

Pan-European survey on EU enlargement and deepening

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Credits

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Wilfried Martens Centre for European Studies

Rue du Commerce 20 Brussels, BE 1000

For more information, please visit www.martenscentre.eu.

Authors and Editors: Sara Davidson and Maria Chiara Vinciguerra, Ipsos European Public Affairs.

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1 EXECUTIVE SUMMARY

This report presents the findings of an EU-27-wide general population survey, conducted by Ipsos on behalf of the Wilfried Martens Centre for European Studies (WMCES). The survey aimed to build a better understanding of EU citizens' attitudes and views towards the enlargement and deepening of the European Union.

The study was conducted between 4 and 21 June 2024. In each Member State, the achieved sample size was c1,000 – apart from in Luxembourg, Malta and Cyprus, where it was c500. In total, 25,844 interviews were completed across the Member States.

Perceptions of Europe and the EU

Just over three-quarters of respondents (76%) said they identified to a great extent or to some extent with Europe, compared with 85% who identified with the country in which they lived, and 81% who identified with their city, town or village.

The perceived most important issue dimension for the future of Europe was the continent's security and peace, mentioned by 53%. This was followed by the economy, jobs and tackling poverty (42%), climate change and the environment (38%), and migration and border control (37%).

Almost two-thirds of respondents (62%) said they understood a great deal or a fair amount about the European Union. Asked what specific words or phrases they associated with the EU, they gave a diverse array of answers. **In relative terms, the most common associations were all positive and related to freedom of movement (35%), the euro/single currency (33%) and peace and stability/security (30%)**.

Nearly two-thirds of respondents (63%) believed their country had benefitted from EU membership, including 20% who felt it had benefitted *a great deal*. Meanwhile around a third (32%) felt their country had not benefitted much or at all from membership.

Seven in ten (69%) were generally in favour of the EU – though this included 41% who were unhappy with the way the EU was working at present, and a somewhat lower proportion (29%) who were happy. A further 21% of respondents were rather sceptical of the EU but said they could change their opinion if the way it worked really changed. Six percent were opposed to the general idea of the EU.

Approaching half (46%) of respondents said their image of the EU has remained stable over the last five years, while 38% said it has got worse and 13% said it has improved. In total, half of all respondents said they were optimistic about the future of the EU, while 41% said they were pessimistic.

On the specific matter of the EU's future decision-making powers, there was a clear appetite for some form of change. Around a third (37%) of respondents in total favoured an enhancement of the EU's powers, including 10% who favoured a single European Government. Another third (35%) wanted to see fewer decisions taken at the EU level and more at the Member State level. This included 7% who wanted to see the EU abolished entirely. Fewer than a quarter (22%) of respondents wanted the EU to maintain about the same level of power as at present. The appetite for change was reflected in all Member States, with the proportion of respondents favouring a continuation of the status quo never reaching 40%.

Of those respondents who were in favour of the EU having more or about the same level of power as at present, almost four in five (79%) favoured a single-speed EU, in which all Member States increased their cooperation at the same pace. That said, roughly half of these respondents also felt that countries should be able to *opt out* of decisions with which they disagreed. A further 16% favoured a

more pluralistic approach to integration, with individual countries able to choose when to increase their cooperation based on their individual circumstances.

Views on the future balance of power between the EU and national-level governments in key policy domains varied but, overall, a majority of respondents saw at least some role for the EU in each area, albeit not necessarily a dominant role. At least seven in ten saw a role for the EU in the areas of environment and climate change (76%); foreign policy, security and defence (75%); the economy, trade and growth (71%); and migration and refugees (70%). A similar proportion saw a role for the EU in energy policy (69%) and consumer protection (67%). Somewhat fewer, though still a majority, saw a role for the EU in agriculture and fisheries (59%); employment and social security (55%); and healthcare (54%).

Attitudes towards EU enlargement

Views of past EU enlargement rounds (since 1995) were very mixed depending on the round. **A large majority of respondents (76%) felt the accession of Austria, Finland and Sweden had been a good thing. A somewhat lower proportion, though still a majority (53% and 52% respectively), were positive about the accession of Croatia and of the various countries that joined the EU in 2004. Opinion was more divided on the accession of Bulgaria and Romania:** Just over a third of respondents (38%) felt this has been good for the EU (compared with just over a quarter (28%) who felt it had been both good and bad, and a similar proportion (26%) who felt it had been bad).

The top reasons for viewing past enlargement rounds positively were that they had made it easier to move and travel to/from the new member countries; and had created business opportunities, economic growth, and modernisation in the new member countries and other EU countries. Reasons for viewing past rounds negatively varied a little more depending on the round. That said, **uncontrolled immigration and poor border control emerged among the top two responses for all rounds** – and was the top response for the Austria-Finland-Sweden round.

Opinion on the question of further EU enlargement was mixed: Whereas 38% felt the EU should be looking to add more member countries at present, 31% felt it should not and a further 20% were indifferent on the matter. This mixed picture was replicated in most Member States. That said, the proportion in favour of the EU adding more member countries reached a majority in Lithuania (57%), Romania (54%), Bulgaria and Poland (50% in both cases). In contrast, approaching half of respondents in three West European countries – Luxembourg (48%), France (47%), and Austria (46%) – felt the EU should *not* be looking to add more member countries at this moment.

For the most part, opinion on the accession of current EU candidate countries was equally mixed. In the case of the Western Balkan countries, Moldova and Georgia, for example, approximately one third of respondents were in favour of accession, while another third were against, and around 20% were indifferent. Similarly, for Ukraine, 41% were in favour of accession while 34% were against and 14% were indifferent. Views were somewhat less divided in the case of Turkey, with just over half of respondents (51%) feeling this country should *not* be allowed to join the EU, compared to 23% who believed it should and 15% who were indifferent.

As regards the potential future accession of Armenia and Belarus, more respondents opposed than supported this too. In the case of Belarus opposition rose to 55% (compared to 36% for Armenia).

Respondents were asked about specific potential impacts of different candidate countries joining the EU. Views were once again quite mixed but, generally, **the proportion of respondents anticipating negative impacts exceeded the proportion anticipating positive ones**. This was especially the case in relation to Ukraine and, to a lesser extent, Turkey. Indeed, almost half of respondents anticipated that these countries joining the EU could undermine the bloc's security (49% and 44% respectively) – and also their own country's security in the case of Ukraine (at 42%). Security impacts were among

respondents' top-ranking concerns for *all* of the other candidate countries too (albeit to varying levels), along with potential impacts on the EU's economy and on the general functioning of the bloc.

Views on criteria and considerations for EU membership

Asked what they considered to be the most important criteria for EU membership, **respondents placed the greatest emphasis on potential member countries having stable political institutions that support democracy, justice, and the rule of law** (91% considered this essential or very/fairly important), **and on those countries being able to follow EU rules, standards, and laws** (91%). Having a strong, resilient economy was considered similarly important (85%).

Almost seven in ten respondents (66%) said they would be more likely to support accession if it led to greater peace, security, and political stability in the candidate countries. Around six in ten said they would be more supportive if it meant stronger EU defence (61%), more business opportunities in their own countries (60%), or higher social, environmental, and consumer standards in the candidate countries (57%).

Views varied on specific benefits of EU memberships that candidate countries should be able to enjoy during accession. Around three in five respondents agreed that candidate countries should have access to policy advice and expertise (61%) and be able to trade freely with the EU (56%). However, opinion was more divided regarding access to work or visitor permits, EU funds and military support.

On the question of new member countries being granted veto power across various policy areas, respondents tended to lean more towards opposing than supporting this. For example, just over two in five opposed the veto power in relation to foreign policy, changes to EU laws and EU taxation matters, while just over one in five supported it.

Preferences for future EU enlargement decision-making

Just over half of respondents (51%) expressed support for a large (or qualified) majority approach to voting on enlargement decisions, while 23% opposed this, and 20% were neutral. The idea of a smaller majority (i.e. 51%) voting approach met with less enthusiasm: only 23% supported this, while nearly half (47%) opposed it and another 23% were neutral. Support for the *large majority voting approach* held at a majority level in more than half of Member States, peaking at 62% in Lithuania. It fell to 45% or lower in Czechia (38%), Greece (45%) and Slovakia (45%). Support for the minority voting approach consistently remained at minority level in all Member States, ranging from just 15% in Luxembourg to 42% in Romania.

A large majority (78%) of respondents expressed interest in receiving more information from the EU about the benefits and risks of new countries joining the bloc. Further, **almost two-thirds (64%) felt that EU citizens should have a more direct say on which countries should be allowed to join.** The most popular mechanism for achieving this was through a public vote or referendum (favoured by 57%).

Segmentation analysis

A segmentation analysis was conducted to synthesise findings presented and to provide a more concise, action-oriented assessment of how Europeans group (or 'segment') when it comes to attitudes towards EU enlargement, deepening and associated themes. Five distinct groups or segments of citizens emerged from the analysis:

- **Group 1: 'Enlargement enthusiasts'** (25% of the sample) – This group is highly enthusiastic about the European Union and its future trajectory. It strongly supports a growth in the bloc's decision-making powers and its membership, including the integration of almost all current

candidate countries. It also agrees with those countries being able to enjoy benefits of EU membership during accession.

- **Group 2: ‘Enlargement conditionalists’ (24%)** – This group too holds generally positive views of the EU and its future, but is more divided than group 1 on the question of enlargement and deepening. It also displays more mixed views on candidate countries being able to enjoy benefits of EU membership during accession.
- **Group 3: ‘Ambivalent critics’ (23%)** – This group tends towards dissatisfaction with the EU and the way it is working, and almost half of it wishes to see fewer decisions being taken at the EU level. Like group 2 though, its views on enlargement are mixed and, indeed, it is generally in favour of candidate countries being able to enjoy benefits of membership during accession.
- **Group 4: ‘The disillusioned sceptics’ (22%)** – This group is quite critical of the EU and has become more so over recent years. It is also pessimistic about the EU’s future and would like to see fewer decisions taken at the EU level. Reflecting this, the group is negative about enlargement and mainly disagrees with candidate countries being able to access benefits of EU membership during accession. On the other hand, most of the group *does* see a role for the EU in certain policy areas, including foreign policy, migration, the environment, energy, consumer protection, and the economy.
- **Group 5: ‘The hardline sceptics’ (7%)** – This group is strongly opposed to the EU, with the majority favouring abolition. By extension, it is also strongly against further EU deepening or enlargement, or candidate countries being able to access benefits of membership during accession.

2 INTRODUCTION

2.1 Background and objectives

The Wilfried Martens Centre for European Studies (WMCES) is the official think tank of the European People's Party (EPP), the largest party in the European Parliament since 1999 and in the European Council since 2022. The mission of the Martens Centre is to offer decision makers and opinion leaders in the European policy-making ecosystem assistance in formulating new and effective policy options.

In 2024, the think tank commissioned Ipsos European Public Affairs to run a general population survey across the EU-27, as a first step towards building a better understanding of EU citizens' attitudes and views towards the enlargement and deepening of the European Union.

The key objectives of the survey were to understand:

- conceptions of "Europe" across different socio-demographic groups and countries;
- attitudes towards the EU enlargement and deepening process, particularly in relation to accession negotiations with Ukraine, the Republic of Moldova and the Balkan countries;
- attitudes of different socio-political groups towards various models of differentiated integration in the EU;
- perceptions of how the roles of the European institutions should be reformed in relation to the EU enlargement and deepening process.

2.2 Methodology

The survey was conducted between 4 and 21 June 2024 in all EU-27 Member States.

In each country, the target population was adults aged 18 and over, and the target sample size was 1,000 – apart from in Luxembourg, Malta and Cyprus, where the target sample size was 500. In total, 25,844 interviews were completed across the Member States. The achieved sample size (unweighted) per country is shown in Table 2.1.

Table 2.1: Target and achieved sample size per country

Country	Target	Sample size	Country	Target	Sample size
Belgium	1,000	1,000	Lithuania	1,000	1,015
Bulgaria	1,000	1,009	Luxembourg	500	500
Czechia	1,000	1,016	Hungary	1,000	1,006
Denmark	1,000	1,001	Malta	500	506
Germany	1,000	1,011	Netherlands	1,000	1,029
Estonia	1,000	1,014	Austria	1,000	1,015
Ireland	1,000	1,017	Poland	1,000	1,020
Greece	1,000	1,003	Portugal	1,000	1,017
Spain	1,000	1,032	Romania	1,000	1,012
France	1,000	1,014	Slovenia	1,000	1,000

Country	Target	Sample size	Country	Target	Sample size
Croatia	1,000	1,014	Slovakia	1,000	1,006
Italy	1,000	1,044	Finland	1,000	1,030
Cyprus	500	507	Sweden	1,000	1,002
Latvia	1,000	1,004	TOTAL	25,000	25,844

2.2.1 Survey mode and country coverage

The survey was conducted online via CAWI (Computer-Assisted-Web-Interviewing), with the sample drawn from Ipsos' proprietary non-probability/volunteer online Access Panels. Prospective respondents were sampled in line with the screening criteria mentioned in Section 2.2, with quotas applied to achieve, as far as possible, a representative sample. Quota sampling aims to represent the major characteristics of the population of interest by sampling a proportional amount of each. For this project, hard quotas were set in terms of gender, age and region (not interlocked) based on latest available population statistics. The profile of the emerging sample was also monitored for urbanity/rurality (i.e. soft quota).

Post-survey corrective weighting was applied to the data as follows: 1) "in country" or national weights were applied for each country surveyed, based upon gender, age group and geographic region; 2) cross-country weights were calculated to allow estimates to be obtained for the whole sample and for any combination of countries such that the weighted sample size for each country would be proportionate to the size of its eligible population.

2.3 Interpreting the data

Throughout this report, differences in the view of different subgroups of respondents are highlighted (for example, in terms of country, gender, urbanity, education, political values etc.). To facilitate the analysis by political values, a derived variable was created (based on Q36 of the survey¹), such that:

- the individual statements of Q36 were first recoded into a tripartite banding: scores 0-3 = right/centre-right; scores 4-6 = centre; scores 7-10 = centre-left/left (in the case of rows/statements 4 and 5, coding was done in the opposite way, as the statements had opposite valence, so therefore: scores 0-3 = centre-left/left; scores 4-6 = centre; scores 7-10 = right/centre-right);
- a count was then made of how many times across the six Q36 statements a respondent was positioned on the right/centre-right, centre and centre-left/left. On the basis of this count, respondents were then assigned to the categories right/centre-right, centre, and centre-left/left depending on which of the counts was the highest. For case where there was a tie in the count (e.g. 3 times assigned to the right/centre-right and 3 times assigned to left/centre-left), the label "No clear orientation" was applied instead.

It should be noted that survey results are subject to sampling tolerances, meaning that not all apparent differences between groups may be statistically significant. Only differences that are statistically significant (at the 5% level) – i.e. where we can be reasonably certain that they are unlikely to have occurred by chance – are highlighted in the text.

The percentages in this report are given without a decimal and due to rounding percentages may not add up to 100% exactly. The bars in charts take into account decimals, explaining small differences in the length of bars showing the same percentages. Where percentages do not sum to 100%, this may

¹ A copy of the survey questionnaire is provided in Annex 1.

be due to computer rounding or multiple answers. An asterisk (*) denotes any value less than half one per cent but more than zero, while a dash (-) denotes zero. Aggregate percentages (e.g. "strongly agree/tend to agree") are calculated for all 5-point, 6-point and 10-point scales.

In this report, tabulated country-level results are presented using a colour spectrum, where dark blue signifies the highest ranked/scoring, and light blue signifies the lowest ranked/scoring, among all countries.

In the report, countries are at times referred to by their official abbreviation. The abbreviations used are shown in Table 2.2 below.

Table 2.2: Country abbreviations

BE		Belgium	LT		Lithuania
BG		Bulgaria	LU		Luxembourg
CZ		Czechia	HU		Hungary
DK		Denmark	MT		Malta
DE		Germany	NL		Netherlands
EE		Estonia	AT		Austria
IE		Ireland	PL		Poland
EL		Greece	PT		Portugal
ES		Spain	RO		Romania
FR		France	SI		Slovenia
HR		Croatia	SK		Slovakia
IT		Italy	FI		Finland
CY		Cyprus	SE		Sweden
LV		Latvia			

Throughout the report, there are also references to regional differences in the results. For this purpose, the following categorisation of regions of Europe has been adopted:

- Northern Europe: Denmark, Estonia, Finland, Ireland, Latvia, Lithuania and Sweden;
- Eastern Europe: Bulgaria, Czechia, Hungary, Poland, Romania and Slovakia;
- Southern Europe: Cyprus, Greece, Italy, Croatia, Malta, Portugal, Slovenia and Spain;
- Western Europe: Austria, Belgium, Germany, France, Luxembourg and the Netherlands.

2.4 Structure of the report

The report is structured as follows:

Chapter 3 provides an overview of respondents' general feelings about Europe and the European Union.

Chapter 4 details respondents' views on past EU enlargement rounds, their general openness to further enlargement in the future, their level of support for specific countries joining the EU, and their views on the likely impact of this.

Chapter 5 examines respondents' views on criteria for EU membership, and on candidate countries having access to EU membership benefits during accession. It also considers wider factors influencing views on accession, including the granting of veto power to new member countries.

Chapter 6 details respondents' views on different approaches to voting on enlargement, their appetite for more information on the risks and benefits of enlargement, and for citizens having a more direct say in the process.

Chapter 7 details the segmentation analysis undertaken on this research and Chapter 8 provides conclusions emerging from the study.

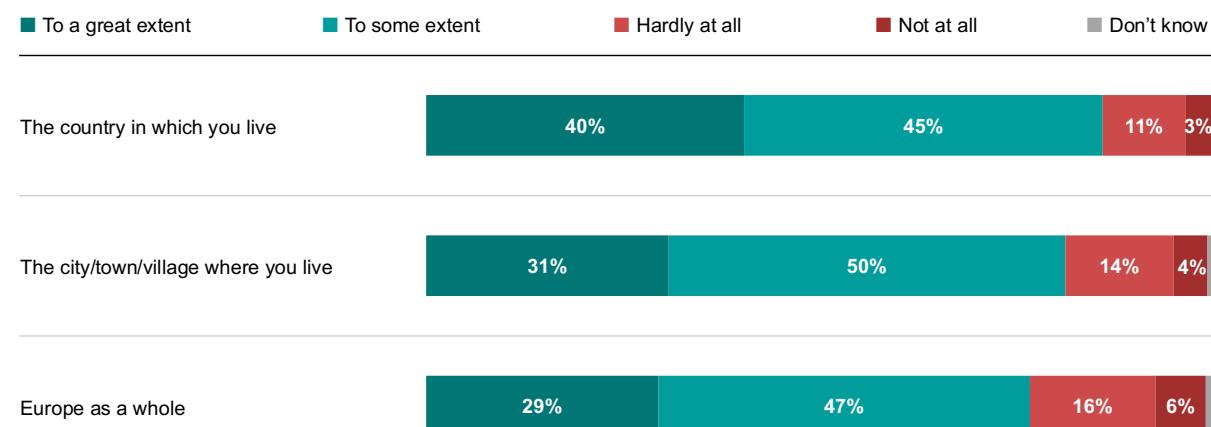
3 PERCEPTIONS OF EUROPE AND THE EU

This chapter sets the scene for views on the topics of European Union enlargement and deepening, by providing an overview of respondents' general feelings about Europe and the EU.

3.1 Identification with the local, national and EU levels

Approaching nine in ten respondents said they identified to a great extent or to some extent with the country in which they lived (85%), while around eight in ten identified with the city/town/village where they lived (81%) and with Europe as a whole (76%). Strong feelings of identification (i.e. identifying to a great extent) were similarly most pronounced with respect to the country level (40%), followed by the city/town/village level (31%), then the European level (29%) (Figure 3.1).

Figure 3.1: Identification with the local, country and European levels



Base: N=25844 (All respondents)

Question: People have different views about themselves and how they relate to the world. To what extent, if at all, do you identify with..?

Identification with the country level was higher than with either the city/town/village or the European level in most Member States (Table 3.1). Indeed, the proportion of respondents who identified to a great extent or to some extent with the country in which they lived held at more than 80% in all Member States, and rose to 90% or higher in ten of them – Romania (90%), Portugal (91%), Sweden (91%), Luxembourg (91%), Latvia (91%), Czechia (92%), Denmark (93%), Estonia (93%), Poland (93%) and Finland (95%).

Still, identification with the city/town/village was higher than with the country (or EU) level in three Member States, namely, Croatia (85%), Hungary (87%) and Slovakia (87%). It was also higher than average in Czechia (88%), Latvia (88%), Estonia (87%), Hungary (87%), Romania (87%), Slovakia (87%), Spain (87%), Bulgaria (86%), Portugal (86%), Croatia (85%) and Poland (85%).

Malta was the only country in which more respondents said they identified with Europe than with either of the two other levels (83%). Identification with Europe was also higher than average in Portugal (88%), Romania (88%), Poland (86%), Slovakia (86%), Estonia (85%), Finland (85%), Latvia (84%), Spain (84%), Hungary (83%), Malta (83%), Cyprus (82%), Denmark (82%), Lithuania (82%), Czechia (80%), Greece (80%) and Sweden (81%) and Croatia (79%).

Table 3.1: Proportion of respondents identifying with the local, country and European levels, “to a great extent” or “to some extent” (%)

	EU27	AT	BE	BG	HR	CY	CZ	DK	EE	FI	FR	DE	EL	HU	IE	IT	LV	LT	LU	MT	NL	PL	PT	RO	SK	SI	ES	SE
The city/town/village where you live	81	81	76	86	85	84	88	77	87	83	72	82	83	87	83	76	88	80	80	75	78	85	86	87	87	82	87	80
The country in which you live	85	89	82	87	84	88	92	93	93	95	82	85	85	81	89	77	91	88	91	82	88	93	91	90	86	84	88	90
Europe as a whole	76	72	69	78	79	82	80	82	85	85	65	75	80	83	77	69	84	82	78	83	70	86	88	88	86	73	84	81

Base: N=25844 (All respondents)

Question: People have different views about themselves and how they relate to the world. To what extent, if at all, do you identify with...?

At the socio-demographic level, identification with all three geographical levels increased with age. It was also consistently higher than average among respondents living in a large town or city than among those living in more rural areas (Table 3.2).

Alongside these differences, identification with the European level specifically was higher than average among the most educated respondents, those who found it easy to manage on their income and those with centre-left/left political values.

Table 3.2: Proportion of respondents identifying with the local, country and European levels, by age and urbanity/rurality

	City/town/village	Country	EU
% Who identified to a great extent/some extent			
Age			
18-24	74%	78%	75%
25-34	78%	82%	76%
35-44	80%	84%	76%
45-54	80%	85%	74%
55-64	82%	87%	76%
65+	85%	91%	78%
Urbanity/rurality			
Rural area/village	78%	83%	71%
Small or medium-sized town	79%	85%	75%
Large town or city	85%	87%	81%
Education			
Low	78%	81%	67%
Mid	81%	85%	74%
High	81%	87%	80%
Ease of managing financially			
Very/fairly difficult	79%	82%	71%
Very/fairly easy	83%	88%	81%
Political values			
Right/Centre-right	82%	86%	67%
Centre	80%	86%	76%
Centre-left/Left	80%	84%	81%
No clear orientation	82%	87%	75%

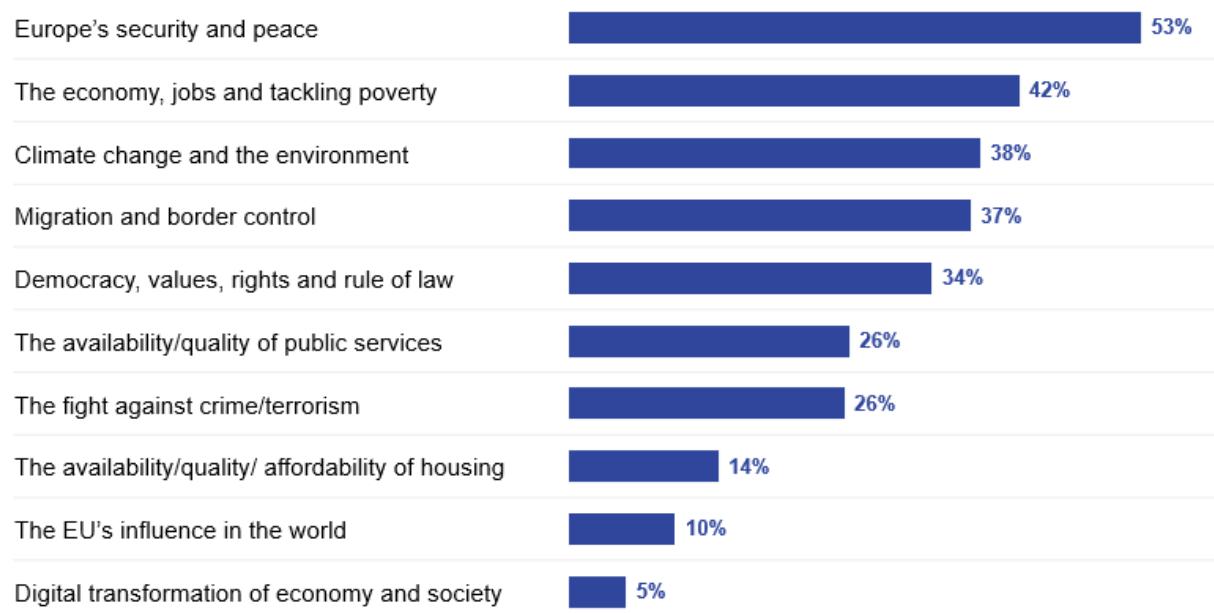
3.2 Most important issues for the future of Europe

Respondents were presented with a list of ten issue dimensions and asked which of these they thought were the most important for the future of Europe.

Across the EU, the most commonly selected issue dimension was Europe's security and peace, mentioned by 53% (Figure 3.2). This was followed by the economy, jobs and tackling poverty (42%), climate change and the environment (38%), migration and border control (37%) and democracy, values, rights and rule of law (34%). The next highest-ranking issue dimensions were the availability/quality of public services, and the fight against crime/terrorism, each of which was selected by about a quarter of respondents (26% in both cases).

The issue dimensions selected *least* often, meanwhile, were the availability/quality/affordability of housing (14%), the EU's influence in the world (10%), and the digital transformation of the economy and society (5%).

Figure 3.2: Most important issues for the future of Europe



Base: N=25844 (All respondents)

Question: Which of the following issues do you think are the most important for the future of Europe?

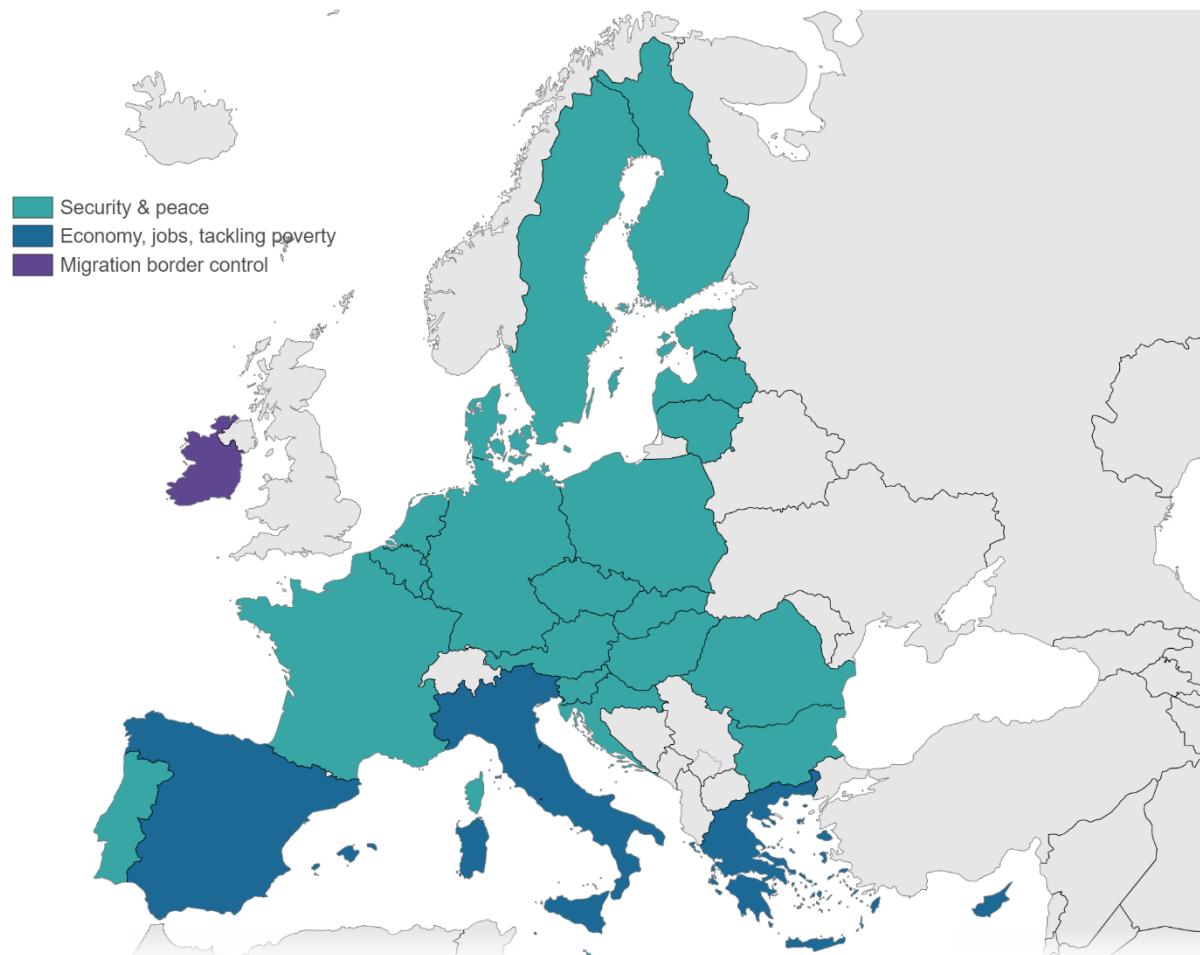
As illustrated by the map below, **Europe's security and peace held as the perceived most important issue dimension for the future of Europe in almost all Member States** (see Figure 3.3), with the exception of:

- several countries in the South of Europe – Greece (64%), Cyprus (63%), Spain (53%) and Italy (52%) – where the economy, jobs and tackling poverty emerged as the most important issue;
- Ireland – where migration and border control emerged as the most important issue (45%) (see Table 3.3).

Figure 3.3: Most important issues for the future of Europe, by country

Q2 Which of the following issues do you think are the most important for the future of Europe?

Most selected response shown



Base: N=25844 (All respondents)

Administrative boundaries: © EuroGeographics © UN-FAO © Turkstat
Cartography: Eurostat – IMAGE, 08/2024

Table 3.3: Most important issues for the future of Europe, by country (%)

	EU27	AT	BE	BG	HR	CY	CZ	DK	EE	FI	FR	DE	EL	HU	IE	IT	LV	LT	LU	MT	NL	PL	PT	RO	SK	SI	ES	SE
Security & peace	53	55	51	62	65	44	69	62	76	63	49	55	43	49	33	47	69	71	68	56	59	66	57	59	69	63	42	52
Economy, jobs, tackling poverty	42	33	40	56	58	63	33	27	51	43	38	34	64	42	42	52	54	44	43	34	28	36	47	54	41	45	53	28
Climate change & the environment	38	34	37	26	30	31	17	47	20	30	42	41	36	29	38	49	14	33	36	54	39	30	33	39	25	29	37	42
Migration/border control	37	43	41	24	25	57	45	34	31	26	43	40	37	29	45	32	30	36	29	45	42	44	34	25	27	37	36	35
Democracy, values, rights & rule of law	34	37	29	31	28	32	35	40	37	38	28	41	35	40	22	26	29	33	36	33	33	38	33	32	43	32	33	46
Availability/quality of public services	26	23	22	33	31	20	24	18	28	31	26	18	25	41	28	33	37	19	16	25	25	24	28	24	30	29	32	24
Fight against crime/terrorism	26	30	33	31	28	23	32	31	22	36	31	27	27	20	23	19	18	25	27	20	23	23	25	32	21	25	17	44
Availability/quality/affordability of housing	14	18	15	6	16	12	21	8	16	9	8	17	10	26	39	8	15	13	24	18	21	13	17	7	22	14	20	8
The EU's influence in the world	10	6	9	9	5	6	5	12	5	6	17	9	8	8	8	10	8	12	12	5	11	8	9	9	9	9	9	5
Digital transformation of economy and society	5	3	5	5	3	7	3	6	5	4	5	6	6	6	5	6	5	4	3	3	3	5	3	7	2	4	7	4

Base: N=25844 (All respondents)

Question: Which of the following issues do you think are the most important for the future of Europe?

Europe's security and peace generally held as the perceived most important issue dimension for the future of Europe at the sub-group level too, apart from among respondents with centre-right/right political values where it came second to migration and border control (Table 3.4). The latter issue was the second highest-ranking issue among most other groups, with the notable exception of the youngest age group (aged 18-24), who gave higher priority to climate change and the environment.

In terms of the other issue dimensions:

- the economy, jobs and tackling poverty was selected as the most important issue dimension by higher than average proportions of respondents aged 35-54;
- the availability/quality/affordability of housing was selected by higher than average proportions of younger cohorts (aged 18-34) and those with a low level of education;
- the fight against crime/terrorism was selected by higher than average proportions of respondents aged 55 and over, those with a low level of education and those with right/centre-right political values.
- democracy, values, rights and the rule of law was selected by higher than average proportions of respondents aged 55 and over, those with a high level of education and those with left/centre-left political values.
- the availability and quality of public services (like education and healthcare) was selected by higher than average proportions of respondents aged 35-44.

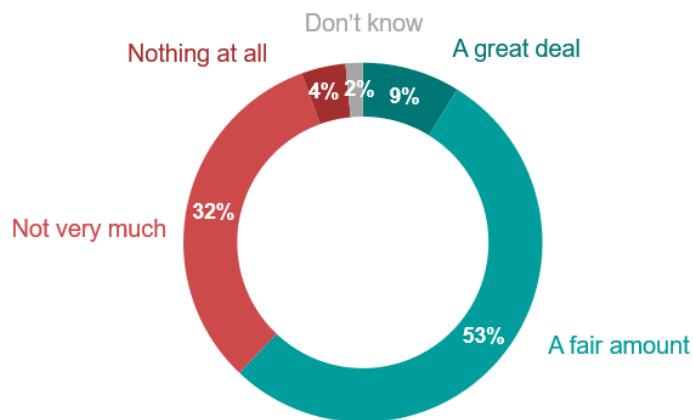
Table 3.4: Most important issues for the future of Europe, by key socio-demographics

	Age						Education			Political values			
	18-24	25-34	35-44	45-54	55-64	65+	Low	Mid	High	Right/ Centre-right	Centre	Centre-left/Left	No clear orientation
Security & peace	45%	45%	48%	53%	57%	63%	45%	53%	55%	55%	55%	51%	53%
Economy, jobs, tackling poverty	43%	43%	47%	47%	42%	34%	42%	42%	42%	42%	41%	42%	43%
Climate change & the environment	43%	41%	38%	36%	39%	37%	35%	37%	40%	17%	35%	52%	37%
Migration/border control	27%	28%	35%	41%	44%	42%	41%	40%	35%	59%	36%	27%	39%
Democracy, values, rights & rule of law	31%	31%	30%	31%	35%	40%	26%	33%	36%	30%	34%	37%	32%
Availability/quality of public services	27%	28%	29%	26%	24%	24%	26%	26%	26%	23%	25%	28%	27%
Fight against crime/terrorism	23%	21%	25%	25%	27%	29%	29%	28%	24%	34%	26%	21%	26%
Availability/quality/affordability of housing	19%	19%	16%	14%	11%	10%	18%	15%	13%	14%	14%	14%	14%
The EU's influence in the world	12%	13%	10%	7%	8%	10%	8%	9%	11%	7%	10%	11%	10%
Digital transformation of economy and society	7%	11%	6%	5%	3%	2%	4%	4%	7%	4%	5%	6%	5%

3.3 Understanding of the EU

Almost two-thirds of respondents (62%) said they understood a great deal or a fair amount about the European Union, while 36% said they understood little or nothing at all about it (Figure 3.5).

Figure 3.5: How much respondents understand about the EU (self-assessed)



Base: N=25844 (All respondents)

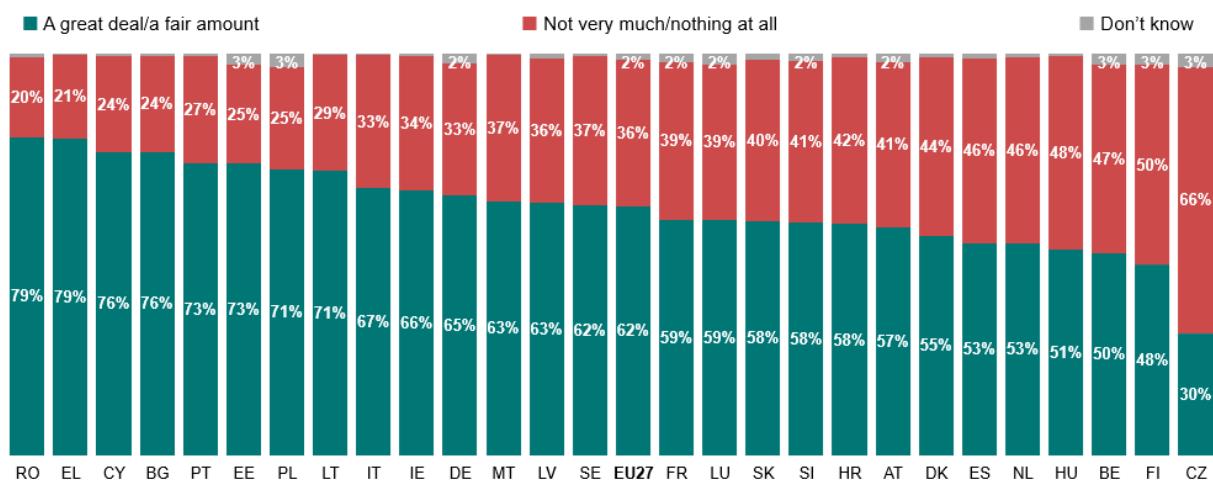
Question: How much, if anything, do you feel you understand about the European Union (the EU)?

Self-assessed understanding of the EU varied greatly by Member State (Figure 3.6). The highest levels of understanding were found in Romania and Greece, where almost four in five (79%) respondents in both cases said they understood a great deal or a fair amount, while only around one in five (20% and 21% respectively) said they knew little or nothing.

The lowest levels of understanding in contrast were found in:

- Czechia (where only 30% said they understood a great deal or a fair amount about the EU, versus 66% who said they understood little or nothing at all);
- Finland (48% vs. 50%);
- Belgium (50% vs. 47%);
- Hungary (51% vs. 48%).

Figure 3.6: How much respondents understand about the EU, by country



Base: N=25844 (All respondents)

Question: How much, if anything, do you feel you understand about the European Union (the EU)?

Understanding of the EU also varied significantly among different subgroups of respondents. The proportion saying they knew little or nothing was higher among:

- younger (18-24) and middle-aged (45-64) respondents (40% and 39%, vs., for instance, 32% of those aged 25-34 and 35% of those aged 35-44 and 65 and over);
- women (42% vs. 30% of men);
- respondents with lower education levels (52% vs. 29% of highly educated ones);
- those facing financial difficulties (42% vs. 31% of those who found it easy to manage on their income);
- those living *outside* of large towns and cities (42% in rural areas and 39% in small to medium-sized towns vs. 30% in large cities).

3.4 What the EU means to citizens

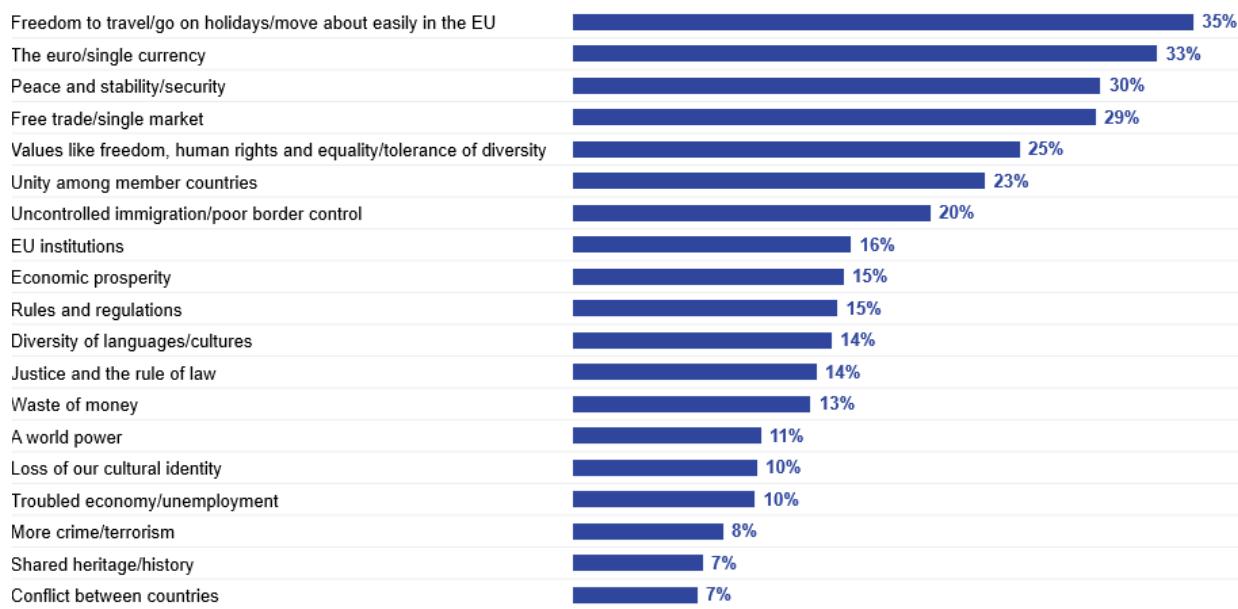
Respondents were presented with a list of phrases and asked which of these most represented the European Union to them. Overall, no single phrase resonated with more than around a third (35%) of the respondents. Rather, considerable diversity was apparent in how they conceived of the EU (Figure 3.4).

In relative terms, the most commonly selected associations were all positive and related to freedom of movement (35%), the euro/single currency (33%) and peace and stability/security (30%). Economic themes were also relatively prominent, with 29% associating the EU with free trade/the single market and 15% with economic prosperity.

Other associations ranged from positive concepts such as freedom, human rights and equality/tolerance of diversity (25%), and unity among member countries (23%), to more negative associations like uncontrolled immigration/poor border control (20%) and waste of money (13%).

Associations selected the *least* often, meanwhile, were more crime/terrorism (8%), shared heritage/history, and conflict between countries (7% in both cases).

Figure 3.4: What the EU means to citizens



Base: N=25844 (All respondents)

Question: From the list below, please select the phrases that most represent the EU to you.

Looking at the country-level results (Table 3.5):

- **Freedom of movement remained the most selected association in 15 out of the 27 EU Member States, including:** Lithuania (62%), Estonia (59%), Latvia (57%), Poland (49%), Slovakia (47%), Bulgaria (46%), Malta (45%), Croatia (45%), Romania (45%), the Netherlands (43%), Czechia (42%), Sweden (42%), Cyprus (40%), Germany (37%) and Hungary (34%);
- **The euro/single currency was the most selected association in ten of the remaining Member States, including several South European countries** – Greece (34%), Italy (34%) and Spain (32%) – as well as Luxembourg (49%), Finland (47%), Slovenia (47%), France (43%), Belgium (42%), Austria (41%) and Ireland (40%);
- **Peace and stability/security was the most selected association in Denmark (41%) and Greece (34%, ranking equally with the euro/single currency), while unity among member countries topped the ranking in Portugal (40%).**

Table 3.5: What the EU means to citizens, by country (%)

	EU27	AT	BE	BG	HR	CY	CZ	DK	EE	FI	FR	DE	EL	HU	IE	IT	LV	LT	LU	MT	NL	PL	PT	RO	SK	SI	ES	SE
Freedom to travel/go on holidays/move about easily	35	37	33	46	45	40	42	30	59	44	26	37	28	34	37	27	57	62	42	45	43	49	35	45	47	37	24	42
The euro/single currency	33	41	42	20	36	33	12	8	50	47	43	36	34	22	40	34	51	40	49	36	37	13	39	23	46	47	32	12
Peace and stability/security	30	31	24	27	29	32	23	41	37	33	27	33	34	24	25	25	33	38	44	29	36	34	34	29	28	30	27	36
Free trade/single market	29	31	26	35	40	30	28	26	37	26	21	31	23	30	34	33	34	30	38	32	33	32	32	29	34	37	25	38
Values like freedom, human rights and equality/tolerance	25	22	18	21	23	31	15	28	27	27	21	26	27	31	22	27	17	23	32	34	25	27	33	24	22	22	28	26
Unity among members	23	13	23	25	18	27	13	37	17	15	21	16	33	22	23	31	20	26	14	29	19	21	40	31	16	23	29	18
Uncontrolled immigration/poor border control	20	27	22	14	20	29	32	17	19	18	26	24	16	17	20	15	15	14	18	23	19	21	15	10	18	19	16	21
EU institutions	16	10	15	10	11	15	12	11	10	15	19	10	18	29	19	18	15	14	16	18	14	16	18	19	13	13	17	14
Economic prosperity	15	15	16	22	21	20	17	18	9	12	12	15	22	15	17	10	21	22	12	14	23	9	21	23	22	14	19	12
Rules and regulations	15	17	14	16	19	12	18	19	20	20	14	13	11	19	18	14	8	10	11	19	14	16	13	22	12	12	13	24
Diversity of languages/cultures	14	12	14	17	17	13	9	12	17	12	15	15	13	17	16	12	20	17	19	14	9	15	17	11	12	18	20	15
Justice and rule of law	14	12	10	14	16	15	7	14	11	17	8	16	19	24	12	10	10	12	10	21	11	20	14	14	13	16	17	14
Waste of money	13	20	17	15	9	6	26	10	11	16	16	15	9	10	7	11	12	9	13	6	13	14	5	7	12	11	9	21
A world power	11	4	12	8	6	8	6	8	4	2	22	4	10	4	9	10	4	7	4	4	8	9	10	16	6	5	14	8
Loss of our cultural identity	10	13	9	17	15	9	23	10	10	5	14	9	11	6	12	9	8	8	9	15	9	12	7	14	10	12	6	8
Troubled economy/unemployment	10	10	10	10	8	16	9	5	9	8	10	9	19	7	7	13	10	5	6	5	5	11	7	9	7	7	13	6
More crime/terrorism	8	14	8	9	8	7	14	9	3	11	12	10	7	9	5	5	3	3	11	3	4	8	4	6	6	8	7	12
Shared heritage/history	7	3	5	4	5	3	6	7	5	5	7	5	6	10	6	11	5	4	7	6	5	10	8	3	4	7	11	6
Conflict between countries	7	5	7	7	3	4	6	7	4	4	8	8	6	9	7	6	3	3	4	3	6	8	3	6	6	3	8	5

Base: N=25844 (All respondents)

Question: From the list below, please select the phrases that most represent the EU to you.

There was further variation in the top-ranking associations at the sub-group level (Table 3.6). For instance:

- Older respondents (aged 65 and above) most commonly associated the EU with peace and stability/security, followed by the euro and free trade/the single market. Among younger people, the top-ranking associations more closely reflected the aggregate level trend (freedom of movement, the euro, and free trade respectively);
- Respondents with low levels of education most commonly selected the euro/single currency, followed by uncontrolled immigration/poor border control and peace and stability/security. Among more highly educated respondents, the top-ranking associations were more in line with the aggregate-level trend (freedom of movement, the euro, and free trade respectively);
- Those with centre-right/right political values most strongly associated the EU with uncontrolled immigration/poor border control, followed by freedom of movement and free trade. This contrasted sharply with the responses of those with centre-left/left values, whose top three associations were the euro, freedom of movement, and peace respectively.

In terms of other differences at the subgroup level, older respondents (aged 65 and above) were more likely than younger respondents to associate the EU with values like freedom, human rights, and equality/tolerance of diversity. Younger respondents (aged 18-24), on the other hand, tended to gravitate more towards a vision of the EU as a world power characterised by unity among member countries and diversity of languages/cultures.

Respondents with lower education levels showed a greater inclination than those with a high level of education towards negative associations with the EU, including waste of money, loss of our cultural identity, and concerns about crime, immigration, and conflict between countries. Respondents with centre-right/right political values were also significantly more likely than those with left-leaning values to select negative associations, including uncontrolled immigration/poor border control as noted above, waste of money, and loss of our cultural identity. Conversely, respondents with centre-left/left political values were more likely to associate the EU with positive themes like unity and shared values.

Table 3.6: What the EU means to citizens, by key socio-demographics

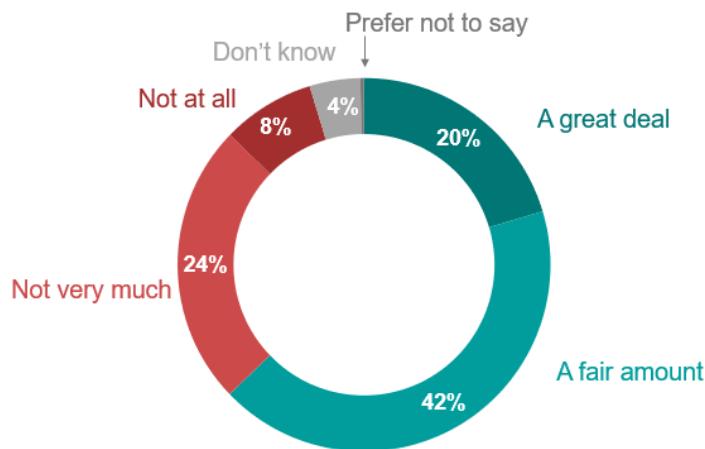
	Age						Education			Political values		
	18-24	25-34	35-44	45-54	55-64	65+	Low	Mid	High	Right/ Centre-right	Centre	Centre-left/Left
Freedom to travel/go on holidays/move about easily	36%	37%	36%	34%	33%	34%	22%	34%	38%	33%	36%	33%
The euro/single currency	31%	31%	31%	33%	33%	35%	29%	32%	34%	25%	35%	34%
Peace and stability/security	30%	24%	25%	28%	31%	35%	22%	29%	31%	22%	29%	33%
Free trade/single market	24%	30%	27%	29%	30%	32%	20%	27%	33%	29%	31%	28%
Values like freedom, human rights and equality/tolerance	24%	24%	23%	21%	25%	30%	20%	23%	27%	14%	24%	32%
Unity among members	27%	23%	22%	22%	23%	23%	23%	23%	23%	16%	23%	26%
Uncontrolled immigration/poor border control	11%	14%	18%	21%	24%	24%	24%	22%	18%	34%	17%	14%
EU institutions	20%	20%	17%	15%	14%	12%	12%	13%	18%	11%	16%	18%
Economic prosperity	13%	15%	14%	14%	15%	17%	13%	14%	17%	13%	15%	17%
Rules and regulations	16%	15%	16%	17%	14%	13%	14%	15%	15%	17%	15%	13%
Diversity of languages/cultures	22%	19%	15%	15%	11%	11%	12%	13%	16%	11%	14%	17%
Justice and rule of law	10%	12%	14%	12%	13%	17%	11%	14%	14%	8%	13%	16%
Waste of money	10%	10%	14%	14%	15%	15%	17%	15%	11%	25%	12%	9%
A world power	14%	14%	11%	10%	8%	9%	10%	10%	11%	7%	9%	13%
Loss of our cultural identity	7%	7%	10%	12%	12%	12%	13%	11%	10%	21%	8%	6%
Troubled economy/unemployment	10%	11%	11%	11%	10%	9%	13%	11%	9%	13%	9%	10%

	Age						Education			Political values		
	18-24	25-34	35-44	45-54	55-64	65+	Low	Mid	High	Right/ Centre-right	Centre	Centre-left/ Left
More crime/terrorism												
More crime/terrorism	6%	6%	8%	8%	10%	10%	12%	9%	7%	14%	6%	7%
Shared heritage/history	8%	9%	8%	6%	6%	7%	8%	6%	8%	5%	7%	8%
Conflict between countries	8%	8%	8%	7%	6%	6%	11%	8%	6%	8%	6%	7%

3.5 Perceived impact of EU membership

Nearly two-thirds of respondents (63%) believed their country had benefitted from EU membership, including 20% who felt it had benefitted *a great deal*. Meanwhile, around a third (32%) felt their country had not benefitted much or at all from membership (Figure 3.7).

Figure 3.7: How much their country has benefitted from being a member of the EU



Base: N=25844 (All respondents)

Question: Taking everything into account, how much, if at all, would you say that the country has benefitted from being a member of the European Union (EU)?

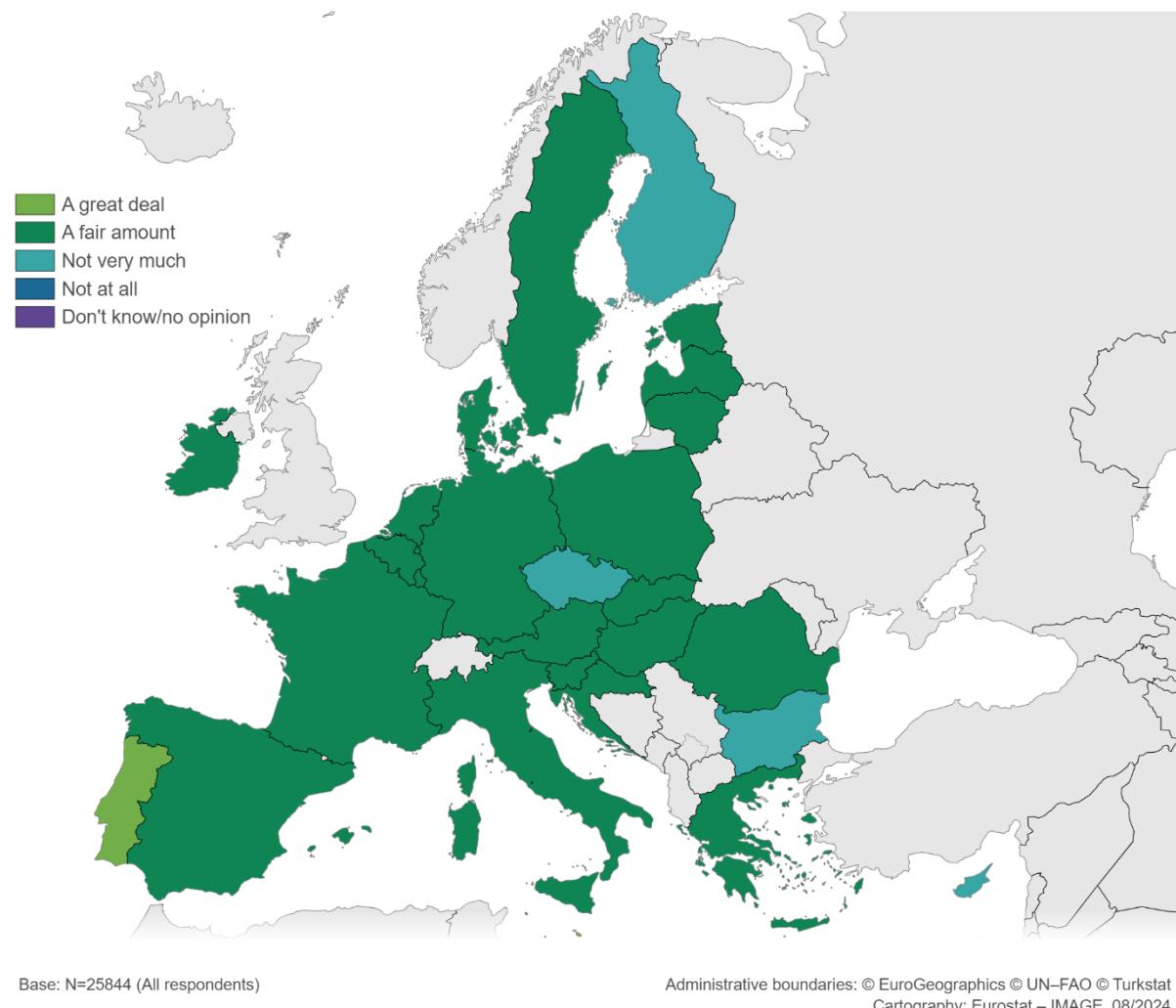
This predominantly positive sentiment was reflected in most EU Member States, as shown in Figure 3.8 below. Indeed, the proportion of respondents who felt their country had benefitted from membership rose to over two-thirds in ten countries – Denmark (67%), Slovakia (67%), Spain (71%), Luxembourg (74%), Poland (74%), Ireland (76%), Estonia (78%), Lithuania (82%), Malta (83%) and Portugal (86%).

However, a different picture emerged in Bulgaria, Czechia and Finland, where fewer respondents said their country had benefitted from EU membership than said it had not. (Figure 3.9).

Figure 3.8: How much their country has benefitted from being a member of the EU – most selected response by country

Q5 Taking everything into account, how much, if at all, would you say that the country has benefitted from being a member of the European Union (EU)?

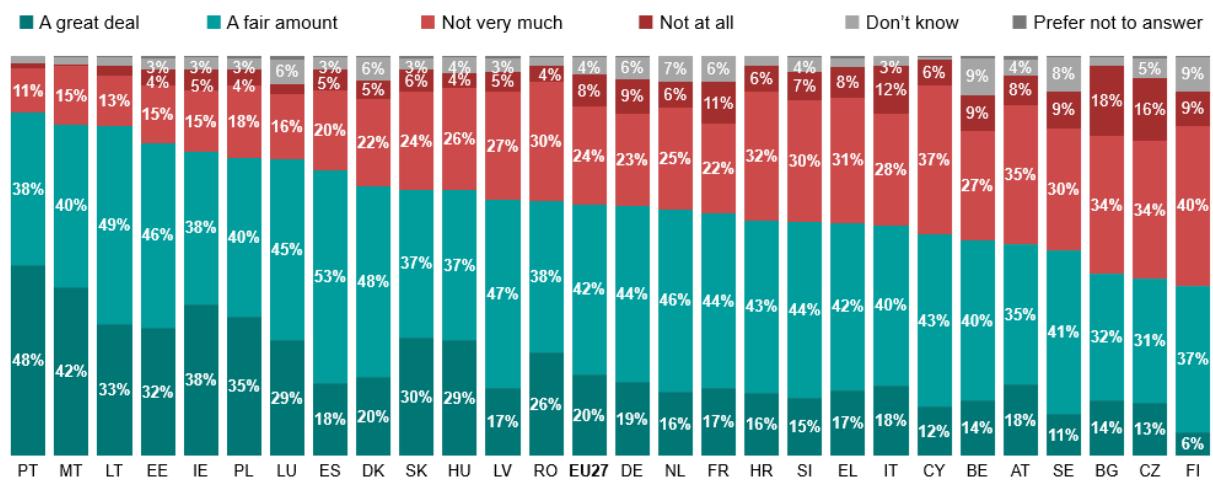
Most selected response shown



Base: N=25844 (All respondents)

Administrative boundaries: © EuroGeographics © UN–FAO © Turkstat
Cartography: Eurostat – IMAGE, 08/2024

Figure 3.9: How much their country has benefitted from being a member of the EU, by country



Base: N=25844 (All respondents)

Question: Taking everything into account, how much, if at all, would you say that the country has benefitted from being a member of the European Union (EU)?

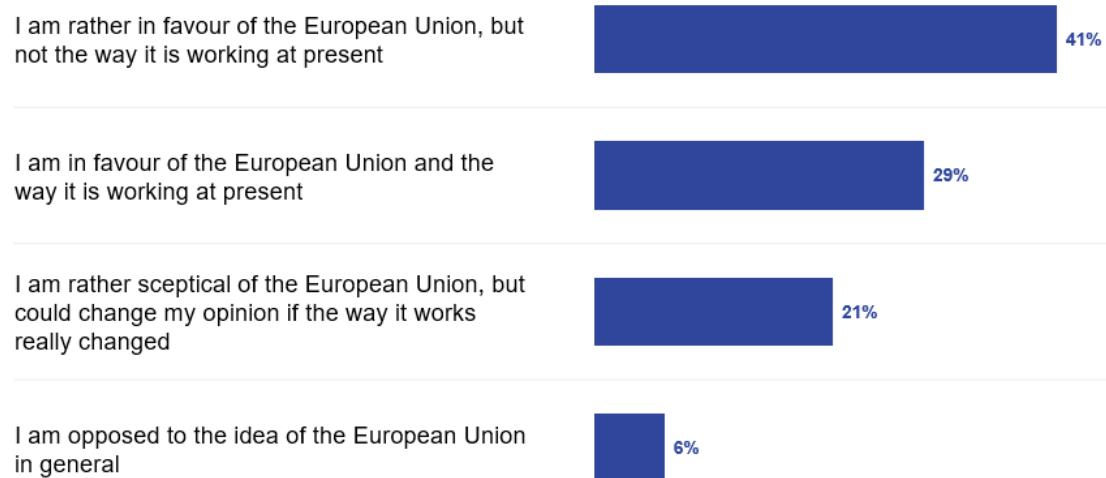
At the subgroup level, positive sentiment towards EU membership was *more common* among:

- residents of large cities (69% vs. 57% of those living in rural areas);
- younger groups aged 18-24 (68% vs. 63% of those aged 65 and over);
- respondents finding it easy to manage on their income (70% vs. 55% of those finding it difficult to manage);
- respondents with a high level of education (70% vs. 47% of those with low educational attainment);
- respondents with centre-left/left political values (73% vs. 47% of those with centre-right/right political values).

3.6 Favourability towards the EU

Seven in ten (69%) respondents were generally in favour of the EU – though this included 41% who were unhappy with the way the EU was working, and a somewhat lower proportion (29%) who were happy. A further 21% of respondents were rather sceptical of the EU but said they could change their opinion if the way it worked really changed. Six percent were opposed to the general idea of the EU (Figure 3.10).

Figure 3.10: Favourability towards the EU

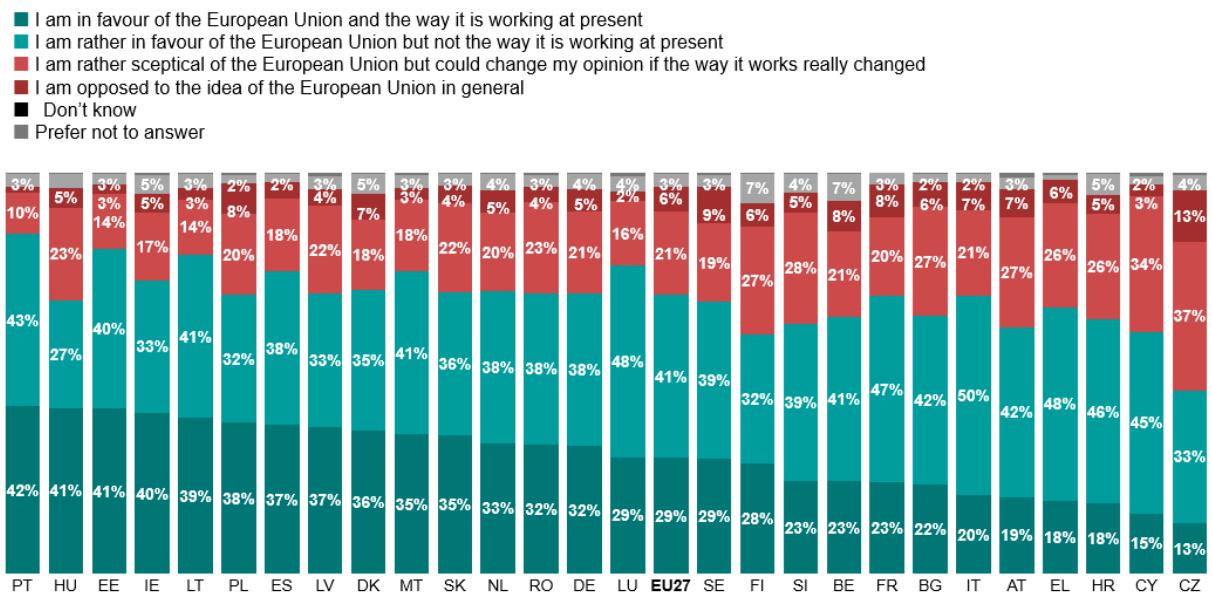


Base: N=25844 (All respondents)

Question: Which of the following statements regarding the European Union (EU) is closest to your opinion?

The proportion of respondents generally in favour of the EU reached a majority in all but one Member State (Czechia, where the figure was 46%). Notably though, the proportion in favour of the EU *and* happy with the way it was working never reached more than 42% in any country, while the proportion in favour of the EU but *unhappy* with the way it was working ranged from 27% (in Hungary) to around 50% (in Luxembourg, France, Italy and Greece). The proportion who were rather sceptical towards the EU ranged from 10% (in Portugal), to 37% (in Czechia), while the proportion opposed to the EU remained below the 10% mark in all countries apart from Czechia (where it stood at 13%) (Figure 3.11).

Figure 3.11: Favourability towards the EU, by country



Base: N=25844 (All respondents)

Question: Which of the following statements regarding the European Union (EU) is closest to your opinion?

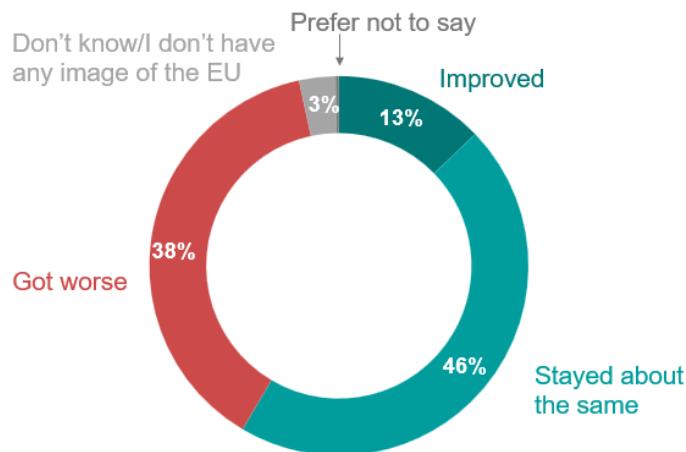
At the subgroup level, general favourability towards the EU held at a majority level irrespective of respondents' gender, age, level of education, location, financial status or political values. However, in absolute terms it was higher among:

- males (71% versus 68% of females);
- people aged up to 44 and 65+ (e.g. 72% of 18-24 year olds and 71% of those aged 65+ vs. 66% of those aged 45-64);
- those with a higher level of education (76% vs. 57% of those with a low level of education);
- those living in a large town or city (75% vs. 64% vs. in rural areas);
- those who found it easy to manage on their income (76% vs. 63% of those who found it difficult to manage);
- those with left/centre-left political values (78% vs. 52% of those with right/centre-right political values).

3.7 Evolution of EU image over the last five years

Approaching half (46%) of respondents said their image of the EU has remained stable over the last five years, while 38% said it has got worse and 13% said it has improved. Three per cent were unsure (Figure 3.12).

Figure 3.12: Evolution of the EU image over the last five years

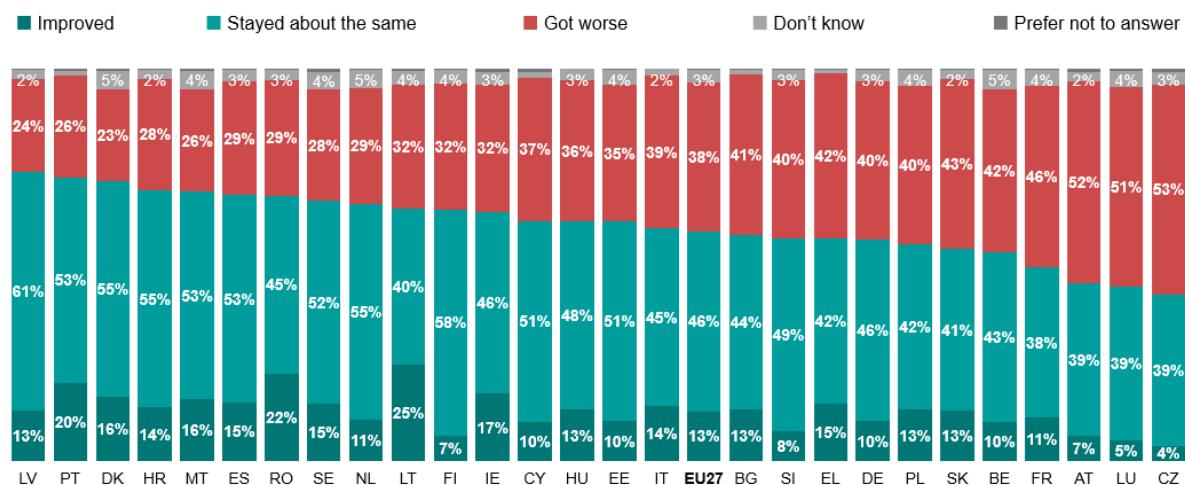


Base: N=25844 (All respondents)

Question: Over the last five years, would you say that the image you have of the European Union (EU) has improved, got worse or stayed about the same?

The total proportion of respondents who said their image of the EU had stayed the same or improved in the last five years reached a majority (of between 53% and 74%) in all but four Member States. The four were France, Austria, Luxembourg and Czechia, where around half of respondents said their image of the EU had worsened (Figure 3.13).

Figure 3.13: Evolution of the EU image over the last five years, by country



Base: N=25844 (All respondents)

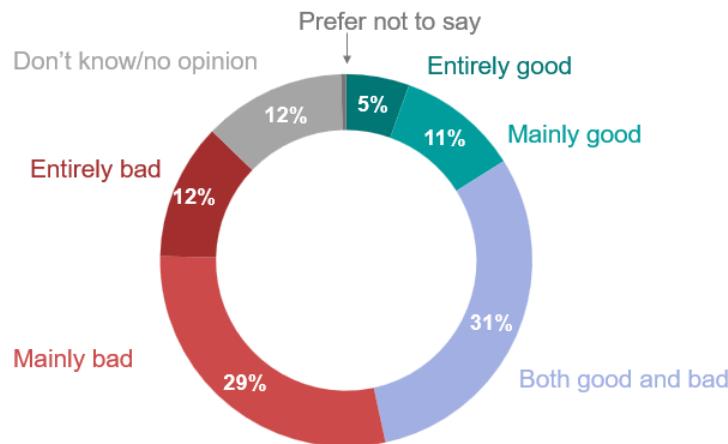
Question: Over the last five years, would you say that the image you have of the European Union (EU) has improved, got worse or stayed about the same?

Respondents aged 45 and over were more likely than younger groups to say their image of the EU had worsened – for example, 42% of those aged 45-54 said this compared to 32% of those aged 18-24. The sentiment was also more common among people living in rural areas (41% vs. 33% of those living in large towns or cities) and those who were finding it difficult to manage on their income (44% vs. 33% of those who were finding it easy to manage). Further, the figure rose to a majority among those with right/centre-right political values (61% vs. 29% of those with left/centre-left values).

3.8 Brexit and its implications for the EU

To further understand views on the recent evolution of the EU, respondents were asked whether they felt Brexit had been a good or a bad thing for the Union. As Figure 3.14 shows, the results were mixed: **41% said Brexit had been a bad thing, while 31% said it had been both good and bad, and a further 16% said it had been good.** Twelve percent did not feel able to give an opinion.

Figure 3.14: Brexit – a good or bad thing for the EU?

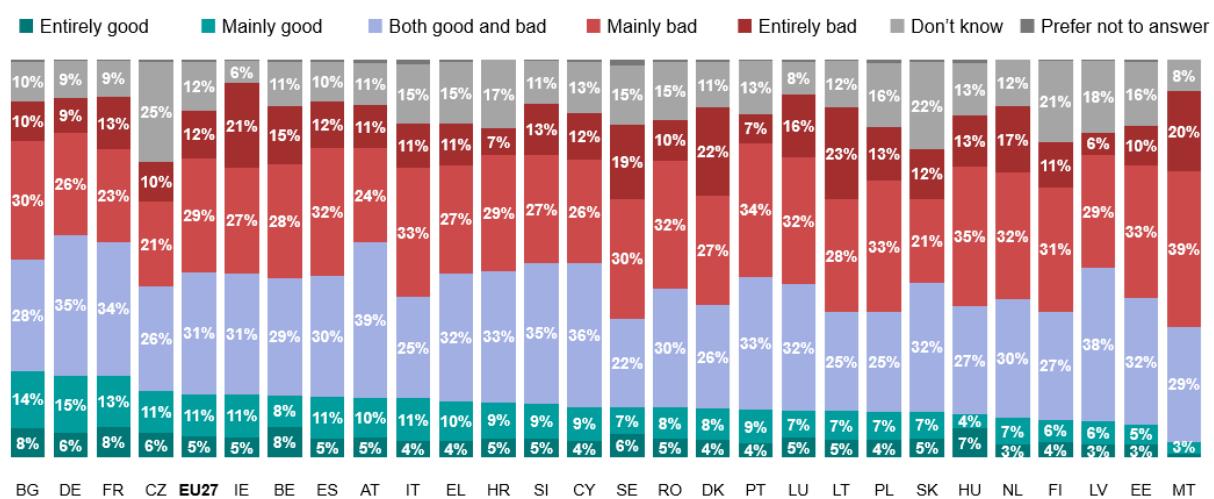


Base: N=25844 (All respondents)

Question: In your opinion, was Brexit a good thing or a bad thing for the EU?

This mixed outlook was replicated in most Member States. That said, the proportion regarding Brexit as a bad thing for the EU reached a majority in two countries: Malta (59%) and Lithuania (51%). The figure was also notably higher than average in Denmark (49%), Sweden (49%), the Netherlands (49%), Ireland (48%), Hungary (48%) and Luxembourg (48%). In contrast, respondents in Bulgaria, France and Germany were almost two times more likely than average to say that Brexit had been *good* for the EU (22%, 21% and 21% respectively) (Figure 3.15).

Figure 3.15: Brexit – a good or bad thing for the EU?, by country



Base: N=25844 (All respondents)

Question: In your opinion, was Brexit a good thing or a bad thing for the EU?

Mixed views generally characterised the picture at the sub-group level too. Still, it was notable that respondents aged 65 and over were among the most negative about Brexit (45% of them felt it had been bad for the EU), particularly when compared to those aged 25-34 and 35-44 (37% and 38% respectively). Views were also more negative than average among respondents with a high level of education (45% vs. 33% of those with a low level of education), those with a higher subjective

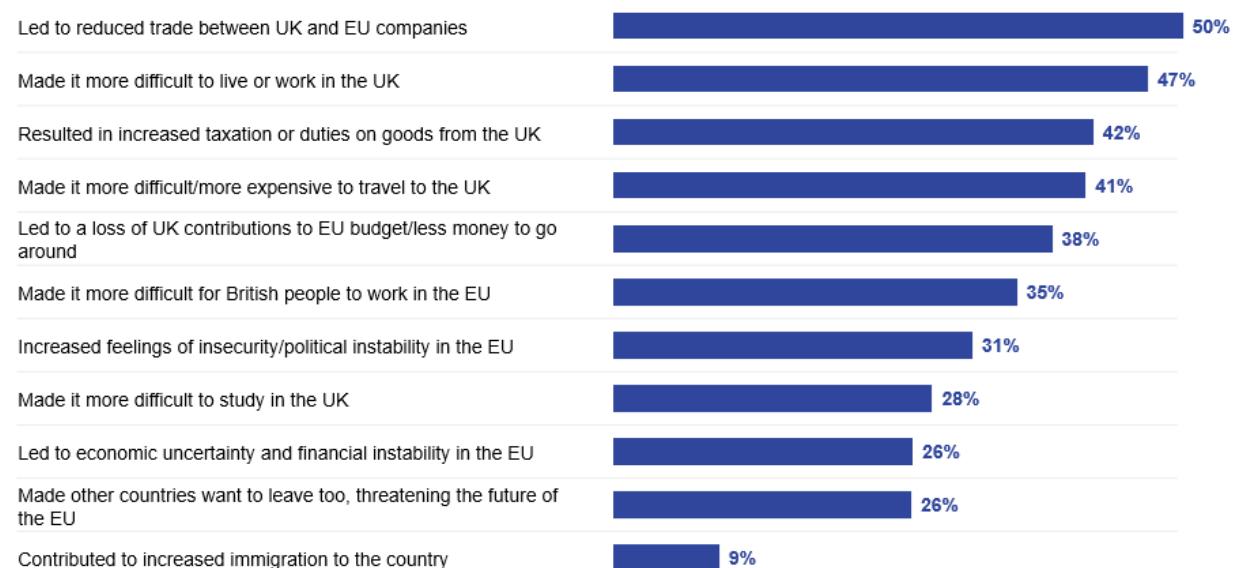
understanding of the EU (44% vs. 35% of those with a lower or no understanding), and those with left/centre-left political values (43% vs. 38% of those with right/centre-right values).

3.8.1 Reasons Brexit was seen as bad for the EU

Respondents who said Brexit had been bad for the EU cited a variety of reasons for this. **A particularly prominent set of reasons concerned the impact of Brexit on trade and commerce**, with half (50%) of the respondents mentioning reduced trade between UK and EU companies, and 42% mentioning increased taxation or duties on goods coming from the UK. Negative impacts on freedom of movement were also commonly mentioned: 47% said Brexit had made it more difficult to live or work in the UK, 41% said it had made travel to the UK more difficult and/or expensive, and 35% said it had made it more difficult for British people to work in the EU (Figure 3.16).

Other negative impacts of Brexit mentioned with relative frequency were the loss of UK contributions to the EU budget (38%) and increased feelings of insecurity or political instability in the EU (31%).

Figure 3.16: Reasons Brexit was seen as bad for the EU



Base: N=10851 (Believe Brexit was a bad thing)

Question: You said you believe that Brexit was an entirely or mainly bad thing. Why do you feel this way?

There were some notable regional patterns of response to this question. In particular:

- *Reduced trade* was mentioned by higher than average proportions of respondents in North European countries – including the Netherlands (63%), Denmark (60%), Ireland (60%), Finland (56%) and Estonia (56%) – as well as in Luxembourg (63%), Malta (60%), Germany (55%) and Poland (55%).
- *Increased taxation or duties on goods* was similarly mentioned by a majority of those in the aforementioned countries, as well as in Cyprus (57%), Belgium (52%) and Sweden (52%).
- *The loss of the UK's contribution to the EU budget* received particularly high mention in East European and Baltic countries, with the figure rising to over 50% in Estonia (52%), Hungary (53%), Latvia (54%) and Lithuania (55%).
- *The issue of insecurity or political instability* in the EU received highest mention in the eastern flank countries of Poland (46%), Croatia (46%) and Bulgaria (45%).

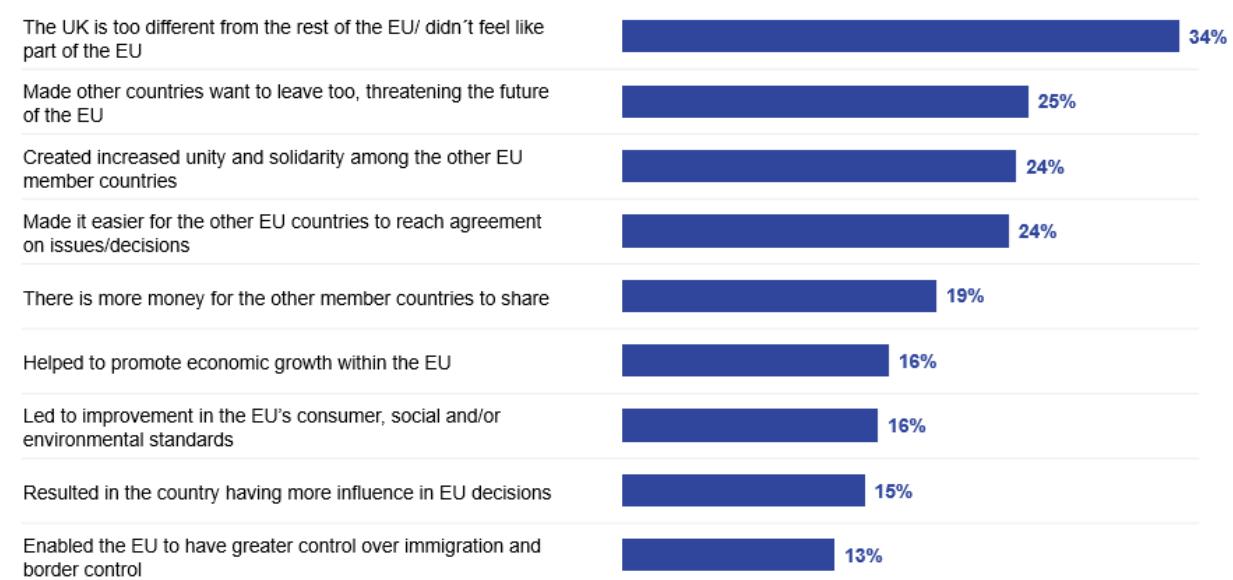
Beneath these county-level findings, respondents aged 65 and over were much more likely than other age groups to mention that Brexit had meant the loss of UK contributions to the EU budget (47% vs. 38% on average), had reduced trade between the UK and the EU (55% vs. 50%) and had made it more difficult for EU citizens to work in the UK (41% vs. 35%). Younger people were more likely than average to mention that Brexit had made it more difficult to study in the UK (33% of 18-24 year olds vs. 28% on average) and to travel there (48% of 25-34 years old vs. 41% on average).

Difficulties studying in and travelling to the UK also received higher than average mention among respondents with left-leaning political values (32% and 43% respectively). This group was also more likely than average to mention that Brexit had made it harder to work in the UK (51% of them mentioned this vs. 41% of those with right-leaning values), had reduced trade between the EU and the UK (52% vs. 46%), and had resulted in increased taxation or duties on good from the UK (45% vs. 41%).

3.8.2 Reasons Brexit was seen as good for the EU

Those respondents who said Brexit has been a good thing for the EU similarly cited a variety of reasons for their position. **The most common such reason, mentioned by over a third (34%), was that the UK was too different from the rest of the EU or had never felt part of the EU.** The next most common reasons were that Brexit resulted in other countries considering leaving the EU too (25%); that it created increased unity and solidarity among the other EU countries (24%); and that it made it easier for those other countries to reach agreement on issues/decisions (24%). Economic considerations were also relatively prominent, with around one in five of the respondents saying that Brexit meant more money was available for other member countries (19%) and had helped promote economic growth within the EU (16%) (Figure 3.17).

Figure 3.17: Reasons Brexit was seen as good for the EU



Base: N=3530 (Believe Brexit was a good thing)

Question: You said you believe that Brexit was an entirely or mainly good thing. Why do you feel this way?

The proportion saying that the UK was too different from the rest of the EU rose to around the 50% mark or higher in several countries, including Belgium (48%), Bulgaria (48%), Greece (54%), Luxembourg (66%) and Cyprus (76%). Meanwhile, mention of the fact that Brexit had made other countries want to leave peaked at 46% in Sweden and was also notably higher than average in Finland (35%), Germany

(35%) and Poland (33%). Respondent in Hungary and Germany were around two time more likely than average to say Brexit had created increased unity and solidarity among the other countries (46% and 34% respectively).

At the subgroup level, it was notable that older respondents aged 55+ were almost two times more likely than younger groups to say that the UK was too different from, or had never felt part of, the EU. Indeed half of those aged 65 and over said this, compared to, for example, less than a quarter (24%) of those aged 25-34. The latter age-group, meanwhile, were much more likely than other age groups to say that Brexit had meant more money was available for other countries (32% vs. 19% on average).

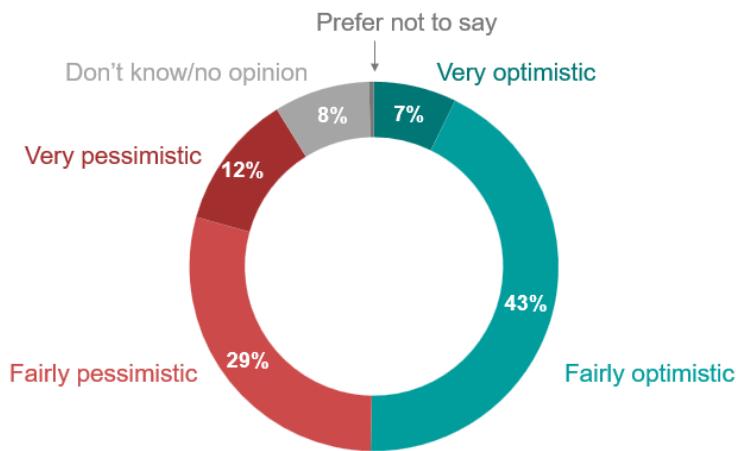
Respondents who were opposed to the EU in principle were among those most likely to say that Brexit was a good thing because it had resulted in other countries wanting to leave the EU too (42% vs. 25% on average). This sentiment was also more common than average among respondents with right-leaning political values and those with no clear political orientation (29% and 35% respectively vs. 22% of those with left-leaning political values).

3.9 Views on the future of the EU

3.9.1 Optimism versus pessimism

In total, half of all respondents said they were optimistic about the future of the EU, while 41% said they were pessimistic and the remainder declined to give a response (Figure 3.18).

Figure 3.18: Feelings about the future of the EU

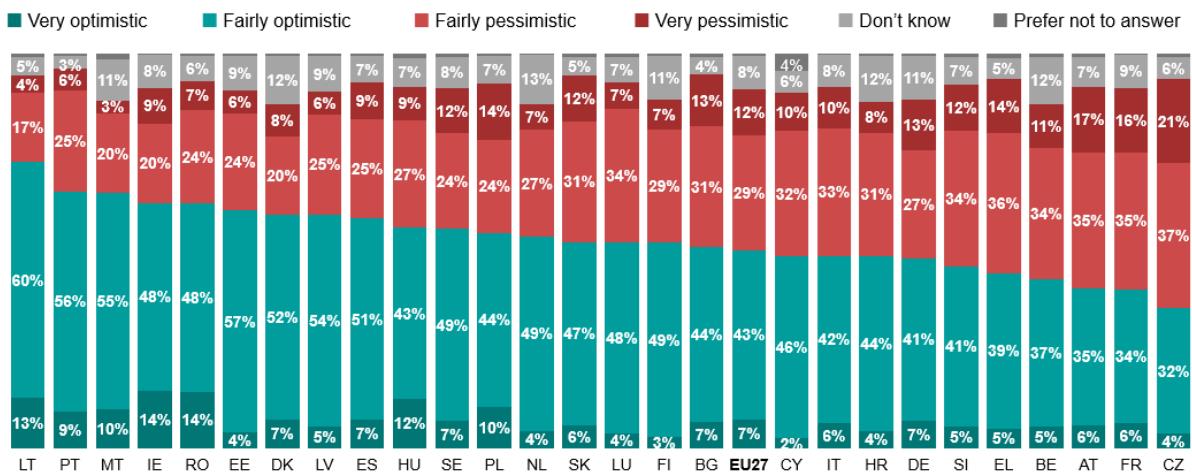


Base: N=25844 (All respondents)

Question: Would you say that you are very optimistic, fairly optimistic, fairly pessimistic or very pessimistic about the future of the European Union (EU)?

Optimism rose to over 60% in six Member States – Estonia (60%), Romania (62%), Ireland (62%), Malta (65%), Portugal (65%) and Lithuania (73%) – but fell below the 50% mark in ten others: Cyprus (49%), Italy (49%), Croatia (49%), Germany (48%), Slovenia (46%), Greece (44%), Belgium (43%), Austria (41%), France (40%) and Czechia (36%) (Figure 3.19).

Figure 3.19: Feelings about the future of the EU, by country



Base: N=25844 (All respondents)

Question: Would you say that you are very optimistic, fairly optimistic, fairly pessimistic or very pessimistic about the future of the European Union (EU)?

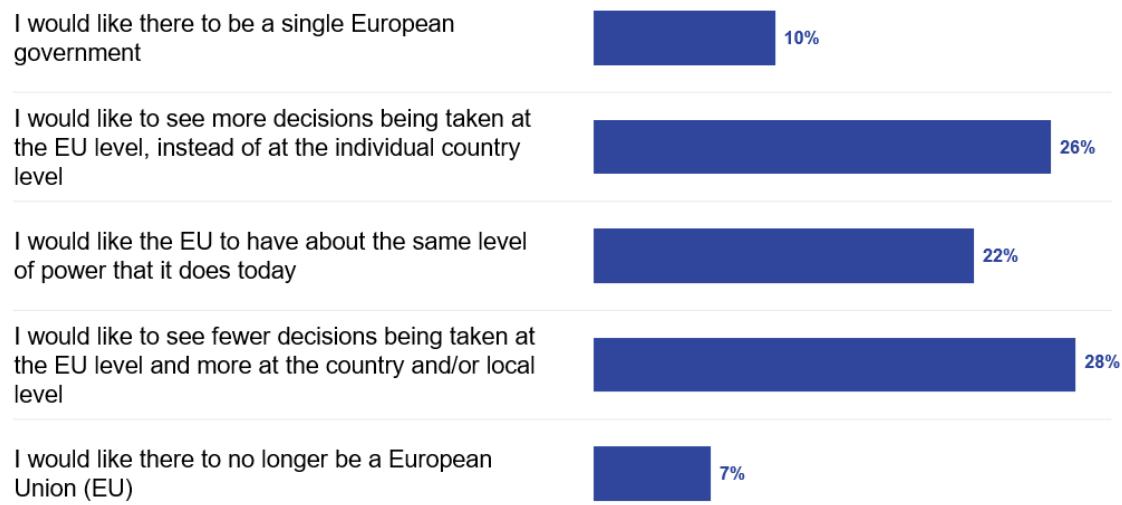
At the subgroup level, patterns of responding mirrored to an extent those observed for the questions on favourability towards the EU (section 3.6) and the evolution of the EU's image (section 3.7). Thus optimism was at its highest among:

- people aged 25-34 and 65 and over (56% and 54% respectively vs., for example, 45% of those aged 44-54);
- those with a high level of education (54% vs. 45% of those with a low level of education);
- those living in large towns or cities (57% vs. 45% of those in rural areas);
- those finding it easy to manage on their income (59% vs. 42% of those finding it difficult to manage);
- those with left-leaning political values (60% vs. 33% of those with right-leaning values).

3.9.2 Visions for the EU's decision-making powers by 2030

Respondents offered differing visions for the EU's future decision-making powers. Overall though, there was a clear appetite for some form of change. Around a third (36%) in total favoured an enhancement of the EU's powers, including 10% who favoured a single European government. Another third (35%) wanted to see fewer decisions taken at the EU level and more at the Member State level. This included 7% who wanted to see the EU abolished entirely. Fewer than a quarter (22%) of respondents wanted the EU to maintain about the same level of power as at present (Figure 3.20).

Figure 3.20: Visions for the EU's decision-making powers by 2030

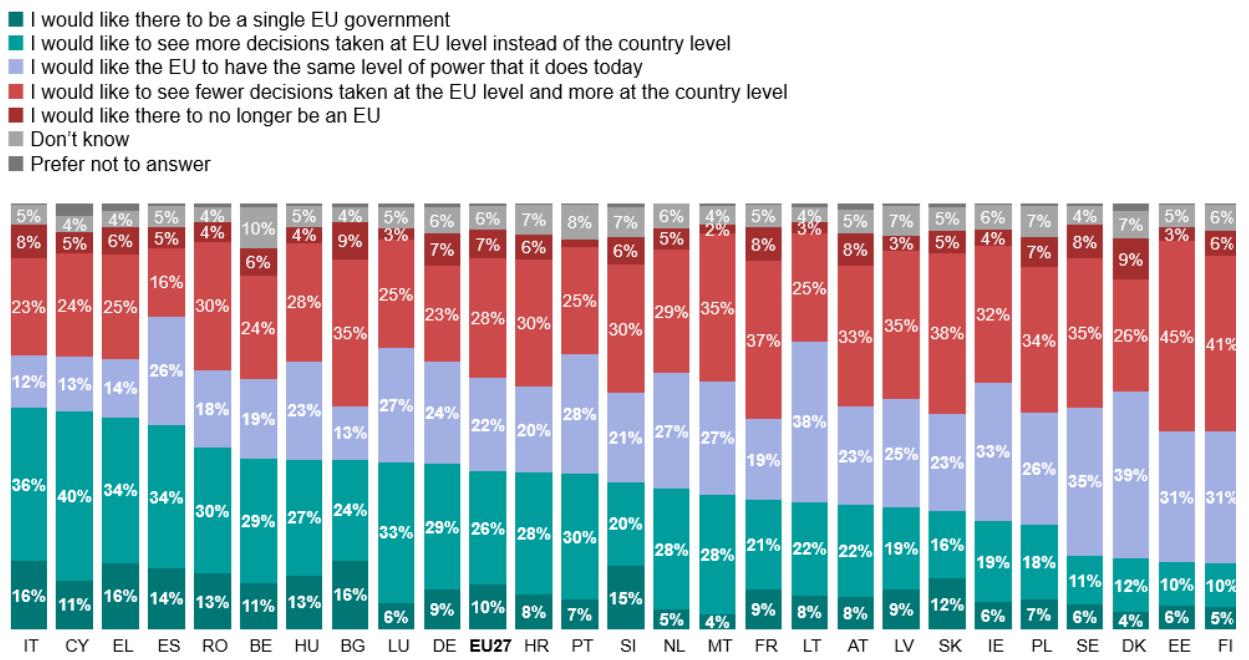


Base: N=25844 (All respondents)

Question: Which of the following most closely reflects your view of how the European Union (EU) should look by 2030? By 2030...

This appetite for change was reflected in all Member States, with the proportion of respondents favouring a continuation of the status quo never reaching 40% (Figure 3.21). **In over half of the Member States, more respondents favoured a reduction than an increase in EU level decision-making.** This was most notably the case in Czechia (where 61% wanted fewer decisions to be made at the EU level), Estonia (48%), Finland (47%) and France (45%). The only Member States where more respondents favoured an increase than a decrease in EU-level decision making were Italy (where 52% favoured an increase), Cyprus (51%), Greece (50%), Spain (48%), Romania (43%), Belgium (40%), Hungary (40%), Luxembourg (39%), Germany (39%) and Portugal (36%). Even in these countries, though, sentiment was mixed overall.

Figure 3.21: Visions for the EU's decision-making powers by 2030, by country



Base: N=25844 (All respondents)

Question: Which of the following most closely reflects your view of how the European Union (EU) should look by 2030? By 2030...

Subgroups more likely to favour a reduction than an increase in EU-level decision making included:

- people aged 45 and over (40% of 45-54 year olds and 55-64 years olds, and 37% of those aged 65 and over);
- those living in rural areas (40%);
- those who felt their country had not benefitted from EU membership (64%);
- those with right-leaning political values (61%);
- those who were rather sceptical about the EU (66%) or entirely opposed to it (88%).

In contrast, support for an increase in EU-level decision making was higher than average (though consistently short of a majority) among:

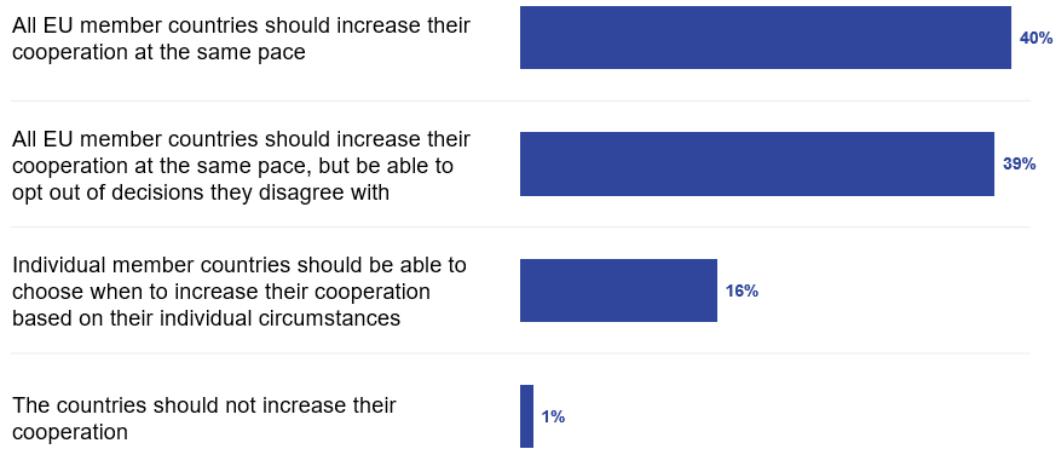
- younger people (44% of those aged 18-24 and 25-34);
- those living in large towns and cities (42%);
- those who felt their country had benefited from EU membership (47%);
- those in favour of the EU (47%);
- those with left-leaning political values (48%).

3.9.3 Views on the future pace of EU integration

Of those respondents who were in favour of the EU having more or about the same level of power as at present, almost four in five (79%) favoured a single-speed EU, in which all Member States increased their cooperation at the same pace. That said, roughly half of these respondents also felt that countries should be able to *opt out* of decisions with which they disagreed (Figure 3.22).

A further 16% of respondents favoured a more pluralistic approach to integration, with individual countries able to choose when to increase their cooperation based on their individual circumstances.

Figure 3.22: Views on the future pace of EU integration



Base: N=14650 (Those who believe the EU should have more, or about the same level of, decision-making power)

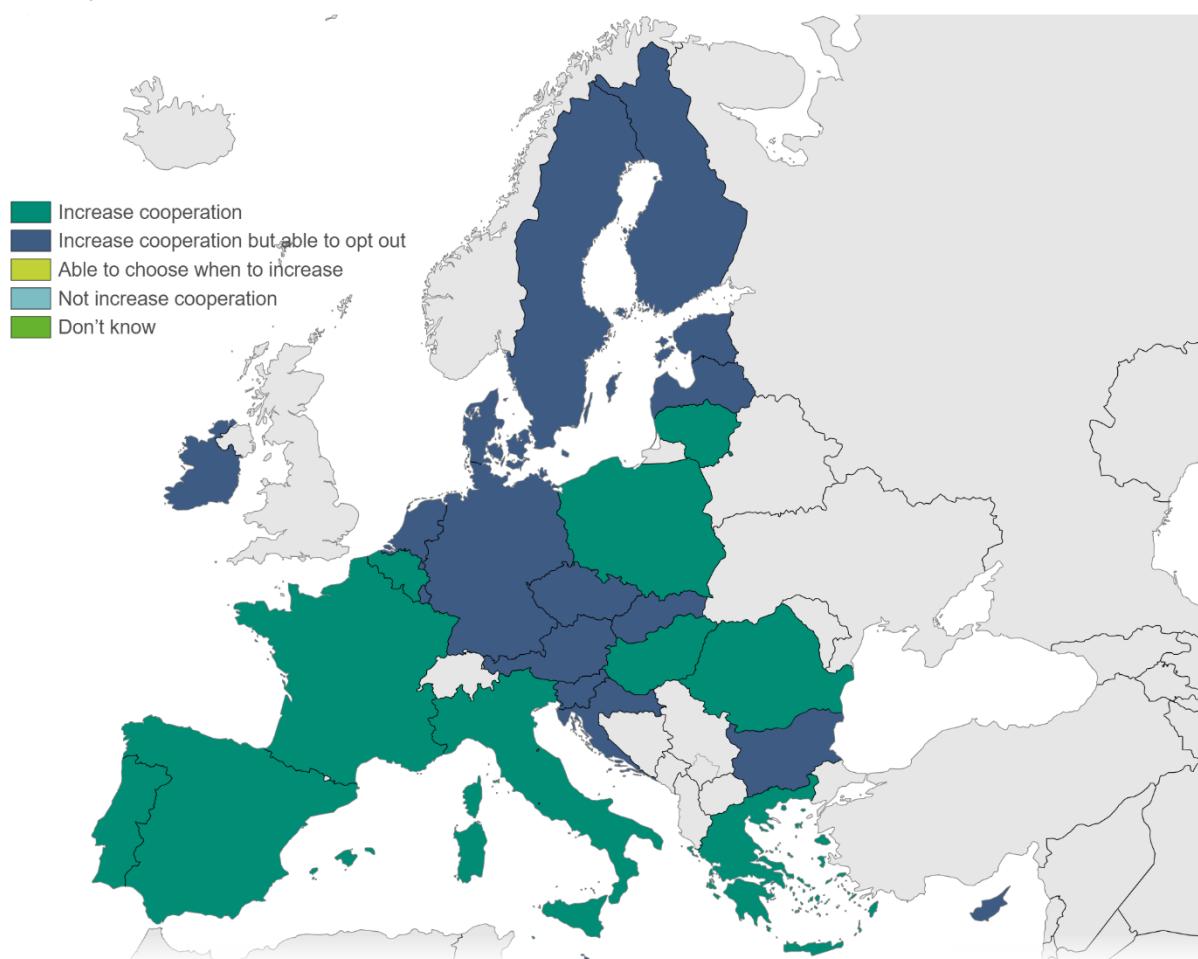
Question: Some current EU member countries would like to increase their cooperation. Which of the following best reflects your view on how current EU member countries/these countries should go about increasing their cooperation on issues affecting Europe?

Support for a single-speed Europe held at a majority level in all Member States (Figure 3.23), with the precise figure ranging from 64% (in Denmark) to 89% (in Lithuania). At the same time though, around a third in all States believed that countries should be able to opt out of decisions with which they disagreed. A further 10%-30% believed individual member countries should be able to choose when to increase their cooperation based on their individual circumstances, with this perspective being most common in Czechia (30%), Denmark (28%), Malta (27%), Portugal (25%) and Sweden (24%) (Figure 3.24).

Figure 3.23: Views on the future pace of EU integration, by country

Q10 Some current EU member countries would like to increase their cooperation. Which of the following best reflects your view on how current EU member countries/these countries should go about increasing their cooperation on issues affecting Europe?

Most selected response shown

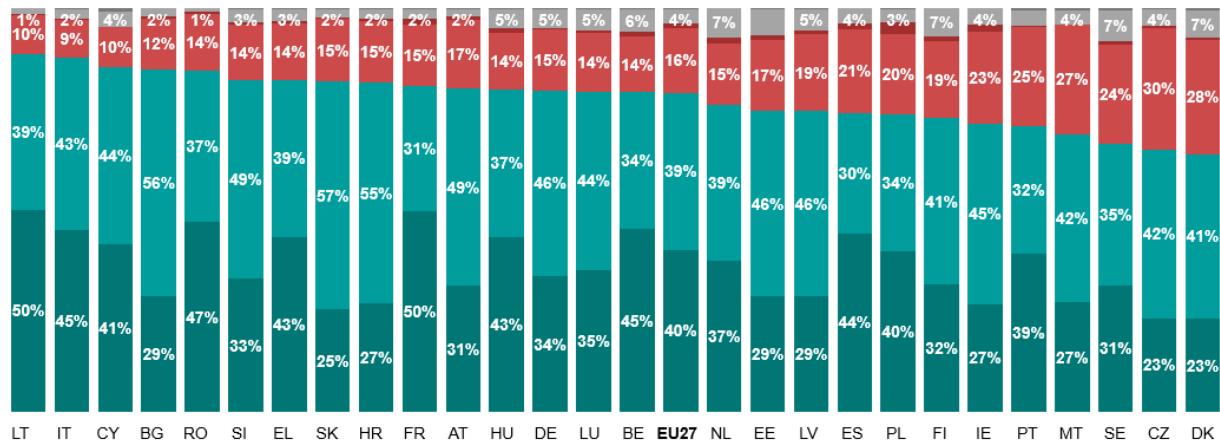


Base: N=14650

Administrative boundaries: © EuroGeographics © UN-FAO © Turkstat
Cartography: Eurostat – IMAGE, 08/2024

Figure 3.24: Views on the future pace of EU integration, by country

- All EU member countries should increase their cooperation at the same pace
- All EU member countries should increase their cooperation at the same pace but be able to opt out of decisions they disagree with
- Individual Member countries should be able to choose when to increase their cooperation based on their individual circumstances
- The countries should not increase their cooperation
- Don't know
- Prefer not to answer



Base: N=14650 (Those who believe the EU should have more, or about the same level of, decision-making power)

Question: Some current EU member countries would like to increase their cooperation. Which of the following best reflects your view on how current EU member countries/these countries should go about increasing their cooperation on issues affecting Europe?

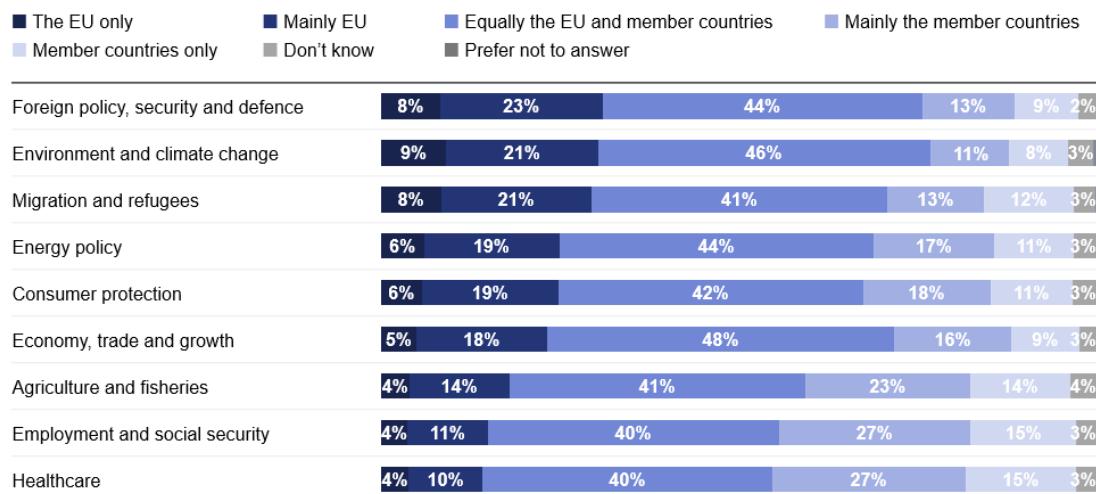
Analysis of the results by age reveals a fairly nuanced picture. On the one hand, *unequivocal* support for a single-speed Europe increased with age, from 32% among those aged 18-24, to 46% among those aged 65 and over. On the other hand, the view that member countries should be able to opt out of decisions they disagreed with decreased with age, from 45% among those aged 18-24 to 36% among those aged 65 and over.

Unequivocal support for a single-speed Europe was also higher than average among those with left-leaning political values (45% vs. 36% of those with other political outlooks). In contrast, those with right-leaning values displayed a higher than average propensity to say that individual countries should be able to choose when to increase their cooperation (20% vs. 13% of those with left-leaning values).

3.9.4 Preferred governance levels for different policy areas

Respondents were presented with a list of policy areas and asked which level of government – the EU or the national level – was best placed to deal with each. Although the results provide a somewhat mixed picture, **a majority of respondents saw at least some role for the EU in each of the areas, albeit not necessarily a dominant role**. At least seven in ten saw a role for the EU in the environment and climate change (76%); foreign policy, security and defence (75%); the economy, trade and growth (71%); and migration and refugees (70%). A similar proportion saw a role for the EU in the areas of energy policy (69%) and consumer protection (67%). Somewhat fewer, though still a majority, saw a role for the EU in agriculture and fisheries (59%); employment and social security (55%); and healthcare (54%).

Figure 3.25: Preferred governance levels for different policy areas



Base: N=25844 (All respondents)

Question: In your opinion, which level is best placed to deal with each of the following areas?

For the most part, the mixed results reported in Figure 3.25 were broadly replicated at the Member State level. However, it was notable that:

- the proportion of respondents who felt employment and social security was best dealt with only or mainly at the member country level rose to a majority in France (52%), Sweden (55%), Denmark (56%), Czechia (57%) and Finland (64%), and to just under this level in the Netherlands (49%), Belgium (49%) and Ireland (46%).
- A very similar picture emerged for healthcare: A majority in the Scandinavian countries – Sweden (62%), Denmark (57%) and Finland (70%) – as well as in the Netherlands (52%) and Czechia (61%) felt this policy area was best dealt with mainly or only at the country level. Almost half of those in Belgium (48%), Austria (48%) and France (47%) felt the same way.
- A majority in Czechia (52%) and Finland (56%) also felt that agriculture and fisheries were best dealt with only or mainly at the country level, as did a higher than average proportion of respondents in Sweden (47%), Austria (45%), Bulgaria (43%) and France (40%).

Generally mixed views were also found among the various respondent subgroups too, though it was notable that respondents with right-leaning political values were consistently more likely than those with left-leaning values to feel that the policy areas should be dealt with solely or mainly at the country level. The difference was especially marked in relation to healthcare and employment/social security. In both cases, more than half (58%) of those with right-leaning values supported predominantly country-level control, compared to only around a third (34%) of those with left-leaning values. A majority of those with right-leaning values similarly favoured predominantly county-level control of agriculture (54%), compared to 28% of those with left-leaning values.

4 ATTITUDES TOWARDS EU ENLARGEMENT

This chapter details respondents' views on past EU enlargement rounds and their general openness to further enlargement in the future. It then considers their level of support for *specific* countries joining the EU, and their views on the likely impact of this.

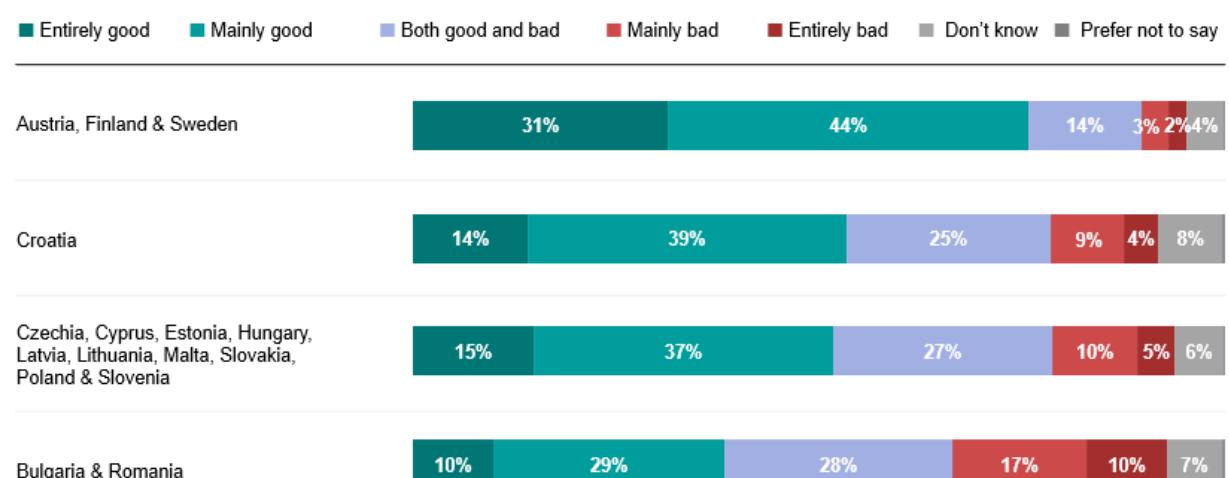
4.1 Views on past enlargement rounds

Respondents were informed about the four main rounds of EU enlargement that have taken place since 1995 (including the specific countries involved), then asked whether they felt each of these had generally been a good or a bad thing for the EU.

As Figure 4.1 below shows, **the results were mixed and very much dependent on the specific countries in question:**

- A large majority (76%) felt the accession of Austria, Finland and Sweden had been a good thing, while 14% felt it had been both good and bad, and only 6% felt it had been mainly or entirely bad.
- A somewhat lower proportion, though still a majority (53% and 52% respectively), were positive about the accession of Croatia and the various countries that joined the EU during the 2004 enlargement round – Czechia, Cyprus, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia and Slovenia. At the same time, around a quarter of respondents expressed more mixed views on these enlargement rounds and roughly half as many expressed mainly or entirely negative views.
- Opinion was more divided still on the accession of Bulgaria and Romania: Just over a third of respondents (38%) felt this has been good for the EU, while just over a quarter (28%) felt it had been both good and bad, and a similar proportion (26%) felt it had been mainly or entirely bad.

Figure 4.1: Views on past EU enlargement rounds



Base: N=25844 (All respondents)

Question: Do you feel that these groups of countries joining the European Union (EU) was generally a good or a bad thing for the EU?

Looking at the country level results (Table 4.1):

- **Majorities in all Member States believed that the accession of Austria, Finland and Sweden was a good thing for the EU.** This sentiment was particularly strong in Estonia and Lithuania, reaching 86% in both cases. In contrast, it was somewhat weaker than average in Czechia (66%), France (70%), Bulgaria (71%), Italy (71%) and Austria (72%).
- **As regards the accession of Croatia, the proportion of respondents feeling that this had been a good thing for the EU fell below the 50% mark in ten Member States, most of which were in the North and West** – France (41%), the Netherlands (42%), Denmark (43%), Belgium (44%), Germany (46%), Czechia (47%), Luxembourg (47%), Finland (48%) and Sweden (48%). Conversely, notably higher than average positivity towards Croatia's accession was found in Lithuania (74%), Romania (74%), Hungary (71%), Estonia (68%), Poland (67%), Bulgaria (64%), Croatia itself (63%), Ireland (62%), Slovakia (62%), Malta (61%), Portugal (61%), Spain (61%) and Cyprus (60%).
- **As regards the 2004 enlargement round**, the proportion of respondents who felt this was a good thing fell below 50% in the Netherlands (36%), France (39%), Belgium (40%), Austria (43%), Denmark (45%), Luxembourg (45%), Sweden (45%), Germany (47%) and Italy (45%). The figure was notably *higher* than average in the nine States that were part of the enlargement round, as well as in Romania (75%), Croatia (67%), Bulgaria (65%), Greece (62%), Portugal (60%) and Spain (59%).
- **While at the EU level only 38% of respondents felt the accession of Bulgaria and Romania was a good thing, the figure exceeded 50% in five Member States** – Bulgaria and Romania themselves (59% and 73% respectively) along with three of the 2004 accession States: Lithuania (59%), Estonia (56%) and Poland (55%).

Table 4.1: Views on past EU enlargement rounds, by country - % who think these countries joining was an entirely good/mainly good thing

	EU27	AT	BE	BG	HR	CY	CZ	DK	EE	FI	FR	DE	EL	HU	IE	IT	LV	LT	LU	MT	NL	PL	PT	RO	SK	SI	ES	SE
Austria, Finland & Sweden	76*	72	74	71	82	79	66	83	86	73	70	81	74	81	77	71	80	86	83	82	82	77	80	75	75	76	76	76
Croatia	53	53	44	64	63	60	47	43	68	48	41	46	54	71	62	55	52	74	47	61	42	67	61	74	62	50	61	48
Czechia, Cyprus, Estonia, Hungary, Latvia, Lithuania, Malta, Slovakia, Poland & Slovenia	52	43	40	65	67	66	52	45	77	51	39	47	62	65	57	45	60	81	45	70	36	72	60	75	67	64	59	45
Bulgaria & Romania	38	24	31	59	36	44	32	31	56	28	28	29	47	43	47	37	35	59	29	42	22	55	49	73	44	32	49	27

Base: N=25844 (All respondents)

Question: Do you feel that these groups of countries joining the European Union (EU) was generally a good or a bad thing for the EU?

At the subgroup level, particularly strong positivity toward past accession rounds was found among people residing in large towns or cities, those with a high level of education and a good understanding of the EU, and those who found it easy to manage on their income. Additionally, respondents with left-leaning political values tended to hold more positive views of past enlargement rounds than those with right-leaning values, regardless of the groups of countries in question (Table 4.2).

As regards the influence of age on perceptions, an interesting dichotomy was found:

- Older respondents (aged 55 and over), many of whom will have witnessed the initial phases of European integration, were more likely than younger groups to feel that the accession of Austria, Finland, and Sweden was a good thing;
- Younger working-age respondents (25-44), who grew up with a more integrated EU, were more likely than any other age group to view the subsequent three enlargement rounds as a good thing.

Table 4.2: Views on past EU enlargement rounds, by key subgroups – % who think these countries joining was an entirely good/mainly good thing

	Austria, Finland & Sweden	Croatia	Czechia, Cyprus, Estonia, Hungary, Latvia, Lithuania, Malta, Slovakia, Poland & Slovenia	Bulgaria & Romania
Age				
18-24	72%	52%	53%	38%
25-34	72%	59%	61%	46%
35-44	75%	57%	55%	43%
45-54	74%	51%	48%	35%
55-64	77%	49%	47%	34%
65+	80%	52%	50%	36%
Education				
Low	60%	40%	39%	28%
Mid	74%	51%	49%	36%
High	80%	58%	57%	42%
Political values		Political values		
Right/Centre-right	70%	43%	45%	29%
Centre	72%	49%	46%	33%
Centre-left/Left	81%	62%	58%	46%
No clear orientation	75%	53%	54%	41%
Urbanity/rurality		Urbanity/rurality		
Rural area/village	72%	50%	47%	35%
Small or medium-sized town	75%	50%	49%	35%
Large town or city	79%	59%	57%	45%
Understanding of the EU				
A great deal/a fair amount	81%	61%	59%	45%
Not very much/nothing at all	68%	41%	39%	28%
Ease of managing financially				

	Austria, Finland & Sweden	Croatia	Czechia, Cyprus, Estonia, Hungary, Latvia, Lithuania, Malta, Slovakia, Poland & Slovenia	Bulgaria & Romania
Very/fairly difficult	80%	57%	55%	41%
Very/fairly easy	71%	49%	48%	36%

4.1.1 Reasons past enlargement rounds were seen as a good thing

Table 4.3 below shows the reasons past EU enlargement rounds were viewed positively by respondents who held this perspective. **For all but one of the rounds – Austria-Finland-Sweden – the top-ranking reason was that enlargement had made it easier to move and travel to/from the new member countries.** In the case of the Austria-Finland-Sweden round, easier movement/travel ranked second, behind the creation of business opportunities, economic growth, and modernisation in other EU countries. For the other rounds, the second-ranking reason was that the enlargements created business opportunities, economic growth, and modernisation in the *new member countries*.

The third (and subsequent) most commonly cited reasons for viewing past enlargements positively showed greater variation depending on the round: For the 2004 and Croatia rounds, the third-ranking reason was the creation of business opportunities, economic growth, and modernisation in other EU countries (tied with bringing security and political stability in the case of the Croatia round). For the Romania-Bulgaria round, the third-ranking reason was the promotion of democracy and strengthening human rights protection in the EU, while for the Austria-Finland-Sweden round, it was increasing the EU's influence in the world.

Table 4.3: Reasons past enlargement rounds were seen as a good thing (%)

	All rounds	Austria, Finland & Sweden	Czechia, Cyprus, Estonia, Hungary, Latvia, Lithuania, Malta, Slovakia, Poland & Slovenia	Bulgaria & Romania	Croatia
Made it easier for people to move and travel to/from these countries	42	39	45	40	44
Business opportunities, economic growth and modernisation in these countries	38	34	44	38	36
Business opportunities, economic growth and modernisation in other EU countries	37	42	40	35	30
Strengthened the EU's influence in the world	33	37	39	32	24
Promoted democracy and strengthened protection of human rights in EU	31	26	36	37	26
Brought more security and political stability to these countries	30	22	34	36	30
Brought higher consumer, social and/or environmental standards to these countries	25	22	27	29	24
Improved safety/security in the EU	22	24	25	20	19
Helped to reduce crime and illegal immigration in the EU	11	7	11	15	12
Something else	3	4	2	2	3
None of the above	1	2	1	1	2
Don't know	4	4	3	4	6
Prefer not to say	1	1	1	1	1

There were few consistent geographic patterns in reasons for viewing past enlargement rounds positively. However, it was notable that:

- In several East European countries, easier movement and travel was the top response for the Austria-Finland-Sweden round. This was particularly notable in Bulgaria (50%), Croatia (55%), Czechia (50%), Poland (52%), Romania (52%), Slovakia (60%), and Slovenia (54%).

- In the Baltic countries – Estonia (57%), Latvia (53%), and Lithuania (54%) – as well as in France (38%) and Luxembourg (46%), the top reason for viewing the Austria-Finland-Sweden round positively was that it strengthened the EU's influence in the world.
- In Denmark, more security and political stability in the EU was the top reason for viewing two of the rounds positively: the Eastern bloc round (48%) and the Romania-Bulgaria round (46%) – and was also among the top reasons for the Croatia round.

At the sub-group level, respondents aged 65 and over were consistently more likely than other age groups to mention ease of movement/travel as a reason for viewing past enlargement rounds positively. For example, 43% of people aged 65 and over mentioned this in relation to the Austria-Finland-Sweden round, vs. 34% of those aged 18-24. Ease of travel also received higher than average mention among the most educated groups of respondents (e.g. 44% vs. 35% in the case of Croatia's accession).

Respondents living in large towns or cities were consistently more likely than others to cite business opportunities in the new member countries as a reason for viewing past enlargement rounds positively (e.g. 38% vs. 30% of those in rural areas for the Austria-Finland-Sweden round). Business opportunities in the new member countries *and/or in other EU countries* also generally received higher than average mention among respondents with right/centre-right political values (e.g. 47% of this group mentioned this reason in relation to the Bulgaria and Romania round, compared to 37% of those with centre-left/left values).

4.1.2 Reasons past enlargement rounds were seen as a bad thing

Reasons for viewing past EU enlargement rounds negatively varied to a degree depending on the round. That said, **uncontrolled immigration and poor border control emerged among the top two responses for all rounds – and was the top response for the Austria-Finland-Sweden round**. Concerns about economic imbalances similarly ranked highly for all rounds, and was the top response for the 2004 round (tied with the view that the accession had made the EU more complex and difficult to manage). The top response in the case of the Bulgaria-Romania and Croatia rounds, meanwhile, was that these countries required a lot of EU financial support to modernise.

Table 4.4: Reasons past enlargement rounds were seen as a bad thing (%)

	All rounds	Austria, Finland & Sweden	Czechia, Cyprus, Estonia, Hungary, Latvia, Lithuania, Malta, Slovakia, Poland & Slovenia	Bulgaria & Romania	Croatia
Contributed to more uncontrolled immigration and poor border control	38	27	38	47	33
This/these country/ies required a lot of EU financial support to modernize	37	17	38	48	35
Caused economic imbalances within the EU	33	23	39	35	29
Made the EU more complex and difficult to manage	28	28	39	24	26
Increased feelings of insecurity/political instability in the EU	26	18	29	29	23
Lowered social standards or welfare systems in the EU	24	17	28	28	22
Meant less EU money/funding was available to support the country	21	23	25	18	22
Increased cultural and language differences within the EU	18	16	21	18	18
Led to job losses in the country	17	18	20	15	15
Resulted in my country having less influence in EU decisions	11	19	13	8	12
Reduced the EU's influence in the world	8	12	8	6	9
Something else	4	5	4	4	4
None of the above	2	5	1	1	2
Don't know	2	3	3	1	3
Prefer not to say	1	2	1	1	1

Some regional patterns were apparent in the top reasons for viewing past enlargement rounds negatively. In particular, respondents from West and North European countries, including Austria, Denmark, Finland, Germany, the Netherlands and Sweden, were more likely than average to mention that accession countries needed a lot of EU financial support to modernise. They particularly felt this way about the 2004 accession countries and Croatia. Respondents from some West European countries (Austria, France), together with those from some South European ones (Portugal, Greece, Croatia) as well as Finland, were also among those most likely to believe that the Austria-Finland-Sweden and the Bulgaria-Romania rounds caused economic imbalances within the EU.

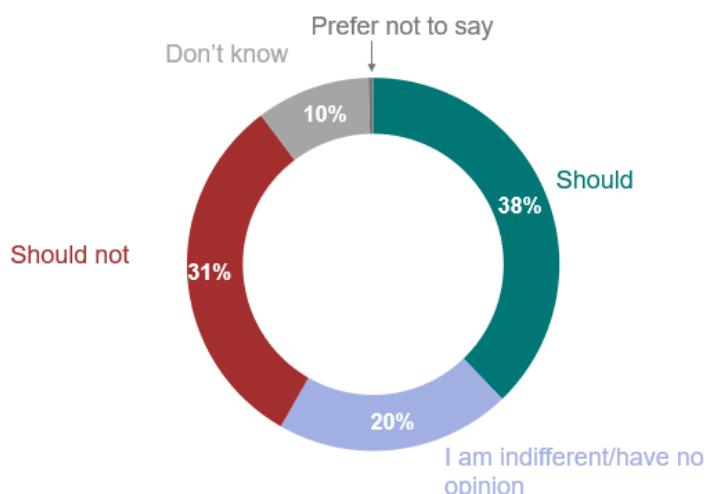
Beyond these geographical patterns, respondents aged 55 and over were generally more likely than younger age groups to select all three of the top-ranking reasons for viewing past enlargement rounds negatively – uncontrolled migration/poor border control, the accession countries' need for a lot of EU financial support, and economic imbalances within the EU (e.g. 55% of respondents aged 55-64 selected uncontrolled migration as a reason for viewing the Bulgaria-Romania round negatively, vs. 35% of those aged 18-34). The only exception to this pattern was in the case of the Austria-Finland-Sweden round, for which working-age respondents (aged 35-44) were as likely as the older groups to mention economic imbalances within the EU (28% of them, vs. 27% of those aged 55-64 and 26% of those aged 65 and over).

The issue of migration and border control also tended to receive higher than average mention among respondents with right/centre-right political values (e.g. 39% of them mentioned this in relation to the Austria-Finland-Sweden round vs. 24% of those with left/centre-left political values). In relation to the Bulgaria-Romania round specifically, those with right/centre-right political values were also more likely than average to mention that these countries needed a lot of EU financial support to modernise (51% vs. 45% among those with left/centre-left values).

4.2 Opinion on further EU enlargement

Opinion on the question of further EU enlargement was mixed: Whereas 38% felt the EU should be looking to add more member countries, 31% felt it should not and a further 20% were indifferent on the matter. Ten percent did not feel able to give an opinion (Figure 4.2).

Figure 4.2: Opinion on further EU enlargement



Base: N=25844 (All respondents)

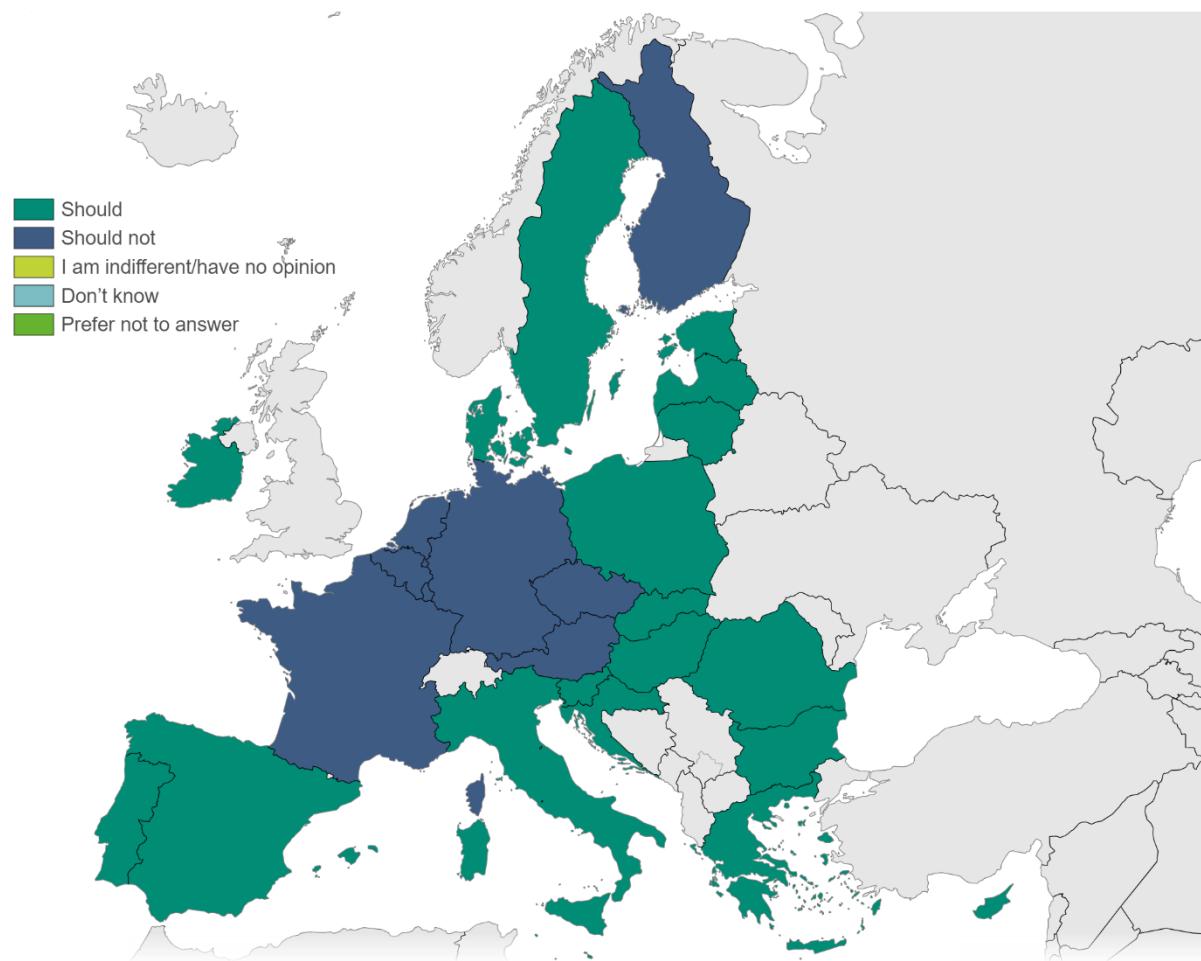
Question: In general, do you think that the European Union (EU) should or should not be looking to add more member countries at this moment?

This mixed picture was replicated in most Member States (Figure 4.3). That said, the proportion in favour of the EU adding more member countries reached a majority in four Member States: Lithuania (57%), Romania (54%), Bulgaria and Poland (50% in both cases). The figure was also notably higher than average in a few South European and Baltic countries: Estonia (48%), Portugal (48%), Latvia (47%), Cyprus (46%), Greece (45%), Malta (43%), and Spain (42%) – as well as in Hungary (46%). In contrast, approaching half of respondents in three West European countries – Luxembourg (48%), France (47%), and Austria (46%) – felt the EU should *not* be looking to add more member countries at this moment (Figure 4.4).

Figure 4.3: Opinion on further EU enlargement – most selected response by country

Q18 In general, do you think that the European Union (EU) should or should not be looking to add more member countries at this moment?

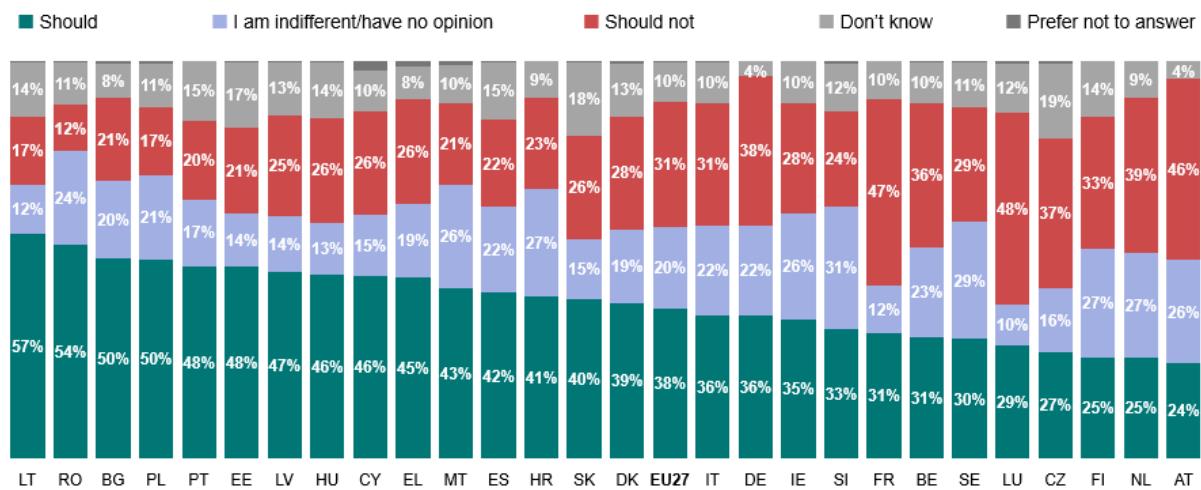
Most selected response shown



Base: N=25844 (All respondents)

Administrative boundaries: © EuroGeographics © UN-FAO © Turkstat
Cartography: Eurostat – IMAGE, 08/2024

Figure 4.4: Opinion on further EU enlargement, by country



Base: N=25844 (All respondents)

Question: In general, do you think that the European Union (EU) should or should not be looking to add more member countries at this moment?

While mixed views were widely evident at the sub-level too, openness to further enlargement was generally higher than average among:

- respondents from large towns or cities (43% vs. 35% of those living in rural areas);
- those with a high level of education (41% vs. 29% of those with a low level);
- those in favour of the EU (48% vs. 6% of those opposed);
- those believing their country had benefitted from being an EU member (49% vs. 18% of those who believed it had not benefitted);
- those with centre-left/left political values (47% vs. 28% of those with centre-right/right values).

While there was no clear pattern of responding by age, it was notable that younger respondents aged 18-34 were significantly more likely than other age groups to say they were *indifferent* about the issue of future enlargement (31% of 18-24 year olds and 28% of 25-34 year olds, vs. for instance 16% of those aged 65 and over).

4.3 Views on specific countries joining the EU

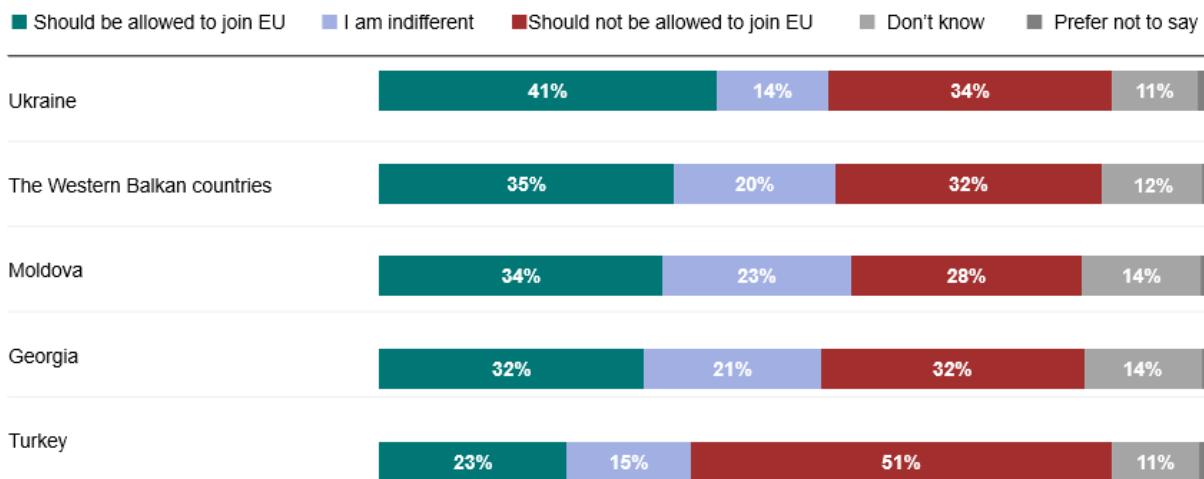
4.3.1 Current candidate countries

Respondents were asked for their views on the potential accession to the EU of current candidate countries – the Western Balkan countries (i.e. Albania, Bosnia and Herzegovina, Montenegro, Kosovo, North Macedonia and Serbia), Moldova, Georgia and Turkey.

For the most part, opinion on the accession of these countries was mixed, aligning with the results reported above on respondents' general openness to further enlargement (See section 4.2). In the case of the Western Balkan countries, Moldova and Georgia, for example, approximately one third of respondents were in favour of accession, while another third were against, and around 20% were indifferent. Similarly, for Ukraine, 41% were in favour of accession while 34% were against and 14% were indifferent.

Views were somewhat less mixed in the case of Turkey, with just over half of respondents (51%) believing that this country should *not* be allowed to join the EU, compared to 23% who believed it should and 15% who were indifferent (Figure 4.5).

Figure 4.5: Views on specific (candidate) countries joining the EU



Base: N=25844 (All respondents)

Question: In your opinion, should these countries be allowed to join the EU, when they are ready?

As shown in Table 4.5 below, the proportion of respondents supporting candidate countries joining the EU varied considerably by country:

- **Support for Ukraine's accession reached a majority in seven, mostly North European, countries:** Denmark (54%), Estonia (65%), Finland (55%), Latvia (58%), Lithuania (68%), Portugal (60%) and Sweden (56%). Conversely, opposition to Ukraine's potential accession was highest in Austria (53%), and also above average in Czechia (50%), Hungary (48%), Slovakia (44%), Bulgaria (44%), Greece (44%), Cyprus (42%), France (42%), Luxembourg (42%) and Germany (40%).
- **Moldova's accession was supported by a majority in Romania (66%) – the only EU Member State bordering Moldova – and in the Baltic countries** of Estonia (51%), Latvia (50%), and Lithuania (55%). Opposition was higher than average in several West European countries: France (42%), Austria (41%), Germany (34%), Luxembourg (34%) and Belgium (31%).
- **The Western Balkans' accession was supported by a majority only in Romania (56%),** though the figure also neared a half in Bulgaria (49%), Poland (47%), Portugal (46%) and Slovenia (45%). Again, opposition was higher than average in several West European countries – France (47%), Austria (43%), Germany (42%), Luxembourg (38%), Belgium (37%) and the Netherlands (35%) – as well as in Greece (39%).
- **Turkey's accession too was supported by a majority only in Romania (55%).** In all other Member States the figure ranged between 10% and 38%. **Opposition to Turkey's accession reached 50% or more in several West and North European countries**, including two neighbouring countries – Cyprus (82%) and Greece (71%) – as well as Austria (73%),

Luxembourg (70%), France (70%), Sweden (66%), Germany (64%), Finland (62%), Belgium (58%), Denmark (58%) and the Netherlands (57%).

- **Georgia's accession lacked majority support in any country**, though the figure neared the 50% mark in the Baltic countries – Lithuania (47%), Latvia (46%) and Estonia (44%) – as well as in Poland (47%), Portugal (46%) and Romania (48%). In contrast, opposition was higher than average in several West European countries – Austria (45%), France (44%), Germany (39%), Luxembourg (39%) and the Netherlands (37%).

Table 4.5: Views on specific (candidate) countries joining the EU, by country (% who think the countries should be allowed to join the EU)

	EU27	AT	BE	BG	HR	CY	CZ	DK	EE	FI	FR	DE	EL	HU	IE	IT	LV	LT	LU	MT	NL	PL	PT	RO	SK	SI	ES	SE
Ukraine	41	26	38	34	41	30	29	54	65	55	35	36	35	29	48	39	58	68	32	42	41	48	60	42	36	35	48	56
The Western Balkan countries	35	30	28	49	42	33	32	36	42	27	25	28	36	42	34	38	39	42	30	34	29	47	46	56	42	45	42	33
Moldova	34	27	27	45	34	36	30	34	51	24	24	29	38	37	36	32	50	55	29	33	26	46	48	66	38	31	38	31
Georgia	32	22	26	39	30	35	24	31	44	24	25	28	34	31	34	31	46	47	28	35	23	47	46	48	33	29	37	28
Turkey	23	11	18	38	32	10	22	21	29	13	11	14	16	37	29	22	32	37	12	24	16	35	36	55	31	33	33	12

Base: N=25844 (All respondents)

Question: In your opinion, should these countries be allowed to join the EU, when they are ready?

Opinion at the socio-demographic level for the most part reflected the mixed picture presented in Figure 4.5. Generally though, support for the various candidate countries joining the EU was highest among males, people residing in large cities, and those with a high level of education (Table 4.6). Additionally, respondents with left-leaning political values tended to be more supportive of candidate countries joining than those with right-leaning values. This difference was especially marked in relation to Ukraine (Half of those with left-leaning values supported this country's accession vs. 28% of those with right leaning values).

There was also some variation by age: Older respondents aged 65 and over were more likely than any other age group to believe that Ukraine, Moldova and Georgia *should* be allowed to join the EU. At the same time, though, they were *less* likely to believe that the Western Balkans and Turkey should be allowed to join.

Table 4.6: Views on specific (candidate) countries joining the EU, by key socio-demographics (% who think the countries should be allowed to join the EU)

	Western Balkans	Ukraine	Moldova	Georgia	Turkey
Age					
18-24	36%	37%	29%	31%	23%
25-34	37%	37%	34%	32%	26%
35-44	35%	37%	33%	31%	25%
45-54	34%	38%	33%	30%	21%
55-64	34%	40%	33%	31%	21%
65+	37%	48%	38%	35%	21%
Gender					
Males	39%	43%	38%	34%	23%
Females	32%	39%	31%	30%	22%
Education					
Low	28%	34%	27%	25%	21%
Mid	34%	39%	32%	30%	22%
High	39%	43%	37%	35%	24%
Political values					
Right/Centre-right	28%	28%	28%	25%	19%
Centre	29%	36%	30%	27%	20%
Centre-left/Left	44%	50%	41%	40%	26%
No clear orientation	34%	40%	33%	30%	22%
Urbanity/rurality					
Rural area/village	33%	39%	31%	29%	20%
Small or medium-sized town	34%	39%	32%	30%	22%
Large town or city	39%	43%	38%	36%	25%

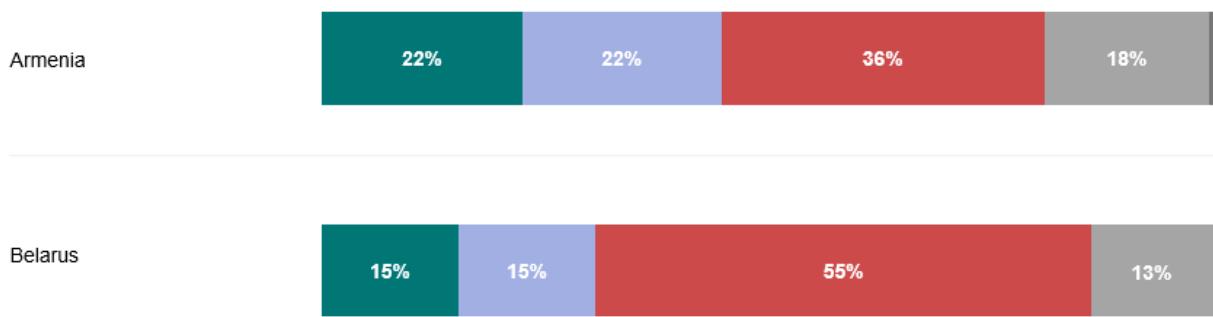
4.3.2 Armenia and Belarus

Respondents were also asked for their views on two other (currently non-candidate) countries joining the EU: Armenia and Belarus. **For both of these countries, more respondents opposed than**

supported accession. Opposition was particularly pronounced in the case of Belarus, with over half (55%) of respondents believing the country should *not* be allowed to join the EU, compared to the 15% who felt it should. For Armenia, opposition stood at over a third (36%), while support stood at 22%. Notably, a significant portion of respondents were indifferent on the issue of these countries joining (15% in the case of Belarus and 22% in the case of Armenia), or felt unable to express an opinion either way (13% and 18% respectively).

Figure 4.6: Opinion on Armenia and Belarus joining the EU

■ Should be allowed to join the EU ■ I am indifferent ■ Should not be allowed to join the EU ■ Don't know ■ Prefer not to say



Base: N=25844 (All respondents)

Question: *In your opinion, should these countries be allowed to join the EU, when they are ready?*

While views on Armenia and Belarus joining the EU varied to an extent by country, support did not reach a majority in any country.

Support for Armenia's accession peaked at 40% in Greece. In contrast, higher than average proportions of respondents in nine, predominantly West European, countries believed that Armenia should *not* join the EU: Austria (54%), Germany (49%), Luxembourg (47%), Finland (44%), the Netherlands (44%), Denmark (42%), France (43%), Belgium (41%) and Czechia (39%).

Support for Belarus' accession was at its highest in Bulgaria (32%) and Cyprus (28%). At the same time, majorities in 14 countries spread across the four EU regions believed that Belarus should *not* join the EU: Finland (75%), Luxembourg (70%), Belgium (67%), Estonia (67%), Lithuania (67%), the Netherlands (68%), Denmark (66%), Austria (65%), France (64%), Czechia (63%), Germany (63%), Sweden (61%), Poland (60%) and Latvia (59%).

The proportion of respondents supporting Armenia or Belarus joining the EU was consistently below the 50% mark at the sub-group level too. As shown in Table 4.7, the groups who were the least supportive were:

- those living in rural areas and small towns;
- those with a low level of education;
- those with centre-right/right political values.

Table 4.7: Opinion on Armenia and Belarus joining the EU, by key socio-demographics (% who think the countries should be allowed to join the EU)

	Armenia	Belarus
Age		
18-24	21%	15%
25-34	23%	18%
35-44	23%	17%
45-54	20%	14%
55-64	21%	13%
65+	24%	14%
Education		
Low	16%	12%
Mid	20%	13%
High	26%	17%
Political values		
Right/Centre-right	16%	11%
Centre	18%	12%
Centre-left/Left	28%	20%
No clear orientation	22%	15%
Urbanity/rurality		
Rural area/village	21%	13%
Small or medium-sized town	20%	14%
Large town or city	25%	18%

4.4 Anticipated impacts of specific countries joining the EU

Respondents were asked for their views on potential impacts of different candidate countries joining the EU and, specifically, whether they felt these accessions would have a positive or negative impact on: the EU's economy, their country's economy, the EU's security, their country's security, their country's political power in the EU, and the general functioning of the EU.

For each candidate country and each of the aforementioned impacts, views were once again quite mixed. Indeed, typically between around a quarter and a third of respondents anticipated "neither a positive nor a negative impact". **This notwithstanding, the proportion of respondents anticipating negative impacts generally exceeded the proportion anticipating positive ones.** This was especially the case in relation to Ukraine and, to a lesser extent, Turkey, reflecting the results reported in section 4.3.1 above. Indeed, almost half of respondents anticipated that these countries joining the EU could undermine the bloc's security (49% and 44% respectively) – and also their own country's security in the case of Ukraine (42%).

Security impacts were among respondents' top-ranking concerns for *all* of the other candidate countries too (albeit to varying levels), along with potential impacts on the EU's economy and on the general functioning of the bloc.

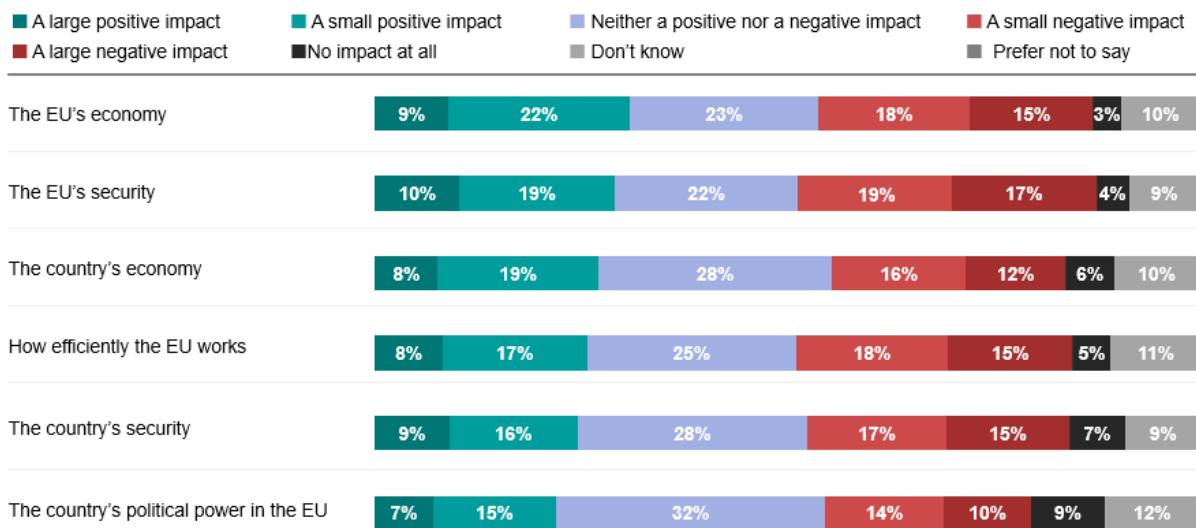
Sections 4.4.1 to 4.4.5 below explore these findings in more detail for each of the candidate countries in turn, including at the Member State and subgroup level.

4.4.1 Western Balkan countries

Views on potential impacts of the Western Balkan countries joining the EU were highly divided but, overall, sentiment leaned slightly more towards the negative than the positive (Figure 4.7). This was particularly the case in relation to the potential impact on the EU's security (36% anticipated the impact would be negative vs. 29% who anticipated it would be positive), and on the efficiency of the EU (33% vs. 26%).

The gap between negative and positive views was narrower in relation to the potential impact of the Balkans' accession on the EU's economy (33% vs. 31%), member countries' economies (28% vs. 27%) and member countries' political power within the EU (25% vs. 22%). On the latter dimension, about a third of respondents (32%) anticipated neither a positive nor a negative impact, a higher proportion than expressed a negative or positive view.

Figure 4.7: Anticipated impacts of the Western Balkan countries joining the EU



Base: N=10335

Question: In your opinion, what impact would the Western Balkan countries joining the EU have on...?

Anticipated impacts of the Western Balkans joining the EU varied greatly by country. On the one hand, opinion was consistently more positive than negative in several East European countries – Bulgaria, Poland and Romania – as well as in Portugal. In contrast, a majority, or nearly half of respondents in several other countries, predominantly in the North and West of Europe, anticipated the Western Balkans' accession would impact negatively on:

- the EU's economy – Sweden (57%), Finland (56%), Denmark (48%) and Czechia (47%);
- the EU's security – Austria (52%), Luxembourg (50%), Czechia (48%), Slovenia (47%) and France (46%);
- the security of the respondents' own countries – Austria (50%);
- how efficiently the EU works – the Netherlands (50%) and France (45%).

At the sub-group level, anticipation of positive impacts tended to decrease a little with age. For example, just over a third of young people aged 18-24 (35%) and 25-34 (36%) felt the Balkans' accession would have a positive impact on the EU's economy, compared to 29% of those aged 65 and over (Table 4.8).

Views were also consistently more positive than average (though still short of a majority) among respondents living in large town and cities, those with a high level of education, those who found it easy to manage on their income and those with left-leaning political values.

Table 4.8: Anticipated impacts of the Western Balkan countries joining the EU – by key socio-demographics (% who anticipated a large/small positive impact)

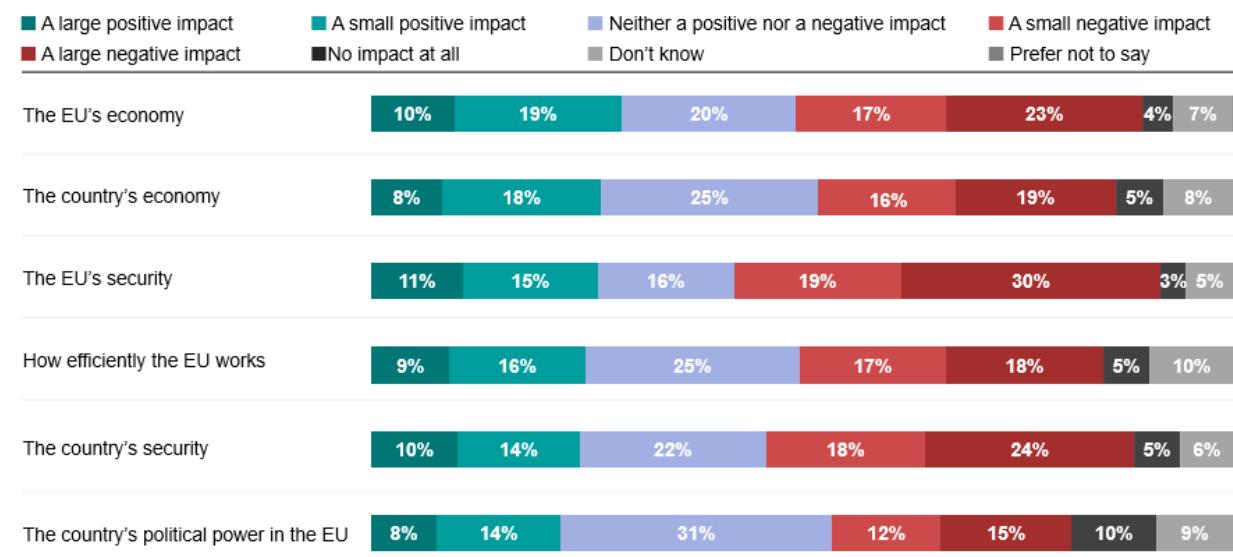
	The EU's economy	The EU's security	The country's economy
Age			
18-24	35%	28%	26%
25-34	36%	33%	35%
35-44	29%	27%	25%
45-54	29%	26%	24%
55-64	30%	29%	28%
65+	29%	30%	26%
Education			
Low	27%	25%	26%
Mid	29%	27%	24%
High	33%	31%	30%
Political values			
Right/Centre-right	24%	22%	22%
Centre	25%	25%	23%
Centre-left/Left	39%	36%	33%
No clear orientation	30%	26%	25%
Urbanity/rurality			
Rural area/village	27%	24%	24%
Small or medium-sized town	29%	27%	26%
Large town or city	35%	34%	30%
Ease of managing financially			
Very/fairly difficult	27%	25%	23%
Very/fairly easy	34%	33%	31%

4.4.2 Ukraine

Views on potential impacts of Ukraine joining the EU were consistently more negative than in the case of the Western Balkan countries (Figure 4.8). This was particularly notable in relation to the potential impact on the EU's security, with almost half (49%) of respondents anticipating a negative impact (vs. 26% anticipating a positive impact). Views were similarly more negative than positive in relation to the potential impact of Ukraine's accession on other member countries' security (42% vs. 24%), the EU's economy (40%, vs. 29%), member countries' economies (34% vs. 26%) and the efficient working of the EU (35% vs. 25%).

As regards how Ukraine's accession might affect the political power of respondents' countries within the EU, around a third (31%) anticipated neither a positive nor a negative impact, somewhat more than anticipated either a negative or a positive one (27% and 22% respectively).

Figure 4.8: Anticipated impacts of Ukraine joining the EU



Base: N=10365

Question: *In your opinion, what impact would Ukraine joining the EU have on...?*

At the Member State level, a majority or near majority of respondents in countries across the four EU regions anticipated that Ukraine's accession would negatively impact:

- the EU's economy – Czechia (61%), Finland (52%), Austria (50%), Hungary (49%), France (48%) and Denmark (48%);
- the EU's security – Czechia (72%), Austria (62%), Luxembourg (61%), Malta (61%), Slovenia (61%), Croatia (56%), Hungary (55%), the Netherlands (55%) and Germany (54%);
- the economy of respondents' countries – Czechia (55%) and Hungary (47%);
- the security of respondents' countries – Czechia (67%), Austria (56%) and Germany (51%);
- the political power of respondents' countries – Hungary (47%);
- how efficiently the EU works – Czechia (52%), Hungary (49%), Slovenia (47%), Austria (46%), and Greece (46%).

In contrast, views were consistently more *positive* than negative (though still short of a majority) in the Baltic countries (Estonia, Lithuania and Latvia), as well as in Poland.

As Table 4.9 illustrates, views at the subgroup level were consistently more negative than average among respondents with right-leaning political values and those who found it difficult to manage on their income (Table 4.9).

Table 4.9: Anticipated impacts of Ukraine joining the EU – by key socio-demographics (%) who anticipated a large/small negative impact)

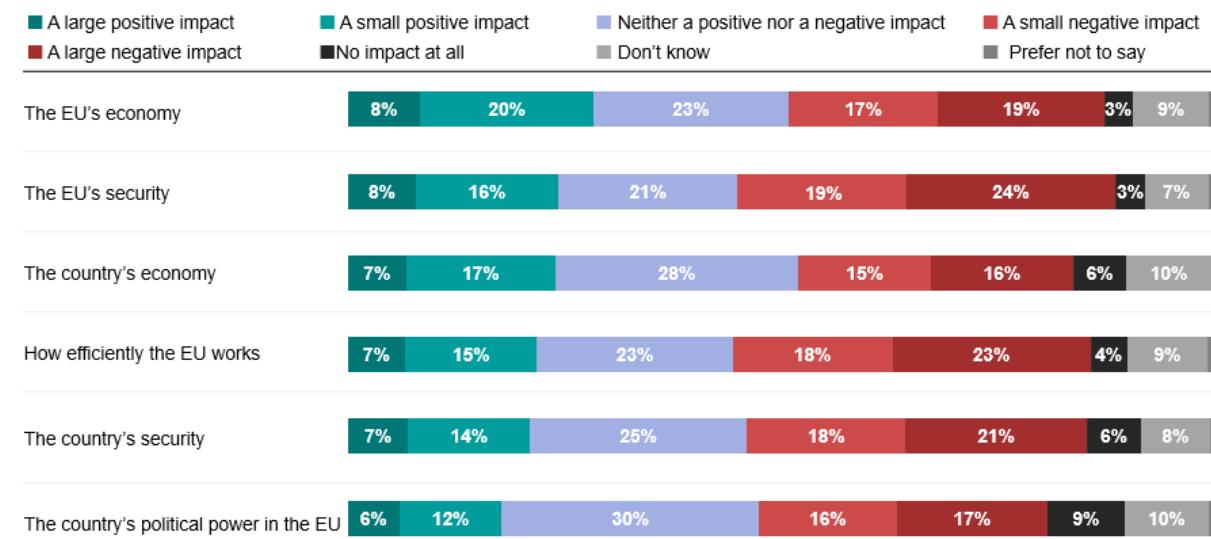
	The EU's economy	The EU's security	The country's economy
Age			
18-24	42%	54%	33%
25-34	37%	50%	32%
35-44	39%	48%	35%
45-54	44%	54%	36%
55-64	43%	52%	38%
65+	37%	43%	32%

	The EU's economy	The EU's security	The country's economy
Gender			
Males	38%	47%	32%
Females	42%	51%	37%
Education			
Low	40%	45%	37%
Mid	40%	51%	36%
High	39%	48%	32%
Political values			
Right/Centre-right	57%	65%	52%
Centre	39%	48%	34%
Centre-left/Left	32%	41%	26%
No clear orientation	39%	50%	33%
Urbanity/rurality			
Rural area/village	42%	51%	37%
Small or medium-sized town	42%	51%	36%
Large town or city	36%	47%	31%
Ease of managing financially			
Very/fairly difficult	44%	53%	40%
Very/fairly easy	37%	45%	29%

4.4.3 Turkey

Views on potential impacts of Turkey joining the EU were more negative than in the case of the Western Balkans, but slightly less so than in the case of Ukraine (Figure 4.9). Forty-four percent of respondents anticipated Turkey's accession would have a negative impact on the EU's security (vs. 24% who anticipated a positive impact), and similar proportions anticipated a negative impact on the efficient working of the EU (41%, vs. 22% positive) as well as on their own country's security (39%, vs. 21% positive). Meanwhile, around a third anticipated negative impacts on the EU's economy (36% vs. 28% who anticipated a positive impact), their own country's economy (32%, vs. 24%) and the political power of their country within the EU (33% vs. 18%).

Figure 4.9: Anticipated impacts of Turkey joining the EU



Base: N=10365

Question: In your opinion, what impact would Turkey joining the EU have on...?

The proportion of respondents anticipating that Turkey's accession would impact negatively on the EU's security reached a majority in Cyprus (76%), Austria (65%), Finland (64%), France (59%), Luxembourg (59%), Sweden (58%), Belgium (52%) and the Netherlands (52%). In several of these countries, attitudes were also more negative than average when it came to the impact of Turkey's accession on the EU's economy, the political power of respondents' own nations within the EU and how efficiently the EU worked. For instance, over three-quarters in Cyprus anticipated negative consequences for how efficiently the EU worked (76%) and for Cyprus' own political influence within the Union (78%).

In contrast, respondents in some East European countries tended to be more positive than negative about the potential effects of Turkey joining the EU. For example, pluralities in Romania (50%), Bulgaria (46%) and Poland (43%) felt Turkey's accession would have a positive impact on the EU's security.

At the subgroup level, views on potential impacts of Turkey's accession were somewhat more negative than average among older age cohorts, residents of rural areas, those with right-leaning political values and those who found it difficult to manage on their income (Table 4.10).

Table 4.10: Anticipated impacts of Turkey joining the EU – by key socio-demographics (%) who anticipated a large/small negative impact)

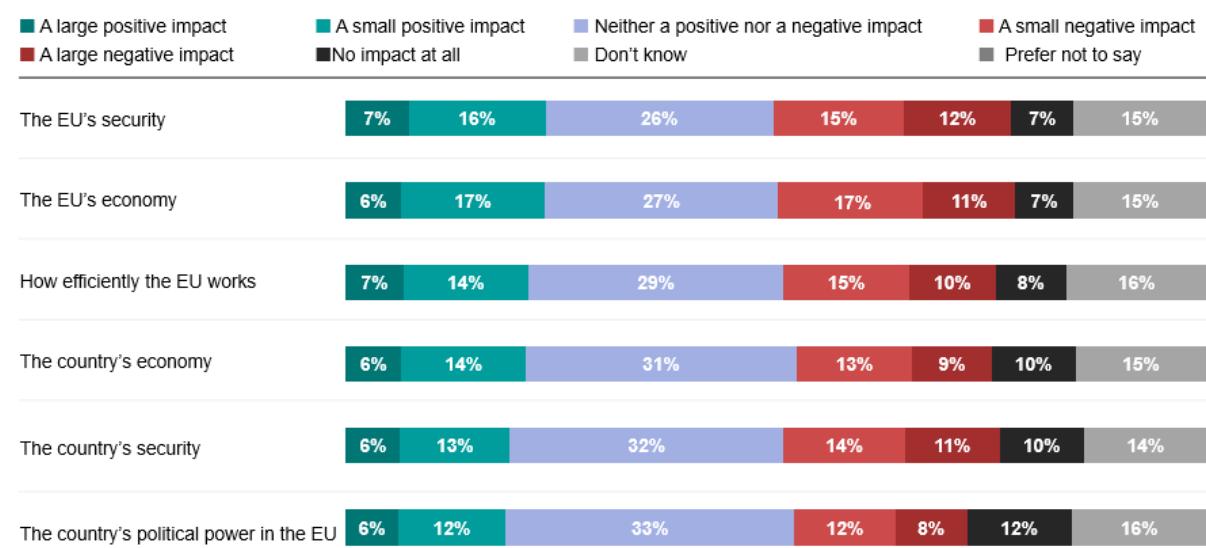
	The EU's economy	The EU's security	The country's economy
Age			
18-24	27%	33%	24%
25-34	30%	40%	27%
35-44	33%	40%	28%
45-54	39%	47%	37%
55-64	42%	49%	36%
65+	40%	46%	33%
Education			
Low	40%	46%	37%
Mid	36%	43%	33%

	The EU's economy	The EU's security	The country's economy
High	36%	43%	30%
Political values			
Right/Centre-right	45%	53%	42%
Centre	36%	43%	30%
Centre-left/Left	33%	39%	28%
No clear orientation	36%	45%	32%
Urbanity/rurality			
Rural area/village	39%	47%	36%
Small or medium-sized town	38%	45%	34%
Large town or city	32%	40%	27%
Ease of managing financially			
Very/fairly difficult	38%	46%	35%
Very/fairly easy	36%	42%	29%

4.4.4 Moldova

As in the case of the Western Balkans, views on potential impacts of Moldova joining the EU were consistently very mixed indeed. Thus, the proportion anticipating positive impacts ranged from 18% to 23%, while the proportion anticipating negative ones ranged from 20% to 27% and neutral responding ranged between 26% and 33%. In relative terms, the highest levels of negative responding were in relation to the potential impact of Moldova's accession on the EU's security and its economy. For both dimensions, almost three in ten respondents anticipated negative impacts vs. 23% who anticipated positive ones (Figure 4.10).

Figure 4.10: Anticipated impacts of Moldova joining the EU



Base: N=10317

Question: In your opinion, what impact would Moldova joining the EU have on...?

Respondents from several West and North European countries exhibited higher than average levels of negativity on potential impacts of Moldova's accession. For example, pluralities in Austria (40%), Finland

(32%), France (33%), Germany (32%), Luxembourg (34%) and the Netherlands (32%) – in addition to Czechia (38%) – believed the accession would negatively impact the EU's security. The French were especially pessimistic, with around a third of them also anticipating detrimental effects on their country's economy (33%), security (36%) and the efficient working of the EU (36%).

On the other hand, respondents in Romania, Estonia, Poland, as well as Ireland and Spain, were more likely than average to anticipate positive rather than negative impacts of Moldova's accession. Romanian respondents were the most optimistic, with almost half of them anticipating the accession would benefit the EU's security (48% vs. 17% anticipating negative impacts), their own country's economy (46% vs. 13%), and their own country's political power within the EU (47% vs. 11%).

At the subgroup level, the proportion of respondents anticipating negative impacts of Moldova's accession was consistently higher than average among people with a poor or no understanding of the EU, those finding it difficult to manage on their income and those with right-leaning political values (Table 4.11).

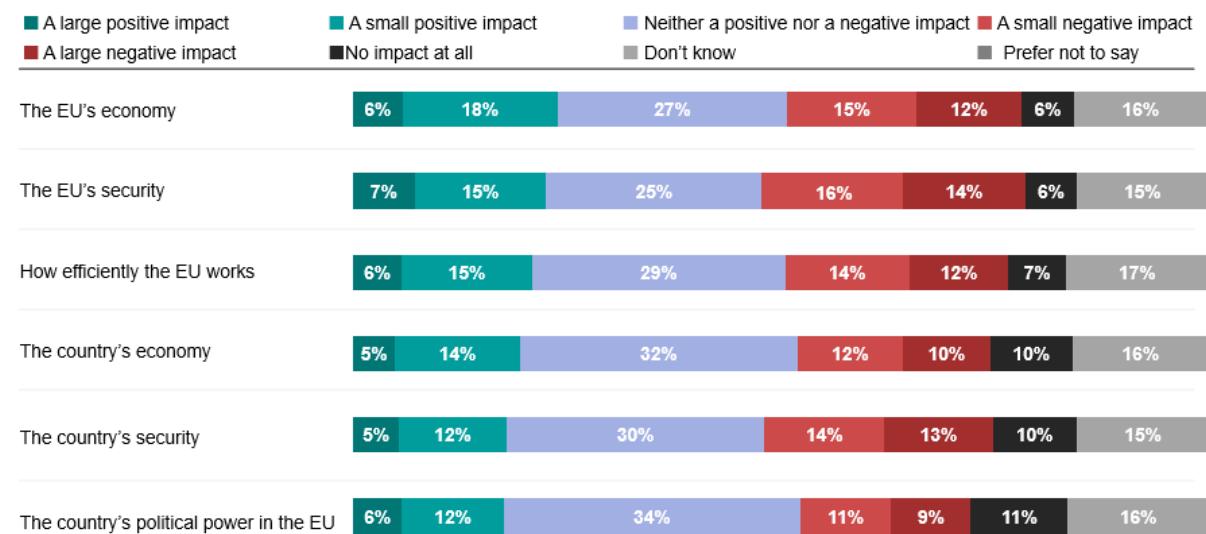
Table 4.11: Anticipated impacts of Moldova joining the EU – by key socio-demographics (%) who anticipated a large/small negative impact)

	The EU's economy	The EU's security	The country's economy
Age			
18-24	21%	20%	18%
25-34	24%	24%	20%
35-44	26%	30%	25%
45-54	29%	28%	24%
55-64	32%	31%	26%
65+	28%	28%	21%
Understanding of the EU			
A great deal/a fair amount	26%	27%	21%
Not very much/nothing at all	30%	29%	26%
Political values			
Right/Centre-right	36%	38%	30%
Centre	26%	26%	21%
Centre-left/Left	23%	22%	18%
No clear orientation	30%	30%	26%
Ease of managing financially			
Very/fairly difficult	30%	29%	26%
Very/fairly easy	26%	26%	20%

4.4.5 Georgia

For Georgia too, views on potential impacts of accession were consistently very mixed. The proportion anticipating positive impacts ranged from 18% to 24%, while the proportion anticipating negative ones ranged from 20% to 31%, and neutral responding ranged from 25% to 34%. As in the case of Moldova, the highest levels of negative responding were in relation to the potential impact of accession on the EU's security (31% anticipated a negative impact vs. 22% who anticipated a positive impact) and its economy (27% vs. 24%) (Figure 4.11).

Figure 4.11: Anticipated impact of Georgia joining the EU



Base: N=10336

Question: *In your opinion, what impact would Georgia joining the EU have on...?*

The country-level results for Georgia were not dissimilar to those for Moldova. Thus, respondents from several West and North European countries exhibited higher than average levels of negativity. For example, pluralities in Austria (40%), Czechia (40%), France (39%), Germany (37%) and Finland (36%) believed Georgia's accession would have a negative impact on the EU's security. Higher than average numbers of respondents in Belgium (33%), Denmark (42%), and Sweden (41%) felt the same way.

In spite of this mixed picture, respondents from several East and North European countries (Latvia, Lithuania, Poland, and Romania), in addition to Portugal, were generally more inclined than average to anticipate favourable rather than unfavourable outcomes of Georgia's accession for the EU's security and economy.

Looking at subgroup differences, the percentage of respondents anticipating positive consequences from Georgia's accession was consistently above average among people residing in large towns or cities, those with a good understanding of the EU, those finding it easy to manage financially and those with left-leaning political values (Table 4.12).

Table 4.12: Anticipated impacts of Georgia joining the EU – by key socio-demographics (%) who anticipated a large/small positive impact)

	The EU's economy	The EU's security	The country's economy
Age			
18-24	29%	24%	22%
25-34	29%	25%	26%
35-44	23%	20%	17%
45-54	23%	21%	20%
55-64	20%	21%	16%
65+	22%	24%	18%
Understanding of the EU			
A great deal/a fair amount	29%	28%	25%
Not very much/nothing at all	14%	14%	11%
Political values			
Right/Centre-right	17%	16%	15%
Centre	18%	16%	15%
Centre-left/Left	31%	30%	25%
No clear orientation	24%	24%	18%
Urbanity/rurality			
Rural area/village	20%	19%	17%
Small or medium-sized town	21%	21%	17%
Large town or city	29%	27%	24%
Ease of managing financially			
Very/fairly difficult	20%	19%	17%
Very/fairly easy	27%	25%	22%

5 VIEWS ON CRITERIA AND CONSIDERATIONS FOR EU MEMBERSHIP

This chapter examines respondents' views on criteria for EU membership, and on candidate countries having access to EU membership benefits during accession. It also considers wider factors influencing views on accession, including the granting of veto power to new member countries.

5.1 Perceived importance of different criteria for EU membership

Respondents were presented with a list of criteria for EU membership (actual and potential) and asked how important they felt these were.

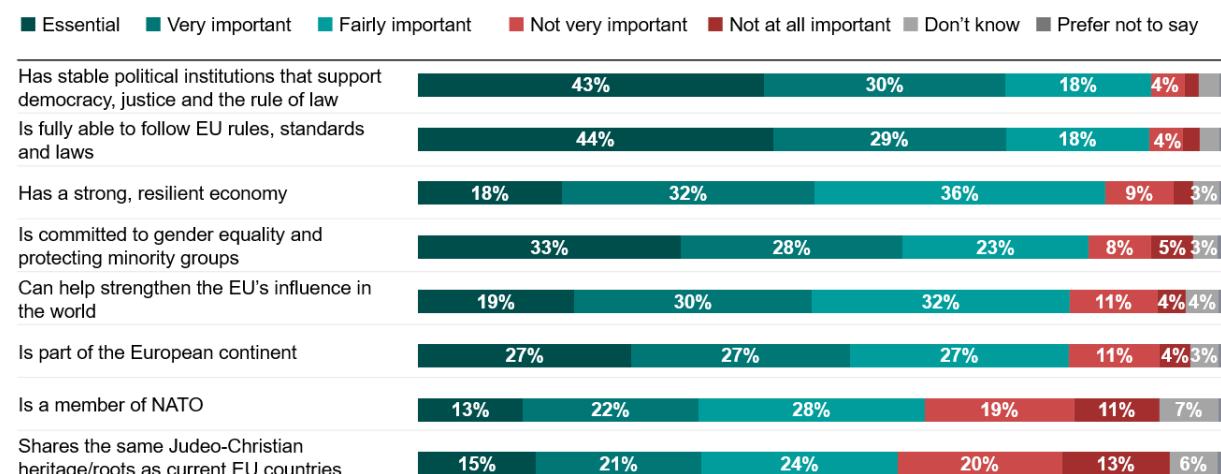
Each criterion was seen as important by a majority, albeit the size of the majority varied to an extent (Figure 5.1). In relative terms, respondents placed the greatest emphasis on potential member countries having stable political institutions that support democracy, justice, and the rule of law (91% considered this essential or very/fairly important), and on those countries being able to follow EU rules, standards, and laws (91%), and having a strong, resilient economy (85%).

A commitment to gender equality and the protection of minority groups also ranked relatively highly, with 83% of respondents considering this essential or very/fairly important. Similarly, the extent to which a potential member country could help strengthen the EU's influence in the world was considered essential or very/fairly important by 81%.

While 81% also considered being part of the European continent as essential or very/fairly important, a significantly lower majority (60%) felt potential countries must share the same Judeo-Christian heritage or roots as current EU countries. Indeed, a third (34%) of respondents said this was not very or not at all important.

NATO membership too emerged as a relatively lower-ranking criterion, with 63% regarding this as essential or very/fairly important and 29% as not very or not at all important.

Figure 5.1: Perceived importance of different criteria for EU membership



Base: N=25844 (All respondents)

Question: In your opinion, how important, if at all, should each of the following be when deciding if a country should be allowed to join the EU?

The top-two criteria listed above – the ability to follow EU rules, standards and laws, and having stable political institutions – also consistently made up the top-two at the Member State level. The ability to follow EU rules, standards and laws ranked first in 11 countries: Belgium, Czechia, Finland, France, Germany, Ireland, Lithuania, Luxembourg, Malta, Romania and Slovakia. Having stable political institutions ranked first in ten others: Bulgaria, Croatia, Cyprus, Estonia, Greece, Hungary, Italy, Latvia, Spain and Sweden. In the remaining Member States (Austria, Denmark, the Netherlands, Poland, Portugal and Slovenia), the two criteria ranked top equal (Table 5.1).

For other criteria, greater geographical variation was apparent in the findings. This was especially the case in relation to NATO membership. The proportion regarding this as essential or very important ranged from fewer than 20% in Austria (14%), Finland (19%) and Cyprus (19%), to over 40% in Lithuania (48%), the Netherlands (44%), Portugal (44%), Romania (44%), and Latvia (42%). The proportion of respondents who felt NATO membership was *not very* or *not at all* important reached a majority or near-majority level in Austria (59%), Cyprus (48%) and Sweden (47%).

In terms of other country-based variation:

- **Having a strong, resilient economy** was considered essential or very important by higher than average proportions of respondents in Bulgaria (63%), Lithuania (63%), Finland (59%), Malta (59%), Ireland (57%), Slovenia (56%), Cyprus (56%), Austria (56%), Latvia (56%) and Romania (53%), but lower than average proportions of respondents in Poland (44%), Italy (44%) and Greece (46%).
- **A commitment to gender equality and the protection of minority groups** was considered essential/very important by higher than average proportions in a large portion of the South, West and North of Europe, with the figure peaking at 69% in Luxembourg and 68% in Sweden. In contrast, the figure was notably lower than average in two Baltic countries: Latvia and Estonia (33% in both countries).
- **The ability of potential new member countries to strengthen the EU's influence in the world** was considered essential or very important by higher than average proportions in Portugal (64%), Lithuania (63%), Ireland (56%), Malta (57%), Cyprus (56%), Romania (55%), Bulgaria (53%), Latvia (53%) and France (52%). In contrast, this figure was lower than average in Czechia (36%), Austria (40%), Finland (43%), Germany (45%), Hungary (45%), Slovenia (45%) and Sweden (46%).
- **Being part of the European continent** was considered essential or very important by higher than average proportions in Portugal (64%), France (61%), Ireland (59%) and Malta (59%), but lower than average proportions in Estonia (39%), Finland (45%), Hungary (45%), Latvia (46%), Slovenia (48%), Czechia (49%), Italy (49%), Croatia (50%), Lithuania (50%) and Poland (50%).
- **Sharing the same Judeo-Christian heritage/roots** was considered essential or very important by higher than average proportions in Romania (45%), France (41%) and Bulgaria (39%), but by lower than average proportions in the Netherlands (24%), Slovenia (25%), Croatia (28%), Luxembourg (30%), Hungary (30%), Ireland (31%) and Sweden (31%).

Table 5.1: Perceived importance of different criteria for EU membership, by country (% saying each is essential or very important)

	EU27	AT	BE	BG	HR	CY	CZ	DK	EE	FI	FR	DE	EL	HU	IE	IT	LV	LT	LU	MT	NL	PL	PT	RO	SK	SI	ES	SE
Is fully able to follow EU rules, standards and law	73	77	74	69	72	76	70	77	71	81	76	77	69	73	78	67	69	82	84	85	80	65	82	72	69	71	70	79
Has stable political institutions that support democracy, justice and the rule of law	73	77	72	71	73	78	66	77	73	80	74	76	73	75	77	69	71	81	83	84	80	65	82	70	68	71	71	81
Is committed to gender equality and protecting minority groups	60	61	57	48	52	63	53	63	33	61	63	66	61	59	64	63	33	40	69	66	55	46	68	55	40	58	65	68
Is part of the European continent	54	54	52	52	50	51	49	51	39	45	61	55	54	45	59	49	46	50	53	59	55	50	64	53	50	48	54	54
Has a strong, resilient economy	49	56	49	63	47	56	50	49	50	59	51	52	46	47	57	44	56	63	46	59	50	44	51	53	47	56	47	48
Can help strengthen the EU's influence in the world	49	40	46	53	49	56	36	50	46	43	52	45	46	45	56	50	53	63	49	57	47	50	64	55	48	45	51	46
Shares the same Judeo-Christian heritage/roots as current EU countries	35	32	31	39	28	37	37	32	33	29	41	36	32	30	31	38	27	34	30	30	24	31	32	45	37	25	35	31
Is a member of NATO	35	14	36	35	32	19	28	39	34	19	36	36	25	29	33	34	42	48	42	28	44	37	44	42	29	28	36	19

Subgroup analysis of the findings revealed mixed views, depending on the criteria under consideration (Table 5.2). Most notably:

- Older respondents were more likely than younger ones to attach importance to being committed to gender equality and the protection of minority groups and being part of the European continent. Working-age respondents (25-44 year olds) were more likely than other age groups to attach importance to NATO membership.
- Respondents with right-leaning political values were more likely than those with centre or left-leaning values to attach importance to having a strong economy, being part of the European continent, and sharing the same Judeo-Christian roots or heritage as existing member countries. Respondents with left-leaning political values were more likely than those with right-leaning ones to prioritise commitment to gender equality and the protection of minorities, and the ability of potential member countries to strengthen the EU's influence in the world.
- Respondents with a good understanding of the EU were more likely than those with a poor or no understanding to attach importance to potential member countries having a strong economy, being able to strengthen the EU's influence in the world, being part of the European continent, NATO membership, and sharing same Judeo-Christian roots or heritage as existing member countries.

Table 5.2: Perceived importance of different criteria for EU membership, by key socio-demographics (% saying each criteria is essential or very important)

	Age						Understanding of the EU		Political values			
	18-24	25-34	35-44	45-54	55-64	65+	A great deal/a fair amount	Not very much/nothing at all	Right/Centre-right	Centre	Centre-left/Left	No clear orientation
Is fully able to follow EU rules, standards and law												
Is fully able to follow EU rules, standards and law	68%	68%	71%	73%	76%	77%	77%	67%	71%	66%	77%	77%
Has stable political institutions that support democracy, justice and the rule of law	68%	68%	71%	74%	75%	77%	77%	67%	70%	67%	77%	77%
Is committed to gender equality and protecting minority groups	58%	59%	59%	59%	61%	63%	64%	54%	44%	53%	73%	63%
Is part of the European continent	45%	48%	53%	55%	56%	58%	57%	49%	59%	47%	55%	57%
Has a strong, resilient economy	42%	48%	51%	51%	51%	49%	51%	46%	58%	43%	48%	51%
Can help strengthen the EU's influence in the world	45%	49%	50%	48%	49%	51%	52%	44%	48%	43%	53%	50%
Shares the same Judeo-Christian heritage/roots as current EU countries	27%	36%	37%	36%	35%	37%	39%	30%	44%	29%	34%	37%
Is a member of NATO	30%	39%	37%	33%	32%	36%	38%	29%	34%	29%	38%	38%

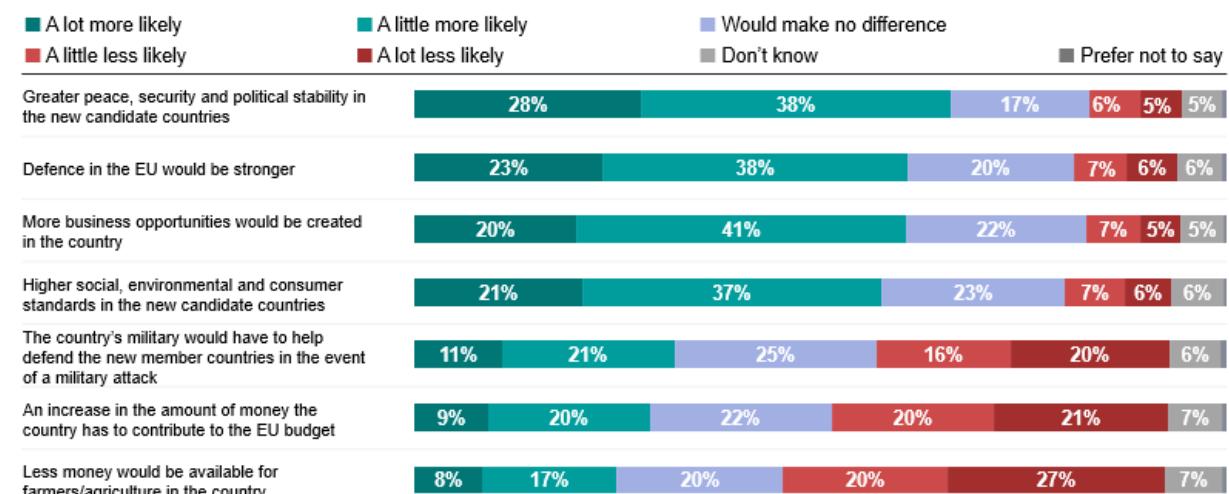
5.2 Factors influencing support for accession

Respondents were also asked about specific considerations that would make them more or less likely to support candidate countries becoming members of the European Union.

Almost seven in ten (66%) said they would be more likely to support accession if it led to greater peace, security, and political stability in the candidate countries. Similarly, around six in ten said they would be more supportive if it meant stronger EU defence (61%), more business opportunities in their own countries (60%), or higher social, environmental, and consumer standards in the candidate countries (57%). Only between 11% and 13% stated that any of these factors would make them *less* likely to support accession, while between 17% and 23% remained neutral.

Considerations that notably fewer respondents said would positively impact their support for accession were those invoking cost or resource implications for their own country – namely, if their country's military would have to defend the new member state (32%), if their country would have to contribute more to the EU budget (29%), or if less money would be available for their country's farmers (25%). In each case, more respondents said these considerations would make them *less* likely to support accession (36%, 41% and 47% respectively) (Figure 5.2).

Figure 5.2: Factors likely to influence support for candidate countries joining the EU



Base: N=25844 (All respondents)

Question: *Would you be more or less likely to support candidate countries becoming members of the EU if you knew this would mean..*

There were some notable geographical patterns of response to this question. In particular:

- An increased likelihood of supporting accession if it led to *greater peace* and if it led to *stronger defence in the EU* was highest in Estonia (78% in both cases), Lithuania (76% and 74%) and also in Portugal (84% and 81%).
- An increased likelihood of supporting accession if it led to *more business opportunities in the respondents' countries* was also highest in Estonia (74%), Lithuania (72%) and Portugal (81%). Notably though, the figure fell below 50% in Austria (48%).
- A decreased likelihood of supporting accession if *existing Member States' militaries would have to defend the new member state* reached a majority level in Malta (60%), Austria (54%), Finland (51%) and Czechia (50%);
- A decreased likelihood of supporting accession if *existing member states would have to contribute more to the EU budget* reached a majority level in Czechia (64%), Finland (64%), Sweden (58%), Slovenia (54%) and Malta (53%);

- A decreased likelihood of supporting accession *if it meant less money would be available for existing Member States' agriculture* exceeded 50% in Malta (73%), Czechia (63%), Finland (62%), Sweden (62%), Portugal (60%), Slovenia (59%), Estonia (56%), France (55%), Belgium (54%), Greece (54%), Slovakia (52%), Ireland (52%) and Croatia (50%).

At the subgroup level, an increased likelihood of supporting accession if it led to *greater peace, security and political stability; more business opportunities; higher social, environmental, and consumer standards in the new member countries; or stronger defence in the EU* was consistently highest among respondents with a good understanding of the EU, those with a high level of education, those with left-leaning political values, and those who found it easy to manage on their income (Table 5.3).

A decreased likelihood of supporting accession *if existing Member States had to contribute more to the EU budget; if less money would be available for existing Member States farmers* consistently reached a majority (or near majority) among respondents with right-leaning political values and those with a poor/no understanding of the EU (Table 5.4).

Table 5.3: Factors likely to influence support for candidate countries joining the EU, by key socio-demographics (% saying each made them a lot/a little more likely to support accession)

	Understanding of the EU		Political values				Education			Ease of managing financially	
	A great deal/a fair amount	Not very much/nothing at all	Right/Centre-right	Centre	Centre-left/Left	No clear orientation	Low	Mid	High	Very/fairly difficult	Very fairly easy
Greater peace, security and political stability	70%	59%	56%	61%	73%	68%	61%	63%	69%	63%	69%
More business opportunities in the existing member countries	65%	53%	55%	56%	66%	63%	51%	58%	65%	57%	64%
Higher social, environmental, and consumer standards in the new member countries	64%	48%	44%	52%	67%	59%	47%	54%	62%	53%	61%
Stronger defence in the EU	65%	54%	53%	57%	66%	63%	51%	58%	65%	57%	64%
Existing Member States have to contribute more to the EU budget	33%	22%	23%	24%	35%	30%	31%	29%	29%	28%	30%
Less money is available for existing Member States' agriculture	28%	19%	21%	20%	29%	26%	28%	25%	24%	24%	26%
Existing Member States' military would have to defend the new member state	36%	26%	25%	26%	39%	33%	34%	32%	31%	31%	33%

Figure 5.4: Factors likely to influence support for candidate countries joining the EU, by key socio-demographics (% saying each made them a lot/a little less likely to support)

	Understanding of the EU		Political values			
	A great deal/a fair amount	Not very much/nothing at all	Right/ Centre-right	Centre	Centre-left/Left	No clear orientation
Greater peace, security and political stability						
Greater peace, security and political stability	10%	14%	17%	12%	8%	12%
More business opportunities in the existing member countries	10%	14%	19%	11%	9%	12%
Higher social, environmental, and consumer standards in the new member countries	12%	16%	22%	12%	9%	14%
Stronger defence in the EU	12%	14%	19%	12%	10%	13%
Existing Member States have to contribute more to the EU budget	38%	47%	57%	43%	33%	42%
Less money is available for existing Member States' agriculture	44%	52%	58%	47%	41%	47%
Existing Member States' military would have to defend the new member state	33%	41%	50%	35%	29%	37%

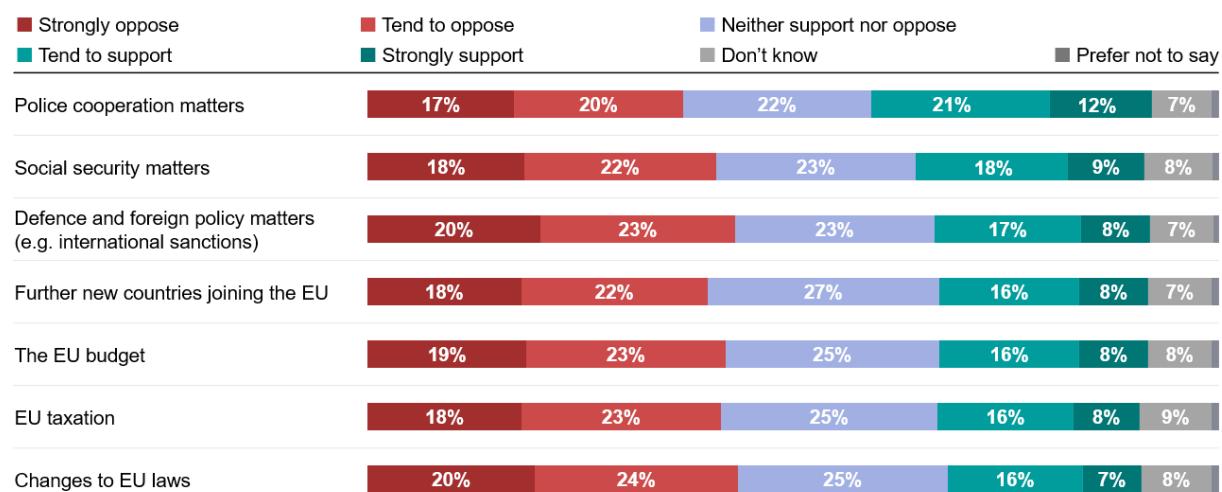
5.2.1 Views on veto power for new member countries

To further explore views on implications of new countries joining the EU, respondents were asked whether they would support or oppose the granting of veto power to such countries across various policy areas. While the findings were somewhat mixed, **there was a general tendency for respondents to lean more towards opposition than support for such veto power.**

Thus in the case of foreign policy, changes to EU laws and EU taxation matters, just over two in five opposed the veto power while just over one in five supported it. Similarly, in the case of social security laws, opposition stood at 41% while support stood at 27%. Police cooperation matters was the only policy area for which opposition and support were more evenly balanced, at 37% vs. 33%.

Across all policy areas, approximately a quarter of respondents (22% to 27%) maintained a neutral stance on the veto power.

Figure 5.3: Views on veto power for new member countries



Base: N=25844 (All respondents)

Question: To what extent would you support or oppose them being able to block decisions taken by the EU on matters relating to...?

At the country level, findings were broadly in line with the EU-level findings, with respondents generally more likely to oppose than support veto power for new member countries across the various policy areas. Indeed, opposition reach a majority level in at least some countries for each of the policy areas:

- *Changes to EU laws:* Luxembourg (63% opposed), Finland (57%), Estonia (53%), Portugal (52%), Sweden (51%), Lithuania (51%) and the Netherlands (50%);
- *The EU budget:* Luxembourg (61% opposed), Lithuania (54%), Estonia (53%), the Netherlands (52%), Latvia (51%), Belgium (51%) and Finland (50%);
- *Defence and foreign policy matters:* Estonia (59% opposed), Finland (59%), Luxembourg (56%), Lithuania (55%), Sweden (55%) and Latvia (54%);
- *Social security matters:* Luxembourg (57% opposed), Finland (56%), Sweden (52%), Belgium (50%) and the Netherlands (50%);
- *EU taxation:* Luxembourg (55% opposed), Finland (53%), the Netherlands (52%), Belgium (50%) and Lithuania (50%);
- *Further new countries joining the EU:* Luxembourg (54% opposed), Estonia (51%), and Lithuania (50%);
- *Police cooperation matters:* Luxembourg (51%) and Estonia (50%).

The only policy area for which slightly more respondents supported than opposed veto power in some countries was police cooperation matters. The countries concerned were: Austria (41% support vs. 32% opposition), Poland (40% vs. 26%), Germany (39% vs. 34%), Bulgaria (38% vs. 31%), Hungary (37% vs. 35%) and Czechia (36% vs. 27%).

At the subgroup level, opposition to veto power for new member countries was consistently highest (though generally short of a majority) among people aged 65 and over and those with right-leaning political values (Table 5.5).

Table 5.5: Views on veto power for new member countries, by key socio-demographics (% who strongly/tend to oppose this in each policy area)

	Age						Political values			
	18-24	25-34	35-44	45-54	55-64	65+	Right/ Centre-right	Centre	Centre-left/Left	No clear orientation
Police cooperation matters										
Police cooperation matters	29%	30%	33%	38%	42%	43%	40%	33%	39%	37%
Social security matters	31%	32%	36%	40%	46%	49%	45%	35%	43%	41%
Defence and foreign policy matters	37%	35%	37%	44%	48%	51%	49%	39%	44%	42%
Further new countries joining the EU	31%	31%	35%	41%	45%	47%	47%	36%	39%	39%
The EU budget	32%	33%	34%	42%	48%	51%	48%	37%	42%	42%
EU taxation	33%	35%	35%	42%	47%	48%	48%	35%	42%	43%
Changes to EU laws	37%	36%	36%	42%	49%	52%	48%	38%	45%	44%

5.3 Support for access to EU membership benefits during accession

There were varying views on whether or not candidate countries should be able to enjoy specific benefits of EU membership during accession (Figure 5.4).

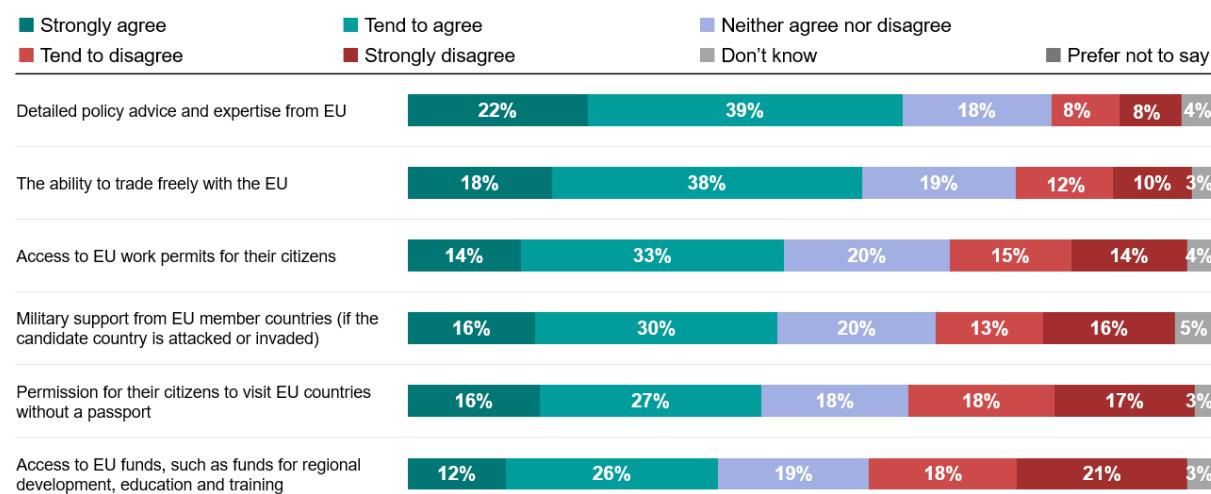
On the one hand, approximately three in five respondents (61%) agreed that candidate countries should have access to detailed policy advice and expertise from the EU. A similar proportion (56%) agreed that candidate countries should be able to trade freely with the EU.

On the other hand, opinion was divided over whether candidate countries should be able to access EU work or visitor permits for their citizens, or receive military support from the EU if attacked or invaded. In each case, fewer than half agreed, while significant portions (ranging from 29% to 35%) disagreed.

More polarising still was the question of whether candidate countries should be able to access EU funds during accession, with respondents almost evenly split between agreement (38%) and disagreement (39%).

For all of the benefit types, approximately one in five respondents (18% to 20%) maintained a neutral stance, neither agreeing nor disagreeing.

Figure 5.4: Views on candidate countries being able to access benefits of EU membership before joining



Base: N=25844 (All respondents)

Question: Do you agree or disagree that candidate countries should be able to start accessing the following types of benefits?

As shown in Table 5.6, **respondents in East and South-East European countries tended to show higher levels of agreement across most of the benefit types, while those in West and North European countries exhibited lower levels of agreement**. However, there were two exceptions to this trend:

- Malta – which showed relatively high levels of *disagreement* with countries being able to access the various benefits during accession;
- The Baltic countries (Estonia, Latvia and Lithuania) – which showed relatively high levels of *agreement* with countries being able to access certain benefits during accession, namely: detailed policy advice and expertise, military support and free trade.

Respondents in Romania, Estonia and Lithuania were among the most likely to agree with candidate countries trading freely with the EU (69%, 68% and 67% respectively), while respondents in France were the least likely to do so (44%). Agreement with candidate countries accessing EU work permits

and visitor permits (i.e. passport-free travel) was highest in Romania (62% and 58% respectively), Spain (57% and 58% respectively) and Italy (50% and 53%), and lowest in Denmark (35% and 25%) and Luxembourg (35% and 28% respectively).

Agreement with candidate countries receiving military support from EU countries was highest in the Baltic countries – Estonia (60%), Lithuania (54%), Latvia (52%) – as well as Romania (58%), Portugal (54%), and Spain (54%). Those in Czechia, Austria and Malta were the least likely to agree with this (31%, 34% and 36% respectively).

The proportion of respondents who agreed with candidate countries accessing EU funds was highest in Romania, Spain and Cyprus, where it reached or exceeded 50% (57%, 48% and 47% respectively). Conversely, the proportion who disagreed was highest in Luxembourg (52%), the Netherlands (50%), France (49%) and Sweden (49%) – as well as Czechia (54%). The proportion of respondents who agreed with candidate countries accessing EU policy advice and expertise exceeded 70% in Lithuania (75%), Estonia (74%), Portugal (73%), Latvia (71%) and Romania (71%).

Table 5.6: Views on candidate countries being able to access benefits of EU membership before joining, by country (% who strongly or tend to agree)

	EU27	AT	BE	BG	HR	CY	CZ	DK	EE	FI	FR	DE	EL	HU	IE	IT	LV	LT	LU	MT	NL	PL	PT	RO	SK	SI	ES	SE
Detailed policy advice and expertise from the EU	61	60	53	59	68	68	48	57	74	61	55	66	61	67	58	55	71	75	62	65	49	62	73	71	58	59	69	54
The ability to trade freely with the EU	56	57	49	64	54	52	50	48	68	52	44	64	57	63	52	57	63	67	53	59	50	51	53	69	52	50	62	47
Access to EU work permits for their citizens	46	40	36	54	41	43	35	35	42	39	36	51	49	48	44	50	42	55	35	32	31	47	50	62	47	42	57	36
Military support from EU member countries (if the candidate country is attacked or invaded)	46	35	43	45	45	48	31	40	60	43	44	45	42	40	45	44	52	54	39	36	43	46	54	58	40	41	54	42
Permission for their citizens to visit EU countries without a passport	44	31	35	47	34	45	30	25	37	30	38	45	50	35	33	53	34	38	28	27	31	41	44	58	40	39	58	27
Access to EU funds, such as funds for regional development, education and training	38	36	29	42	41	47	22	28	33	29	31	43	42	38	42	38	36	39	28	34	26	36	41	57	30	35	48	29

For four of the six types of benefit considered – access to EU work permits and visitor permits, military support, and access to EU funds – younger respondents expressed higher level of agreement than older ones. For example, approaching half of 18-24 year olds (45%) and 25-34 year olds (46%) agreed with potential member countries being able to access EU funds, compared with, for example, 33% of those aged 65 and over.

Higher levels of agreement were also consistently found among respondents living in large towns or cities, those with a good understanding of the EU, those with a high level of education, those who found it easy to manage on their income, and those with left-leaning political values (Table 5.7).

Table 5.7: Views on candidate countries being able to access benefits of EU membership before joining, by key socio-demographics (% who strongly or tend to agree on each)

	Detailed policy advice and expertise from the EU	The ability to trade freely with the EU	Access to EU work permits for their citizens
Age			
18-24	53%	56%	50%
25-34	62%	58%	54%
35-44	60%	57%	48%
45-54	61%	52%	42%
55-64	61%	54%	41%
65+	64%	58%	46%
Education			
Low	49%	51%	40%
Mid	58%	55%	45%
High	66%	58%	49%
Political values			
Right/Centre-right	53%	47%	35%
Centre	55%	50%	39%
Centre-left/Left	69%	64%	57%
No clear orientation	63%	58%	48%
Urbanity/rurality			
Rural area/village	59%	52%	44%
Small or medium-sized town	59%	56%	44%
Large town or city	65%	59%	51%
Understanding of the EU			
A great deal/a fair amount	68%	61%	52%
Not very much/nothing at all	50%	48%	38%
Ease of managing financially			
Very/fairly difficult	56%	53%	44%
Very/fairly easy	66%	59%	49%

6 PREFERENCES FOR FUTURE ENLARGEMENT DECISION-MAKING

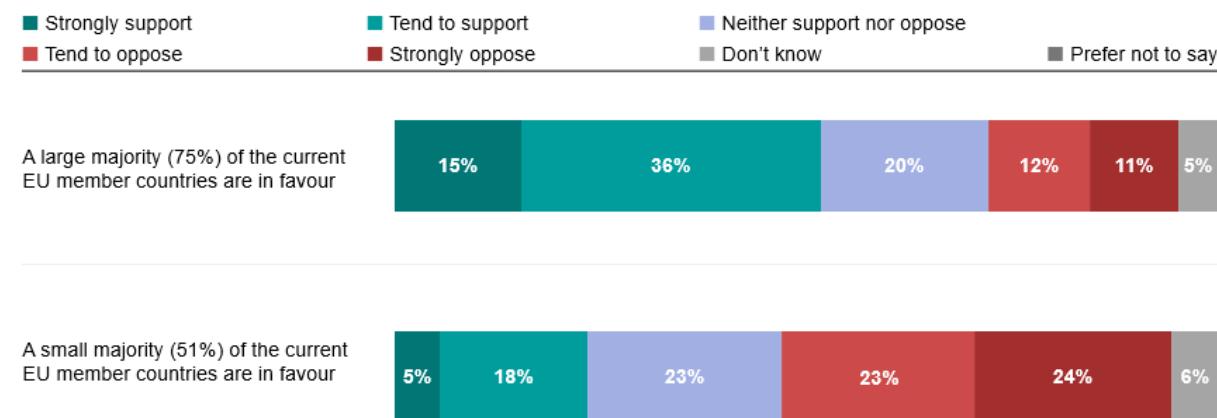
This chapter details respondents' views on different approaches to voting on enlargement, their appetite for more information on the risks and benefits of enlargement, and for citizens having a more direct say in the process.

6.1 Support for different approaches to voting on enlargement

After being informed about the current unanimity requirement for enlargement decision-making, respondents were asked whether they would support alternative voting approaches – specifically, whether they felt a candidate country should be allowed to join the EU if: a) a large majority (75%) of the current member countries were in favour; and b) a small majority (51%) of those countries were in favour.

Just over half of respondents (51%) expressed support for the large majority voting approach, while 23% opposed this, and 20% were neutral. **The small majority approach met with less enthusiasm:** only 23% supported the idea, while nearly half (47%) opposed it and another 23% were neutral (Figure 6.1).

Figure 6.1: Support for different approaches to voting on enlargement



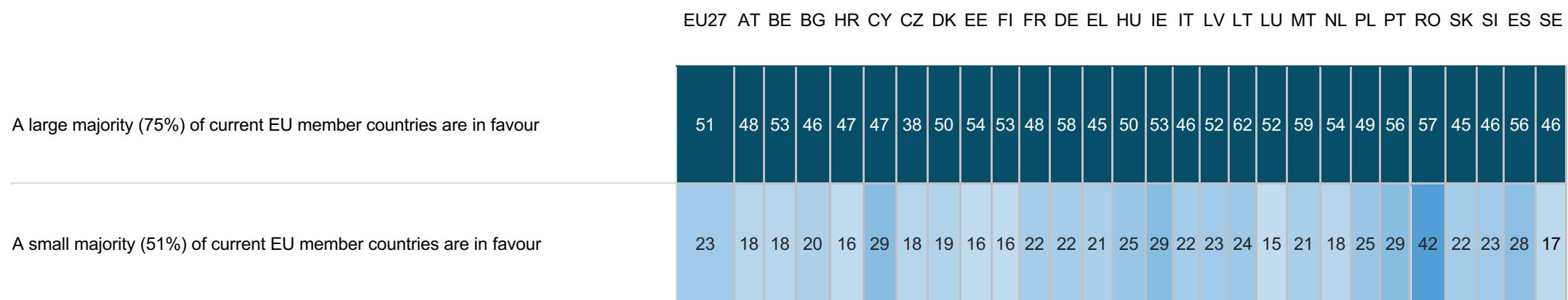
Base: N=25844 (All respondents)

Question: All current EU member countries have a say on whether candidate countries can join the EU. A candidate country is only allowed to join if all of the current EU member countries support this. To what extent would you support or oppose a different approach, where a candidate country can join the EU if...

As Table 6.1 shows, support for the *large majority voting approach* held at a majority level in more than half of Member States, peaking at 62% in Lithuania. It fell to 45% or lower in Czechia (38%), Greece (45%) and Slovakia (45%).

Support for the minority voting approach consistently remained at a minority level in all Member States, ranging from just 15% in Luxembourg to 42% in Romania.

Table 6.1: Support for different approaches to voting on enlargement, by country - % who strongly or tend to favour each voting approach



Across all socio-demographic groups, the findings mirrored those at the EU level, with support for the large majority voting approach consistently exceeding opposition, and support for the small majority approach generally being lower than opposition.

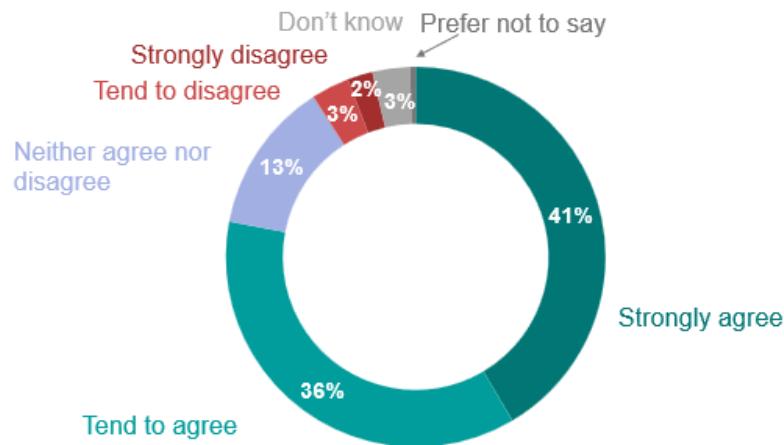
Support for the large majority approach was highest among males (54% vs. 49% of females), those with a good understanding of the EU (56% vs. 45% of those with poor/no understanding), those with a high level of education (55% vs. 46% of those with low level), and those with left-leaning political values (60% vs. 41% of those with right-leaning values).

In the case of the small majority approach, opposition was most pronounced among older cohorts (52% of respondents aged 65 and over vs., for example, 44% of 18-24 year olds), those with a high level of education (50% vs. 39% of those with a low level), and those with right-leaning political values (60% vs. 42% of those with left-leaning values).

6.2 Appetite for information on benefits and risks of enlargement

Nearly eight in ten respondents (78%) agreed that they would like to receive more information from the EU regarding the benefits and risks of new countries joining the EU. Around one in ten (13%) neither agreed or disagreed, while just 5% disagreed (Figure 6.2).

Figure 6.2: Appetite for information on benefits and risks of enlargement

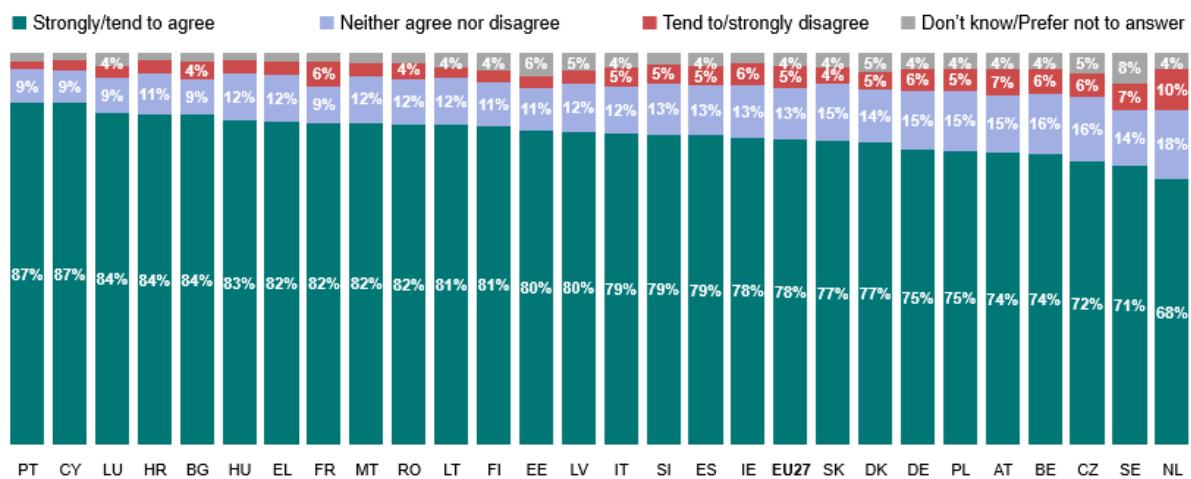


Base: N=25844 (All respondents)

Question: To what extent do you agree or disagree that you would like to receive more information from the EU on the benefits and risks of new countries joining the EU?

These results were broadly replicated across all Member States, with the Netherlands being the only country where agreement fell below 70% (at 68%). Cyprus and Portugal had the highest level of agreement, at 87% in both cases (Figure 6.3).

Figure 6.3: Appetite for information on benefits and risks of enlargement, by country



Base: N=25844 (All respondents)

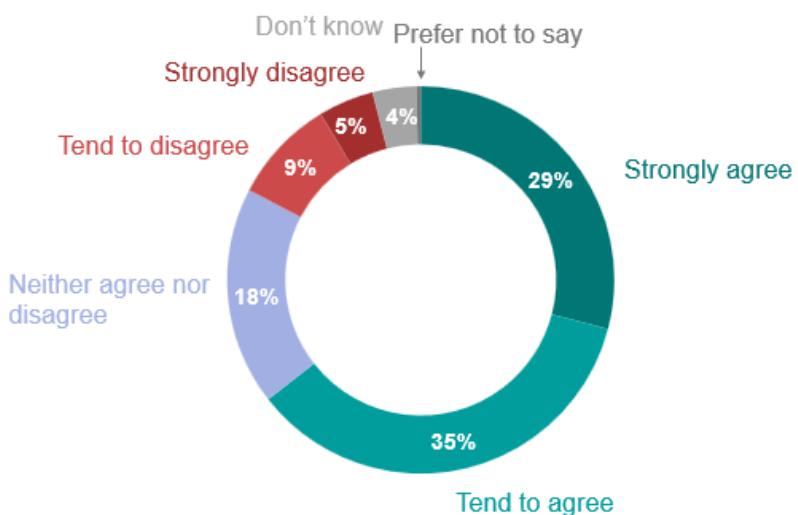
Question: To what extent do you agree or disagree that you would like to receive more information from the EU on the benefits and risks of new countries joining the EU?

At the subgroup level, the appetite for information on the benefits and risks of enlargement generally increased with age (from 70% of those aged 18-24 to 83% of those aged 65 and over). It was also higher among those with a high level of education (82% vs. 71% of those with a low level), those with a good understanding of the EU (83% vs. 71% of those with a poor/no understanding) and those with left-leaning political values (83% vs. 77% of those with centre-right/right values).

6.3 Support for citizens having a more direct say on enlargement

Approaching two-thirds of respondents (64%) agreed that EU citizens should have a more direct say on which countries should be allowed to join the EU, while 18% neither agreed nor disagreed, and 13% disagreed (Figure 6.4).

Figure 6.4: Support for citizens having a more direct say on enlargement

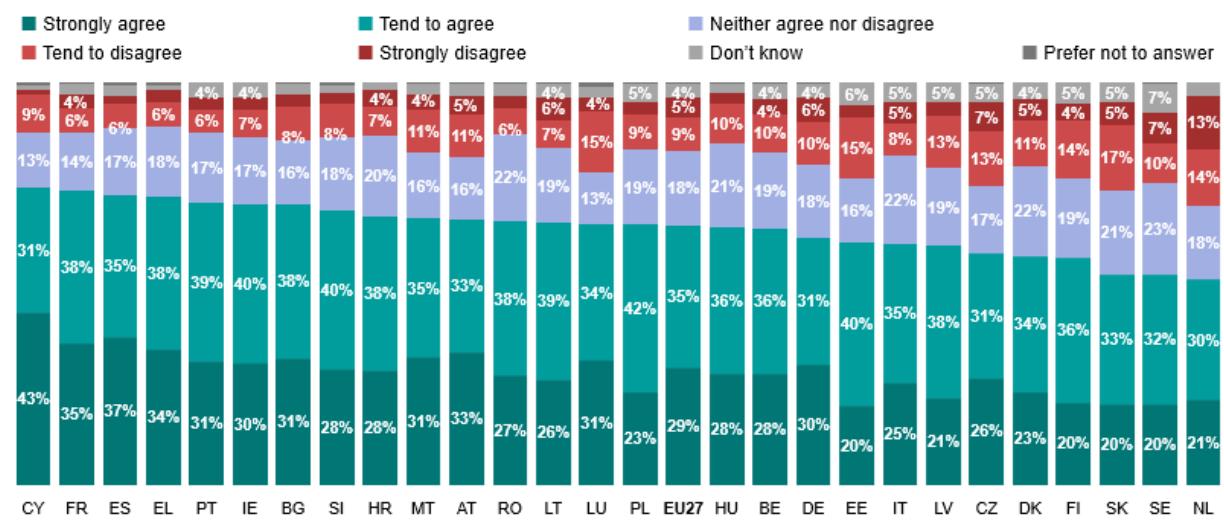


Base: N=25844 (All respondents)

Question: To what extent do you agree or disagree that EU citizens themselves should have a more direct say on which countries are allowed to join the EU?

Agreement held at a majority level in all EU countries and was highest in Cyprus (74%), France (73%), Spain (72%), Greece (71%), Ireland (70%), Portugal (70%), Bulgaria (69%) and Slovenia (68%). It was comparatively lower in the Netherlands (51%), Sweden (52%) and Slovakia (52%) (Figure 6.5).

Figure 6.5: Support for citizens having a more direct say on enlargement, by country



Base: N=25844 (All respondents)

Question: To what extent do you agree or disagree that EU citizens themselves should have a more direct say on which countries are allowed to join the EU?

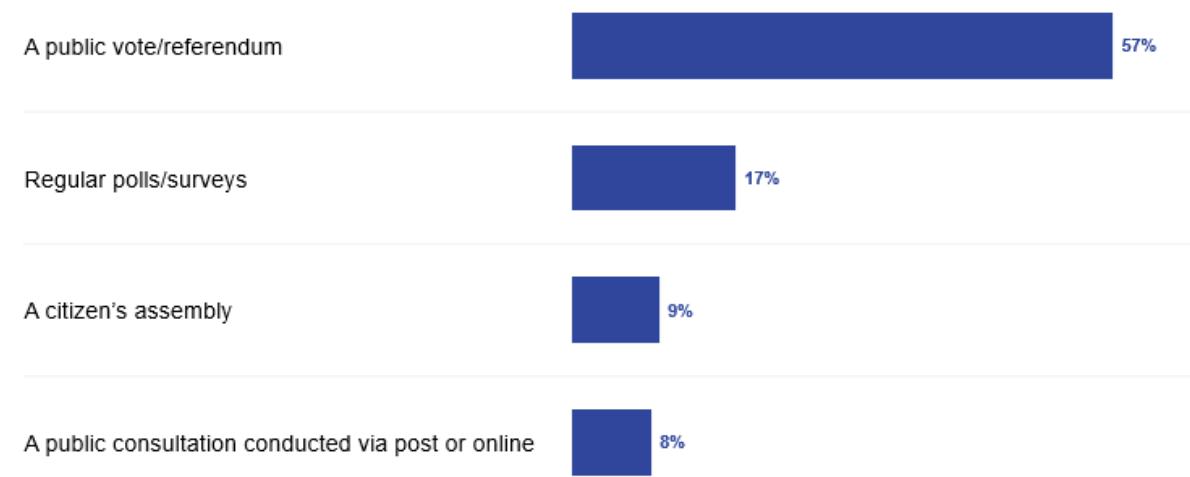
At the subgroup level too, agreement never fell short of a majority level. It was highest among:

- respondents aged 55-64 and 65 and over (68% and 65% respectively, vs. 60% of those aged 18-24 and 62% of those aged 25-34);
- those opposed to the EU in general (70% vs. 63% of those in favour);
- those against further EU enlargement (70% vs. 57% of those indifferent about it and 66% of those in favour);
- those with right/centre-right political values (71% vs. 58% of those with centre values and 66% of those with left/centre-left values).

6.4 Preferred means for giving citizens a say on enlargement

Of those respondents who agreed with the idea of more citizen involvement in decisions on enlargement, a majority favoured a public vote or referendum (57%). Other mechanisms proved much less popular – just 17% favoured regular polls or surveys, while half as many favoured a citizen's assembly (9%) or public consultation (8%) (Figure 6.6).

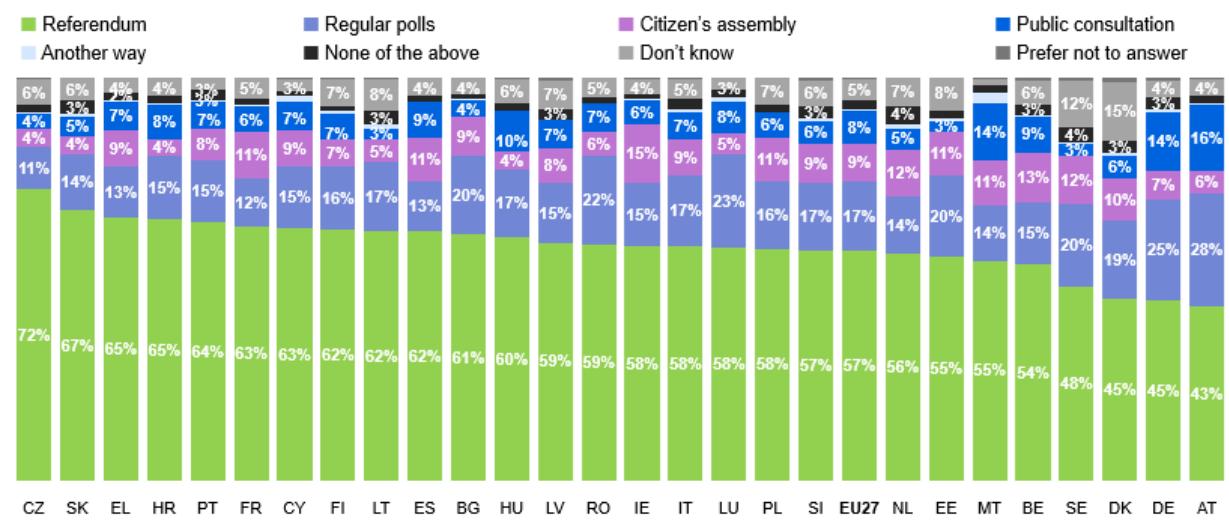
Figure 6.6: Preferred means for giving citizens a say on enlargement



*Base: N=21138 (EU citizens should have a direct say on which countries should join EU)
Question: Which, if any, of the following would be the best way to let EU citizens have a more direct say on which countries should be able to join the EU?*

The relative popularity of the different means for giving citizens a say on enlargement was broadly consistent across all Member States. Thus, a public vote or referendum was the preferred method in every country, with the proportion of respondents selecting it ranging from 43% (Austria) to 72% (Czechia). Regular polls or surveys were the second most popular method in all countries, selected by between 11% and 28% (Figure 6.7).

Figure 6.7: Preferred means for giving citizens a say on enlargement, by country



*Base: N=21138 (EU citizens should have a direct say on which countries should join EU)
Question: Which, if any, of the following would be the best way to let EU citizens have a more direct say on which countries should be able to join the EU?*

At the subgroup level too, a public vote or referendum and regular polls or surveys held as the preferred means of giving citizens a say on enlargement. Still, the absolute numbers mentioning each of these options varied to an extent (Table 6.2):

- Support for a public vote or referendum was greatest among males, those with a high level of education, and those with right-leaning political values.
- Support for regular polls/surveys and citizen's assemblies increased inversely with age and was also slightly higher than average among respondents with a low level of education and with left-leaning political values.
- The appetite for a public consultation-based approach to involving citizens generally *increased* with age (though only to a small degree), and was also slightly higher among females than males.

Table 6.2: Preferred means for giving citizens a say on enlargement, by key socio-demographics

	A public vote/referendum	Regular polls/surveys	A citizen's assembly	A public consultation via post or online
Age				
18-24	50%	22%	15%	6%
25-34	54%	22%	11%	6%
35-44	60%	17%	10%	7%
45-54	59%	16%	7%	10%
55-64	57%	16%	8%	10%
65+	57%	15%	8%	9%
Gender				
Males	60%	16%	9%	7%
Females	54%	18%	10%	10%
Political values				
Right/Centre-right	63%	16%	6%	8%
Centre	51%	18%	10%	9%
Centre-left/Left	57%	18%	10%	8%
No clear orientation	57%	18%	9%	9%
Education				
Low	52%	18%	13%	7%
Mid	55%	18%	9%	9%
High	60%	16%	9%	8%

7 SEGMENTATION ANALYSIS

A segmentation analysis was conducted to synthesise findings presented over the previous chapters and to provide a more concise, action-oriented assessment of how Europeans group (or ‘segment’) when it comes to attitudes towards EU enlargement, deepening and associated themes. Specifically, the analysis explored underlying patterns in relation to eight key dimensions covered in the survey: the perceived impact of EU membership; favourability towards the EU and how this has evolved over the last five years; feelings about the future of the EU and its decision-making powers; opinions on further EU enlargement; views on specific countries joining the EU; and support for candidate countries being able to access EU membership benefits during accession.

Five distinct groups or segments of citizens emerged from the analysis, with the members of each group as like each other, and as different from the members of the other groups, as possible in terms of their responses on the eight dimensions:

- **Group 1: ‘Enlargement enthusiasts’** (25% of the sample) – This group is highly enthusiastic about the European Union and its future trajectory. It strongly supports a growth in the bloc’s decision-making powers and its membership, including the integration of almost all current candidate countries. It also agrees with those countries being able to enjoy benefits of EU membership during accession.
- **Group 2: ‘Enlargement conditionalists’** (24%) – This group too holds generally positive views of the EU and its future, but is more divided than group 1 on the question of enlargement and deepening. It also displays more mixed views on candidate countries being able to enjoy benefits of EU membership during accession.
- **Group 3: ‘Ambivalent critics’** (23%) – This group tends towards dissatisfaction with the EU and the way it is working, and almost half of it wishes to see fewer decisions being taken at the EU level. Like group 2 though, its views on enlargement are mixed and, indeed, it is generally in favour of candidate countries being able to enjoy benefits of membership during accession.
- **Group 4: ‘The disillusioned sceptics’** (22%) – While the majority of this group identifies as European, it is quite critical of the EU and has become more so over recent years. It is also pessimistic about the EU’s future and would like to see fewer decisions taken at the EU level. Reflecting this, the group is negative about enlargement and mainly disagrees with candidate countries being able to access benefits of EU membership during accession. On the other hand, most of the group *does* see a role for the EU in certain policy areas, including foreign policy, migration, the environment, energy, consumer protection, and the economy.
- **Group 5: ‘The hardline sceptics’** (7%) – This group is strongly opposed to the EU, with the majority favouring its abolition. By extension, it is also strongly against further EU deepening or enlargement, or candidate countries being able to access benefits of membership during accession.

Figure 7.1: Segmentation of Europeans' attitudes towards EU enlargement and deepening

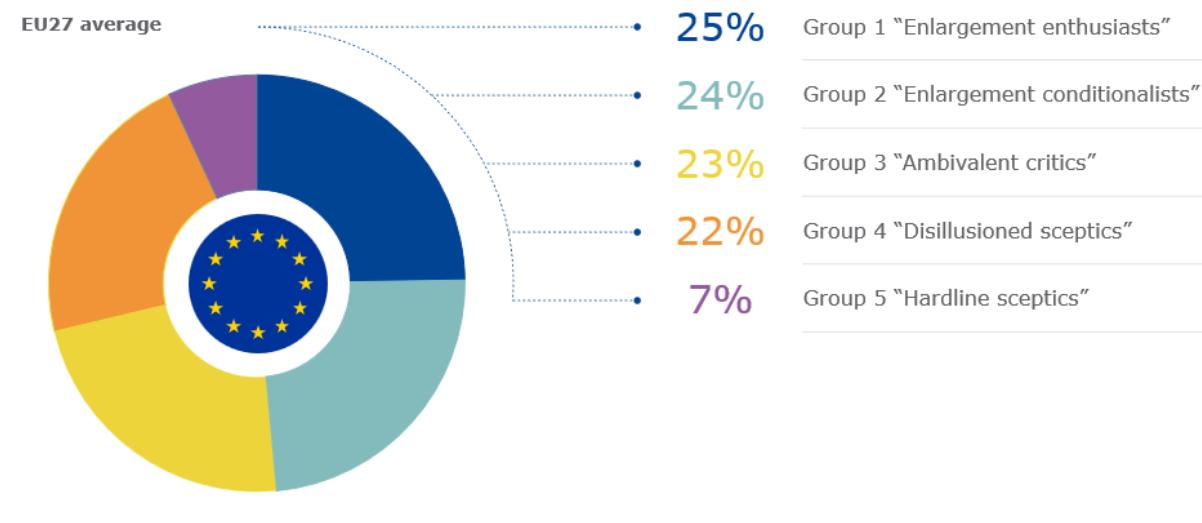
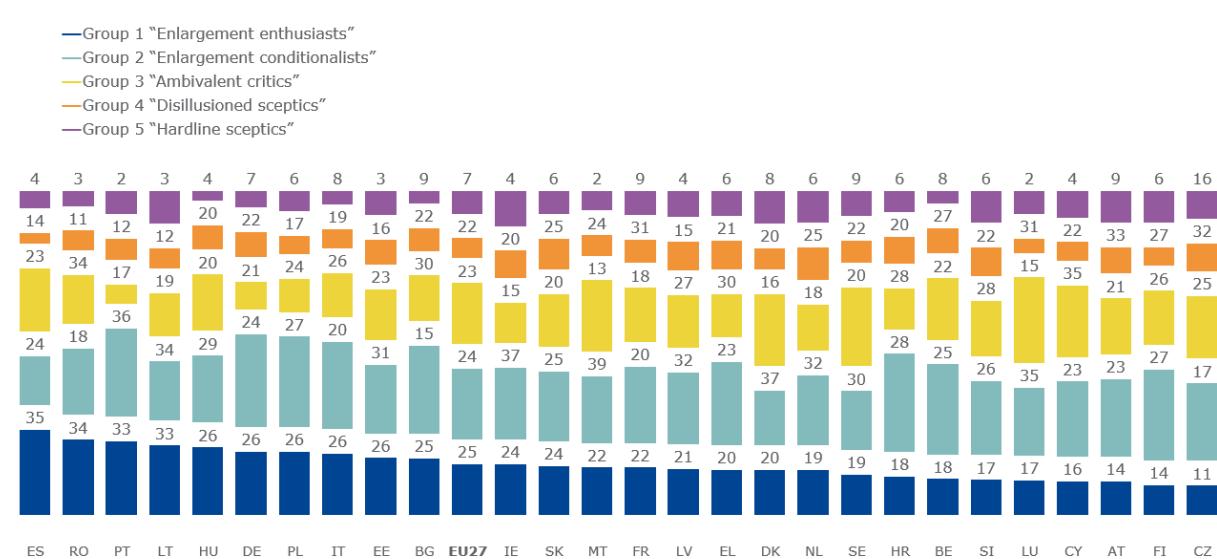


Figure 7.2: Segmentation of Europeans' attitudes towards EU enlargement and deepening, by country



A closer examination of each segment reveals interesting and relevant insights in the context of efforts to envision the future of Europe from a centre-right perspective ahead of the 2024-2029 electoral term.

7.1 Group 1: 'Enlargement enthusiasts'

The enlargement enthusiasts, comprising 25% of the sample, are defined by their markedly positive perspective on the EU and its continued evolution. The group has a significantly higher propensity than any other segment to identify with Europe as a whole (92% of them do so, vs. the average of 76%) and to have a high (subjective) understanding of the EU (81% vs. the average of 63%).

An overwhelming majority of the group (95%) believes their country has benefited from EU membership (compared to 63% on average) and almost all are in favour of the EU, including 66% who are content with its current functioning. Consistent with this, the enlargement enthusiasts display a high level of

optimism about the EU's future and a strong belief that the EU should have more decision-making powers. Indeed, almost a quarter of the group (23%) favours a single European government.

The group also strongly supports further EU enlargement and a majority favour the accession of all current candidate countries apart from Turkey, for which opinions are more divided (41% think Turkey should be allowed to join, vs. 31% who do not). Notably, nearly all members of the group also support candidate countries accessing various benefits of EU membership during the accession process.

Enlargement enthusiasts are significantly more likely than average to regard **climate change and the environment** as the most important issue for the future of Europe (52% vs. 38% on average). They are also more likely to attach priority to **democracy, values, rights and rule of law** (40% vs. 34%); and to **the EU's influence in the world** (14% vs. 10% on average).

At the Member State level, the proportion of enlargement enthusiasts is highest in Spain (35%), Romania (34%), Portugal (33%) and Lithuania (33%), and lowest in Czechia (11%), Austria (14%) and Finland (14%). In terms of the group's socio-demographic profile, members are slightly more likely than average to be male and urban dwellers. They are significantly more likely to hold **left/centre-left political values** (54%, compared to the average of 38%), and significantly less likely to hold right/centre-right values (8% vs. the average of 19%). The group's age profile is broadly in line with the average for all segments.

Given the group's strong support for the EU and its evolution, centre-right political strategies targeting the enlargement enthusiasts should focus on emphasising an ongoing commitment to enlargement, not least as a tool for promoting EU values. Equally important will be an emphasis on the centre-right's commitment to building a sustainable Europe through, for example, the promotion of collective efforts by Member States to reduce greenhouse gas emissions, advancing the circular economy and updating waste legislation.

7.2 Group 2: 'Enlargement conditionalists'

The enlargement conditionalists, comprising 24% of the sample, have a somewhat lower propensity than the enlargement enthusiasts to identify with Europe as a whole, though this propensity is still higher than average (38% vs. 29%). They share group 1's belief that their countries have benefited from EU membership (90%, vs. 95% in group 1 and 63% on average).

Enlargement conditionalists are split between those favouring the EU but *not* its current functioning (50%) and those sceptical about the EU but open to changing their minds if the way it worked really changed (45%). The group is generally optimistic about the EU's future, though split between wanting more decisions taken at the EU level (46%) and wanting the EU to maintain about the same level of power as today (42%). Only 10% of the group favours a move towards a single European government.

Enlargement conditionalists hold mixed views on further EU enlargement and on candidate countries joining the EU – though it is notable that a majority (53%) are against Turkey's accession. They are similarly split on candidate countries accessing various benefits of EU membership during the accession process.

Similar to group 1, enlargement conditionalists are also more likely than average to attach priority to the issues of **climate change and the environment** (45% vs. 38% on average), and to **democracy, values rights and rule of law** (41% vs. 34%).

The proportion of the sample falling into this group is higher than average in much of Northern Europe, including Denmark (37%), Ireland (37%), Lithuania (34%) Latvia (32%), Estonia (31%), Sweden (30%) and Finland (27%). It is similarly high in some countries in the South and West of Europe, including

Malta (39%), Portugal (36%), Luxembourg (35%), the Netherlands (32%) and Croatia (28%). The proportion of the sample falling into this group is lowest in Bulgaria (15%) and Czechia (17%).

In terms of the group's socio-demographic profile, enlargement conditionalists tend to have a more comfortable financial situation and slightly higher education levels than average. The group is also slightly more likely than other segments to hold centrist political values (31% of them do so, vs. 27% on average) and slightly less likely to hold centre-right/right values (13%, vs. 19%). Like group 1, the group does not have a particularly distinct age profile.

To appeal to this group from a centre-right perspective during the 2024-2029 electoral term, policymakers could consider advocating for pragmatic reforms that enhance the EU's efficiency and address the group's concerns about the EU's current functioning and its further enlargement. Additionally, advocating for a balanced approach to decision-making powers, where Member States and the EU play complementary roles, may help play to its split views on the EU's future powers.

7.3 Group 3: 'Ambivalent critics'

Ambivalent critics represent 20% of the sample and are marked by their mixed feelings about the EU and how it should evolve in the future. Nearly half of the group (47%) believes their country has benefited from membership, *however*, an almost identical proportion believe the impact of EU membership has been limited (43%) or negligible (5%). Perhaps reflecting this, the group displays a significantly higher than average propensity to be in favour of the EU but unhappy with its current functioning (56% vs. 41% average) or to be sceptical about the EU but open to changing their minds if the way it works changed (36% vs. 21%). Over half of them (54%) say their image of the EU has worsened in recent years.

Almost half (46%) of the ambivalent critics would like to see fewer decisions taken at the EU level and more at the Member State level, a significantly higher proportion than in groups 1 and 2. Like group 2 though, **the ambivalent critics display mixed views on enlargement, as well as on current candidate countries joining the EU**. At the same time, they generally agree with candidate countries being able to access benefits of EU membership during the accession process, particularly free trade with the EU (78% support this, vs. 56% on average) and policy advice (71% vs. 61%).

Issue-wise, ambivalent critics are more likely than average to attach priority to the **economy, jobs and tackling poverty** (48% vs. 42% on average), as well as to the availability, quality and affordability of **housing** (16% vs. 14%).

In terms of their geographical distribution, the ambivalent critics show higher than average penetration in much of the **South of Europe** – including in Cyprus (35%), Greece (30%), Croatia (28%), Slovenia (28%), Italy (26%) – as well as in Romania (34%) and Bulgaria (29%). Their penetration is lowest in Ireland (15%), Luxembourg (15%) and Malta (13%).

The group is not particularly distinct in terms of its political values or its socio-demographic profile but it does show a higher than average propensity to experience **difficulties managing financially** (52% vs. 45% on average).

To effectively engage ambivalent critics, centre-right policymakers might consider several strategies. First, enhancing EU efficiency by streamlining the EU decision-making process, reducing bureaucracy, and improving transparency could help address the group's dissatisfaction with the EU's current functioning. Second, efforts to promote economic growth, job creation, and boost access to affordable housing are likely to resonate with the group. Third, upholding the right of Member States to determine the competencies of the EU, and potentially revert certain competencies back to the Member States, would cater to their preference for more decisions being taken at the national level. Lastly, advocating for robust EU programmes to prepare candidate countries for membership would demonstrate the

European centre-right's commitment to a cohesive and inclusive Europe, which could address the ambivalent critics' concerns about further enlargement.

7.4 Group 4: 'Disillusioned sceptics'

Disillusioned sceptics, accounting for 22% of the sample, are characterised by their quite negative views of the EU – even though a majority identify with Europe as a whole (59% vs. 76% average) – and by their relatively low understanding of the EU (54% understand little or nothing about it vs. 37% on average). A higher than average proportion of the group believe their country has *not* benefited from EU membership (60% vs. 32%), and are sceptical about the EU but open to changing their minds if the way it works really changed (50% vs. 21% average). This group is also significantly more likely than average to say its image of the EU has worsened in recent years (73% vs. 38%) and to want fewer decisions to be taken at the EU level and more at the national level (66% vs. 28% average). That said, most of the group does see a role for the EU in certain policy areas, including foreign policy, migration, the environment, energy, consumer protection, and the economy.

Most disillusioned sceptics are against further enlargement (66%, vs. 31% average) and the accession of current candidate countries. They are also mainly opposed to those countries being able to access benefits of EU membership during the accession process.

Geographically, the proportion of disillusioned sceptics is higher than average in much of the **West of Europe**, including Austria (33%), France (31%), Luxembourg (31%), Belgium (27%) and the Netherlands (25%), as well as in Czechia (32%), Slovakia (25%) and Finland (27%). Proportions of this group are lowest in Romania (11%), Portugal (12%) and Lithuania (12%).

Disillusioned sceptics are significantly more likely than average to consider **migration and border control** as the most important issue for the future of Europe (55% vs. 37% on average). They are also slightly more likely to prioritise **the fight against crime/terrorism** (33% vs. 26% on average).

In socio-demographic terms, disillusioned sceptics tend to be **older** (almost half are aged 55 or over), and more than half (52%) report **facing financial difficulties**, in common with group 3. They are also more likely than average to hold **right/centre-right political values** (27% vs. 19% on average) or **centrist values** (31% vs. 27% on average).

In view of the above, centre-right strategies targeting this group should focus on addressing their key concerns and demonstrating tangible benefits of EU membership. In particular, policymakers should address the complementarity of EU and national level decision-making powers, while emphasising the importance of national sovereignty, effective migration management and secure external borders.

7.5 Group 5: 'Hardline sceptics'

Hardline sceptics make up a small yet significant 7% of the EU population. They are distinguished by their staunchly negative views of the EU and its future. Indeed, almost all of them say they are either sceptical of or fundamentally opposed to the very idea of the EU (71% vs. 6% on average) and 81% favour its dissolution (vs. 7% on average). More than two-thirds of the group (69%) believe their countries have not benefitted *at all* from EU membership (vs. 8% average), with a further 25% saying any benefit has been limited.

By extension, hardline sceptics are firmly against further EU enlargement (81% vs. 31% on average) and strongly oppose current candidate countries being allowed to join the EU or access pre-accession benefits.

More so than even group 4, hardline sceptics prioritise **migration and border control** (66% vs. 37% average) and **the fight against crime/terrorism** (37% vs. 26% average) as the issues that are most important for the future of Europe.

Geographically, the proportion of hardline sceptics is highest in Czechia (16%), Austria (9%), Sweden (9%), Bulgaria (9%) and France (9%), and lower than average in most of the North of Europe, including in Lithuania (3%), Estonia (3%), Latvia (4%), Ireland (4%) and Finland (6%). It is also lower than average in Malta (2%), Portugal (2%), Luxembourg (2%), Romania (3%), Cyprus (4%), Hungary (4%), and Spain (4%).

The hardline sceptics group is much more likely than other segments to be **middle-aged** (i.e. 40-54) (34% vs. the average of 26%) and, like group 4, also includes a relatively high proportion of people aged 55-64 (21% vs 17% on average). Of all the segments, the group contains the highest proportion of members with a **low level of education** (12% vs. 8% on average), **living in rural areas** (30% vs. 24% on average) and **experiencing difficulties managing financially** (61% vs. 45% on average). A substantial proportion of hardline sceptics hold **right or centre-right political views** (45% vs. 19% on average).

Hardline sceptics pose a significant challenge for the European centre-right's policy on EU enlargement and deepening. Any attempts to engage with this group should consider meeting them on common ground by mainlining on commitments to promote economic stability, ensure effective migration management and border control, reinforce security measures, and advocate for transparent EU reform.

8 CONCLUSIONS

The European Union stands at a critical juncture as it grapples with the complex and intertwined challenges of deepening integration and expanding membership. The recent decision by the European Council to open accession negotiations with Ukraine and Moldova² has reignited the debate on the future direction and identity of the EU. To bring the public voice to this debate, the Wilfried Martens Centre for European Studies commissioned Ipsos to conduct this comprehensive EU-27-wide survey exploring views and preferences on key dimensions of enlargement and deepening.

The research unveiled a varied range of insights and nuanced perspectives. At the most general level, the respondents felt a clear sense of identification with Europe (albeit most identified more strongly with their country and/or local area). Their top concerns for the future of Europe revolved around the bloc's security and peace, the economy, climate change, migration, and democracy/rule of law. These findings underscore the urgency of addressing security concerns and enhancing efforts to highlight the EU's role in actively fostering security and stability, both within its borders and for candidate countries.

Additionally, the findings showed that, while the EU was mostly viewed favourably – and membership was seen to have delivered tangible benefits – dissatisfaction prevailed regarding its current functioning. There was a clear desire for change in the power balance between the EU and Member States, with a combined majority of respondents advocating for either an enhancement or a reduction in EU-level decision-making. Furthermore, the challenge of differentiated integration was reflected in the mixed support for a single-speed Europe and the diverse preferences on governance levels for different policy areas. These complexities underscore the difficulty of achieving a coherent and unified vision for deeper integration while accommodating national autonomy.

On the key question of EU enlargement, views on past rounds were mixed, with sentiment ranging from largely positive for the Austria, Finland and Sweden round, to lukewarm for the Bulgaria and Romania round (and, indeed, sentiment varied further by Member State). Views on *future* enlargement were equally divided, with support varying greatly depending on the candidate countries in question. Ukraine's potential accession found majority support in Northern Europe but faced opposition in other parts, particularly Austria. Moldova's potential accession achieved majority support only in bordering Romania and the Baltic countries, while the Western Balkans' and Turkey's potential accessions found favour only in Romania. Georgia's potential accession meanwhile lacked majority support in *any* Member State. The potential accession of Armenia and Belarus similarly met with more opposition than support and, indeed, opposition rose to a majority level for Belarus.

There was significant concern about specific potential negative impacts of candidate countries joining the EU, particularly as regards the security and economies of both the EU and individual Member States. This suggests that for any future enlargement it will be crucial to emphasise the potential benefits new members can bring, especially in terms of enhanced security and positive economic ripple effects (the latter message will be especially important in Member States with heightened financial concerns). Equally, the survey underscored the importance of ensuring candidate countries have stable democratic institutions, strong economies and are capable of adhering to EU rules and standards. It further revealed that support for enlargement could be strengthened if the process was more effectively promoted as a means of bringing peace and stability to candidate countries, enhanced EU defence, and business opportunities.

Views were mixed on candidate countries being able to access benefits of EU membership during accession. While there was an openness to them receiving policy advice from the EU and being able to trade freely with Member States, greater ambivalence was apparent in relation to their accessing work,

² On 14 December 2023, the European Council decided to open accession negotiations with Ukraine and Moldova. Accession negotiations officially opened on 25 June 2024 for both countries.

or visitor permits for their citizens, or receiving financial or military support. These findings emphasise the need for a clear articulation of the rationale for candidate countries accessing benefits of EU membership during accession, in tandem with efforts to address concerns about potential misuse or negative impacts. A similar level of reassurance will likely be required in relation to new member countries being granted right of veto in the Council of the European Union, with the survey indicating that respondents leaned more towards opposing than supporting this power.

Regarding the decision-making process on EU enlargement, the survey found support for a move away from the current unanimity requirement towards a large majority (or qualified majority) voting approach. At the same time, there was a clear appetite, not only for more information from the EU about the benefits and risks of enlargement, but for greater citizen involvement in the decision-making process, principally via public votes or referenda.

Overall, the survey confirmed that while the European project continues to enjoy broad backing, the path ahead is complex, marked by divergent public preferences on the pace and nature of further deepening and enlargement. Citizen participation will be instrumental in shaping a Union that reflects the diverse needs and aspirations of its Member States, thereby strengthening its legitimacy and effectiveness. The Martens Centre stands as a vital platform for advancing this conversation, fostering a more inclusive and participatory EU that is truly representative of its citizens.

9 ANNEX 1 – FINAL QUESTIONNAIRE

9.1 Screener

QUOTA

Age, gender, region and soft quota on Urbanity

BACKGROUND

PROG: create hidden variable ‘Country’:

- 1 Austria
- 2 Belgium (Dutch and French)
- 3 Bulgaria
- 4 Croatia
- 5 Cyprus
- 6 Czechia
- 7 Denmark
- 8 Estonia (Estonian and Russian)
- 9 Finland (Finnish and Swedish)
- 10 France
- 11 Germany
- 12 Greece
- 13 Hungary
- 14 Ireland
- 15 Italy
- 16 Latvia (Latvian and Russian)
- 17 Lithuania
- 18 Luxembourg (French, German, Luxembourgish)
- 19 Malta (Maltese and English master with local education)
- 20 Netherlands
- 21 Poland
- 22 Portugal
- 23 Romania
- 24 Slovakia
- 25 Slovenia

26 Spain

27 Sweden

Base: IF COUNTRY=2, 8, 9, 16, 18, 19

LANG. [S]

Please select in which language you want to fill in the survey:

1. Nederlands [PROG: IF COUNTRY=2]
2. Français [PROG: IF COUNTRY=2 or 18]
3. Estonian [PROG: IF COUNTRY=8]
4. Latvian [PROG: IF COUNTRY=16]
5. Russian [PROG: IF COUNTRY=8 or 16]
6. Maltese [PROG: IF COUNTRY=19]
7. English [PROG: IF COUNTRY=19]
8. German [PROG: IF COUNTRY=18]
9. Luxembourgish [PROG: IF COUNTRY=18]
10. Finnish [PROG: IF COUNTRY=9]
11. Swedish [PROG: IF COUNTRY=9]

Introduction and consent text

Welcome!

Thank you for your interest in this survey. Ipsos is running the survey to help our client understand what people like you think about important issues currently affecting [Scripter: insert Country] and other European countries. The survey will take about 20 minutes to complete.

Please read all the information and answer the questions carefully. There are no right or wrong answers to questions asked in the survey. It is your honest opinion that matters to us.

As part of the survey, we will ask you some questions related to your political views. Rest assured that a "Prefer not to answer/say" option will always be available for you to select at your discretion. Your answers throughout this survey will be kept **confidential**. No third party will receive any information that would allow you to be identified. Your responses will be grouped together with the responses provided by all participants and your personal data will be held for not longer than 12 months. Your answers will be used strictly for research purposes.

Participation in the survey is **voluntary** and you may withdraw consent at any time by contacting the support team and quoting study [24-003449-01]. Before agreeing, please also do read this information sheet [hyperlink to information sheet screen].

By agreeing to take part in this survey, **you confirm that:**

- You have read the information about the survey (please click [here](#) [insert hyperlink to information screen] to read the information sheet).
- You are taking part in this survey by your own free will.

Do you agree to participate given the above conditions?

1. Yes, I have read the information above and agree to take part in the survey.
2. No, I do not accept. [\[screen out\]](#)

Information sheet

[Scripter: This is a separate sheet that opens when the hyperlink on the previous page is clicked]

Purpose of the survey

The purpose of this survey, being conducted by Ipsos on behalf of a European client, is to better understand the attitudes and preferences of European citizens on key social and political issues of the day.

There are no anticipated physical or psychological risks involved in taking this survey.

What is Ipsos' legal basis for processing your personal data?

Ipsos requires a legal basis to process any personal data collected from you. Ipsos' legal basis for processing is your consent to take part in this research. If you wish to withdraw your consent at any time, please contact the support team and quote study 24-003449-01.

Confidentiality of collected data

Responses from all respondents will be combined and no individual responses will be identified in any research reports. The organisation for which Ipsos is running the study will only have access to anonymous research data.

How will Ipsos ensure my personal information is secure?

Ipsos takes its information security responsibilities seriously and applies various precautions to ensure your information is protected from loss, theft or misuse. Security precautions include appropriate physical security of offices and controlled and limited access to computer systems. Access to the data collected will be strictly limited to Ipsos personnel assigned to work on the research project.

Voluntary participation

Participation in this survey is voluntary. You can end the survey at any time by closing your browser window. If you do not complete the survey, none of your answers will be used in the analysis of survey responses.

Contact information

If you have specific questions regarding this project, as well as for usual Ipsos panel participation questions and technical troubleshooting, you may contact the panel support team and reference study [24-003449-01].

Base: All

[Standard Screener: DO NOT MODIFY OR TRANSLATE]

D1. YEAR/MONTH. What is your date of birth?

YEAR

_1910 1910

...

_2015 2015

MONTH

_1 January

_2 February

_3 March

_4 April

_5 May

_6 June

_7 July

_8 August

_9 September

_10 October

_11 November

_12 December

[Standard Screener: DO NOT MODIFY OR TRANSLATE]

QUOTAGERANGE [Hidden]. Hidden Question - QUOTAGERANGE "this is a dummy question that will hold age breaks" for the quotas that should be defined by the PM; it CAN be edited and lines can be added to meet survey objectives.

_18_24 "18-24",

_25_34 "25-34",

_35_44 "35-44"

_45_54 "45-54"

_55_64 "55-64"

_65_99 ">64"

Scripter: add recode age_quota:

1. 18 - 24 years
2. 25 - 39 years
3. 40 - 54 years
4. 55 years and older

[TERMINATE IF LESS THAN 18]

[Standard Screener: DO NOT MODIFY OR TRANSLATE]

RESP_AGE [Hidden]. Hidden Question - RESP_AGE "this is a dummy question that will hold age"

USE RESP_AGE [Hidden] response list
[Standard Screener: DO NOT MODIFY OR TRANSLATE]

Base: All

GENDER_NONBINARY_. Are you...?

- _1 Male
- _2 Female
- _3 Other
- _4 Prefer not to answer

Scripter: if GENDER_NONBINARY = 3 or 4, allocate to least filled category 1 or 2 for quota setting

Base: All (hidden)

PROG: recode answer from GENDER_NONBINARY into below categories for D1

D2. [S]

Gender. Are you...?

1. Male
2. Female
3. Non-binary
4. Prefer not to say

Base: All respondents

D3. [S]

In which region do you live?

1	Austria	IIS standard screener - ATREGION3
2	Belgium	IIS standard screener - BEregion2
3	Bulgaria	See excel Region
4	Croatia	IIS standard screener - HRREGION1 (quota on 4 regions see excel)
5	Cyprus	See excel Region
6	Czechia	IIS standard screener - CZREGION1
7	Denmark	IIS standard screener - DKREGION1
8	Estonia	See excel Region
9	Finland	IIS standard screener - FIREGION1
10	France	IIS standard screener - FRREGION5
11	Germany	IIS standard screener - GERREGION1
12	Greece	IIS standard screener - GRREGION1
13	Hungary	IIS standard screener - HU02REGION1
14	Ireland	See excel Region
15	Italy	IIS standard screener - ITSTDREGION
16	Latvia	IIS standard screener - NUTS3 from LVCODE
17	Lithuania	See excel Region
18	Luxembourg	See excel Region
19	Malta	See excel Region

20	Netherlands	IIS standard screener - NLPROVINCIE
21	Poland	IIS standard screener - PLREGION1
22	Portugal	IIS standard screener - PTREGION1
23	Romania	IIS standard screener - ROREGION2
24	Slovakia	See excel Region
25	Slovenia	See excel Region
26	Spain	IIS standard screener - ESREGION2
27	Sweden	IIS standard screener - SEREGION2

999. Prefer not to say [hidden]

Scripter: if D3=999: screenout

Base: All respondents

D4. [S]

Would you say that you live in a..?

1. Rural area or village
2. Small or medium size town
3. Large town or city
98. Don't know [hidden]

9.2 Main questionnaire

GENERAL QUESTIONS ON EUROPE AND THE IDEA OF EUROPE

Base: all respondents

Q1 [SGRID] People have different views about themselves and how they relate to the world. To what extent, if at all, do you identify with:

Rows:

1. The city/town/village where you live
2. The country in which you live
3. Europe as a whole

Columns:

1. To a great extent
2. To some extent
3. Hardly at all
4. Not at all
98. Don't know

Base: all respondents

Q2. [M, max 3 answers, randomise order of items 1-10]

Which of the following issues do you think are the most important for the future of Europe?
Please select up to 3 answers.

1. The economy, jobs and tackling poverty
2. Climate change and the environment
3. The availability and quality of public services, like education and healthcare
4. Democracy, values, rights and rule of law
5. The availability, quality or affordability of housing
6. Europe's security and peace

7. Migration and border control
8. The fight against crime/terrorism
9. Digital transformation of the economy and of society
10. The EU's influence in the world
11. None of these (single answer)
98. Don't know/no opinion (single answer)

PREAMBLE: Now a few questions about the European Union (the EU).

Base: all respondents

Q3 [M, max 4 answers]

What, if anything, does the European Union (the EU) mean to you personally? From the list below, please select the phrases that most represent the EU to you.
Please select up to four answers only.

RANDOMISE ROWS 1-19

1. Unity among member countries
2. Economic prosperity
3. A world power
4. The euro/single currency
5. Free trade/single market
6. Peace and stability/security
7. Values like freedom, human rights and equality/tolerance of diversity
8. Justice and the rule of law
9. Troubled economy/unemployment
10. Rules and regulations
11. Waste of money
12. Loss of our cultural identity
13. More crime/terrorism
14. Freedom to travel/go on holidays/move about easily in the EU
15. Uncontrolled immigration/poor border control
16. Diversity of languages/cultures
17. Shared heritage/history
18. EU institutions (e.g. the European Parliament and/or the European Commission)
19. Conflict between countries
20. Something else (open end box)
21. The EU doesn't mean anything to me (single answer)
98. Don't know/no opinion (single answer)

Base: all respondents

Q4 [S] How much, if anything, do you feel you understand about the European Union (the EU)?

1. A great deal
2. A fair amount
3. Not very much
4. Nothing at all
98. Don't know

Base: all respondents

Q5. [S] Taking everything into account, how much, if at all, would you say that [country] has benefitted from being a member of the European Union (EU)?

1. A great deal
2. A fair amount
3. Not very much
4. Not at all
98. Don't know/no opinion

99. Prefer not to say

Base: all respondents

Q6. [S] Which of the following statements regarding the European Union (EU) is closest to your opinion?

1. I am in favour of the European Union and the way it is working at present
 2. I am rather in favour of the European Union, but not the way it is working at present
 3. I am rather sceptical of the European Union, but could change my opinion if the way it works really changed
 4. I am opposed to the idea of the European Union in general
98. Don't know/no opinion
99. Prefer not to answer

Base: all respondents

Q7. [S] Over the last five years, would you say that the image you have of the European Union (EU) has improved, got worse or stayed about the same?

1. Improved
 2. Stayed about the same
 3. Got worse
98. Don't know/I don't have any image of the EU
99. Prefer not to say

Base: all respondents

Q8. [S] Would you say that you are very optimistic, fairly optimistic, fairly pessimistic or very pessimistic about the future of the European Union (EU)?

1. Very optimistic
 2. Fairly optimistic
 3. Fairly pessimistic
 4. Very pessimistic
98. Don't know/no opinion
99. Prefer not to say

Base: all respondents

Q9. [S] Which of the following most closely reflects your view of how the European Union (EU) should look by 2030?

By 2030...

1. I would like there to be a single European government
 2. I would like to see more decisions being taken at the EU level, instead of at the individual country level
 3. I would like the EU to have about the same level of power that it does today
 4. I would like to see fewer decisions being taken at the EU level and more at the country and/or local level
 5. I would like there to no longer be a European Union (EU)
98. Don't know/no opinion
99. Prefer not to say

Base: IF Q9=1 , 2, 3

Q10. [S]

IF Q9=1 or 2: Which of the following best reflects your view on the way in which current EU member countries should go about increasing their cooperation on issues affecting Europe?

IF Q9=3: Some current EU member countries would like to increase their cooperation. Which of the following statements best reflects your view on how these countries should go about increasing their cooperation on issues affecting Europe?

1. All EU member countries should increase their cooperation at the same pace
2. All EU member countries should increase their cooperation at the same pace, but be able to opt out of decisions they disagree with
3. Individual member countries should be able to choose when to increase their cooperation based on their individual circumstances
4. They should not increase their cooperation
98. Don't know/I am uncertain about my preference
99. Prefer not to say

Base: all respondents

Q11. [SGRID] In your opinion, which level is best placed to deal with each of the following areas?

Rows (randomize):

1. Migration and refugees
2. Environment and climate change
3. Foreign policy, security and defence
4. Energy policy
5. Consumer protection
6. Agriculture and fisheries
7. Economy, trade and growth
8. Employment and social security
9. Healthcare

Columns:

1. The EU only
2. Mainly the EU
3. Equally the EU and member countries
4. Mainly the member countries
5. The member countries only
98. Don't know/no opinion
99. Prefer not to say

Base: all respondents

Q12. [S] As you may know, Brexit (the United Kingdom's departure from the EU) happened in 2020. In your opinion, was Brexit a good thing or a bad thing for the EU?

1. Entirely good
2. Mainly good
3. Both good and bad
4. Mainly bad
5. Entirely bad
98. Don't know/no opinion
99. Prefer not to say

Base: IF Q12=1 or 2

Q13. [M, randomise rows] You said you believe that Brexit was an entirely or mainly good thing. Why do you feel this way?

Please select all that apply.

1. Means there is more money for the other member countries to share
2. Has created increased unity and solidarity among the other EU member countries

3. Has made it easier for the other EU countries to reach agreement on issues/decisions
4. Has enabled the EU to have greater control over immigration and border control
5. Has helped to promote economic growth within the EU
6. Has made other countries want to leave too, threatening the future of the EU
7. Has led to improvement in the EU's consumer, social and/or environmental standards
8. The UK is too different from the rest of the EU/ didn't feel like part of the EU
9. Resulted in [COUNTRY] having more influence in EU decisions
10. Something else
11. None of the above (single answer)
98. Don't know (single answer)
99. Prefer not to say (single answer)

Base: IF Q12=4,5

Q14. [M, randomise rows] You said you believe that Brexit was mainly or entirely a bad thing. Why do you feel this way?

Please select all that apply.

1. Has led to economic uncertainty and financial instability in the EU
2. Has led to a loss of UK contributions to EU budget/less money to go around
3. Resulted in increased taxation or duties on goods from the UK
4. Has made other countries want to leave too, threatening the future of the EU
5. Increased feelings of insecurity/political instability in the EU
6. Contributed to increased immigration to [COUNTRY]
7. Has made it more difficult to study in the UK [HIDE FOR IRELAND]
8. Has made it more difficult to live or work in the UK [HIDE FOR IRELAND]
9. Has made it more difficult for British people to work in the EU
10. Has made it more difficult/more expensive to travel to the UK
11. Has led to reduced trade between UK and EU companies
12. Something else
13. None of the above (single answer)
98. Don't know (single answer)
99. Prefer not to say (single answer)

ATTITUDES TOWARDS ENLARGEMENT AND DEEPENING OF THE EU

PREAMBLE: When the European Union (previously called the European Economic Community, or EEC) was first formed, it included six member countries - Belgium, France, Italy, Luxembourg, the Netherlands and West Germany. Over time, new groups of countries have joined the EU, most recently:

- Austria, Finland and Sweden in 1995;
- Czechia, Cyprus, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia and Slovenia in 2004;
- Bulgaria and Romania in 2007;
- Croatia in 2013.

Base: all respondents

Q15. [SGRID] Do you feel that these groups of countries joining the European Union (EU) was generally a good or a bad thing for the EU?

If you feel unsure about this, or have mixed feelings, please try to provide your best assessment based on any impressions you do have.

Rows (randomize):

1. Austria, Finland and Sweden
2. Czechia, Cyprus, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia and Slovenia
3. Bulgaria and Romania
4. Croatia

Columns:

1. Entirely good
2. Mainly good
3. Both good and bad
4. Mainly bad
5. Entirely bad
98. Don't know/no opinion
99. Prefer not to say

Base: IF Q15=1 or 2 on any row

Q16. [M, randomise rows] You said you believe that **[randomly show one row where Q15=1 or 2]** joining the EU was an entirely or mainly good thing. Why do you feel this way? Please select all that apply.

If you feel you do not know enough about this to be able to answer, please provide your best assessment based on any impressions you do have.

1. Improved safety/security in the EU
2. Strengthened the EU's influence in the world
3. Promoted democracy and strengthened the protection of human rights in the EU
4. Brought more security and political stability to **[SCRIPTER: if Q15=1 or 2 on row 4 only, show "that country"; if Q15=1 or 2 on any other row, show "those countries"]**
5. Helped to reduce crime and illegal immigration in the EU
6. Made it easier for people to move and travel to/from **[SCRIPTER: if Q15=1 or 2 on row 4 only, show "that country"; if Q15=1 or 2 on any other row, show "those countries"]**
7. Provided good business opportunities and led to economic growth and modernisation in **[SCRIPTER: if Q15=1 or 2 on row 4 only, show "that country"; if Q15=1 or 2 on any other row, show "those countries"]**
8. Provided good business opportunities/trade and led to economic growth and modernisation in other EU countries
9. Brought higher consumer, social and/or environmental standards to **[SCRIPTER: if Q15=1 or 2 on row 4 only, show "that country"; if Q15=1 or 2 on any other row, show "those countries"]**
10. Something else
11. None of the above **(single answer)**
98. Don't know **(single answer)**
99. Prefer not to say **(single answer)**

Base: IF previous Q=4,5 on any row

Q17. [M, randomise rows] You said you believe that **[randomly show one row where Q=4,5]** joining the EU was mainly or entirely a bad thing. Why do you feel this way? Please select all that apply.

If you feel you do not know enough about this to be able to answer, please provide your best assessment based on any impressions you do have.

1. Led to job losses in **[country]**
2. Lowered social standards or welfare systems in the EU
3. The country/countries required a lot of financial support from the EU to modernise
4. Made the EU more complex and difficult to manage
5. Reduced the EU's influence in the world
6. Increased feelings of insecurity/political instability in the EU
7. Contributed to more uncontrolled immigration and poor border control
8. Caused economic imbalances within the EU
9. Meant less EU money/funding was available to support **[country]**

10. Increased cultural and language differences within the EU
11. Resulted in [country] having less influence in EU decisions
12. Something else
13. None of the above (single answer)
98. Don't know (single answer)
99. Prefer not to say (single answer)

PREAMBLE: Currently, countries that are not members of the European Union (EU) can apply to join if they meet certain criteria.

Base: all respondents

Q18. [S] In general, do you think that the European Union (EU) should or should not be looking to add more member countries at this moment?

1. Should
2. I am indifferent/have no opinion
3. Should not
98. Don't know
99. Prefer not to say

PREAMBLE: The following countries have applied to join the EU:

- The Western Balkan countries (i.e. Albania, Bosnia and Herzegovina, Montenegro, Kosovo, North Macedonia, Serbia)
- Ukraine
- Turkey
- Georgia
- Moldova

Base: all respondents

Q19. [SGRID] In your opinion, should these countries be allowed to join the EU, when they are ready?

Rows (Randomise order):

1. The Western Balkan countries (i.e. Albania, Bosnia and Herzegovina, Montenegro, Kosovo, North Macedonia, Serbia)
2. Ukraine
3. Turkey
4. Georgia
5. Moldova

Columns:

1. Should be allowed to join the EU
2. I am indifferent
3. Should not be allowed to join the EU
98. Don't know
99. Prefer not to say

SCRIPTING INSTRUCTION: RANDOMLY ASK (PER COUNTRY) ONLY 2 OUT OF THE 5 FOLLOWING QUESTIONS Q20-21-22-23-24 PER RESPONDENT

Base: SPLIT SAMPLE

Q20. [SGRID] In your opinion, what impact would the Western Balkan countries joining the EU have on...?

By Western Balkan countries, we mean Albania, Bosnia and Herzegovina, Montenegro, Kosovo, North Macedonia, Serbia.

Rows (Randomise order):

1. The EU's security
2. How efficiently the EU works
3. The EU's economy
4. [Country]'s political power in the EU
5. [Country]'s economy
6. [Country]'s security

Columns:

1. A large positive impact
2. A small positive impact
3. Neither a positive nor a negative impact
4. A small negative impact
5. A large negative impact
6. No impact at all
98. Don't know
99. Prefer not to say

Base: SPLIT SAMPLE

Q21. [SGRID] In your opinion, what impact would Ukraine joining the EU have on...?

Rows (Randomise order):

1. The EU's security
2. The EU's economy
3. [Country]'s political power in the EU
4. [Country]'s economy
5. [Country]'s security
6. How efficiently the EU works

Columns:

1. A large positive impact
2. A small positive impact
3. Neither a positive nor a negative impact
4. A small negative impact
5. A large negative impact
6. No impact at all
98. Don't know
99. Prefer not to say

Base: SPLIT SAMPLE

Q22. [SGRID] In your opinion, what impact would Turkey joining the EU have on...?

Rows (Randomise order):

1. The EU's security
2. The EU's economy
3. [Country]'s political power in the EU
4. [Country]'s economy
5. [Country]'s security

6. How efficiently the EU works

Columns:

1. A large positive impact
2. A small positive impact
3. Neither a positive nor a negative impact
4. A small negative impact
5. A large negative impact
6. No impact at all
98. Don't know
99. Prefer not to say

Base: SPLIT SAMPLE

Q23. [SGRID] In your opinion, what impact would Moldova joining the EU have on...?

Rows (Randomise order):

1. The EU's security
2. The EU's economy
3. [Country]'s political power in the EU
4. [Country]'s economy
5. [Country]'s security
6. How efficiently the EU works

Columns:

1. A large positive impact
2. A small positive impact
3. Neither a positive nor a negative impact
4. A small negative impact
5. A large negative impact
6. No impact at all
98. Don't know
99. Prefer not to say

Base: SPLIT SAMPLE

Q24. [SGRID] In your opinion, what impact would Georgia joining the EU have on...?

Rows (Randomise order):

1. The EU's security
2. The EU's economy
3. [Country]'s political power in the EU
4. [Country]'s economy
5. [Country]'s security
6. How efficiently the EU works

Columns:

1. A large positive impact
2. A small positive impact
3. Neither a positive nor a negative impact
4. A small negative impact
5. A large negative impact
6. No impact at all
98. Don't know
99. Prefer not to say

SCRIPTING INSTRUCTION: END OF SPLIT SAMPLE SECTION.

PREAMBLE: Further in the future, other countries that may wish to apply to join the EU are Belarus and Armenia.

Base: all respondents

Q25. [SGRID] In your opinion, should these countries be allowed to join the EU, when they are ready?

Rows (Randomise order):

1. Armenia
2. Belarus

Columns:

1. Should be allowed to join the EU
2. I am indifferent
3. Should not be allowed to join the EU
98. Don't know/no opinion
99. Prefer not to say

Base: all respondents

Q26. [SGRID] In your opinion, how important, if at all, should each of the following be when deciding if a country should be allowed to join the EU?

That the country....

Rows (Randomise order):

1. Is part of the European continent
2. Shares the same Judeo-Christian heritage/roots as current EU countries
3. Is a member of NATO (The North Atlantic Treaty Organization)
4. Has stable political institutions that support democracy, justice and the rule of law
5. Is committed to gender equality and protecting minority groups
6. Is fully able to follow EU rules, standards and laws
7. Has a strong, resilient economy
8. Can help strengthen the EU's influence in the world

Columns:

1. Essential
2. Very important
3. Fairly important
4. Not very important
5. Not at all important
98. Don't know/no opinion (single answer)
99. Prefer not to say (single answer)

ATTITUDES TOWARDS THE ACCESSION PROCESS AND DECISION-MAKING

PREAMBLE: Countries that have formally applied for EU membership and that are considered possibly suitable by the EU are called 'candidate countries'. In some circumstances, candidate countries can already start to access certain benefits associated with the EU, before officially joining.

Base: all respondents

Q27. [SGRID] Do you agree or disagree that candidate countries should be able to start accessing the following types of benefits while waiting for their full EU membership to be approved?

Please select your level of agreement for each statement separately.

Rows (randomise order):

1. The ability to trade freely with the EU

2. Access to EU work permits for their citizens
3. Access to EU funds, such as funds for regional development, education and training
4. Permission for their citizens to visit EU countries without a passport
5. Detailed policy advice and expertise from the EU
6. Military support from EU member countries (if the candidate country is attacked or invaded)

Columns:

1. Strongly agree
2. Tend to agree
3. Neither agree nor disagree
4. Tend to disagree
5. Strongly disagree
98. Don't know
99. Prefer not to say

Base: all respondents

Q28. [SGRID] Would you be more or less likely to support candidate countries becoming members of the EU if you knew this would mean...?

Rows (randomise order):

1. More business opportunities would be created in [COUNTRY]
2. Less money would be available for farmers/agriculture in [COUNTRY]
3. An increase in the amount of money [COUNTRY] has to contribute to the EU budget
4. [COUNTRY]'s military would have to help defend the new member countries in the event of a military attack
5. Defence in the EU would be stronger
6. Greater peace, security and political stability in the candidate countries
7. Higher social, environmental and consumer standards in the candidate countries

Columns:

1. A lot more likely
2. A little more likely
3. Would make no difference
4. A little less likely
5. A lot less likely
98. Don't know
99. Prefer not to say

PREAMBLE: On some issues, individual EU member countries can block decisions taken by the EU.

Base: all respondents

Q29. [SGRID] If these candidate countries are allowed to join the EU, to what extent would you support or oppose them then being able to block decisions taken by the EU on matters relating to...?

Rows (randomise order):

1. Further new countries joining the EU
2. EU taxation
3. The EU budget
4. Defence and foreign policy matters (e.g. international sanctions)
5. Social security matters
6. Police cooperation matters
7. Changes to EU laws

Columns:

1. Strongly oppose
2. Tend to oppose
3. Neither support nor oppose
4. Tend to support
5. Strongly support
98. Don't know/no opinion
99. Prefer not to say

PREAMBLE: All current EU member countries have a say on whether candidate countries can join the EU. A candidate country is only allowed to join if all of the current EU member countries support this.

As a reminder, candidate countries are countries that have formally applied for EU membership and that are considered possibly suitable by the EU.

Base: all respondents

Q30. [SGRID] To what extent would you support or oppose a different approach, where a candidate country can join the EU if...

Rows (randomise order):

1. A small majority (51%) of the current EU member countries are in favour
2. A large majority (75%) of the current EU member countries are in favour

Columns:

1. Strongly support
2. Tend to support
3. Neither support nor oppose
4. Tend to oppose
5. Strongly oppose
98. Don't know
99. Prefer not to say

Base: all respondents

Q31. [S] To what extent do you agree or disagree that EU citizens themselves should have a more direct say on which countries are allowed to join the EU?

1. Strongly agree
2. Tend to agree
3. Neither agree nor disagree
4. Tend to disagree
5. Strongly disagree
98. Don't know
99. Prefer not to say

Base: if Q31=1,2, 3

Q32. [S] Which, if any, of the following would be the best way to let EU citizens have a more direct say on which countries should be able to join the EU?

1. A public vote/referendum
2. Regular polls/surveys
3. A citizen's assembly (a representative group of citizens selected to discuss the issue in depth and arrive at a view)
4. A public consultation conducted via post or online
5. Another way (open end box)
6. None of the above
98. Don't know
99. Prefer not to say

Base: all respondents

Q33. [S] To what extent do you agree or disagree that you would like to receive more information from the EU on the benefits and risks of new countries joining the EU?

1. Strongly agree
2. Tend to agree
3. Neither agree nor disagree
4. Tend to disagree
5. Strongly disagree
98. Don't know
99. Prefer not to say

9.3 Other socio-demographics

Base: all respondents

To finish off, a few background questions about you, to help us look at how views vary among different groups of people.

Q34. [S] What is the highest level of education you have successfully completed (usually by obtaining a certificate or diploma)?

SCRIPTER: insert country-specific list Excel 'Education'

Scripter: add recode into ISCED and ISCED2

997. Don't know/prefer not to say

Base: all respondents

Q35. [S] Which of the following best describes your current employment status?

1. Employed full time
2. Employed part time
3. Self employed
4. Unemployed but looking for a job
5. Unemployed and not looking for a job / long-term sick/ disabled
6. Homemaker/looking after the home
7. Student/pupil (full-time)
8. Retired
9. Other
98. Prefer not to say

Scripter: recode Q35 into Occupation:

1. Employed IF Q35 = 1, 2 OR 3
2. Unemployed IF Q35 = 4
3. Inactive IF Q35 = 5, 6, 7 or 8 or 9
4. Unknown IF Q35 = 98

Base: all respondents

Q36 [SGRID] To what extent are you in favour of or opposed to the following? Please answer using a scale from 0 to 10 – where '0' means that you are "fully opposed" and '10' means that you are "fully in favour".

Rows (randomize):

1. State intervention in [Country]'s economy
2. The redistribution of wealth from the rich to the poor in [Country]
3. Same-sex marriage
4. Protecting the privacy of individuals even if it hinders efforts to combat crime
5. A strict immigration policy in [Country]
6. Prioritising environmental protection even at the expense of economic growth in [Country]

Columns:

0. 0 – Fully opposed
1. 1
2. 2
3. 3
4. 4
5. 5 – No feelings either way
6. 6
7. 7
8. 8
9. 9
10. 10 – Fully in favour
97. Don't know

Base: all respondents

Q37. [SGRID] Which of the following best describes your voting behaviour in recent years...

Rows:

1. At national level
2. At EU level (i.e. European Parliament elections)

Columns:

1. You always vote
2. You vote most of the time
3. You occasionally vote
4. You rarely vote
5. You never vote
6. You were too young to vote before
98. Don't know
99. Prefer not to say

Base: all respondents

Q38 [Q, range 1-30] We would now like to ask you a question about other people in your household.

By household, we mean everyone who usually lives at your main place of residence (including yourself), that shares a common budget (that is, excluding flatmates and lodgers).

How many people – including children and yourself – normally live with you as members of this household?

98. Don't know (hidden)

CHECK (SOFT); SHOW IF >15; ERROR MESSAGE: You entered an unexpected value, please review your answer or continue to confirm your response.

RANGE CHECK (HARD); ERROR MESSAGE: Please enter a value between 1 and 30.

Scripter: recode Q38 into HH_size:

1. 1
2. 2
3. 3
4. 4+

5. Don't know

Base: all respondents

Q39 [S] Thinking about your household's financial situation, would you say that making ends meet every month is ...?

By household, we mean everyone who usually lives at your main place of residence (including yourself), that shares a common budget (that is, excluding flatmates and lodgers).

1. Very easy
2. Fairly easy
3. Fairly difficult
4. Very difficult
5. Don't know
98. Prefer not to say

Base: IF Supplier=lsay panels

Q40 [S] Thank you very much for taking part in this survey. In the near future, Ipsos may wish to recontact people who participated in the survey to explore in more depth some topics covered. Would you be willing to be re-contacted by Ipsos some time within the next 12 months for this follow up research? You would, of course, be free to say 'no' at the time.

1. Yes
2. No