

# EU NO, EURO YES!

## EUROPEAN PUBLIC OPINIONS FACING THE CRISIS (2007-2012)

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### SUMMARY

**Steadily consistent answers to several questions asked for Standard Eurobarometer opinion polls show that a decline in public opinion on the European Union observed since 2007 significantly worsened in 2011, bringing support to historically low levels which continue today.** Since 2010 and 2011 respectively, indicators of membership to the EU and perceived benefits of membership (for which over 25 years of uninterrupted series of results are available) are no longer included in the survey. Therefore direct comparison of current public opinion with previous instances of decline in support for the EU is not possible. Nevertheless, the extent of recent decline (following already gloomy results in 2010) suggest that **the highest level of euro gloom ever observed in the last quarter century has been or is close to being reached.** This is accompanied by expectations of economic decline among a growing percentage of respondents; there is a clear correlation between these two variables.

Despite manifold signs of decline in support (in Eurobarometer data as well as in other opinion polls conducted in individual countries), however, **the average European citizen appears to still want to believe that the European Union can take effective action to solve the crisis.** Even if the role it is viewed as having does not make it a sole actor, and though it has no doubt been somewhat eroded, this role has not collapsed. **Similarly, despite a sharp drop** (nearly ten points since spring 2011, following a comparable drop over the four preceding years), **a (slight) relative majority of citizens remains ultimately optimistic about the future of the EU.**

In this context, **the majority of Europeans still support the single currency. This majority increases significantly** (two-thirds of those polled) **in euro zone countries.** Support has fallen since 2007 and since 2010 in particular, but to a far lesser degree than in previous indicators of public opinion. **In autumn 2012, a (large or small) majority of people felt attached to the euro in every euro zone country** (with the exception of Cyprus, where favourable and unfavourable opinion is split evenly) **and at least relative majorities of people support it in Romania, Hungary and Bulgaria. The margin of support** for “a European economic and monetary union with a single currency, the euro” **is slimmer today in southern European countries most directly affected or threatened by the crisis. In all likelihood this apparent rejection is not of the euro itself but of measures currently applied to these countries within the EMU.**

**More generally, citizens in these southern European Member States, many of whom had been among the most vocal EU supporters, are expressing anxiety or disappointment in those countries where the unfavourable drop in public opinion on the EU has been the greatest** since the onset of the crisis. In autumn 2012, **the number of those pessimistic about the EU’s future outnumbered those who are optimistic** (in Spain, the latter are nearly outnumbered) – a trait they now share with traditionally eurosceptic Britons and other euro reluctant countries (Hungary, Czech Republic). French public opinion is, for the majority, also pessimistic in this regard.

**Several findings in this study would appear to confirm concerns that division lines are deepening between EU countries,** a risk addressed a few months ago in the report “Do the Europeans still believe in the EU?”.

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## INTRODUCTION: A RISE IN EURO GLOOM SINCE 2007

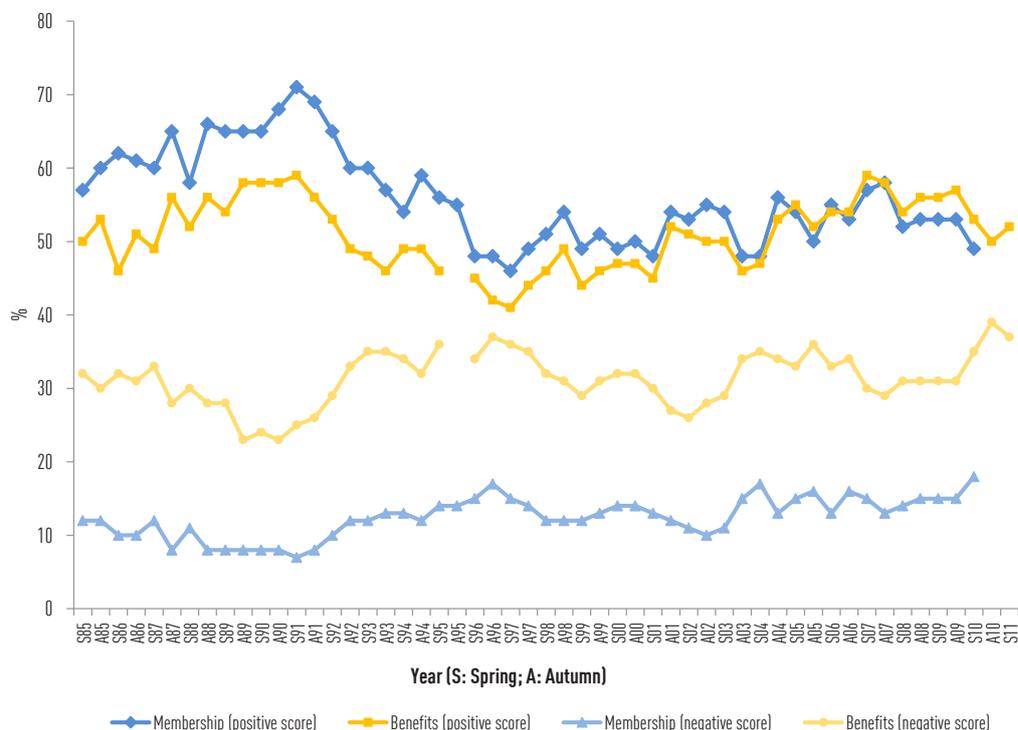
Notre Europe – Jacques Delors Institute published a report in June 2012 on trends in attitudes and expectations among European citizens with regard to the EU over a quarter of a century<sup>1</sup>.

The study is primarily based on a re-evaluation of qualitative studies conducted throughout the period in question. It does also include an initial chapter which looks at **fluctuations in two opinion indicators since 1985** that were systematically measured in each quarterly wave of Standard Eurobarometer polls – at least until recent date:

- Membership indicator<sup>2</sup> – measured until spring 2010;
- Benefit indicator<sup>3</sup> – measured until spring 2011.

It seems that the European Commission has dropped these indicators<sup>4</sup>, despite their particular usefulness as the only ones for which several decades of continuous, uninterrupted series are available.

Figure 1: Evolution of the “Membership” and “Benefits” indicators between 1985 and 2011



Source: Eurobarometer data.

An analysis of the most recent opinion trends will therefore rely on results obtained from other questions in Standard Eurobarometer polls.

1. Daniel Debomy, “Do the Europeans still believe in the EU”, *Studies and Reports No. 91, Notre Europe*, June 2012.

2. Poll question: “Generally speaking, do you think (our country’s) membership of the European Union is a good thing? A bad thing?, Neither good nor bad? Don’t know”.

3. Poll question: “Taking everything into account, would you say that (our country) has on balance benefitted or not from being a member of the European Union? Benefitted; Not benefitted”.

4. For reasons that, to our knowledge, have yet to be explained. On this topic, see Salvatore Signorelli, “The EU and Public Opinions: A love-hate relationship?”, *Studies and Reports No. 93, Notre Europe – Jacques Delors Institute*, November 2012.

Before going any further, a very short summary follows of **trends in average European scores on the aforementioned two indicators** until they were recently dropped.

- After a sharp decline from 1991 (record high in spring of that year) to 1997 (all-time low recorded in spring wave poll), both indicators improved somewhat in a slow, up-and-down manner until the autumn of 2007.
- Subsequent to initial effects of the crisis, the first indicator (membership) plunged 6 points in the next wave and remained one point higher for the three waves that followed. It then fell again by 4 points; as of spring 2010, 49% had a favourable opinion while 18% had an unfavourable one (the opinions of 29% of respondents were mitigated (“neither good nor bad”).
- The second indicator (benefits) fluctuated over the next two years (dipping slightly before returning to previous levels and even gaining one point in autumn 2009) before dropping 7 points in two waves and rising again by 2 points in the spring of 2011, at which point 52% of those polled had a favourable opinion (versus 37% unfavourable).

**The slump which appeared from 2007 onwards was substantial.**

**Until a year ago, however, it remained relatively limited, all things considered, given the depth of the crisis and the inability of the European Union to solve it.**

While these results fall quite short of the apex of euro popularity reached around 1990, euro gloom was not at the highest level it has been in the last two decades.

By looking at the findings of qualitative studies, **the report also highlighted ongoing high expectations of the Union despite growing concerns.**

**The appearance of worrying dividing lines between Europeans, however, would also indicate a risk of attitudes toward the EU worsening even further.**

**To study the most recent trends** in general attitudes towards the European Union, answers to several questions asked of late in Standard Eurobarometer polls must be analysed. Questions that specifically address the crisis and the euro should be examined in order to assess the impact of the crisis on public opinion.

**Three types of factors** are involved:

- How the EU is perceived in general;
- Perceptions of the crisis, management of it and its impact on the future of the EU;
- Attitudes towards the euro.

# 1. Trends in public opinion on the EU: overall drop of support (more or less acute depending on country)

## 1.1. A clear increase in overall disappointment in the EU (trust – image – direction)

### 1.1.1. Trust in the European Union

**One question in the Standard Eurobarometer poll asks about trust in the European Union<sup>5</sup>.**

This is one of the questions that have been asked for several years. Answers to it can be tracked from the 2004 enlargement of the Union.

During this period, the **proportion of positive answers peaked in 2007** (in spring) at 57% (versus 32%).

This score **then slumped** in two phases until spring of 2011; falling to between 47 and 50% until autumn 2009 and then to around 42% in 2010 and in **spring 2011**.

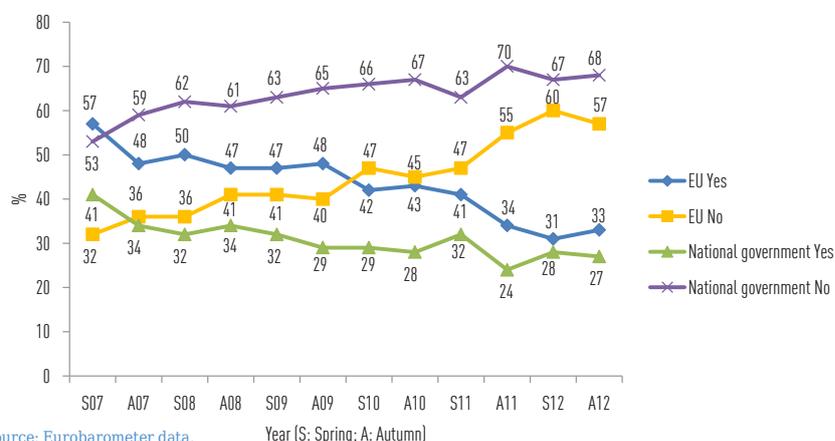
Such a shift is more or less comparable to the one observed with the two fundamental indicators discussed in the introduction.

Since then, **trust in the EU significantly weakened again** in autumn 2011 (34% positive answers versus 55% negative), and fell by an additional 3 points in spring 2012 (31% versus 60%) 2 of which were regained in the autumn (33% versus 57%).

**Nearly two-thirds of Europeans who answered this question currently express a lack of trust in the EU.**

**The fact that responses to similar questions regarding national governments are even more negative indicates a correlation between both trends, but EU results remain especially worrying all the same.** For that matter, respondents have always been highly negative towards national authorities throughout the period in question, unlike the EU, which until 2009 was trusted by at least a relative majority. The “comparative advantage” of the EU has therefore sharply declined.

Figure 2: Trust in the European Union and in the respondent's national government



Source: Eurobarometer data.

Year (S: Spring; A: Autumn)

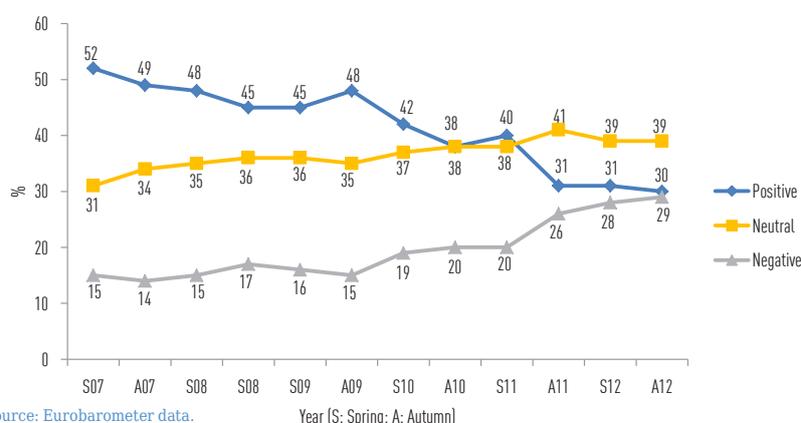
5. Poll question: "I would like to ask you a question about how much trust you have in certain institutions. For each of the following institutions, please tell me if you tend to trust it or tend not to trust it?" (Question asked about the European Union but also about national and international political institutions).

### 1.1.2. Image of the European Union

People interviewed for the Eurobarometer survey were also asked what image they had of the EU<sup>6</sup>.

The proportion of positive answers to this question, too, fell between 2007 (52% in the spring versus 15% negative answers) and the spring of 2011 (40% versus 20%)<sup>7</sup>; also comparable to the previous question, 6 months later numbers plummeted (31% versus 26%), and had not improved by spring (31% versus 28%) or autumn 2012 (30% versus 29% - 39% of those polled had a 'neutral' image of the EU and 2% did not respond).

Figure 3: Image of the EU



Source: Eurobarometer data.

### 1.1.3. Direction taken by the European Union

Another sign of mounting discontent appears in opinions expressed on whether the European Union is currently taking the right or wrong direction - responses can be compared with those given regarding one's own country<sup>8</sup>.

- In 2007 (autumn wave), 40% of Europeans thought things were headed in the right direction in the EU (23% didn't). This margin had not changed 6 months later (42% versus 25%).

Public opinion on this subject progressively worsened until spring 2011<sup>9</sup>, at which time 31% of respondents were optimistic and 40% were not.

A notable decline occurred in the autumn 2011 wave - 19% versus 55% - followed by marginal improvements in spring and autumn 2012: 21% believed it was taking the right direction in spring, 22% believed so in autumn; 53% and 52% saw it taking the wrong direction, respectively.

- At the same time, the percentage of positive responses to trends in the respondents' own countries also fell between autumn 2007 (34% versus 41%) and spring 2011 (28% versus 51%)<sup>10</sup>. The decline worsened the following autumn (21% versus 58%). Results improved in spring 2012 (27% versus 51%), but slumped again in the fall (24% versus 56%).

6. Poll question: "In general, does the European Union conjure up for you a very positive, fairly positive, neutral, fairly negative or very negative image?"

7. With a bright spell noted, however, in 2009.

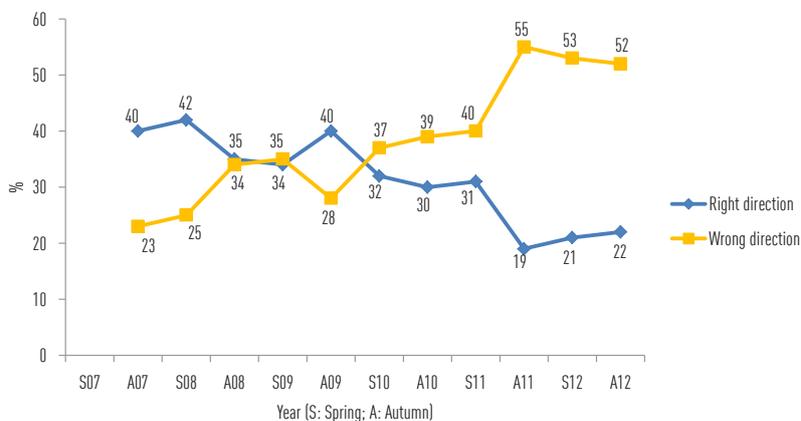
8. Poll question: "At the present time, would you say that, in general, things are going in the right direction or the wrong direction? In the European Union? In (our country)..."

9. With only a short-lived improvement in autumn 2009.

10. With a similar short-lived improvement in autumn 2009.

The downturn is more perceptible at the European level than the national one, reflecting a certain shift in public opinion towards national – and at time nationalist – solutions.

Figure 4: Direction taken by the EU



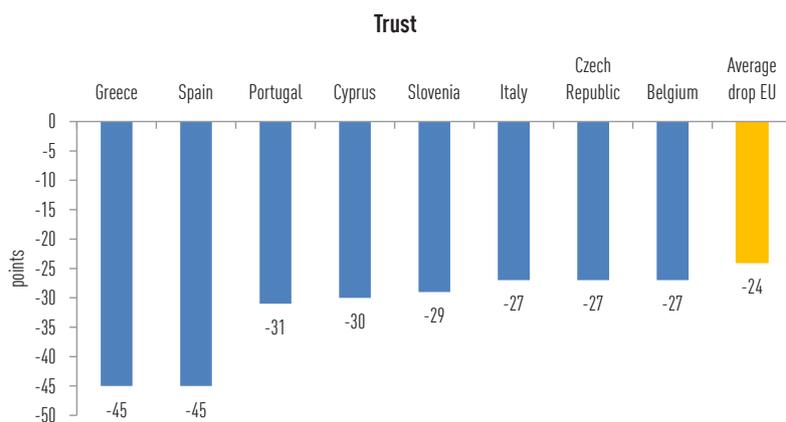
Source: Eurobarometer data.

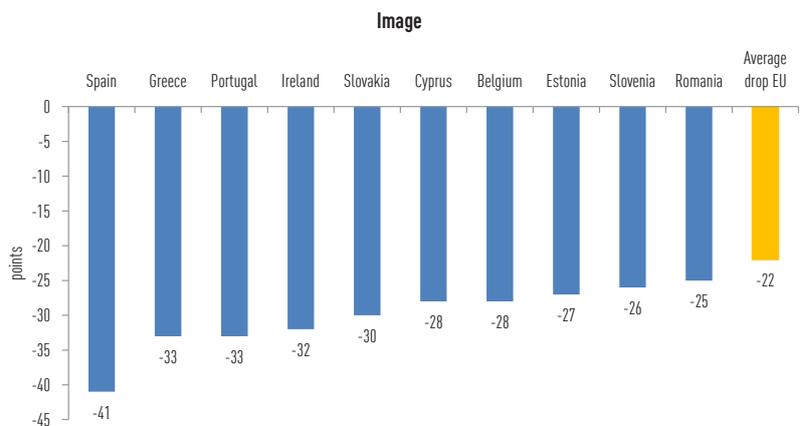
## 1.2. Disparities in shrinking pro-EU opinion: a modified classification of euro popularity and euroscepticism

### 1.2.1. EU less and less popular in certain countries

Figure 5 shows the countries where euro popularity has decreased the most from the spring of 2007 to autumn 2012 and indicates the scope of the decline in positive answers to questions regarding trust in the EU, EU image and whether the Union is taking the right or wrong direction.

Figure 5: Sharp decline in pro-EU opinion in several countries (2007-2012)





Source: Eurobarometer data

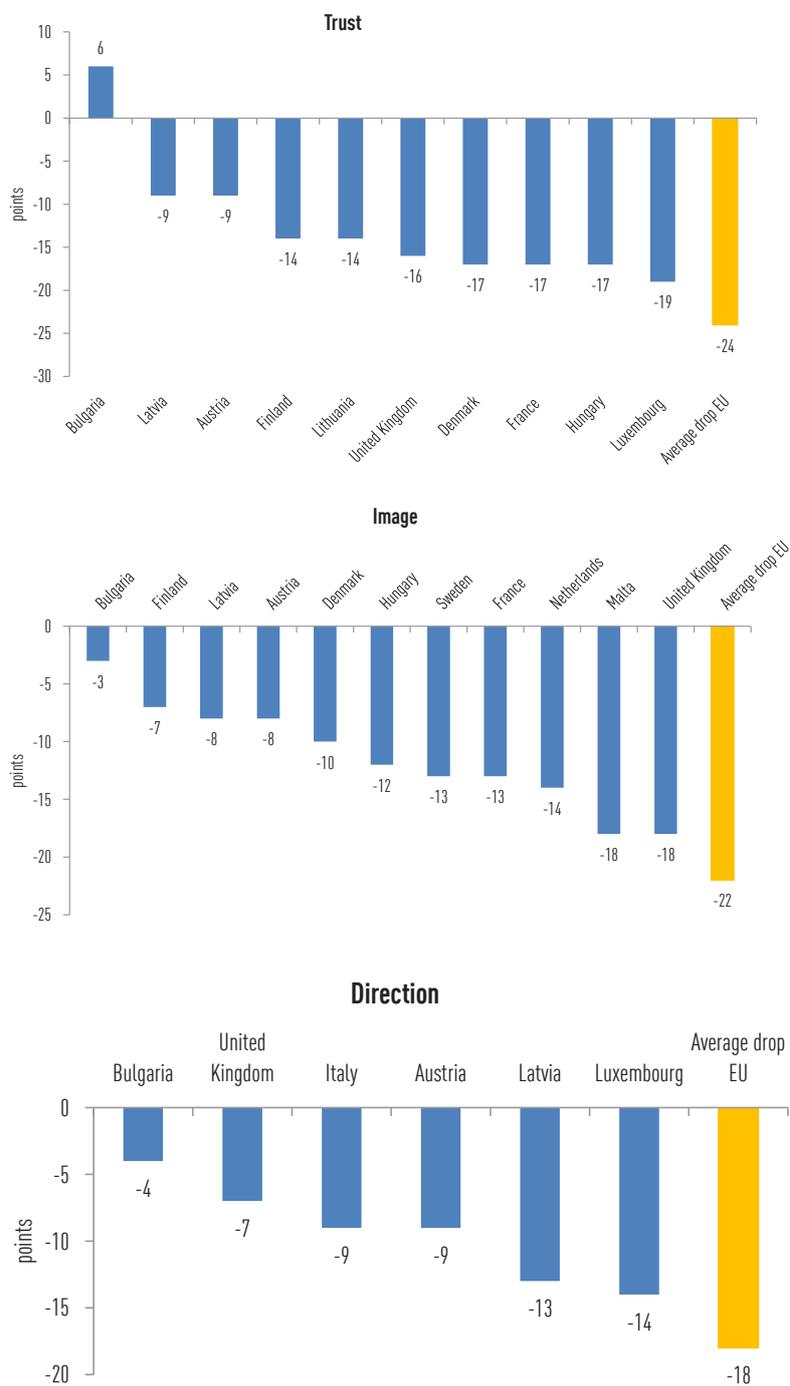
**Among the Member States where the decline in public opinion has been greatest are southern European countries which have been especially affected by the crisis: Greece, Spain, Portugal and Cyprus.**

In **Italy and Ireland** as well, negative public opinion has increased at rates above the EU average, but signs of improvement appeared in the most recent wave of the survey.

**The situation varies in other countries:** older and newer Member States that are traditionally pro-EU (Belgium, Slovenia, Slovakia, Romania), ambivalent (Estonia) or 'euro reluctant' (Czech Republic).

Countries where positive answers have decreased at below-average rates include (from slightest drop to largest) Bulgaria followed by Austria, Latvia, United Kingdom (where, for completely different reasons the EU was already particularly unpopular), Finland, Denmark, Hungary, France and Luxembourg.

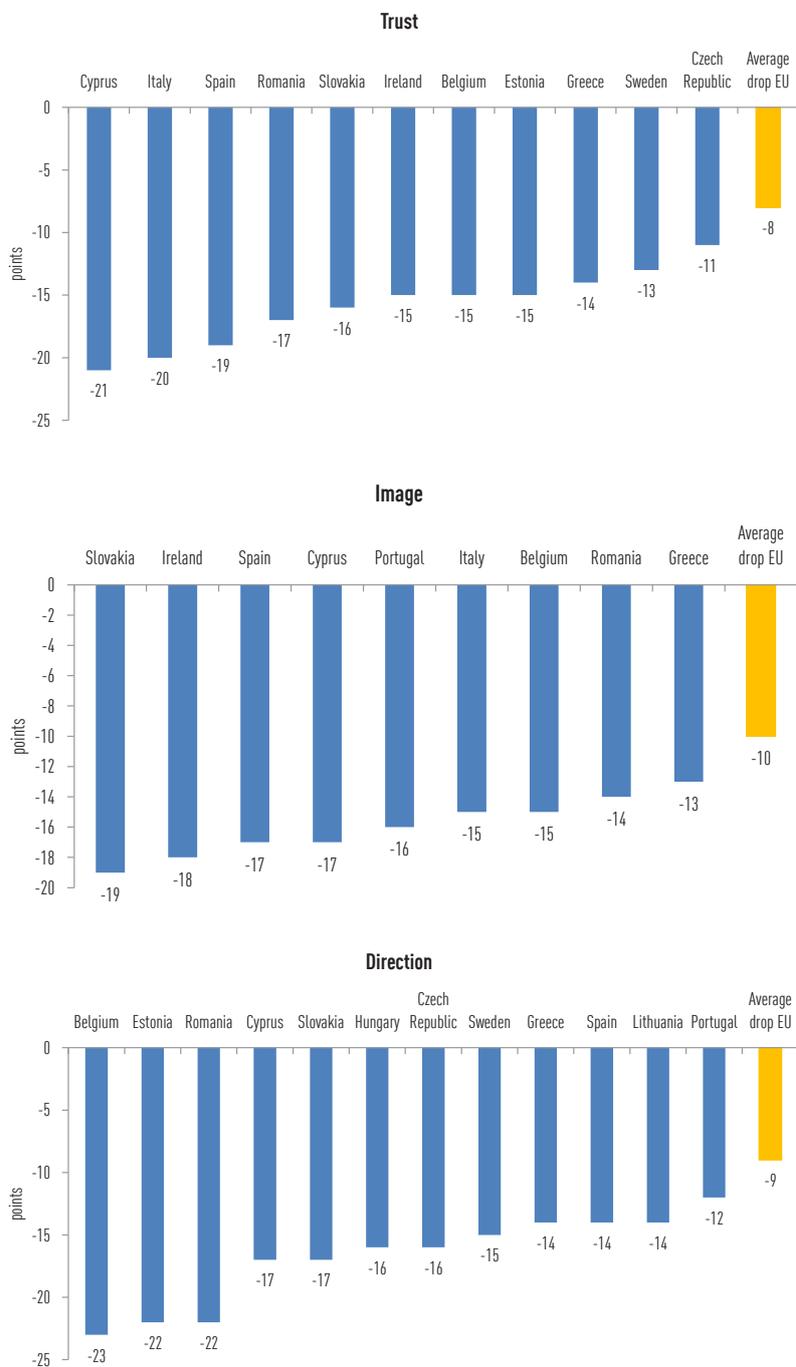
Figure 6: A more limited downturn in perception of EU in certain countries



Source: Eurobarometer data.

Figure 7 illustrates a downwards trend on the same subjects in the most recent period (spring 2011 to autumn 2012).

Figure 7: Countries where pro-EU opinion has fallen most sharply (spring 2011 to autumn 2012)



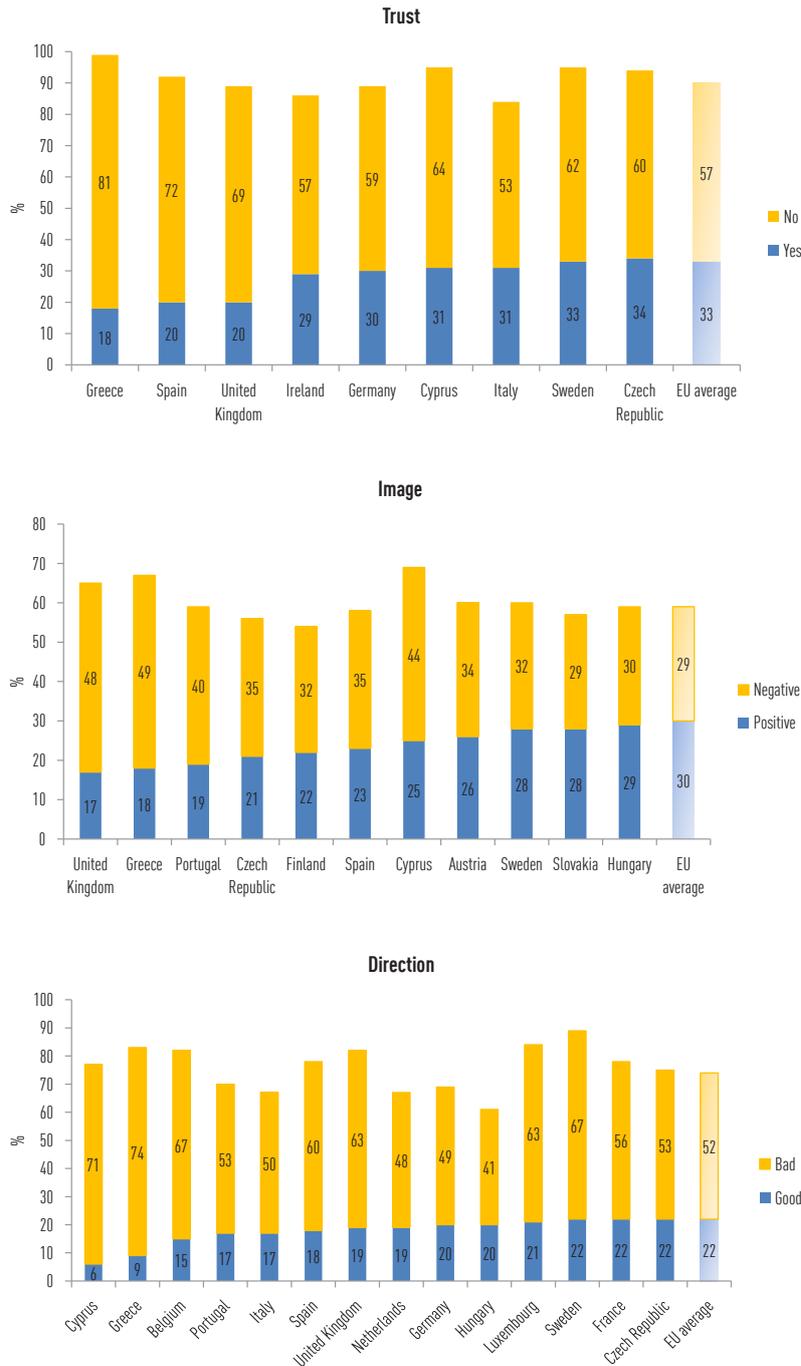
Source: Eurobarometer data.

Results reveal a **further backslide in public opinion from early 2011 onwards in old Member States of the South of Europe and Cyprus, in Ireland to a lesser degree, as well as in several central and eastern EU Member States** where, initially, pro-EU opinion was more or less high (Slovakia, Romania, Estonia, Czech Republic) **and** - to a surprising degree - **in Belgium**.

### 1.2.2. Overview of euroscepticism in autumn 2012: spread to the south

The following **overview of euroscepticism** depicts the situation in **autumn 2012** for each of the three opinion indicators:

Figure 8: Countries where a majority of respondents have a negative perception of the EU (fall 2012)

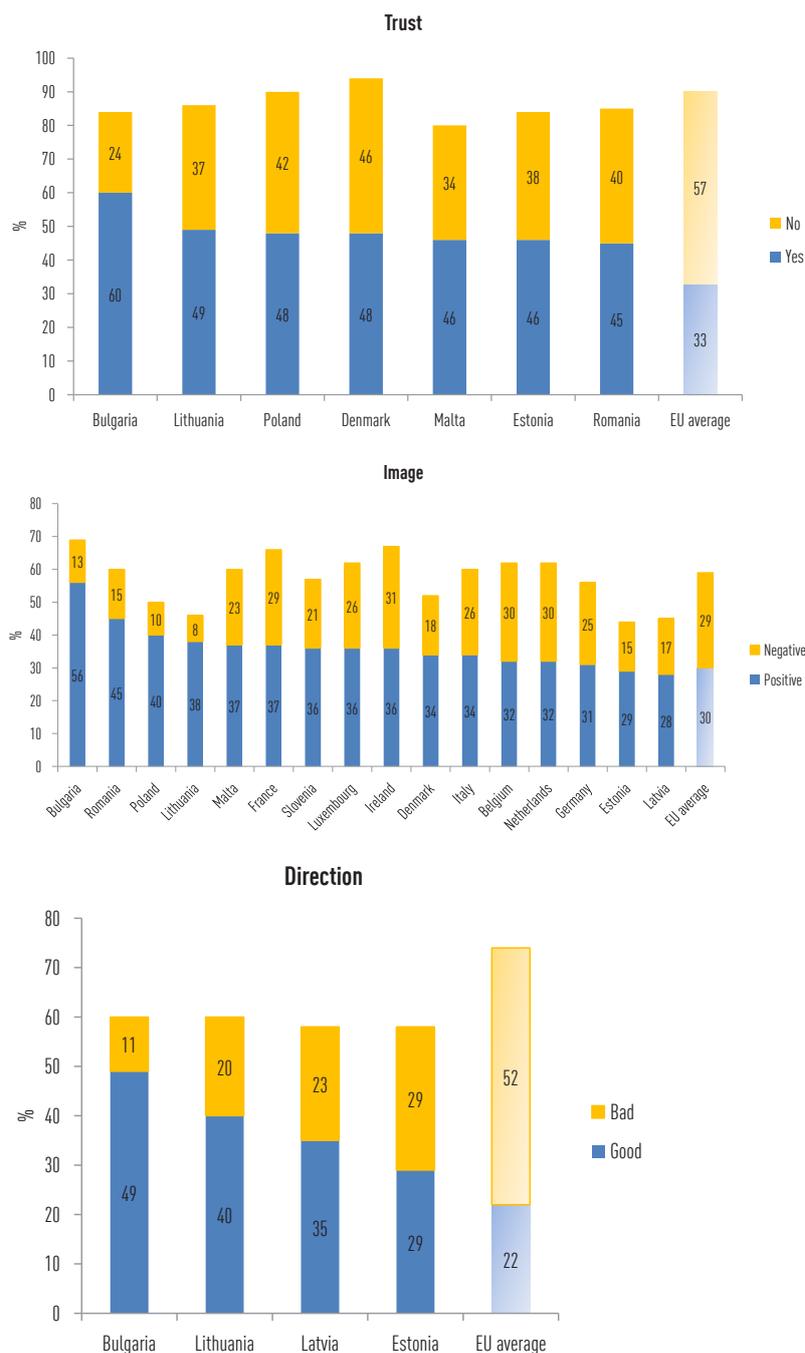


Source: Eurobarometer data.

In addition to the systematic euro rejection of the British, the euro defiance of the Czechs, Hungarians and Austrians and the euro reservations of the Swedish, the Union's ranks of the disillusioned now include citizens from southern European countries, which were particularly pro-EU and recognised the benefits of membership until not long ago.

Likewise, the indicators also reveal a sense of gloom among citizens of other older Member States (including founding members) and new ones. It should be noted, however, that in several countries, pro-EU scores are still relatively high.

Figure 9: Countries where a majority of respondents has a positive perception of the EU (fall 2012)



Source: Eurobarometer data.

- With respect to the **question on trust**, the only Member State in which an absolute majority of respondents expressed trust in the EU today is Bulgaria (60% versus 24%) – a country only prudently pro-EU before but where the advantages of Union membership seem to be increasingly recognised.

Clear, relative majorities are observed in countries like Lithuania (49% versus 37%), Poland (48% versus 42%), Malta (46% versus 34%), Estonia (46% versus 38%) and Romania (45% versus 40%); a weaker majority exists in Denmark (48% versus 46%).

In all other Member States, the balance is negative – more so in those listed in the Figure 9.

- With respect to the **question on having a positive or negative image of the EU**, Bulgaria is once again the only country where an absolute majority of citizens has a positive image of the Union (56% versus 13%).

After Bulgaria follows<sup>11</sup>: Romania (42% versus 15%), Poland (40% versus 10%), Lithuania (38% versus 8%), Slovenia (36% versus 21%), Malta (37% versus 23%), France (37% versus 29%), Luxembourg (36% versus 26%), Ireland (36% versus 31%), Denmark (34% versus 18%), Italy (34% versus 26%), Belgium (32% versus 30%), Netherlands (32% versus 30%), Germany (31% versus 25%), Estonia (29% versus 15%) and Latvia (28% versus 17%).

In other countries (cf Figure 8), the balance of positive and negative answers is negative.

- With respect to the **question on whether the EU is taking the right or wrong direction**, a relative majority of citizens in three Member States feel the direction taken is the right one: Bulgaria (49% versus 11%), Latvia (35% versus 23% – an outcome indicative of an improvement in perceptions of the EU in this country) and Lithuania (40% versus 20%). Positive scores equal negative scores in Estonia (29% versus 29%).

The balance is heavily negative in Cyprus (6% versus 71%), Greece (9% versus 74%), Belgium (15% versus 67%), Sweden (22% versus 67%), United Kingdom (19% versus 63%), Spain (18% versus 60%), Luxembourg (21% versus 63%), Portugal (17% versus 53%), Italy (17% versus 50%), France (22% versus 56%), Czech Republic (22% versus 53%), Finland (25% versus 60%) and Denmark (31% versus 53%).

A lower proportion of respondents were critical in Poland (38% versus 43%) and Romania (30% versus 34%).

## 2. Perceptions of the crisis, management of it and the future of the EU: overall mounting gloom

An obvious link is observed between rising euroscepticism and crisis-related fears: as public support for the EU has weakened, the percentage of citizens who are pessimistic about what the near future holds for Europe's economy has increased<sup>12</sup>.

11. Ranked according to both positive scores and the gap between positive and negative scores.

12. Poll question: "What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?" (The question is asked about the economic situation in their country and in the EU and about the financial health of their household).

## 2.1. Economic outlook: a new downturn expected

### 2.1.1. Public opinion trends in the EU27: generalised ongoing decline in 2011

- With respect to **expectations for the country's economic situation**, 2007 marked a drop in the pessimism of previous years. In spring 2007, the number of respondents who thought the next twelve months would be better (28%) was almost equal to those who predicted things would be worse (27%). (Another 38% said things would be the "same").

**This indicator fell sharply in 2008** (15% optimistic versus 51% pessimistic as at autumn), **rose again until spring 2011**, at which point optimists were only slightly outnumbered by pessimists (23% versus 28%), **before plummeting once again**.

By the fall, only 16% of those surveyed had hopes for a better year, whereas 44% believed the opposite.

**In 2012, a slight improvement was observed in the spring** (19% responded positively, 37% negatively). **This faded in the fall, however**, (17% versus 40%) **with a clear tendency toward pessimism predominating**.

- Answers to the same question in terms of **the economic situation in the EU over the next 12 months** followed a similar pattern.

In 2007, optimists outweighed pessimists (28% to 16% in the spring; 38% believed the situation would remain stable).

**In 2008, the balance changed significantly** (16% versus 41% in the fall). **A clear improvement occurred in 2009** (30% versus 21% in the fall) **followed by a dip in 2010 and early 2011** (21% versus 25% in the spring).

**The same sharp drop observed in attitudes towards the national economy was seen in autumn 2011** (16% of respondents were optimistic; 44% were pessimistic), **followed by a slight decrease in pessimism in spring 2012** (17% versus 39%), **and the next autumn** (16% versus 39%).

Generally speaking, **the trend has been a little more negative for Europe than for the national states**.

- Answers to a more specific question about the crisis confirm that perceptions of the situation had **dramatically worsened by autumn 2011**<sup>13</sup>.

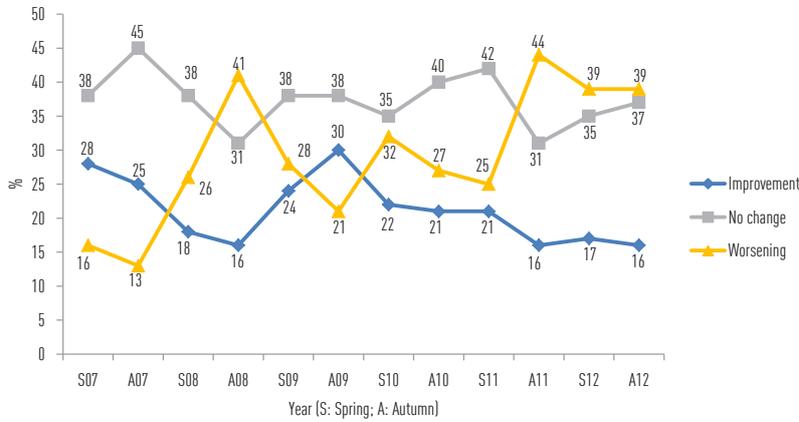
From spring 2009 to spring 2011, the percentage of those who believed "the worst was still to come" on the **job market** steadily declined from 61% (28% were optimistic) to 47% (43% were optimistic).

**By autumn 2011, the percentage of those who were pessimistic had jumped by over 20 points** (68% versus 23%) **and, despite improvements, still represented a large majority in the spring** (60% versus 30%) **and fall of 2012** (62% versus 29%)<sup>14</sup>.

13. Poll question (asked since spring 2009): "Some analysts say that the impact of the economic crisis on the job market has already reached its peak and things will recover little by little; others, on the contrary, say that the worst is still to come. Which of the two statements is closer to your opinion?"

14. In another question, unemployment was identified as the most important problem to be addressed in their country, before a dozen other problems including the "economic situation".

Figure 10: Expectations for the economic situation in the EU



Source: Eurobarometer data.

### 2.1.2. Country-specific data: varying degrees of pessimism

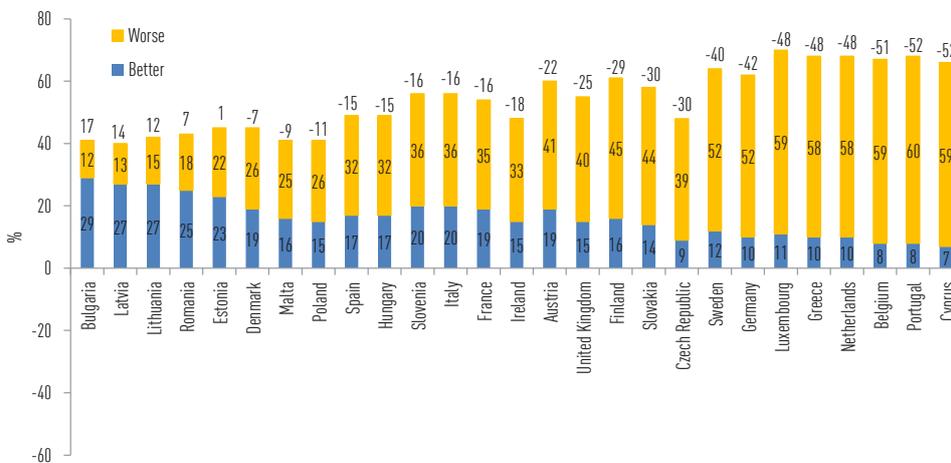
As of autumn 2012, in no Member State does the majority of those polled dare to believe that the economic situation of the EU will improve in the next twelve months.

At most, less than 30% are optimistic (in comparison, 50% or more of respondents were pessimistic in several countries).

The number of intermediary responses (“no change”) and those who did not respond (37% plus 8% – an EU average of 45% indeterminate answers), which was noteworthy everywhere and extremely high (between 30% and 60%) in certain countries, reflects an understandable inability to predict how things will evolve.

In this general context, **there are, however, considerable differences between countries which express a very careful relative optimism and those which predict that the twelve months to follow will be particularly stormy.** This is illustrated in Figure 11.

Figure 11: Economic situation of the EU (+12 months)



Source: Eurobarometer data.

The most pessimistic respondents, in this regard, are:

- **Citizens of southern European countries seriously affected by the crisis who do not expect any improvement in the year to follow: Portugal, Cyprus and Greece.**

(Although pessimistic for the most part, like many Europeans, **Spanish and Irish respondents** are less critical. So are **Italian respondents**, who have become slightly more optimistic in autumn than in spring 2012).

- **Citizens of north-western European countries which are “potential creditors” in the euro zone: Netherlands, Germany and Finland**, as well as **Belgium, Luxembourg and Austria**, where opinions on this subject have taken a turn for the worse in the last six months.
- **Citizens of traditionally eurosceptic or euro reserved countries, including Sweden, United Kingdom, and Czech Republic in particular.**
- **Citizens of Slovakia**, a new addition to the euro gloom roster.

These results indicate a **contrasted landscape**.

On the contrary, a **tendency towards optimism rather than the opposite** – along with a majority of indeterminate responses – is observed in five new Member States: Bulgaria and Romania, which joined most recently, and the Baltic states.

Overall, a comparison of the ranking of Member States in this Figure with the overview of euroscepticism in section 1.2 highlights a certain correlation between the two factors: often, Member States with the worst general perception of the EU are also highly pessimistic about the 12-month economic outlook for the EU (and inversely). This correlation is not absolute, however.

This observation raises the question of whether perceptions of the EU would “mechanically” improve if the economic outlook did likewise. It would be unwise, however, to attempt to answer this question using only the data available here.

## 2.2. Taking action against the crisis: no improvement in the credibility of the EU, a will to hope against all odds

The question that asked who can best resolve the crisis produced the following answers<sup>15</sup>.

### 2.2.1. Public opinion trends in the EU27: EU expected to take action but not only action

**In the autumn 2012 wave, the EU is cited by 23% of respondents**, ahead of the national government (20%), the G20 (14%), the IMF (13%) and the United States, in last position (8%).

Trends in answers given since spring 2009 **are largely stable with the exception of a few changes**.

- The United States, cited at the outset by 16% of respondents, has lost ground since. From spring 2010 onwards, it has been cited by only 5-8% of those polled.

<sup>15</sup> Poll question (asked since spring 2009): “In your opinion, which of the following is best able to take effective actions against the effects of the financial and economic crisis?” (Single answer – either: EU, national government, IMF, G20, the United States – plus other possibilities).

- The same has happened to the G20 (though to a lesser degree): 20% cited it in the first study, but only between 14-16% from spring 2010 onwards.
- The score of the IMF has remained relatively stable at 13-15% (aside from a temporary decrease to 11% in autumn 2009).
- **The European Union has always been the most popular answer - but has not taken clear precedence over other institutions.**

**Its first score of 21% initially rose to 26% in spring 2010.**

**It then tended to fall; by spring 2012 it was back to 21% before climbing 2 points in autumn.**

- The national government, an unpopular choice the first time the question was asked (12%), achieved a score of 19% six months later before rising another 2 points and matching the score of the EU by spring 2012. Its score fell slightly to 20% in autumn 2012.

In summary, while **citizens continue to believe that the European Union contributes to solving the crisis**, it is far from being the only actor and **the significance of its role has not tended to expand since this question became a part of the survey.**

The most recent Standard Eurobarometer polls include a question in appearance similar to a question discussed above about the **right or wrong direction taken by the EU. The new question specifies “to exit the crisis and face the world new challenges”<sup>16</sup>.**

**In the autumn 2012 wave, 41% of respondents said the EU had taken “the right direction” and 32% said “the wrong direction”<sup>17</sup>** - whereas answers to the previous question about the direction taken by the EU “in general” reflected considerably gloomier attitudes (as mentioned above, 22% versus 52%).

This new question immediately followed a series of other questions which sought the opinion of those polled on EU 2020 Strategy targets - unknown to them before the interview.

Predictably, the presentation of these targets as EU priorities (which one can hardly disagree with) had a positive effect on the **latter data, which therefore must be examined with great caution.**

That said, **the result does show that despite increasing levels of pessimism, citizens still want to hope the EU will find a way out of the crisis.**

### 2.2.2. Considerable differences in how Member States view the EU as an actor in the fight against the crisis

As mentioned above, in autumn 2012, 23% of Europeans chose the EU as the actor best placed to take effective action against the crisis, ahead of their national government<sup>18</sup>.

- The following nationalities are **particularly inclined to choose the EU**: the Polish (36%), Luxembourgers (31%), Bulgarians (31%), Maltese (31%), Greeks (30%), Spanish (28%), Irish (28%), Slovenians (27%), Italians (26%), Portuguese (25%), French (25%) and Belgians (25%). **The list includes both older and new Member States in the euro zone and new Members States which are not yet euro zone countries.**

16. Poll question: “Having heard about the priorities of the EU, do you think that the EU is going in the right direction or in the wrong direction to exit the crisis and face the world new challenges? In the right direction; In the wrong direction; Neither the one or the other.”

17. 20% chose “Neither the one or the other” and 9% did not provide an answer.

18. Other possible answers: IMF, G20 and the United States.

It also includes many of the countries most affected by the crisis, despite their growing euro gloom.

- **Inversely, those who choose the EU the least frequently are citizens from the three older Member States which have not adopted the euro and the Czech Republic.**

Response patterns vary, however, between these countries.

The British, very few of whom (10%) cite the EU, in contrast frequently cite their national government (37%)<sup>19</sup>.

Swedish respondents cite the EU less than the average (14%) and also cite their government more frequently than others (25%), while the Danish cite both of these less frequently (18% and 8% respectively), preferring international institutions like the IMF (20%) and the G20 (27%), as well as the United States (20%) instead.

Czech citizens express great doubts about the abilities of both their government and the EU: only 3% and 9% thought these were best suited, respectively. They have an overwhelming preference for the G20 (42%) and, to a greater degree than the others, the United States (18%).

- **A clear downward trend is observed since spring 2011 in the score of the EU in certain countries:** -9 points in Estonia, -6 points in Slovakia, -4 points in Belgium, Greece and Czech Republic.
- **Inversely, its score has improved** in France (+7 points), Malta (+6 points), Denmark (+4 points) and Slovenia (+4 points).

## 2.3. Outlook for the future of the EU

### 2.3.1. Public opinion trends in the EU27: decline in optimism, now expressed by a weak majority

**In the spring 2007 wave, a question about future prospects for the EU<sup>20</sup> garnered optimistic answers from 69% of respondents, (24% were pessimistic).**

**The percentage of optimistic respondents fell to 58% versus 36% by spring 2011 and dropped sharply by 10 points in autumn 2011 to 48% versus 46%. It rose slightly in 2012 (49% versus 46% in the spring and 50% versus 45% in the autumn).**

**The very large majority previously observed has dwindled to a weak relative majority.**

### 2.3.2. Optimism or pessimism about the future of the EU: southern Europeans now among the most gloomy alongside citizens from traditionally “euro-defiant” countries

**In the following countries in autumn 2012, more citizens were pessimistic than optimistic:**

- Southern Europe: **Greece** (27% optimists, 71% pessimists), **Portugal** (28% versus 64%), **Cyprus** (36% versus 59%), **Italy** (45% versus 47%) as well as **France** (44% versus 52%).

19. The only citizens to cite their national government more are Romanians (49%) – who do so, no doubt, as a demand for government action rather than to express great confidence in its ability to succeed.

20. Poll question: “Would you say that you are very optimistic, fairly optimistic, fairly pessimistic or very pessimistic about the future of the EU?”.

- Elsewhere: **Hungary** (38% versus 57%), **Czech Republic** (42% versus 56%), **as well as the UK, a traditionally eurosceptic nation** (38% versus 56%).

**In two countries, a slight relative majority of respondents was optimistic:** Austria and Spain (the score in the latter is a slight improvement on spring results, when a minority of those polled were optimistic).

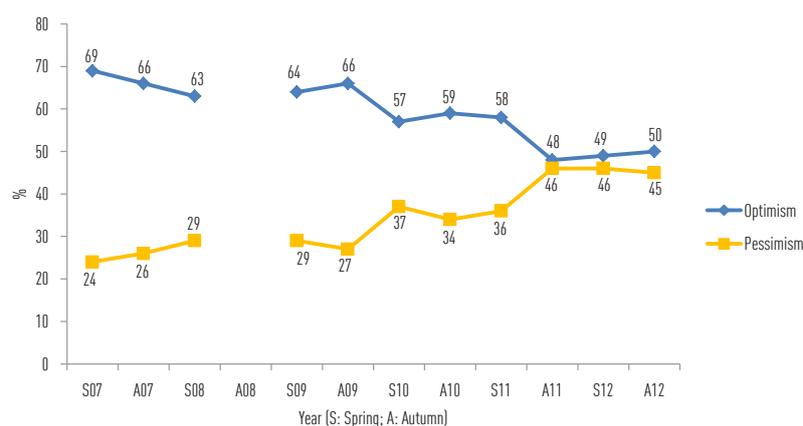
**A majority of those polled remain optimistic about the future in the other countries, however:**

- Denmark, where 72% are optimistic and only 25% pessimistic (this is a country where the reservations of the past have gradually dwindled but where optimism prevails at surprising levels nonetheless), Poland (66% versus 26%) (a very euro-worried country when it joined the Union but a confirmed euro fan today), Lithuania (65% versus 28%) (which has a traditionally favourable view of the EU), Bulgaria (64% versus 27%) (a clear improvement on an initially cautious outlook), Romania (61% versus 33%) (a country more than inclined to imagine a happier future), Estonia (61% versus 36%) (formerly cautious but now pro-EU), Netherlands (61% versus 38%) and Malta (60% versus 28%).
- Next are countries where 55% to 59%<sup>21</sup> of respondents are optimistic: Ireland, Luxembourg, Latvia, Finland, Germany and Slovenia.
- In Belgium, Sweden and Slovakia, between 50% and 54% of those polled see better things in the future.

Trends in this indicator show that between **spring 2007 and autumn 2012, optimism about the future of the EU contracted in all countries, albeit to widely varying degrees.**

- **It fell most sharply in Greece and Cyprus (-34), Portugal (-29), Spain (-26), Slovenia (-25), Slovakia (-25), Czech Republic (-24) and in Italy (-23).**
- **It decreased the least in Bulgaria (-2), Latvia (-3), Denmark (-5), Austria (-5), Finland (-5), Lithuania (-9) and in Malta (-9).**

Figure 12: Optimism or pessimism about the future of the EU



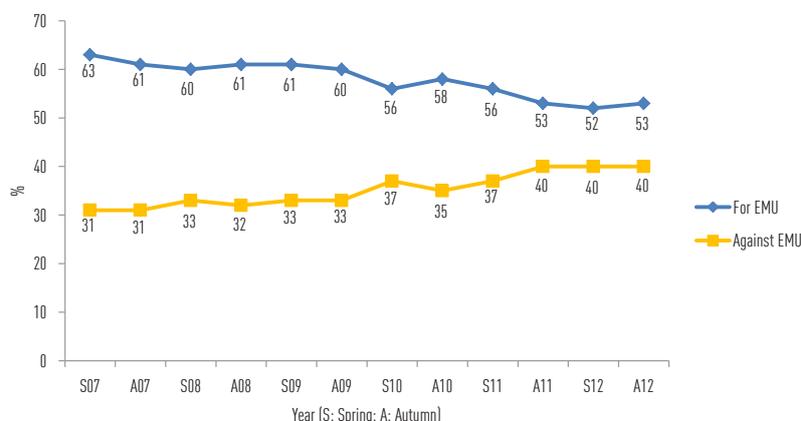
Source: Eurobarometer data.

21. Countries listed from most to least optimistic.

### 3. Attitudes toward the euro: attachment on the decline but still expressed by majority

Given the euro gloom which prevailed at the end of 2012, it is surprising to note that the single currency is still supported by a majority of EU citizens and by a large majority (**two-thirds**) in euro zone countries. This support has indeed diminished between 2007 and 2010 and then since 2010, but to a clearly lesser extent than in previous opinion indicators.

Figure 13: Euro still supported by a majority of respondents



#### 3.1. Public opinion trends in the EU27. Fewer, but most citizens still support the euro

Considering the EU average, a majority of citizens still supports the euro **despite a gradual drop in positive answers over the last five years**<sup>22</sup>.

From a **peak in spring 2007 (wherein 63% expressed support and 31% the opposite)**, support for the EMU and the euro faded until autumn 2009 (60% versus 33%), before falling more swiftly until autumn 2011. Average public opinion remained stable throughout 2012 (an average score across the EU27 of 53% versus 40% was observed in autumn 2012).

**Within the euro zone, support for the euro is 13 points higher: 66% of respondents;** Figure 14 demonstrates that support is expressed by a (smaller or larger) majority in nearly every euro zone country.

#### 3.2. Definite majority support in euro zone countries

##### 3.2.1. Situation in 2012: majority support, often by a decidedly clear margin

In autumn 2012, the proposal calling for a “European economic monetary union with one single currency, the euro” was approved **by 70 to over 80% of respondents in five euro zone countries**<sup>23</sup>: Slovenia, Finland, Netherlands, Luxembourg and Slovakia.

22. Poll question: “What is your opinion on each of the following proposals? Please tell me for each proposal, whether you are for it or against it...” (Among the statements is: “A European economic monetary union with one single currency, the euro”).

23. Countries listed from highest to lowest levels of support.

Likewise, roughly **70% of respondents in France, Belgium, Germany and Estonia expressed approval, while 65% or more did in Ireland, Austria and Greece, and nearly 65% in Malta and Spain.**

**In the other euro zone countries, a less impressive but confirmed majority was also observed<sup>23</sup> in Italy and Portugal** - Cyprus, where responses were split evenly, was somewhat of an exception.

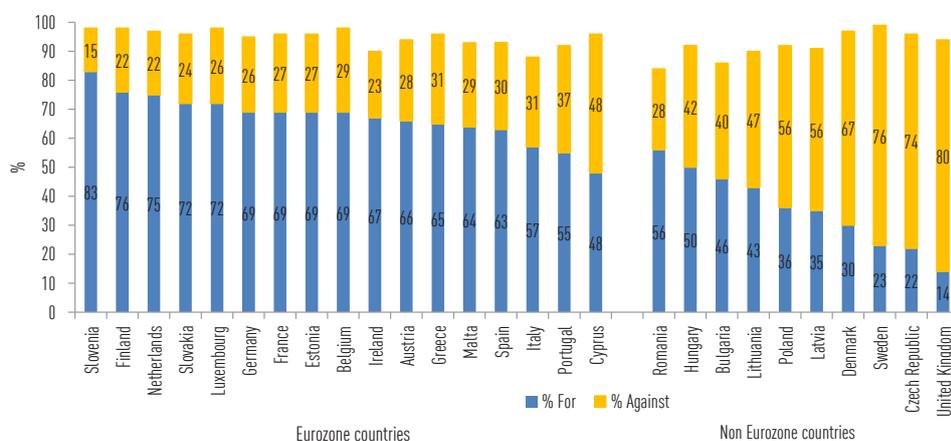
Countries often presented as being increasingly reticent towards the EMU and the solidarity it involves actually rank among the most supportive of the euro, along with certain countries which have been severely affected by the crisis.

### 3.2.2. 2007-2012 trends: downturn in certain countries, improvement in a few others

**In 2012, support for the euro still predominates in euro zone countries, although a notable decline has occurred in some of those countries since the onset of the crisis.** Between spring 2007 and autumn 2012, support fell by 21 points in Ireland, 15 points in Belgium, 10 points in Italy, 9 points in Luxembourg and 8 in Slovenia.

**The reverse, in which support for the single currency increased, occurred in other countries.** Over the same period it leaped in Greece (+ 18 points - and even +28 points by spring 2012 - as though Greek respondents, under threat of being expelled from the euro zone, were expressing a firm commitment to remaining a member despite harbouring serious concerns), +18 points in Estonia, +3 in Slovakia (results were stable in Malta).

Figure 14: Attitudes toward a European economic monetary union with a single currency, the euro



Source: Eurobarometer data.

## 3.3. Perception of the euro in non-eurozone countries

### 3.3.1. Situation in 2012: minority support in most countries

**Outside the euro zone, a majority of respondents also expressed support for the single currency in Romania and Hungary in autumn 2012. A relative majority was also observed in Bulgaria.**

In contract, countries in which **fewer than half** of respondents were **on board** include:

- Older Member States which have chosen not to adopt the euro: 8 out of 10 respondents in the UK and around 7 out of 10 respondents in Denmark and Sweden;
- New Member States, to varying degrees: the lowest levels of support were expressed in Czech Republic, the highest in Lithuania, while intermediary levels were observed in Poland and Latvia.

### 3.3.2. 2007-2012 trends: a general downturn

**In 2012, support for the single currency has steeply declined over the five year period between 2007 to 2012 in countries where it once represented a majority:** Czech Republic (-38 points, primarily before 2011), Denmark (-24 points, a gradual decline to late 2011), Poland (-18 points, primarily before 2011), Lithuania, to a lesser degree (-11 points, a gradual decline).

Also on this list is Latvia, where a relative pro-euro majority existed in 2007, became an absolute majority in 2011 (a short time after the EU and IMF granted a loan allowing the state to meet its deadlines) but support has plummeted 18 points since then.

Results show that public opinion in Romania, Hungary and Bulgaria remains primarily favourable (among a relative majority of citizens, at least) although support has also gradually waned since spring 2007 (-17, -17 and -18 points, respectively).

Lastly, citizens in **Sweden** (where only a relatively small majority were hostile towards the euro five years ago) and **the United Kingdom** (already - and by far - the least supportive country) **have also become considerably less enthusiastic about the single currency** (support fell rather gradually by 22 points and 15 points, respectively).

## CONCLUSION

**After an initial decline at the start of the crisis in 2007, general perceptions of the EU deteriorated again in 2011 and have remained at historically low levels since.**

**Negative trends have also affected expectations about the economic prospects of the EU (one-year outlook) – fears now largely outweigh hopes for improvement.**

**Despite this gloom, Europeans appear to have not (yet?) lost hope in the EU's abilities to help solve the crisis.**

Similarly, while far fewer respondents say they are optimistic about the future of the EU compared with the large positive scores recorded in the past, optimists still slightly outnumber pessimists.

**Support for the euro, which waned less than previous indicators did, is still expressed by a majority of citizens across the EU (53% versus 40%) and even more (66%) in the euro zone, where nearly everywhere a clear and often sizeable majority of those polled are pro-euro in countries using the currency.**

**Support reaches levels comparable with the zone average in northern countries labelled as 'potential creditors':** Netherlands, Germany and Finland in particular. Citizens in these countries, sometimes described as being inclined to reject the single currency (adopted with reluctance by some), are in fact attached to it, even if criticism abounds in these countries regarding the lax public management which brought on the current situation.

**In the euro zone, a smaller percentage of respondents in southern Member States affected by the crisis express an affinity for the euro.** Now euro pessimists, this sentiment no doubt reflects the anxiety and bitterness felt for the crisis-driven 'cure' administered in these countries more than anything else.

Curiously, in fact, a relative (and sometimes greater) majority of citizens from these Member States (Greece, Cyprus, Italy, Portugal and Spain), when answering a question asked in the most recent wave of the Eurobarometer survey, are among the only ones to say that "since the crisis, they feel closer to citizens of other EU countries" – as if calling upon a sense of European solidarity they probably feared might weaken. A majority of Belgians expressed the same opinion, and relative majorities of respondents in Ireland, Malta and Poland did likewise.

Elsewhere the statement is shunned as an option.

This is another sign that a **new rift has appeared within the EU**, along with the **risk**, discussed a few months ago in the study "Do the Europeans still believe in the EU?" that this rift will **deepen a divide between the north and south of the continent.**

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