



A Eurobarometer Almanac **Spotlight on European public opinion in 2013**



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Foreword



Foreword

In 2013 Eurobarometer started its fifth decade. Over the last forty years eighty Standard Eurobarometer (EB) surveys and over a thousand 1000 quantitative and qualitative surveys were carried out, in the deluge of numbers and reports it is important to stop for a moment, think and look back at the year that went by.

Eurobarometer is widely regarded as a reference point for European public opinion. It is a crucial instrument for all of us to see how public opinion is changing, allowing us to understand how the European project and its developments impact on the life of Europeans and providing information to feed into policy-making for the European Union (EU) and its institutions.

Eurobarometer contains the opinions of millions of Europeans on a wide range of questions. It not only shows trends of public attitude towards EU in general and core EU policies, but it helps us to see also beyond the EU and, for example, that companies in the USA say they are greener in many respects than in Europe. It allows us to see how EU citizens' attitude change towards EU membership over time, but it also sheds light on the fact that the Swedes are more into opera than the Italians. From the very beginning of Eurobarometer, back in the 1970's, the aim was to help Europeans see and understand each other. We track attitudes towards the unification of Europe and whether such a thing as 'European public opinion' exists. Today we pay a particular attention to trends, national specificities, and socio-demographic variables.

The aim of this Almanac is to look back at the year 2013 and provide a snapshot of how we saw the past year through the data. This annual document strives to preserve a trace of our thinking for the future.

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

Eurobarometer's four types of surveys

Standard Eurobarometer surveys – the reference on European public opinion, with face-to-face surveys at respondents' homes done twice a year (Spring/Autumn) by DG COMM since 1974.

Special Eurobarometer surveys – the primary tool for capturing the opinion of the general public on specific issues, with face-to-face surveys at respondents' homes.

Flash Eurobarometer surveys – telephone surveys for the polling of specific target groups or the general public with short questionnaires.

Eurobarometer Studies – focus groups or in-depth interviews, allowing for a detailed understanding of public opinion on a specific subject.

1.

Rule of law

– What is the score ?



1. Rule of law – What is the score?

Rule of law is the foundation of the values upon which the European Union is based. Compliance with the rule of law is a prerequisite for the protection of all fundamental values listed in the Treaty of the European Union. It is also a prerequisite for upholding all rights and obligations deriving from the Treaties and from international law. Since 2009, the European Commission has been confronted on several occasions with crisis events in some Member States, which revealed specific rule of law problems. Reacting to the developments, the College of Commissioners had two orientation debates on how to better safeguard the rule of law in the European Union. As a result of these debates, the Commission has adopted a new rule of law framework that aims at establishing an early warning tool allowing the Commission to enter into a dialogue with the Member State concerned to prevent the escalation of systemic threats to the rule of law. This new framework does not constitute or claim new competencies for the Commission, but makes transparent how the Commission exercises its role under the Treaties.

In line with the Commission's decision-making efforts, in 2013 Eurobarometer looked at public attitudes towards several components of the rule of law in EU Member States from the perceptions on the **functioning of the justice system to corruption** in the public domain and the business sector.

An effective functioning of the EU requires effective justice systems in all Member States. Quality, independence and efficiency are the key components of this. According to a Flash Eurobarometer on Justice in the EU¹, **a majority of people at EU level (53%) trust their national justice system**, but at the same time, in half of the Member States a majority of respondents say they do not have confidence in the justice system. The perceptions are very country-specific. For example, 84% of people in Luxembourg agree that the law is applied and enforced effectively, compared to only 18% in Slovenia.

Overall, most of people agree that the State acts in accordance with the law (56%), on the other hand a majority of respondents (58%) do not agree that the law is applied and enforced effectively, equally and without discrimination or that the State fights corruption effectively.

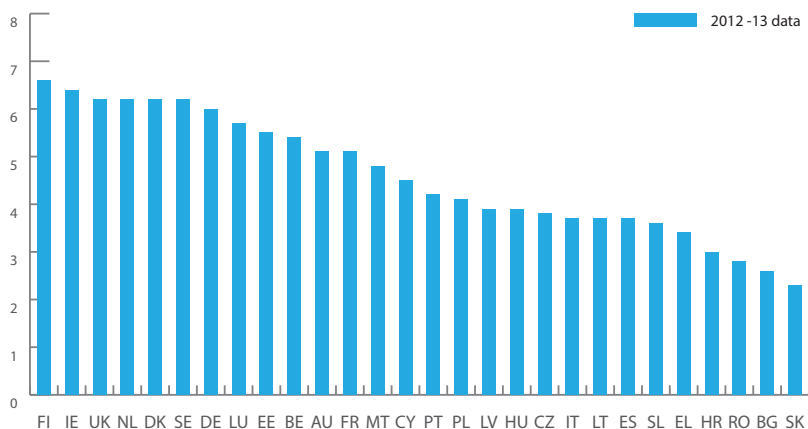
There is strong support for an EU role in cross-border cases or to ensure that EU law is upheld effectively throughout the EU (71% of the respondents strongly agree or tend to agree) or in cases where there are serious problems in the functioning of a national judicial system (66%).

¹ Flash Eurobarometer 385: *Justice in the EU*

It is interesting to compare the results of the Flash Eurobarometer survey on justice in the EU with the data of the 2014 EU Justice Scoreboard on the perceived judicial independence in EU Member States². Judicial independence is important for an attractive business environment. It assures the predictability, certainty, fairness and stability of the legal system in which businesses operate.

Perception of the independence of national justice systems varies widely in the EU. Even though several Member States are among the top 10 in the world in terms of the perception of judicial independence, there is a rather low level of perception of judicial independence by business end-users of the justice system in certain Member States. In comparison to previous years in several Member States the perception of independence has improved whilst in some Member States it has deteriorated. (In the graph below, the higher value means better perception).

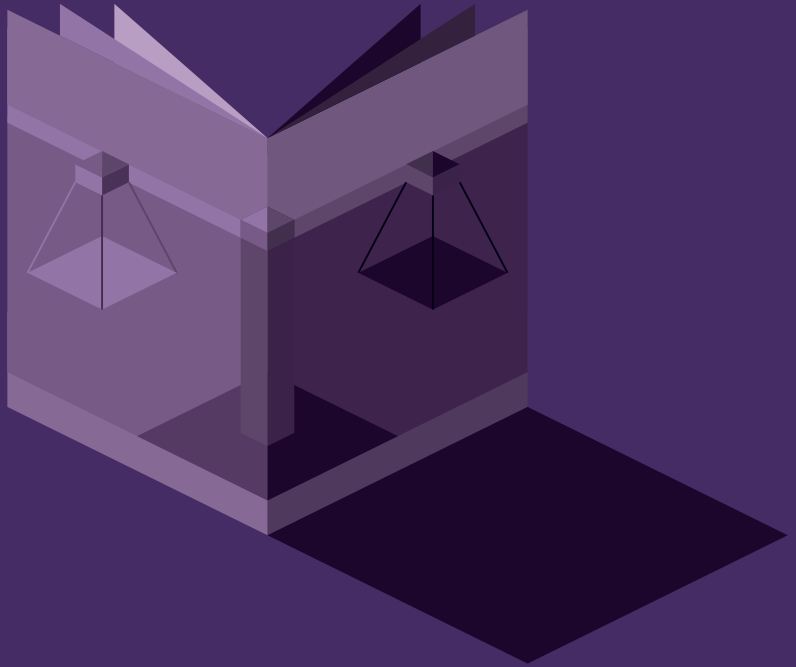
↘ Independence of judges in EU Member States



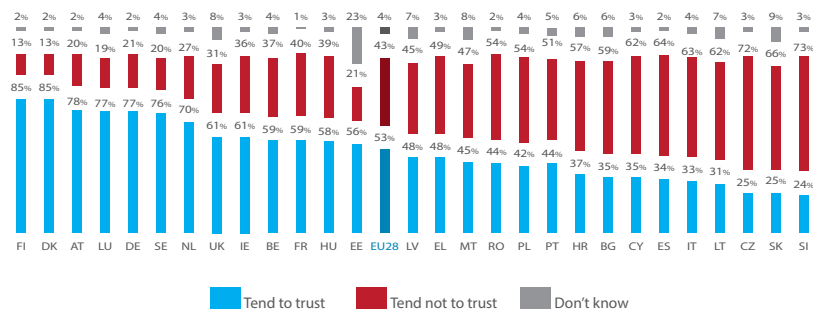
Similarly to the independence of judges, Eurobarometer's data on trust in the national justice systems show a substantial difference among Member States as well. In 13 countries over 50% of respondents say that they tend to trust their national justice system, with people in Finland and Denmark (both 85%) demonstrating the highest levels of trust. But in three Member States, fewer than three out of ten people say that they tend to trust their national justice system: Slovenia (24%), Slovakia (25%) and the Czech Republic (25%).

² Source: World Economic Forum. The WEF indicator is based on survey answers to the question: «To what extent is the judiciary in your country independent from the influences of members of government, citizens, or firms?» The survey was replied to by a representative sample of firms in all countries representing the main sectors of the economy (agriculture, manufacturing industry, non-manufacturing industry, and services).

84% of people in Luxembourg agree that the law is applied and enforced effectively, compared to only 18% in Slovenia.



Trust in the justice system in EU Member States



Comparing the results with the independence of the judges³ in the Member States, it can be seen that although the order of the countries is different in the two tables, there are certain similarities. Countries with a higher than 60% trust index are all ranked among the top third of countries having a relatively higher level of independence of judges. Conversely, Member States where fewer than 40% of people trust the judicial system scored relatively low on the scale of independence of judges. There are few exceptions to this, such as Austria, where the trust in the national justice system is the third highest in the EU, whereas looking at the independence of judges, the country is not among the highest in the ranking. On the contrary, while the independence of judges is among the lowest in Romania and Greece, the trust in the justice system is above 40% in both cases.

Corruption, whether it takes the form of political corruption, corrupt activities committed by and with organised criminal groups, private-to-private corruption or so-called petty corruption, continues to be one of the major challenges facing Europe. While the nature and scope of corruption varies from one EU Member State to another, it harms the EU as a whole by reducing levels of investment, obstructing the fair operation of the Internal Market and having a negative impact on public finances. **The economic costs incurred by corruption in the EU are estimated to amount to around EUR 120 billion annually⁴.**

Corruption can also undermine trust in democratic institutions and weaken the accountability of political leadership. Moreover, it enables organised crime groups to use corruption to commit other serious crimes, such as trafficking in drugs and human beings.

The EU is strongly committed to fighting corruption. The 2003 Framework Decision on combating corruption in the private sector aims to criminalise both active

³ Source: World Economic Forum

⁴ Source: Special Eurobarometer 397: *Corruption*

Around one in six Europeans think it is acceptable to give money in return for something from the public administration or public services.

and passive bribery in all Member States. With the adoption of the Stockholm Programme, the Commission has been given a mandate to measure efforts in the fight against corruption and to develop a comprehensive EU anti-corruption policy.

A Special Eurobarometer⁵ survey conducted in February and March 2013 revealed that **more than half of Europeans (56%) think the level of corruption in their country has increased over the past three years**. Three-quarters of respondents (76%) think that corruption is widespread in their own country, but only a quarter of Europeans (26%) agree they are personally affected by corruption in their daily lives. Around one in twelve Europeans (8%) say they have experienced or witnessed a case of corruption in the past 12 months.

Europeans are rather pessimistic about the level of corruption in public institutions, and they are less optimistic about the capacity of public institutions to counteract corruption. Just under a quarter of Europeans (23%) agree that their government's efforts are effective in tackling corruption; around a quarter (26%) that there are enough successful prosecutions in their country to deter people from corrupt practices; and just over a quarter (27%) that EU institutions help in reducing corruption. A third of respondents (33%) agree that measures taken in their country to combat corruption are applied impartially and without ulterior motives. Almost three quarters (73%) that high-level corruption cases are not pursued sufficiently in their country..

Although Europeans' perceptions about the level of corruption are rather negative, **actual experience of corruption is not so widespread in Europe**. Around one in eight Europeans (12%) say that they personally know someone who takes or has taken bribes. A small minority of Europeans (4%) say they have been asked or expected to pay a bribe for services received, with respondents most likely to report that this happened in dealings with the healthcare system (2%). One in twenty Europeans who have visited public health practitioners and institutions (5%) say that they gave an additional payment, valuable gift or make a hospital donation.

⁵ Source: Special Eurobarometer 397: *Corruption*

2.

Economic recovery: Light at the end of the tunnel?



2. Economic recovery: Light at the end of the tunnel?

Economic optimism is on the rise, but are we there yet?

Five years from the start of the financial crisis, Europeans' view on the economic situation is starting to show real improvement. 2013 was a year of positive evolutions in the perceptions of the economic situation in Europe, at least on the national and to a greater extent, the European level. Although more than two-thirds of Europeans perceive the situation of their national economy as bad now for the eleventh time in a row, the number of Europeans judging that their country's economic situation is good means that this proportion now exceeds 30% for the first time since autumn 2007.

In 20 Member States, the proportion of respondents who consider that the economic situation of their country is good has increased from Spring to Autumn 2013: the largest evolutions are seen in Denmark (74%, +16 since spring 2013), the UK (38%, +14), Poland (35%, +13) and Ireland (18%, +11).

Europeans' short-term outlook for the economy at national and European level has improved. A majority of respondents continue to consider that the situation will remain "the same" in the coming year, with few evolutions. However, we observe a combination of more "better" and fewer "worse" answers, therefore, the optimism index⁶ for the next twelve months has increased from spring to autumn 2013 (from -16 to -9 for the situation of the national economy and from -14 to -6 for the situation of the European economy). Overall, optimism about the situation of the national economy over the next twelve months has grown in 20 countries, most strikingly in the Netherlands (42%, +19 for the answer "better" since spring 2013), Denmark (44%, +8) and Ireland (28%, +8).

As far as jobs are concerned, Europeans are also less pessimistic about the impact of the crisis on the job market. Half of them continue to think that "the worst is still to come", but this proportion has decreased since spring 2013 (50%, -5 percentage points). The belief that "the impact of the crisis on the job market has already reached its peak" has grown in 20 Member States, with the strongest increases in Ireland (56%, +16 since spring 2013), the Netherlands (60%, +14), and Poland (48%, +12). Conversely, the feeling that "the worst is still to come" is slightly more widespread in eight countries.

⁶ Source: Special Eurobarometer 397: Corruption

And what about the Euro?

A Flash Eurobarometer⁷ survey conducted in Autumn 2013 in the 17 Euro area⁸ countries revealed that while **more than half (57%) of those living in the euro area regard the euro as a good thing for their country**, an even higher proportion of respondents say that the euro is a good thing for the EU (68%). Around a quarter (24%) of Europeans agree that having the euro makes them feel more European.

Looking across the EU, nearly three quarters (72%) of respondents think that there should be more coordination of economic policy, including budgetary policies, amongst euro area governments. This view is held by the majority of respondents in all countries although to a lesser extent in Estonia (43%). 79% of respondents think that there is a need for significant reforms to improve economic performance, and 76% think that governments need to save more today to prepare public finances for ageing populations.

72% say economic reforms would be more effective if carried out in a coordinated way at EU level. Most people in the Euro area (50%) think that successful reforms in other euro area countries have facilitated reforms in their country.

The two opposite ends of the scale

While support for the Euro is stable within the Euro area and support for macro-economic coordination is widespread in the Euro area countries, some countries show different tendencies. Two particular examples are **Ireland** and **Cyprus**. In Ireland financial assistance started in 2010 and the Commission, with its decision in December 2013, gave a green light to the final loan disbursement. This gave a positive sign in terms of economic recovery for the country. On the other hand, 2013 was a very different year for Cyprus, where in March following the decision of the Eurogroup, bank deposits were subjected to a one off levy.

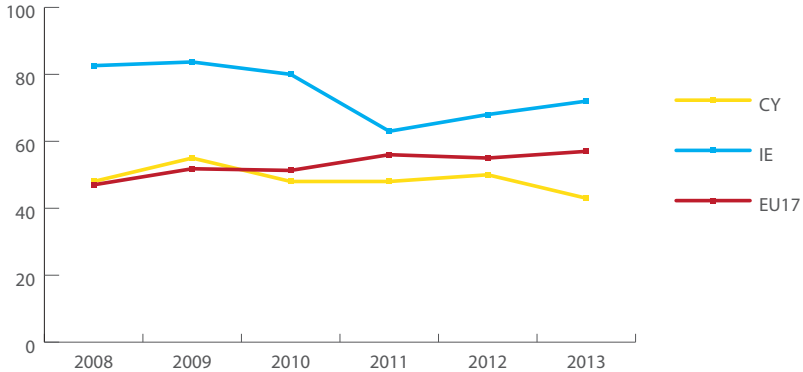
Public opinion on the support for the Euro clearly shows the sentiments of both the Irish and the Cypriot. In Ireland public support for the Euro was above the average of the Euro area before the crisis, it dropped significantly in 2011. Since then support has recovered steadily and stands at 72 %, which is **the highest among the Euro area countries**.

Contrary to this, in Cyprus, public support for the Euro has showed a noticeable drop in 2013 (seven percentage points). **In 2013, among all Euro area countries, Cyprus is where public support for the Euro is the lowest.**

⁷ Flash Eurobarometer 386: *The Euro Area*

⁸ Latvia joined the Euro area on 1 January, 2014.

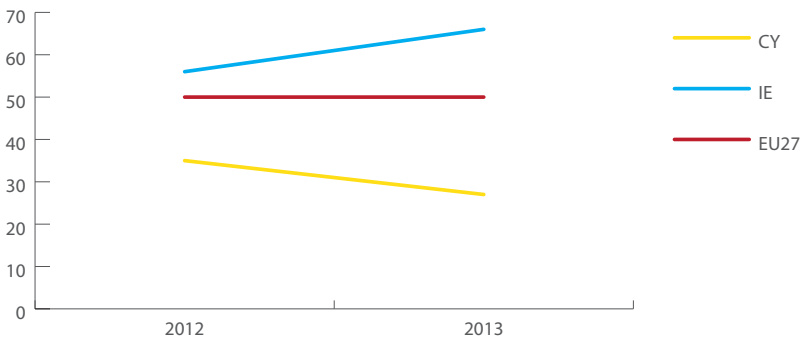
Support for the Euro in Cyprus and Ireland



9 ↓

Although macroeconomic reforms and policy coordination on an EU level is supported by Europeans in general, in Ireland and in Cyprus, there were contrasting shifts in opinion about EU membership. In the case of Ireland, the proportion of positive answers to the question whether membership is a good thing or a bad thing has grown (56% good thing in 2012 and 66% good thing in 2013). In Cyprus, the developments are exactly the opposite. In 2012, 35% thought that EU membership was a good thing, in 2013 27% of respondents felt the same way.

Support for EU-membership in Cyprus and Ireland



10 ↓

⁹ Source: Flash Eurobarometer 386: *The Euro Area*

¹⁰ Source: *European Parliament One year to go before the 2014 European elections*
http://www.europarl.europa.eu/pdf/eurobarometre/2013/election/synth_finale_en.pdf

Other analysis showed the economic situation may have little influence on people's attitudes to the EU and/or trust in its institutions. A return to economic growth and individual prosperity will not necessarily have a positive effect on people's attitudes.

3.

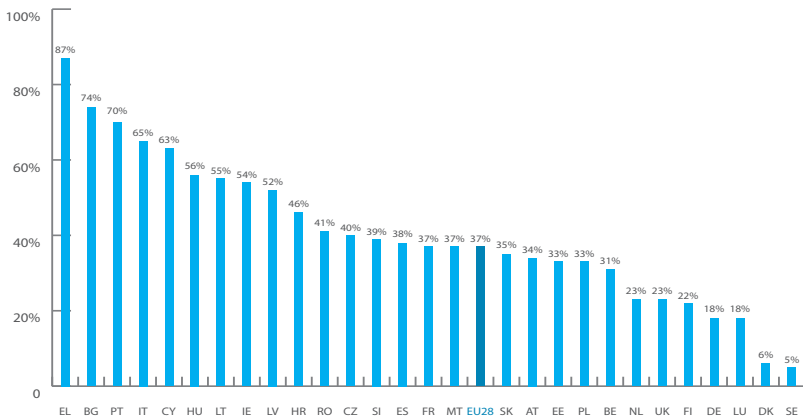
The Social Dimension



3. The Social Dimension

While survey results in the field of economy and finance suggest that the worst of the financial crisis might be behind us, other measures are not so reassuring. According to Eurobarometer data of January 2014¹¹, more than one in ten (11%) of Europeans regularly experienced difficulties paying their bills at the end of the month in the course of 2013. More than one quarter (26%) faced this problem from time to time. Although the proportion of those who have regular difficulties remained stable since 2009, there are large differences among Member States.

↘ Difficulties in paying bills at the end of the month

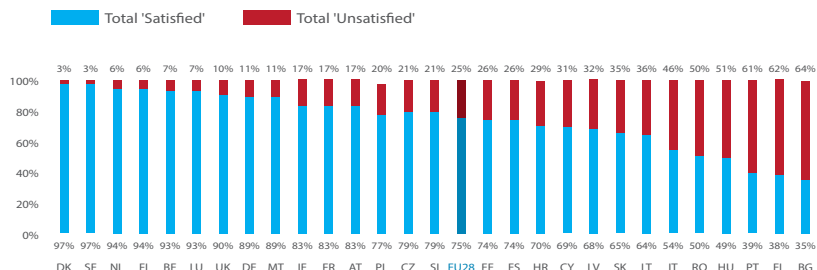


In Sweden and Denmark only 5 and 6 % have difficulties paying their bills, in Greece 87% of the people face this challenge. In nine Member States, most people experience difficulties paying their bills. There are other interesting evolutions. In autumn 2012, 23% of people in Ireland said they regularly had difficulties paying their bills, by the end of 2013 this number dropped by 10 percentage points. A positive shift in the country's economic indicators seems to reflect rapidly in perceptions of how the economy is doing, support for the Euro and this measure of 'precarity' (difficulty to pay bills).

More broadly, it is interesting to compare the above data with that of the perceived life satisfaction of Europeans. According to Eurobarometer data, the most satisfied people in the EU are in Denmark and Sweden (97% of the people are satisfied in both countries). These are exactly the two countries where people experience the least difficulty to pay their bills (in Sweden 5% and in Denmark 6%). Looking at the bottom of the scale of life satisfaction, the least satisfied countries are Bulgaria (35%), Greece (38%) and Portugal (39%). Although not exactly in the same order, the countries where people experience the biggest problems paying their bills in Europe are the same three countries (in Greece 84%, in Bulgaria 77% and in Portugal 70%).

¹¹ Eurobarometer wave 81.1

↳ Perceived life satisfaction in EU countries



By the end of 2013 the majority of Europeans expect no change to their personal situation in the next 12 months in relation to their local area (73%), their life in general (58%), and their job situation (60%) and household finances (59%). Those who expect change are a little more likely to think things will improve than that they will get worse, except in relation to household finances, where the reverse is true.

On social protection and inclusion indicators, most think that pension provision is worse (56%), and around half of Europeans perceive the situation has worsened in relation to unemployment benefits (50%), the healthcare system (49%) and the way their country addresses inequalities and poverty (47%). The only measure where Europeans are more likely to say the situation remains unchanged than it has worsened is relations between people from different cultural or religious backgrounds or nationalities (46% “unchanged” vs. 40% “got worse”).

4.

Business sector: Small is beautiful ?



4. Business sector – Small is beautiful?

Small and medium-sized enterprises (SMEs)¹² are the employment backbone of the European Union. **These 20.7 million companies represent more than 98% of all European businesses and provide 67% of total employment.** In 2013, Eurobarometer business surveys were carried out in order to get to know more about the resource efficient way they work, their competitiveness in terms of green markets (including comparison with the USA), to gauge their attitudes towards corruption and their willingness and attitude towards investing in intangibles.

The Flash Eurobarometer¹³ survey carried out in September 2013 revealed that almost all SMEs in Europe (92%) comply with environmental legislation – with 19% going further than required. 9 out of 10 are already taking at least one action to be more resource efficient, while 8 out of 10 SMEs are planning additional resource efficiency actions in the next two years.

Although SMEs in general seem to be keen on adopting resource efficient practices, the legal environment is not always making their job easier in Europe. More than half of SMEs (55%) encounter difficulties when trying to set up resource efficiency actions, particularly complex legal or administrative procedures (26%). Compared with the USA, where almost all SMEs are undertaking at least one resource efficiency action (99%), in the EU SMEs are six percentage points less likely to do so. Both in the EU and the USA minimising waste is the most common action taken. While resource efficiency actions are more likely to increase production costs in the USA (29% vs. 23% in the EU), US businesses are more likely to learn from each other than waiting for grants or subsidies in order to be more resource efficient. Whilst grants or subsidies would be most helpful for SMEs to be more resource efficient in the EU (34%), the demonstration of new technologies or processes is the most helpful for SMEs in the USA (36%).

SMEs in the USA are eight percentage points more likely to offer green products or services. The USA has seen a four per cent increase in the number of SMEs selling green products or services since 2012. Offering these products in the area of recycled material is much more common in the USA (60% vs. 35% at EU).

While green practices and the marketing of resource efficient products might raise the revenue of businesses, corruption is certainly hindering business in Europe. More than **4 out of 10 companies consider corruption to be a problem when doing business**¹⁴.

¹² Small and medium-sized enterprises are defined as those with a staff headcount below 250. In addition to the staff headcount ceiling, an enterprise qualifies as an SME if it meets either the turnover ceiling or the balance sheet ceiling, but not necessarily both. Full definition of SMEs can be found in:

http://ec.europa.eu/enterprise/policies/sme/facts-figures-analysis/sme-definition/index_en.htm

¹³ Flash Eurobarometer 381: *SMEs, Resource Efficiency and Green Markets*

¹⁴ Flash Eurobarometer 374: *Businesses' Attitudes Towards Corruption in the EU*

9 out of 10 companies
in Europe have already
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resource efficient.



SMEs in the USA are
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Corruption is a problem, but this is not companies' main problem when doing business. **Tax rates (72%) and fast-changing legislation and policies (70%) are the most frequently cited problems. Corruption is most likely to be considered a problem when doing business by companies in the Czech Republic (71%), Portugal (68%), Greece and Slovakia (both 66%).**

Three quarters of companies consider corruption to be widespread in their country and an absolute majority of companies agree that certain practices lead to corruption in their country. Eight out of ten companies agree that corruption comes from links between business and politics being too close, 73% agree that favouritism and corruption hampers business competition, and 69% agree that bribery and the use of connections are often the easiest way to obtain certain public services. Almost half (47%) of companies agree that the only way to succeed in business in their country is to have political connections.

Although participating in public tender or public procurement procedures is rather widespread (37%), more than 3 out of 10 companies that have participated in such a tender say corruption prevented them from winning. Companies are generally pessimistic about the way corruption is tackled in their country: six out of ten companies think it is unlikely that corrupt people or businesses would be caught. 42% of companies agree that measures against corruption are applied impartially and without ulterior motives in their country.

Looking at businesses from the customers' side, it is interesting to see from the results of a Eurobarometer survey¹⁵ published in 2013 that **just over half of European citizens believe that companies have a positive influence on society**, while more than 4 out of 10 believe companies have a negative influence. **Europeans are more sceptical about the influence of companies** than citizens from other major economies.

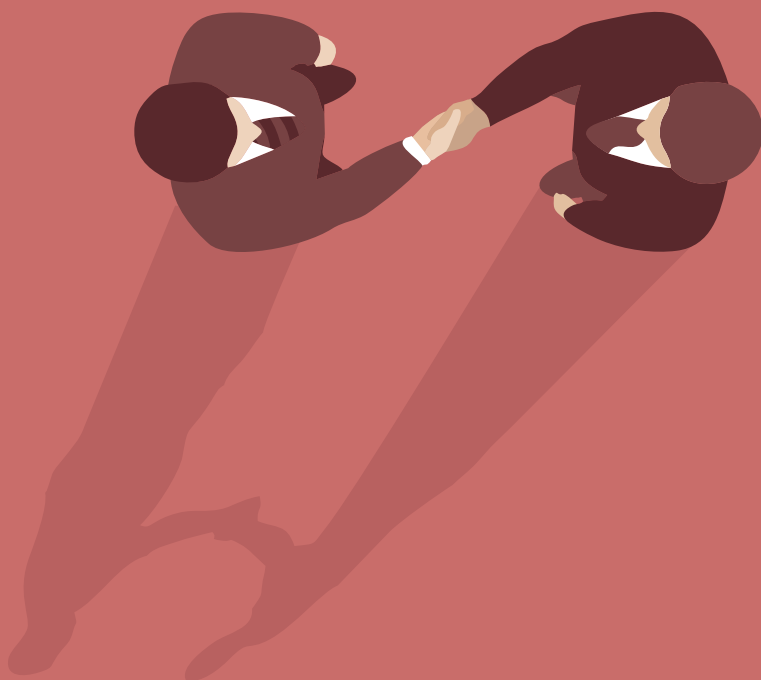
When compared with the EU, respondents living in non-European countries are much more likely to be positive about the overall influence of companies on society. For example 79% of Brazilian respondents think that companies have a positive influence on society. There is, however, a wide diversity of views across EU27¹⁶ countries, from the 85% of respondents in Denmark who think the influence of companies on society is generally positive, to 36% of those in Italy and Slovenia.

European respondents are much more likely to say that small and medium-sized companies (71%), rather than large companies (48%), make efforts to behave in socially responsible ways. More than half of Europeans who work at a company say their company has taken measures they consider effective

¹⁵ Flash Eurobarometer 363: *How companies influence our society: Citizens' view*

¹⁶ The survey was conducted before the accession of Croatia into the EU

Almost half of companies agree that the only way to succeed in business in their country is to have political connections



to behave in a socially responsible way (53%), in this international business survey, respondents in the USA are the most likely to say this (67%).

Europeans consider job creation (57%) to be the most positive influence companies have on society, followed at some distance by contributing to economic growth (32%) and providing training to employees (31%). In all EU countries job creation is the most mentioned positive effect of companies on society, as it is for all the non-European countries. Europeans consider corruption (41%), reducing staff (39%) and environmental pollution (also 39%) as the main negative effects of companies on society.

Europeans think that citizens themselves should take the lead in influencing the actions of companies through their decisions about what they buy (49%), followed by company management (40%) and public authorities (36%).

Access to finance – A joint survey of the European Commission and the ECB

The current economic environment has brought SME needs into particular focus given the significantly tightened credit supply conditions arising from the reduced ability and willingness of banks to provide the financing on which this sector is particularly reliant. The European Commission and the European Central Bank (ECB) decided in 2008 to collaborate on a survey¹⁷ on the access to finance of SMEs in the European Union and established the Survey on the Access to Finance of Small and Medium-sized Enterprises (SAFE). The survey, conducted across 37 countries, including the 28 European Union (EU) and euro area countries was undertaken in June-July 2009, in August-October 2011 and most recently in August-October 2013.

Finding customers remains the most widely cited problem for SMEs. Access to finance was the second most pressing problem for SME managers in the EU (mentioned by 15% of them). When looking at sources of financing used in the last six months, just over half of EU SMEs (54%) said that they had used only external financing, which was slightly lower than 2011 levels (56%). SMEs (i.e. firms with 1-249 employees) were more likely than larger enterprises (i.e. LSEs – firms with 250+ employees) to have only used external financing (54% compared with 43%). Nearly two-thirds of EU SMEs who applied for external finance got everything they applied for from banks or trade credit.

¹⁷ 2013 SMEs' Access to Finance survey at http://ec.europa.eu/enterprise/policies/finance/files/2013-safe-analytical-report_en.pdf

Half of Europeans think that citizens themselves should take the lead in influencing the actions of companies through their purchasing decisions.

Half (50%) of EU SMEs have taken out a loan in the past two years, the same overall level as seen in 2011 but still up on 2009 (46%). Among those SMEs expecting to grow in the next few years bank loans were clearly the most preferred source (among 67%) of external financing. This was slightly higher than the level seen for banks in 2009 and 2011 (both 63%).

Overall, well over half (57%) of EU SMEs had introduced at least one type of innovation (to products, services, production methods, sales or management) over the past 12 months in the way they ran their business. Larger businesses tended to be more innovative, 70% of LSEs having introduced an innovation in the last 12 months compared with 57% of SMEs.

Just over half of EU SMEs (51%) reported that their turnover had grown in the last three years, 38% growing by up to 20% per year and 13% growing over 20% per year. However, one in four (24%) said that their turnover had declined.

Over a third (36%) of EU SMEs have grown in staff numbers (full and part time) over the last three years. High levels of EU SMEs reported that their labour costs and other costs (such as materials and energy) had increased in the past six months, with net increase figures (those reporting an increase less those who have seen a decrease) of +43% and +60% respectively.

5.

The EU budget: Where does the money go?



5. The EU budget: Where does the money go?

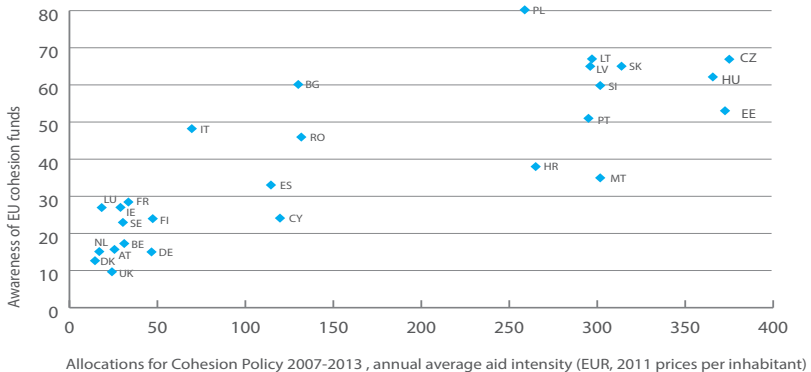
Most of the EU's budget is spent every year on the Common Agricultural Policy and the Regional Policy. Solidarity is of outmost importance in the EU, just as much as keeping up the European food supplies in a sustainable way. It is therefore essential to be able to take a closer look at what EU citizens think about these policies. In 2013 Eurobarometer surveys were carried to gauge into EU citizens' attitude towards Regional Policy¹⁸ and the Common Agriculture Policy¹⁹.

Regional policy

Around a third of Europeans (34%) have heard about at least one EU co-financed project to improve the area in which they live, a proportion which remains unchanged since June 2010. Approximately half of Europeans (52%) have heard of either the European Regional Development Fund or the Cohesion Fund. One in five (20%) of those aware of one of these funds say that they have benefited personally from an EU-funded project.

Country-level awareness of EU co-financed projects ranges from 80% in Poland to 10% in the UK, and shows a clear link between eligibility for funding under the Convergence Objective and local knowledge of EU-funded programmes.

Perceived life satisfaction in EU countries



¹⁸ Flash Eurobarometer 384: *Citizens' Awareness and Perceptions of EU Regional Policy*

¹⁹ Special Eurobarometer 410: *The Common Agricultural Policy*

Overall, there is strong support for EU-financed projects around Europe. About three quarters (77%) of those aware of EU co-financed projects say that such projects have had a positive impact on the development of their city or region, while only 9% think these projects have had a negative impact. The main criticism of EU co-financed projects is that funding was allocated to the wrong projects (an opinion voiced by three in ten of those who consider it to have had a negative impact)

Apart from the level of awareness, it is also interesting to see how EU citizens think EU money should be spent in the regions. Just over half of Europeans (52%) think that the EU should invest in all of its regions, while 42% say that it should only invest in the poorer regions. This is a turnaround compared with June 2010 when just under half said the EU should only invest in the poorer regions (49%, a decrease of 7 percentage points). Most Europeans say they would target funding at regions with high unemployment (78%) and deprived urban areas (54%), with border and growth regions less likely to be mentioned. Nine out of ten Europeans regard Education, health and social infrastructures as the most important sectors for investment.

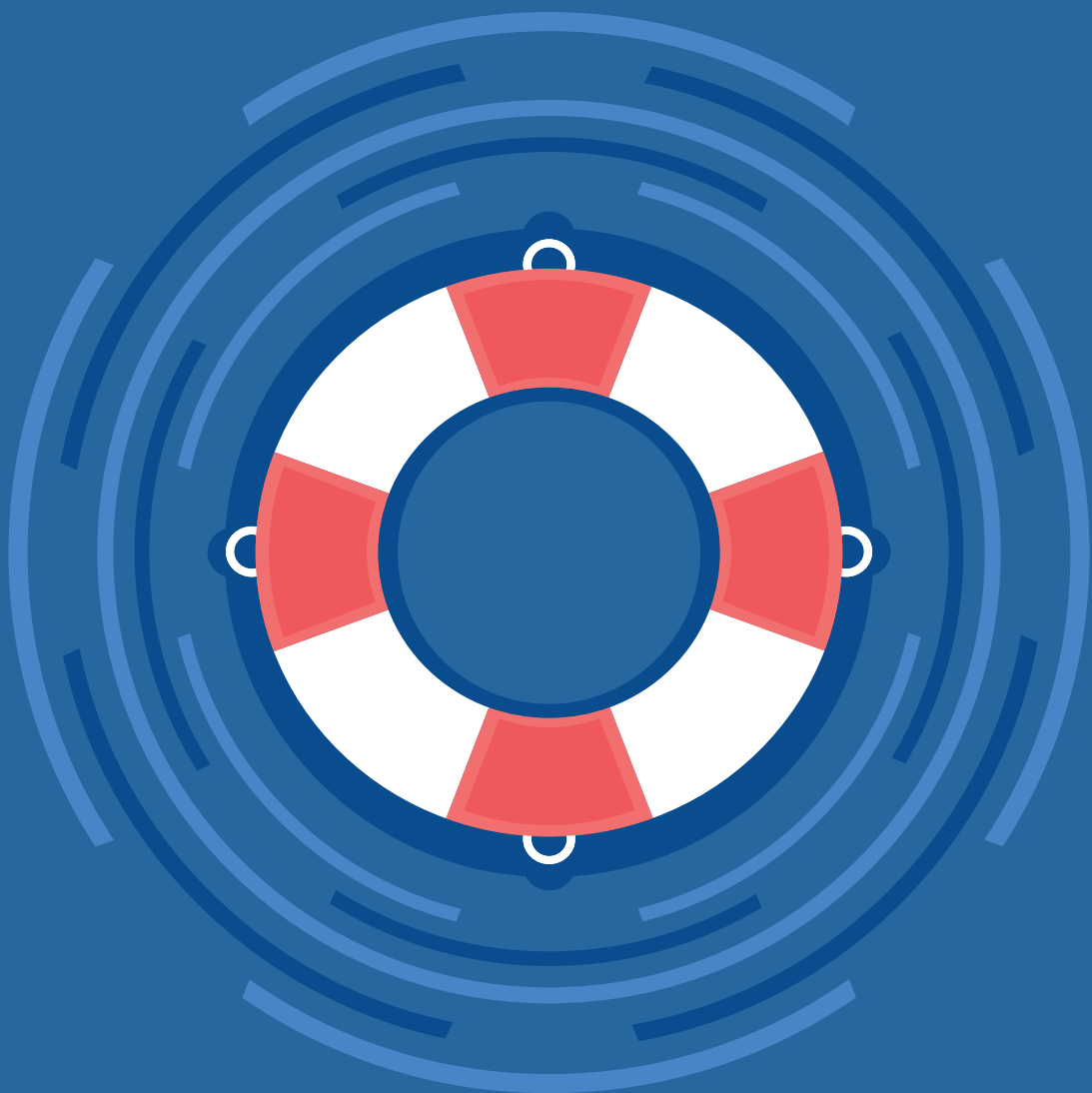
The Common Agricultural Policy

The Common Agriculture Policy is a relatively well-known policy of the EU: 64 percent of Europeans say they have heard of it. Agriculture as such is important for Europeans, since nine out of ten agree that agriculture and rural areas in general are important for our future. 87 percent of Europeans even agree that the diversity of agriculture and food products that exist across the Member States are important.

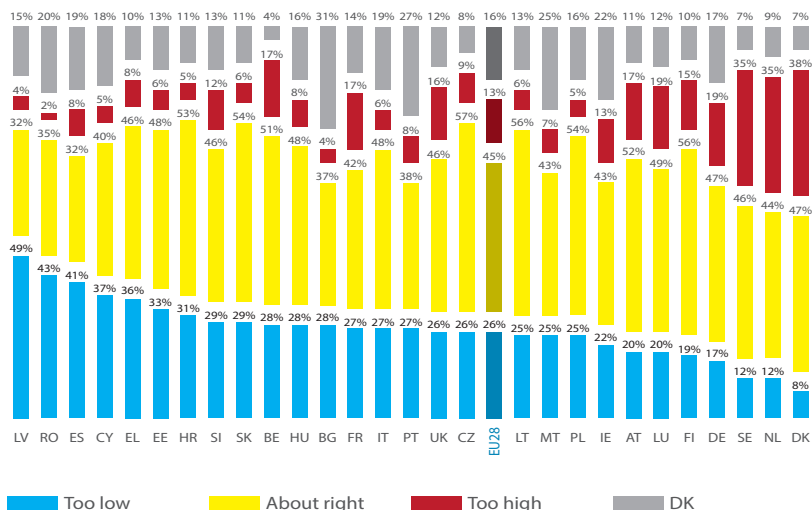
Compared with 2009, significantly more people in Europe have heard about the CAP (64% in 2013, 41% in 2009). The older, the more educated and male respondents are more likely to say they have heard of the policy. EU citizens across the continent are very supportive of the aims of the policy; even the least supported goal of the policy (developing rural areas in the EU in an equal way) is supported by 88% of the respondents.

Although criticism towards the EU about its budget is not uncommon in the media, about one quarter (26%) of respondents believe that the amount currently spent on the CAP is not enough, while 45% of Europeans think it is just enough. Only 13% of respondents believe that the financial support given to farmers is too much. Respondents in the different countries have a very different notion about the budget of CAP. In 17 Member States, at least one quarter of Europeans think the support given to farmers is not enough. In the Netherlands, Sweden and Denmark, at least one third of the respondents believe that the support given to farmers is too high.

The higher the aid intensity,
the higher is the awareness
of EU-funded programmes.



↳ Perceptions on aid given to farmers from the EU budget



Going deeper into the responsibilities of farmers, Europeans are rather divided. A little more than half of them believe that it is the farmers' responsibility to offer a range of quality agricultural products and about the same percentage of them believe that farmers are also responsible for creating employment in the countryside.

Looking behind the success of the CAP, it might be important to know where Europeans get their information from when it comes to the CAP and also, where they would most likely get their information from. Half of Europeans would want the information to come from the TV, while another half would choose the internet. This suggests that both the older and the younger generations are interested in receiving more information on the Common Agricultural Policy.

Nine out of ten Europeans agree that agriculture and rural areas in general are important for our future, and almost eight out of ten say that the CAP is beneficial for everyone in Europe.

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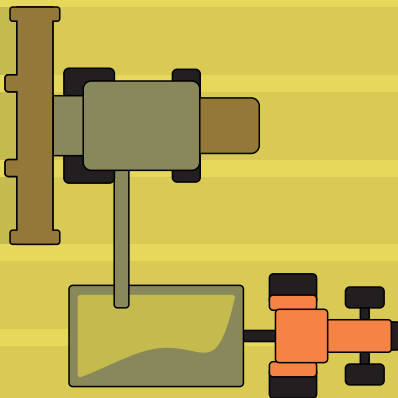
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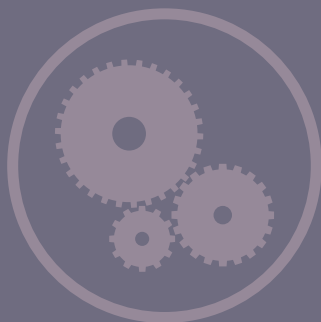
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Croatia, the newest Member State



6. Croatia, the newest Member State

Croatia joined the EU as the 28th Member State on 1 July, 2013. Although the Stabilisation and Association Agreement was signed already in 2001, the long negotiation process took more than a decade to complete. In the 2012 referendum on EU membership, where 43 % of the Croats participated, two thirds of the voters cast their ballots in favour EU membership.

In Spring 2013, 46 % of Croats had a positive feeling about the EU with 29 % of them being neutral in this question and 23 % of them saying that their image of the EU was rather negative. Comparing it to previous years, the rate of positive answers is rather stable with a slightly growing trend apart from a drop in 2009.

In terms of personal affiliations towards the EU, more than half of the Croats say that the EU means to them personally the possibility to travel, study and work anywhere in the EU. 'Economic prosperity' comes second on the list and 'peace' third. The EU had a positive image in relation to crisis management as well. In the spring of 2013 Croats were more optimistic than the EU average in thinking that the EU is going into the right direction to exit the crisis (55% vs. 42%). Moreover, 6 out of ten believed that the EU has done enough to help solve the economic crisis and almost the same percentage of them was convinced that Member States by themselves alone cannot handle the crisis.

There were also strong concerns about the readiness of the country's economy for EU accession: 77% say they feel the Croat economy is unprepared for membership. Compared with 2012, this figure has gone up by 13 percentage points, so fears have grown in this respect.

The expectations towards membership are very strong and positive. More than two thirds of the people expect employment opportunities in other Member States, rule of law, ability to finance projects and investment coming to Croatia from the EU.

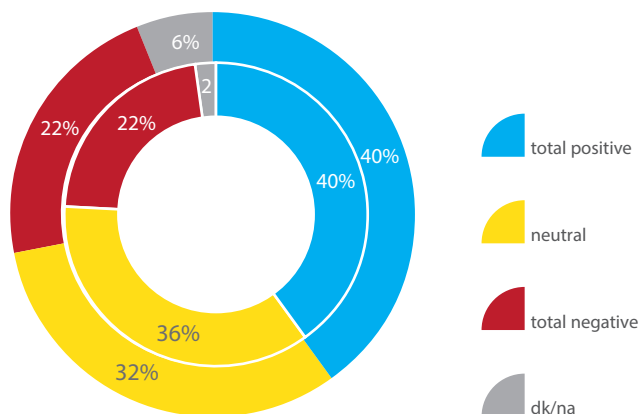
Support for the Euro as a single currency in the European economic and monetary union is rather high at 61%. However, when asked about the consequences of Euro introduction in their country, half of Croats say it would do more harm than good for the and only 18% are convinced that the Euro introduction would be beneficial.

While a full comparison is difficult to make between Central and Eastern European countries not only because of their historic roots, but because the accession of Croatia came at a very different time and under very different circumstances, it might be interesting to contrast Croat public opinion with public opinion of the 2004 new Member States (NMS) around the times of their accession.

In Croatia support for the Euro as a single currency is rather high at 61%. However, only 18% are convinced that Euro introduction would be beneficial to the country.



Perceptions on aid given to farmers from the EU budget



outer pie: New Member States' average (EB 2004.1)
inner pie: HR (EB79)

Title of the chart: Image of the EU in the then new Member States in 2004 and in Croatia in 2013

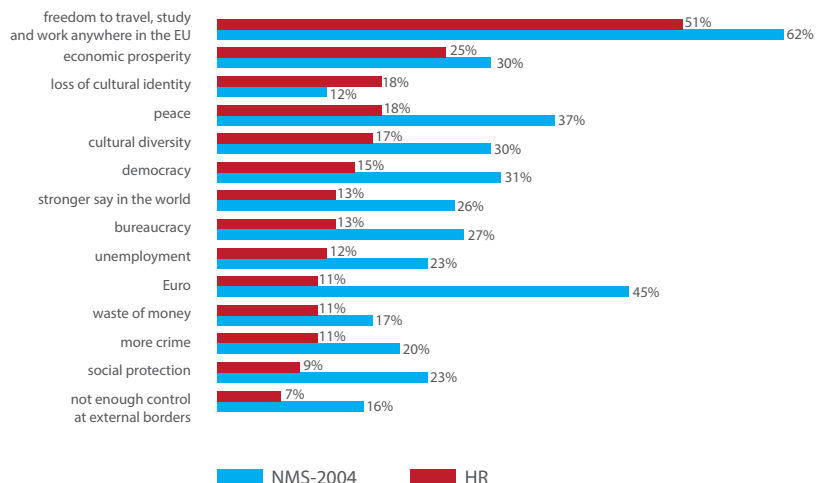
The image of the EU in Croatia in 2013 is very similar to that of the 10 New Member States which joined the EU in 2004. The picture is in details different in terms of what the EU means personally to the respondents. In 2004 new EU citizens from the ten associated mostly positive concepts with the EU and no fears were mentioned among the top 5 ideas. Croats seem to be more down-to-earth and in some ways pessimistic. Freedom to travel, work and study is foremost in Croats' minds, as it was for new EU citizens in 2004. The second most important item they attributed to the EU is 'economic prosperity'. It is also important to note that they listed the fear of 'loss of cultural identity' as the third most important item associated with the EU, while with the average of the then New Member States was among the least supported items.

Looking at the results of the first Standard Eurobarometer conducted after the accession of the country²⁰, the Croats' opinion on the image of the EU has not changed fundamentally. Nonetheless, an increase of 7 percentage points in the rate of neutral (43%) answers resulted in the neutral answers outnumbering positive answers (37%) as opposed to the result in spring 2013.

People in Croatia are still very pessimistic when it comes to the situation of their national economy. 96% of Croats believe that the state of their economy is bad. Compared with the data from spring 2013, there is a slight increase in the percentage of those who say that the country's economic situation will get worse in the next 12 months (42% up by 3 percentage points). This means that Croatia is not only still

²⁰ Standard Eurobarometer 80 (Autumn 2013)

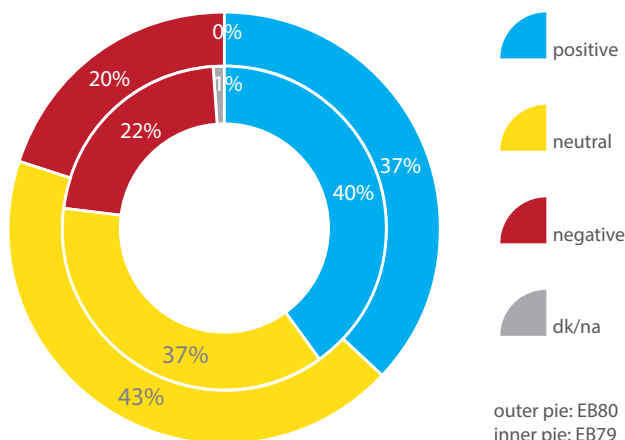
What does the EU mean to you personally?



among the most pessimistic countries is Europe, but as opposed to the EU average, Croats are more pessimistic when it comes to their future as well.

However, Croats are more optimistic than the EU average about the future of the economic situation in the EU. About one in every three Croat believes that the EU's economic situation will improve in the next 12 months against the EU average of 21 %. They are slightly more optimistic (but still below the EU average) when it comes to their own financial and job situation: 45% believe that the financial situation of their household is good, while 40% deem their personal job situation to be good. In spite of their optimism concerning their personal future, they see that the two most important challenges their country now face are unemployment and the economic situation.

The Image of the EU in Croatia





Working for a greener Europe



7. Working for a greener Europe

The threat of **climate change** is one of the greatest challenges of the modern age and preventing it is a key strategic priority for the European Union. In addition to the target of reducing greenhouse gas (GHG) emissions by 20% (or even 30% if other major economies commit to undertake their fair share of a global emissions reduction effort), the EU has set targets of generating 20% of energy needs from renewables and increasing energy efficiency by 20%. The EU budget for 2014-2020 (approved in November 2013) allocates at least a fifth of the total EU budget to climate-related spending, further highlighting the importance Europe attaches to tackling climate change.

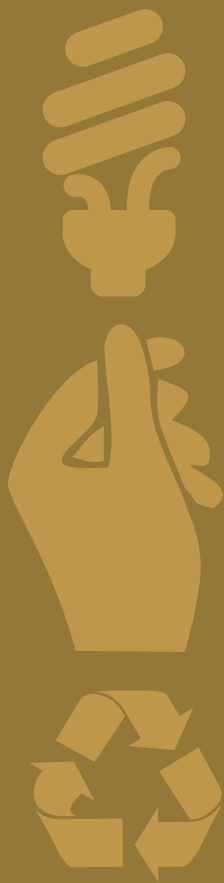
As Europe takes action to meet the objectives of preventing and minimising the impact of climate change, it is important to understand the attitudes and behaviour of the EU general population. From a Special Eurobarometer survey²¹ carried out in 2013 it seems that **half (50%) of all Europeans think that climate change is one of the world's most serious problems and around one in six Europeans (16%) think it is the single most serious problem.** Compared with 2011, there have been small decreases in the proportion of Europeans thinking climate change is the single most serious problem (-4 percentage points).

Climate change is perceived to be the third most serious issue facing the world, behind poverty, hunger and lack of drinking water and the economic situation. In 2011 it was seen as the second most serious, with the economic situation now seen as more serious. Europeans are most likely to think that responsibility for tackling climate change lies with national governments (48%), with slightly smaller proportions thinking responsibility lies with business and industry (41%) and the EU (39%). One in four Europeans (25%) thinks they have a personal responsibility for tackling climate change.

Half of all Europeans report that they have taken some form of action in the past six months to tackle climate change. When prompted with a list of specific actions to fight climate change, and with no timescale specified, the proportion reporting that they have taken some form of action rises to 89% of all Europeans, with this figure showing a small increase since 2011 (+4 percentage points). The action Europeans are most likely to say they have taken is to reduce their waste and regularly recycle it (69%). The other actions most widely undertaken include: trying to cut down on the use of disposable items (mentioned by 51%); buying local and seasonal produce whenever possible (36%); choosing new household appliances mainly because they are more energy efficient (34%); regularly using environmentally friendly forms of transport as an alternative to their own car (28%); and improving home insulation to reduce energy consumption (21%).

²¹ Special Eurobarometer 409: *Climate Change*

Half of all Europeans report that they have taken some form of action in the past six months to tackle climate change.



Europeans in general would like to see national governments act more in the field of climate change prevention. Just over nine in ten Europeans (92%) think that it is important for their government to provide support for improving energy efficiency by 2030, with around half (51%) saying that it is “very important” for their government to do so. Nine in ten Europeans (90%) think that it is important for their government to set targets to increase the amount of renewable energy used by 2030, with around half (49%) saying it is “very important”.

Four in five Europeans (80%) agree that fighting climate change and using energy more efficiently can boost the economy and jobs in the EU, with around three in ten (31%) saying that they “totally agree”. The results are similar to those from 2011. Seven in ten Europeans (70%) agree that reducing fossil fuel imports from outside the EU could provide the EU with economic benefits, with around one in four (26%) saying they “totally agree”.

While survey results show that half of all Europeans report to have taken some form of action to tackle climate change, it can also be seen that when it comes to the perception of personal, national or European concerns, climate change and green issues in general receive little attention. Only 6% of Europeans list the environment, climate change and energy among their main personal concerns²². According to the results of a Special Eurobarometer survey²³, although a substantial majority of Europeans agree that air and noise pollution are important problems in cities, every second European use a car every day. This is more than the proportion of those who cycle (12%) or use public transport (16%) every day combined. When asked about whose responsibility it would be to reduce traffic in the cities, the majority of Europeans believe this falls on city authorities (56%) and only about one third of them say it is the responsibility of citizens themselves.

²² Standard Eurobarometer 80

²³ Special Eurobarometer 406: *Urban mobility*

Conclusion



Conclusion

2013 was a special year for Eurobarometer. We saw the 80th Standard Eurobarometer published and we celebrated the 40th anniversary of this instrument. We have published two Standard Eurobarometers, 11 Special and 29 Flash surveys. While looking back at the results is an important moment for us, looking into the future is even more interesting not least given the political changes ahead in 2014.

In the course of 2014 the European Parliament and the European Commission will have new members and the Europe that we know now will probably change. Although Eurobarometer's task is not to predict election results, it does reveal the context in terms of European public opinion. This Almanac therefore sets the scene for the political year ahead in terms of comparative public opinion across Europe.

Optimism is on the rise in Europe. Despite the worst averages of the crisis, most Europeans still say they are optimistic about the EU's future and slightly more than 4 in 10 citizens believe that the EU is heading in the right direction to emerge from the crisis. The number of those who share the thought that the impact of the crisis on employment has reached its peak is on the rise.

Looking back at 2013, we also know that there are challenges. In a Europe where on average almost every other citizen does not trust their country's justice system, or where in 9 Member States over half of the population has problems paying their bills, there is still a lot to achieve.

Eurobarometer aims not only at measuring public opinion, but by providing sound analysis, its ambition is to contribute towards policy-making in the European Commission, so that the months and years ahead could truly show that we are really at a turning point in Europe.

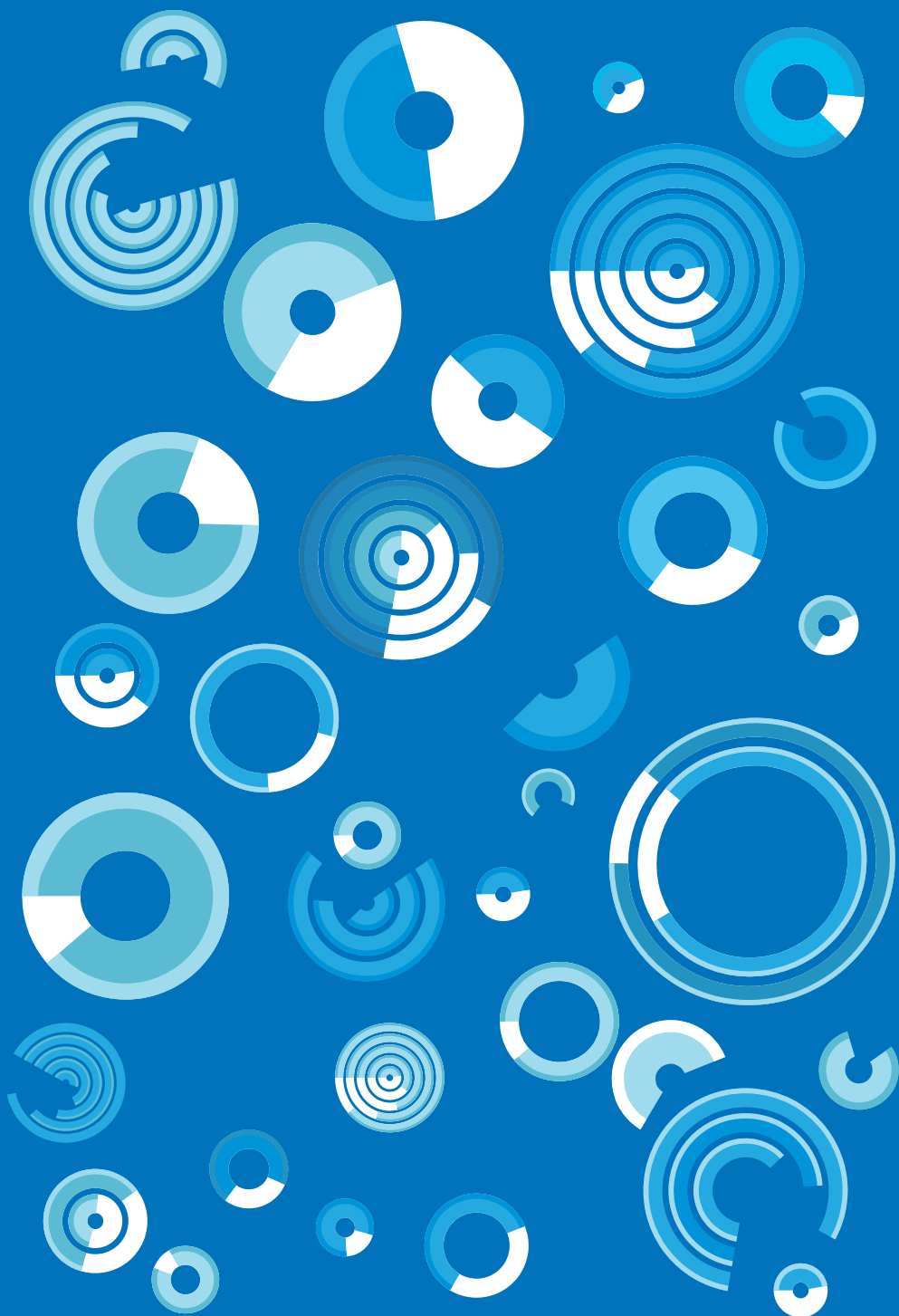
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