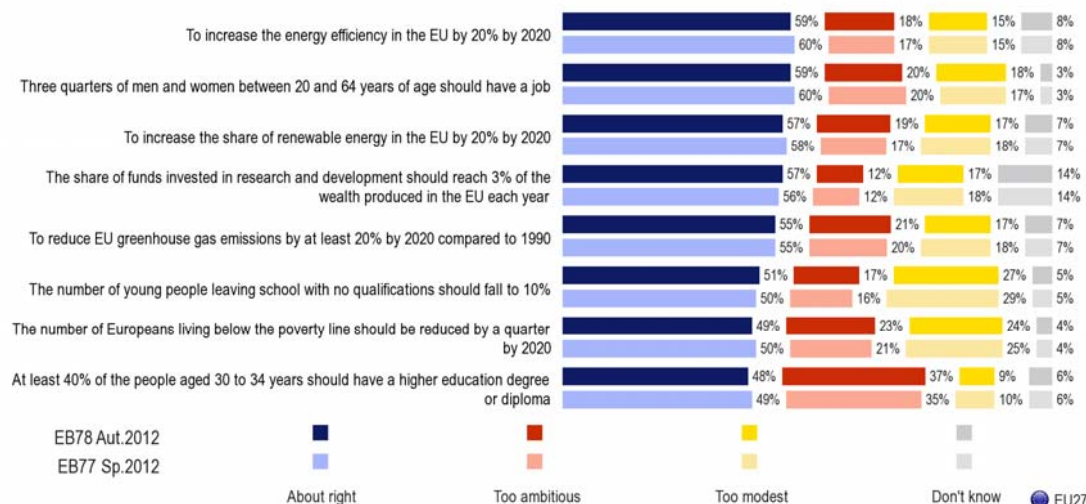
- 59% of Europeans (-1 percentage point since spring 2012) agree that the targets "three-quarters of men and women aged between 20 and 64 should have a job" and "increasing energy efficiency in the EU by 20% by 2020" (also -1) are realistic.
- 57% consider that the targets "increasing the share of renewable energy in the EU by 20% by 2020" (-1) and "the share of funds invested in research and development should reach 3% of the wealth produced in the EU each year" (+1) are credible.
- 55% (unchanged) agree that the target of "reducing EU greenhouse gas emissions by at least 20% by 2020 compared to 1990" is "about right".
- 51% (+1) believe that "reducing the number of young people leaving school with no qualifications to 10%" is a realistic target.

A relative majority of respondents agree on the feasibility of the other two targets:

- 49% (-1) consider that "reducing the number of Europeans living below the poverty line by a quarter by 2020" is a realistic target, while 24% (-1) believe that it is too modest and 23% (+2) too ambitious.
- Lastly, 48% (-1) consider that the target of ensuring that "at least 40% of the people aged 30 to 34 years should have a higher education degree or diploma" is realistic, while 37% (+2) believe that it is too ambitious and 9% (-1) too modest. This is by far the target with the highest percentage of "too ambitious" answers. It is also the target on which national differences are the most marked.

⁶ 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?



An analysis of the long-term trend shows that the Europeans are now slightly less likely to consider that the social targets are realistic. Since the spring 2010 survey (EB73), the perceived realism of the targets for employment, reducing poverty and the education of 30-34 year-olds has declined by four percentage points. The perceived credibility of the target of reducing the number of young people leaving school with no qualifications to 10% has lost two percentage points since spring 2010. By comparison, opinions of the environmental and R&D targets have remained almost unchanged over the same period.

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? - %EU
Answer: About right

	EB73 Sp 2010	EB74 Aut.2010	Diff. Aut.2010 - Sp.2010	EB75 Sp.2011	Diff. Sp.2011 - Aut.2010	EB76 Aut.2011	Diff. Aut.2011 - Sp.2011	Diff. Aut.2011 - Sp.2010	EB77 Sp.2012	Diff. Sp.2012 - Aut.2011	Diff. Sp.2012 - Sp.2010	EB78 Aut.2012	Diff. Aut.2012 - Sp.2012	Diff. Aut.2012 - Sp.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	60%	=	-3	59%	-1	-4
To increase the energy efficiency in the EU by 20% by 2020	60%	59%	-1	60%	+1	60%	=	=	60%	=	=	59%	-1	-1
To increase the share of renewable energy in the EU by 20% by 2020	58%	57%	-1	57%	=	57%	=	-1	58%	+1	=	57%	-1	-1
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	56%	+1	=	57%	+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	55%	+2	=	55%	=	=
The number of young people leaving school with no qualifications should fall to 10%	53%	51%	-2	51%	=	50%	-1	-3	50%	=	-3	51%	+1	-2
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	50%	+1	-3	49%	-1	-4
At least 40% of the people aged 30 to 34 years should have a higher education degree or diploma *	52%	48%	-4	50%	+2	48%	-2	-4	49%	+1	-3	48%	-1	-4

* This item was worded slightly differently up to the spring 2012 (EB77) survey:
"At least 40% of the younger generation should have a degree or diploma"

An analysis of the results at national level reveals that respondents in Greece and Cyprus are far more sceptical than the European average about the realism of these targets. These are the only Member States where none of the eight targets tested are seen as realistic by absolute majority of respondents. This rise in scepticism is particularly perceptible in Cyprus. In contrast, the credibility of most of the targets has increased sharply in Luxembourg.

The national analysis also shows that ensuring that at least 40% of people aged 30 to 34 should have a higher education qualification is clearly the target commanding the least consensus, creating the widest national disparities.

In more detail, **the target of ensuring that three-quarters of men and women aged between 20 and 64 years of age should have a job** is seen as “about right” by an absolute majority in 23 EU Member States – with the highest score in Romania (71%) – and by relative majority in Sweden (48%), the Czech Republic (48%) and Greece (38%). Cyprus stands out as the only country where the realism of the target is ranked in second place (33%, -9), behind “too ambitious” (37%, +8). In contrast, it is much more widely perceived as realistic in Luxembourg (57%, +10).

Increasing energy efficiency in the EU by 20% by 2020 is seen as realistic by absolute majorities in 25 Member States – led by Slovenia (72%) – and by relative majorities in Greece (46%) and Cyprus (46%). This target has gained 14 percentage points in credibility in Ireland and seven in Luxembourg, but has lost nine points in Cyprus.

Increasing the share of renewable energy in the EU by 20% by 2020 is seen as credible by an absolute majority of respondents in almost all the EU countries (with the highest score in Slovenia, 72%); the only exceptions are Greece (44%), Cyprus (45%) and Austria (49%). The credibility of this target has fallen by 11 percentage points in Cyprus and by two in Greece. It has gained ground slightly in Austria (+2). However, respondents in Austria are still the most likely to consider that this target is too modest (35%, -2), followed by Sweden (34%, +1).

The realism of the target of allocating 3% of the wealth produced in the European Union to research & development is supported by an absolute majority of respondents in 23 Member States, led by Finland (66%), and by a relative majority in France (49%), Bulgaria (49%), Greece (44%) and Cyprus (44%). The credibility of this target has gained 11 percentage points in Luxembourg and eight in Italy and Ireland, but has fallen by eight points in Cyprus.

The target of reducing EU greenhouse gas emissions by 20% compared to 1990 is considered realistic by an absolute majority of respondents in 20 EU Member States, led by Italy (64%).

A relative majority of respondents consider that it is “about right” in the seven other EU countries: the Netherlands (49%), the Czech Republic (48%), Belgium (47%), Sweden (44%), Luxembourg (43%), Cyprus (42%) and Greece (40%).

Above average proportions of respondents see the target as 'too modest' in Sweden (38%) and Austria (33%).

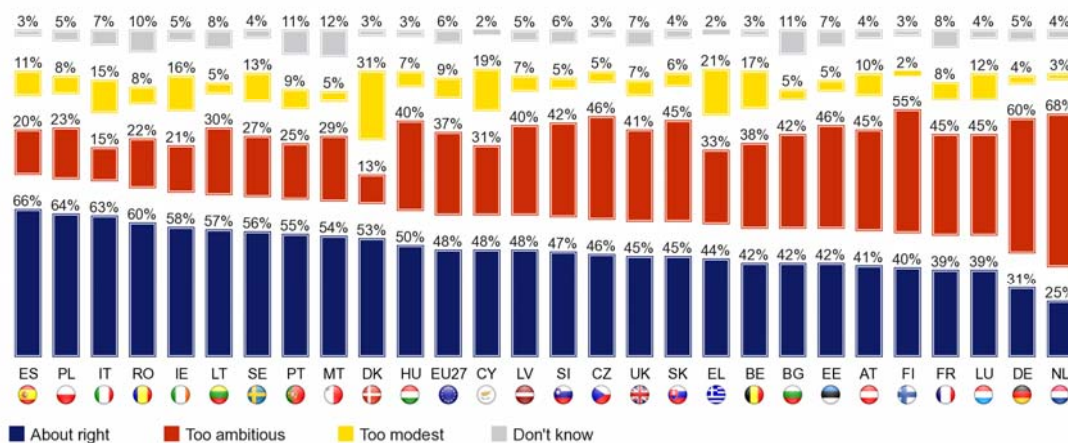
As in the previous Eurobarometer survey in spring 2012, Sweden in particular also stands out in its assessment of the target of **reducing the number of young people leaving school with no qualifications to 10%**, being the only EU country in which a majority of respondents consider that this target is too modest (54%). Absolute majorities in 17 EU Member States say that this target is realistic, with the highest score in Poland (65%). Although "about right" is the predominant answer, respondents in Greece (37% answered "about right", compared with an EU average of 51%), Germany (40%) and France (41%) are more sceptical than the European average about the realism of this target. We also note that, in addition to Sweden, more than a third of respondents in seven countries consider that this target is too modest: Germany (41%), Austria (38%), Latvia (37%), Belgium (35%), Luxembourg (35%), the Czech Republic (34%) and France (34%).

The target of **reducing the number of EU citizens living in poverty by a quarter** is not predominantly seen as realistic in three EU Member States: Sweden (44% replied "too modest", while 40% said "about right" and 13% "too ambitious"), Greece (35% replied "too modest" and "too ambitious", compared with 28% for "about right") and Cyprus (49% replied "too ambitious", compared with 29% for "too modest" and 21% for "about right"). The proportion of respondents who consider that this target is too ambitious has increased by 13 percentage points in Cyprus since spring 2012. It is seen as realistic by a relative majority of respondents in 13 Member States, and by an absolute majority in 11 others, with the highest score in Lithuania (63%).

Lastly, **ensuring that at least 40% of people aged 30 to 34 should have a higher education degree or diploma** is clearly the most divisive target, with significant differences between countries. In seven countries, this target is seen as too ambitious, either by an absolute majority – the Netherlands (68%), Germany (60%) and Finland (55%) – or by a relative majority – Estonia (46%, compared with 42% who think that it is "about right"), France (45% versus 39%), Luxembourg (45% versus 39%) and Austria (45% versus 41%). The view that this target is too ambitious has gained significant ground in Finland: +20 percentage points since spring 2012.

QB2.7. 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?





























At least 40% of the people aged 30 to 34 years should have a higher education degree or diploma



In three countries, opinions are equally divided: the Czech Republic (46% think that it is too ambitious while 46% say it is “about right”), Slovakia (45% versus 45%) and Bulgaria (42% versus 42%).

In the 17 other Member States, respondents are most likely believe that that it is “about right”, with an absolute majority in 11 countries. The highest score was recorded in Spain (66%).

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?
Answer: About right

		Three quarters of men and women between 20 and 64 years of age should have a job	To increase the energy efficiency in the EU by 20% by 2020	The share of funds invested in research and development should reach 3% of the wealth produced in the EU each year	To increase the share of renewable energy in the EU by 20% by 2020	To reduce EU greenhouse gas emissions by at least 20% by 2020 compared to 1990	The number of young people leaving school with no qualifications should fall to 10%	The number of Europeans living below the poverty line should be reduced by a quarter by 2020	At least 40% of the people aged 30 to 34 years should have a higher education degree or diploma
	EU27	59%	59%	57%	57%	55%	51%	49%	48%
	BE	51%	53%	55%	51%	47%	43%	40%	42%
	BG	61%	54%	49%	53%	53%	50%	49%	42%
	CZ	48%	57%	60%	54%	48%	47%	38%	46%
	DK	61%	66%	65%	59%	51%	56%	50%	53%
	DE	55%	56%	58%	52%	50%	40%	43%	31%
	EE	61%	61%	53%	57%	54%	51%	48%	42%
	IE	60%	65%	59%	62%	56%	59%	54%	58%
	EL	38%	46%	44%	44%	40%	37%	28%	44%
	ES	60%	65%	58%	65%	63%	57%	54%	66%
	FR	56%	59%	49%	53%	50%	41%	39%	39%
	IT	69%	63%	65%	64%	64%	63%	59%	63%
	CY	33%	46%	44%	45%	42%	45%	21%	48%
	LV	58%	63%	62%	63%	59%	50%	55%	48%
	LT	62%	70%	64%	67%	63%	56%	63%	57%
	LU	57%	55%	50%	50%	43%	43%	38%	39%
	HU	54%	58%	56%	50%	52%	48%	38%	50%
	MT	64%	61%	52%	63%	60%	57%	52%	54%
	NL	54%	57%	50%	53%	49%	50%	46%	25%
	AT	56%	53%	56%	49%	50%	46%	44%	41%
	PL	64%	66%	64%	66%	63%	65%	59%	64%
	PT	60%	57%	56%	59%	52%	55%	48%	55%
	RO	71%	58%	53%	60%	58%	59%	60%	60%
	SI	65%	72%	61%	72%	60%	64%	57%	47%
	SK	51%	58%	56%	57%	54%	58%	43%	45%
	FI	57%	65%	66%	59%	57%	58%	49%	40%
	SE	48%	56%	56%	50%	44%	36%	40%	56%
	UK	62%	57%	53%	56%	55%	50%	50%	45%
Highest percentage per country		Lowest percentage per country							
Highest percentage per item		Lowest percentage per item							

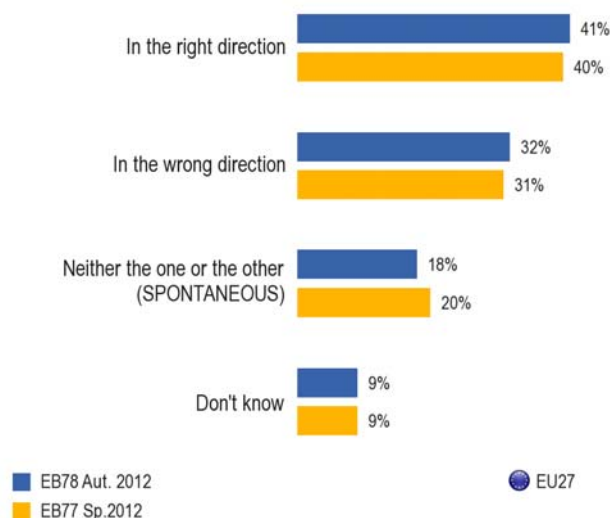
III. THE DIRECTION TAKEN BY THE EU TO TACKLE THE CRISIS

- A relative majority of Europeans feel that the European Union is going in the right direction to emerge from the crisis, with levels more or less unchanged since spring 2012 -

Just over four out of ten Europeans (41%, +1 percentage point since spring 2012) consider that the EU is going in the right direction to emerge from the crisis and face the new world challenges, while 32% (+1) consider that the EU is going in the wrong direction. 18% (-2) answered spontaneously that the EU is going in neither the right direction nor the wrong direction and 9% (unchanged) expressed no opinion⁷.

The positive-negative ratio is therefore +9 (unchanged in comparison to spring 2012), slightly higher than in the autumn 2011 Standard Eurobarometer (EB76) survey, +7, but still far below the level of the autumn 2010 Eurobarometer (EB74) survey, +23.

QB3. 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?



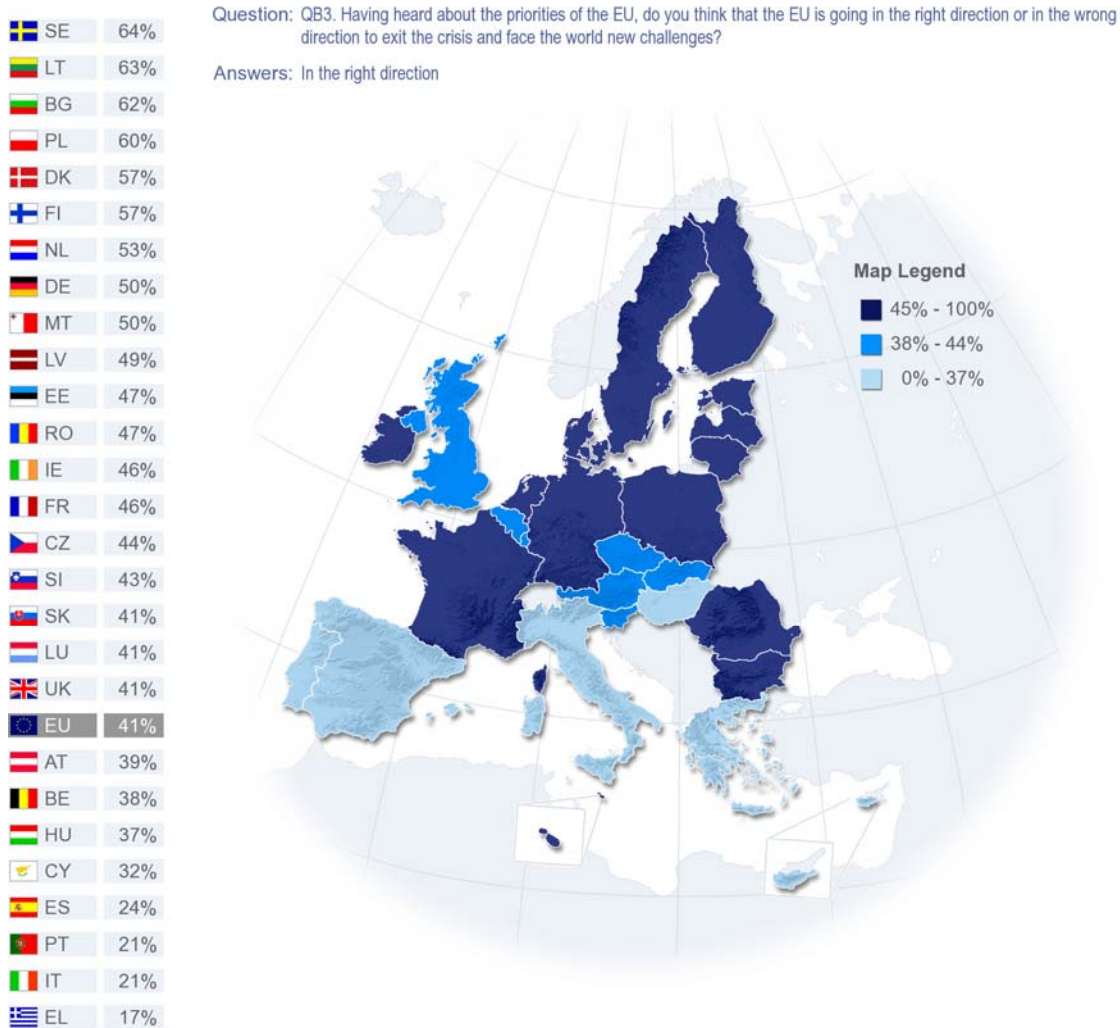
While the differences between positive and negative opinions on the EU's crisis recovery strategy are fairly narrow in the EU15 countries (38% versus 35%) and the euro area countries (37% versus 33%), they are far more emphatic in the non-euro area countries (49% versus 29%) and the NMS12 (52% versus 23%). The opinion ratios have not changed significantly in these four groups of countries.

In two countries there has been a sharp rise in disapproval of the EU's crisis recovery strategy, by eleven and seven percentage points respectively, reversing the opinion in Belgium (43% negative opinions versus 38% of positive opinions, compared with 32% versus 44% in spring 2012) and in Cyprus (33% versus 32%, compared with 26% versus 41%). These two countries are now part of the group of Member States in which disapproval is dominant, alongside Greece (61%, +5), Spain (53%, +7), Portugal (50%, +12) and Italy (37%, -1, versus 21%).

In this survey, the opinion ratio is in balance in the United Kingdom (41% versus 41%) whereas it was slightly negative in spring 2012 (38% positive opinions versus 40% negative opinions).

⁷ QB3. 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 new world challenges?

Therefore, respondents in 20 Member States approve of the direction taken by the European Union to overcome the crisis, by an absolute majority in nine: Sweden (64%), Lithuania (63%), Bulgaria (62%), Poland (60%), Denmark (57%), Finland (57%), the Netherlands (53%), Germany (50%) and Malta (50%); and by a relative majority in 11: Latvia (49% of positive opinions versus 13% of negative opinions), Estonia (47% versus 15%), Romania (47% versus 19%), Ireland (46% versus 25%), France (46% versus 33%), the Czech Republic (44% versus 31%), Slovenia (43% versus 26%), Luxembourg (41% versus 34%), Slovakia (41% versus 35%), Austria (39% versus 24%) and Hungary (37% versus 33%).































Within this group of countries, approval of the EU's crisis recovery policy has increased significantly in Ireland (+13), Bulgaria (+9) and Poland (+8), while falling sharply in Romania (-7) and Estonia (-5).

This survey reveals a clear trend towards consolidation of support for the EU's crisis recovery policy in the countries where it was already strongest; in parallel, there is a significant increase in disapproval in the countries where this was already well-established, except in Italy where support has increased by four percentage points.

These two trends have therefore accentuated the national differences in perceptions of the European Union's policy to overcome the economic and financial crisis.

QB3 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?
+ Diff. Aut.2012 - Sp.2012

		In the right direction		In the wrong direction		Neither the one or the other (SPONT.)		Don't know	
	EU27	40%	+2	31%	=	20%	=	9%	-2
	SE	64%	+1	21%	+1	7%	-3	8%	+1
	LT	63%	-1	11%	=	12%	-1	14%	+2
	BG	62%	+9	8%	-1	21%	-6	9%	-2
	PL	60%	+8	23%	+4	12%	-8	5%	-4
	DK	57%	+2	27%	-2	9%	=	7%	=
	FI	57%	+2	23%	-4	14%	+4	6%	-2
	NL	53%	+5	27%	-5	7%	-2	13%	+2
	DE	50%	=	16%	-4	27%	+1	7%	+3
	MT	50%	+4	18%	-1	19%	-1	13%	-2
	LV	49%	-1	13%	-2	25%	+2	13%	+1
	EE	47%	-5	15%	+3	28%	+2	10%	=
	RO	47%	-7	19%	+2	21%	+6	13%	-1
	IE	46%	+13	25%	+5	17%	-21	12%	+3
	FR	46%	+1	33%	+5	11%	-4	10%	-2
	CZ	44%	+2	31%	-1	17%	=	8%	-1
	SI	43%	+2	26%	-2	24%	-1	7%	+1
	LU	41%	-3	34%	+8	17%	-5	8%	=
	SK	41%	-2	35%	+3	19%	-2	5%	+1
	UK	41%	+3	41%	+1	8%	-2	10%	-2
	AT	39%	+1	24%	+3	34%	-4	3%	=
	BE	38%	-6	43%	+11	17%	-5	2%	=
	HU	37%	-2	33%	+1	20%	+1	10%	=
	CY	32%	-9	33%	+7	22%	-1	13%	+3
	ES	24%	=	53%	+7	14%	-6	9%	-1
	IT	21%	+4	37%	-1	30%	-4	12%	+1
	PT	21%	-6	50%	+12	22%	-2	7%	-4
	EL	17%	-5	61%	+5	20%	=	2%	=

A socio-demographic analysis reveals some differences: as with most of the indicators relating to perceptions of the EU and its policies, the indicator relating to the EU's crisis recovery policy reflects significant differences depending on the respondent's age, level of education and socio-demographic conditions.

Respondents in the 15-24 age group (50% of positive opinions versus 27% of negative opinions) are thus far more likely than respondents aged 55 or over (39% versus 32%) to approve of the EU's crisis recovery policy.

The most educated categories (48% of the longest-educated respondents say that the EU is going in the right direction while 30% take the opposite view), managers (52% versus 28%), people who almost never have difficulties paying their bills (47% versus 28%) and the categories who place themselves in the "higher class" of society (57% versus 25%)⁸ are most likely to approve of the policy.

Conversely, approval is much less widespread in the categories who studied the least (29%, versus 38% disapproval among people who left school before the age of 16), unemployed people (32% versus 42%), people with financial difficulties (26% versus 45% among those who struggle to pay their bills most of the time) and those towards the bottom of the social scale (35% versus 37% among those who consider that they are "working class").

⁸ Note, however, that the number of respondents who consider that they belong to the "higher class" of society is low (n=685). As a consequence, the results must be treated with caution.

QB3 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)	Don't know
EU27	41%	32%	18%	9%

Gender

Male	42%	34%	17%	7%
Female	41%	30%	18%	11%

Age

15-24	50%	27%	16%	7%
25-39	41%	32%	19%	8%
40-54	40%	35%	17%	8%
55 +	39%	32%	18%	11%

Education (End of)

15-	29%	38%	21%	12%
16-19	40%	32%	19%	9%
20+	48%	30%	15%	7%
Still studying	54%	23%	16%	7%

Occupation scale

Self-employed	39%	35%	19%	7%
Managers	52%	28%	15%	5%
Other white collars	43%	31%	19%	7%
Manual workers	39%	34%	18%	9%
House persons	36%	32%	21%	11%
Unemployed	32%	42%	17%	9%
Retired	40%	31%	18%	11%
Students	54%	23%	16%	7%

Difficulties paying bills

Most of the time	26%	45%	19%	10%
From time to time	36%	35%	20%	9%
Almost never	47%	28%	16%	9%

Consider belonging to

The working class	35%	37%	18%	10%
The middle class	47%	28%	17%	8%
The upper class	57%	25%	14%	4%

My voice counts in the EU

Agree	60%	20%	14%	6%
Disagree	32%	39%	20%	9%

TECHNICAL SPECIFICATIONS

Between the 3rd and the 18th of November, TNS Opinion & Social, a consortium created between TNS plc and TNS opinion, carried out the wave 78.1 of the EUROBAROMETER survey, on request of the EUROPEAN COMMISSION, Directorate-General for Communication, "Research and Speechwriting".

The wave 78.1 is the STANDARD EUROBAROMETER 78 survey and covers the population of the respective nationalities of the European Union Member States, resident in each of the Member States and aged 15 years and over.

The STANDARD EUROBAROMETER 78 survey has also been conducted in the six candidate countries (Croatia, Turkey, the Former Yugoslav Republic of Macedonia, Iceland, Montenegro and Serbia) and in the Turkish Cypriot Community. In these countries, the survey covers the national population of citizens and the population of citizens of all the European Union Member States that are residents in these countries and have a sufficient command of the national languages to answer the questionnaire.

The basic sample design applied in all states is a multi-stage, random (probability) one. In each country, a number of sampling points was drawn with probability proportional to population size (for a total coverage of the country) and to population density.

In order to do so, the sampling points were drawn systematically from each of the "administrative regional units", after stratification by individual unit and type of area. They thus represent the whole territory of the countries surveyed according to the EUROSTAT NUTS II (or equivalent) and according to the distribution of the resident population of the respective nationalities in terms of metropolitan, urban and rural areas. In each of the selected sampling points, a starting address was drawn, at random. Further addresses (every Nth address) were selected by standard "random route" procedures, from the initial address. In each household, the respondent was drawn, at random (following the "closest birthday rule"). All interviews were conducted face-to-face in people's homes and in the appropriate national language. As far as the data capture is concerned, CAPI (*Computer Assisted Personal Interview*) was used in those countries where this technique was available.

For each country a comparison between the sample and the universe was carried out. The Universe description was derived from Eurostat population data or from national statistics offices. For all countries surveyed, a national weighting procedure, using marginal and intercellular weighting, was carried out based on this Universe description. In all countries, gender, age, region and size of locality were introduced in the iteration procedure. For international weighting (i.e. EU averages), TNS Opinion & Social applies the official population figures as provided by EUROSTAT or national statistic offices. The total population figures for input in this post-weighting procedure are listed above.

Readers are reminded that survey results are estimations, the accuracy of which, everything being equal, rests upon the sample size and upon the observed percentage. With samples of about 1,000 interviews, the real percentages vary within the following confidence limits:

Statistical Margins due to the sampling process (at the 95% level of confidence)											
various sample sizes are in rows					various observed results are in columns						
	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	
	95%	90%	85%	80%	75%	70%	65%	60%	55%	50%	
N=50	6,0	8,3	9,9	11,1	12,0	12,7	13,2	13,6	13,8	13,9	N=50
N=500	1,9	2,6	3,1	3,5	3,8	4,0	4,2	4,3	4,4	4,4	N=500
N=1000	1,4	1,9	2,2	2,5	2,7	2,8	3,0	3,0	3,1	3,1	N=1000
N=1500	1,1	1,5	1,8	2,0	2,2	2,3	2,4	2,5	2,5	2,5	N=1500
N=2000	1,0	1,3	1,6	1,8	1,9	2,0	2,1	2,1	2,2	2,2	N=2000
N=3000	0,8	1,1	1,3	1,4	1,5	1,6	1,7	1,8	1,8	1,8	N=3000
N=4000	0,7	0,9	1,1	1,2	1,3	1,4	1,5	1,5	1,5	1,5	N=4000
N=5000	0,6	0,8	1,0	1,1	1,2	1,3	1,3	1,4	1,4	1,4	N=5000
N=6000	0,6	0,8	0,9	1,0	1,1	1,2	1,2	1,2	1,3	1,3	N=6000
N=7000	0,5	0,7	0,8	0,9	1,0	1,1	1,1	1,1	1,2	1,2	N=7000
N=7500	0,5	0,7	0,8	0,9	1,0	1,0	1,1	1,1	1,1	1,1	N=7500
N=8000	0,5	0,7	0,8	0,9	0,9	1,0	1,0	1,1	1,1	1,1	N=8000
N=9000	0,5	0,6	0,7	0,8	0,9	0,9	1,0	1,0	1,0	1,0	N=9000
N=10000	0,4	0,6	0,7	0,8	0,8	0,9	0,9	1,0	1,0	1,0	N=10000
N=11000	0,4	0,6	0,7	0,7	0,8	0,9	0,9	0,9	0,9	0,9	N=11000
N=12000	0,4	0,5	0,6	0,7	0,8	0,8	0,9	0,9	0,9	0,9	N=12000
N=13000	0,4	0,5	0,6	0,7	0,7	0,8	0,8	0,8	0,9	0,9	N=13000
N=14000	0,4	0,5	0,6	0,7	0,7	0,8	0,8	0,8	0,8	0,8	N=14000
N=15000	0,3	0,5	0,6	0,6	0,7	0,7	0,8	0,8	0,8	0,8	N=15000
	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	
	95%	90%	85%	80%	75%	70%	65%	60%	55%	50%	

ABBR.	COUNTRIES	INSTITUTES	N° INTERVIEWS	FIELDWORK DATES		POPULATION 15+
BE	Belgium	TNS Dimarso	1.031	03/11/2012	18/11/2012	8.866.411
BG	Bulgaria	TNS BBSS	1.020	03/11/2012	11/11/2012	6.584.957
CZ	Czech Rep.	TNS Aisa	1.003	03/11/2012	14/11/2012	8.987.535
DK	Denmark	TNS Gallup DK	1.001	03/11/2012	18/11/2012	4.533.420
DE	Germany	TNS Infratest	1.562	03/11/2012	18/11/2012	64.545.601
EE	Estonia	Emor	1.003	03/11/2012	18/11/2012	916.000
IE	Ireland	IMS Millward Brown	1.000	03/11/2012	18/11/2012	3.375.399
EL	Greece	TNS ICAP	1.001	03/11/2012	17/11/2012	8.693.566
ES	Spain	TNS Demoscopia	1.006	03/11/2012	18/11/2012	39.035.867
FR	France	TNS Sofres	1.008	03/11/2012	18/11/2012	47.620.942
IT	Italy	TNS Infratest	1.032	03/11/2012	18/11/2012	51.252.247
CY	Rep. of Cyprus	Synovate	503	03/11/2012	18/11/2012	651.400
LV	Latvia	TNS Latvia	1.011	03/11/2012	18/11/2012	1.448.719
LT	Lithuania	TNS LT	1.019	03/11/2012	18/11/2012	2.849.359
LU	Luxembourg	TNS ILReS	502	03/11/2012	17/11/2012	404.907
HU	Hungary	TNS Hoffmann Kft	1.028	03/11/2012	18/11/2012	8.320.614
MT	Malta	MISCO	500	03/11/2012	18/11/2012	335.476
NL	Netherlands	TNS NIPO	1.016	03/11/2012	18/11/2012	13.288.200
AT	Austria	Österreichisches Gallup-Institut	993	03/11/2012	18/11/2012	6.973.277
PL	Poland	TNS OBOP	1.000	03/11/2012	18/11/2012	32.306.436
PT	Portugal	TNS EUROTESTE	1.015	03/11/2012	18/11/2012	8.080.915
RO	Romania	TNS CSOP	1.014	03/11/2012	13/11/2012	18.246.731
SI	Slovenia	RM PLUS	1.014	03/11/2012	18/11/2012	1.748.308
SK	Slovakia	TNS Slovakia	1.000	03/11/2012	18/11/2012	4.549.954
FI	Finland	TNS Gallup Oy	1.007	03/11/2012	18/11/2012	4.412.321
SE	Sweden	TNS GALLUP	1.029	03/11/2012	18/11/2012	7.723.931
UK	United Kingdom	TNS UK	1.304	03/11/2012	18/11/2012	51.081.866
TOTAL EU27			26.622	03/11/2012	18/11/2012	406.834.359
CY(tcc)	Turkish Cypriot Community	Kadem	500	03/11/2012	18/11/2012	143.226
HR	Croatia	Puls	1.000	03/11/2012	18/11/2012	3.749.400
TR	Turkey	TNS PIAR	1.000	03/11/2012	18/11/2012	52.728.513
MK	Former Yugoslav Rep. of Macedonia	TNS Brima	1.056	03/11/2012	09/11/2012	1.678.404
IS	Iceland	Capacent	502	03/11/2012	18/11/2012	252.277
ME	Montenegro	TNS Medium Gallup	1.017	03/11/2012	15/11/2012	492.265
RS	Serbia	TNS Medium Gallup	1.034	03/11/2012	15/11/2012	6.409.693
TOTAL			32.731	03/11/2012	18/11/2012	472.288.137