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Directorate-General for Communication Directorate for Relations with the Citizens Public Opinion Monitoring Unit

Brussels, 19 April 2011.

Special EB 75.1 European Parliament Eurobarometer

Europeans and Energy (Part II)

ANALYTICAL SYNTHESIS

Coverage: EU 27 (26 574 European citizens) **Population:** Europeans aged of 15+

Methodology: Face-to-face (CAPI)

Fieldwork: 9 February to 6 March 2011, conducted by TNS

Opinion

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INTRODUCTION

This Eurobarometer of the European Parliament dedicated to energy follows a previous survey* published in January 2011 in view of the European Council of 4 February (EB Standard 74.3). This survey dealt with energy supply, cooperation and solidarity.

Considering the new positions adopted by the European Parliament, **this new survey focuses on more specific themes**, but also extremely important for the development of an energy policy of the Union: **energy savings**, **energy supply difficulties**, **integration of networks and the European Community for energy**. The fieldwork was conducted by TNS Opinion between 9 February and 6 March 2011.

In each survey, it's always highly valuable to **take into account the context** in which the survey took place. For instance, in this survey the respondents were questioned in a period when all Europe was subject to **a hard winter**. Besides, high tensions were raising due to the **increase of** all raw materials **prices**.

Before developing each theme of this last study, it's important to note that both surveys share **a common point**: the results also highlight how the energy culture and the energy situation of each EU Member States influence the answers of the interviewed citizens.

Two socio-demographic aspects of this current survey have to be kept in mind: on the one hand, apart from a few exceptions, there are few differences between the answers of **men and women**; on the other hand, the results illustrate a real **generational gap** which is evident in both behaviour and perception of the energy problems.

⇒ On energy savings, European citizens prefer measures without a financial impact.

Europeans have been questioned on their energy savings during the year before the survey. Between 2006, date of the latest EB on the subject, and 2011, their behaviour sometimes changed in a contradictory way.

- On some aspects of this question, the citizens of the pre-2004 and post-2004/2007 Member States sometimes took completely different positions. The former cut more on heating consumption (+ 10 percentage points) than the latter. They also used their car less (+ 9 percentage points). On the other hand, the citizens of the post-2004/2007 States insulated their house the most during the past year (+ 7 percentage points).
- There is also a slight **men/women difference** (+/- 4 percentage points) on some of the proposed items. Women are more sensitive to measures connected to their home (which are free of charge), whereas men are more numerous in quoting the measures involving work (such as insulation) or a less frequent use of their car.

> Priority to domestic savings

Europeans modified their behaviour towards energy mostly in their family home. Actually, more than 24 percentage points separate these measures from all the others.

Thus Europeans decreased their **lighting** and the use of their **electric appliances** by 55% (48% in 2006), whilst reducing their **heating** or **air conditioning** by 43% (the same proportion as in 2006).

Accordingly, the table of results (p. 9) shows that citizens who have adapted their behaviour the most are from some of the Southern and Northern countries. Does this

mean that the Southern countries are more likely to catch up with their energy savings whilst those of the Northern countries would want to continue with their previous efforts?

> Unfavourable context to expensive measures

One could think that the various tax incentive measures taken by many Member States would have deeply influenced Europeans' behaviour towards energy. On the contrary; the results indicate that the financial, economic, social and monetary crisis have deeply reduced the effects of those incentives.

Actually, **home insulation** only makes up 19% of the answers (20% in 2006) and the purchase of a **more ecological car** is only 6% (8% in 2006).

Once again, great differences are noted between Member States.

- The citizens of the Baltic States are listed among those who have the most insulated houses along with the citizens from Slovenia and Slovakia, compared to the citizens of some Southern countries who have only slightly modified their behaviour in this area. This geographical gap raises the question whether or not the climate plays a role in the decision to better insulate our home.
- Concerning the change of car, it is now the citizens of the continental States who are clearly above the EU average.

> Significant number of Europeans changed "nothing" in their behaviour towards energy savings.

Last year, 17% of respondents declared they had done "nothing" to save energy. When asked the same question in 2006, they were higher in number (22%).

As we noted for domestic savings, the analysis of the table of results (p. 9) shows that, in comparison with the last survey, the countries that made the most efforts are some of the Southern countries. However, those countries are still above the EU average in taking no action to save energy.

⇒ Priority to "smart" energy meters¹ to reduce the energy bill

Europeans were questioned on different measures (two possible answers) proposed by the European Parliament aiming at reducing their energy bill.

> Daily measurement of energy consumption

In July 2009, the European Parliament voted in favour of the **widespread of "smart meters"**. The European Union set an objective to the Member States to spread the smart meters to 80% of the European family homes by 2020 and 100% by 2022. This European directive² should be transposed in the national law of each Member State before March 2011.

¹ The widespread usage of "smart" energy meters in every house, which are meters that allow a more effective usage of energy by selecting the cheapest one, and moreover by adjusting their energy consumption (electromagnetic devices, remote heating controls, etc.).

² This European directive is part of the objectives of the so-called "3x20", which was proposed by the European Commission to fight against the climate change and which included: a rise of the renewable sources by 20%; a reduction of the greenhouse effect by 20% (GES); and a rise of the energy efficiency by 20% by 2020. The European Commission considers that a 10% reduction of the energy expenses can be reach thanks to these smart meters.

This widespread of "smart meters" is considered a priority by 47% of the respondents. Fourteen countries consider it as their first priority. In Italy and Sweden, where "smart meters" are already in use, are first on the list of countries, with 59% each.

> For tax incentive and conditions for energy providers to compete

- To reduce their energy bill, 40% of the Europeans estimate that **tax incentives** (tax reductions) will improve their home energy efficiency and energy savings. It is the top priority in seven countries.
- Still in view reducing their energy bill, 36% of Europeans are in favour of **competition among different energy suppliers** as well as the possibility for consumers to easily change operator. This measure is also the highest priority in seven other countries.

> For transparency of bills

Quite often, consumers and consumer associations report the non-transparency of the bills they receive. In order to move towards a greater transparency, 23% of respondents want a **simplification of the bills** to make them more comprehensible and less unclear. In this way, Europeans will be helped in their consuming behaviour.

⇒ Making the objective of reducing energy use by 20% compulsory

In 2007, the European Union established a triple goal by 2020: reducing greenhouse gases by 20%, rising the energy efficiency by 20% and an additional 20% on energy savings. These objectives are not binding but the Member States must strive to achieve them.

Referring to the question about the reduction of energy use by 20%, 80% of Europeans consider that this objective must be made compulsory. Among them, 33% answered "yes, certainly" and 48% "yes, probably".

⇒ Fighting against the energy precariousness

According to Eurostat, 116 million of European citizens were at a risk of poverty or social exclusion in 2008 (annex 1). Therefore, specific energy tariff measures could contribute to avoid these people falling into such condition.

68% of Europeans agreed with the introduction of these measures. In fact, 38% answered "yes, probably" and 24% "yes, certainly".

Only the citizens of four countries answered "no" to this question with more than 50%.

One can observe that **67% of the States outside the Eurozone appear to favour** these tariff measures, compared to **58% in the Eurozone**.

⇒ Assets of a European integrated energy network

Nowadays, the European Union is composed of 27 national networks. What advantages will European citizens have in a European integrated energy network establishment? They have expressed a first and a second preference.

According to their answers, the European citizens consider that a **European integrated** energy network would lead to:

➤ A decrease in energy cost (59% of respondents).

If this measure is seen by Europeans in 21 Members States as the first advantage of a European network, 41 percentage points still divides the two countries that see the most and least advantages. Three Southern countries are among the highest percentage levels, whilst three Northern countries are among the lowest percentages.

➤ Better use of various types of energy (in particular renewable) is an asset for roughly one out of two Europeans (47%). Six countries consider this issue as their top priority.

Once again, the differences between Member States are quite high with a reach of 30% percentage points. This time, two Northern countries consider this as the most important benefit, whereas two Baltic States consider this as the least important one.

- > 35% of respondents cited a **safer delivery of energy** (a difference of 36 points).
- ➤ 28% cited a greater capacity for the EU to negotiate major contracts with countries outside its borders (a difference of 25 points).
- > 25% cited an **increased solidarity** among the EU Member States (a difference of 29 points)

⇒ Massive support to the establishment of a European Energy Community

What do Europeans think about the will expressed by the European Parliament on 25th November 2010 concerning the set up of a European Energy Community?³

This should allow the EU to speak with one stronger voice on the international scene, to reinforce the cooperation regarding energy networks and to favour a European financing of energy technologies.

Three quarters of the European respondents are definitely in favour of the creation of such a European Energy Community: 78% "agree" with this proposal. Amongst them, 51% "tend to agree" and 27% "totally agree".

* * *

³ The President of the European Parliament, Mr Jerzy Buzek, and the former President of the European Commission, Jacques Delors, declared to be in favour of the creation of the European Energy Community, a new EEC, on 5 May 2010.

- * Please refer to the EB 74.3 of the European Parliament, published on 31 January 2011 on energy supply in the European Union. The main themes were:
 - Europeans rate the coordination of energy policies above national measures
 - Europeans are in favour of solidarity between Member States in the event of supply difficulties
 - On energy cooperation, the priorities of Europeans are strongly influenced by the national energy situation
 - > Stability of energy prices, first priority of the respondents (29%)
 - Renewable energies, second priority of the respondents (27%)
 - ➤ Guarantee of energy supply, third priority of the respondents (20%)
 - ➤ Energy efficiency, fourth priority of the respondents (16%)

NB:

Readers are reminded that survey results are estimates, the accuracy of which, everything being equal, rests upon the sample size and upon the observed percentage. With samples of about 1,000 interviews (sample size usually used on a Member State scale), the real percentage, that is to say if the whole population had been interviewed, varies within the following confidence limits:

Percentages observed	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
Margin of error	+/-1.9 points	+/- 2.5 points	+/- 2.7 points	+/- 3.0 points	+/- 3.1 points

1. ENERGY SAVINGS

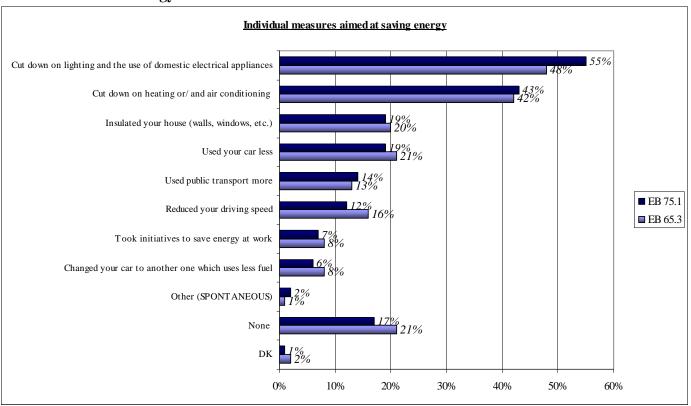
A. How do Europeans save energy?

Q16. During the past year, have you done any of the following to save energy? (Multiple answers possible)

Trend: Question asked in April-May 2006.

1. European average:

> A growing number of European citizens are taking measures to save energy.



- "Cut down on lighting" holds the top place and improves by 7 points (from 48% to 55%).
- "Cut down on heating" remains the second item cited and improves by 1 point (from 42% to 43%).
- The other measures proposed remain under 20% and are all decreasing in comparison with 2006, except for public transport which has risen from 13% to 14%.
- The answer "**none**", meaning none of the measures proposed to save energy has slightly evolved (from 21% to 17%, which is -4 points of percentage in 5 years).

Individual measures to			lighting and the use of domestic electrical Cut down on heating or/ and air conditioning		your car less	insulated your house (walls, windows, etc.)		None		Used public transport more		Reduced your driving speed		Took initiatives to save energy at work		Changed your car to another one which uses less fuel		
save energy	EB 75.1	Diff. EB 65.3 EB 75.1	EB 75.1	Diff. EB 65.3 EB 75.1	EB 75.1	Diff. EB 65.3 EB 75.1	EB 75.1	Diff. EB 65.3 EB 75.1	EB 75.1	Diff. EB 65.3 EB 75.1	EB 75.1	Diff. EB 65.3 EB 75.1	EB 75.1	Diff. EB 65.3 EB 75.1	EB 75.1	Diff. EB 65.3 EB 75.1	EB 75.1	Diff. EB 65.3 EB 75.1
EU27	55%	+7	43%	+1	19%	-2	19%	-1	17%	-4	14%	+1	12%	-4	7%	-1	6%	-2
BE	48%	+1	50%	-5	22%	-2	29%	+4	14%	+2	16%	-1	18%	-7	10%	+1	11%	+4
BG	53%	-	46%	-	10%	-	19%	-	19%	ı	11%	-	2%	-	5%	ı	2%	-
CZ	45%	+6	30%	+3	14%	-1	30%	-6	20%	-3	14%	0	5%	-3	5%	-1	5%	-4
DK	64%	+4	38%	+2	19%	+2	23%	-1	17%	-1	12%	-1	13%	-3	13%	+3	14%	+3
DE	64%	+9	59%	0	26%	-10	16%	-4	15%	+1	15%	-3	18%	-9	8%	-1	11%	-1
EE	55%	+10	18%	+5	17%	+3	40%	-7	12%	-3	17%	+2	5%	+1	10%	+2	6%	-8
ΙE	51%	+16	52%	+11	24%	+6	24%	+9	18%	-10	10%	0	13%	+1	9%	+1	7%	+2
EL	56%	+27	50%	+17	22%	+10	7%	-8	24%	-17	10%	-6	8%	+3	4%	+3	2%	0
ES	58%	+13	38%	+11	16%	+8	5%	0	21%	-16	15%	+6	11%	+6	6%	+2	2%	0
FR	46%	-3	46%	-10	25%	-4	21%	-5	16%	+6	13%	0	23%	-13	7%	-2	6%	-4
IT	49%	+13	33%	-3	14%	-2	16%	+5	20%	-2	10%	+1	5%	-4	6%	-2	5%	+1
CY	67%	+12	55%	+2	20%	-1	13%	+5	19%	-3	3%	-1	8%	-12	6%	-2	6%	0
LV	61%	+13	8%	+1	11%	+3	23%	-5	22%	-3	12%	0	4%	0	6%	+1	4%	-2
LT	62%	+26	10%	+2	12%	+5	30%	+2	18%	-15	14%	+3	4%	+2	8%	+4	6%	-1
LU	62%	+13	57%	-3	30%	+5	26%	-4	8%	-6	30%	+6	25%	+1	13%	+4	13%	-2
HU	65%	+17	42%	+14	13%	+4	25%	+4	11%	-15	12%	+1	5%	+1	4%	+1	1%	-5
MT	87%	+16	68%	+21	15%	+2	6%	+1	3%	-12	15%	+6	11%	0	19%	+9	7%	0
NL	46%	-6	46%	-7	20%	-3	18%	-10	16%	0	16%	+4	13%	-7	9%	0	7%	-1
AT	50%	+12	40%	+16	25%	-1	18%	-6	18%	-7	18%	-2	13%	+2	10%	+1	6%	-6
RO	54%	-	33%	-	9%	-	28%	-	23%	-	10%	-	3%	-	6%	-	2%	-
PL	65%	+12	30%	+7	9%	0	20%	-2	15%	-8	9%	+3	5%	-1	6%	+2	5%	-1
PT	76%	+30	33%	+8	11%	+2	16%	+8	12%	-24	4%	-2	4%	-2	5%	+1	2%	0
SI	70%	+37	53%	+26	22%	+8	35%	+17	10%	-26	15%	+7	17%	+7	10%	+6	10%	+2
SK	45%	-7	42%	-8	11%	-4	37%	0	18%	+3	7%	-2	4%	-1	8%	-1	6%	-1
FI	53%	+8	31%	-5	24%	-4	16%	0	19%	-1	16%	+1	10%	0	4%	-2	7%	-2
SE	63%	+19	32%	-5	26%	+4	15%	-1	10%	-12	29%	+11	16%	+4	13%	+6	14%	-1
UK	50%	-3	50%	+1	24%	-2	25%	-1	16%	-1	21%	+2	14%	-2	10%	-2	9%	-1
Légend	T	he highest	nercenta	Ισρ	1	The lowest	nercen	tage	I									

Légend The highest percentage
EB 65.3 April - May 2006 / EB 75.1 Feb. - March 2011

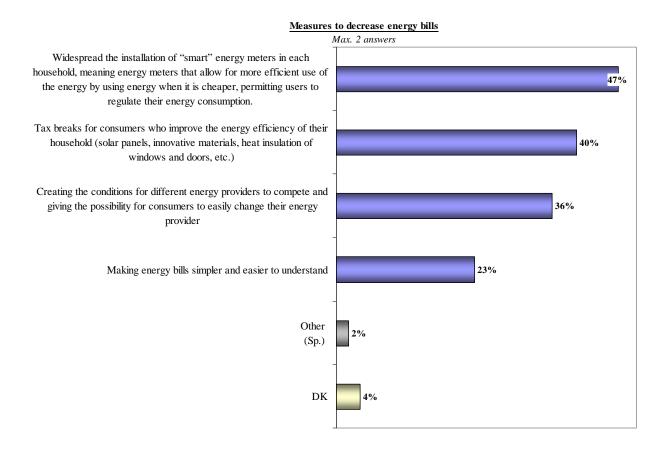
3. Sociodemographic variations:

• The proposed items are mostly cited by the respondents who are 25 years old and more, and even more by those who are 40 years old and more. On the contrary, the item "none" is the most cited by those who are 15-24 years old. This can be explained by the fact that generally teenagers do not have their own accommodation or a car, so their impact is weaker on these energy saving measures (and also on the related bill).

B. How to decrease energy bills?

Q18. According to you as an energy consumer, which two of the following measures would allow you to decrease your energy bills?

1. European average:



Measures allowing the decrease of the energy bill	Widespread the installation of "smart" energy meters in each household, meaning energy meters that allow for more efficient use of the energy by using energy when it is cheaper, permitting users to regulate their energy consumption (household devices, heating from a distance, etc.)	Tax breaks for consumers who improve the energy efficiency of their household (solar panels, innovative materials, heat insulation of windows and doors, etc.)	Creating the conditions for different energy providers to compete and giving the possibility for consumers to easily change their energy provider	Making energy bills simpler and easier to understand	NSP	Other (Sp.)
EU27	47%	40%	36%	23%	4%	2%
IT	59%	34%	29%	17%	2%	2%
SE	59%	51%	37%	20%	2%	2%
DK	58%	55%	29%	27%	3%	1%
CY	57%	64%	37%	19%	2%	0%
AT	54%	46%	29%	33%	1%	3%
SI	54%	57%	35%	20%	1%	2%
NL	52%	59%	20%	18%	3%	4%
PT	52%	22%	42%	15%	5%	2%
CZ	51%	36%	41%	21%	2%	1%
IE	49%	42%	36%	21%	9%	1%
FR	49%	53%	33%	14%	5%	1%
EL	48%	41%	46%	27%	2%	2%
HU	48%	43%	33%	23%	2%	2%
DE	47%	39%	49%	28%	2%	1%
LU	47%	54%	32%	11%	1%	2%
BE	46%	40%	42%	32%	1%	2%
SK	46%	30%	55%	19%	2%	2%
FI	45%	56%	39%	19%	1%	3%
UK	44%	39%	20%	27%	8%	2%
EE	42%	27%	42%	21%	9%	2%
BG	41%	29%	42%	45%	6%	1%
PL	41%	34%	36%	22%	7%	0%
ES	40%	36%	36%	26%	5%	2%
MT	37%	59%	36%	23%	4%	1%
RO	37%	32%	44%	24%	8%	1%
LT	36%	37%	54%	16%	3%	3%
LV	33%	43%	52%	11%	5%	1%
Legend	The highest percentage	The lowest percentage				11

C. How to reach the objective of 20% of energy savings?

Q17. The EU and its Member States have set an objective to reduce energy use by 20% by 2020. To do so, do you think that this objective must be compulsory in all the EU Member States?

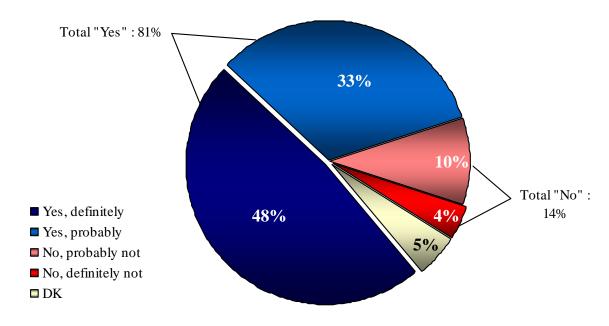
1. European average:

• More than 80% of Europeans consider that the objective of reduce of 20% of energy savings become compulsory in the Member States (48% "Yes, probably" and 33% "Yes, definitely").

OBJECTIVE OF REDUCING ENERGY USE OF 20% BY 2020

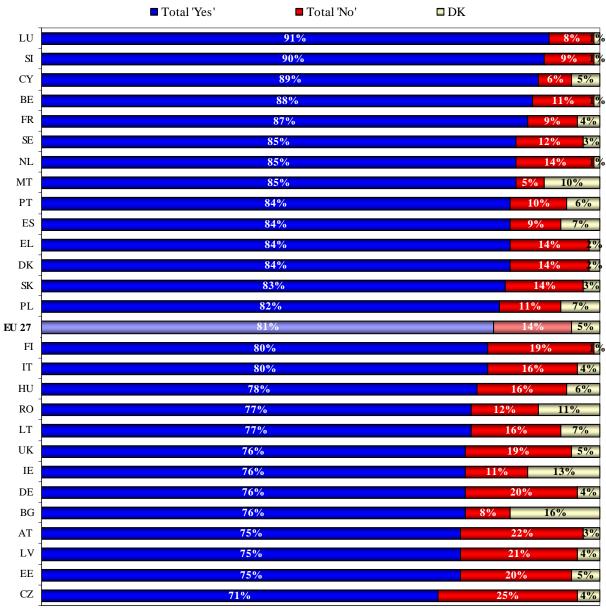
The EU and its Member States have set an objective to reduce energy use by 20% by 2020. To do so, do you think that this objective must be compulsory in all the EU Member States?

European weighted average



OBJECTIVE OF REDUCING ENERGY USE OF 20% BY 2020

Differences between Member States



3. Sociodemographic variations:

- **Respondents who have studied longer** seem to be more in favour of this assertion. Indeed, there is a maximum interval of 7 percentage points.
- Considering the socio-professional aspect, the **managers** (85%), the **unemployed** and the **students** (82% in total) appear the most favourable to set the objective of the 20% compulsory.

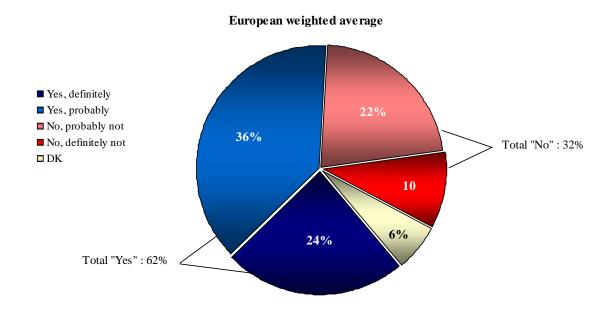
2. ENERGY PRECARIOUSNESS

A. Specific energy tariff measures aimed at citizens at a risk of poverty and exclusion?

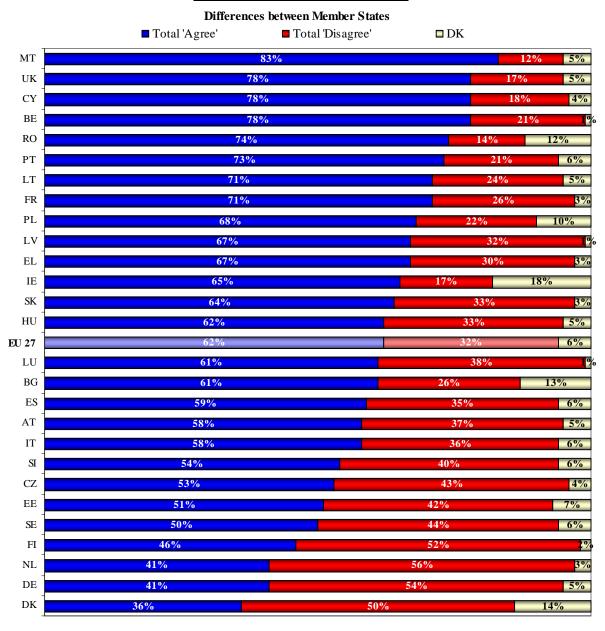
1. European average:

Q20. 116 million European citizens (i.e. almost a quarter of the whole European population) are at risk of falling into poverty and exclusion. Do you think that specific energy tariff measures could contribute to avoid these people falling into poverty and exclusion?

SPECIFIC ENERGY TARIFF MEASURES



SPECIFIC ENERGY TARIFF MEASURES



See annexe 1: Eurostat 190/2010 "In the EU27, 116 million people were at risk of poverty or social exclusion in 2008"

3. Sociodemographic variations:

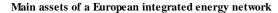
• 67% of the respondents who have experienced these financial difficulties (difficulties to pay bills) are in favour of these tariff measures.

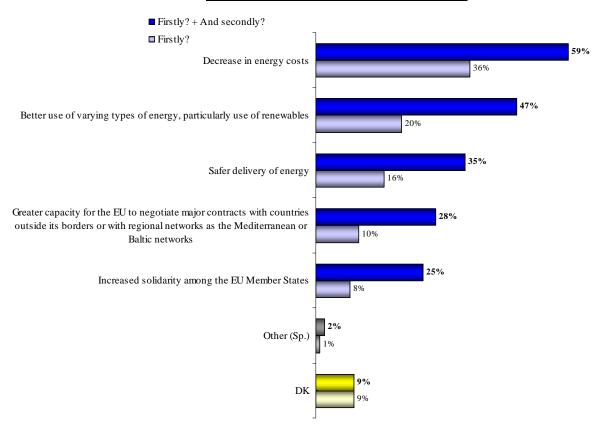
3. <u>AN INTEGRATED ENERGY NETWORK AND EUROPEAN ENERGY COMMUNITY</u>

A. What would be the advantages of a future European integrated energy network?

Q19. Because of the existence of 27 national networks, the EU does not have an integrated energy network According to you, which would be the main advantages of putting in place such a network? Firstly? And secondly?

1. European average:





2. <u>Sociodemographic trends:</u>

- The respondents who studied less are the most numerous to quote the decrease in the energy costs and a better use of renewable energies.
- The respondents who declare having difficulties to pay their bills (sometimes
 or most of the time) are the most numerous to quote the decrease in the
 energy costs.

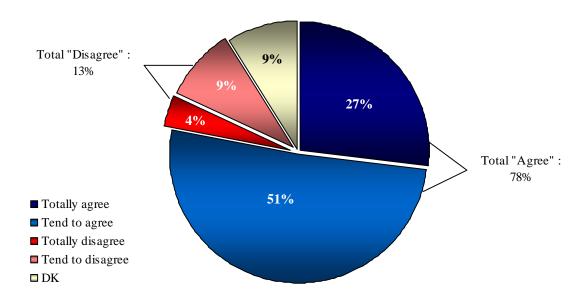
B. A European Energy Community?

Q21 The European Parliament would like to put in place a European Community for energy. In this case, please tell me to what extent you agree or disagree with the following statement: Establishing a European Community for energy would, among other things, allow the EU to have a stronger voice on the international scene concerning energy issues.

1. European average:

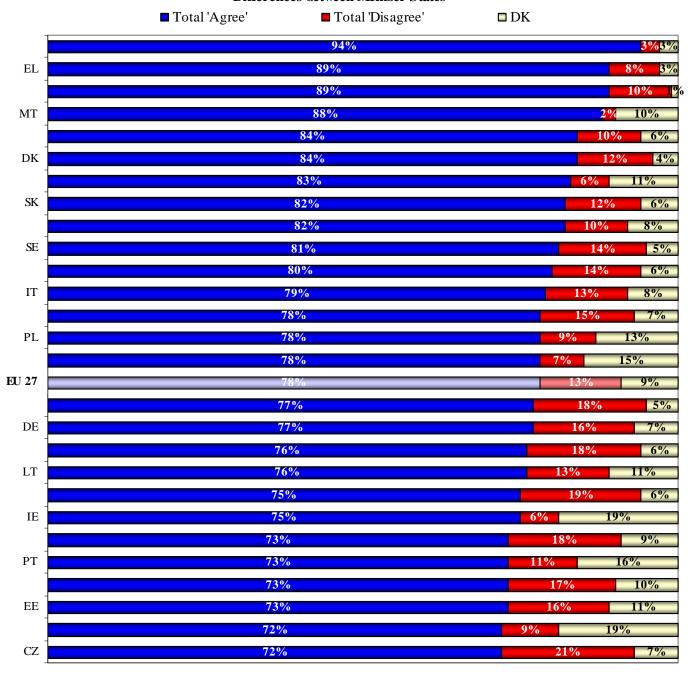
EUROPEAN ENERGY COMMUNITY

European weighted average



EUROPEAN ENERGY COMMUNITY

Differences between Member States



ANNEXE 1: Eurostat

In the EU27, 116 million people were at risk of poverty or social exclusion in **2008**

190/2010 - 13 December 2010

Poverty and social exclusion, 2008 thousand persons

	At-risk-of-poverty after social transfers ⁵	Severely materially deprived ⁵	Living in households with very low work intensity ⁵	Falling under at least one of the three criteria	Falling under all three criteria
EU27	81 036	41 506	34 191	115 843	6 918
Belgium	1 554	595	967	2 194	211
Bulgaria	1 632	3 151	470	3 420	343
Czech Republic	925	696	581	1 566	139
Denmark	643	107	347	887	19
Germany	12 389	4 442	7 044	16 345	1 408
Estonia	259	65	55	291	15
Ireland	686	243	509	1 050	69
Greece	2 187	1 213	611	3 046	124
Spain	8 862	1 150	2 187	10 340	194
France	7 924	3 253	4 074	11 301	829
Italy	11 149	4 494	4 344	15 099	752
Cyprus	127	64	27	174	7
Latvia	573	425	91	757	48
Lithuania	671	502	135	984	51
Luxembourg	62	3	18	72	1
Hungary	1 226	1 771	943	2 794	263
Malta	59	16	26	79	4
Netherlands	1 713	252	1 053	2 432	85
Austria	1 018	524	503	1 532	116
Poland	6 353	6 680	2 444	11 491	704
Portugal	1 967	1 029	517	2 757	122
Romania	4 988	7 023	1 413	9 418	521
Slovenia	241	130	105	361	21
Slovakia	588	636	225	1 111	72
Finland	710	181	296	910	39
Sweden	1 121	132	381	1 367	31
United Kingdom	11 410	2 727	4 824	14 063	730
	+				

Poverty and social exclusion, 2008 % total population

	At-risk-of-poverty after social transfers ⁵	Severely materially deprived ⁵	Living in households with very low work intensity ⁵	Falling under at least one of the three criteria	Falling under all three criteria
EU27	16.5	8.5	9.0	23.6	1.4
Belgium	14.7	5.6	11.7	20.8	2.0
Bulgaria	21.4	41.2	8.1	44.8	4.5
Czech Republic	9.0	6.8	7.2	15.3	1.4
Denmark	11.8	2.0	8.3	16.4	0.4
Germany	15.2	5.5	11.6	20.1	1.7
Estonia	19.5	4.9	5.3	21.9	1.2
Ireland	15.5	5.5	13.6	23.7	1.6
Greece	20.1	11.2	7.4	28.1	1.1
Spain	19.6	2.5	6.2	22.9	0.4
France	13.1	5.4	8.8	18.8	1.4
Italy	18.7	7.5	9.8	25.3	1.3
Cyprus	16.2	8.2	4.1	22.2	0.9
Latvia	25.6	19.0	5.1	33.8	2.2
Lithuania	20.0	15.0	5.1	29.3	1.5
Luxembourg	13.4	0.7	4.7	15.5	0.2
Hungary	12.4	17.9	12.0	28.2	2.7
Malta	14.6	4.0	8.2	19.5	1.1
Netherlands	10.5	1.5	8.1	14.9	0.5
Austria	12.4	6.4	7.8	18.6	1.4
Poland	16.9	17.7	7.9	30.5	1.9
Portugal	18.5	9.7	6.3	26.0	1.2
Romania	23.4	32.9	8.2	44.2	2.4
Slovenia	12.3	6.7	6.7	18.5	1.1
Slovakia	10.9	11.8	5.2	20.6	1.3
Finland	13.6	3.5	7.3	17.4	0.8
Sweden	12.2	1.4	5.4	14.9	0.3
United Kingdom	18.8	4.5	10.2	23.2	1.2

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