



EUROBAROMETER 70

PUBLIC OPINION IN THE EUROPEAN UNION

FIRST RESULTS

Fieldwork: October - November 2008

Publication: December 2008

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http://europa.eu.int/comm/public_opinion/index_en.htm

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Introduction

This report presents the first results of the Standard Eurobarometer wave 70, which was carried out from 6 October to 6 November 2008¹.

The last two waves of the Standard Eurobarometer (EB69-70) have seen significant shifts in European public opinion, with the economic crisis being the main driver of Europeans' perceptions and opinions in Autumn 2008. It is therefore essential to examine these results not only over a longer interval but also in the context of the specific circumstances in which these most recent surveys have taken place.

In Spring 2007, the strong state of the economy was reflected in highly positive short-term expectations and intense support for the EU and its institutions. Following the strong growth momentum of 2006-2007, the economic horizon has now significantly darkened as the European Union is hit by the financial crisis². Whilst the employment situation in the EU has so far battled the storm, the prognosis for the coming years is not good: by 2010, the rate of unemployment is expected to rise from 7.1% to 8.1% in the EU³.

These developments have a strong negative impact on consumer confidence in the EU: in October 2008, the Economic Sentiment Indicator declined sharply, recording its largest month-on-month decline ever to hit its lowest level since 1993⁴.

While in Spring 2007 (EB67) there was talk of an economic 'feel-good factor'⁵ illustrating the extended impact of the highly positive short-term economic expectations on European public opinion, this shifted to an economic 'feel-bad factor' in Spring 2008. At that time, public opinion was running somewhat ahead of reality, with perceptions far more negative than the objective situation. In Autumn 2008 reality has caught up with public opinion and the negative economic climate now permeates all aspects of life. The newest results show that the 'feel-bad factor' is not only affecting people's general sense of well-being but is also making them much more pessimistic and cautious in their attitudes towards public life: the world faces a crisis that some describe as the worse of the industrial era, and Europeans are seriously worried about its consequences.

Yet, in this negative climate, there are some positive signs which appear to signal the emergence of a new pattern in European public opinion towards the EU.

¹ For precise details of the fieldwork dates in each country, please refer to the technical specifications.

² See more: Autumn Economic Forecast 2008-2010 by the European Commission at http://ec.europa.eu/economy_finance/publications/publication13290_en.pdf

³ See page 42 above and EUROSTAT Euro-indicators October 2008 at <http://ec.europa.eu/eurostat/euroindicators>

⁴ DG ECFIN: Business and Consumer Survey Results October 2008 at http://ec.europa.eu/economy_finance/indicators/business_consumer_surveys/2008/bcs_2008_10_en.pdf

⁵ The 'economic feel good factor' refers to how good consumers feel about the economy which in turn affects their consumption habits. In this report, economic feel good/bad factor has an extended meaning and refers to its extended impact on opinions on questions other than economic issues.

This report is divided into two main parts. In the first part we present a set of trend indicators related to Europeans' expectations for the coming year and their main concerns. After that, the projection of this general opinion mood is analysed in terms of indicators that measure perceptions and opinions about the European Union and its institutions. Finally, we analyse how Europeans perceive the role of the European Union with regard to globalisation, a theme which is not only attuned to the period of Autumn 2008 but also profoundly entangled with today's European reality.

In the second part we explore four additional themes: the conflict in Georgia; the fall of the Iron Curtain and the subsequent enlargement of the European Union; the European Union budget, and the objectives for the building of Europe.

The methodology used is that of the Standard Eurobarometer surveys of the Directorate-General for Communication ("Research and Political Analysis" Unit). A technical note concerning the interviews, carried out by the institutes within the TNS Opinion & Social network, is annexed to this report. This note describes the interview method used, as well as the confidence intervals⁶.

The reader should be aware that there are three types of report for the Standard Eurobarometer.

1) First Results: This gives a concise highlights package of results for trend indicators, thereby providing an at-a-glance overview of the state of European public opinion on key issues.

2) Full Report: An in-depth analysis of all the questions asked in a Standard Eurobarometer wave.

3) National Reports: Analysis focusing mainly on the comparison between national results and the EU average. They are published by the national representations of the European Commission and written in national language(s). Executive summaries of these national reports exist and are published in English on the 'europa' website.

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

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

We would like to take the opportunity to thank all the respondents across the continent who have given their time to take part in this survey.

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

⁶ The results tables are included in the annex. It should be noted that the total of the percentages in the tables of this report may exceed 100% when the respondent can give several answers to the same question.

In this report, the countries are represented by their official abbreviations. The abbreviations used in this report correspond to:

ABBREVIATIONS

EU27	European Union – 27 Member States
DK/NA	Don't know / No answer
BE	Belgium
BG	Bulgaria
CZ	Czech Republic
DK	Denmark
<i>D-E</i>	<i>East Germany</i>
DE	Germany
<i>D-W</i>	<i>West Germany</i>
EE	Estonia
EL	Greece
ES	Spain
FR	France
IE	Ireland
IT	Italy
CY	Republic of Cyprus*
CY (tcc)	Area not controlled by the government of the Republic of Cyprus
LT	Lithuania
LV	Latvia
LU	Luxembourg
HU	Hungary
MT	Malta
NL	The Netherlands
AT	Austria
PL	Poland
PT	Portugal
RO	Romania
SI	Slovenia
SK	Slovakia
FI	Finland
SE	Sweden
UK	The United Kingdom
HR	Croatia
TR	Turkey
MK	The former Yugoslav Republic of Macedonia**

* Cyprus as a whole is one of the 27 European Union Member States. However, the "*acquis communautaire*" is suspended in the part of the country that is not controlled by the government of the Republic of Cyprus. For practical reasons, only the interviews conducted in the part of the country controlled by the government of the Republic of Cyprus are recorded in the category "CY" and included in the EU27 average. The interviews conducted in the part of the country not controlled by the government of the Republic of Cyprus are recorded in the category "CY(tcc)" [tcc: *Turkish Cypriot Community*].

** Provisional code which does not prejudice in any way the definitive nomenclature for this country, which will be agreed following the conclusion of negotiations currently taking place at the United Nations.

PART I: TREND INDICATORS

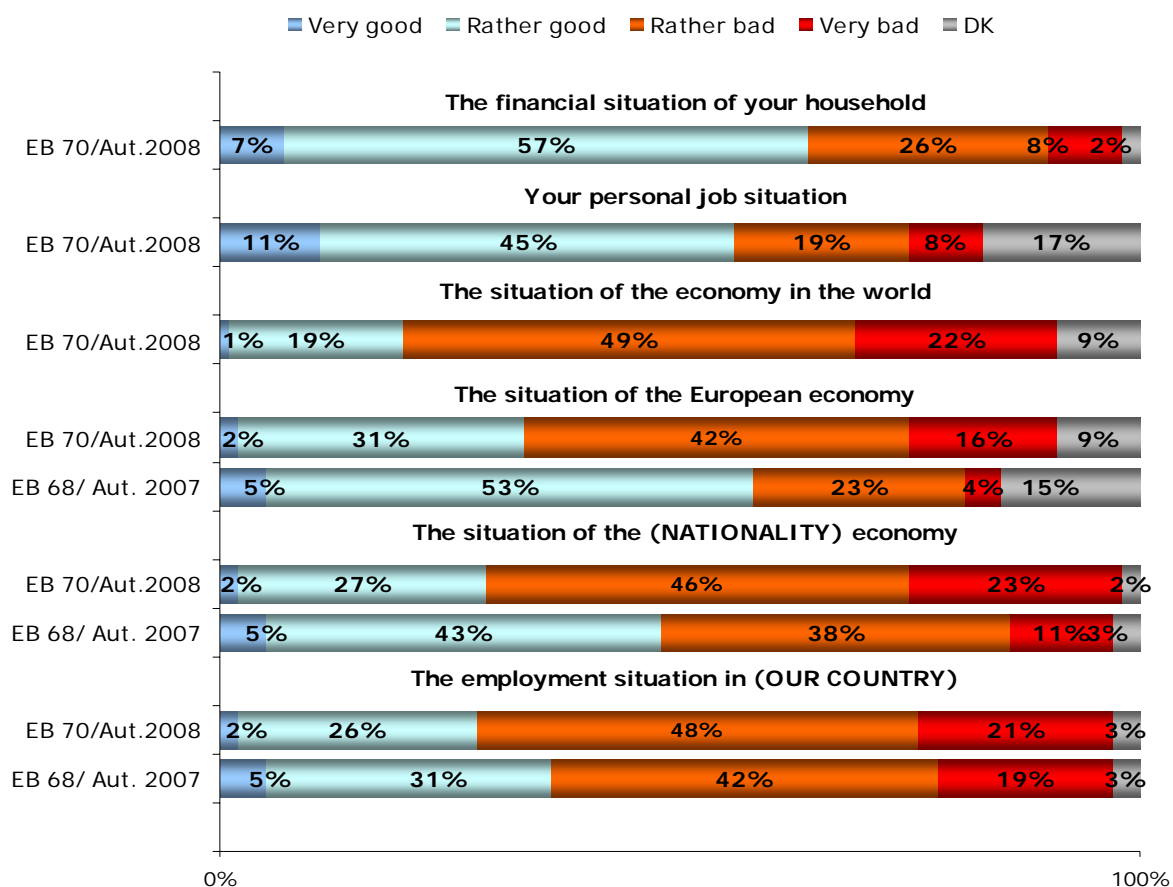
1. EVALUATION OF THE ECONOMIC SITUATION

A. Assessment of the current situation

- Perception of the current economic situation is decisively pessimistic -

On a regular basis, Europeans are asked to judge the current situation of the economy in their country and in the European Union. For the first time, Europeans were also asked to judge the economic situation in the world and to assess their personal economic situation⁷.

QA4a How would you judge the current situation in each of the following? - %EU





























































If in Autumn 2007 public opinion regarding the economic situation was still somewhat divided, the mood a year later is clearly pessimistic. The most recent results show that **assessments of the economy are now distinctly negative**, with a broad majority of respondents judging the current economic and employment situation as bad. Europeans appear particularly pessimistic about the

⁷ QA4 How would you judge the current situation in each of the following? 1. The situation of the (NATIONALITY) economy. 2. The situation of the European economy. 3. The situation of the world economy. 4. Your personal job situation. 5. The employment situation in (OUR COUNTRY). 6. The employment situation in (OUR COUNTRY).

global economic situation, which 71% of respondents consider to be bad. It should be noted that the situation of the European economy is seen somewhat more positively (33% of respondents consider it as good) than is the situation of the national economy (29%) or the global economy (20%).

The table below presents by country⁸ the highest and lowest proportions of respondents assessing the current situation positively i.e. those who consider it as good (percentage of answers 'very good' + 'rather good') in Autumn 2008:

ASSESSMENT OF THE CURRENT SITUATION: % GOOD											
The situation of the European economy			The situation of the (NATIONALITY) economy			The employment situation in (OUR COUNTRY)			The situation of the economy in the world		
	EU27	33%		EU27	29%		EU27	28%		EU27	20%
	SK	62%		FI	78%		DK	91%		PL	41%
	NL	57%		DK	70%		NL	88%		LT	38%
	PL	56%		NL	67%		FI	72%		SI	35%
	FI	56%		LU	60%		AT	61%		SK	35%
	SI	55%		AT	60%		CY	52%		BG	34%
	BG	54%		SK	54%		SE	48%		RO	34%
	DK	54%		SE	54%		MT	45%		CZ	32%
:	:	:	:	:	:	:	:	:	:	:	:
	EL	24%		BG	14%		LV	16%		EL	11%
	ES	22%		IE	14%		IT	13%		IE	11%
	FR	20%		FR	12%		ES	10%		CY	11%
	UK	19%		EL	10%		FR	10%		FR	9%
	IE	18%		PT	8%		EL	8%		PT	7%
	IT	15%		LV	7%		HU	5%			
	PT	11%		HU	5%		PT	4%			

The country-by-country analysis reveals that in some countries assessments are significantly more positive than in others. Slovakia, the Netherlands, Denmark and Finland rank among the most positive countries for three of the four 'economic' items. Conversely, Portugal, Hungary, Greece, France, Ireland and Italy are countries where the mood is generally least optimistic.

Several other distinctions become evident from the national analysis:













































- ◆ Positive assessments of the **national economy** are most often voiced by citizens from the Western European and Nordic countries. Slovakia (54%), Cyprus (53%) and Slovenia (52%) are the only newer members where more than half of the citizens feel that the situation of their national economy is good.

⁸ For further information on national results, the reader is invited to consult the full data tables that are annexed to this report.

- ◆ Conversely, positive assessments about the **world economy** are most often voiced by citizens from the newer Member States. Cyprus (11% good), Malta (12%) and Hungary (20%) are the exceptions.
- ◆ As in Spring 2008, the most positive assessments of the current **national employment situation** are expressed by respondents from Denmark (91% good; 39% very good). In the Netherlands (88% good; 20% very good), opinions are also very positive, although expressed less strongly.

An examination of the shifts in positive assessment levels since Autumn 2007 at the national level (i.e. the evolution of the percentage of respondents who consider the situation as good) provide insight in the depth of the current 'feel-bad' factor to which we refer in the introduction of this report. These shifts highlight the fact that in many of the countries where the assessment is 'positive', dramatic falls have nonetheless been recorded over the past year.

ASSESSMENT OF THE CURRENT SITUATION
CHANGE AUTUMN 2008 – AUTUMN 2007 IN % GOOD (percentage points)

The employment situation in (OUR COUNTRY)			The situation of the (NATIONALITY) economy			The situation of the European economy		
	EU27	-8		EU27	-19		EU27	-25
	DE	+10		SK	+9		BG	-6
	CY	+7		CY	0		SK	-7
	SK	+7		PT	-2		RO	-16
	BG	+3		BG	-3		CZ	-17
	PL	+3		CZ	-3		DE	-18
	SI	+3		HU	-3		CY	-19
⋮	⋮			RO	-4		NL	-20
	LV	-22	⋮	⋮		⋮	⋮	
	UK	-26		DK	-27		AT	-31
	ES	-29		ES	-31		EE	-32
	LT	-29		SE	-32		SE	-33
	SE	-31		BE	-37		ES	-35
	EE	-33		EE	-39		BE	-38
	IE	-55		UK	-45		EL	-40
				IE	-62		IE	-48

- ◆ Views about the **national employment situation** have improved in a number of newer Member States, but most strongly in Germany (41%; +10 points). In fact, over the last year, unemployment fell in Germany although the economic slowdown is expected to result in a (temporary) increase in unemployment in 2009⁹. Conversely, the most dramatic drop in confidence levels has been recorded in Ireland (-55 points), followed































⁹ EUROSTAT Euro-indicators October 2008 at <http://ec.europa.eu/eurostat/euroindicators>

by Estonia (-33 points), Sweden (-31 points), Lithuania and Spain (both -29 points). In Spain, Ireland and Lithuania unemployment has already increased, and the prognosis for all these countries is bad: in Sweden, unemployment is expected to rise rapidly in 2009-2010 and in Estonia employment will start to decline¹⁰.

- ◆ Slovakia is the only country where public assessment of the **national economy** is now more positive than it was in Autumn 2007 (54%; +9 points)¹¹. Conversely, the most negative development is again found in Ireland (-62 points) where confidence in the national economy appears to have vanished. The situation is also considerably less positive in the UK (-45 points), Estonia (-39 points), Belgium (-37 points), Sweden (-32 points) and Spain (-31 points).
- ◆ Views about the **European economy** have worsened in all Member States. With the EU Member States already or set to enter a recession and the outlook for 2009 being bleak, public opinion seems very much in line with reality¹².

Despite the economic malaise, Europeans remain comparatively rather positive about their **personal economic situation**: 64% are positive about the financial situation of their household and 56% find their current job situation good.

The table below presents by country the highest and lowest proportions of respondents assessing the current situation positively in Autumn 2008:

ASSESSMENT OF THE CURRENT SITUATION: % GOOD					
The financial situation of your household			Your personal job situation		
	EU27	64%		EU27	56%
	NL	92%		DK	78%
	SE	91%		SE	73%
	FI	89%		NL	72%
	DK	86%		FI	72%
	BE	79%		LU	70%
	LU	79%		AT	69%
	DE	74%		MT	68%
⋮	⋮	⋮	⋮	⋮	⋮
	LT	56%		IT	48%
	IT	52%		LT	47%
	EL	46%		BG	41%
	RO	44%		RO	40%
	BG	34%		EL	37%
	PT	30%		PT	36%
	HU	25%		HU	25%

¹⁰ Autumn Economic Forecast 2008-2010 by the European Commission at http://ec.europa.eu/economy_finance/publications/publication13290_en.pdf

¹¹ Slovakia will introduce the euro in 2009 and will hence become part of the euro zone.

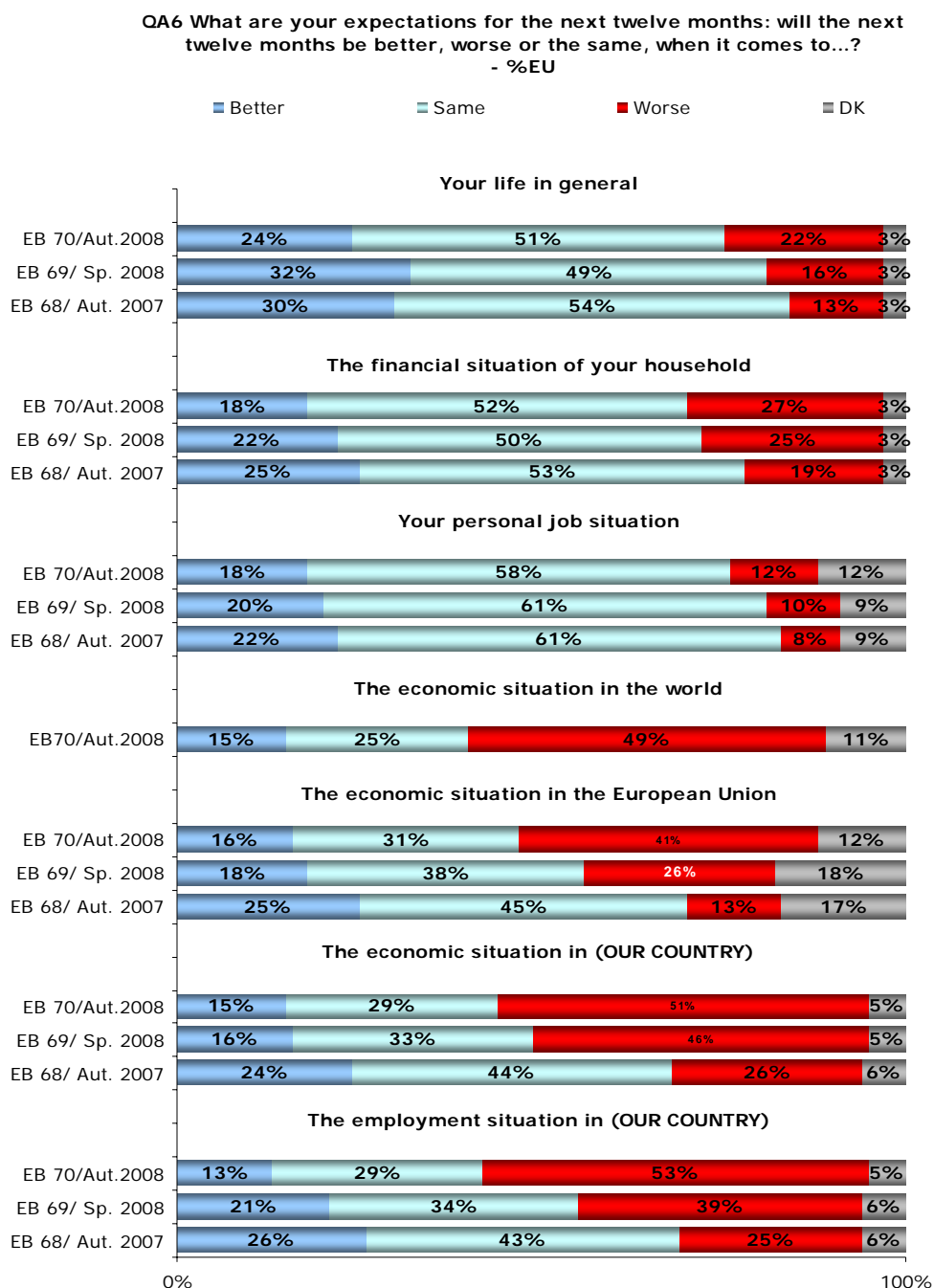
¹² See again Autumn Economic Forecast 2008-2010 by the European Commission at http://ec.europa.eu/economy_finance/publications/publication13290_en.pdf

- ◆ The assessment of the **household financial situation** is extremely positive in the Netherlands (92% good; 29% very good) and in the Nordic countries. The ranking of the countries somewhat highlights the geographical gap in living conditions. The countries where opinions are least positive in this regard are either Southern European or Eastern European nations.
- ◆ The same geographical division is evident in how people assess their **personal job situation**. Here again, citizens from Southern and Eastern Europe are least positive.
- ◆ Hungary and Portugal stand out as being particularly negative concerning both dimensions.

B. Short-term expectations

- Record low short-term expectations -

Europeans are also regularly asked to state their short-term expectations regarding the national economic and employment situation and the economic situation in the European Union. For the first time, opinions regarding the economic situation in the world were also measured¹³.



¹³ QA6 What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...? 1. Your life in general. 2. The economic situation in (OUR COUNTRY). 3. The financial situation of your household. 4. The employment situation in (OUR COUNTRY). 5. Your personal job situation. 6. The economic situation in the EU. 7. The economic situation in the world.

In Autumn 2008, expectations for the economy over the next twelve months are very pessimistic: **the largest segment of European public opinion believes that the national employment and economic situation (53% and 51% 'worse', respectively), as well as the world economy (49%) and the EU economy (41%), will deteriorate in the coming 12 months.**

Europeans still have more positive expectations concerning their lives in general (24% 'better'), the financial situation of their household and their personal job situation (18% each). They tend, however, to believe that the situation will remain the same rather than improve (51%, 52% and 58% 'same' respectively). However, those expecting their financial situation to worsen (27%) outnumber those with a positive outlook, a shift that was noted for the first time in Spring 2008.

When comparing the most recent results with those from the previous Eurobarometer wave in Spring 2008, **public expectations regarding the economy continue their downward spiral**¹⁴. This is evident when analysing the evolution of the item "worse":

- ◆ The expectation that the European economic situation (+15 points since Spring 2008) will worsen has nearly caught up with expectations of the worsening of the national economy (+5) for which the largest drop had already been recorded between Autumn 2007 and Spring 2008;
- ◆ The expectation that the national employment situation will worsen in the next 12 months again increased of 14 points between two consecutive Eurobarometer waves;
- ◆ The expectation that life in general will worsen sees a further increase (+6) between Spring and Autumn 2008;
- ◆ Expectations regarding the financial situation of European households and the personal job situation form the exception as these have not worsened significantly (both +2).

When we measure the situation in Autumn 2008 by the index¹⁵, the extent of pessimism becomes even more evident: only with regard to the personal job situation and life in general does a positive outlook prevail, but even here the trend is negative.

¹⁴ Between Autumn 2007 and Spring 2008, the proportion of "worse" answers had already increased considerably.

¹⁵ The index is calculated by deducting those who expect 'worse' from those who expect 'better'. The higher the index is, the more positive is the overall situation in a country.

Expectations for the next 12 months: INDEX 'BETTER – WORSE'

	Better - Worse Autumn 2008 (EB70)	CHANGE INDEX ¹⁶ Autumn 2008 - Spring 2008
Your personal job situation	+6	-4
Your life in general	+2	-14
Financial situation of your household	-9	-6
Economic situation in the EU	-25	-17
Economic situation in the world	-34	N/A
Economic situation in (OUR COUNTRY)	-36	-6
Employment situation in (OUR COUNTRY)	-40	-22

In Autumn 2008, the index is now particularly negative concerning **national employment** (-40 index points) and the **economic situation** (-36).
























































The economic 'feel-bad' factor that surfaced in the Spring 2008 Eurobarometer has intensified. Concerns about the economic crisis are no longer restricted to the national situation: high negative scores are now also noted concerning the **economic situation in the EU** (-25). Expectations of the **economic situation in the world** are also very negative (-34). Again, it should be mentioned that there is slightly less pessimism regarding the European level - although this is still the view of a relative majority of Europeans – than for the national and global levels.

Furthermore, the 'feel-bad' factor in Autumn 2008 has been further extended to the personal realm. Negative developments are noted for the three personal measures, with expectations for **life in general** dropping by 14 index points since Spring 2008. The gap between positive and negative expectations has never been this small for this measure (+2 index points).

¹⁶ The column 'change index' is calculated based on the evolution between waves. For example, in Spring 2008, the index (i.e. the % of 'better' minus the % of 'worse') stood at +16 for 'Your life in general', while it is now at +2. Consequently, the change since the last wave is: index Autumn 2008 – index Spring 2008 = – 14.

The table below presents the results by country, showing the highest and lowest index scores for the four economic measures in Autumn 2008:

EXPECTATIONS FOR THE NEXT TWELVE MONTHS: INDEX BETTER-WORSE (percentage points)

The economic situation in the EU			The economic situation in the world			The economic situation in (OUR COUNTRY)			The employment situation in (OUR COUNTRY)		
	EU27	-25		EU27	-34		EU27	-36		EU27	-40
	RO	+10		PL	-2		RO	-6		PL	-4
	BG	+6		RO	-2		PL	-11		BG	-6
	PL	+4		BG	-2		IT	-21		RO	-7
	MT	-4		LV	-6		SK	-21		MT	-9
	LV	-6		EE	-19		DK	-22		SK	-12
	SK	-12		MT	-23		BG	-23		IT	-26
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	AT	-42		BE	-53		LT	-50		PT	-55
	EL	-44		IE	-54		NL	-51		SE	-55
	BE	-48		LU	-56		PT	-51		BE	-57
	LU	-49		EL	-56		FI	-51		EL	-58
	IE	-49		NL	-61		EL	-59		FI	-62
	NL	-51		FI	-66		HU	-62		HU	-63
	FI	-56					IE	-64		IE	-70
























































The economic 'feel-bad factor' is generally present throughout the European Union, although the intensity is not the same. The economic situation in the EU is the only aspect for which positive expectations outnumber negative expectations in three countries, Romania (+10 index points), Bulgaria (+6) and Poland (+4). Citizens in these three countries are also (among) the least pessimistic when it comes to the other economic measures.

Several other distinctions become evident from the national analysis:

- ◆ The least 'pessimistic' countries are all Eastern European nations, with the exception of Italy, Denmark and Sweden.
- ◆ Furthermore, Finnish, Irish and Greek respondents, as well as those from the Netherlands and Hungary are among those who are most sceptical about the short-term development of the economic situation.

It should be noted that the emergence of the economic 'feel-bad factor' became evident in Spring 2008.

In Autumn 2008, this negative trend continues, and gets worse, although there are also a few positive developments:







































EXPECTATIONS FOR THE NEXT TWELVE MONTHS: CHANGE IN INDEX ¹⁷ AUTUMN 2008 (EB70) – SPRING 2008 (EB69)								
The economic situation in (OUR COUNTRY)			The economic situation in the EU			The employment situation in (OUR COUNTRY)		
 EU27		-6	 EU27		-17	 EU27		-22
 IT		+11	 IT		-3	 IT		+5
 UK		+8	 BG		-9	 EL		+1
 FR		+8	 LV		-9	 PT		-
 DK		+5	 SE		-10	 ES		-6
			 FR		-11	 CY		-6
					∴			
					∴			
			 BE		-26	 BG		-7
			 CZ		-26	 HU		-10
			 SK		-26	 LU		-11
			 DE		-27			
			 HU		-27			
 EE		-10	 MT		-27			
 SK		-14	 EE		-28			
 IE		-16	 EL		-28			
 NL		-19	 NL		-28	 CZ		-32
 PL		-20	 FI		-28	 PL		-32
 CZ		-21	 IE		-31	 AT		-34
 DE		-23	 AT		-32	 SE		-35
 FI		-23	 CY		-37	 BE		-36
 LT		-32	 LT		-43	 MT		-36
 AT		-34				 DE		-39
 MT		-49				 NL		-51
						 FI		-65
						 LT		-66

- ◆ Further dramatic downward trends are observed for nearly all aspects here, particularly regarding expectations for the national employment situation.
- ◆ Respondents in the three Member States with systematically higher expectations in Spring 2008 than in Autumn 2007 – Cyprus, the Czech Republic and Malta – now all record very large drops. Conversely, public opinion in countries where expectations fell sharply between Autumn 2007 and Spring 2008 is now more stable. This holds particularly for Italy, where expectations regarding the national economic and employment situation have improved, and to a lesser extent for France where expectations regarding the national economic situation have improved.
- ◆ Lithuanian respondents tend to have significantly lower expectations this Autumn than in Spring 2008. Finland and Austria are also found

¹⁷ For explanation on the column 'change index' please see footnote page 13.















































consistently towards the bottom of the table, as is the Netherlands. The 'feel-bad factor' has thus reached countries where the majority assess the economic situation as relatively good.

As noted earlier, in Autumn 2008 the 'feel-bad factor' is now also affecting people's **personal economic expectations**. However, it has not filtered through to all Member States. The table below presents the results by country, showing the highest and lowest index scores for the three personal measures in Autumn 2008:

PERSONAL EXPECTATIONS FOR THE NEXT TWELVE MONTHS: INDEX BETTER-WORSE (percentage points)								
Your personal job situation			Your life in general			The financial situation of your household		
	EU27	+6		EU27	+2		EU27	-9
	SE	+18		SE	+32		DK	+17
	DK	+17		DK	+27		SE	+15
	FR	+13		FI	+14		RO	+4
	NL	+13		ES	+8		FI	+3
	PL	+10		FR	+8		ES	-2
	UK	+10		RO	+8		LV	-2
:	:	:	:	:	:	:	:	:
	CY	0		CZ	-7		BG	-18
	EL	-1		DE	-7		LT	-20
	IE	-8		PT	-13		EL	-20
	PT	-16		HU	-35		CY	-22
	LT	-21					IE	-26
	HU	-28					PT	-35
							HU	-48

- ◆ Regarding expectations for life in general, the personal job situation and the financial situation of respondents' households, overall respondents in Sweden and Denmark have the most positive opinions.
- ◆ Expectations regarding developments in the personal sphere are also largely positive in France, Finland, the Netherlands and Romania.
- ◆ High negative expectations are voiced by people in Hungary, Portugal and Lithuania on all three personal aspects.

For all three personal aspects the expectations in Autumn 2008 are more negative than in Spring 2008. The table below presents the shifts in the index scores from Spring 2008 to Autumn 2008 by country:

PERSONAL EXPECTATIONS FOR THE NEXT TWELVE MONTHS: CHANGE IN INDEX ¹⁸ AUTUMN 2008 (EB70) – SPRING 2008 (EB69)								
Your personal job situation			The financial situation of your household			Your life in general		
	EU27	-4		EU27	-6		EU27	-14
	IT	+3		IT	+2		IT	-1
	BG	-1		ES	+2		ES	-5
	PT	-2		BG	+1		BG	-5
	SI	-2		DE	-		PT	-5
	ES	-2						
	∴	∴		∴	∴		∴	∴
				FI	-10			
	NL	-8		HU	-11			
	CY	-8		SI	-11		FR	-19
	UK	-9		AT	-13		BE	-20
	HU	-9		NL	-14		RO	-21
	EE	-10		UK	-15		LU	-21
	LU	-10		RO	-20		CY	-23
	MT	-10		EE	-22		UK	-26
	RO	-12		MT	-23		IE	-27
	IE	-13		IE	-28		MT	-28
	LT	-34		LT	-33		LT	-29

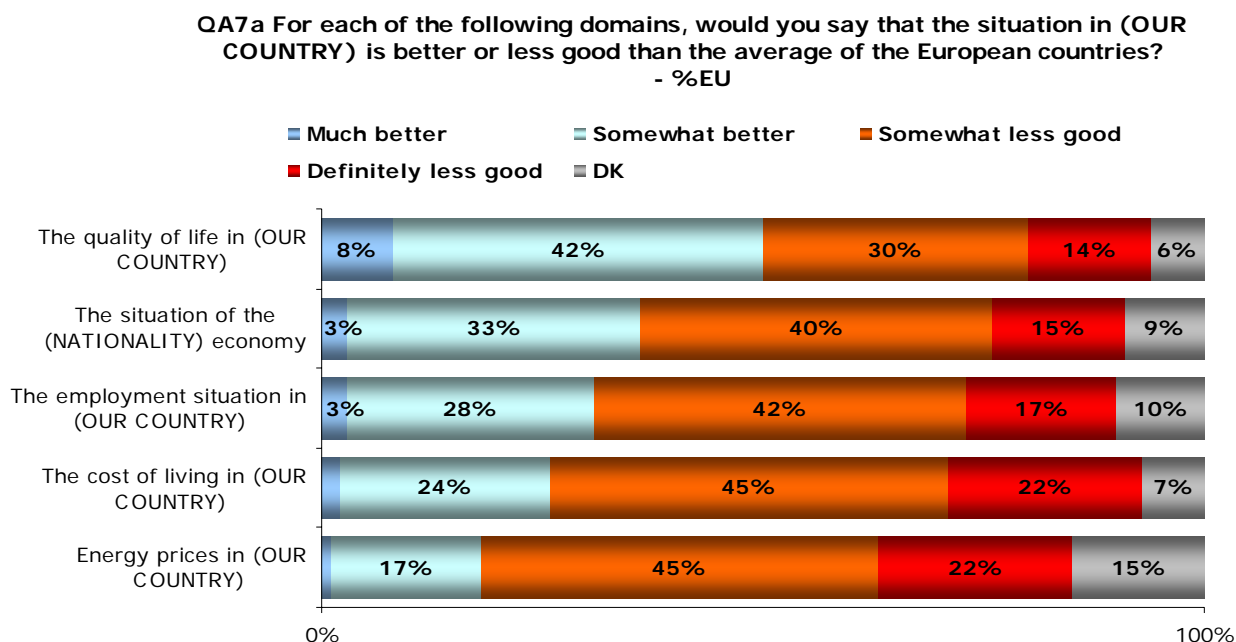
- ◆ In the European Union Member States, we can not speak of any significant improvements in personal expectations for the next 12 months. Italy and Spain are the only countries where small improvements (not greater than 3 index points) are noted. In fact, when it comes to life in general the mood throughout the European Union is now more negative.
- ◆ In Lithuania, the most dramatic downward trend is observed for all aspects. Pessimism has also become much more widespread in Ireland and Malta.

¹⁸ For explanation on the column 'change index' please see footnote page 13.

C. Comparison of the economic situation

- National conditions considered to be worse than average -

Finally, the analysis of the perceived economic situation focuses on how Europeans compare their national situation with the average of European countries.¹⁹



Europeans tend to **believe that the (economic) situation in their own country is worse than the average of European countries. In fact, we have already previously observed the tendency of Europeans to rate the European economy as better than their respective national economies.** Europeans are particularly negative about the cost of living and energy prices in their country compared to the European average. The only aspect where an outright majority rates the national situation as better than the European average is quality of life: 50% of respondents believe this is better in their own country, compared to 44% who think it is worse than the European average.

At the country level, opinions correspond to how people rate their national economic and employment situation: in countries where the national economic and employment situation is perceived to be good, we tend to find high positive results and in countries where the opposite holds and where people have more faith in the European economy, we find high negative scores²⁰.

¹⁹ QA7 For each of the following domains, would you say that the situation in (OUR COUNTRY) is better or less good than the average of the European countries? 1. The situation of the (NATIONALITY) economy. 2. The employment situation in (OUR COUNTRY). 3. The cost of living in (OUR COUNTRY). 4. Energy prices in (OUR COUNTRY). 5. The quality of life in (OUR COUNTRY).




























²⁰ See page 7, above.

Consequently citizens in Scandinavia, the Netherlands, Luxembourg, and Austria overwhelmingly believe that their national economic and employment situation is better than the European average. Conversely, views about the national situation are distinctly negative in Hungary, Portugal, Latvia, Lithuania, Greece and Bulgaria.

- ◆ The comparison of the **economic situation** is extremely positive in Luxembourg (88% better; 30% much better) and Denmark (88%; 17% much better).
- ◆ The comparison of the **employment situation** is extremely positive in Denmark (90% better; 31% much better), the Netherlands (83%; 17% much better) and Luxembourg (80%; 22% much better).
- ◆ Conversely, in Hungary, over 9 in 10 citizens believe both the economic and the employment situation are worse in their country than the European average.
- ◆ Candidate countries are also extremely negative with regards to the economic and employment situation, with the worst figures being recorded among respondents in the Former Yugoslavian Republic of Macedonia (85% and 90% respectively).

However, a country-by-country examination of the changes recorded since Spring 2008 reveals improved confidence in the national economic and employment situation vis-à-vis the European average in several Member States, despite the current pessimistic perception.

COMPARISON OF THE NATIONAL SITUATION WITH THE EUROPEAN AVERAGE
CHANGE AUTUMN 2008 – SPRING 2008
TOTAL “BETTER” (percentage points)

The situation of the (NATIONALITY) economy			The employment situation in (OUR COUNTRY)		
	EU27	+1		EU27	-3
	CY	+10		CY	+7
	SI	+10		BG	+5
	FI	+9		SI	+4
	FR	+8		EL	+3
	ES	+5		NL	+3
	SK	+5		IT	+2
	PL	+4			
⋮		⋮	⋮		⋮
	DK	-5		LV	-6
	EE	-6		SE	-6
	UK	-6		UK	-8
	CZ	-7		EE	-11
	MT	-7		LT	-15
	IE	-26		IE	-20

- ◆ The view that the national situation concerning both aspects is better than the European situation gained ground particularly in Cyprus and to a lesser extent in Slovenia. This improved positive attitude to the national situation in comparison to the European Union is also present in the candidate country Turkey²¹.
- ◆ Ireland stands out as being particularly negative about the national situation vis-à-vis the European average concerning both dimensions.

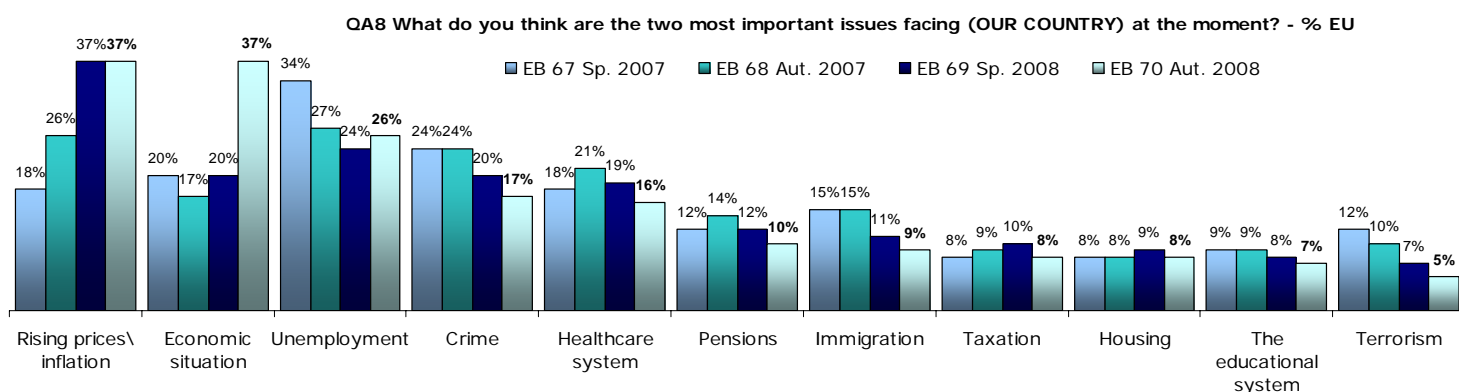
²¹ Turkey: % better in Autumn 2008 and shift since Spring 2008: economic situation 22%; +8; employment situation 15%; +5.

2. CONCERNS OF EUROPEAN CITIZENS

- Inflation and the economic situation are now the main concerns in Europe -

A. National concerns

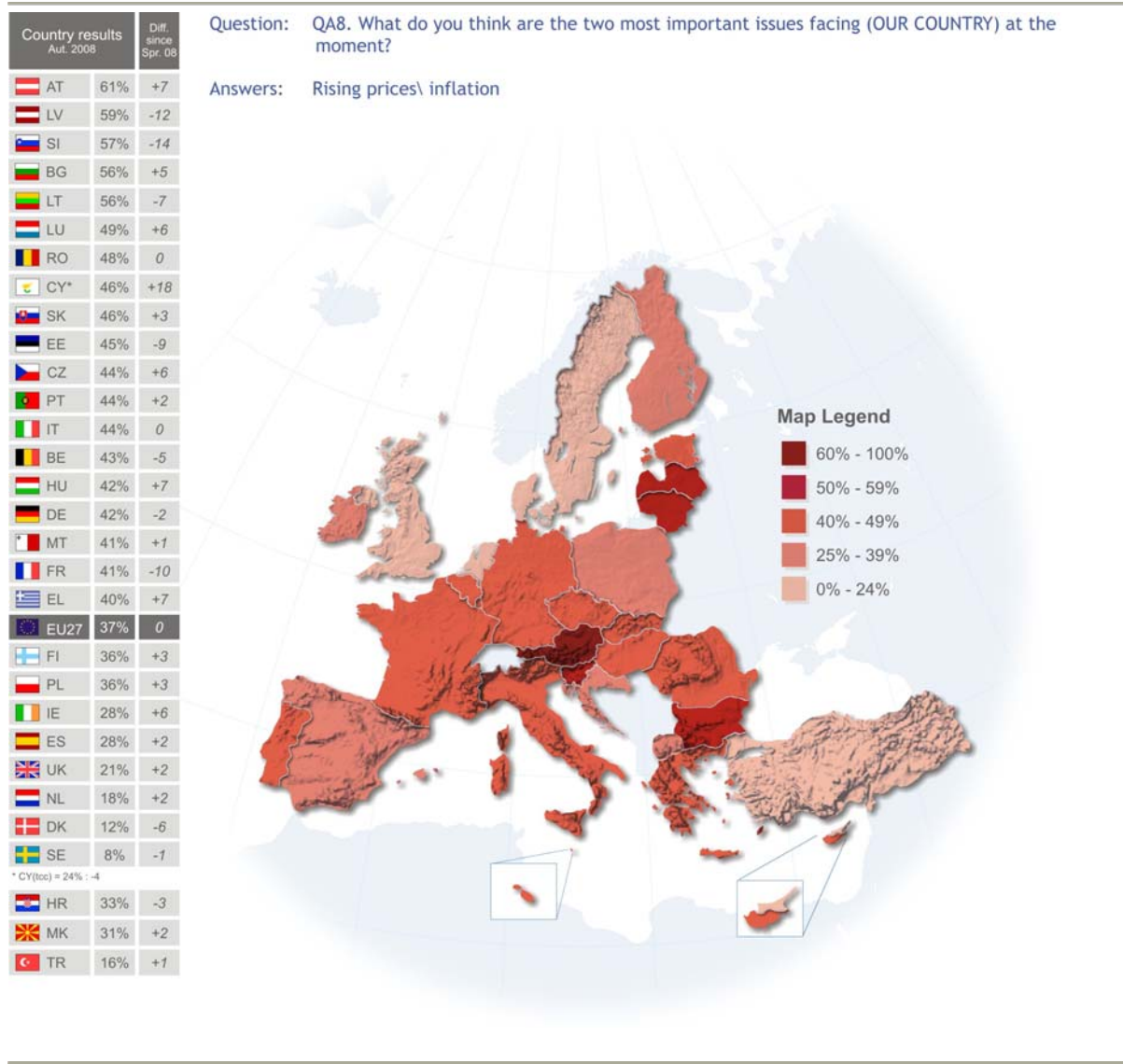
The 'feel-bad' factor described above is also evident from the concerns of Europeans: **in Autumn 2008 rising prices and inflation and the economic situation are the two most frequently mentioned national concerns²².**



The impact of the economic crisis is very apparent in the shift in opinion that has occurred over the past two years. Inflation became the top concern in Spring 2008 and is joined in Autumn 2008 by worries about the economic situation (37% each). These two issues are now the immediate concerns of Europeans, replacing worries about unemployment and crime. The latter issue is now mentioned less frequently. **Compared to six months earlier, the proportion of respondents who mention the economic situation has increased by 17 percentage points; the proportion mentioning inflation, which increased between Autumn 2007 and Spring 2008 by 11 points, remains at this level in Autumn 2008.**

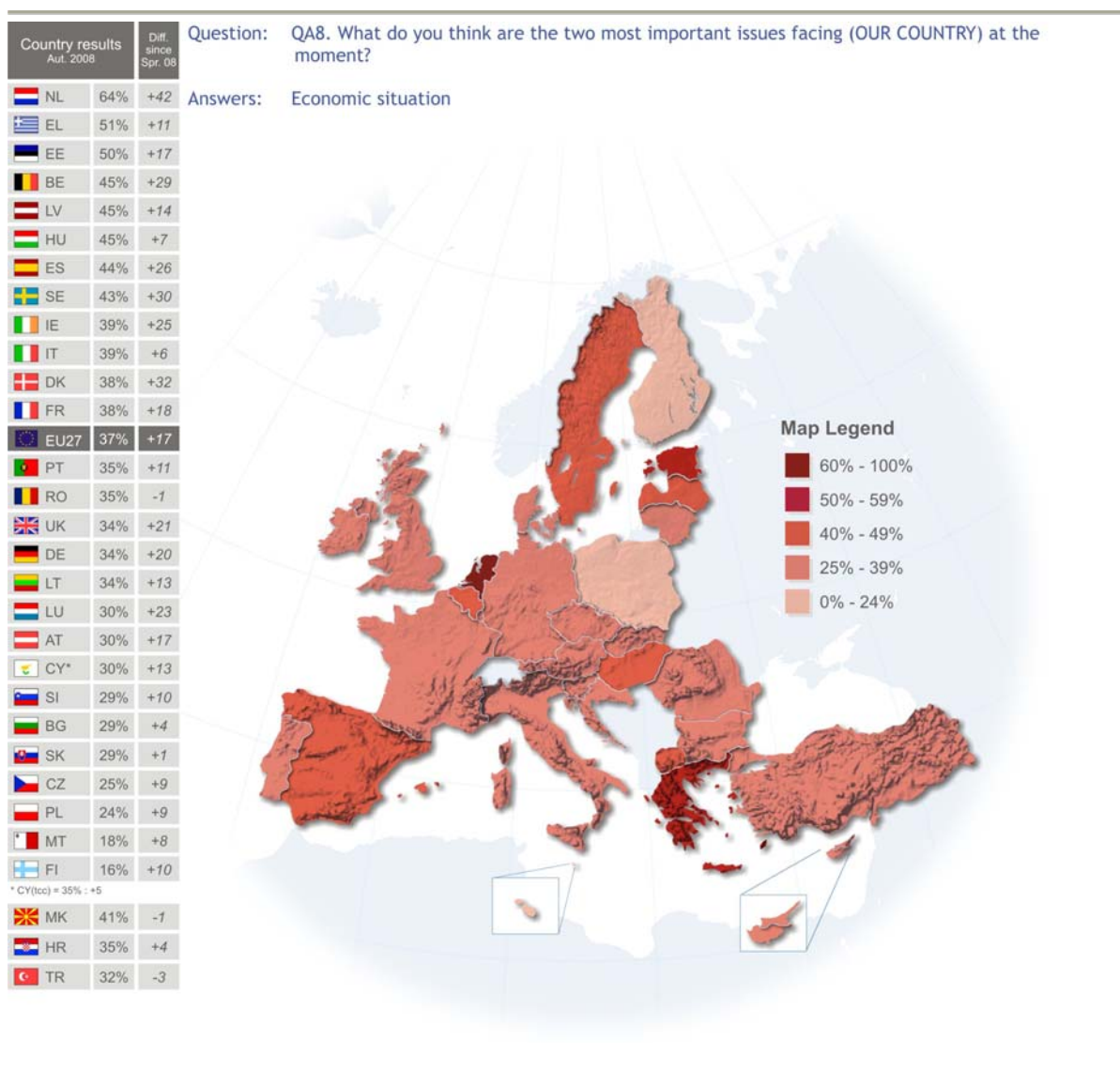
In 15 Member States, **inflation** is seen as the top national concern. In Austria (61%), Latvia (59%), Slovenia (57%), Bulgaria and Lithuania (56% each) this concern is voiced by over half of citizens. Conversely, it is mentioned by less than one-fifth of citizens in Sweden (8%), Denmark (12%) and the Netherlands (18%).

²² QA8a What do you think are the two most important issues facing (OUR COUNTRY) at the moment?



Compared to Spring 2008, the extent to which inflation is now seen as one of the two most important issues has shifted: Cyprus (+18 points) is the only country where increases of 10 percentage points or more are recorded in the proportions who consider “inflation/rising prices” to be an “important issue” at national level. Conversely, drops of 10 percentage points or more have been recorded in Slovenia (-14), Latvia (-12) and France (-10).

The **economic situation** is the top national concern in 9 Member States. The Netherlands tops the list (64%), followed some way behind by Greece (51%) and Estonia (50%). At the bottom of the list we find Finland (16%) and Malta (18%).



Since Spring 2008, increases of 10 percentage points or more in the proportions of those who consider the “**economic situation**” to be an “important issue” at national level are recorded in 19 of the 27 Member States. The largest increases are recorded in the Netherlands (+42 points), followed by Denmark (+32) and Sweden (+30).

In the three candidate countries, neither inflation nor the economic situation tops the list.

Apart from these two issues, we see several country-specific features:

- ◆ **Unemployment**, which ranks third at the European level (26%), is the chief concern in Spain (45%) and the Former Yugoslav Republic of

Macedonia (60%). It is the second most frequently mentioned concern in Portugal (43%), Sweden (38%) and Turkey (51%). Furthermore, increases of 10 percentage points or more have been recorded in Ireland (+19), Sweden, Spain (+18 each) and Latvia (+11).

- ◆ The **healthcare system** is the main concern in Poland (43%) and Finland (39%) and is the second most prominent concern in Ireland (38%), Denmark (36%) and the Czech Republic (28%). It is the fifth concern at the European level, with 16% of mentions.

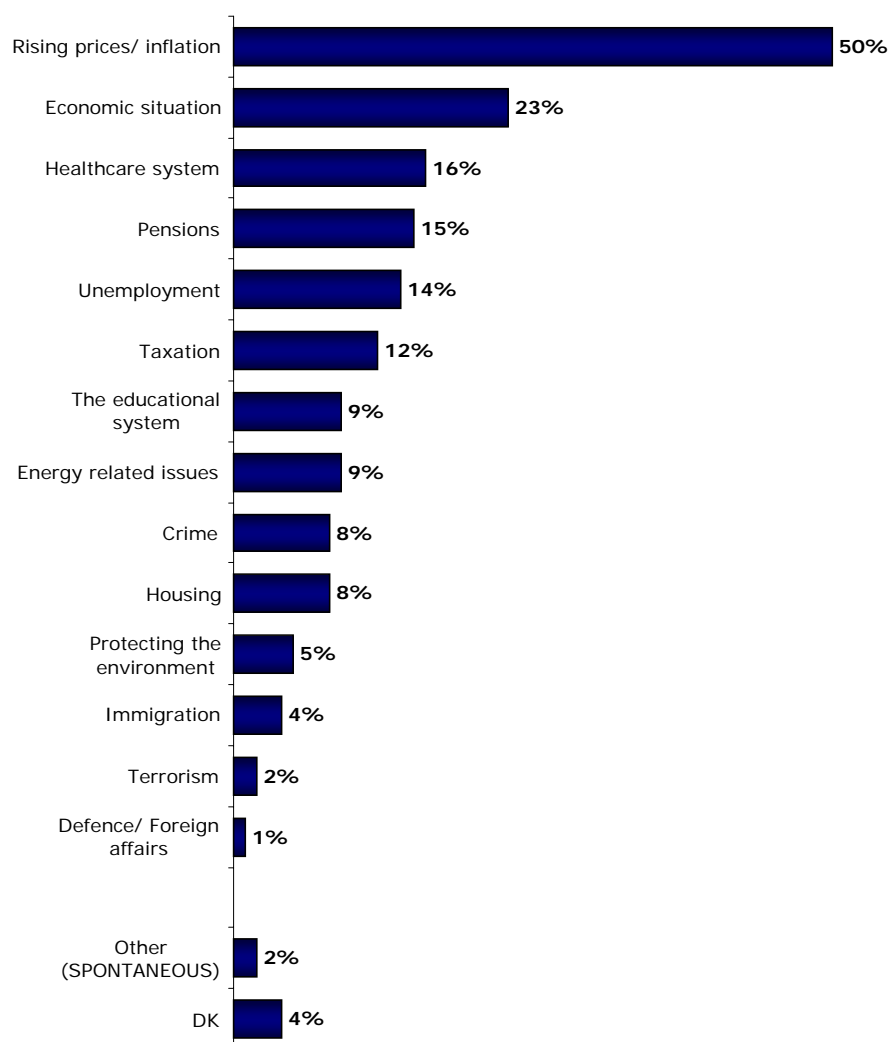
- ◆ Finally a selection of individual cases can be put forward. The perceived threat of **terrorism** now tops the list in Turkey (68%; + 24 points) but has declined strongly in Spain (14%; -17 points). **Immigration** is the top concern in Malta (48%) and is viewed as the third most important issue in the UK (23%). In this latter country, **crime** tops the list of concerns, together with the economic situation (both 34%). Crime also tops the list in Croatia (62%) and is the second most frequently mentioned concern in Bulgaria (30%) and the Netherlands (26%).

B. Personal concerns

For the first time, respondents were subsequently asked to indicate the two most important issues that they personally faced at the moment²³.

The impact of the economic crisis is equally evident in the rank order of perceived personal concerns: rising prices/inflation tops this list (50%), followed – significantly behind - by concerns about the economic situation (23%). Inflation is a direct consequence of the economic situation that directly affects citizens.

QA8b And personally, what are the two most important issues you are facing at the moment? (MAX. 2 ANSWERS) - % EU



Inflation is the primary personal concern in all Member States except the Netherlands and Sweden. In the non Member States it is the primary concern in Croatia and the Former Yugoslav Republic of Macedonia.

²³ QA8b And, personally, what are the two most important issues you are facing at the moment? (NEW QUESTION)

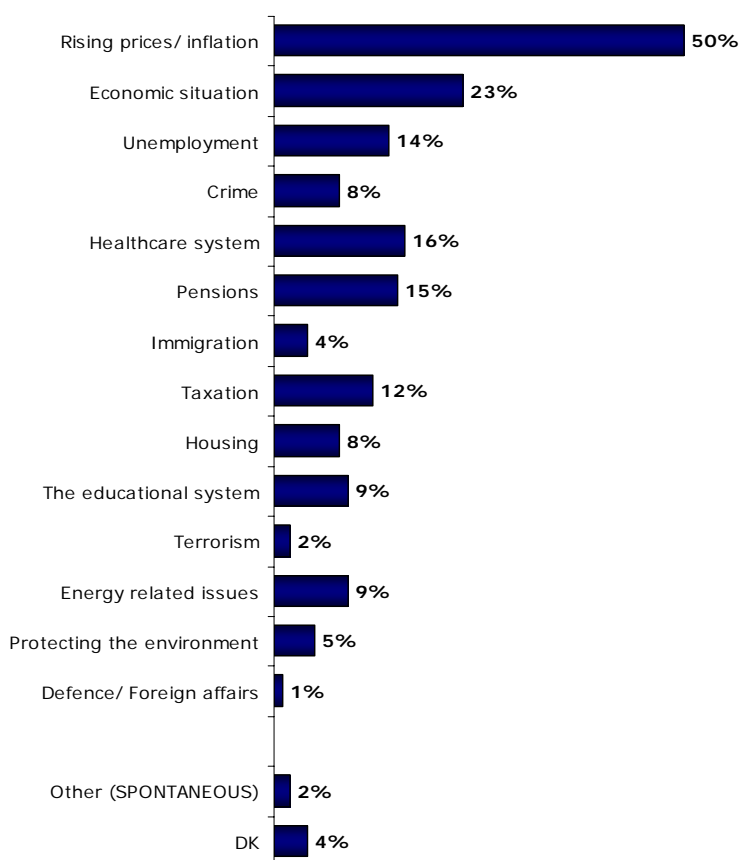
The **economic situation** is the primary concern in Sweden (32%) and Turkey (48%). It is the second most frequently mentioned issue in 19 Member States as well as in Croatia and the Former Yugoslav Republic of Macedonia.

The Netherlands is the only country, where the **healthcare system** ranks highest in the minds of citizens (32%).

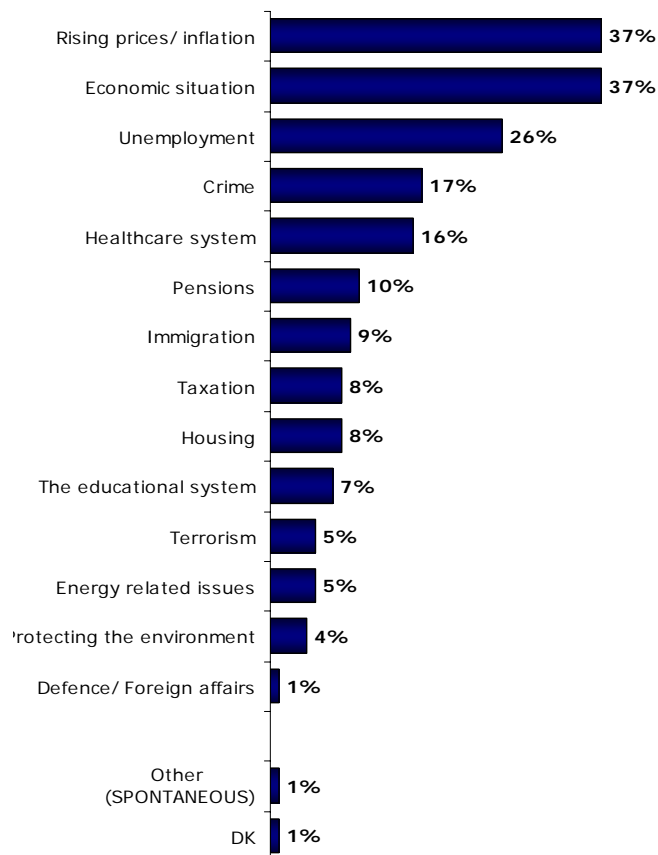
Outside these issues, the following concerns rank second at the national level:

- ◆ The **healthcare system** in the Czech Republic, Germany, Poland, Slovakia, Finland and Sweden.
- ◆ **Pensions** in Bulgaria, Hungary, Austria and Slovenia. In Austria (18%) and in Hungary (22%), this issue is mentioned as often as the economic situation .
- ◆ Concerns about the **education system** are mentioned by 28% of Dutch respondents, who mentioned concerns about the economic situation and inflation equally frequently.
- ◆ Finally, concerns about **energy-related issues** represent the second most mentioned personal concern in Malta (31%).

QA8b And personally, what are the two most important issues you are facing at the moment? (MAX. 2 ANSWERS)
- % EU



QA8a What do you think are the two most important issues facing (OUR COUNTRY) at the moment? (MAX. 2 ANSWERS)
- % EU



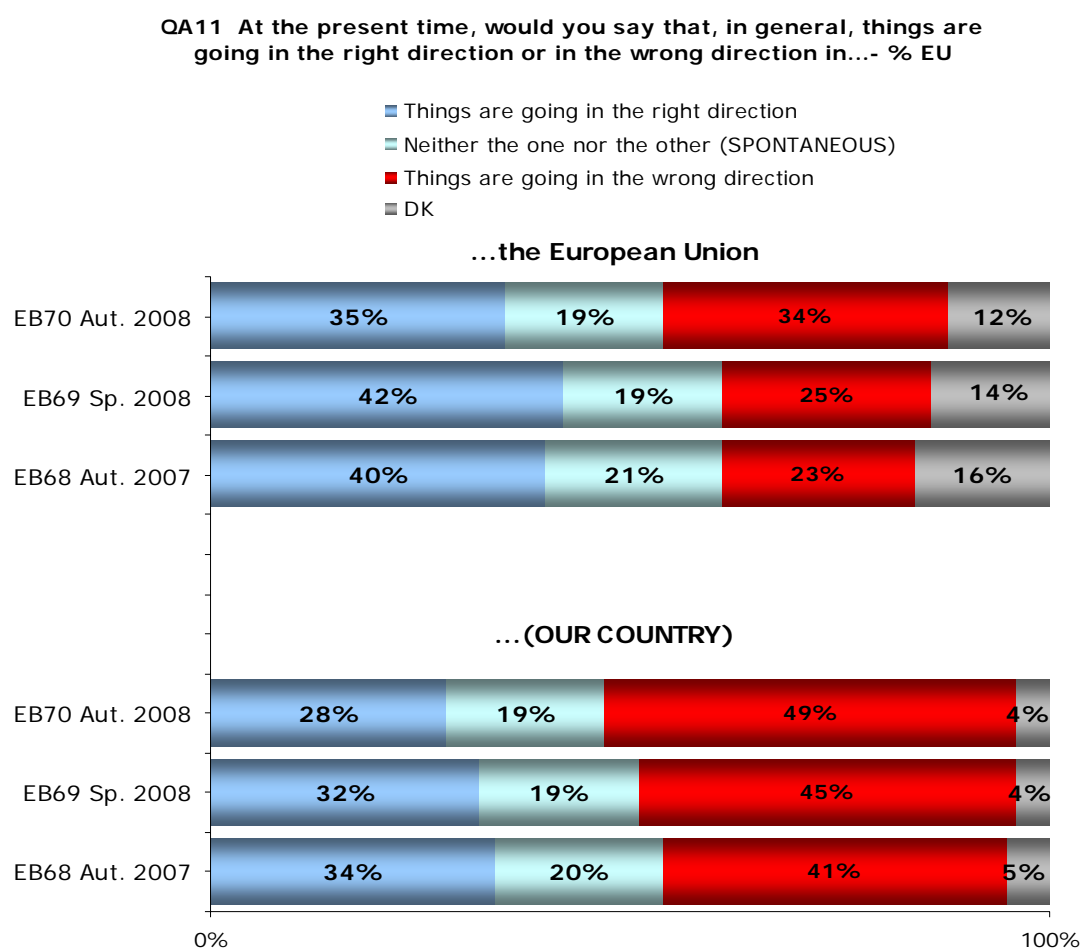
A comparison of national and personal concerns confirms the predominance of economic factors in the respondents' answers. The issue of inflation is mentioned more often as a personal concern (50%) than as a national concern (37%): inflation is perceived by far as the most important problem that respondents face personally because it impacts directly on their daily lives. The economic situation ranks second in the hierarchy of European citizens' personal concerns, but it is seen more as an issue faced by the country than by citizens themselves (37% vs. 23%). Unemployment is also seen as more of a national (26%) than a personal problem (14%). Conversely, quite logically, several "social and societal" items are slightly more often cited at personal level than at country level: pensions (15% vs. 10%), taxation (12% vs. 8%) the educational system (9% vs. 7%) and energy related issues (9% vs. 5%): these issues directly affect the personal lives and more so, the financial situation of the interviewees.

For further information on national results, the reader is invited to consult the full data tables that are annexed to this report.

3. DIRECTION IN WHICH THINGS ARE GOING

- Europeans have a negative opinion of the direction of national developments and have doubts about the direction taken by the EU -

Concerns about the economic situation are also visible in how Europeans perceive things to be going both at the national level and in the European Union as a whole²⁴. **Nearly one European citizen in two feels that at the present time things are going in the wrong direction** in their country (49%; +4 percentage points).












































Opinions about the direction in which the European Union is going are now divided, with 35% saying things are moving in the right direction and 34% feeling that things are going in the wrong direction. This compares starkly with Spring 2008, when respondents who felt that things were moving in the right direction were still clearly in the majority.

²⁴ QA11 At the present time, would you say that, in general, things are going in the right direction or in the wrong direction, in...? 1. (OUR COUNTRY); 2. The European Union

It therefore appears that Europeans are now directly connecting the national and European-wide economic crisis to how things are going in their country and in the European Union as a whole.

QA11 At the present time, would you say that, in general, things are going in the right direction or in the wrong direction, in...?

(OUR COUNTRY)				The European Union			
		Things are going in the right direction (+/- Spring 2008 in brackets)	Things are going in the wrong direction (+/- Spring 2008 in brackets)			Things are going in the right direction (+/- Spring 2008 in brackets)	Things are going in the wrong direction (+/- Spring 2008 in brackets)
	EU27	28% (-4)	49% (+4)		EU27	35% (-7)	34% (+9)
	SI	49% (+7)	25% (-7)		RO	57% (-4)	10% (+4)
	SE	47% (-1)	35% (+1)		BG	55% (+1)	7% (+1)
	DK	44% (-4)	48% (+6)		EE	53% (-7)	14% (+5)
	EE	42% (-9)	34% (+8)		PL	53% (-10)	14% (+5)
	NL	42% (+7)	25% (-10)		SI	53% (-6)	19% (+5)
	SK	42% (+1)	21% (+2)		SK	48% (-5)	14% (+9)
	LU	41% (-1)	35% (+5)		CZ	47% (-3)	24% (+8)
	PL	41% (-14)	37% (+13)		NL	45% (-1)	23% (+1)
	RO	39% (-14)	34% (+16)		SE	45% (-3)	28% (+3)
	DE	38% (+4)	37% (-3)		DE	41% (+4)	31% (+3)
:	:	:	:	:	:	:	:
	PT	23% (-3)	41% (+3)		LT	30% (-22)	39% (+26)
	BG	23% (-5)	42% (+2)		FI	30% (-11)	54% (+14)
	UK	23% (-2)	63% (-)		PT	29% (-12)	26% (+5)
	LV	19% (-2)	61% (+8)		HU	29% (-8)	31% (+12)
	LT	19% (-17)	65% (+19)		ES	29% (-19)	37% (+20)
	EL	18% (-7)	69% (+13)		FR	29% (-5)	51% (+13)
	IT	15% (+6)	50% (-11)		AT	26% (-1)	44% (+6)
	IE	15% (-25)	60% (+24)		UK	26% (-8)	47% (+12)
	HU	8% (+4)	74% (-5)		IE	21% (-25)	35% (+19)
					IT	20% (-6)	39% (+9)

Figures in bold=majority view in the country

The results at country level can be summarised as follows:

- ◆ Regarding the direction of developments at national level, there are now only 9 Member States where the majority view is that things are moving in the right direction, whereas in Spring 2008 the balance was evenly split (in 14 Member States people felt that things were going in the right direction against 13 countries where the opposite view was more widely held).
- ◆ The balance is quite evenly split regarding the European Union: in 14 Member States the majority view is that things are going in the right direction, against 13 Member States where the majority view is the opposite. In Spring 2008, a more consistent picture existed, with 23 Member States where a majority of respondents felt that things were moving in the right direction in the European Union.

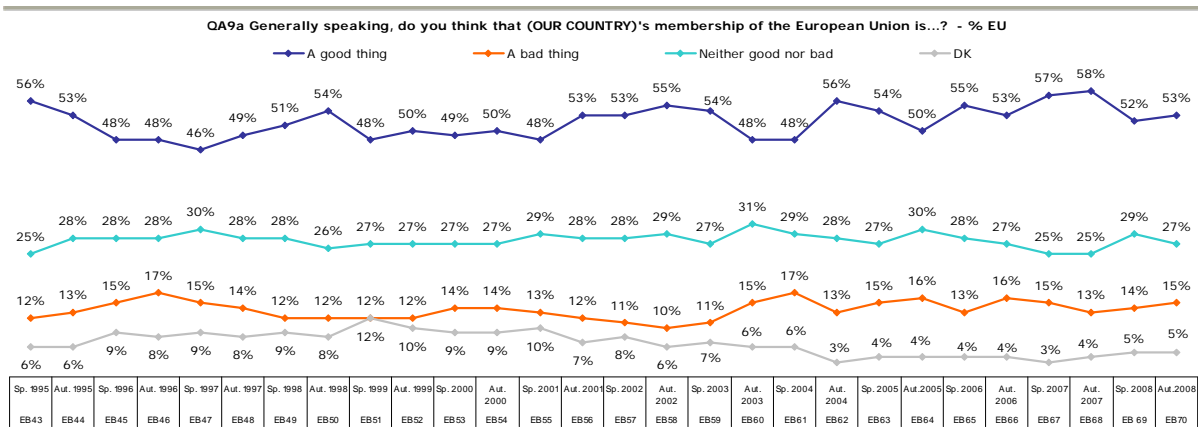
- ◆ The strongest support for the view that things are going in the right direction in their country is found in Slovenia and Sweden. Conversely, the highest disagreement figures are found in Hungary and Greece, where around 7 in 10 people feel that things are going in the wrong direction in their country.
- ◆ When it comes to the direction in which things are going in the European Union, we find 7 newer members of the EU at the top of the list, with the two newest members – Bulgaria and Romania – most likely to think that things are going in the right direction in the EU. Citizens in Italy, Ireland, Austria and the United Kingdom are least satisfied with the course of things in the EU.
- ◆ Positive developments since Spring 2008 are noted in the Netherlands, Slovenia, Italy, Hungary and Germany with regard to the direction in which things are going at the national level. In the candidate country Turkey, the mood is also more positive than in Spring 2008. Conversely, there are 9 countries out of the 27 Member states, and Croatia, where negative shifts of 10 points or more (decrease in percentage of answer 'right direction') have been recorded since Spring 2008 with Ireland standing out in particular.
- ◆ When it comes to the direction in which things are going in the EU, we find no countries where the development since Spring 2008 is entirely positive. There are 10 Member States where negative shifts in the form of a decrease of 10 points or more of the proportion of respondents who consider that things are going in the right direction have been recorded since Spring 2008. In Ireland, Lithuania and Spain, the shift is particularly negative.

4. SUPPORT FOR MEMBERSHIP OF THE EUROPEAN UNION

- Support for EU membership stabilises -

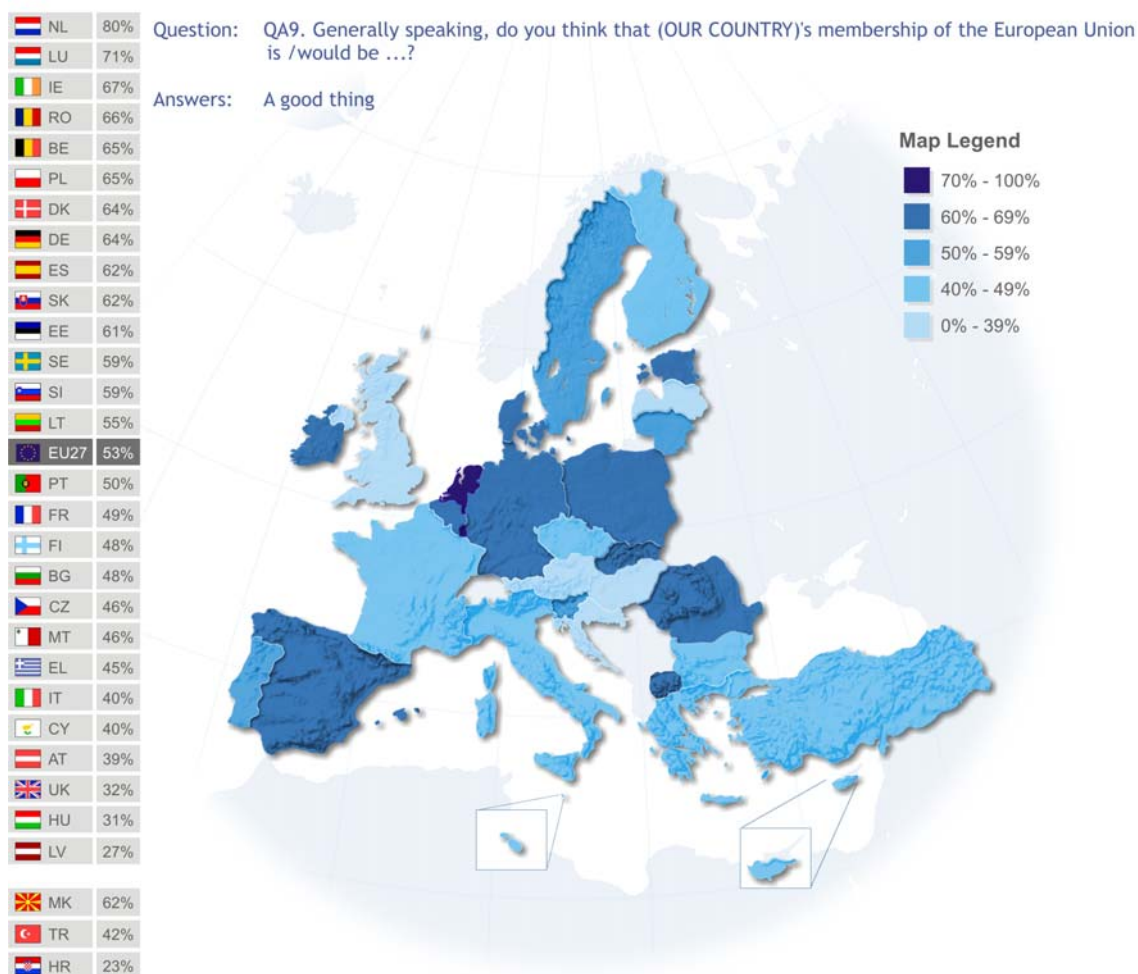
The decline in positive views on membership of the EU noted in Spring 2008 has stabilised²⁵. Overall, the year 2008 sees a return to a more familiar picture, following on from the record high results witnessed in 2007. While all the indicators related to the economy are declining, membership of the European Union is still seen as a good thing by an absolute majority of Europeans. Moreover, this proportion has increased very slightly.

Support for the European Union still constitutes the majority view (53%; +1 point), whilst only 15% of Europeans consider their country's membership as a bad thing (+1).



In 25 of the 27 Member States, the majority view is positive, particularly in the Netherlands where 8 in 10 citizens see their country's EU membership as a good thing.








²⁵ QA9 Generally speaking, do you think that (OUR COUNTRY)'s membership of the European Union is...?



A neutral stance toward membership is voiced in Latvia (49%) and Hungary (45%), while citizens in Greece, Austria, Italy and Cyprus are more equally divided between positive views and neutrality. Citizens in the UK are divided between positive, neutral and negative views. This represents an improvement since Spring 2008, when the majority view was negative.

In the group of candidate countries, support for potential membership has weakened. Respondents in the Former Yugoslav Republic of Macedonia continue to be most positive about their country's potential membership (62% 'a good thing'; -10 points), ahead of those from Turkey (42%; -7) and Croatia, where the majority view now is that potential membership would be a bad thing (38%; +13).

QA9a Generally speaking, do you think that (OUR COUNTRY)'s membership of the European Union is...?





% A good thing		Autumn 2008 (EB70)	Change Autumn 2008 - Spring 2008
	EU27	53%	+1
	NL	80%	+5
	LU	71%	-2
	IE	67%	-6
	:	:	:
	UK	32%	+2
	HU	31%	-1
	LV	27%	-2

The stable situation noted at EU level mirrors the developments in most individual Member States. There are only a few countries where public opinion has shifted considerably since Spring 2008:

- ◆ Positive changes of 5 or more percentage points in opinions regarding EU membership are found in only four countries: Slovenia (+7 points for 'a good thing'), the Netherlands, Slovakia and Sweden (all +5). As we have previously seen, citizens in these countries are among the least pessimistic about the current (economic) situation (see chapter 1).
- ◆ Significant drops of 6 or more percentage points in support for EU membership are registered in Malta (-14), Cyprus (-12) and Ireland (-6). Malta and Cyprus recorded large increases in support between Autumn 2007 and Spring 2008. In Spring 2008, citizens in these two countries generally had a far more positive outlook on the economic situation than average but in Autumn 2008 this optimism has vanished. Ireland stands out as the country where in many regards the mood in Autumn 2008 is the most pessimistic.

Overall, irrespective of the 'economic feel bad factor', the attitude towards Membership has remained stable even though some exceptions at country level can be noted. At the same time, the analysis by socio-demographic category reveals that traditional factors such as age, education and employment status continue to retain their impact on support for EU membership.

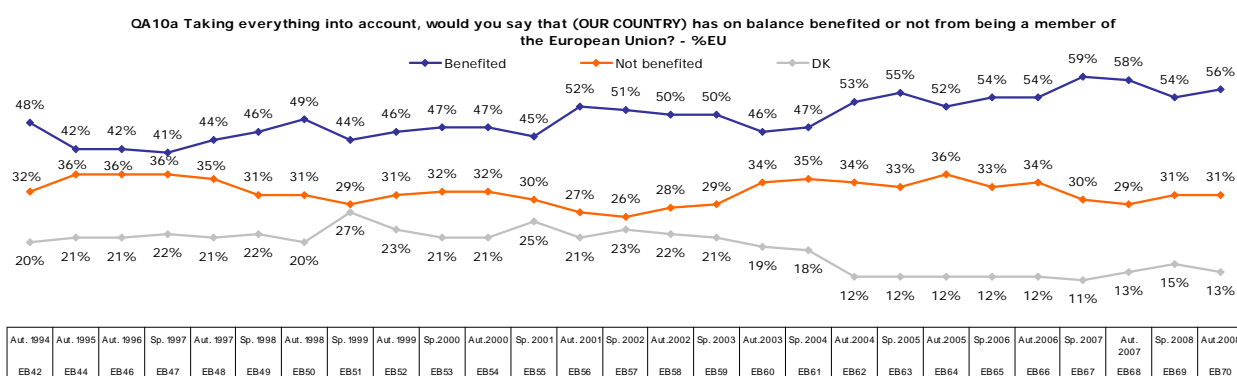
QA9a Generally speaking, do you think that (OUR COUNTRY)'s membership of the European Union is...?

	A good thing	Neither good nor bad	A bad thing	DK
EU27	53%	27%	15%	5%
Sex				
 Male	57%	24%	16%	3%
Female	49%	30%	15%	6%
Age				
 15-24	62%	26%	8%	4%
25-39	55%	28%	13%	4%
40-54	53%	27%	17%	3%
55 +	47%	28%	19%	6%
Education (End of)				
 15-	39%	30%	23%	8%
16-19	50%	31%	15%	4%
20+	66%	21%	11%	2%
Still Studying	70%	20%	6%	4%
Respondent occupation scale				
 Self-employed	57%	26%	14%	3%
Managers	66%	21%	12%	1%
Other white collars	58%	27%	11%	4%
Manual workers	49%	30%	17%	4%
House persons	42%	30%	18%	10%
Unemployed	43%	33%	17%	7%
Retired	46%	28%	20%	6%
Students	70%	20%	6%	4%
Objective knowledge of the EU				
Bad	33%	32%	19%	16%
Average	51%	30%	16%	3%
Good	62%	23%	13%	2%

5. THE BENEFITS OF MEMBERSHIP OF THE EUROPEAN UNION

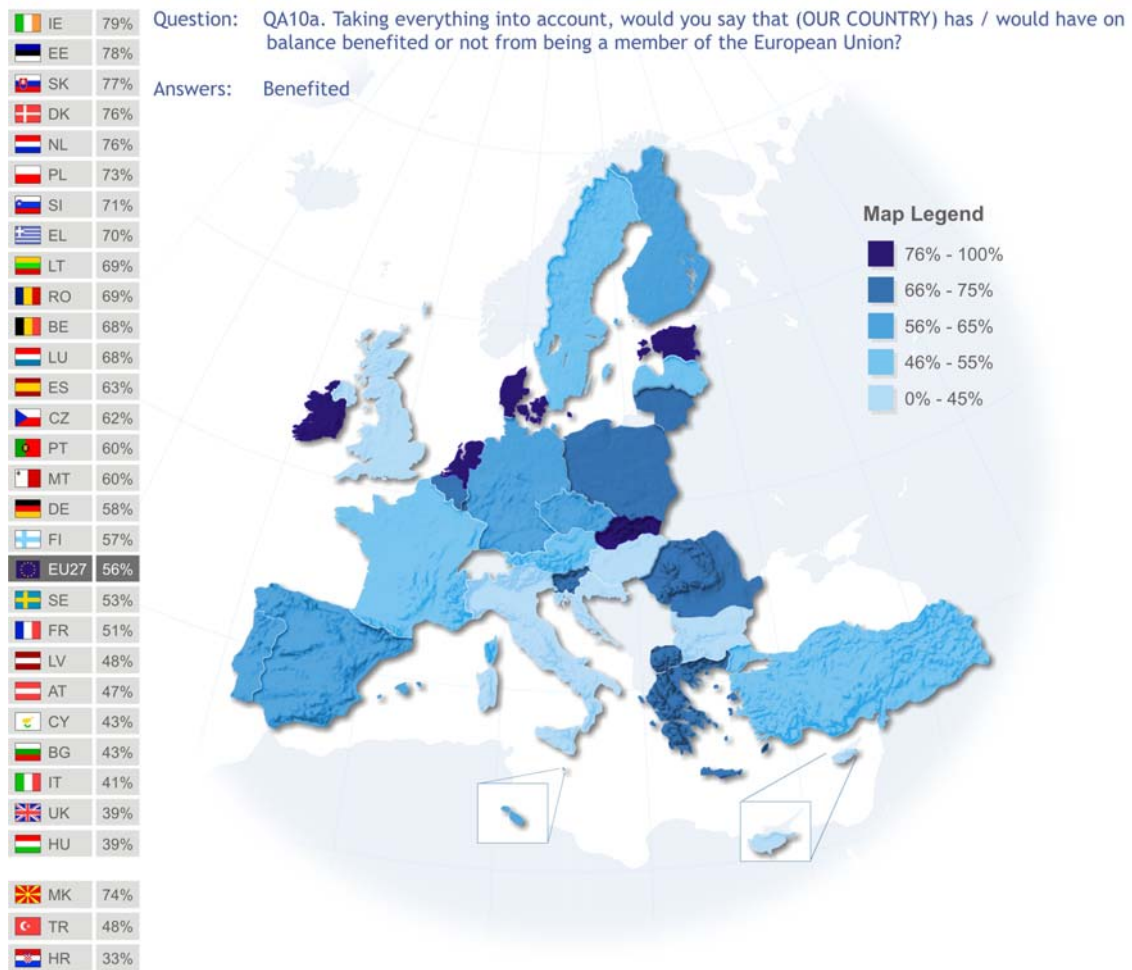
- A similar trend is observed for the perceived benefits of membership as for membership in general –

Perceptions of the benefits of EU membership in general mirror opinions on EU membership in general: **a majority of Europeans think that their country has on balance profited from membership (56%, +2 points) and the decline noted in Spring 2008 has come to a halt²⁶**. As in Spring 2008, around a third of respondents (31%) feel that their country has not benefited from EU membership.



The majority view in nearly all Member States is that EU membership has on balance been beneficial. Exceptions to this are Hungary (51% 'not benefited'), the United Kingdom and Cyprus (46% each) where the highest proportions think that the negative aspects of membership outnumber the benefits.












²⁶ QA10 Taking everything into account, would you say that (OUR COUNTRY) has on balance benefited or not from being a member of the European Union?



Highly positive views are held by three-quarters or more of Irish, Estonian, Slovakian, Danish and Dutch respondents.

Among the candidate countries, opinions are still positive although the intensity is less pronounced than in Spring 2008. There are large differences among these three countries with positive views ranging from 74% of respondents in the Former Yugoslav Republic of Macedonia (-8 points) to 33% of Croatians (-11 points) who believe in the positive benefits of possible *future* membership.

Again, the stable situation noted at EU level mirrors the developments in most individual Member States with relatively few significant shifts noted since Spring 2008.

BENEFITS OF MEMBERSHIP			
% Has benefited		Autumn 2008 (EB70)	Change Autumn 2008 - Spring 2008
	EU27	56%	+2
	AT	47%	+11
	NL	76%	+6
	FI	57%	+6
	RO	69%	+4
	IT	41%	+4
	⋮	⋮	⋮
	PL	73%	-4
	BG	43%	-4
	LT	69%	-6
	MT	60%	-9
	CY	43%	-12

- ◆ The largest positive change in opinions regarding the benefits of EU membership is found in Austria (+11 'benefited'), followed by the Netherlands and Finland (+6 each).
- ◆ The most significant drops in 'has benefited' levels are registered in Cyprus (-12), Malta (-9) and Lithuania (-6).
- ◆ On both dimensions – assessment and perceived benefits of the Membership - Ireland is one of the top countries. Yet, it shows negative evolutions on both dimensions over time.

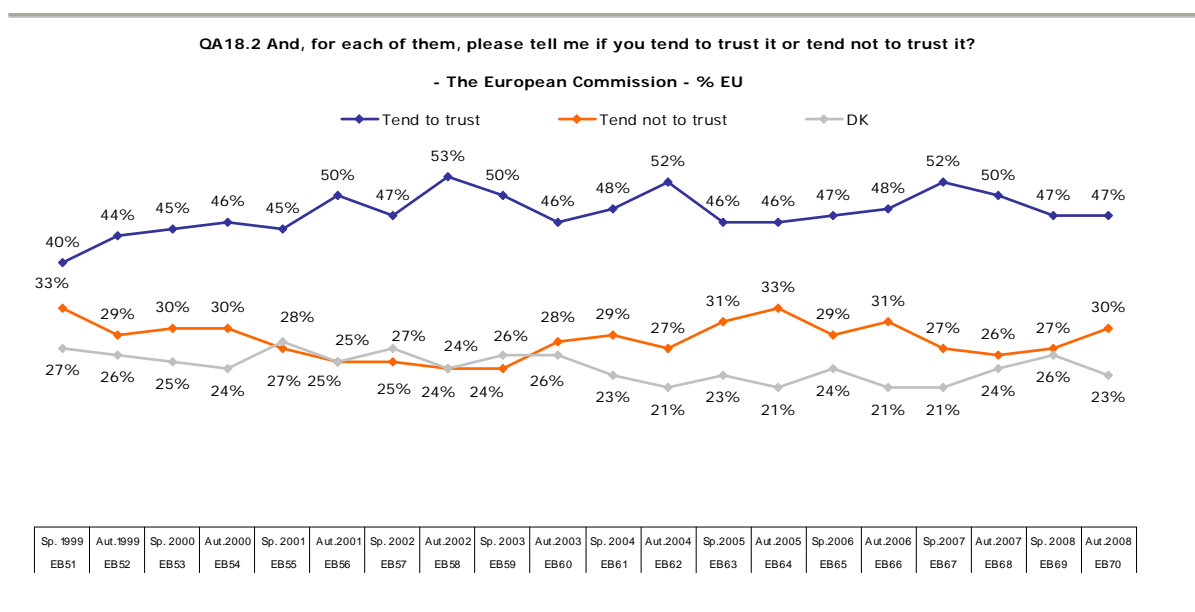
It must be noted that in Autumn 2008, the division of countries by positive and negative trends does not necessarily reflect the economic outlook in these countries although some countries show a correlation.

6. PERCEPTION OF EUROPEAN INSTITUTIONS

After looking at attitudes to the European Union as a whole, we now move on to examine trust linked to the European institutions: the European Commission, the European Parliament and the European Central Bank. In Spring 2008, trust in the political institutions was declining compared to Autumn 2007 (-3 points, both for the European Commission and the European Parliament), while trust in the ECB was increasing slightly (+3 points). We may wonder whether, with the undeniable deterioration of the economic situation, the trust that Europeans have in these institutions will decrease, or whether instead they will rely on them more, as a possible defence against the crisis.

- *Trust in the European institutions remains fairly stable but the tendency not to trust them increases –*

A. The European Commission

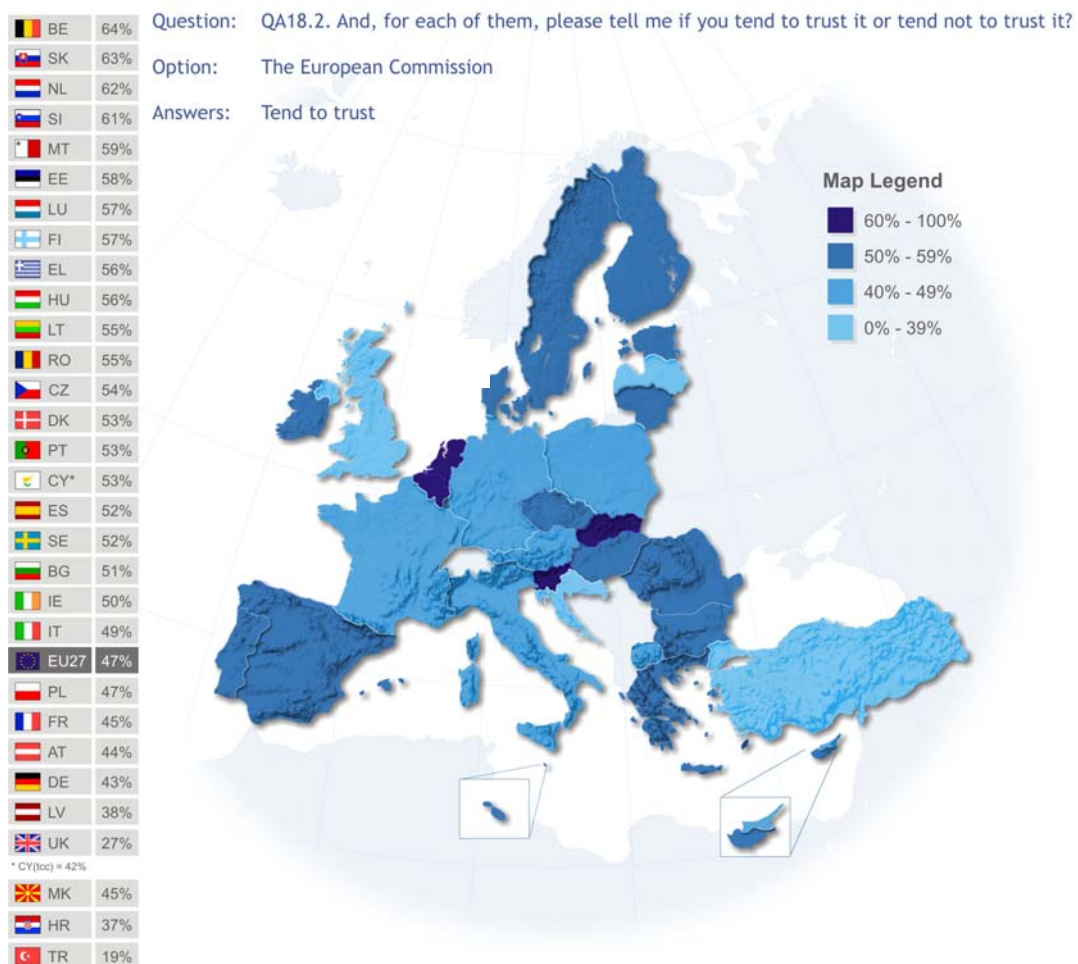


In this most recent poll, trust in the European Commission stands at 47%, thus staying at the same level as in Spring 2008²⁷. However, the proportion of respondents tending not to trust the Commission has increased (30%; +3 points). The rise in 'don't know' rates noted in recent years has been reversed in Autumn 2008 (23%; -3 points).

²⁷ QA18 And, for each of them, please tell me if you tend to trust it or tend not to trust it? 2. The European Commission

The majority view in 26 of the 27 Member States is favourable concerning the trustworthiness of the European Commission.

At least six in ten respondents in Belgium, Slovakia, the Netherlands and Slovenia confirm their trust in the Commission.


















The UK is now the only Member State where those not trusting the European Commission outnumber those who say they do (45% not trust vs. 27% trust). Unlike in Spring 2008, this is now no longer the case in Austria (41% not trust vs. 44% trust).

As in Spring 2008, the Former Yugoslav Republic of Macedonia is the only candidate country where respondents are more likely to trust than distrust the European Commission (45% vs. 29%). In Turkey (43% not trust vs. 19% trust) and in Croatia (42% vs. 37%), those not trusting the European Commission outnumber those who say they do.

While in Spring 2008 there were 18 Member States and 2 candidate countries where falls in the proportion tending to trust were observed, the development in Autumn 2008 is far more positive: in 8 Member States the trustworthiness of the European Commission has improved of more than 2 percentage points, against only 6 where public opinion is now more negative.

We see that in several of the countries which recorded a negative development in the last survey, positive shifts are recorded this time. This applies particularly to Austria (+7 points) and Romania (+5 points).

Nevertheless, in Ireland (-4 points) and Poland (-7 points) further drops in trust levels are observed. The most considerable falls are registered in Cyprus (-10 points) which saw the largest increase in trust levels between Autumn 2007 and Spring 2008.

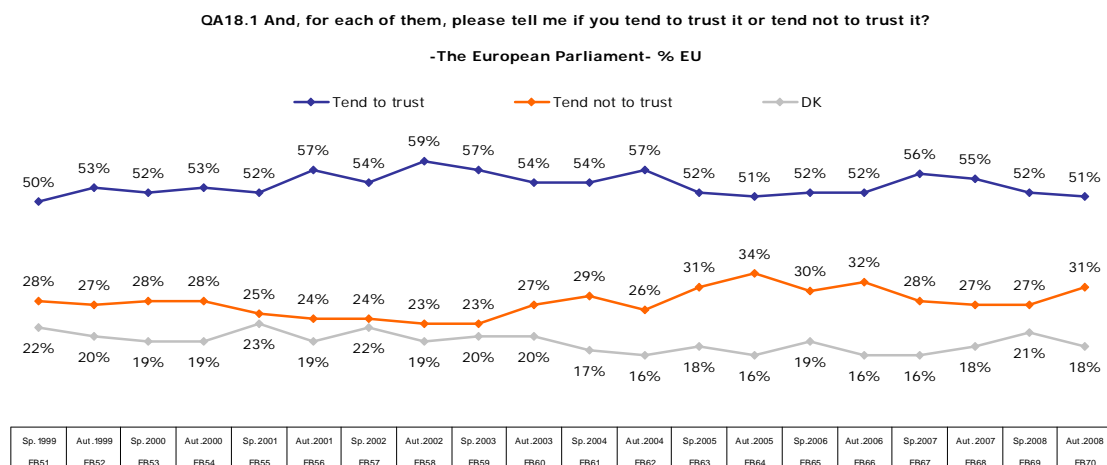
TRUST IN THE EUROPEAN COMMISSION			
% Tend to trust		Autumn 2008 (EB70)	Change Autumn 2008 - Spring 2008
	EU27	47%	0
	AT	44%	+7
	RO	55%	+5
	FI	57%	+4
	LT	55%	+4
	SI	61%	+3
	LU	57%	+3
	CZ	54%	+3
	UK	27%	+3
	⋮	⋮	⋮
	IE	50%	-4
	BE	64%	-5
	ES	52%	-6
	PL	47%	-7
	PT	53%	-9
	CY	53%	-10

Finally, in socio-demographic terms, a European who trusts the European Commission is more likely to...

- ◆ ...be male (50% positive) than female (44%);
- ◆ ...be young (aged 15-24: 50%) than to belong to the oldest age group (aged 55+: 43%);
- ◆ ...have spent a longer time in education (aged 20+ when finished education: 57%) than have left school earlier (aged 15-: 36%).

B. The European Parliament

A nearly identical pattern to that seen for trust in the European Commission is registered for trust in the European Parliament: the proportion saying they tend to trust the European Parliament now stands at 51% (-1 point) whereas the proportion saying they tend not to trust it has increased to 31% (+4 points)²⁸.

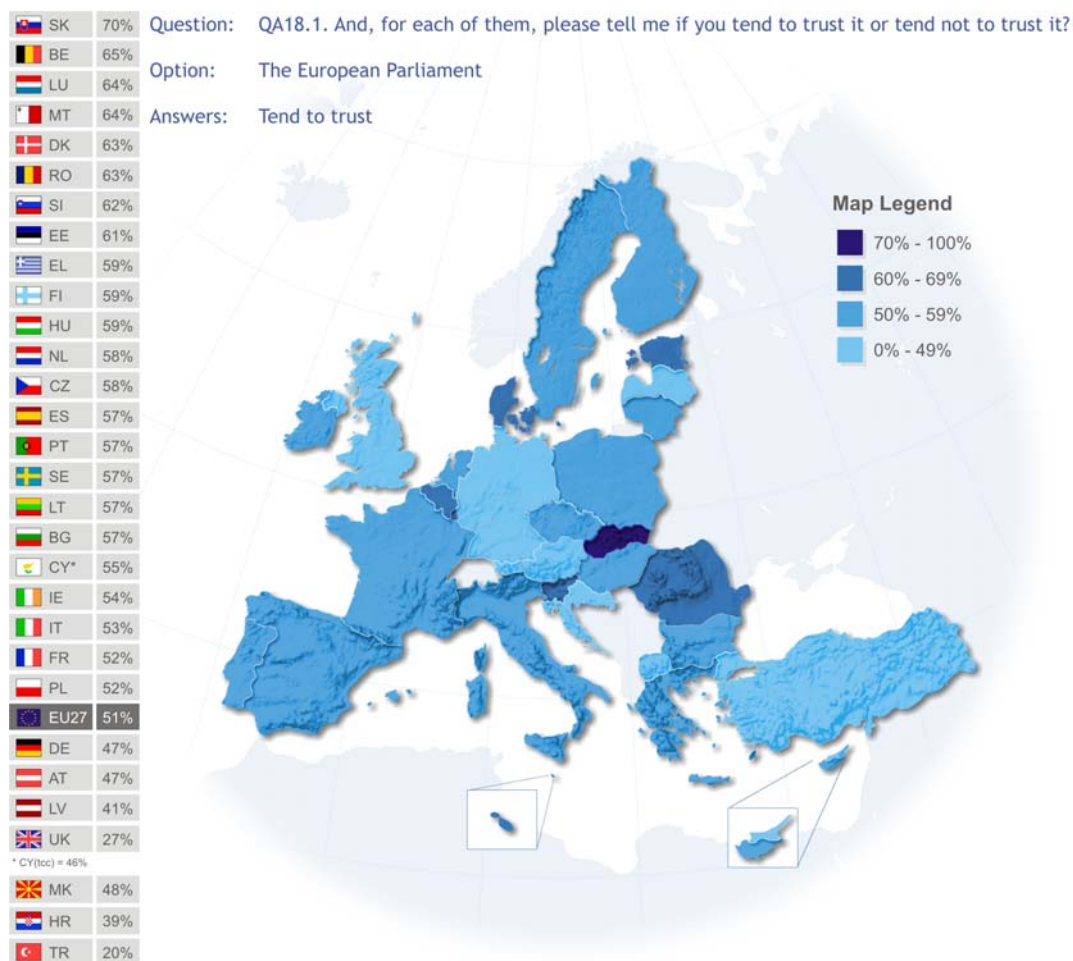


As was the case for the European Commission, the increase in lack of trust has been translated into a fall in the 'don't know' rate in Autumn 2008 (18%; -3 points).

²⁸ QA18 And, for each of them, please tell me if you tend to trust it or tend not to trust it? 1. The European Parliament

Country results are largely a projection of those seen for the European Commission. Trust in the European Parliament is the majority view in all except one Member State, namely the UK.

As was the case for the Commission, trust levels are highest in Slovakia (70%) and Belgium (65%). However, the number of countries where around three in five respondents trust the European Parliament rises to 8, compared to 4 for the European Commission.
















The UK (51% not trust vs. 27% trust) again provides the counter example, with more respondents distrusting the European Parliament than having trust in it.

This is also the case in the candidate country Turkey (42% vs. 20%). In Croatia people are divided (41% vs. 39%) while in the Former Yugoslav Republic of Macedonia a relative majority trust the European Parliament (48%).

In addition to the present results, the changes since Spring 2008 are similar to those seen for the European Commission. In the countries where an increase in the proportion of those who trust the European Parliament was registered between Autumn 2007 and Spring 2008, we now find lower trust levels, namely in Cyprus, Portugal and Belgium. Conversely, in Austria and Estonia, trust levels have now improved after falls were recorded.

Furthermore, in Ireland (-8) but not in Poland (-1) further significant falls in trust levels are observed.

The largest improvements are registered in Luxembourg and Finland (both +5), two countries where trust in the European Commission also improved.

TRUST IN THE EUROPEAN PARLIAMENT			
% Tend to trust		Autumn 2008 (EB70)	Change Autumn 2008 – Spring 2008
	EU27	51%	-1
	LU	64%	+5
	FI	59%	+5
	AT	47%	+4
	MT	64%	+3
	EE	61%	+3
	⋮	⋮	⋮
	DE	47%	-3
	NL	58%	-4
	ES	57%	-5
	BE	65%	-6
	IE	54%	-8
	PT	57%	-9
	CY	55%	-10

The development in the candidate countries is generally negative²⁹.

Finally, in socio-demographic terms, a European who trusts the European Parliament is more likely to...

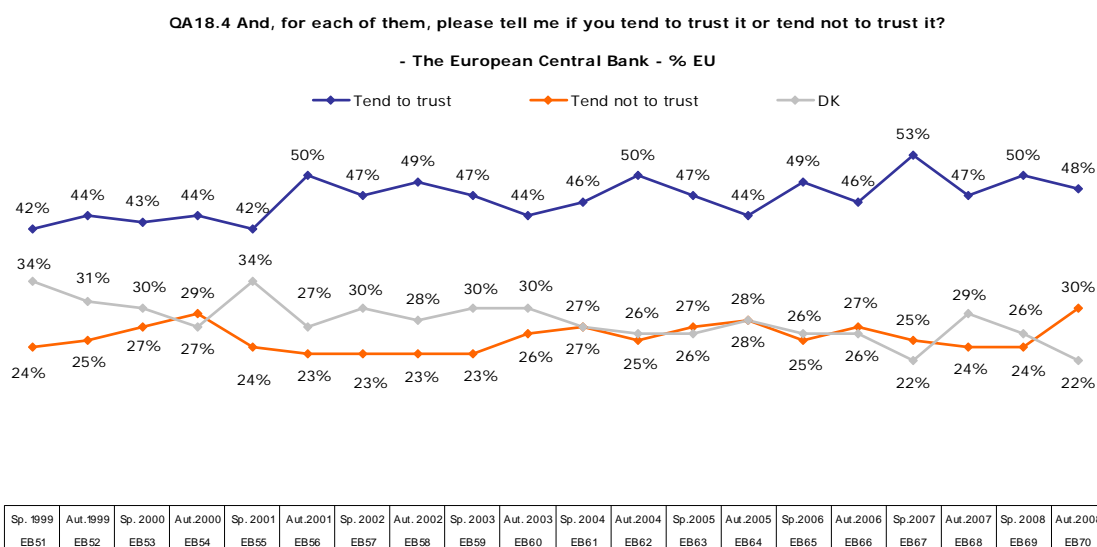
- ◆ ...be male (53% positive) than female (49%);
- ◆ ...be young (aged 15-24: 55%) than to belong to the oldest age group (aged 55+: 48%);
- ◆ ...have spent a longer time in education (aged 20+ when finished education: 60%) than have left school earlier (aged 15-: 40%).

²⁹ Percentage point shifts in % tend to trust = -6 in the Former Yugoslav Republic of Macedonia; -5 in Turkey and -1 in Croatia.

C. The European Central Bank

The last European body for which we examine trust levels is the European Central Bank (ECB). As the body which decides monetary policy in the euro area, the ECB has made more headlines than ever before during the current financial crisis.

In this adverse economic climate, where consumer confidence has vanished, we find a slight decline in trust in the ECB: the proportion saying they tend to trust the ECB now stands at 48% (-2 points) whereas the proportion saying they tend not to trust it has increased to 30% (+6 points)³⁰ since Spring 2008.



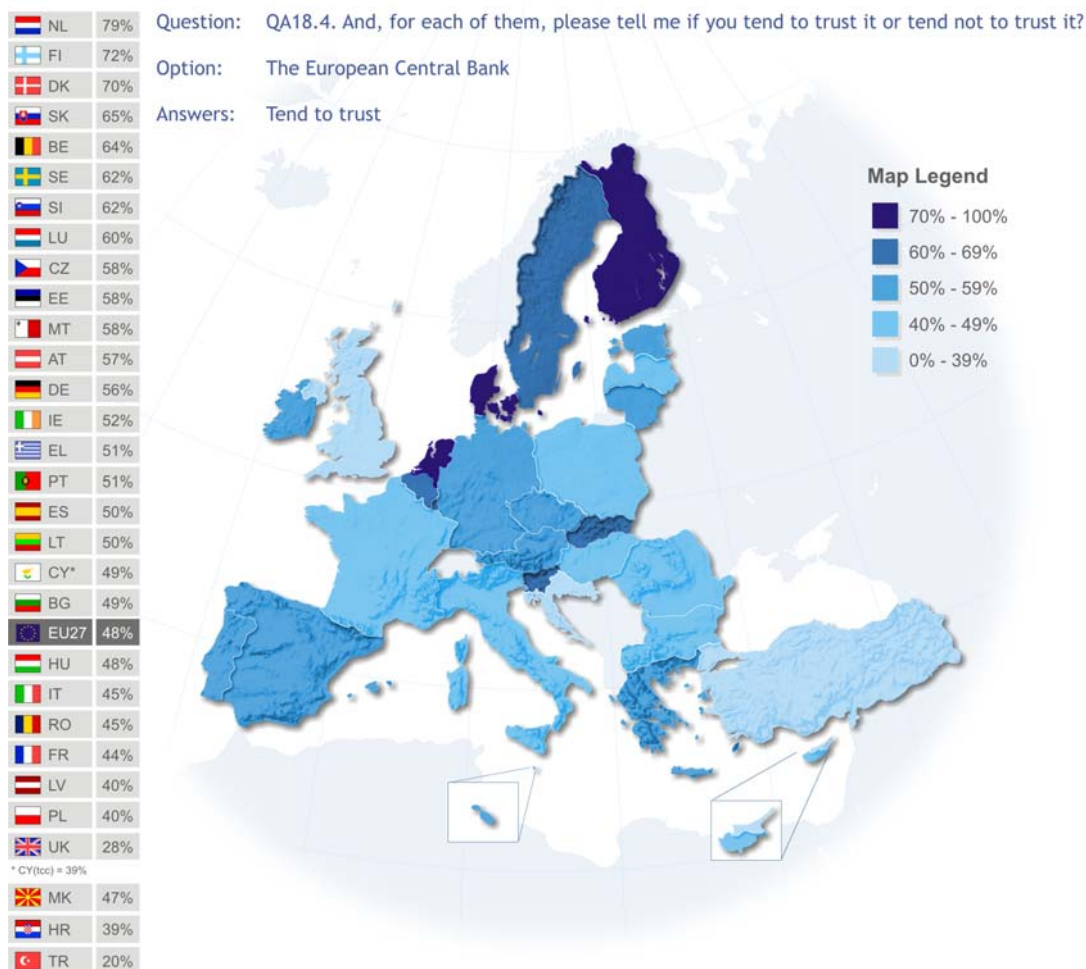
As was the case for the two other European bodies under examination, the increase in distrust has been translated mainly in a drop in the 'don't know' rate in Autumn 2008 (22%; -4 points). Opinion regarding the ECB has polarised.

An analysis of views of the ECB is not complete without looking at differences between the euro area and non-euro area countries. In fact, this comparison shows that public opinion is much more informed in the euro area, where the 'don't know' rate is twice as low as in the non-euro area (16% vs. 32%). In the euro area, over half of citizens express their trust in the ECB (52%), compared to just over two-fifths of citizens from the non-euro countries (41%). At the same time, distrust is also more pronounced in the euro area, although the difference between it and the non-euro zone is relatively small (32% vs. 27%).

Overall, however, country results are once again very much a projection of those seen for the two other bodies discussed. Trust levels still outnumber negative opinions in all except one Member State, namely the UK.

³⁰ QA18 And, for each of them, please tell me if you tend to trust it or tend not to trust it? 4. The European Central Bank

Trust in the ECB obtains the highest level in the Netherlands, where 79% of respondents confirm their trust in this institution. At least three in five respondents in the two other Benelux countries, the three Nordic countries (Finland, Denmark and Sweden), Slovakia and Slovenia also affirm their trust in the ECB.



Once again, the UK (40% not trust vs. 28% trust) and the candidate country Turkey (42% vs. 20%) are the exceptions with more respondents distrusting the ECB than having confidence in it. In Croatia, public opinion is as divided over the ECB (40% vs. 39%), as it is with regard to the European Parliament.














As already noted, respondents in the non-euro area have a far higher 'don't know' rate. The level of 'don't know' replies is particularly high in Romania (43%), Poland (40%), Turkey (38%) and Bulgaria (35%).

Whilst the pattern in the evolution observed since Spring 2008 is similar to those seen for the two other institutions, one exception is the increase recorded in trust in the ECB in the country which is about to introduce the euro³¹, namely Slovakia (65%; +7 points) and Hungary (48%; +3 points). The improved trust in the ECB in

³¹ Slovakia will adopt the European currency on 1st January 2009.

Hungary may be linked to the recent support that Hungary has received from the ECB in withstanding the market pressures³².

The pattern concerning the other shifts is more or less similar to that observed for the European Commission and the European Parliament. In particular, the largest drops in trust levels are once again registered in Cyprus (-15 points) and Portugal (-10 points).

TRUST IN THE EUROPEAN CENTRAL BANK			
% Tend to trust		Autumn 2008 (EB70)	Change Autumn 2008 - Spring 2008
	EU27	48%	-2
	SK	65%	+7
	AT	57%	+7
	FI	72%	+3
	EE	58%	+3
	MT	58%	+3
	HU	48%	+3
	⋮		
	BE	64%	-3
	DE	56%	-4
	IE	52%	-6
	ES	50%	-8
	PT	51%	-10
	CY	49%	-15

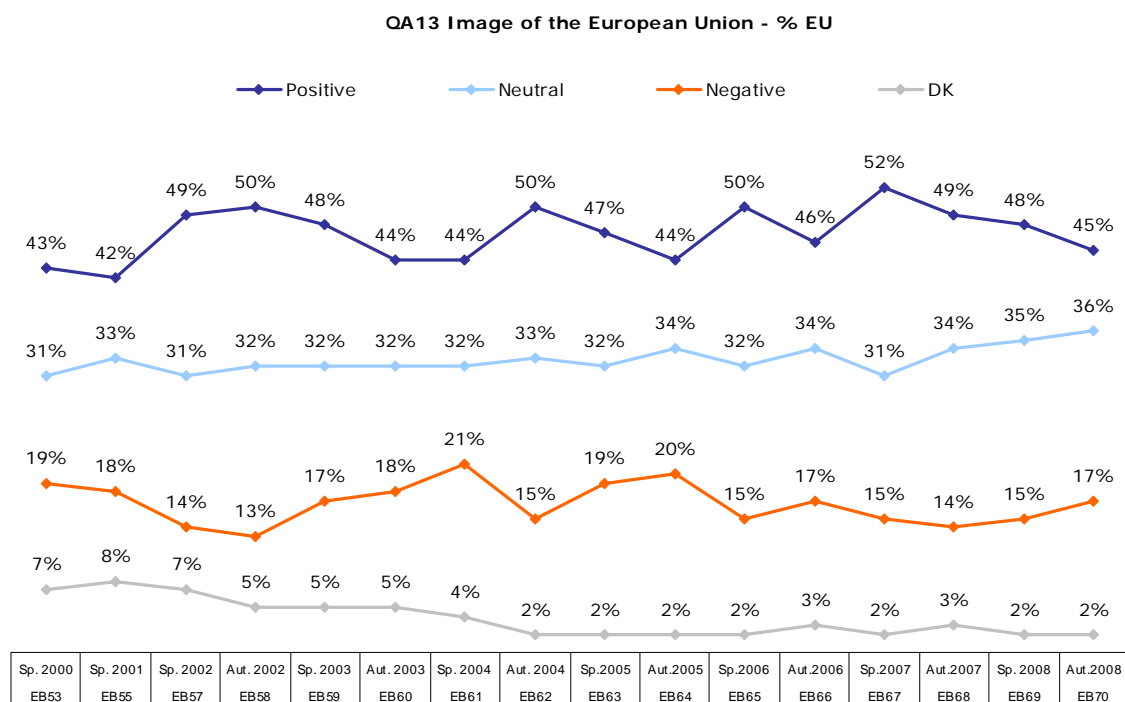
The socio-demographic analysis shows significant differences reflecting the occupation of respondents: trust is greater among managers (59%) than among the unemployed (37%).

³² European Commission Press Release IP-08-1595: <http://europa.eu/rapid>.

7. IMAGE OF THE EUROPEAN UNION

- Perceptions of the image of the EU return to Autumn 2006 level -

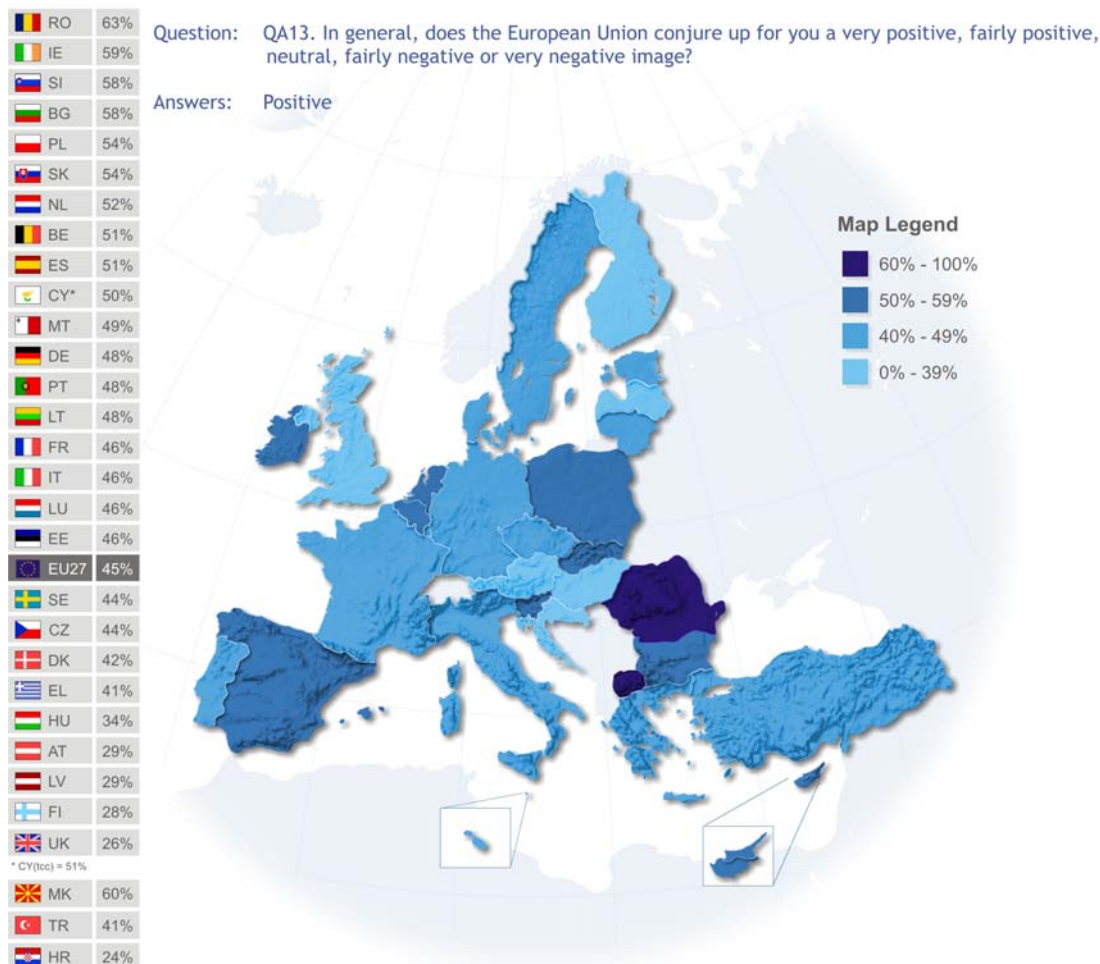
The positive image of the EU is on the decline (45%)³³. Although still the majority view, there are now fewer Europeans who have a positive image of the EU (-3 points), while the proportion of Europeans with a neutral image (36%; +1 point) or a negative image (17%; +2 points) seems to suggest that public opinion is somewhat more cautious or critical.



Over the two previous waves a trend has been established towards a more neutral and cautious view of the EU's image. The newest results confirm this trend and represent a similar situation to that observed in Autumn 2006.

³³ QA13 In general, does the European Union conjure up for you a very positive, fairly positive, neutral, fairly negative or very negative image?

However, as has been observed in previous waves, in most countries the highest proportion of respondents have a positive image of the EU. In Autumn 2008 this is the case in 21 Member States as well as in two candidate countries: the Former Yugoslav Republic of Macedonia and Turkey.



It should be noted that unlike in Spring 2008, there are now no countries where the majority view concerning the image of the EU is negative.

















The most positive opinions among the Member States are registered in Romania (63%), Ireland (59%), Bulgaria and Slovenia (both 58%).

In 6 Member States, the largest proportion of respondents take a neutral stance: Latvia (54%), Finland (52%), Greece (45%), Hungary (43%), Austria (39%) and the UK (37%). In the latter two countries, respondents with a negative image of the EU still represented the majority view in Spring 2008.

Among the candidate countries, respondents in the Former Yugoslav Republic of Macedonia (60%) are very supportive of the image of the EU, followed by 41% of Turkish respondents. The majority view in Croatia is neutral (44%).

- Changes at country level confirm more cautious position of Europeans -

Changes in opinion since Spring 2008 tend more towards declines in positive opinions although increases are recorded in the Netherlands and Germany.

IMAGE OF THE EU			
	% Positive	Autumn 2008 (EB70)	Change Autumn 2008 – Spring 2008
	EU	45%	-3
	NL	52%	+9
	DE	48%	+4
	∴	∴	∴
	RO	63%	-4
	PL	54%	-4
	DK	42%	-5
	HU	34%	-5
	IE	59%	-6
	FI	28%	-6
	BE	51%	-7
	LU	46%	-7
	EL	41%	-7
	PT	48%	-7
	ES	51%	-8
	CY	50%	-8
	MT	49%	-8

Thirteen Member States record a drop of 4 percentage points or more. This is particularly seen in Malta, Cyprus and Spain (all -8) but also in Portugal, Greece, Luxembourg, Belgium (all -7) and Finland and Ireland (-6 each). The candidate countries all register drops of 4 points or more³⁴.

Finally, in socio-demographic terms, a European who has a positive image of the European Union is more likely to...

- ◆ ...be male (50% positive) than female (42%);
- ◆ ...be young (aged 15-24: 54%) compared to the oldest age group (aged 55+: 42%);
- ◆ ...have spent a longer time in education (aged 20+ when finished education: 55%) than to have left school earlier (aged 15-: 36%).
- ◆ ...have a good objective knowledge of the European Union (53%) than to have a poor knowledge of it (29%).

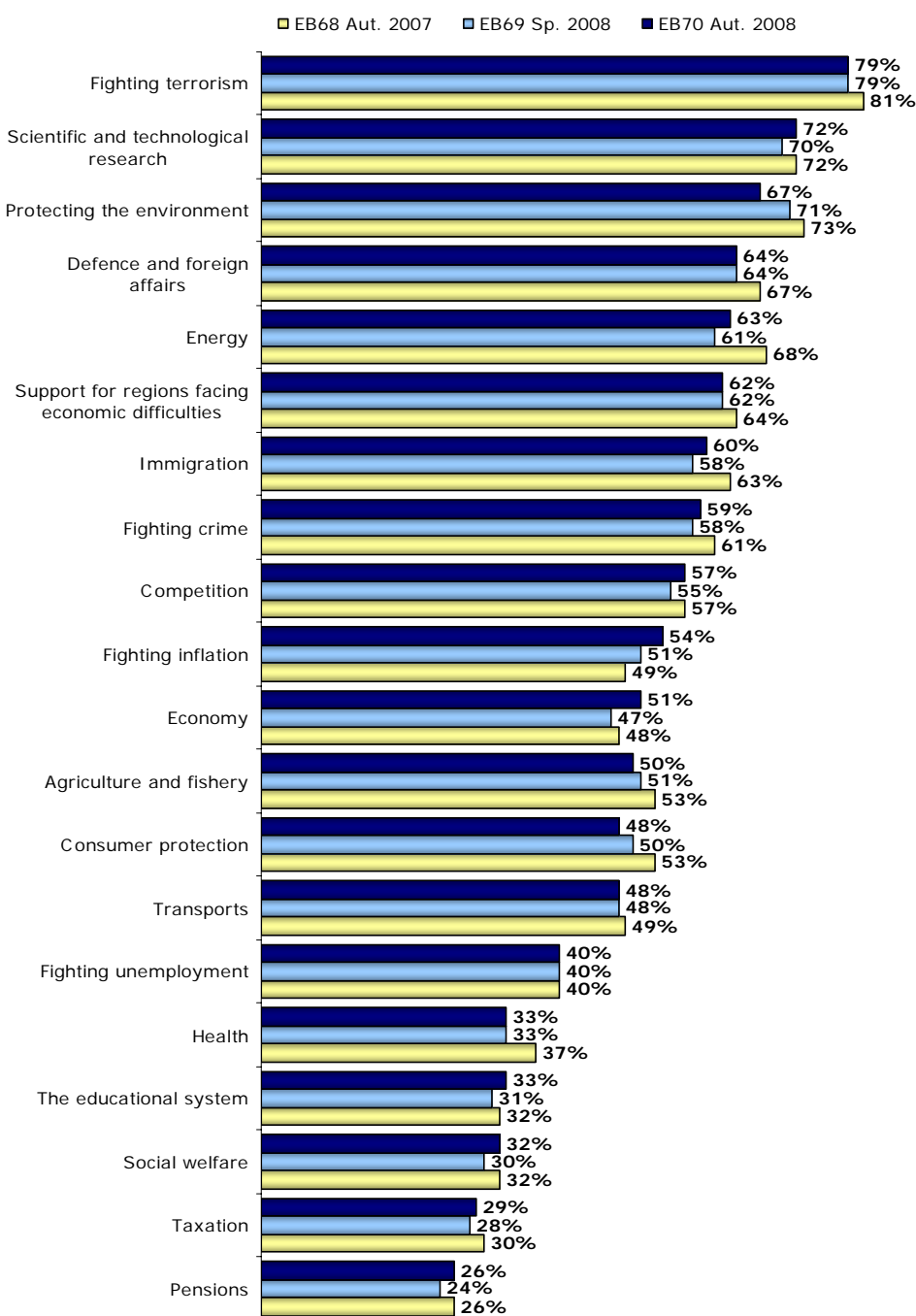
³⁴ Shifts in the % 'positive image': Former Yugoslav Republic of Macedonia: -7; Croatia and Turkey: -8 each.

8. WHAT POLICIES TO BE DECIDED WHERE?

- Increased desire for European decision-making on inflation and the economy -

In this gloomy economic context, this question allows us to see whether European citizens want the European Union to be more active in policy-making, or whether instead they rely more on their national governments.

QA25-QA26 For each of the following areas, do you think that decisions should be made by the (NATIONALITY) Government, or made jointly within the European Union?
- % Jointly within the EU



The latest results show that the proportion of Europeans who want the European Union to take decisions concerning the fight against inflation (54%; +3 points) and the economy (51%; +4 points) has increased³⁵ since Spring 2008. Readers are reminded that these are considered the two most important national issues at the present time as well as the two most important personal concerns of Europeans.

Fighting unemployment remains an area that Europeans prefer to leave to their national governments to decide (57% 'national government'; no change since Spring 2008).

However, there are a wide range of issues for which Europeans believe the European Union is better placed to take decisions than national governments. This remains mostly the case for global issues such as fighting terrorism (79%; no change), scientific and technological research (72%; +2 points) and protecting the environment (67%; -4 points).

There is, however, a group of issues related to national general welfare systems that Europeans prefer to leave in the hands of national governments - such as pensions, taxation, social welfare, the education system and health. Opinion is divided equally when it comes to transport.

Apart from the noted increase in support for more EU decision-making on inflation and the economy, and the drop in support for EU decision-making concerning the environment, public opinion in Autumn 2008 is quite similar to that recorded in the Spring, though we can observe a slight increase in the view that decisions should be taken jointly within the EU in 11 of the 20 policy issues tested. One possible explanation is that in a gloomy economic context, the European Union appears as more powerful than national governments in protecting citizens.

³⁵ QA25/26 For each of the following areas, do you think that decisions should be made by the (NATIONALITY) Government, or made jointly within the European Union?

9. GLOBALISATION

Although the term 'globalisation' embraces not just economic aspects but also cultural and social facets, its meaning is often limited to the integration of economies. In this section, we examine how Europeans – in the current adverse economic climate – perceive the role of the EU in the globalising world.

- Increased tendency to see the European Union as a protective force for countering the negative effects of globalisation, at least in some countries -

In order to grasp the pluralistic nature of globalisation, the total sample was split in half and each group was posed a differently slanted question about the capability of the EU to act on behalf of its citizens in tackling globalisation³⁶. One statement was formulated negatively and the other positively.

QA34 To what extent do you agree or disagree with the following statement:

SPLIT A: The European Union helps to protect us from the *negative effects* of globalisation.

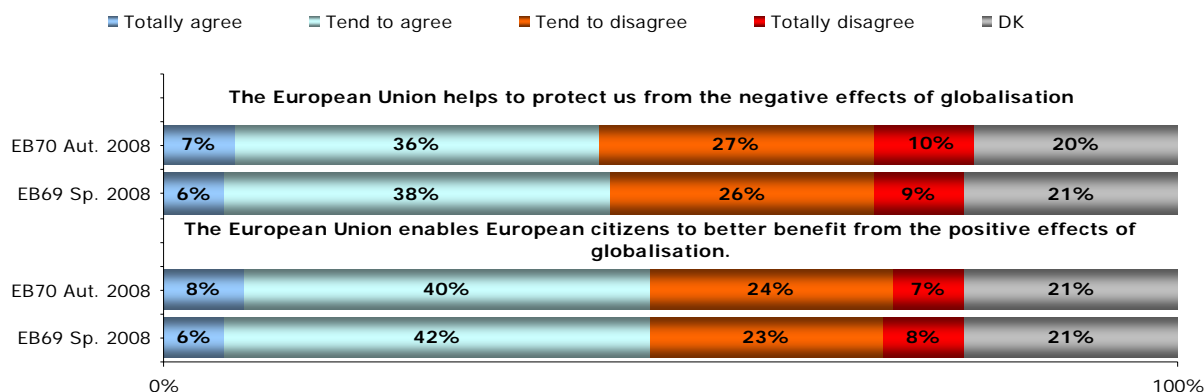
SPLIT B: The European Union enables European citizens to better benefit from the *positive effects* of globalisation.

As in Spring 2008, we find that, **regardless of the wording of the statement, a relative majority of Europeans recognise the role of the EU in enabling its citizens to benefit from globalisation (48%, no change since Spring 2008) as well as protecting them from its negative effects (43%, -1).**

We also see, however, that substantial proportions disagree with this view (31% and 37% respectively). Furthermore, it is notable that 1 in 5 Europeans cannot formulate an answer for both splits (21% and 20% respectively).

³⁶ A technique known in opinion polling as a "Split Ballot"





























QA34 To what extent do you agree or disagree with the following statement...
- % EU































More importantly, the recorded shifts since Spring 2008 appear to correlate to some extent with general national developments concerning the state of the (European) economy: in countries where the mood is particularly pessimistic, the proportion of respondents who agree with the statements has dropped. For example, this is the case in Sweden, where half of respondents (50%) expect the situation of the European economy to get worse: the statement "the European Union helps to protect us from the negative effects of globalisation" dropped by 7 points and "the European Union enables European citizens to better benefit from the positive effects of globalisation" decreased by 6 points.

Conversely, in countries where we have witnessed less intense negative expectations concerning the European economy, the proportion of respondents who agree with the statements has increased. In Slovakia, where just 32% of respondents expect the European economy to get worse, more citizens agreed on the two statements (respectively +2 points and +1 point). **Citizens in these countries may see the European Union as a protective force for countering the negative effects of globalisation.**

The European Union helps to protect us from the negative effects of globalisation. (SPLIT A) (+/- Spring 2008 in brackets)

	EU27	Agree 43% (-1)	Disagree 37% (+2)
	NL	56% (-3)	32% (+5)
	BE	55% (-6)	40% (+7)
	SK	51% (+2)	29% (-5)
	CY	50% (+8)	26% (-8)
	FI	49% (+2)	40% (+3)
	PL	49% (0)	24% (0)
	DK	48% (-14)	41% (+13)
	DE	47% (+6)	41% (-3)
	SE	46% (-7)	35% (+5)
	IT	46% (+3)	32% (-1)
	AT	45% (+15)	44% (-10)
	CZ	45% (+4)	39% (-2)
	EE	45% (-1)	36% (+2)
	BG	44% (0)	17% (-4)
	RO	43% (+2)	26% (+4)
	PT	43% (-9)	25% (0)
	SI	41% (-2)	48% (+1)
	ES	41% (-8)	23% (+3)
	LU	40% (-6)	43% (+3)
	HU	40% (-5)	40% (-1)
	MT	40% (-8)	30% (+8)
	EL	39% (-2)	60% (+4)
	IE	38% (-4)	26% (+3)
	LT	37% (+1)	29% (+9)
	FR	36% (-4)	56% (+8)
	UK	36% (-3)	39% (+3)
	LV	26% (0)	57% (+7)

The European Union enables European citizens to better benefit from the positive effects of globalisation. (SPLIT B) (+/- Spring 2008 in brackets)

	EU27	Agree 48% (0)	Disagree 31% (0)
	DK	73% (+1)	17% (-2)
	SE	66% (-6)	15% (-1)
	NL	63% (+3)	23% (-2)
	FI	62% (+2)	28% (-4)
	SK	59% (+1)	23% (-3)
	MT	56% (-2)	13% (+1)
	PL	54% (-5)	17% (+1)
	BE	54% (-7)	40% (+7)
	IE	50% (+4)	14% (-2)
	UK	50% (+6)	24% (-3)
	DE	50% (+8)	38% (-7)
	EE	49% (-6)	22% (+1)
	LT	48% (-4)	17% (+1)
	IT	48% (-2)	32% (+2)
	CZ	48% (-1)	36% (+2)
	BG	47% (-1)	16% (0)
	HU	47% (-5)	32% (0)
	LU	47% (+4)	37% (-1)
	AT	46% (+8)	44% (-3)
	PT	44% (-10)	24% (+1)
	CY	42% (-10)	28% (+11)
	RO	41% (-10)	19% (+7)
	ES	41% (-7)	24% (+5)
	EL	41% (-4)	57% (+4)
	SI	40% (-1)	44% (0)
	LV	37% (-1)	39% (+6)
	FR	35% (-2)	50% (+3)

The results at national level can be summarised as follows:

- ◆ Overall, the majority view of the ability of the EU to protect its citizens from the negative effects of globalisation is positive in 19 Member States. This number increases to 23 in response to the positively formulated statement about the EU's ability to promote the positive effects of globalisation among Europeans.
- ◆ For the negatively worded version of the question, the most positive opinions on the EU's role are found in the Netherlands and Belgium. For the positively worded version, the most positive opinions are found in Denmark and Sweden. It should be noted that these latter two countries appear far lower in the ranking for the negatively worded statement.
- ◆ There is a group of countries where the majority of respondents disagree with *both statements*: France, Greece, Latvia, Slovenia. Luxembourg and the UK form the exceptions in this pattern, with a (relative) majority disagreeing with the "Split A" statement and a (relative) majority agreeing with the "Split B" statement.

Finally, in socio-demographic terms, we can observe that the impression that the European Union is able to protect citizens from the negative effects of globalization is more widespread among those categories which are probably in a more comfortable financial position. The proportion of those who agree with this statement is higher among:

- ◆ ...the more educated (50% agree) than among those who left school earlier (36%);
- ◆ ... managers (52%) than those who are unemployed (38%);
- ◆ ...and those who say that they have no difficulties in paying their bills (47%) than those who struggle at the end of each month (40%).

PART II: POLICY ISSUES

10. GEORGIA

The long lasting tensions between Russia and Georgia escalated into open conflict in South Ossetia in early August 2008.

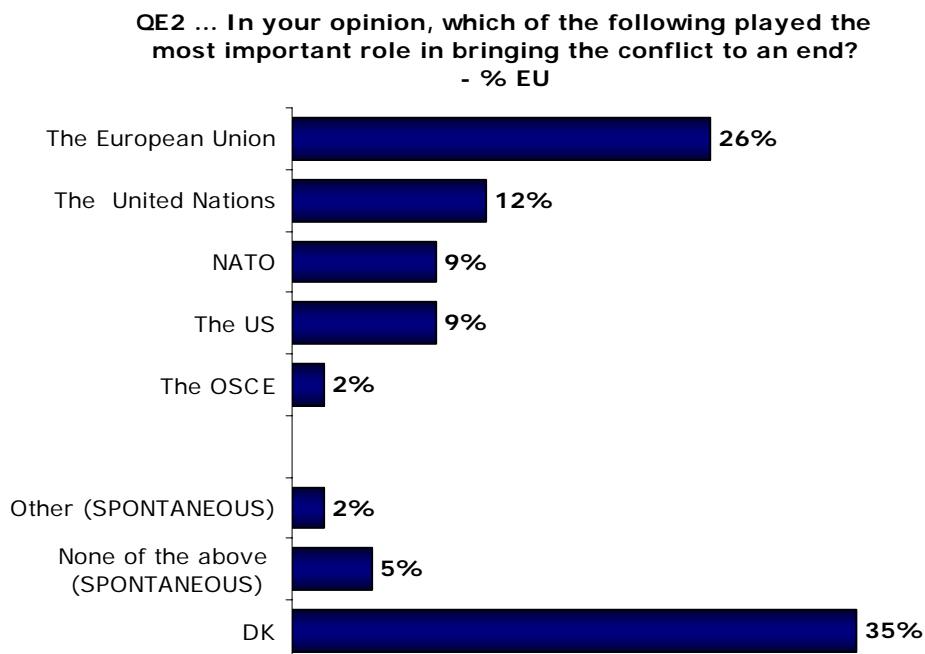
In this chapter, we examine which of the international actors is perceived to have played the most important role in bringing the conflict in South Ossetia to an end. We also analyse the perceived impact of this conflict on the security of energy supply in the European Union.

- The European Union is seen as the actor playing the most important role in bringing the conflict to an end, although a relative majority were unable to answer -

Just over a quarter of Europeans believe that the EU played the most important role in bringing the conflict in Georgia to an end (26%)³⁷. Far fewer Europeans ascribe this role to any other international actor: 12% for the UN, an equal proportion of 9% for NATO and the US, and only 2% for the OSCE³⁸. However, the majority of respondents do not know who played the most important role in ending this conflict (35%), suggesting that public opinion is relatively ill-informed in this regard.

³⁷ QE2 Continuing tensions in one region of Georgia, South Ossetia, led to open conflict between the armed forces of Georgia and Russia. In your opinion, which of the following played the most important role in bringing the conflict to an end?

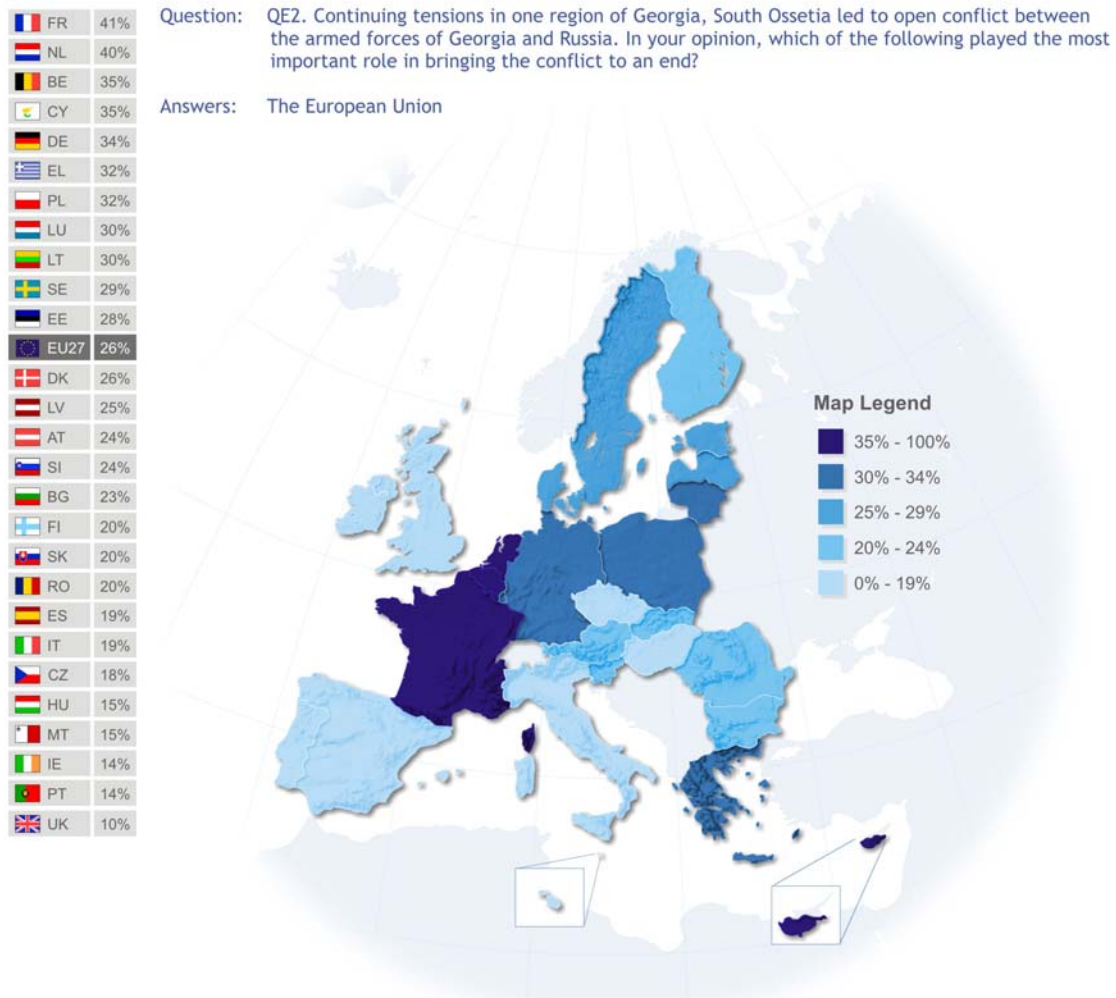
³⁸ OSCE is the abbreviation for the Organisation for Security and Co-operation in Europe.
See: www.osce.org.



The country-by-country results reflect these findings. Of the five international actors included in the question, the EU is most frequently selected by respondents in nearly all Member States. The UK and Ireland form the only real exceptions, both mentioning the United Nations more frequently than the EU (18% vs. 10% respectively for the UK, 17% vs. 14% for Ireland). Furthermore, Portuguese respondents mention the European Union and the United Nations equally often (14% each) and in Slovakia 'EU' and 'United Nations' replies are almost equally frequent (20% vs. 19%, respectively).

Yet in 16 of the 27 Member States, we find that 'don't Know' answers are the most common, with the highest rates registered in Spain (57%), Portugal, Malta (53% each) and Bulgaria (51%).

This high 'don't know' rate inevitably affects the interpretation of national results. Differences in the numbers of respondents who feel that the EU played the most important role can be largely explained by the proportion of 'don't know' answers. Nonetheless, it is interesting to note that with the role played by French president Sarkozy, France registers the highest proportion of respondents believing that the EU played the most important role in bringing the conflict to an end (41%). The other countries where more than a third of respondents hold this view are the Netherlands (40%), Cyprus and Belgium (35% each) and Germany (34%).

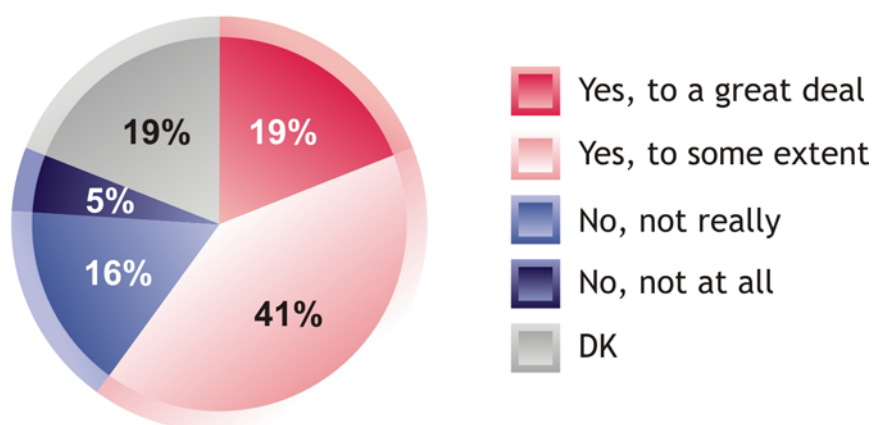


It should be noted that the proportion of respondents who think that the EU played the most important role in bringing the conflict to an end is higher among those who have spent longer in education (36% vs. 19% of those who left school at the age of 15 or before).

- Most Europeans voice concerns over the effect of the conflict on Europe's energy supply -

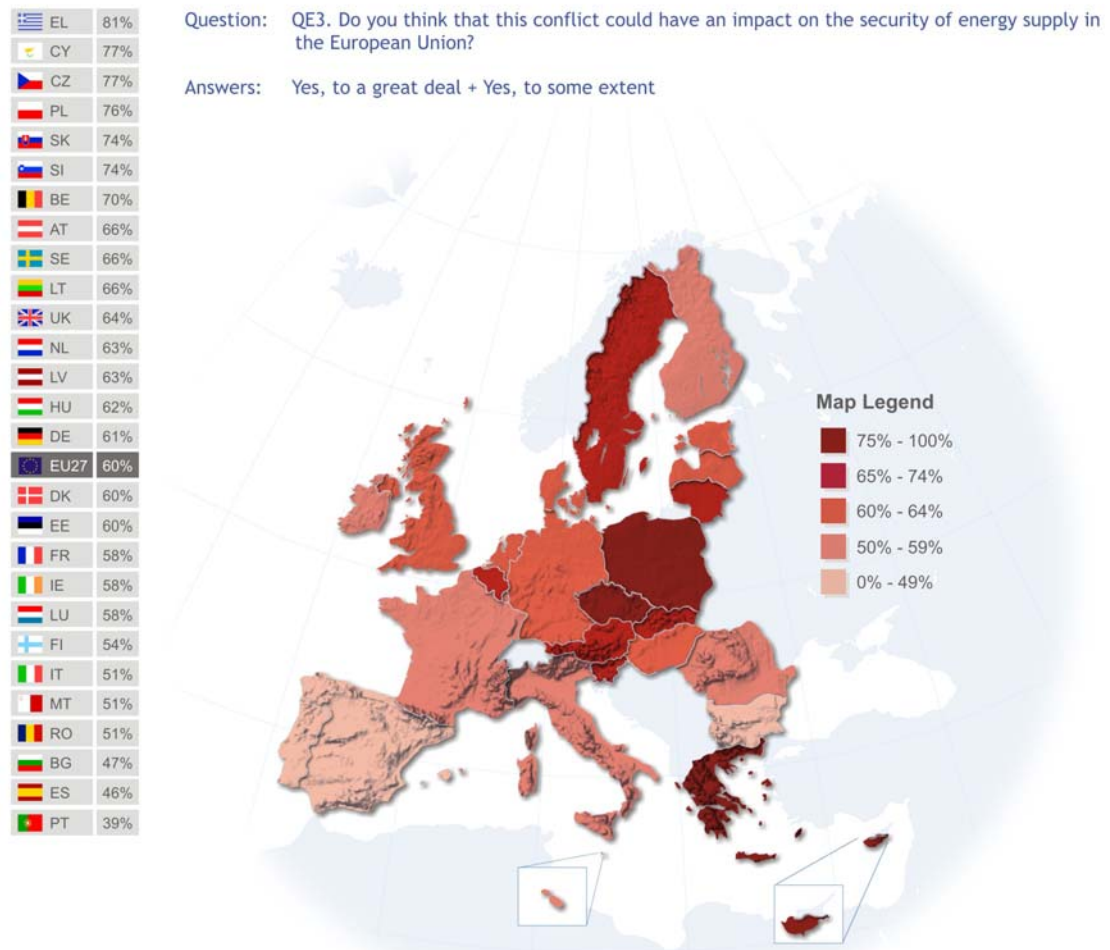
Europeans voice lively concerns about the impact of the Georgian conflict on Europe: **three out of five Europeans think that the Georgian conflict could have an impact on the security of energy supply in the EU (60%)³⁹**. Around one respondent in five disagrees (21%) or lacks an opinion (19%).

Question: QE3. Do you think that this conflict could have an impact on the security of energy supply in the European Union?



Concern that the Georgian conflict may affect the energy supply in the EU is greatest in Greece, where 81% of respondents express this view. Over 7 out of 10 respondents in the Czech Republic, Cyprus (77% each), Poland (76%), Slovakia and Slovenia (74% each) also voice concern.

³⁹ QE3 Do you think that this conflict could have an impact on the security of energy supply in the European Union?



It would thus appear that citizens living in countries that are geographically closer to Georgia or Russia are the most worried, maybe because they are more dependent on energy supplies from Russia or other outside suppliers. However, the large variations in the 'don't know' rates again make it difficult to carry out a precise comparison of national views. 'Don't know' rates are highest in Spain (44%), Malta (39%), Portugal (36%) and Bulgaria (34%).

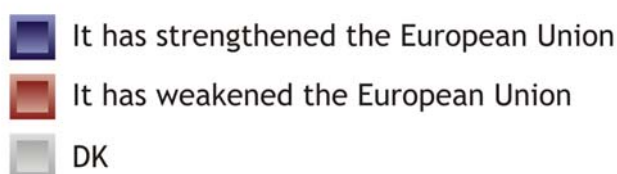
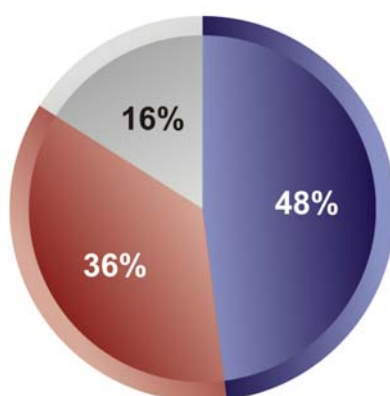
From a socio-demographic point of view, concern varies among age groups (65% of the 40-54 band, 59% of the over 55 and 60% of the 25-39 band vs. 50% of the 15-24 band), and according the time spent in education (68% of those in education to age 20+ vs. 52% of those whose education ended at the age of 15 or before).

11. THE IRON CURTAIN & ENLARGEMENT

- Close to half of Europeans feel that enlargement has strengthened the EU and around two-third believe that the fall of the Berlin Wall has been beneficial for the EU -

The Iron Curtain divided Europe into two separate areas from the end of World War II until the fall of the Berlin Wall in 1989. The fall of the Berlin Wall opened the way for further enlargement of the EU and since 2004, 12 countries have joined the Union. **Overall, close to half of Europeans feel that this enlargement has strengthened the European Union (48%)⁴⁰.** Conversely, just over a third of Europeans feels that the enlargement from 15 to 27 countries has weakened the European Union (36%).

Question: QC2. Since 2004 the European Union enlarged from 15 to 27 countries. Overall, how would you judge this enlargement of the European Union?



Twenty years later, the symbolic Iron Curtain continues to divide public opinion: in the 12 newer Member States, enlargement is widely viewed as a positive development for the EU (59% 'strengthened' vs. 21% 'weakened'), whereas in the 15 'old' EU Member States, views are more divided (44% vs. 40%).

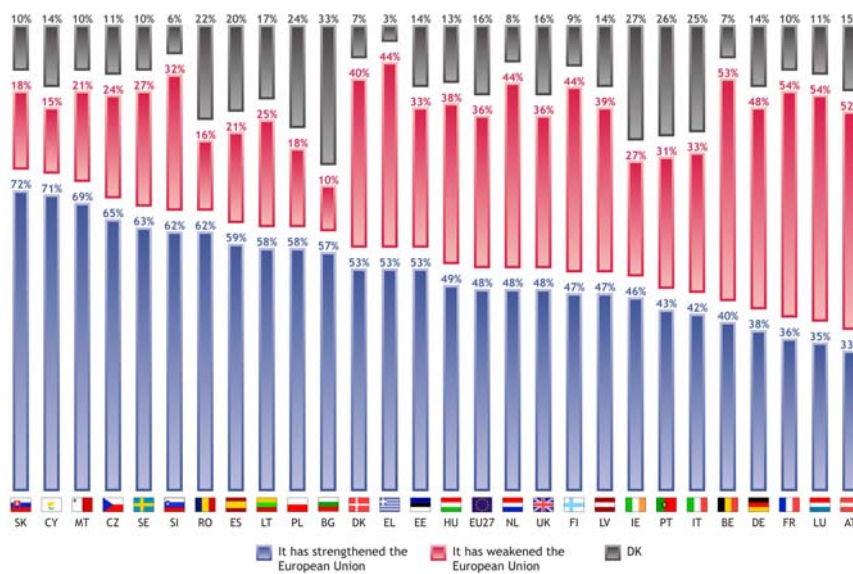
In all the 12 countries that have joined the EU since 2004, the majority view is that this enlargement has strengthened the EU, with over half of respondents

⁴⁰ QC2 Since 2004 the European Union enlarged from 15 to 27 countries. Overall, how would you judge this enlargement of the European Union?

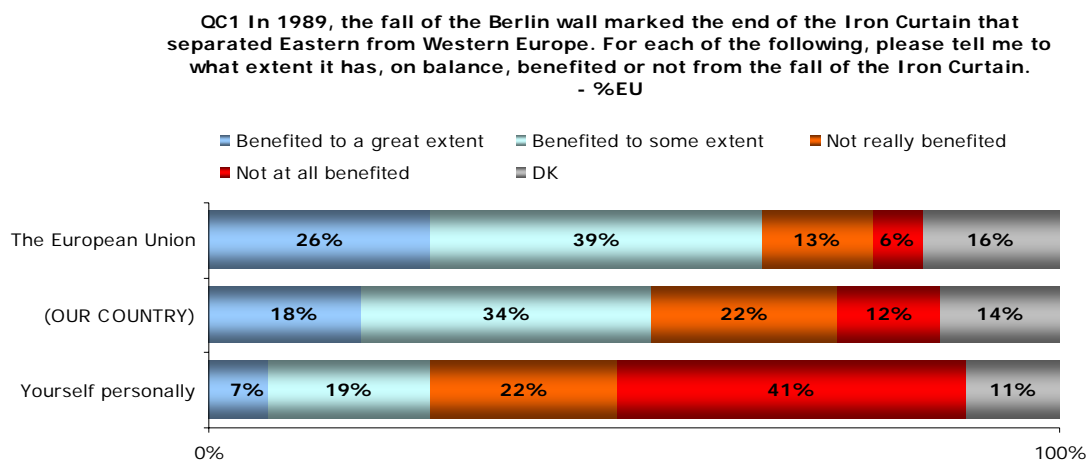
expressing this view in ten of these countries, led by Slovakia (72%) and Slovenia (71%).

In the 15 'old' Member States, an outright majority for the view that enlargement from 15 to 27 Member States has strengthened the EU is only registered in Sweden (63%), Spain (59%), Denmark and Greece (53% each). A relative majority agree in 6 further countries, although the proportion of respondents who disagree is nearly as large in Finland and the Netherlands (Finland: 47% 'strengthened' vs. 44% 'weakened'; the Netherlands: 48% vs. 44%). Conversely, in France, Luxembourg (54% each), Belgium (53%), Austria (52%) and Germany (48%), the majority view is that the enlargement from 15 to 27 countries has weakened the European Union.

Question: QC2. Since 2004 the European Union enlarged from 15 to 27 countries. Overall, how would you judge this enlargement of the European Union?




A far higher proportion of Europeans (65%) feel that the EU has, on balance, benefited from the fall of the Iron Curtain. On average, 52% of Europeans feel that their **country has benefited** from the fall of the Iron Curtain. Finally, just over a quarter of Europeans feel that **they themselves have benefited** (26%)⁴¹.




The geographical divide noted with regard to people's stance on enlargement is also present in their views of the fall of the Iron Curtain. The symbolic boundary is most evident in relation to the perceived *national* benefits of the fall: in the 12 newer Member States, 63% of citizens feel that their country has benefited from its fall, compared to just under half of citizens in the 15 'old' Member States (49%). With regard to the *personal* benefits, the difference between the two groups of countries is nearly as pronounced (13 point differences in % 'benefited' in the 12 newer Member States against EU15). The difference is least marked when it comes to the perceived benefits for the EU (8 point difference).

⁴¹ QC1 In 1989, the fall of the Berlin wall marked the end of the Iron Curtain that separated Eastern from Western Europe. For each of the following, please tell me to what extent it has, on balance, benefited or not from the fall of the Iron Curtain. 1. The European Union. 2. (OUR COUNTRY). 3. Yourself personally.

% 'Benefited' by Geographical Divide					
			Geographical Divide		
					
			EU15	NMS12	
QC1 In 1989, the fall of the Berlin wall marked the end of the Iron Curtain that separated Eastern from Western Europe. For each of the following, please tell me to what extent it has, on balance, benefited or not from the fall of the Iron Curtain.	The EU		65%	63%	71%
	(OUR COUNTRY)		52%	49%	63%
	Yourself personally		26%	23%	36%

It is particularly interesting to analyse the differences in results from respondents interviewed in the former West and East Germany. Interviewees from both parts of Germany agree that the fall of the Wall that divided their country was beneficial for the European Union, though East Germans are more positive (84% vs. 72% of West Germans). There is a greater divergence of opinion regarding the benefits to Germany: 7 out of 10 respondents in West Germany think that their country has benefited from the fall of the Iron Curtain, but this proportion rises to 88% among former East Germans. Finally, there is a strong division of opinion between East and West when we analyse opinions regarding the personal benefits of the fall of the Iron Curtain. Though it is quite obvious to interviewees in East Germany that they have personally benefited from this historic event (60%), a contrary pattern emerges among respondents from West Germany (only 31% think that they have benefited from the fall of the Wall, with 68% disagreeing).

Finally, in socio-demographic terms, a European who believes that the fall of the Iron Curtain has been beneficial is, for all three aspects – European, national and personal levels –, more likely to have spent a longer time in education (aged 20+ when finished education) than to have left school earlier. The table below highlights the importance of education in this regard.

% 'Benefited' by Age at end of education					
		Age at end of education			
			<15	16-19	20+
QC1 In 1989, the fall of the Berlin wall marked the end of the Iron Curtain that separated Eastern from Western Europe. For each of the following, please tell me to what extent it has, on balance, benefited or not from the fall of the Iron Curtain.	The EU	65%	54%	65%	77%
	(OUR COUNTRY)	52%	41%	51%	64%
	Yourself personally	26%	17%	25%	36%

12. THE EUROPEAN UNION BUDGET

The Eurobarometer regularly measures public knowledge of how the European Union budget is spent. These analyses have highlighted the tendency of Europeans to over-estimate the costs of the EU's administrative overheads⁴².

This wave of the Eurobarometer examines knowledge of how the EU budget is spent. However this time, the question has been changed by asking respondents not only what they think most of the EU budget is spent on but by subsequently asking them how they would like most of the budget to be spent. The new question also allows respondents to choose from a much wider range of expenditure areas than the old question did⁴³.

- EU budget remains a mystery to many Europeans and administrative overheads over-estimated -

Europeans continue to over-estimate the administrative overheads (26%)⁴⁴ which is the most frequently mentioned expense. Following on from this, slightly under a quarter of Europeans estimate that most of the European Union's budget is spent on 'economic growth' and 'agriculture and rural development' (24% for both).

Overall, it appears that the EU budget is still a topic about which few Europeans are well-informed. This is reflected in the high 'don't know' rate (25%).

Yet Europeans have a somewhat more outspoken opinion on how the EU budget should be spent. In light of the current economic crisis, and taking account of the widespread concern voiced by Europeans in this respect, it is not surprising to find that the **most popular areas on which Europeans would like the EU budget to be spent are economic growth (38%) and employment and social affairs (36%)⁴⁵**.

⁴² The last result (Autumn 2006, EB66) was that 27% of Europeans considered administrative overheads to account for the largest slice of the European Union's budget.

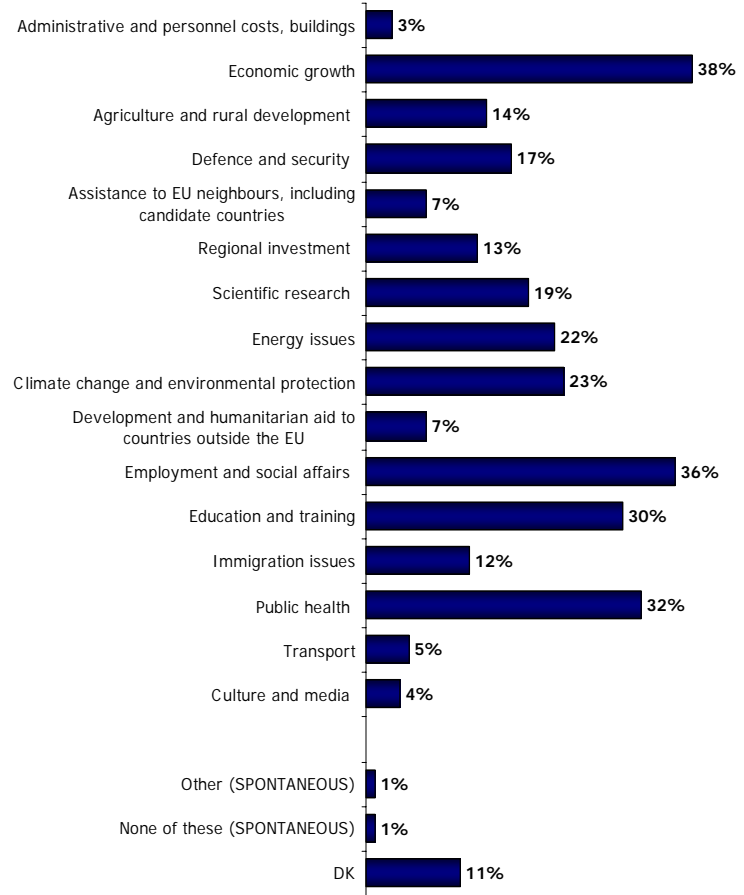
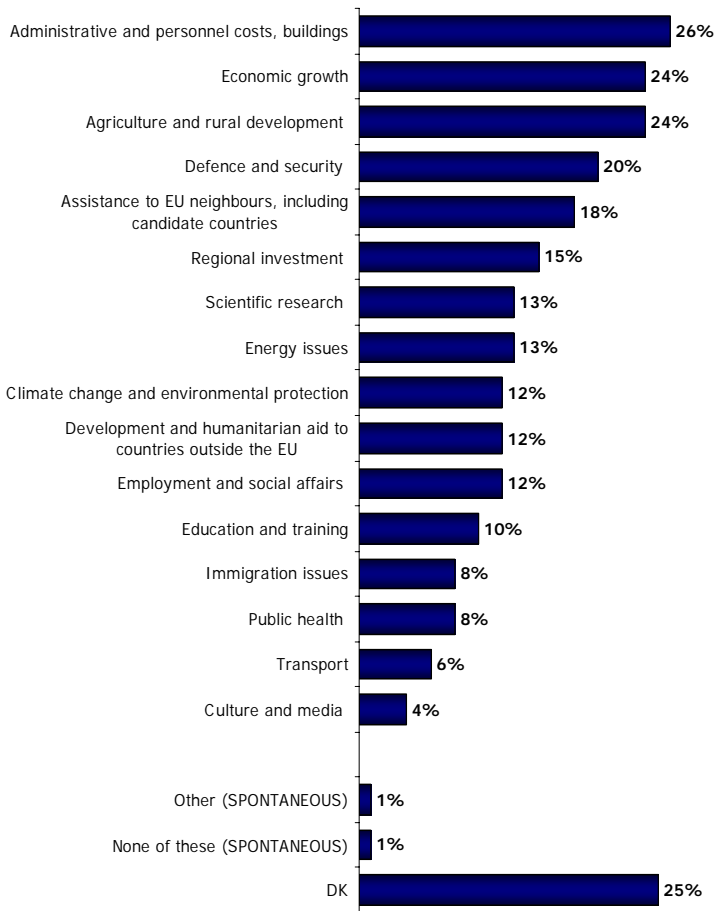
⁴³ The question now has 16 areas of expenditure from which respondents can select the one on which they think most of the EU budget is spent, compared to only 6 the last time the question was asked in Autumn 2006 (EB66).

⁴⁴ QG2a On which of the following do you think most of the European Union budget is spent? Firstly? Any others? (Total 'first answer' and 'other answers')





























⁴⁵ QG3a And on which of the following would you like European Union budget to be spent? Firstly? Any others? (Total 'first answer' and 'other answers')

QG2a + QG2b On which of the following do you think most of the European Union budget is spent? (MAX. 4 ANSWERS) - % EU

QG3a + QG3b And on which of the following would you like European Union budget to be spent? (MAX. 4 ANSWERS) - % EU

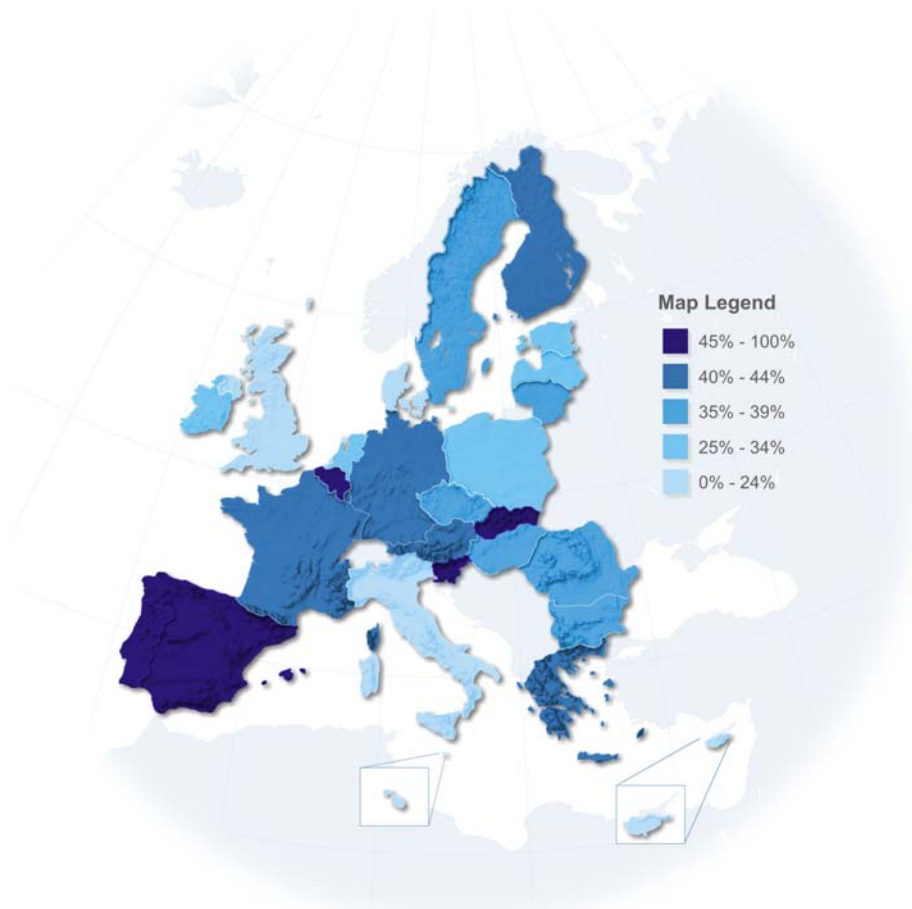


A country-by country analysis indicates that, apart from few exceptions, countries where the largest share of citizens would like the EU budget to be spent on economic growth or on employment and social affairs tend to be those where the concerns about the economic situation are most pronounced. Hence, we find that Greece (65%) tops the list when it comes to wanting EU money to be spent on economic growth, followed by Lithuania (57%), Bulgaria and Hungary (both 55%).

 SI	56%
 ES	51%
 SK	50%
 PT	47%
 BE	45%
 DE	44%
 AT	44%
 FI	44%
 FR	43%
 LU	43%
 EL	42%
 SE	39%
 HU	39%
 CZ	38%
 BG	37%
 RO	37%
 EU27	36%
 LT	35%
 NL	34%
 LV	34%
 IE	31%
 EE	30%
 PL	28%
 DK	24%
 IT	22%
 CY	19%
 MT	19%
 UK	16%

Question: QG3T. Desired use of the European Union's budget

Answers: Employment and social affairs



When it comes to wanting EU money spent on employment and social affairs, Spain sits near the top of the table, just behind Slovenia (51%). It should be recalled that Spain currently has the highest unemployment rate in the EU⁴⁶.

Not surprisingly, this issue is mentioned by 46% of unemployed respondents, whereas it seems less of a major issue for the retired (32%) and the self employed (31%).

⁴⁶ September 2008 Eurostat unemployment figures. See <http://ec.europa.eu/eurostat/euroindicators>

13. THE BUILDING OF EUROPE

In this final chapter, we examine the views of Europeans concerning the building of Europe⁴⁷.

Respondents were asked what they think the main objective of the building of Europe is at the current time⁴⁸ and what the main objective should be⁴⁹. One of the objectives suggested to respondents related to globalisation. In order to ascertain whether people's opinions about the further integration of the European Union – the building of Europe - were influenced by the way globalisation was described, one half of the sample was presented with the item which depicted globalisation in a positive light, the other half with this item worded in a negative way⁵⁰. All the other items proposed were exactly the same. The outcome of the split-ballot test is that the difference for the item on globalisation is marginal and the hierarchy of the objectives is the same for both subsamples, with only minor differences noted between the two samples in the proportion of respondents selecting each of the objectives. There is therefore no need to distinguish between the two samples and we present the results of the questions for the sample as a whole.

- Developing the EU economy is seen as the priority at the current time, but the main objective of Europe should be improving the standard of living -

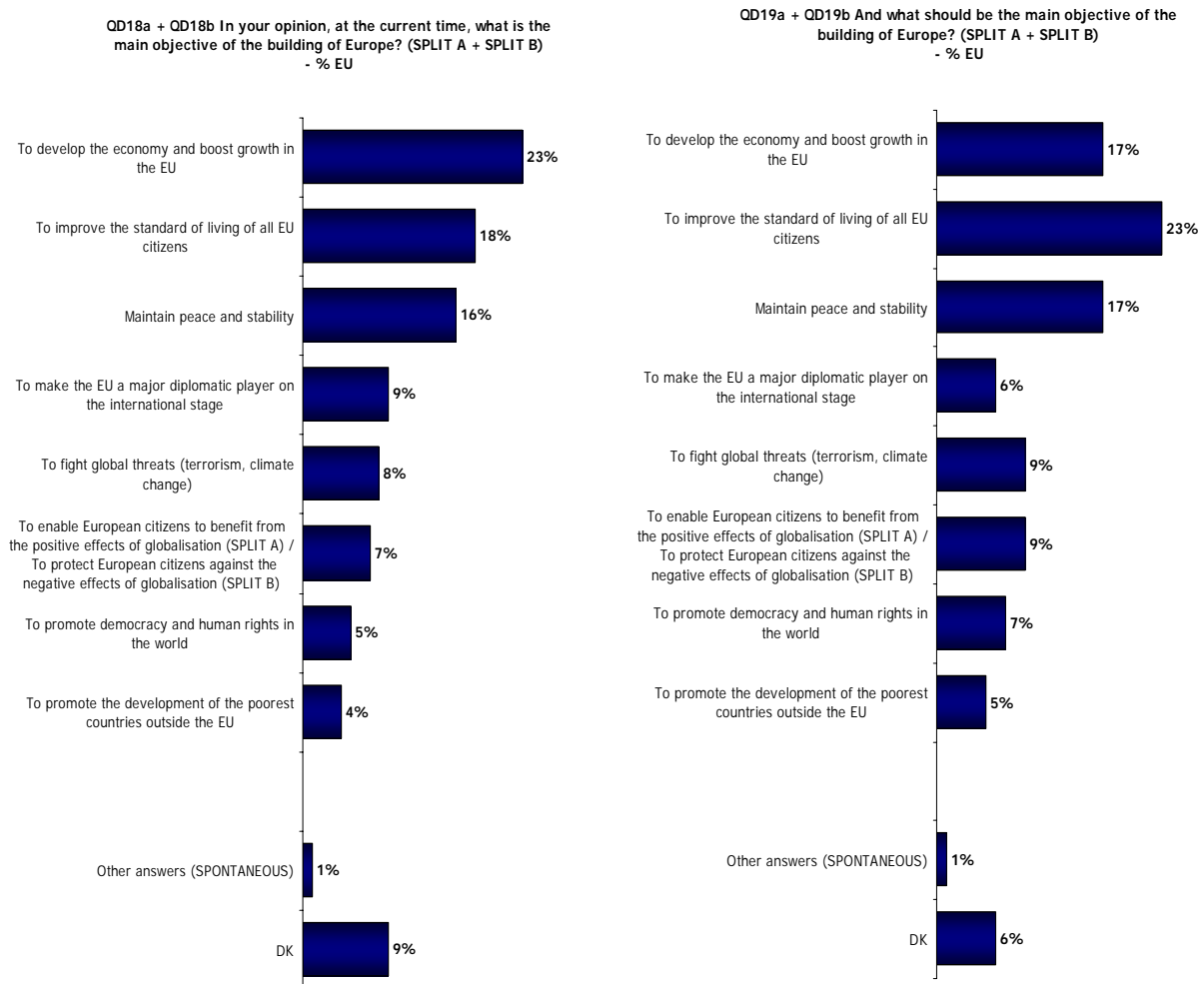
In the current economic climate, **Europeans believe that the main objective of the building of Europe at present is to develop the EU economy and to boost growth**: 23% believe this is the main objective of the European project at present, ahead of improving the standard of living of Europeans (18%) and maintaining peace and stability (16%).

⁴⁷ This question is taken from the European Parliament part of the survey.

⁴⁸ QD18 In your opinion, at the current time, what is the main objective of the building of Europe?

⁴⁹ QD19 And what should be the main objective of the building of Europe?

⁵⁰ A technique known in opinion polling as a "Split Ballot"; in this case, half of the sample was asked the item "To enable European citizens to benefit from the positive effects of globalisation (development of cultural exchanges, new export opportunities for European businesses)", and the other half, the item "To protect European citizens against the negative effects of globalisation (relocation of industries and jobs, competition from emerging countries for European businesses)".



But when asked what *should be the main objective of the building of Europe*, nearly a quarter of Europeans mention **improving the standard of living of all EU citizens (23%)**, ahead of economic development and maintaining peace and stability (17%, each).

Though there are few differences between the perception of the *existing* objectives of the building of Europe and those that *should be pursued* – the top three are the same, with a slight difference in hierarchy –, Europeans would prefer the European project to focus primarily on improving their standard of living. Developing the economy and boosting growth seem to be seen as less immediately beneficial to respondents than improving the standard of living.

Taking a closer look at the results by country shows that **developing the EU economy is the most frequently mentioned *current* objective in 19 of the 27 Member States**. This opinion is most widely voiced in Sweden (39%), Cyprus and the Netherlands (33% each). In Latvia (28%), Portugal (27%), Malta (26%), the Czech Republic (21%), Spain (19%) and the UK (16%) improving the living conditions of Europeans is most widely considered as the main objective of the building of Europe at the current time. In Estonia (29%) and Germany (25%) maintaining peace and security tops the list of main current objectives.

Finally, a national analysis of what *should be* the main objective of the building of Europe highlights **the great importance that Europeans attach to a high standard of living**. In 19 Member States, a relative majority of respondents believe this should be the main objective of the European project, with the highest proportions recorded in Bulgaria (43%), Slovakia (40%) and Slovenia (38%). However, **peace and stability are also greatly valued** with respondents in 6 countries believing that maintaining this important privilege should be the main objective of the building of Europe. In Estonia (28%), Germany and Finland (26% each) over a quarter of Europeans hold this view. Finally we see that in Ireland and the Netherlands, developing the EU economy and boosting its growth tops the list of what should be the main objective with 26% and 21%, respectively⁵¹.

⁵¹ It should be noted that, though not the 'top answer', similar scores are registered in Lithuania (23%), Bulgaria, Greece, Latvia (22% each) and Slovakia (21%).

Conclusion

The results for this Standard Eurobarometer 70 - carried out shortly after the collapse of the Lehman Brothers' Bank, and with fieldwork coinciding with the announcement that the euro area is experiencing an economic slowdown- shows evidence of further concerning opinion swings. These appear largely driven by the negative perceptions of the economic situation in Autumn 2008, overshadowing European public opinion in all respects.

After an in-depth analysis of European indicators we can distinguish the following trends in European public opinion in Autumn 2008:

The strongest trend and driving force is indisputably the dramatically worsening assessment of the economic situation.

- ◆ The broad majority of respondents give a gloomy assessment of the current economic and employment situation at national level, for the EU as a whole and globally. The proportion of respondents who consider that the situation is good has declined to 33% for the European economy (-25 percentage points) and to 29% for the national economy (-19).
- ◆ Over half of Europeans now expect the employment (53%; +14 points) and economic situation (51%; +5 points) to worsen over the next 12 months. Nearly half of Europeans hold this view concerning the global economy (49%) and 41% expect the European economy to worsen over the next 12 months (+15 points).
- ◆ Europeans now consider inflation and the economy as the two most important issues facing their country (37% each). The proportion mentioning the economy as the most important concern has increased by 17 percentage points since Spring 2008. The proportion mentioning inflation increased between Autumn 2007 and Spring 2008 (+11 points) and retained this level in Autumn 2008. This new order – replacing crime and immigration as main concerns – further highlights the impact of the current economic crisis on the state of public opinion.

The second trend is an increased tendency to trust in the European Union to support citizens during the economic downturn.

- ◆ As concerns over the economy and rising prices intensify, we also see that Europeans increasingly believe that decisions about these issues should be made jointly in the EU.
- ◆ There is an increased tendency in some countries to see the European Union as a protective force that can counter the negative effects of

globalisation. At the same time, there are also countries which have become more negative about the ability of the European Union to help its citizens in a globalised world. Again, views about the development of the economy seem to be the driving force behind these opinions.

Finally, in Autumn 2008 the economic ‘feel-bad factor’ has entered the personal realm, now affecting the personal well-being of Europeans.

- ◆ Although Europeans are currently positive about their personal economic situation (64% rate the financial situation of their household as good, the corresponding figure for ‘personal job situation’ is 56%), negative developments are noted for many of the personal ‘well-being’ measures: the expectation that life in general will worsen sees a further increase between Spring and Autumn 2008 (+6 points) and the difference between those who expect their situation to improve and those who expect it to worsen has dropped by 14 points.

This, in consequence, appears to make Europeans more cautious in their general attitudes.

- ◆ The consequences of the ‘feel-bad factor’ are seen in many of the indicators: the proportion of respondents who feel that things are going in the wrong direction - both nationally and in the European Union - has increased (49%; +4 points and 34%; +9 points, respectively).
- ◆ The tendency not to trust the European bodies has increased, even if this is not mirrored by a corresponding drop in trust levels. The proportion of respondents not trusting the European Commission has gone up to 30% (+3) and the corresponding figures for the European Parliament and the European Central Bank are 31% (+4 points) and 30% (+6 points), respectively.
- ◆ The positive image of the European Union overall has declined by 3 percentage points and now stands at 45%.

Yet, in this negative climate, support for EU membership and opinions of the perceived benefits of membership have remained stable since Spring 2008. The overall picture presented on this part of the report indicates an increased reliance of Europeans on the ‘collective’ force and position of the EU. This in turn imposes a responsibility on European leaders and policy-makers to reassure citizens in the current times of crisis. However, these circumstances also offer great opportunities for said leaders to leverage off the current challenges.

This Autumn 2008 Eurobarometer introduced some new topics outside the traditional European indicators: namely the conflict in Georgia, the Iron Curtain and enlargement, the European Union budget and the building of Europe. The main findings related to these themes can be summarised as follows.

The EU is seen to have played the most important role in bringing the conflict in Georgia to an end although these results are diluted by a lack of knowledge: 26% of Europeans think that the EU played the most important role. However, the majority of respondents do not know who played the most important role in ending this conflict (35%).

Europeans voice strong concerns about the impact of the Georgian conflict on Europe: the majority think that the Georgian conflict could have an impact on the security of energy supply in the EU (60%).

Overall, close to half of Europeans feel that the enlargement from 15 to 27 Member States has strengthened the European Union (48%).

Twenty years after the fall of the Iron Curtain, this symbolic border still marks a divide in public opinion: in the 12 newer Member States, the majority view is that this enlargement strengthened the EU (59%), whereas in the 15 'old' EU Member States, views are more divided (44% 'strengthened' vs. 40% 'weakened').

Two-thirds of Europeans believe that the EU has, on balance, benefited from the fall of the Iron Curtain. On average, 52% of Europeans feel that their **country has benefited** from the fall of the Iron Curtain. Just over a quarter of Europeans feel that **they themselves have benefited** (26%).

Here again, a geographical divide between the 'East' and the 'West' is noted. It is most pronounced concerning the perception that the country has benefited from the fall of the Iron Curtain (63% vs. 49% 'benefited').

Europeans continue to over-estimate the European Union's administrative overheads (26%) which is, in their opinion, the area in which most of the EU budget **is currently being spent**. Following on from this, slightly under a quarter of Europeans estimate that most of the European Union's budget is expended on 'economic growth' and 'agriculture and rural development' (24% both).

In light of the current economic crisis, and taking account of the widespread concern voiced by Europeans in this respect, it is not surprising to find that the **most popular areas on which Europeans would like the EU budget to be spent are economic growth (38%) and employment and social affairs (36%)**.

Furthermore, **Europeans regard the need to develop the EU economy and boost its growth** as the main objective of the building of Europe at the current time (23%). In this harsh economic climate, it is considered more important than improving the standard of living of Europeans (18%) or maintaining peace and stability (16%). However, **the major importance that Europeans attach to a high standard of living** should not be underestimated; improving living standards comes in first place when respondents are asked what they think *should be* the main objective in the building of Europe (23%).

Technical specifications

“STANDARD” EUROBAROMETER 70 TECHNICAL SPECIFICATIONS

Between 6 October and 6 November 2008, TNS opinion & social, a consortium created between Taylor Nelson Sofres and EOS Gallup Europe, carried out wave 70.1 of the EUROBAROMETER, at the request of the EUROPEAN COMMISSION, Directorate-General for Communication, “Research and Political Analysis”.

The “STANDARD” EUROBAROMETER 70 is part of wave 70.1 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 70 has also been conducted in the three candidate countries (Croatia, Turkey and the Former Yugoslav Republic of Macedonia) 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 resident in these countries and having 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 by 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.

ABBREVIATIONS	COUNTRIES	INSTITUTES	N° INTERVIEWS	FIELDWORK DATES		POPULATION 15+
BE	Belgium	TNS Dimarso	1.002	10/10/2008	06/11/2008	8.786.805
BG	Bulgaria	TNS BBSS	1.006	09/10/2008	20/10/2008	6.647.375
CZ	Czech Rep.	TNS Aisa	1.026	06/10/2008	22/10/2008	8.571.710
DK	Denmark	TNS Gallup DK	1.029	06/10/2008	02/11/2008	4.432.931
DE	Germany	TNS Infratest	1.526	10/10/2008	02/11/2008	64.546.096
EE	Estonia	Emor	1.000	10/10/2008	03/11/2008	887.094
EL	Greece	TNS ICAP	1.000	10/10/2008	02/11/2008	8.691.304
ES	Spain	TNS Demoscopia	1.000	09/10/2008	06/11/2008	38.536.844
FR	France	TNS Sofres	1.027	06/10/2008	31/10/2008	46.425.653
IE	Ireland	TNS MRBI	1.000	06/10/2008	31/10/2008	3.375.399
IT	Italy	TNS Infratest	1.061	08/10/2008	24/10/2008	48.892.559
CY	Rep. of Cyprus	Synovate	503	08/10/2008	02/11/2008	638.900
CY(tcc)	Turkish Cypriot Comm.	KADEM	500	07/10/2008	27/10/2008	143.226
LV	Latvia	TNS Latvia	1.002	10/10/2008	04/11/2008	1.444.884
LT	Lithuania	TNS Gallup Lithuania	1.011	09/10/2008	28/10/2008	2.846.756
LU	Luxembourg	TNS ILReS	500	06/10/2008	03/11/2008	388.914
HU	Hungary	TNS Hungary	1.002	10/10/2008	02/11/2008	8.320.614
MT	Malta	MISCO	500	09/10/2008	03/11/2008	335.476
NL	Netherlands	TNS NIPO	1.041	09/10/2008	05/11/2008	13.017.690
AT	Austria	Österreichisches Gallup-Institut	1.003	06/10/2008	28/10/2008	7.004.205
PL	Poland	TNS OBOP	1.000	11/10/2008	31/10/2008	32.155.805
PT	Portugal	TNS EUROTESTE	1.000	11/10/2008	03/11/2008	8.080.915
RO	Romania	TNS CSOP	1.053	07/10/2008	03/11/2008	18.246.731
SI	Slovenia	RM PLUS	1.006	07/10/2008	04/11/2008	1.729.298
SK	Slovakia	TNS AISA SK	1.006	09/10/2008	26/11/2008	4.316.438
FI	Finland	TNS Gallup Oy	1.004	15/10/2008	06/11/2008	4.353.495
SE	Sweden	TNS GALLUP	1.002	13/10/2008	03/11/2008	7.562.263
UK	United Kingdom	TNS UK	1.308	07/10/2008	02/11/2008	50.519.877
HR	Croatia	Puls	1.000	08/10/2008	29/10/2008	3.734.300
TR	Turkey	TNS PIAR	1.003	08/10/2008	05/11/2008	47.583.830
MK	Former Yugoslav Rep. of Macedonia	TNS Brima	1.009	07/10/2008	16/10/2008	1.648.012
TOTAL			30.130	06/10/2008	06/11/2008	453.865.399

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

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

Observed percentages	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
Confidence limits	± 1.9 points	± 2.5 points	± 2.7 points	± 3.0 points	± 3.1 points