Standard Eurobarometer 79
Spring 2013

EUROPE 2020

REPORT

Fieldwork: May 2013

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

Standard Eurobarometer 79 / Spring 2013 – TNS opinion & social

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Europe 2020

Survey 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 (DG COMM "Research and Speechwriting" Unit)

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INTRODUCTION

In March 2010, the European Commission launched the Europe 2020 strategy framework in order to overcome the economic and financial crisis, to prepare the European economy for the challenges of the future[1] and to establish the conditions for innovative, sustainable and inclusive growth for the benefit of citizens as a whole.

The way in which European public opinion judges this strategy has been measured since the Standard Eurobarometer of spring 2010 (EB73). In this new spring 2013 survey (EB79), three indicators are used to assess this opinion. The first measures the importance which Europeans attach to the European Commission's seven Europe 2020 strategy initiatives. The second considers public perceptions of how realistic the targets for 2020 are. Finally, the third indicator quantifies public approval of the direction taken by the European Union in order to emerge from the crisis.

Since spring 2010, the Europe 2020 strategy indicators have been characterised by a marked stability. The most recent Eurobarometer survey is no exception.

This Standard Eurobarometer survey was conducted between 10 and 26 May 2013 in 34 countries or territories: 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 in the Turkish Cypriot Community in the part of the country that is not controlled by the government of the Republic of Cyprus. Questions on the Europe 2020 strategy were only asked in the 27 Member States of the European Union at the time of the survey, and in Croatia.

As the survey was conducted before Croatia's accession to the European Union on 1 July 2013, our general and socio-demographic analysis of the results is based on the EU27 average. This average has been weighted to reflect 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 of the survey.

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

The methodology used is that of the Eurobarometer surveys conducted on behalf of the Directorate-General for Communication ("Research and Speechwriting" Unit)[2]. A technical note concerning the interviews carried out by the institutes within the TNS Opinion & Social network is annexed to this report. This note also describes the confidence intervals[3].

The abbreviations used in this report correspond to:

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	The United Kingdom
CY (tcc)	Turkish Cypriot Community		
HR	Croatia	EU27	European Union – weighted average of 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 area	BE, FR, IT, LU, DE, AT, ES, PT, IE, NL, FI, EL, EE, SI, CY, MT, SK
RS	Serbia	Non-euro area	BG, CZ, DK, LV, LT, HU, PL, RO, SE, UK

* EU15 refers to the 15 countries that formed the European Union before the 2004 and 2007 enlargements

** The NMS12 are the 12 "new Member States" which joined the European 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. 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)" category (tcc: Turkish Cypriot Community).

**** Provisional abbreviation which in no way prejudges 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 the people interviewed throughout Europe who took the time to take part in this survey.

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

[2] http://ec.europa.eu/public_opinion/index_en.htm
[3] 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 EUROPEAN UNION'S EUROPE 2020 INITIATIVES

This Eurobarometer Standard of spring 2013 first asked respondents about the importance of the seven initiatives set out by the European Union[4] in its Europe 2020 strategy to overcome the economic and financial crisis and prepare for the future of the EU. They were asked to give each initiative a score of between 1 and 10, where 1 means "not at all important" and 10 means "very important". The scores were then aggregated into three response categories: "important" for scores of 7 to 10, "fairly important" for scores 5 and 6 and "not important" for scores between 1 and 4.

This indicator has been extremely stable since it was introduced in spring 2010 (EB73). It therefore appears to be broadly independent of the economic and political circumstances in the different countries of the European Union. The present survey records only minor evolutions since autumn 2012 (EB78). Judgments of two of the seven initiatives are unchanged, while the remaining five record a small two-point fall. Coming in the wake of a slight upward shift between spring 2012 (EB77) and autumn 2012 (EB78), these evolutions cancel each other out, resulting in very stable opinions over the year. This confirms the strong demand of Europeans, evident in previous surveys, for EU action in the areas of employment, sustainable development, competitiveness and combatting poverty.

As during the autumn 2012 survey, an absolute majority of respondents regard all the initiatives tested as important. Social measures (employment and combatting exclusion) and environmental initiatives (support for a sustainable economy) continue to top the list, ahead of measures to support competitiveness, education and innovation. Since the introduction of this indicator in the spring 2010 Eurobarometer (EB73), employment, combatting exclusion and sustainable development have always been the three Europe 2020 initiatives perceived as most important by Europeans.

In more detail, **eight in ten Europeans say it is important "to modernise labour markets** with a view to raising employment levels" (80%, no change since autumn 2012).

More than three-quarters say it is important "to help the poor and socially excluded and enable them to play an active part in society" (78%, -2).

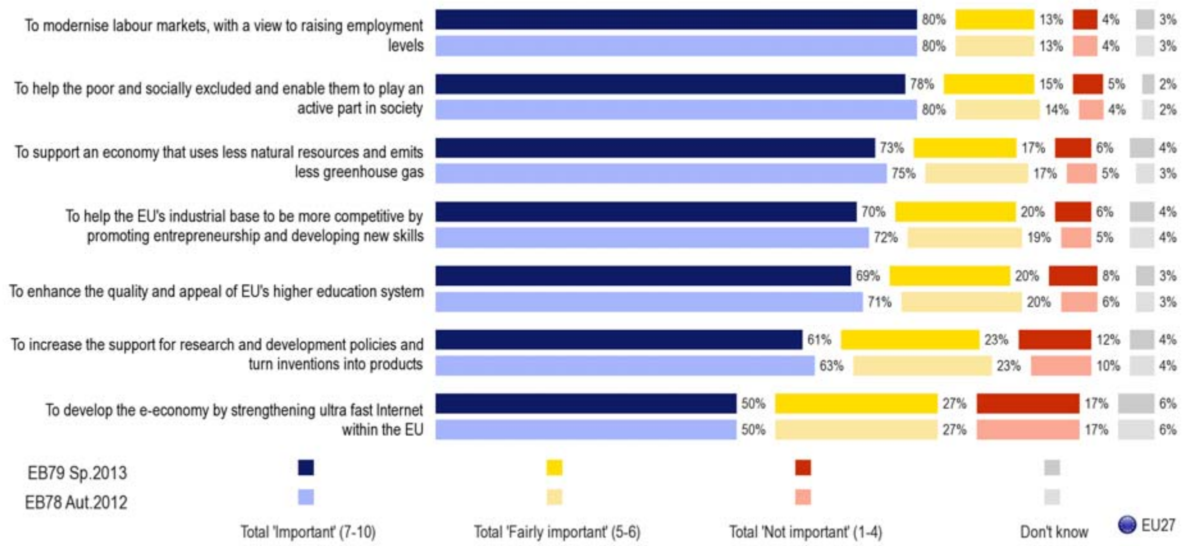
At least seven in ten respondents believe it is important "to support an economy that uses less natural resources and emits less greenhouse gas" (73%, -2) **and "to help the EU's industrial base to be more competitive** by promoting entrepreneurship and developing new skills" (70%, -2).

[4] 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".

More than six in ten respondents agree on the importance of initiatives "to enhance the quality and appeal of the EU's higher education system" (69%, -2) **and "to increase support for research and development policies and turn inventions into products"** (61%, -2).

Finally, half of Europeans (50%, no change) believe that it is important **"to develop the e-economy by strengthening ultra-fast Internet within the EU"**.

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".



It is a sign of the consensus in European opinion regarding the Europe 2020 initiatives that **six of these seven initiatives** (modernising the labour market, combatting exclusion, supporting sustainable development, increasing competitiveness, improving the higher education system and supporting research policies) **appear important to an absolute majority of respondents in every EU country** (with the sole exception of France in the case of support for research policies). However, the development of the e-economy gives rise to real differences of opinion from one country to another: respondents in the NMS12 countries (58%) are significantly more likely than EU15 respondents (48%) to regard this initiative as important.

At least 70% of respondents agree on the importance of the initiatives to promote employment and social inclusion in each of the 27 countries of the European Union. Scores for the importance of modernising the labour market and increasing employment range from 71% in Luxembourg to 94% in Slovenia. The importance of promoting the social inclusion of vulnerable people was acknowledged by proportions ranging from 72% in France, Italy and the United Kingdom to 92% in Bulgaria and Slovenia. For these two dimensions, the only notable evolution relates to Belgium. The perceived importance of these two initiatives had gained significant ground in the autumn 2012 survey (EB78) (by 10 and 6 percentage points respectively); in this new survey, they have fallen back by similar proportions to their spring 2012 level (EB77).

At least 60% of respondents in every EU country say that it is important to support a sustainable economy which emits less greenhouse gas (from 63% in the United Kingdom to 88% in Bulgaria and Sweden) and **to help competitiveness by promoting entrepreneurship** (from 62% in the United Kingdom to 92% in Bulgaria). The perceived importance of supporting a sustainable economy has risen by eight percentage points in Poland and seven in Estonia, but has declined by 11 points in Ireland. The perceived importance of promoting competitiveness has fallen significantly in Ireland (-11) and Sweden (-9).

More than half of respondents in each of the 27 Member States say that it is important to improve the quality of the higher education system, with percentages ranging from 54% in France to 85% in Spain. The perceived importance of this initiative has declined significantly in Ireland (-10), Sweden (-9), Belgium (-8), Malta (-6) and France (-6).

France stands out in the case of support for research and innovation, being the only country where fewer than half the respondents believe this initiative to be important (46%). At the other end of the scale, respondents are most likely to regard this initiative as important in Bulgaria (79%). The perceived importance of this initiative has declined in Finland (-9), the Netherlands (-7), Belgium (-6) and France (-6).

Finally, **the development of the e-economy appears to be of secondary importance in eight countries where only a minority of respondents say that this initiative is important** (Belgium, the Czech Republic, Denmark, France, Luxembourg, the Netherlands, Sweden and the United Kingdom). A majority of respondents perceive measures to promote the e-economy as important in 19 countries, led by Bulgaria (71%), Greece (70%) and Ireland (69%). The view that it is important to support the e-economy has gained significant ground in Denmark (+9), Greece (+9) and Malta (+8).

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' that it is "very important". 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%	78%	73%	70%	69%	61%	50%
EU15	79%	78%	73%	69%	69%	60%	48%
NMS12	84%	81%	76%	75%	69%	64%	58%
EURO AREA	81%	79%	74%	71%	71%	62%	51%
NON-EURO AREA	79%	77%	72%	70%	66%	59%	49%
BE	76%	**77%**	71%	67%	65%	58%	*41%*
BG	**93%**	92%	88%	92%	82%	79%	*71%*
CZ	**88%**	74%	77%	75%	64%	61%	*46%*
DK	**80%**	73%	74%	75%	78%	69%	*42%*
DE	**85%**	81%	81%	69%	80%	67%	*54%*
EE	**78%**	77%	75%	74%	69%	58%	*53%*
IE	83%	**85%**	*66%*	70%	72%	68%	69%
EL	**90%**	88%	85%	79%	84%	74%	*70%*
ES	86%	**90%**	80%	77%	85%	71%	*50%*
FR	**72%**	**72%**	65%	65%	54%	46%	*32%*
IT	**75%**	72%	68%	70%	62%	*59%*	63%
CY	**93%**	91%	72%	84%	80%	*57%*	58%
LV	**83%**	78%	66%	77%	70%	*54%*	55%
LT	79%	**81%**	76%	78%	73%	67%	*63%*
LU	71%	**76%**	74%	69%	70%	50%	*32%*
HU	**83%**	**83%**	80%	79%	67%	65%	*52%*
MT	87%	**90%**	80%	80%	83%	66%	*62%*
AT	81%	78%	**83%**	67%	76%	68%	*52%*
NL	**79%**	78%	74%	71%	71%	60%	*43%*
PL	**81%**	79%	73%	69%	65%	61%	*59%*
PT	**84%**	**84%**	68%	74%	70%	62%	*53%*
RO	**84%**	80%	74%	73%	74%	64%	*58%*
SI	**94%**	92%	83%	89%	67%	70%	*59%*
SK	**90%**	78%	77%	80%	75%	67%	*61%*
FI	**88%**	87%	80%	84%	67%	59%	*50%*
SE	79%	87%	**88%**	74%	74%	72%	*26%*
UK	**72%**	**72%**	63%	62%	60%	50%	*40%*
HR	83%	85%	78%	76%	76%	68%	64%

Highest percentage per country *Lowest percentage per country*

Highest percentage per item Lowest percentage per item

II. OPINIONS ON THE EUROPEAN UNION'S 2020 TARGETS

After they had assessed the importance of the seven Europe 2020 strategy initiatives, Europeans were asked to say how credible they found the quantitative targets set by the European Union under the strategy. Each of the targets could be assessed as "about right", "too ambitious" or "too modest"[5].

Like the indicator measuring the importance of the initiatives, the indicator of the credibility of the targets has remained very stable over time. As in all the previous Eurobarometer surveys, the targets tested are all considered to be "about right", meaning that they are seen as realistic and attainable, by a majority of Europeans. There are very few short-term evolutions (since the autumn 2012 Eurobarometer) for this indicator. They are a little more noticeable in the longer term.

Six of the eight targets are considered credible by an absolute majority of respondents:

- 59% of Europeans (no change since autumn 2012) say that the targets aiming "to increase energy efficiency in the EU by 20% by 2020" and stating that "three-quarters of men and women between 20 and 64 years of age should have a job" are credible.

- 57% (no change) agree that it is realistic "to increase the share of renewable energy in the EU by 20% by 2020".

- 56% (-1 percentage point) say that "the share of funds invested in research and development should reach 3% of the wealth produced in the EU each year" is a feasible target.

- 54% (-1) believe that it is realistic to aim "to reduce EU greenhouse gas emissions by at least 20% by 2020 compared to 1990".

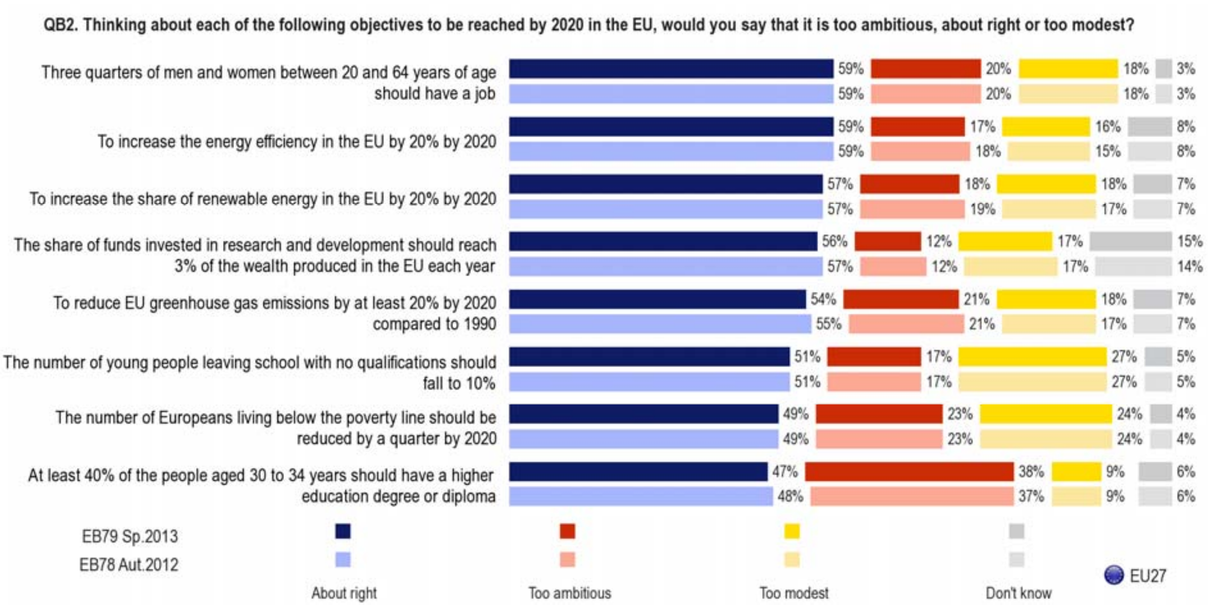
- 51% (no change) say that "the number of young people leaving school with no qualifications should fall to 10%" is "about right" as a target.

The final two targets are regarded as credible by relative majorities of respondents:

- 49% (no change) believe that "the number of Europeans living below the poverty line should be reduced by a quarter by 2020" is a realistic target. 24% (no change) say that this is too modest, while 23% (no change) believe it is too ambitious.

- Finally, 47% (-1) think that the target "at least 40% of the people aged 30 to 34 years should have a higher education degree or diploma" is realistic, whilst 38% (+1) say it is too ambitious and 9% (no change) too modest. Of the eight targets, this is by far the most likely to be considered too ambitious (significantly ahead of the target of reducing the number of Europeans living below the poverty line by a quarter by 2020, which 23% of respondents say is too ambitious).

[5] 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 results shows that this indicator has tended to decline slightly since the question was first posed in spring 2010. Over the three years, the "realistic" perception is unchanged for one target, and has fallen by one percentage point for three of them and by two points for one other. The decline is a little more marked for the last three targets, with a four-point fall for two of them and a five-point drop for the last.

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	EB79 Sp.2013	Diff. Sp.2013 - Aut.2012	Diff. Sp.2013 - 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	59%	=	-4
To increase the energy efficiency in the EU by 20% by 2020	60%	59%	-1	60%	+1	60%	=	=	60%	=	=	59%	-1	-1	59%	=	-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	57%	=	-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	56%	-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%	=	=	54%	-1	-1
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	51%	=	-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	49%	=	-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	47%	-1	-5

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

An analysis of the national results shows that public opinion is most sceptical as to the feasibility of these targets in Greece, Cyprus and Luxembourg. In each case, the percentage of respondents who find them credible is markedly below the European average in these three countries. In contrast, respondents in Italy and Lithuania are significantly more likely than the European average to regard all these targets as realistic.

The detailed national analysis shows that the target of ensuring that **three-quarters of men and women aged between 20 and 64 years have a job** is seen as credible by an absolute majority of respondents in 22 EU countries – led by Italy (71%) – and by a relative majority in Slovakia (48%), Sweden (45%), the Czech Republic (44%) and Greece (41%). Cyprus stands out as the only country where the answer "about right" came only in second place (30%, -3), behind "too ambitious" (39%, +2). The perception that this target is realistic has declined sharply in Malta (53%, -11 percentage points since autumn 2012).

Increasing the energy efficiency in the European Union by 20% by 2020 is regarded as realistic by absolute majorities of respondents in every Member State, most strikingly in Lithuania (69%), Italy (68%) and Finland (68%). Following increases of 4 and 7 percentage points respectively, this target is now seen as credible by absolute majorities in Cyprus and Greece, where it only commanded a relative majority in EB78 in autumn 2012.

The target of **increasing the share of renewable energy in the European Union by 20% by 2020** is seen as credible by an absolute majority of respondents in 21 EU countries, led by Slovenia (68%) and Lithuania (68%), and by a large relative majority in the remaining six – Bulgaria (49%), the Netherlands (49%), Sweden (49%), Austria (48%), Cyprus (48%) and Luxembourg (46%). This credibility has gained eight percentage points in Greece but has declined by seven points in Ireland and Malta. On this indicator, respondents in Sweden (38%, +4) and Austria (36%, +1) record rates of "too modest" responses which are significantly higher than the European average.

A majority of respondents in 23 Member States – led by Finland (69%) – agree as to the realistic nature of the target of **investing 3% of the wealth produced in the EU to research and development.** There are relative majorities for this position in Greece (48%), France (47%), Cyprus (46%) and Luxembourg (46%). The 6-point decline recorded in Poland is the only notable evolution since autumn 2012.

Reducing greenhouse gas emissions by 20% compared to their 1990 level is seen as "about right" by an absolute majority of respondents in 18 EU countries, most strikingly in Italy (65%). This is the leading response, mentioned by a relative majority of respondents, in the remaining nine Member States; this view is widespread in Denmark (49%), Germany (49%), France (49%), Greece (47%), Austria (47%), Belgium (46%) and Cyprus (46%), and present to a much lesser extent in Sweden (43% for 41% who say this target is "too modest") and Luxembourg (36% for 32% who say it is "too ambitious"). The credibility of this target has gained seven percentage points in Greece but has lost seven in Luxembourg. As in the case of the target for increasing the share of renewable energy in the EU, respondents in Sweden (41%, +3) and Austria (35%, +2) again stand out by recording rates of "too modest" responses which are significantly higher than the European average (18%) for this environmental target.

In Sweden, respondents continue to stand out in their assessment of the target for **reducing the number of young people leaving school with no qualifications to 10%**. This is the only Member State where the majority regard this target as "too modest" (52%). The target appears realistic to an absolute majority of respondents in 17 EU countries, led by Slovenia (65%). The gap between those who say the target is "about right" and those who think it is "too modest" is narrow in Austria (45% vs. 40%), Germany (42% vs. 38%) and Luxembourg (35% vs. 32%, where 31% say the target is "too ambitious"). The credibility of this target has seen a sharp eight-point decline in Luxembourg.

The target of **reducing poverty in the European Union by a quarter** is thought to be "too ambitious" by a relative majority of respondents in Cyprus (47%, compared with 24% who say it is "about right") and Luxembourg (36% vs. 34%). Conversely, it is seen as "too modest" by relative majorities in Sweden (46% vs. 39% who say "about right"), Austria (43% vs. 42%) and Greece (36% vs. 32%). It appears realistic to a majority of respondents in all the remaining Member States, with relative majorities in ten countries and absolute majorities in 12. The highest rates of "realistic" responses are recorded in Italy (63%), Lithuania (60%) and Latvia (60%).

Finally, as in the preceding Eurobarometer surveys, the target **"at least 40% of the people aged 30-34 years should have a higher education degree or diploma"** clearly gives rise to the widest national variations. In eight countries, this target is seen as "too ambitious" either by an absolute majority of respondents (the Netherlands, 69%; Germany, 63%; Finland, 54%), or by a relative majority (Estonia, 48% compared with 40% who say it is "about right"; France (47% vs. 36%); Luxembourg (47% vs. 38%); Austria (46% vs. 41%) and Hungary (46% vs. 44%)). In Hungary, there has been a 6-point increase since autumn 2012 in the number of respondents who think that this target is "too ambitious".

Opinions are evenly divided in Slovakia (45% vs. 45%) while respondents are likely to say that the target is realistic in all the other countries, with an absolute majority in eight of them, led by Italy (64%) and Spain (61%).

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	To increase the share of renewable energy 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 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%	56%	54%	51%	49%	47%
BE	54%	**58%**	53%	54%	46%	43%	*40%*	45%
BG	**62%**	54%	49%	50%	51%	50%	49%	*46%*
CZ	44%	56%	52%	**60%**	50%	49%	*38%*	46%
DK	61%	**65%**	58%	**65%**	*49%*	53%	51%	53%
DE	**60%**	55%	54%	58%	49%	42%	45%	*30%*
EE	63%	**64%**	61%	57%	57%	50%	46%	*40%*
IE	58%	**60%**	55%	57%	*51%*	55%	52%	54%
EL	41%	**53%**	52%	48%	47%	42%	*32%*	47%
ES	57%	**65%**	64%	58%	63%	59%	*56%*	61%
FR	54%	**57%**	55%	47%	49%	43%	40%	*36%*
IT	**71%**	68%	66%	66%	65%	*63%*	*63%*	64%
CY	30%	**50%**	48%	46%	46%	44%	*24%*	49%
LV	60%	**65%**	63%	60%	60%	52%	60%	*49%*
LT	62%	**69%**	68%	63%	61%	*54%*	60%	58%
LU	**54%**	52%	46%	46%	36%	35%	*34%*	38%
HU	53%	**60%**	52%	54%	51%	51%	*40%*	44%
MT	53%	**63%**	56%	55%	56%	56%	46%	*45%*
AT	**55%**	53%	48%	54%	47%	45%	42%	*41%*
NL	**55%**	54%	49%	52%	50%	49%	41%	*24%*
PL	60%	**64%**	60%	58%	60%	60%	*55%*	56%
PT	56%	**58%**	**58%**	56%	56%	52%	50%	*49%*
RO	**64%**	55%	54%	54%	53%	54%	52%	*51%*
SI	62%	67%	**68%**	64%	59%	65%	55%	*47%*
SK	48%	55%	53%	**56%**	53%	53%	*43%*	45%
FI	63%	68%	61%	**69%**	56%	55%	50%	*41%*
SE	45%	55%	49%	**58%**	43%	*37%*	39%	**58%**
UK	**62%**	56%	52%	51%	51%	*47%*	53%	*47%*
HR	64%	68%	66%	65%	64%	67%	61%	57%

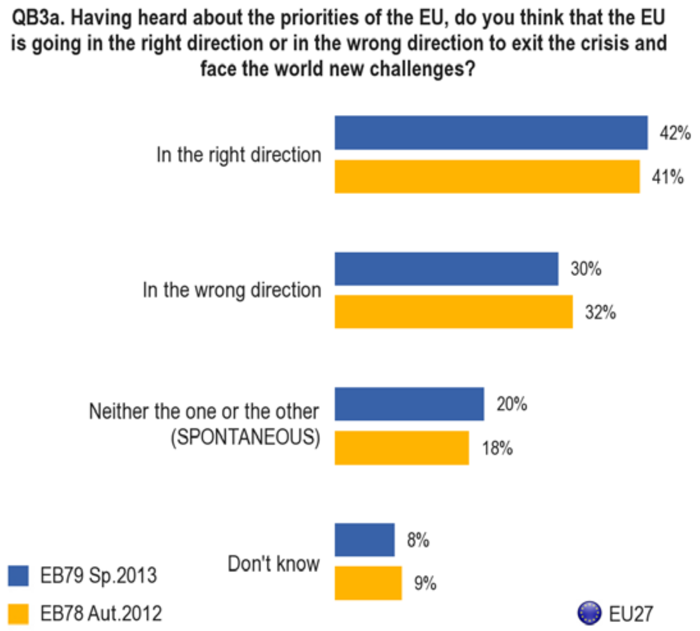
Highest percentage per country *Lowest percentage per country*

Highest percentage per item Lowest percentage per item

III. THE DIRECTION TAKEN BY THE EUROPEAN UNION TO TACKLE THE CRISIS

- The impression that the European Union is going in the right direction to emerge from the crisis has gained a little ground -

More than four in ten Europeans (42%, +1 percentage point since autumn 2012) believe that the EU is going in the right direction to emerge from the crisis and face the new world challenges, while 30% (-2 percentage points) say the opposite. One in five Europeans (20%, +2) spontaneously reply that the European Union is going in neither the right direction nor the wrong direction and 8% (-1) express no opinion[6].



Though the evolution is small, the slight rise in “right direction” answers, coupled with the fall in “wrong direction” responses, nevertheless suggests a slight improvement in public opinion: the positive-negative ratio now stands at +12, a 3-point rise since autumn and spring 2012. Though it has improved over the year, this ratio remains far below its highest level of +23, measured in autumn 2010 (EB74).

Respondents are more likely to approve of the direction taken by the EU to emerge from the crisis in NMS12 countries (52% vs. 21%) and outside the euro area (50% vs. 26%) than in EU15 countries (39% vs. 33%) and the euro area countries (37% vs. 32%). The trend is towards a slight improvement in all four groups of countries. Since autumn 2012, the ratio between approval and disapproval has risen from +29 to +31 in the NMS12, from +20 to +24 in non-euro area countries, from +3 to +6 in the EU15 and from +4 to +5 in the countries belonging to the euro area.

Following a sharp rise in positive opinions (+11), this survey has seen a striking reversal of the opinion ratio in Belgium (49% for “the right direction” vs. 30%, compared with 38% vs. 43% in autumn 2012). This marks a return to the country’s position in spring 2012 (EB77), when the ratio was 44% vs. 32%, and Belgium is now once again among the 22 Member States where majorities approve of the EU’s policy for emerging from the crisis.

This approval commands an absolute majority in 10 Member States: Lithuania (66%), Sweden (66%), Denmark (63%), Finland (62%), Bulgaria (61%), Malta (60%), Poland (57%), the Netherlands (54%), Latvia (52%) and Estonia (50%).

There is a relative majority in 12 other countries: Belgium (49% vs. 30%), as we have seen; the Czech Republic (49% vs. 29%), Germany (49% vs. 18%), Luxembourg (49% vs. 33%), Ireland (47% vs. 26%), Romania (46% vs. 15%), Hungary (45% vs. 25%), Slovakia (44% vs. 34%), the United Kingdom (43% vs. 38%), Austria (41% vs. 23%), Slovenia (41% vs. 29%) and France, where the majority is very narrow (39% vs. 36%).

Within this group – with the striking exception of France, where positive judgments have fallen sharply (-7) contributing to the narrowing of the opinion ratio – the trend is towards an appreciable rise in approval. The impression that the European Union is going in the right direction has gained 11 percentage points in Belgium, ten in Malta, eight in Luxembourg and Hungary, six in Denmark and five in Finland.

The view that the EU is going in the wrong direction to emerge from the crisis is dominant in five countries, all in the south of Europe: Greece (56%), Spain (49% vs. 23%), Portugal (43% vs. 23%), Cyprus (39% vs. 25%) and Italy (34% vs. 23%). Nevertheless, negative judgments have lost ground in most of these countries (-7 in Portugal, -5 in Greece, -4 in Spain, -3 in Italy), except Cyprus where they have strengthened (+6).

Overall, against a background of general improvement in opinions of the EU's crisis policy (the ratio between approval and disapproval is stable or has improved in 21 countries and has fallen very slightly in Germany, the Netherlands and Poland), three countries stand out as significant exceptions, with a striking deterioration of their opinion ratios. These countries are Cyprus, where the ratio between approval and disapproval has worsened by 13 percentage points, France, where it has lost 10 points and Slovenia, which has seen a 5-point fall.

[6] QB3a. 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?

QB3a 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. Sp. 2013 - Aut. 2012

	In the right direction		In the wrong direction		Neither the one or the other (SPONTANEOUS)		Don't know	
EU27	42%	+1	30%	-2	20%	+2	8%	-1
LT	66%	+3	10%	-1	12%	=	12%	-2
SE	66%	+2	20%	-1	8%	+1	6%	-2
DK	63%	+6	24%	-3	6%	-3	7%	=
FI	62%	+5	21%	-2	10%	-4	7%	+1
BG	61%	-1	7%	-1	22%	+1	10%	+1
MT	60%	+10	6%	-12	20%	+1	14%	+1
PL	57%	-3	22%	-1	14%	+2	7%	+2
NL	54%	+1	30%	+3	7%	=	9%	-4
LV	52%	+3	12%	-1	26%	+1	10%	-3
EE	50%	+3	13%	-2	28%	=	9%	-1
BE	49%	+11	30%	-13	19%	+2	2%	=
CZ	49%	+5	29%	-2	17%	=	5%	-3
DE	49%	-1	18%	+2	27%	=	6%	-1
LU	49%	+8	33%	-1	14%	-3	4%	-4
IE	47%	+1	26%	+1	18%	+1	9%	-3
RO	46%	-1	15%	-4	23%	+2	16%	+3
HU	45%	+8	25%	-8	19%	-1	11%	+1
SK	44%	+3	34%	-1	17%	-2	5%	=
UK	43%	+2	38%	-3	9%	+1	10%	=
AT	41%	+2	23%	-1	33%	-1	3%	=
SI	41%	-2	29%	+3	23%	-1	7%	=
FR	39%	-7	36%	+3	15%	+4	10%	=
CY	25%	-7	39%	+6	26%	+4	10%	-3
ES	23%	-1	49%	-4	19%	+5	9%	=
IT	23%	+2	34%	-3	33%	+3	10%	-2
PT	23%	+2	43%	-7	27%	+5	7%	=
EL	22%	+5	56%	-5	21%	+1	1%	-1
HR	55%	-	17%	-	23%	-	5%	-

Like most opinions about the European Union and its policies, views of the EU's policy for emerging from the crisis are heavily influenced by the age, education and socio-economic circumstances of respondents.

Approval of the EU's policy declines linearly with age, from 49% in the 15-24 age group to 38% among people aged 55 or more.

Majorities approve of the policy among the most educated respondents (51% among those who studied for longest), managers (56%) and the comfortably-off (48% among people who say they almost never have difficulties paying their bills).

Conversely, it is the minority position among the least educated respondents (28%, compared with 37% disapproval among people who left school before the age of 16), the unemployed (33% vs. 39%) and those in financially insecure circumstances (27% vs. 43% among people who say they have difficulties paying their bills most of the time).

Finally, the feeling of being “heard” by the European Union has a distinct influence on this question. Almost two-thirds of respondents who believe that their voice counts in the European Union say that the EU is going in the right direction to emerge from the crisis and face the new world challenges (63%, compared with 18% who think it is going in the wrong direction), while this ratio is reversed among those who think their voice is not heard by the EU (33% vs. 37%).

QB3a. 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	42%	30%	20%	8%
Gender				
Men	43%	32%	19%	6%
Women	40%	29%	21%	10%
Age				
15-24	49%	27%	16%	8%
25-39	45%	29%	19%	7%
40-54	39%	33%	20%	8%
55 +	38%	31%	21%	10%
Education (End of)				
15-	28%	37%	23%	12%
16-19	39%	32%	21%	8%
20+	51%	26%	17%	6%
Still studying	54%	24%	15%	7%
Socio-professional category				
Self-employed	42%	31%	20%	7%
Managers	56%	23%	16%	5%
Other white collars	42%	29%	23%	6%
Manual workers	40%	33%	19%	8%
House persons	33%	33%	22%	12%
Unemployed	33%	39%	19%	9%
Retired	38%	31%	21%	10%
Students	54%	24%	15%	7%
Difficulties paying bills				
Most of the time	27%	43%	19%	11%
From time to time	35%	33%	24%	8%
Almost never	48%	26%	18%	8%
My voice counts in the EU				
Agree	63%	18%	14%	5%
Disagree	33%	37%	22%	8%

TECHNICAL SPECIFICATIONS

Between the 10th and 26th of May 2013 TNS Opinion & Social, a consortium created between TNS plc and TNS opinion, carried out the wave 79.3 of the EUROBAROMETER survey, on request of the EUROPEAN COMMISSION, Directorate-General for Communication, “Research and Speechwriting”.

The wave 79.3 is the STANDARD EUROBAROMETER 79 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 79 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 below.

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% 95%	10% 90%	15% 85%	20% 80%	25% 75%	30% 70%	35% 65%	40% 60%	45% 55%	50% 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% 95%	10% 90%	15% 85%	20% 80%	25% 75%	30% 70%	35% 65%	40% 60%	45% 55%	50% 50%	

ABBR.	COUNTRIES	INSTITUTES	N° INTERVIEWS	DATES FIELDWORK		POPULATION 15+
BE	Belgium	TNS Dimarso	1.013	11/05/13	26/05/13	8.939.546
BG	Bulgaria	TNS BBSS	1.029	13/05/13	20/05/13	6.537.510
CZ	Czech Rep.	TNS Aisa	1.001	11/05/13	24/05/13	9.012.443
DK	Denmark	TNS Gallup DK	1.005	10/05/13	26/05/13	4.561.264
DE	Germany	TNS Infratest	1.554	10/05/13	26/05/13	64.336.389
EE	Estonia	Emor	1.002	10/05/13	26/05/13	945.733
IE	Ireland	IMS Millward Brown	1.002	11/05/13	26/05/13	3.522.000
EL	Greece	TNS ICAP	1.000	11/05/13	25/05/13	8.693.566
ES	Spain	TNS Demoscopia	1.011	13/05/13	26/05/13	39.127.930
FR	France	TNS Sofres	1.019	11/05/13	25/05/13	47.756.439
IT	Italy	TNS Italia	1.011	11/05/13	24/05/13	51.862.391
CY	Rep. Of Cyprus	Synovate	505	10/05/13	25/05/13	660.400
LV	Latvia	TNS Latvia	1.002	10/05/13	26/05/13	1.447.866
LT	Lithuania	TNS LT	1.029	10/05/13	26/05/13	2.829.740
LU	Luxembourg	TNS ILReS	505	10/05/13	26/05/13	434.878
HU	Hungary	TNS Hoffmann Kft	1.027	11/05/13	25/05/13	8.320.614
MT	Malta	MISCO	500	10/05/13	26/05/13	335.476
NL	Netherlands	TNS NIPO	1.021	11/05/13	26/05/13	13.371.980
AT	Austria	Österreichisches Gallup-Institut	999	10/05/13	26/05/13	7.009.827
PL	Poland	TNS OBOP	1.000	11/05/13	26/05/13	32.413.735
PT	Portugal	TNS EUROTESTE	1.004	11/05/13	26/05/13	8.080.915
RO	Romania	TNS CSOP	1.083	11/05/13	21/05/13	18.246.731
SI	Slovanie	RM PLUS	1.011	11/05/13	26/05/13	1.759.701
SK	Slovakia	TNS Slovakia	1.000	10/05/13	24/05/13	4.549.955
FI	Finland	TNS Gallup Oy	956	10/05/13	26/05/13	4.440.004
SE	Sweden	TNS GALLUP	1.011	11/05/13	26/05/13	7.791.240
UK	United Kingdom	TNS UK	1.305	11/05/13	26/05/13	51.848.010
TOTAL EU27			**26.605**	**10/05/13**	**26/05/13**	**408.836.283**
CY(tcc)	Turkish Cypriot Comm.	Kadem	500	11/05/13	23/05/13	143.226
HR	Croatia	Puls	1.000	14/05/13	26/05/13	3.749.400
TR	Turkey	TNS PIAR	1.001	11/05/13	24/05/13	54.844.406
MK	Former Yugoslav Rep. Of Macedonia	TNS Brima	1.056	11/05/13	20/05/13	1.678.404
IS	Iceland	Capacent	511	11/05/13	26/05/13	252.277
ME	Montenegro	TNS Medium Gallup	1.015	11/05/13	24/05/13	492.265
RS	Serbia	TNS Medium Gallup	1.006	11/05/13	25/05/13	6.409.693
TOTAL			**32.694**	**10/05/13**	**26/05/13**	**476.405.954**