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Dániel BARTHA
Tamás BOROS
Maria FREITAS
Gergely LAKI
Meghan STRINGER

WHAT IS THE EUROPEAN DREAM?

SURVEY ON EUROPEAN DREAMS FOR
THE FUTURE OF EUROPE

WHAT IS THE EUROPEAN DREAM?

**Survey on European Dreams
for the Future of Europe**





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for the Future of Europe

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FEPS – Foundation for European Progressive Studies

Rue Montoyer 40, 4th floor – 1000 Brussels, Belgium

T: +32 2 234 69 00

Email: info@feps-europe.eu

Website: www.feps-europe.eu



Policy Solutions

Révy utca 10 – 1065 Budapest, Hungary

T: +36 1 4 748 748

Email: info@policysolutions.eu

Website: www.policysolutions.eu

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Responsible editors:

Tamás BOROS, Policy Solutions Co-Director

Maria FREITAS, FEPS Senior Policy Advisor

Dr David RINALDI, FEPS Director of Studies and Policy

Dr Ania SKRZYPEK, FEPS Director for Research and Training

Authors: Dániel BARTHA, Tamás BOROS, Maria FREITAS, Gergely LAKI and Meg STRINGER

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INTRODUCTION

The founders of the European project were dreamers. They dreamed of a united Europe: a continent of peace, solidarity and shared prosperity. A Europe without borders and divisions that celebrates the continent's incredible diversity. A Europe evolving towards an ever-closer union, inspired by the notion that Europe will always be stronger together.

Do Europeans today share the founders' dream?

What is their view in an era where this dream is portrayed as a nightmare by eurosceptics and ultra-nationalist groups? During a time when the United Kingdom has left the European Union whilst solving big challenges from climate change to migration demands more - not less - cooperation?

What are the hopes and dreams of everyday Europeans in this complex and rapidly changing world? For themselves and their families. For their own countries and for the Union as a whole?

Together, FEPS and Policy Solutions set to find out with this landmark survey covering the 14 most populous Member States. Our research defines the European dream with clarion insights for all those engaged in tackling Europe's most pressing challenges.

As policymakers debate the Future of Europe¹ - hoping to make the Union more responsive to the views and needs of citizens - this research is especially timely.

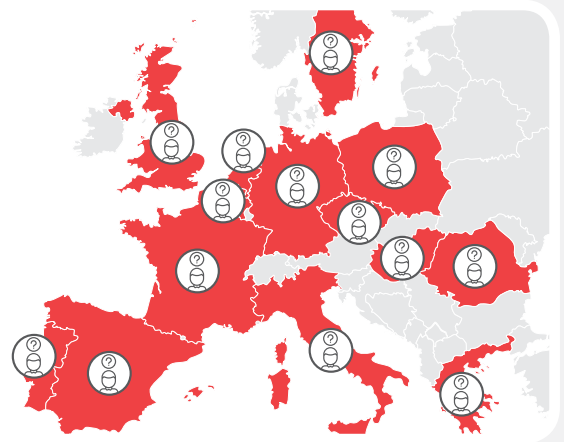
Democracy works best when everyone is heard. This survey shares the people's voice. We all need to hear it.

METHODOLOGY

Representative opinion polls were conducted by Hanbury Strategy in the 14 most populous European Member States (hereinafter the EU14) between 22 July and 8 August of 2019. The sample was 1,000 people per country, 14,000 European Union citizens altogether, who represented the whole adult population of Belgium, Czechia, France, Germany, Greece, Hungary, Italy, the Netherlands, Poland, Portugal, Romania, Spain, Sweden and the United Kingdom.

Data was weighted to match the demographic profile of the country on age and gender, region and education level. Weights were derived from the national census in each country. A margin of error of +/- 3% applies to all national-level data. A larger margin of error applies for subnational samples.

Scan this QR code to learn more about the survey results.



 = 1,000 respondents per country

Σ = 14,000 respondents in total

¹ European Commission. 2019. Shaping the Conference on the Future of Europe. [ONLINE] Available at: https://ec.europa.eu/info/strategy/future-europe_en. [Accessed 3 December 2019].



EXECUTIVE SUMMARY

Europeans showed a longing for the idea of Europe as it was three to four decades ago. A democratic Europe. A Europe of welfare states. A Europe of prosperity and opportunity for all. A stable and safe Europe. This is the European dream - unique to this continent and its history - that should inform and inspire the Future of Europe.

CHAPTER 1. DREAMS FOR THE BEST LIFE

Assessed on a global scale, our survey shows that Europe is still the best place to live. The most popular country was the respondents' own. Residents of wealthy EU14 countries were roughly twice as likely to select their own country than their poorer counterparts. The single most popular European country was Switzerland, followed by Germany and Nordic countries. Non-European countries to top the list included the United States, Canada and Australia.



CHAPTER 2. DREAMS FOR HAPPINESS

Greater financial security and free time were the keys to happiness. Although the majority chose more financial security, the relative importance of this choice appears influenced by their country's macroeconomic status. Instead of the rate of growth, living standards appear to explain citizen's level of satisfaction with their financial security. The EU14 also showed a preference for spending more free time with their families.



CHAPTER 3. DREAMS FOR FUTURE GENERATIONS

The EU14 have a surprisingly bleak view of quality of life for future generations. Only one in four believe that future generations will have a better life than their own. One third believe that quality of life will be worse. The optimists are more likely to be young, religious, pro-European Union, a resident of their country's capital and male. Citizens from founding European Union countries emerged as the most pessimistic.



CHAPTER 4. DREAMS FOR ACHIEVEMENT

The survey indicated alarmingly low faith in hard work and entrepreneurship. Instead, luck appeared to play an outsized role in making or breaking the European dream. Central and Eastern European countries with high gross domestic product (GDP) growth appear far more positive about the promise of work and entrepreneurship than Europe's historically rich economies such as Germany or the United Kingdom.





CHAPTER 5. DREAMS FOR SUPPORT

In the pursuit of their dreams, where do the EU14 look for support? A clear majority rely on themselves. Very few presume to receive help from the government and even less from trade unions, multinational companies, political parties or NGOs. Central and Eastern Europeans appeared more self-empowered than the EU14 average. Residents of capital cities tend to perceive the European Union as more important than residents of smaller municipalities.



CHAPTER 6. DREAMS FOR DEMOCRACY

The founders dreamed of a democratic Europe, united around fundamental values from freedom and dignity to equality and rule of law. Is this a dream that still resonates with the EU14? Overall, our survey shows yes. Democracy won by knockout. Solidarity and equality were also far more popular than competition and performance. Europe's family-friendly character was readily apparent. Yet the preference - however slight - for homogeneity over diversity and security over freedom are worrying trends for Europe's liberal values.



CHAPTER 7. DREAMS UNDER THREAT

The EU14 believe that climate change and migration are the biggest issues for Europe over the next 10 years, threatening their dreams for a brighter tomorrow. There was no country in our survey where climate change was not amongst the most important concerns. Whilst low levels of pay and pensions primarily concerned the Spanish and the Hungarians, growing social inequality was most worrisome to those living in Southern Europe.



CHAPTER 8. DREAMS FOR LEADERSHIP

The EU14 are highly divided on whether European institutions or national governments should determine the future of Europe. The share of those who support the European Union in a leadership role was just as high as the ratio of respondents who thought the same about their national governments. Whilst there were no decisive winners or losers, respondents did appear to agree on giving citizens greater say in political decision-making. In comparison, very few respondents wanted political parties, trade unions or NGOs to lead on their behalf.



CHAPTER 9. DREAMS FOR TAXPAYER MONEY

Where do citizens want to see their national governments invest more taxpayer money? The short answer is social policy, especially healthcare, pensions and education. There is near universal consensus in Central and Eastern European countries that their respective healthcare systems need public investment. The majority of Swedish and German citizens want their government to spend more on pensions. This shows that

even in more secure welfare states, pensions are a key concern. The issue of education and environmental protection also figured prominently.

CHAPTER 10. DREAMS FOR UNIVERSAL BASIC INCOME



The economic and political turbulence that has rocked Europe in recent years has brought the idea of establishing a taxpayer funded universal basic income (UBI) to the fore. Our poll shows that this policy has a plurality of support in the EU14. Given UBI's unpopularity in Eastern and Southern Europe, however, it is unlikely to become part of European social policy in the near future. One of every fourth respondent did not have an opinion about UBI, which suggests the public still has much to learn about this idea.

CHAPTER 11. DREAMS FOR SALARY



What is the dream salary for the EU14? It turns out that citizens in rich and poor countries answer this question very differently. No matter what, they all dream for more - about twice their minimum wage according to our survey. The average dream salary across the EU14 ranged from a net of 900 euros in Central and Eastern Europe to 2,200 euros in Western European countries. In Southern Europe, the dream net salary is between 1,200 euros and 1,800 euros per month.

CHAPTER 12. DREAMS FOR RETIREMENT AGE



Even though Europeans live longer, they hope not to work longer. On this, the EU14 are united. Their dream retirement age is 60. Even in the countries where the retirement age is already high, respondents would prefer to stop work around age 60 to 61. In countries where the retirement age is under 65, respondents would prefer to stop working before the age of 60.

CHAPTER 13. DEFINING THE EUROPEAN DREAM



Our survey reveals that the European dream is... Europe itself. Citizens do not long to move to another continent or outside the European Union. They do not want to give up their democracies or individual liberties. Rather than weaken the European welfare model, they want to strengthen it.



DREAMS FOR THE BEST LIFE

EUROPE REMAINS A DREAMLAND

When choosing where to live, a world of opportunity unlike any known in history is open to Europeans today. Which countries offer the best life according to the EU14? And why? Assessed on a global scale, our survey shows that European countries top the list and that wealth – both personally and macroeconomically – is decisive to this choice.

HIGHLIGHTS



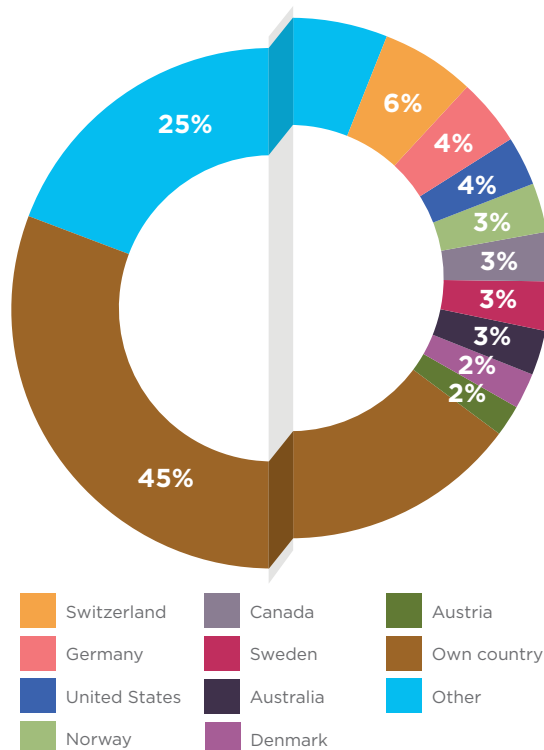
Almost every second European considers that the country where they currently live is the best for living. Residents of wealthy EU14 countries were roughly twice as likely to select their own country than their poorer counterparts.

In poorer Member States, the decisive factor to live in another country was the living standard of the countries they had chosen. Every third respondent in Greece, Poland, Portugal, Hungary and Romania said that it would be better to live in an economically more developed country than their own.

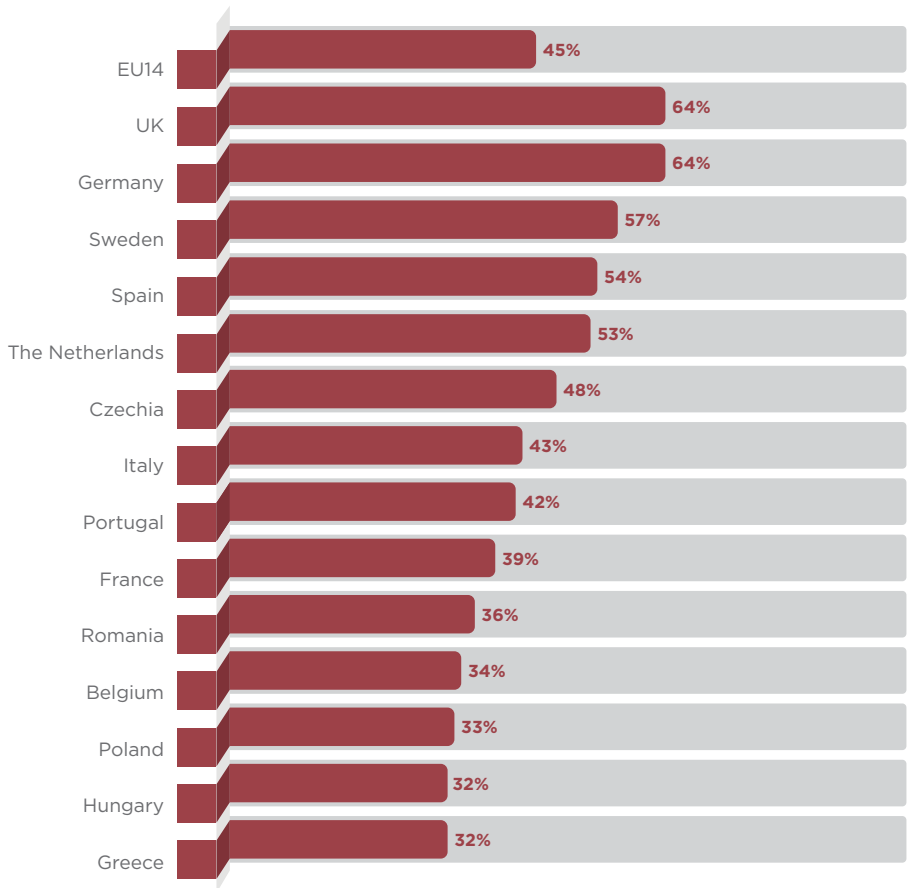
Very few would leave Europe to live in another continent, showing that Europe remains a dreamland. Switzerland is especially popular.

The non-European countries to make the top list included the United States, Canada and Australia - all of which have a shared history and culture with Europe. Other countries in Asia, Africa and Latin America did not feature at all.

Which country do you consider as the best one to live in? (EU14)



Which country do you consider as the best one to live in?
Percentage of those who chose their own country



HOME IS WHERE THE HEART IS

“Home is where the heart is.” This timeless expression appears to resonant with a significant portion of citizens. Almost every second European reported that their own country is the best to live in (45%).

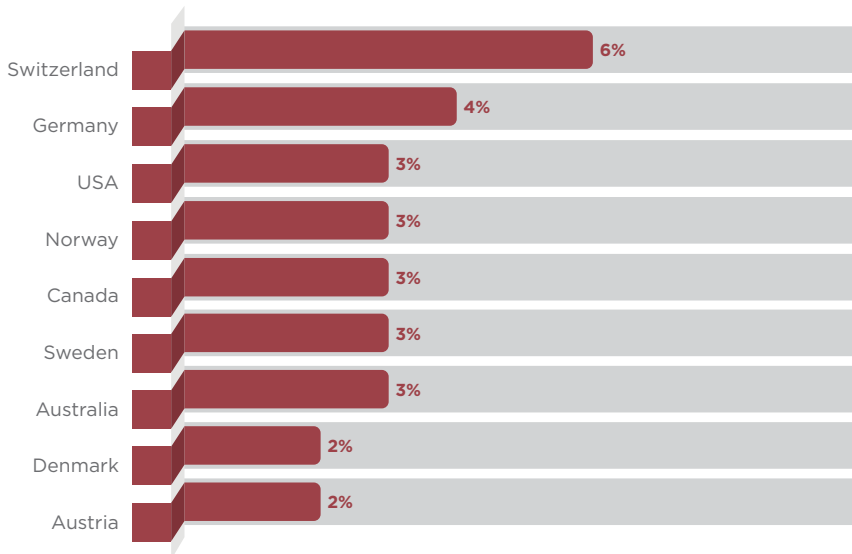
Wealth, however, is decisive to just how much heart goes into the relationship. Residents of wealthy EU14 countries were roughly twice as likely to select their own country than their poorer counterparts. Amongst respondents who selected their own country, the United Kingdom and Germany tied for the top spot at 64 per cent.

The Brit’s especially high preference for their own country is supported by their decision to exit the European Union. They also showed the least interest in living in other European countries. Instead, Brits favoured English-speaking Commonwealth countries, especially Australia, New-Zealand and Canada.

Economic status appeared to influence the results for choosing Germany. The country is most attractive to citizens of poorer Central and Eastern European countries. It was far less popular amongst residents of richer countries including the United Kingdom, Spain and the Netherlands.

On average half of those who did not choose their own country selected another European Member State, whilst 20 per cent picked another European country, such as Norway and Switzerland, rather than one outside Europe. This shows both a preference for one's own country and for Europe. Sweden stood out (57%) as a country similarly attractive amongst its own residents and those living in other Member States.

Which country do you consider as the best one to live in?
Most selected countries (EU14)



SWITZERLAND LEADS AND WEALTH MATTERS

The most popular country in the global ranking proved to be Switzerland (6%), a result supported by its historically high performance on the OECD's Better Life Index.² Switzerland has long placed amongst the best places to live in the world, scoring especially high for personal safety, natural beauty, infrastructure and earning potential.

With countries like Germany and the United States holding the other top spots, the importance of economic status was once again revealed. All the top-ranking countries are amongst those with the highest GDP per capita in the world.

The non-European countries to make the top list included the United States, Canada and Australia - all of which have a shared history and culture with Europe. Other countries in Asia, Africa and Latin America did not feature at all.

² OECD. 2017. OECD Better Life Index. [ONLINE] Available at: <http://www.oecdbetterlifeindex.org/countries/switzerland/>. [Accessed 3 December 2019].



BUT WHY?

Beyond a simple popularity contest, we asked the EU14 why they made their country choice. What are the factors that would make them stay in their home country or leave it behind for someplace new? Of the diverse reasons our survey presented, living standards and economic performance proved the most decisive to the EU14.

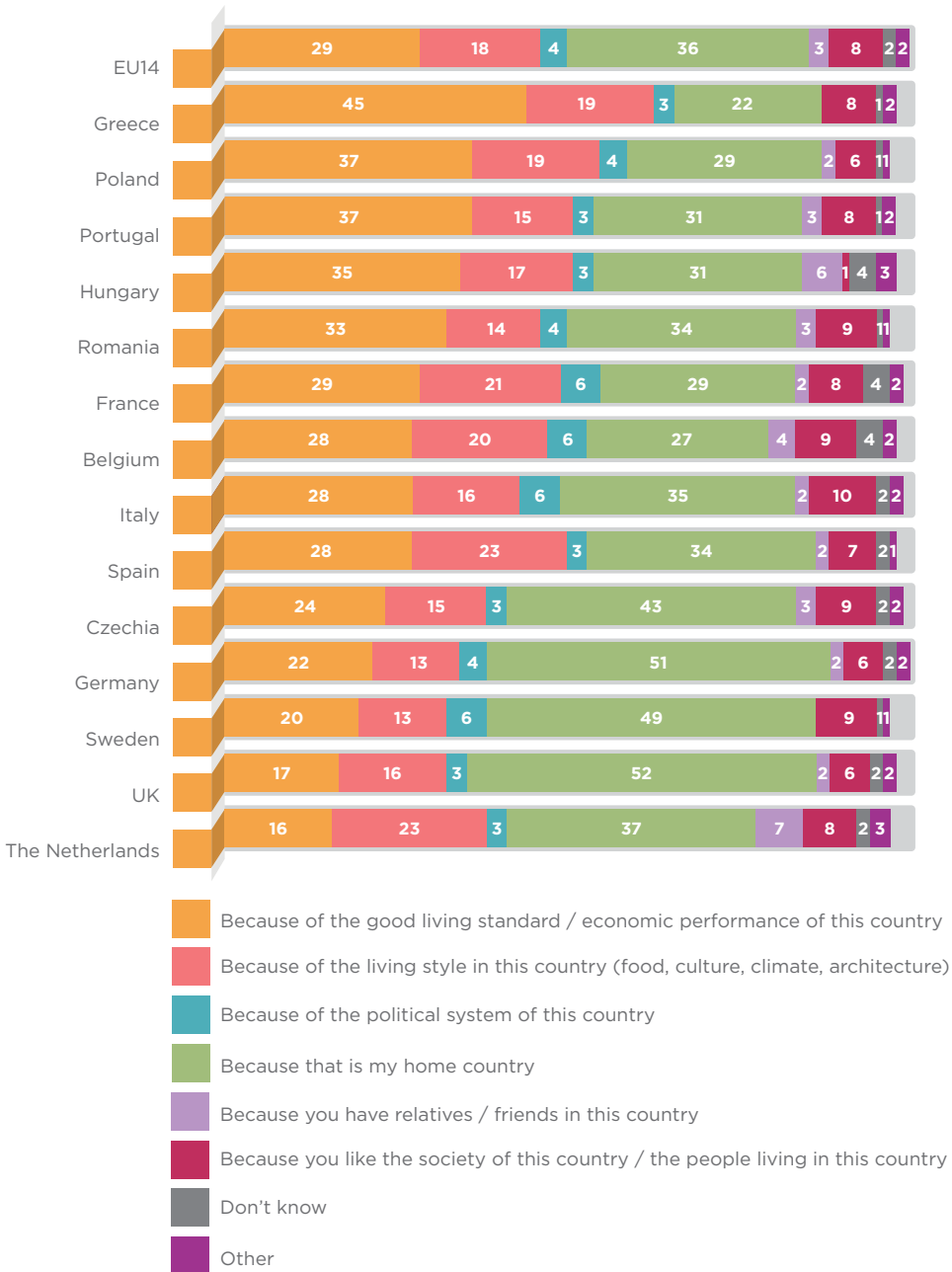
This was especially true in poorer countries. Respondents in Greece (45%), Poland (37%), Portugal (37%), Hungary (35%) and Romania (34%) want to move to another country mainly because they seek better living standards. In contrast, people already living in wealthy countries were less influenced by living standards and economic development. The ratio of respondents who made this choice was not even half as high in the Netherlands (16%), the United Kingdom (17%) and Sweden (20%).

Lifestyle in the chosen country - which relates to food, culture, climate and architecture - also was influential (18%). The criteria that proved of very little importance to respondents included political systems, friends and relatives and society in the country.

OPENING A WORLD OF OPPORTUNITY

Freedom of movement is one of Europe's biggest achievements, allowing citizens to live and work in any Member State, as well as countries in the European Economic Area and Switzerland. Globalisation has also opened a world of opportunity for Europeans to pursue their dreams abroad.

Why did you choose that country? (in %)





DREAMS FOR HAPPINESS

THE KEY TO HAPPINESS IS FINANCIAL SECURITY AND FREE TIME

European countries regularly rank amongst the happiest in the world.³ What is the European dream for even greater happiness? Greater financial security and free time topped the list in our survey. Imagine if political leaders responded to what makes citizens happy rather than what drives their fears.

³ World Happiness Report. 2019. [ONLINE] Available at: <https://worldhappiness.report/>. [Accessed 3 December 2019].

HIGHLIGHTS



Although 55 per cent of respondents across the EU14 chose more financial security, the relative importance of this choice appears influenced by their country's macroeconomic status.

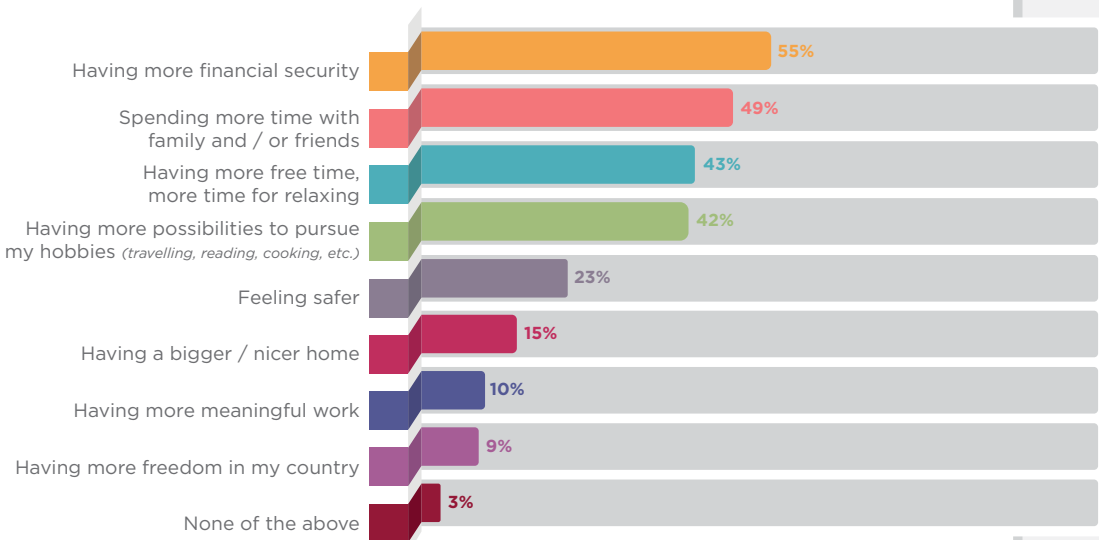
Instead of the rate of growth (which is amongst the highest in Hungary and Poland, and amongst the lowest in France and Italy), living standards appear to explain citizen's level of satisfaction with their financial security.

More free time emerged as the second most popular key to happiness. Despite substantial differences amongst Member States, the desire to spend more time with family and have more free time to relax were similarly high. This could lend support to policies calling for shorter working days or work weeks.

While 43 per cent of residents of capital cities believe that greater financial security would make them happier, amongst those living in the countryside the people who share this view was considerably higher at 58 per cent. This is just one indicator of the rural-urban divide that emerged from the survey and that demands greater attention in European cohesion policy.

Which of the following are most likely to make you happier?

*Choose a maximum of three answers from the list below.
(EU14)*





MORE FINANCIAL SECURITY

Although 55 per cent of respondents across the EU14 want more financial security, the relative importance of this choice appears influenced by their country's macroeconomic status.

The desire is highest in Greece (66%) and Hungary (67%), two countries hit hard by the financial crisis and amongst the poorest in the European Union. Sentiment is similarly high in other Central and Eastern European Member States including Poland (65%), Czechia (62%) and Romania (58%).

In contrast, the desire for more financial security is lower in France (45%), the Netherlands (48%), Spain (49%), Sweden (50%) and Italy (51%). Instead of the rate of growth (which is amongst the highest in Hungary and Poland, and amongst the lowest in France and Italy), living standards appear to explain citizen's level of satisfaction with their financial security.



MORE FREE TIME

More free time emerged as the second most popular key to happiness. Despite substantial differences amongst Member States, the desire to spend more time with family (49%) and have more free time to relax (43%) were similarly high. This could lend support to policies calling for shorter working days or work weeks.

Calls for more free time to relax were high (51%) in the richer economies of the Netherlands, Germany and the United Kingdom. And higher still in Romania (52%). Amongst Czechs and Greeks, however, demand was lower (39%).

Age also influenced the results. Demand for more free time to rest and relax was higher amongst respondents under the age of 55 who are of working age. This contrasts with older workers and pensioners who valued more financial security.

Active leisure, travelling, reading and other hobbies was another popular choice (45%). This is especially true amongst Portuguese (56%) and least so amongst Hungarians (32%).



“More free time emerged as the second most popular key to happiness. This could lend support to policies calling for shorter working days or work weeks.”

FEELING SAFER

Feeling safer would only make a modest 23 per cent of respondents happier, which may reflect the absence of a major terrorist attack in Europe in 2019. The Poles expressed the highest regard for safety (28%) compared to the French at the lowest end (17%). These results do not correlate with crime statistics in the countries surveyed.⁴

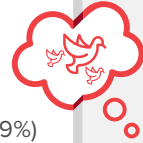


MORE FREEDOM

The relationship between greater freedom and happiness was surprisingly low (9%) given the growing threats to democratic norms in Europe and around the world today.

Compared to the EU14 average, Member States experiencing the greatest democratic declines⁵ did place a higher value on freedom, namely Poland (16%) and Hungary (13%). Governments in both countries have recently triggered Article 7 proceedings for breaching fundamental democratic rights enshrined in the Treaty of the European Union. Desire for greater freedom was slightly higher than average in Czechia and Romania (10%) too.

The Netherlands - a country amongst the most established democracies in the world and ranked as the fifth most democratic country in the European Union⁶ - proved a surprising outlier (10%).



PARTY MATTERS

Political affiliation matters in perceptions of freedom and happiness. When considering the voting preferences of respondents in Poland and Hungary, we learned that:

- 27% of supporters of the largest opposition party in Poland and 23% of opposition voters in Hungary thought that more freedom in their countries would make them happier.
- Just 3% of Polish government party (PiS) supporters and 5% of Hungarian voters who support the governing party (Fidesz) believe civil liberties are under threat in their countries.

MORE MEANINGFUL WORK

More meaningful work would make only 10 per cent of respondents happier on average across the EU14. In only four countries did that national average differ significantly from the European average.

The Germans and the Dutch were less likely to opt for this response (8%), whilst the Greeks (20%) and Czechs (16%) were disproportionately more likely to make this choice than the average European. The large number of Czechs working in the industrial sector - amongst the highest in the European Union - may explain this high result.⁷



⁴ European Commission, Eurostat. 2017. Crime statistics. [ONLINE] Available at: https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Crime_statistics. [Accessed 3 December 2019].

⁵ Economist Intelligence Unit. 2018. Democracy Index 2018. [ONLINE] Available at: https://www.eiu.com/public/topical_report.aspx?campaignid=democracy2018. [Accessed 3 December 2019].

⁶ Economist Intelligence Unit. 2018. Democracy Index 2018. [ONLINE] Available at: https://www.eiu.com/public/topical_report.aspx?campaignid=democracy2018. [Accessed 3 December 2019].

⁷ European Commission, Eurostat. 2017. Which sector is the main employer in the EU Member States? [ONLINE] Available at: <https://ec.europa.eu/eurostat/web/products-eurostat-news/-/DDN-20171024-1>. [Accessed 3 December 2019].



HAVING A BIGGER, NICER HOME

Housing conditions appear to play little role in citizens' happiness (15%). Yet, the share of respondents who desire a larger home was somewhat above average in Central and Eastern European Member States (21% in Hungary and Czechia, 18% in Poland and 16% in Romania).

Note that this survey question asked whether a larger and nicer home would make respondents happier. Answers to subsequent survey questions indicated that access to affordable housing is an increasingly critical issue in many Western European countries, especially in urban centres.





DREAMS FOR FUTURE GENERATIONS

OUR CHILDREN'S QUALITY OF LIFE WON'T BE BETTER THAN OURS

Whilst policymakers debate the Future of Europe, it is for future generations to live. Do the EU14 believe that future generations will be better off than today? On quality of life specifically, the view offered is surprisingly bleak.

HIGHLIGHTS



Only one in four European citizens believe that future generations will have a better life in Europe. One third believe that quality of life will be worse for future generations.



The optimists are more likely to be young, religious, pro-European Union, a resident of their country's capital and male. Those who fear for future generations have a profile in near complete opposition. These pessimists were more likely to be female, over the age of 55 and living in rural areas. In addition to being opposed to the European Union, they are also more secular.

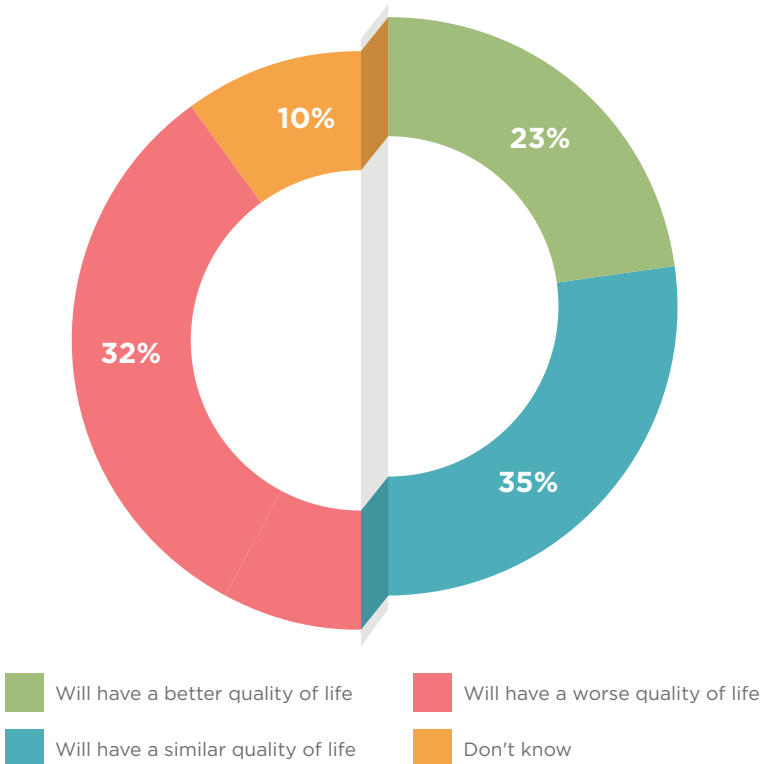


Residents of Belgium, France, Germany, Italy and the Netherlands were least likely to believe that their children would be better off.



The Swedes, Poles and Romanians emerged as the most optimistic about quality of life for future generations.

Do you think future generations will have a better quality of life or a worse quality of life?
(EU14)





THE OPTIMISTS

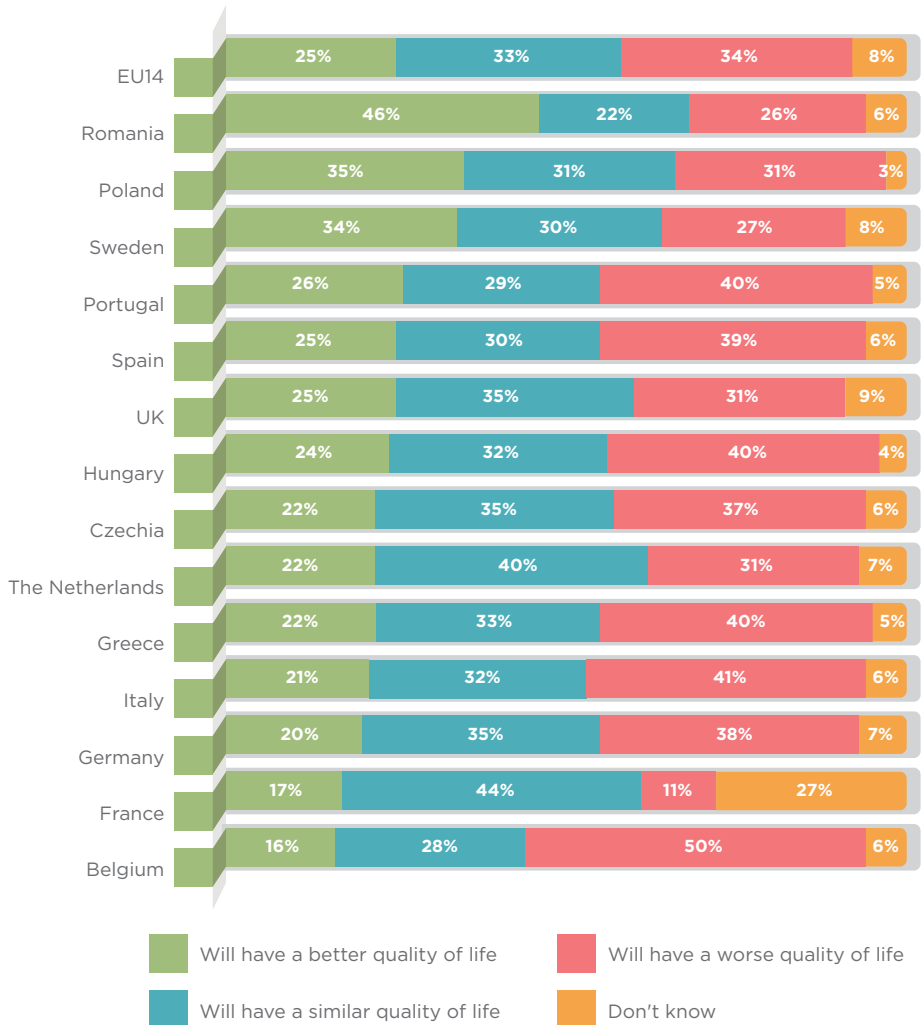
Those who believe in a positive future for future generations - the optimists - have a particular profile in our survey results. These respondents were more likely young themselves between the ages of 18 and 34. They were also more likely to be religious, pro-European Union, a resident of their country's capital and male.



THE PESSIMISTS

Those who fear for future generations have a profile in near complete opposition. These pessimists were more likely to be female, over the age of 55 and living in rural areas. In addition to being opposed to the European Union, they are also more secular.

Do you think future generations will have a better quality of life or a worse quality of life?



“It appears that those who live in Western Europe take the dimmest view.”



PESSIMISM FROM WESTERN EUROPE

At the Member State level, it appears that those who live in Western Europe take the dimmest view. Residents of Belgium (16%), France (17%), Germany (20%), Italy (21%) and the Netherlands (22%) were least likely to believe that their children would be better off. This pessimism may reflect the exceptionally low growth in GDP in these countries in recent years.

Belgium emerged as the most pessimistic Member State, despite Brussels significantly pulling up (35%) the country average - perhaps because of its large expat community. By excluding Brussels, the share of those with a rosy outlook on the future would be a mere 14 per cent. Differences were also seen between Flanders and Wallonia, two Belgian regions locked in a longstanding cultural and economic dispute. While 28 per cent of citizens living in Wallonia think future generations will be better off, only 11 per cent of those living in Flanders share this view.



OPTIMISM FROM THE NORTH AND EAST

The Swedes (34%), Poles (35%) and Romanians (46%) emerged as the most optimistic about the lives of future generations. In the case of the latter two countries, there has been much to celebrate on fiscal terms in recent years despite the threats to democratic progress.

Poland and Romania have benefited from rapid increases in living standards with a substantial boost in the minimum wage and living standards. Romania's especially rosy outlook may reflect its tripling of GDP per capita since 1992 and its expected continued convergence with the EU average.⁸

Are Swedes really so optimistic about future generations? The short answer is not all of them. Whilst residents of Stockholm are overwhelmingly likely (59%) to believe that their children will be better off, those living in Swedish villages exhibited some of the lowest levels (17%) of optimism in the EU14.

Sweden is not the only country with an urban-rural divide. We saw a similar result in the Netherlands. Residents of the capital, Amsterdam had more optimistic views (42%) than their rural counterparts.

⁸ GDP per capita in Romania averaged 6948.36 USD from 1990 until 2018, reaching an all-time high of 11534.90 USD in 2018 and a record low of 4349.90 USD in 1992. Source: Trading Economics, 2018. Romania GDP per capita. [ONLINE] Available at: <https://tradingeconomics.com/romania/gdp-per-capita>. [Accessed 3 December 2019].



DREAMS FOR ACHIEVEMENT

LOW FAITH IN THE PROMISE OF WORK AND ENTREPRENEURSHIP

The American dream is based on the promise that if you work hard and follow the rules, success and prosperity are achievable. No matter your background. Do the EU14 share this dream? The survey indicated alarmingly low faith in the promise of hard work and entrepreneurship. Instead, other less meritocratic factors appeared to play an outsized role in making or breaking their dreams.

HIGHLIGHTS



Luck appears to play an outsized role in making or breaking the European dream. A surprising 29 per cent of respondents believe it takes luck or a miracle to achieve one's dreams, whilst only 28 per cent believe that working hard could make their dreams come true.

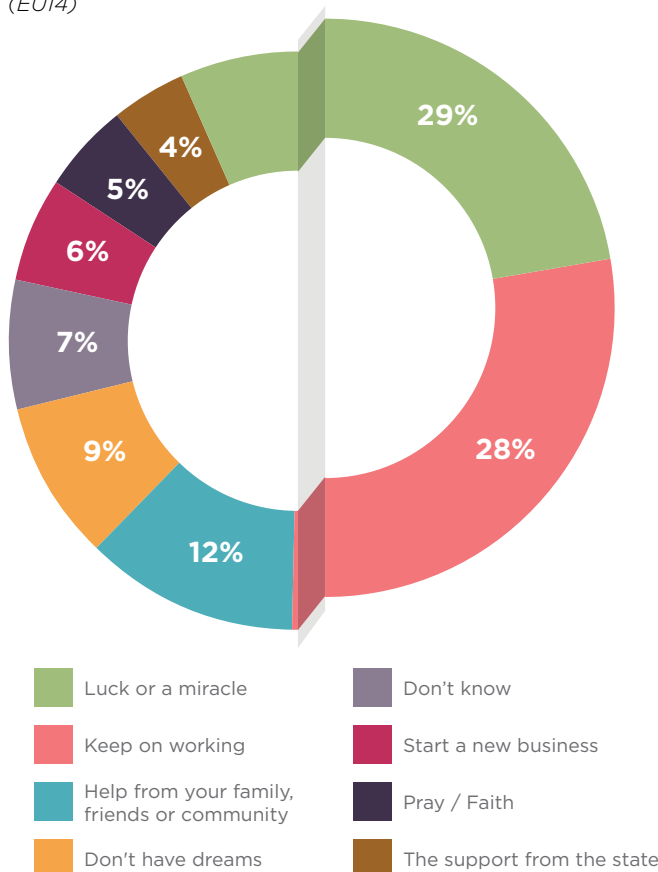


Central and Eastern European Member States with high GDP growth appear far more positive about the promise of work and entrepreneurship. Figures were substantially higher in Romania (67%), Hungary (57%) and Poland (45%) than Europe's historically rich economies.



Currently, Portugal seems to be Europe's hottest entrepreneurial spirit. Our data shows that 18 per cent of Portuguese would like to launch a new business to realise their dreams.

What will make your dreams come true?
(EU14)





THE BUSINESS OF DREAMS

What will make your dreams come true? Amongst the EU14, the results suggest alarmingly little faith in the promise of hard work or entrepreneurship. Just 28 per cent believe that working harder is the key. A mere 6 per cent would start a new business to this end. Broken down by Member State, however, the data reveals far more nuance.

Germany and Britain are Europe's economic engines. And yet, work in these countries is clearly not perceived as a sure-fire path to success. Only every fourth German (23%) and Brit (28%) respondent agreed that by working harder or starting a new business they can realise their dreams.

In contrast, countries in Central and Eastern Europe with high GDP growth appeared far more positive about the promise of work and entrepreneurship. Figures were substantially higher in Romania (67%), Hungary (57%) and Poland (45%) than Europe's historically rich economies.

POWER OF PORTUGAL

Where is Europe's hottest entrepreneurial spirit? Our data shows Portugal. Eighteen per cent of Portuguese would like to launch a new business to realise their dreams. This figure is slightly higher in villages (21%) and higher still amongst the middle-aged (23%).⁹ Altogether 52 per cent of Portuguese believe in hard work and entrepreneurship, the third highest result in the EU14.



FEELING LUCKY

Luck appears to play an outsized role in making or breaking the European dream. A surprising 29 per cent of respondents believe it takes luck or a miracle.

While a majority of respondents do appear superstitious, they are far less convinced by the power of religion. Just 5 per cent would turn to faith and prayer to make their dreams come true. This holds even amongst some of Europe's most religious Member States.¹⁰

The two countries where the public is most likely to vest their hope in luck, miracle or faith are the United Kingdom and Italy (40% and 40%, respectively)¹¹. Central and Eastern European countries, namely Romania and Hungary (21% and 21%, respectively), are once again on the opposite spectrum.

⁹ This spirit is translating to real business activity according to the think tank, Start-up Portugal. They found that 46% of new jobs created in 2017 came from start-ups, defined as companies younger than five years old. Source: South EU Summit. 2018. Rising Entrepreneurship Steers the Portuguese Economy Forward. [ONLINE] Available at: <https://www.southsummit.com/europe/portugal/rising-entrepreneurship-steers-portuguese-economy-forward>. [Accessed 3 December 2019].

¹⁰ Even among the most religious Greeks (8%) and Romanians (7%) the difference compared to the average value of the EU14 (5%) is within the survey's margin of error.

¹¹ According to economic data only Irish and Finnish are gambling more in the EU, but none of these countries were covered by the research. Source: The Economist. 2017. The world's biggest gamblers. [ONLINE] Available at: <https://www.economist.com/graphic-detail/2017/02/09/the-worlds-biggest-gamblers>. [Accessed 3 December 2019].

“Respondents in Eastern Europe appeared far more positive about the promise of work and entrepreneurship.”



GOING ALONE

Achieving the European dream also appears a decidedly solo enterprise. Just 12 per cent believe that families, friends or the broader community are the keys to make dreams come true, whilst only 4 per cent would count on the state.

If family and community matter anywhere in Europe, popular culture suggests it would be Italy. And yet, only 6 per cent of Italians would exclusively rely on these relationships to realise their dreams. Romanians (5%) expressed a similarly low sentiment. German respondents actually scored higher on this count at 23 per cent, further upsetting dominant cultural narratives.

With the exception of the Greeks (11%), the state was nowhere close to being perceived as a popular agent to realise people’s dreams.



NO DREAMS AT ALL

Clearly, not all people are dreamers. In our survey, about 9 per cent reported that they have no dreams at all and 7 per cent simply do not know.

This share is highest amongst Belgians (12%), Germans (11%) and Czechs (10%). Once again, Belgian villages and the country’s Flemish region emerged as slightly high outliers (16%).





DREAMS FOR SUPPORT

EUROPEANS MOSTLY RELY ON THEMSELVES

In the pursuit of their dreams, where do the EU14 look for support? A clear majority rely on themselves. Very few presume to receive help from the government and even less from trade unions, multinational companies, political parties or NGOs.

HIGHLIGHTS



Eastern Europeans appeared more self-empowered than the EU14 average, scoring 5 to 15 percentage points ahead on their personal role in realising their dreams.



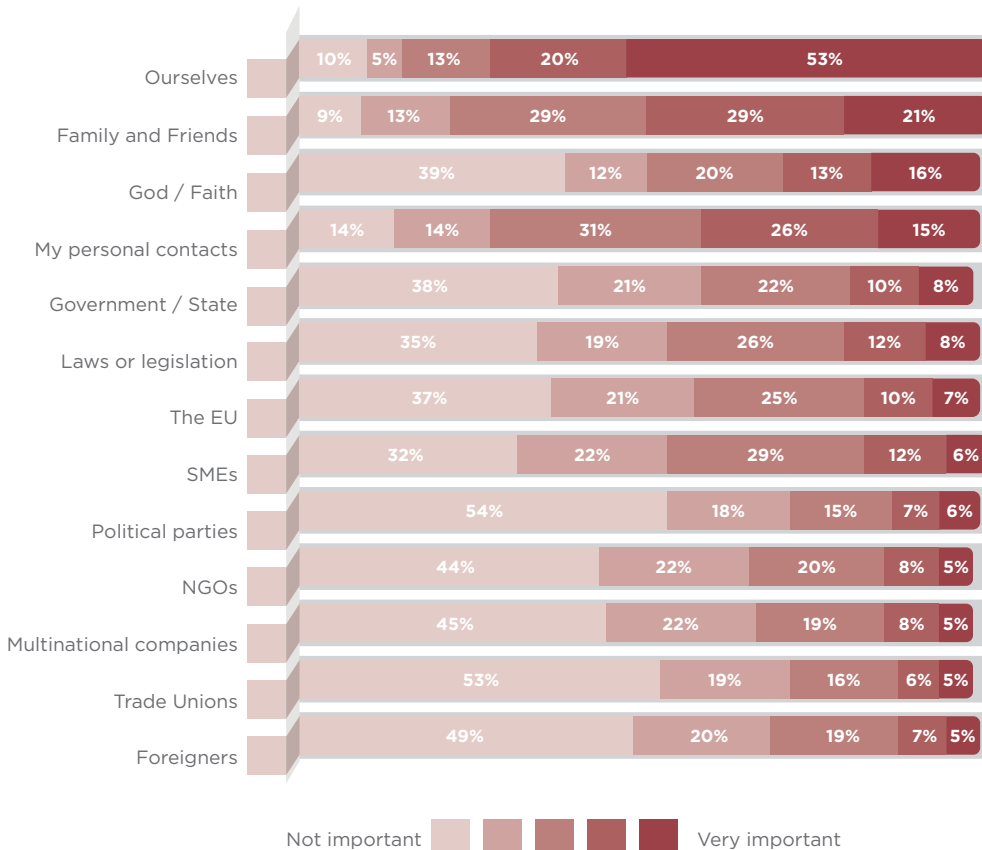
Hungarians (31%) and Greeks (30%) are most likely to find the government and the state important to realise their dreams. Germans (14%), Czechs and French (13% in both countries) regard these institutions with the least value.



Residents of capital cities tend to perceive the European Union as more important (25%) than residents of smaller municipalities (13%) showing a clear urban-rural divide.

Who helps the fulfilment of your dreams?

Evaluate the following actors, depending on their role in realizing your dreams (EU14)





“Residents of capital cities tend to perceive the European Union as more important than residents of smaller municipalities.”



URBAN-RURAL DIVIDES

When it comes to the role of European institutions in fulfilling citizens’ dreams, an urban-rural divide emerged from the results. Residents of capital cities tend to perceive the European Union as more important (25%) than residents of smaller municipalities (13%). Perceptions of national governments demonstrated a near identical split according to the level of urbanisation.

The bloc’s fourth largest economy, Italy displayed striking geographic differences in opinion. In large cities, people seemed more empowered. Just 3 per cent of urbanites do not see themselves as critical to realise their own dreams. In contrast, villagers (21%) and residents of small towns (15%) appeared far more pessimistic about their own power.

In Belgium and the Netherlands, sentiment was exactly the opposite. Residents of Brussels (23%) and Amsterdam (29%) appeared much less self-empowered than their rural counterparts.

UNEMPOWERED ATTITUDE IN GERMANY

Germans demonstrated a surprisingly pessimistic view of their own power in the survey. Only 54 per cent believe that they themselves play an important or very important role in realising their own dreams. This disempowered outlook is even more present amongst the country’s young, economically active population (47%). It stands in stark contrast to the more take-charge view amongst French (70%), Poles (89%) and Hungarians (87%).

Yet, a majority of German respondents still did not presume that other persons or institutions should realise their dreams for them. This suggests a firm belief in the importance of self-responsibility amongst Germans despite their apparent apathy towards action.



THE VIEW FROM THE EAST

In Eastern European Member States, respondents were substantially more likely (5 to 15 percentage points more) than the average EU14 (73%) to believe that they themselves play a decisive role in realising their dreams. In addition to the high values in Poland (89%) and Hungary (87%) already mentioned, we found similarly high figures in Czechia (79%) and Romania (85%). In other regions, only Portuguese and Greek results (85%) were similarly high.

When assessing the importance of families to help realise their dreams, Central and Eastern European Member States were also above average (56% to 62%), as were Portugal (65%) and Greece (57%).

THE ROLE OF RELIGION

As one would expect, assessments of god and religion differ substantially across Member States. Orthodox Christian countries are clearly different from the rest, as god takes a preeminent place in the expectations of Romanians (53%) and Greeks (41%). In both these countries, respondents were more likely than residents of other Member States to believe that god helps them to realise their dreams.

Romania and Greece are followed by two staunchly Catholic countries: Portugal (38%) and Poland (37%). Czechia emerged at the other end of the spectrum. As Europe's least religious country, 70 per cent of respondents do not think god plays an important role in realising their dreams. The ratio of respondents who do not think god plays an important role in realising their dreams is almost as high in Belgium (63%), where only Brussels (48%) significantly differs from the national average.

PERSONAL CONTACTS

Compared to the EU14 average (41%), personal contacts are regarded as considerably more important by Hungarians (64%), Greeks (60%) and Poles (58%) to achieve one's dreams. This perception may correlate to a related factor: anti-corruption organisations regularly list Hungary and Greece as the most corrupt Member States after Bulgaria - a country not included in this survey.¹²

Against the EU14 average, Hungarians (31%) and Greeks (30%) are also most likely to find the government and the state important to realise their dreams. Germans (14%), Czechs and French (13%) are most likely to regard these institutions with marginal value.

RULE OF LAW IN HUNGARY

Despite the growing threats to the rule of law in Hungary, respondents still valued the law's role in their lives. Our results showed that Hungarians are the most likely (34%) to think of law and legislation as important to fulfil their dreams. This sentiment remained consistent irrespective of political affiliation.

¹² Transparency International. 2019. CPI 2019: WESTERN EUROPE & EUROPEAN UNION. [ONLINE] Available at: https://www.transparency.org/news/feature/cpi_Western_europe_and_eu. [Accessed 3 December 2019].



DREAMS FOR DEMOCRACY

DEMOCRATIC VALUES REMAIN STRONG

The founders dreamed of a democratic Europe, united around fundamental values from freedom and dignity to equality and rule of law. In an era of growing authoritarianism and nationalism, is this a dream that still resonates with the EU14? On the whole, our survey shows yes.

HIGHLIGHTS



The good news for Europe is that democracy won by knockout with 78 per cent support over authoritarian leadership. Moreover, an overwhelming majority of Europeans would prefer greater individual freedom (69%) to strong government (31%). Still, the proportion of those who question the fundamental values of liberal democracy is still alarmingly high.



More citizens believe in progress (59%) than traditions (41%), and more Europeans opt for solidarity (68%) over competition (32%). However, Europe's family-friendly character is readily apparent with a whopping 75 per cent choosing family over individualism.



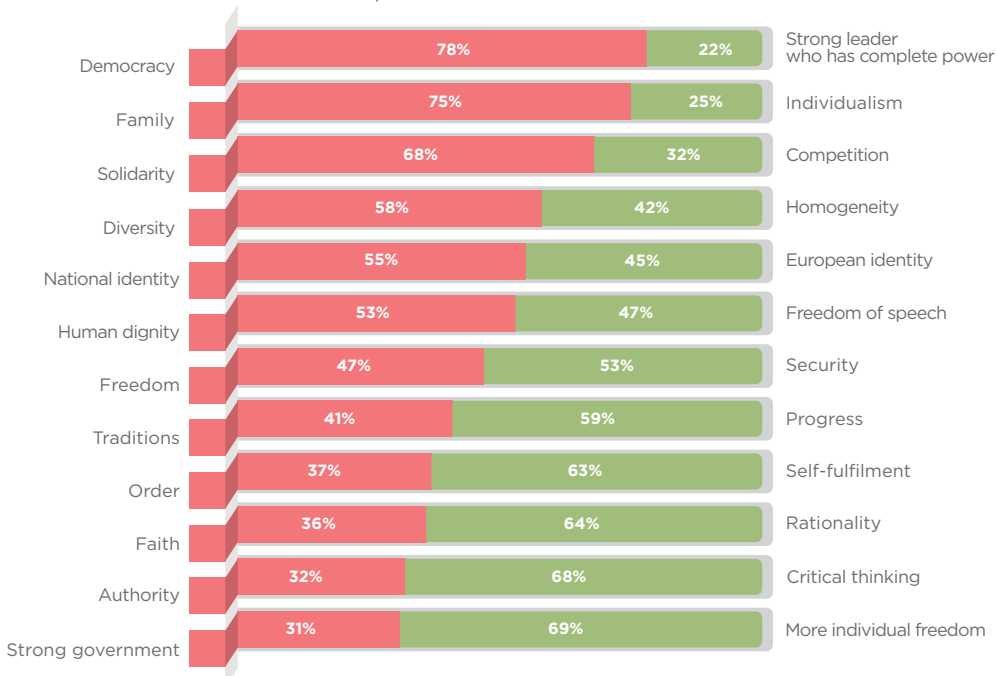
Europeans are indeed "united in diversity" as a majority of citizens (58%) across the EU14 prefer diversity to homogeneity. That still leaves 42 per cent, however, with a preference for similar cultural, social and ethnic groups.



European identity enjoyed a majority in three very pro-European Union countries: Spain (54%), Germany (54%) and Sweden (53%). In contrast, national identity was preferred in more Eurosceptic countries: Greece (57%), the United Kingdom (63%) and Czechia (69%).

Choose from the following pairs of values the ones that are more important for you (EU14)

Respondents were given pairs of European values and asked to choose the one most important to them.





DIVERSITY OVER HOMOGENEITY

“United in diversity” is the European Union’s motto, but is it valued in practice amongst a majority of people?¹³ According to our survey, it is a definite yes: 58 per cent of citizens across the EU14 prefer diversity to homogeneity.

That still leaves 42 per cent, however, with a preference for similar cultural, social and ethnic groups. The surge in nationalism and protectionism stemming from the migration crisis may be influencing this sentiment.

Comparing Member States, diversity had the highest share of supporters in Czechia, Portugal and the United Kingdom (73%). These three countries are an odd group given that Czechia and Portugal are not especially diverse, and migration influenced the Brexit vote. Czechia’s support for diversity is especially startling. It has one of the most Eurosceptic populations in Europe, showing deep anti-migration sentiment.¹⁴

The Italians delivered a mixed outcome despite the rising support for anti-migration parties in the country. Although, supporters of diversity were a minority (46%), especially in villages (39%), it was not the case in bigger cities (52%).



FAMILY OVER INDIVIDUALISM

Europe’s family-friendly character is readily apparent with a whopping 75 per cent choosing family over individualism. This preference remained high across Member States. The most pronounced differences related to the level of urbanisation. Whilst 80 per cent of rural respondents opted for family over individualism, amongst city inhabitants the ratio was 10 points lower (major urban areas 71% and capital cities 68%).

Amongst the EU14, Hungary, Greece and Portugal showed the highest preference for family (81%), whilst Swedes were the most individualistic in comparison (64%). Yet, Swedish society is more divided than this figure implies. Whilst 71 per cent of women preferred family, the corresponding value was only 59 per cent amongst men. The gap was even larger – almost 30 points – between Stockholm (46%), small towns (75%) and villages (79%).



RATIONALITY OVER FAITH

A clear majority (64%) of Europeans prefer rationality - the belief in reason or facts - over faith based on religion. At the Member State level, Orthodox Christian countries were most likely to choose faith (Romania 46% and Greece 45%), along with Catholic countries (Italy 42%).

Less religious countries had a predictably higher preference for rationality. Sweden ranked highest on this question (73%), followed by Czechia (71%), Belgium (71%) and Spain (71%).

¹³ The original version: “united in diversity” was selected in 1999. Later it was modified in 2000 to the current version. It was included in the plans on the European Constitution in 2004 and appeared in the Lisbon Treaty amendments in 2007.

¹⁴ Pew Research Center. 2019. European Public Opinion Three Decades After the Fall of Communism. [ONLINE] Available at: <https://www.pewresearch.org/global/2019/10/14/the-european-union/>. [Accessed 3 December 2019].

Residents of big cities including London, Stockholm and Paris were more likely to choose faith than rural areas. This might reflect the multiculturalism of these cities and the diverse religions and level of religiosity amongst immigrants.

INDIVIDUAL FREEDOM OVER STRONG GOVERNMENT



An overwhelming majority of Europeans would prefer greater individual freedom (69%) to strong government (31%). Those opting for strong government are highest in the two Orthodox Christian countries: Greece (41%) and Romania (40%).

Preference for a strong government is also relatively high in the United Kingdom (35%), sentiment that may be influenced by the political instability surrounding the Brexit negotiations.

Greater individual freedom enjoyed the highest level of support in Italy (81%) and France (79%). Both countries have experienced political turmoil and protest movements¹⁵ that may have swayed their preference for freedom. The French have shown particularly strong dissatisfaction with their political elites.¹⁶

Although its values are far closer to the average, it is worth noting that Hungary (74%) came in third on support for individual freedom.

SOLIDARITY OVER COMPETITION



This conceptual pair is meant to differentiate between left-wing economic values that promote solidarity and neo-liberal economic ones that promote competition. With two-thirds of the residents of the EU14 (68%) casting their vote for solidarity, the survey suggests a strong preference for left-leaning economic policy.

Portuguese respondents were the most likely to favour solidarity (79%), a sentiment reflected in the election of left-wing governments twice since 2015.

“With two-thirds of the residents of the EU14 casting their vote for solidarity, the survey suggests a strong preference for left-leaning economic policy.”



¹⁵ BBC. 2019. Italy's Sardines push back against Salvini's nationalist tide. [ONLINE] Available at: <https://www.bbc.com/news/world-europe-50631217>. [Accessed 30 December 2019].

¹⁶ Harris Interactive. 2019. Baromètre de confiance politique. [ONLINE] Available at: https://harris-interactive.fr/wp-content/uploads/sites/6/2019/12/Barometre_de_confiance_politique-Harris_Interactive-LCI_decembre_2019.pdf. [Accessed 31 December 2019].

Amongst those in favour of competition, the Brits scored highest at 45 per cent. As a global financial centre, the results in London were predictably even higher (50%). The second-place ranking of Sweden on this score (48% in favour of competition) reflects Scandinavia's unique model, which combines a competitive business environment with an active welfare state.

Almost all the post-communist countries surveyed – with the exception of Hungary – are far more likely to favour competition than western Member States.



PROGRESS OVER TRADITIONS

Results showed that a clear majority in the EU14 prefer progress (59%) over traditions (41%). Yet southern Member States were more likely to opt for progress whilst western ones leaned towards traditions. This sentiment aligns with election results in many Southern European countries where progressive parties have prevailed. Central European countries tended to more closely align with the EU14 average in favour of progress.

The United Kingdom (45%) and France (44%) were the most likely to opt for traditions, whilst Greece and Spain were the least likely (both 27%). Amongst the Belgians who chose traditions (42%), the regional divide between the Flemish (48%) and Walloons (28%) was once again present.

The level of urbanisation clearly impacted the results. Village residents demonstrated a preference for traditions (45%) compared to those living in capitals (36%). Similar divisions were seen surrounding religion: 48 per cent favoured traditions amongst the religious compared to the non-religious at 37 per cent.

Those who want to leave the European Union (52%) were especially more traditionalist than pro-European Union respondents (35%).



SECURITY OVER FREEDOM

Since the global war on terror, Europe has seen a rise in policies that aim to increase security but simultaneously encroach on individual freedom. How best to strike this balance is a matter of fierce debate. Each passing terror attack in Europe brings this difficult choice into stark relief for citizens. The migration crisis only adds more fuel to this fiery debate.

Surveying in this context, our results indicated that the majority of Europeans are willing to sacrifice their freedom (47%) for security (53%). This split was remarkably consistent across demographic categories.

Security was an especially attractive choice in three Central and Eastern European countries: Hungary (63%), Czechia (57%) and Poland (57%). The stoking of public fears about the surge of migrants from Muslim countries in the region has likely influenced this result.

Where does freedom still ring? Surprisingly in nearby Romania where 57 per cent chose freedom over security. Other countries favouring freedom included France (51%), the Netherlands (51%), the United Kingdom (50%) and Italy (50%). Although it did not breach the halfway mark, the figure was also high amongst Germans (46%).



HUMAN DIGNITY OVER FREEDOM OF SPEECH

Freedom of speech is at the heart of Europe's liberal values. Likewise is human dignity, the notion that every person is worthy of honour and respect.

When asked to choose between the two, respondents valued human dignity (53%) over freedom of speech (47%). A striking gap manifested itself on the age axis, with youth (18-24: 61%) being far more likely to opt for freedom of speech than older respondents (55+: 40%).

Some notable differences emerged between Member States. Swedes (61%) and Belgians (56%) favoured freedom of speech significantly more than Greeks (33%) and Poles (37%).



DEMOCRACY OVER A STRONG LEADER

In their ideal form, democratic leaders operate with a deliberative and consultative style in response to citizen needs and interests. These leaders are the opposite of "strong men" in authoritarian regimes who operate with complete control. We asked respondents to choose between these leadership styles, a choice that essentially equates to a vote for liberal democracy or autocracy.

The good news for Europe is that democracy won by knockout (78%) in the EU14. Even in Poland and Hungary where people have embraced more authoritarian leaders recently, respondents still overwhelmingly preferred democracy.

This positive outlook is set back, however, by urbanites who have a slightly lesser preference for democracy. Indeed, the margin of difference between residents of capital cities (69%) and villages (85%) is statistically significant at 16 percentage points.

Only slight differences emerged between the countries at the extremes of this spectrum. Swedes and the Brits were the least supportive of liberal democracy (72% in each), whilst Portugal and the Netherlands (84%) were the most. The Swedish data does give some cause for concern since liberal democracy barely captured majority support in Stockholm (52%).



CRITICAL THINKING OVER AUTHORITY

When the choice is between authority and critical thinking, respondents can also be seen as rendering a judgment about the state's role in controlling society. Across the EU14, we found that those who prefer critical thinking are in a decisive majority (68%).

Stark differences do emerge, however, amongst Member States. Communist governments are known for exercising vast control over society and discouraging citizens from critical thinking. Respondents in the post-communist countries surveyed appear to still have a lingering preference for some kind of paternalism. The share of respondents who chose authority was especially high in Poland (52%), Czechia (45%), Hungary (42%) and Romania (39%).

The Netherlands (17%) and Sweden (20%) are at the opposite end of the spectrum with a preference for critical thinking, results that track more closely to the EU14 average.



NATIONAL IDENTITY OVER EUROPEAN IDENTITY

Do people identify more with their national identity, as say French or Hungarian, or their status as Europeans? This is a question that goes straight to the heart of the European project and the goal of becoming an ever-closer union.

Whilst supporters of national identity prevailed (55%) across the EU14, substantial differences emerged amongst demographic groups and amongst Member States.

Whilst the majority (57%) of youth (aged 18-24) chose European identity, the ratio of those who prefer national identity rises with age. Assessed by residence, supporters of national identity are in the majority everywhere except capital cities (46%).

The differences between countries are in line with the overall support of the European project¹⁷ in the given countries. European identity enjoyed a majority in three very pro-European Union countries: Spain (54%), Germany (54%) and Sweden (53%). In contrast, national identity was preferred in generally Eurosceptic countries: Greece (57%), the United Kingdom (63%) and Czechia (69%).

¹⁷ Pew Research Center. 2019. European Public Opinion Three Decades After the Fall of Communism. [ONLINE] Available at: <https://www.pewresearch.org/global/2019/10/14/the-european-union/>. [Accessed 3 December 2019].





DREAMS UNDER THREAT

CLIMATE CHANGE AND MIGRATION ARE EUROPE'S BIGGEST ISSUES

Europe faces more collective threats today than ever in the Union's history. What do citizens in the EU14 believe are the biggest issues for Europe over the next 10 years? Climate change and migration top the list, threatening their dreams for a brighter tomorrow.

HIGHLIGHTS



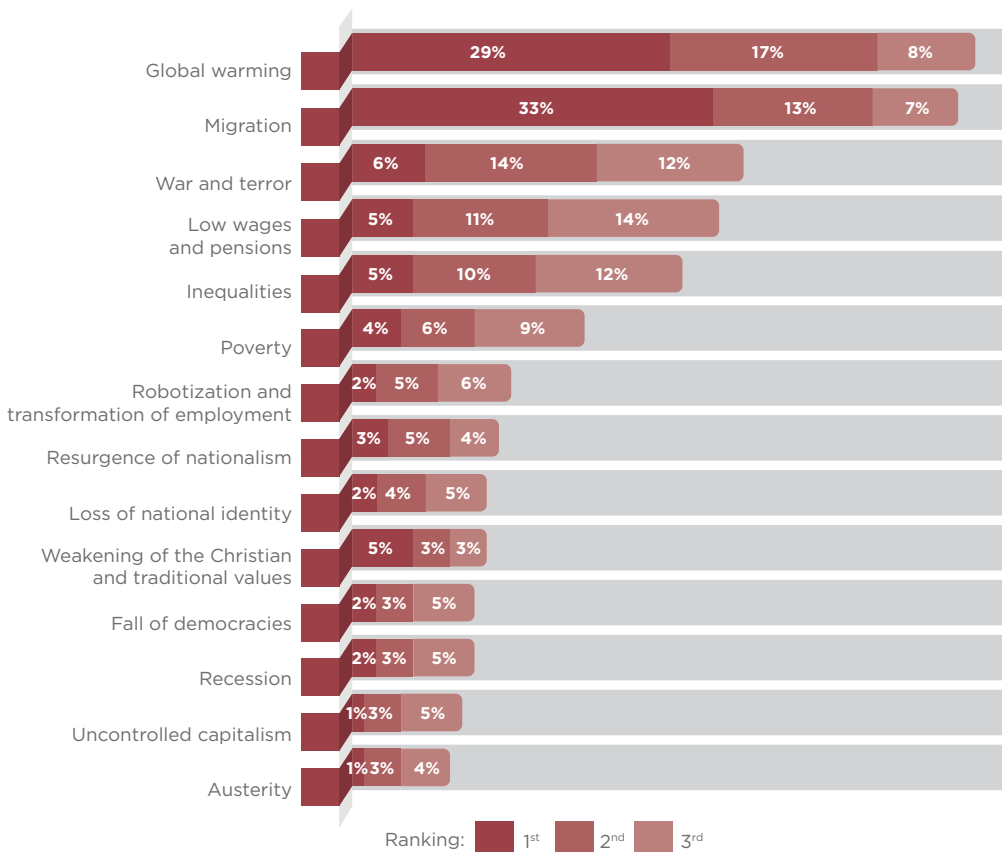
Europeans believe climate change (54%) and migration (53%) are the top challenges facing the continent.

Global warming is the top concern in five of the EU14 countries and the second most important in all other countries surveyed.

Climate change alarmed respondents the most in Portugal (68%), France (63%) and Germany (61%) and the least in the Netherlands (49%), the United Kingdom (44%) and Greece (37%).

Whilst low levels of pay and pensions primarily concerned the Spanish (40%), the Hungarians (34%), Italians and Belgians (32% each) are also troubled by these issues. Growing social inequality was most likely to raise concerns amongst those living in Southern Europe.

Which of the following do you think will be the biggest issues facing Europe over the next decade? (EU14)



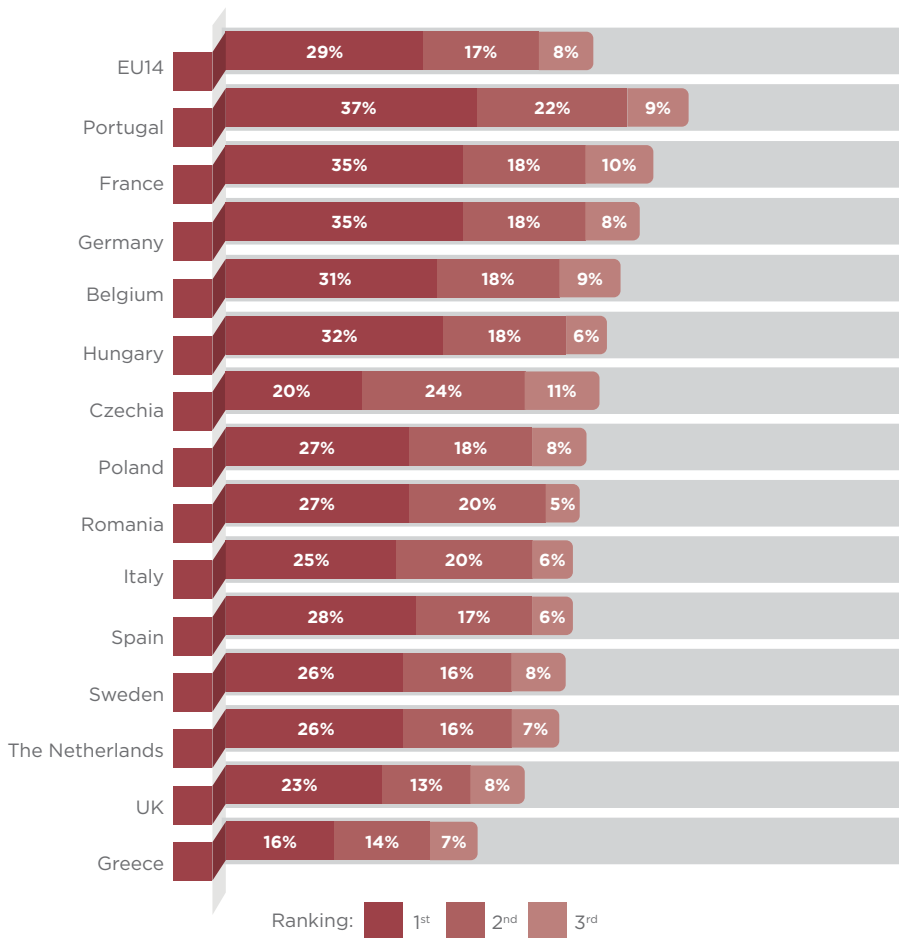


GLOBAL WARMING TOPS THE LIST

Global warming - the gradual heating of Earth's surface, oceans and atmosphere - proved to be the most vexing concern (54%) across the EU14. Yet, respondents in some countries are clearly more alarmed than others. Portugal (68%), France (63%) and Germany (61%) were the most concerned, while the Netherlands (49%), the United Kingdom (44%) and Greece (37%) were the least troubled.

Global warming is the top concern in five of the EU14 countries and the second most important in all other countries surveyed. There was no country where climate change was not amongst the most important concerns.

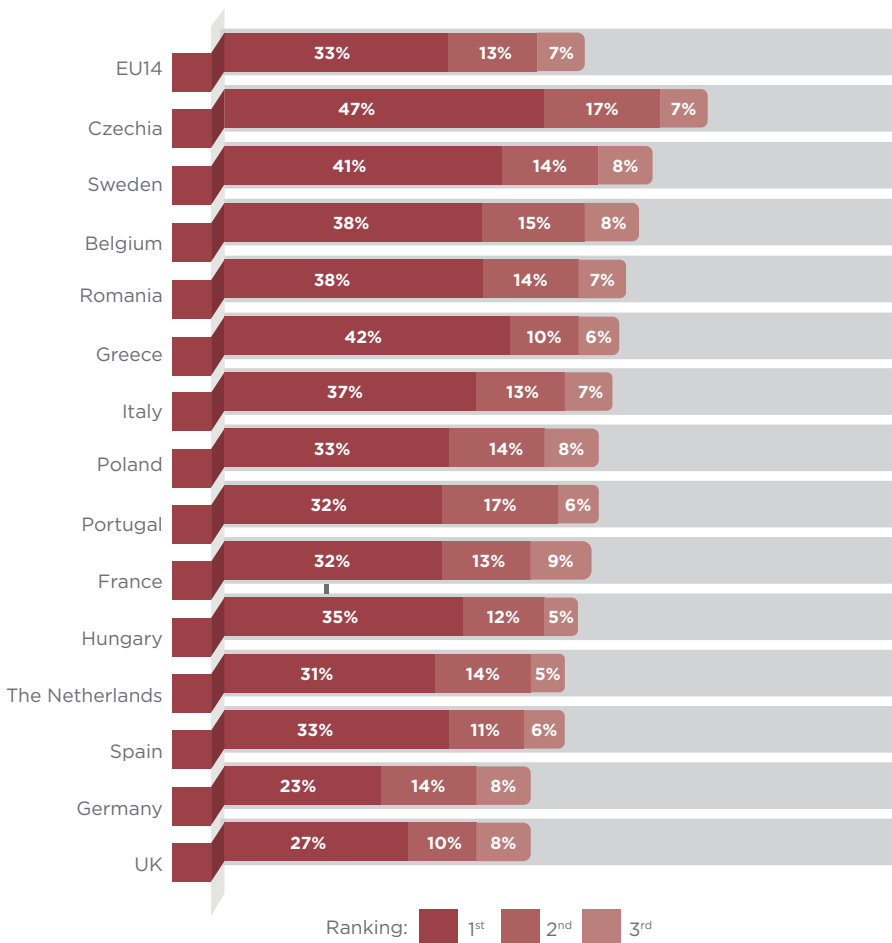
*Which of the following do you think will be the biggest issues facing Europe over the next decade?
Percentage of those who chose "global warming"*



“There was no country in our survey where climate change was not amongst the most important concerns.”



Which of the following do you think will be the biggest issues facing Europe over the next decade?
Percentage of those who chose “migration”





MIGRATION IS A VERY CLOSE SECOND

Migration was also clearly deeply concerning (53%) across the EU14, just one percentage point less than climate change. This issue is most commonly associated with the flow of refugees seeking asylum in Europe from war-torn countries in the Middle East and Africa as well as with the rise of economic migrants seeking opportunity in Europe from around the world.

The Czechs emerged as the most likely to view migration as the most important challenge facing the continent with 71 per cent ranking it amongst their top three concerns. The Czechs were followed by the Swedes (63%) and Belgians (61%). The extraordinarily high level of concern amongst Czechs is a predictable sentiment given the current government's vocal and staunch opposition to migration.

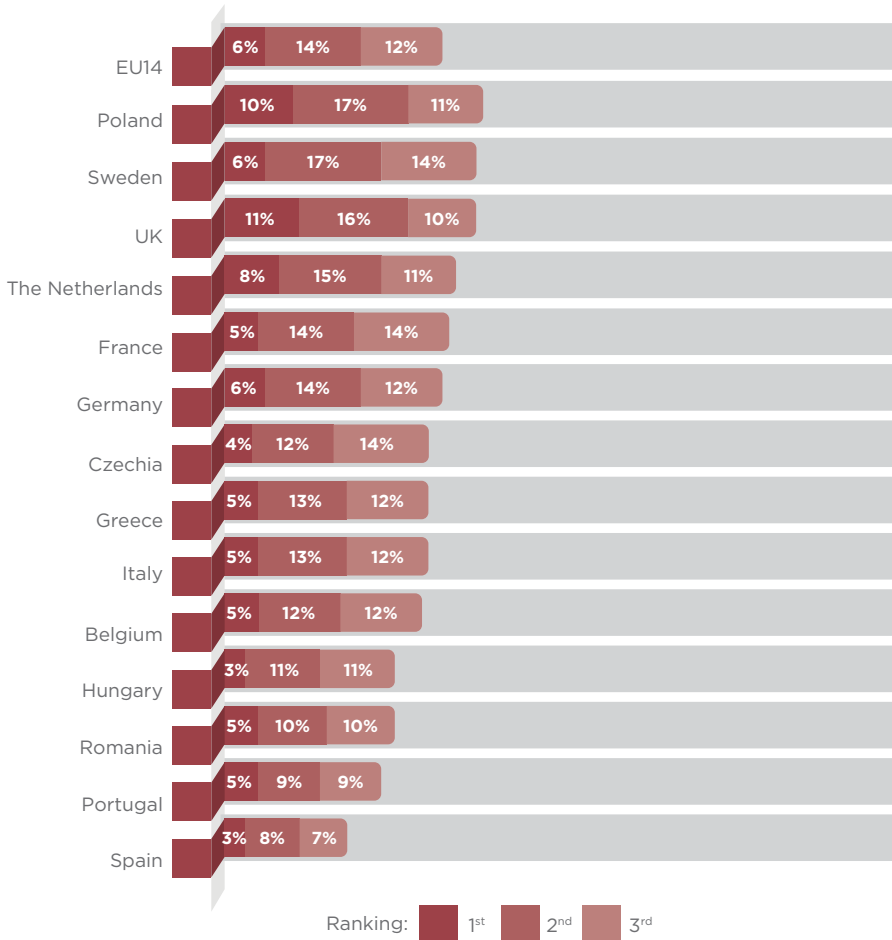
A striking result of this survey were the Polish and Hungarian figures (55% and 52% respectively), both within the margin of error of the EU14 average. Like Czechs, these governments have also been hostile to migration, and yet their citizens reported less concern.

Another relatively low result was Italy (57%) where former minister of the interior, Matteo Salvini has gained widespread popularity for his anti-immigrant rhetoric and policies.¹⁸ Yet, migration is indeed a top concern related to Europe in Italy.

Amongst the EU14, migration was least concerning to the Spanish (50%), Germans (45%) and Brits (45%). This result, however, is in sharp contrast to other public opinion surveys and election results. Our account of this discrepancy is that it reflects the wide spread of concerns registered in these countries. Migration is still a concern, but one of many.

¹⁸ Deutsche Welle. 2019. Salvini closes Italy's ports to German refugee rescue ship. [ONLINE] Available at: <https://www.dw.com/en/salvini-closes-italys-ports-to-german-refugee-rescue-ship/a-50183139>. [Accessed 3 December 2019].

*Which of the following do you think will be the biggest issues facing Europe over the next decade?
Percentage of those who chose "war and terror"*



WAR AND TERROR STILL FEARED

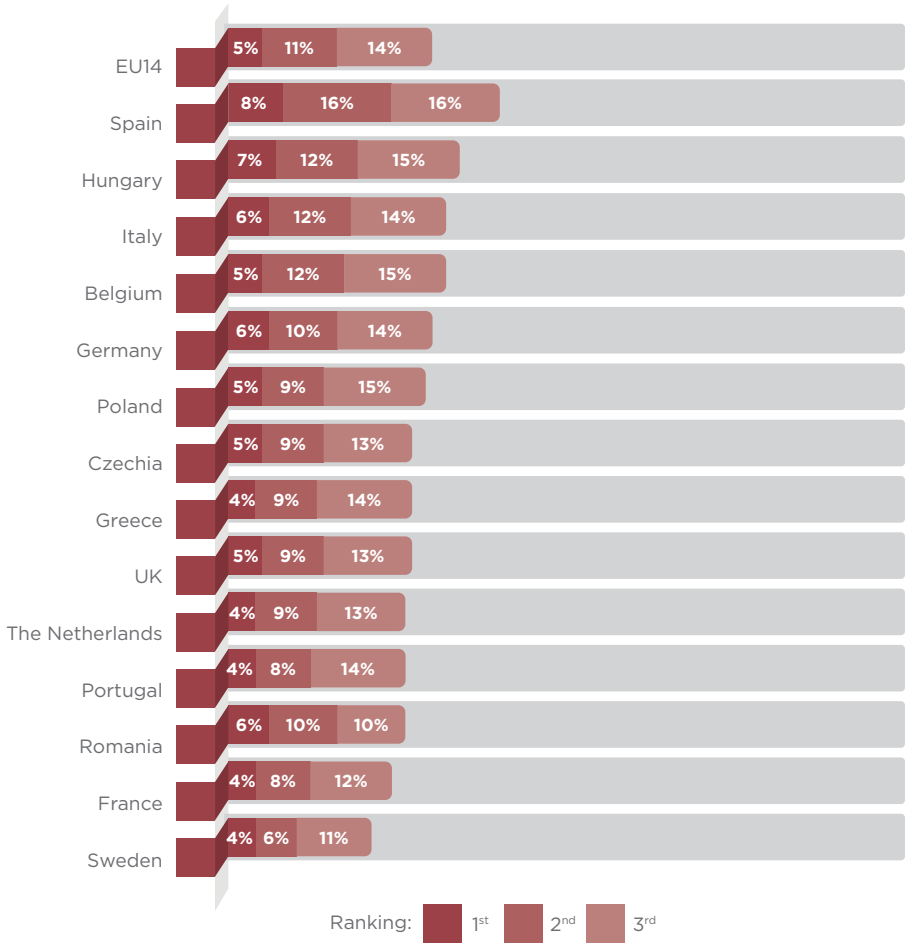
The fear of war and terror (32%) came in third on the list of concerns across the EU14. Whilst lagging considerably behind climate change and migration, the results still indicate that physical security - or the lack thereof - is still very much on the minds of Europeans.

Concern was highest in Poland (38%), Sweden (37%) and the United Kingdom (37%) and lowest amongst Hungarians and Romanians (25% and 25%, respectively), Portuguese (23%) and Spanish (18%). The high level of concern reported in Poland and Sweden may be correlated to the growing fear in both countries over emerging threats from Russia.¹⁹

¹⁹ The Economist, 2018. Russia's growing threat to north Europe. [ONLINE] Available at: <https://www.economist.com/europe/2018/10/06/russias-growing-threat-to-north-europe>. [Accessed 3 December 2019].

The relatively high concern recorded amongst the Brits, Dutch, French and Germans is likely influenced by the fact that all have experienced acts of terrorism. Brussels has been serially targeted by terrorists in recent years and yet residents appear surprisingly less distressed there; just 29 per cent rank terror and war as their main concern.

Which of the following do you think will be the biggest issues facing Europe over the next decade?
 Percentage of those who chose "low wages"



LINGERING FINANCIAL CONCERNS

Other prominent worries in the rankings related to financial concerns: low wages and pensions (30%), inequalities (27%) and poverty (19%). A relative few (13%) were anxious about robotisation and transformations in the labour market.

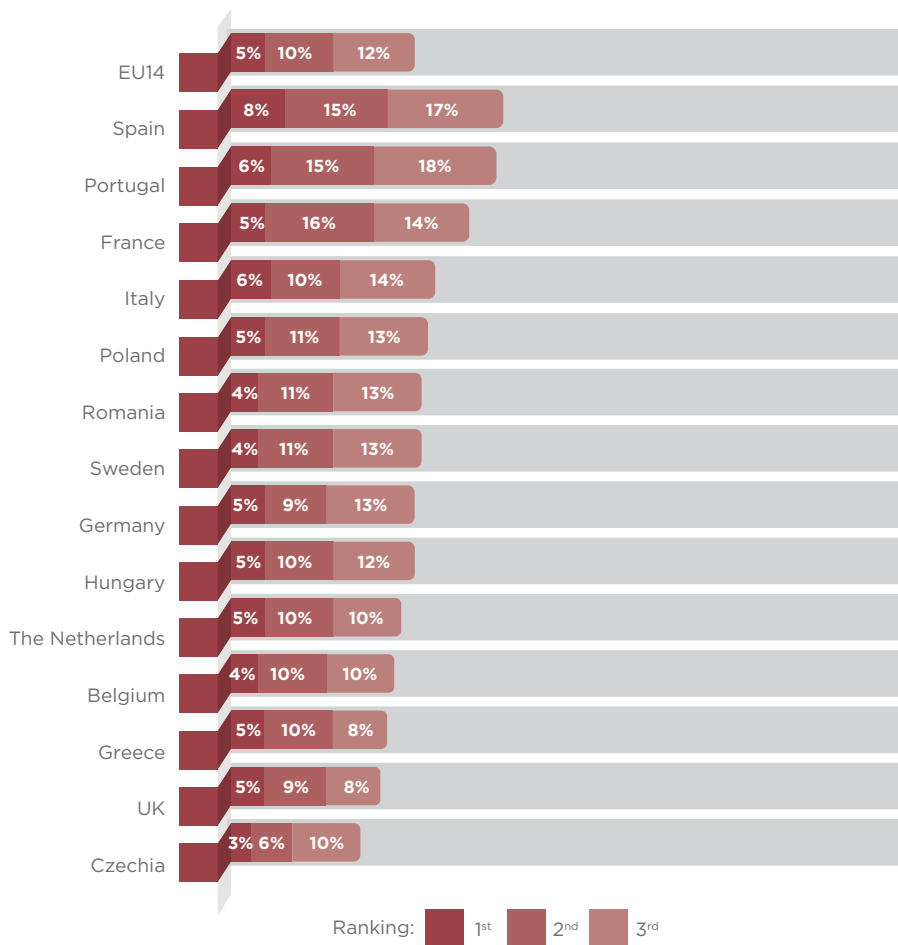
Low wages and pensions concern the Spanish (40%), Hungarians (34%), Italians and Belgians (32% each) the most. The Dutch, Portuguese, Romanians (26% each), French

(24%) and Swedes (21%) were least likely to consider these amongst the major problems facing Europe in coming years.

The concerns of Spanish and Italian respondents seem to reflect the lingering impact of the euro crisis, which followed on the heels of the 2008 financial crisis. Both countries continue to pay a high price for their governments' economic policies.

Hungary's top position likely reflects its place as the fourth lowest country on Europe's pay scale – workers only make less in Latvia, Romania and Bulgaria.²⁰ Despite their position in pan-European salary rankings, Romanians were amongst the least concerned about low pensions and wages.

Which of the following do you think will be the biggest issues facing Europe over the next decade?
Percentage of those who chose "inequalities"



²⁰ European Commission, Eurostat. 2019. Minimum wage statistics. [ONLINE] Available at: https://ec.europa.eu/eurostat/statistics-explained/index.php/Minimum_wage_statistics. [Accessed 3 December 2019].

In the last few decades, Europe has witnessed a sharp rise in social and economic inequalities. Our survey suggests that concern about these inequalities is greatest in Europe's south.

Spanish (40%), Portuguese (39%) and French (35%) respondents all ranked this issue amongst their top three concerns. The demonstrations of the Spanish Indignados movements in 2011 and the French Yellow Vest protests in 2019 clearly reflected the especially high wealth and income gaps and the social dissatisfaction in these countries.

Those least concerned about inequality are the Greeks (23%), Brits (22%) and Czechs (19%), but this result mainly due to the fact that citizens have many similarly important concerns in these countries.





DREAMS FOR LEADERSHIP

NO DECISIVE WINNER OR LOSER

Who or what should determine the Future of Europe? European institutions? National governments? Where do citizens fit in and the host of interest groups? The answer to this thorny leadership question may determine Europe's future more than anything else. Our survey shows citizens in the EU14 are highly divided on this fundamental question.

HIGHLIGHTS



Whilst there were no decisive winners or losers, respondents did appear to agree on giving citizens greater say in political decision-making and showed equal regard for European institutions and national governments.



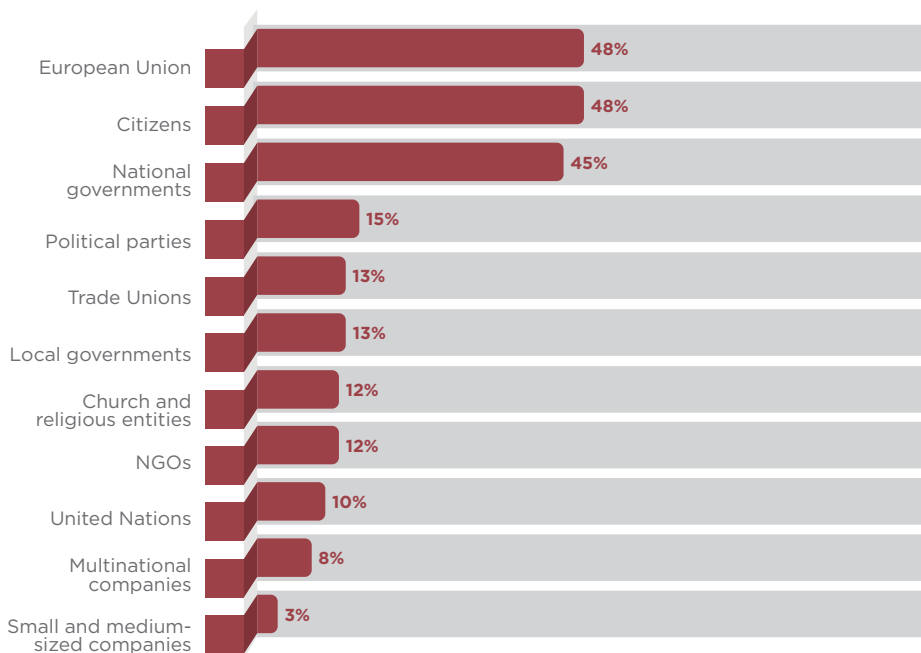
The 48 per cent support for citizen leadership does illustrate broad consensus for greater citizen engagement in European politics. This fact and the high turnout of the 2019 European Parliament election should motivate European policy-makers to better address and respond to citizens' expectations.



In comparison, very few respondents wanted political parties (15%), trade unions (13%) or NGOs (12%) to lead on their behalf.

Which of the following organisations should have a bigger role in handling these issues related to the future of Europe?

(EU13*, To select up to 3)



* Poland is excluded due to technical reasons



DIVIDED OVER LEADERSHIP

The Future of Europe debate emerged in response to the growing nationalism sweeping Europe as well as the United Kingdom's departure from the European Union. Pro-European groups who aspire for an "ever closer union" see this discussion as a historic opportunity to revive plans for deeper integration. This has raised alarms amongst eurosceptics who fear that national governments cede too much sovereignty to Brussels.

In this context, we asked citizens who they think should play a leading role in handling the most important problems Europe is facing. Able to make up to three selections, 48 per cent chose the European Union and citizens, respectively, and 45 per cent chose national governments. This result yielded no decisive winner or loser for control over the Future of Europe.

Yet, the 48 per cent support for citizen leadership does illustrate broad consensus for greater citizen engagement in European politics. In comparison, very few respondents wanted political parties (15%), trade unions (13%) or NGOs (12%) to lead on their behalf.

Interestingly, eastern and southern Member States emerged as overwhelmingly willing to entrust the European Union with tackling the challenges facing the continent. In Romania (69%), Hungary (68%), Portugal and Spain (67%) at least two-thirds of respondents opted for European leadership.

In Romania and Hungary, this is likely related to the financial benefits these countries receive from the European Union.



“This result yielded no decisive winner or loser for control over the Future of Europe.”



CALLING ON MEMBER STATES

What about countries that lean more towards national governments having a bigger say in European affairs? Where does the idea of a "Europe of Nations" resonate most?

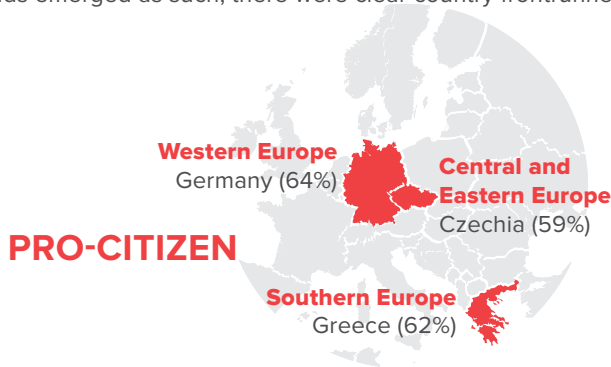
In this respect, Czech (55%), Dutch (51%), Spanish (50%) and Italian (49%) respondents were clearly in favour of national governments taking the lead. The results in Czechia and Italy may have been influenced by the eurosceptic governments in power during data collection.

The top-tier results in Romania (55%) and Hungary (49%) made them simultaneously strong supporters of both the European Union and national governments in Future of Europe debates.

In contrast, respondents in Belgium (39%), France (37%), Sweden (34%) and Germany (32%) were least likely to call on Member States to lead. This is supported by the fact that all four of these countries have urged for more prolific engagement by the European Union to tackle global challenges.

CITIZENS SHOULD CALL THE SHOTS

Where do citizens want to take the lead on determining the Future of Europe? Although no regional trends emerged as such, there were clear country frontrunners by region.



POLITICAL PARTIES, TRADE UNIONS, NGOs AND CHURCHES

Political parties have stewarded Europe's past, but citizens clearly do not favour them to lead the future. They placed fourth in the results, lagging 33 percentage points behind greater participation of citizens. This sentiment is supported by citizen's growing distrust of and dissatisfaction with political elites in recent years.²¹

Church and religious entities placed fifth (12%) with trade unions and municipal government (13%) trailing just behind – but within the survey's margin of error. A greater role for NGOs and the United Nations in determining the Future of Europe is a priority for roughly the same number of people.

Whilst support for business leadership was at the very end of the scale, respondents did indicate a preference for multinational companies (8%) over SMEs (3%). Given the distrust of "big business" rising from the economic crisis, this is a somewhat surprising result.

PARTY OUTLIERS

Political parties were clearly seen as unpopular leaders across the EU14, except in the Netherlands. Over a quarter of Dutch respondents (28%) chose political parties to lead the Future of Europe.

In contrast, Greek respondents (6%) were least likely to call on political parties to lead. This suggests that even though the economic and political crisis in Greece has finally abated, trust in the ruling political elite has not yet been restored.

²¹ See here, for example: <https://www.edelman.com/trustbarometer>



DREAMS FOR TAXPAYER MONEY

YES TO MORE WELFARE SPENDING

Where do citizens want to see their national governments invest more taxpayer money? Our results show a clear preference for welfare spending, especially on healthcare, pensions and education.

HIGHLIGHTS



Europeans are most likely to favour more spending on healthcare and pensions, demonstrating sensitivity to issues that predominantly affect the elderly. There is near universal consensus in Central and Eastern European countries that their respective healthcare systems need public investment.



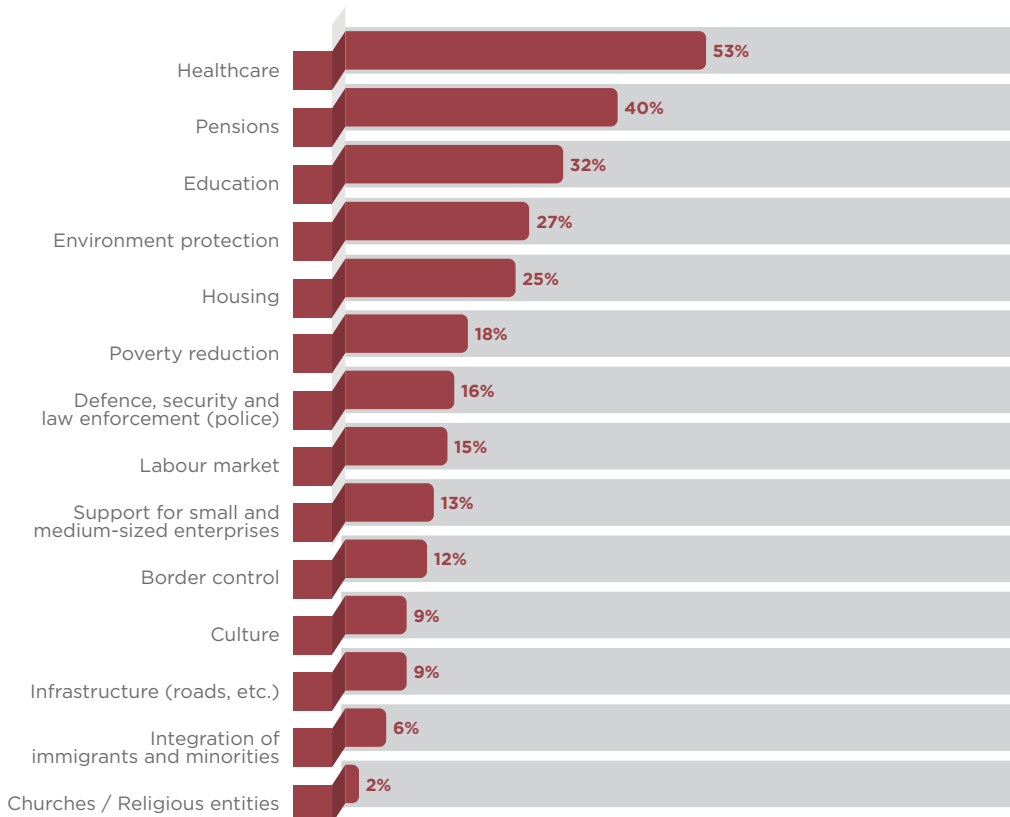
The majority of Swedish (55%) and German (54%) citizens want their government to spend more on pensions. This shows that even in traditional welfare states, pensions are a key concern.



The issue of education and environment protection also figured prominently in EU14, coming in third and fourth place, respectively. Romanians are clearly the least satisfied with the quality of their education, with 58 per cent of respondents indicating that the government should treat this as a priority area.



On which of the following policy issues do you think your national government should spend more money? (EU14. Select up to 3)

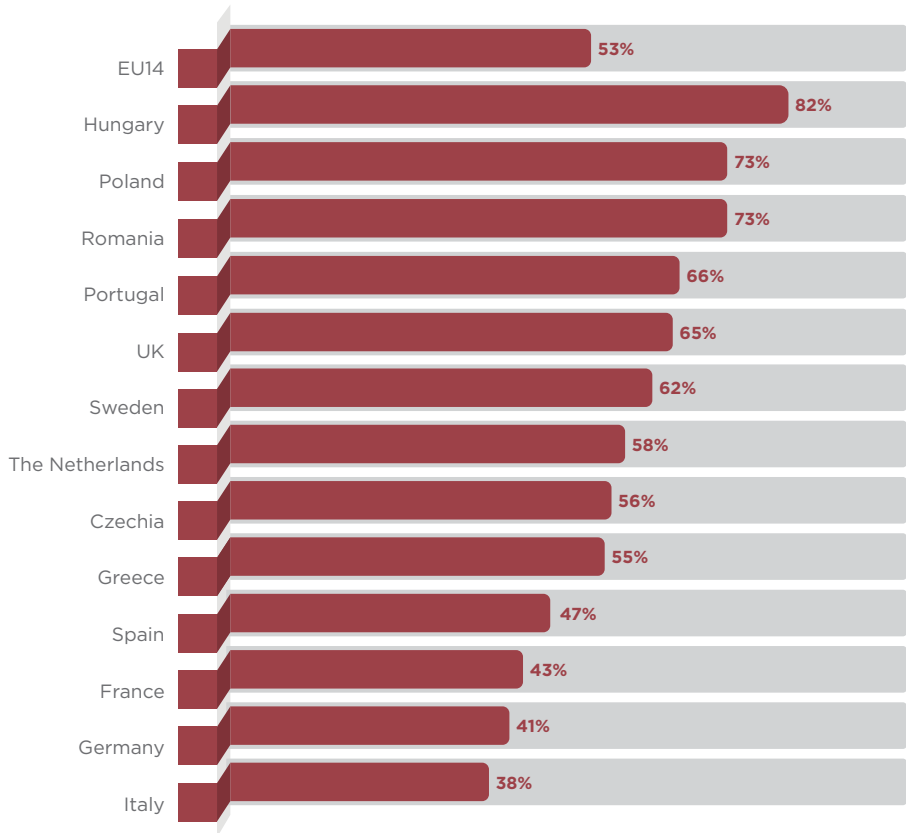




HEALTHCARE COMES FIRST

The results clearly show that healthcare ranks at the top of citizens' priorities in the EU14, with over half of respondents (53%) selecting this option.

*On which of the following policy issues do you think your national government should spend more money?
Percentage of those who chose "healthcare"*



There was near universal consensus in three Central and Eastern European countries – Hungary, Poland and Romania – that their respective healthcare systems need public investment. Four-fifths of Hungarians (82%) and three-quarters of Poles and Romanians ranked improving the healthcare system amongst their most pressing needs.

Concerns about the state of healthcare were also high in Portugal and the United Kingdom. Brexit likely impacted this result amongst Brits since Leave supporters made the financial insecurity of the National Health System (NHS) a key message of their campaign.²²

At the end of this list are Spain, France, Germany and Italy. All four countries are known for their high-performing health systems in international rankings.²³ This may explain why residents of these countries do not see a pressing need for more public spending on health.

²² Independent. 2018. British public still believe Vote Leave '€350million a week to EU' myth from Brexit referendum. [ONLINE] Available at: <https://www.independent.co.uk/news/uk/politics/vote-leave-brexit-lies-eu-pay-money-remain-poll-boris-johnson-a8603646.html>. [Accessed 3 December 2019].

²³ World Health Organisation. 2000. Measuring Overall Health System Performance for 191 Countries. [ONLINE] Available at: <https://www.who.int/healthinfo/paper30.pdf>. [Accessed 3 December 2019].

“Education came in third place, with every third respondent indicating that schools and universities should receive more funding.”

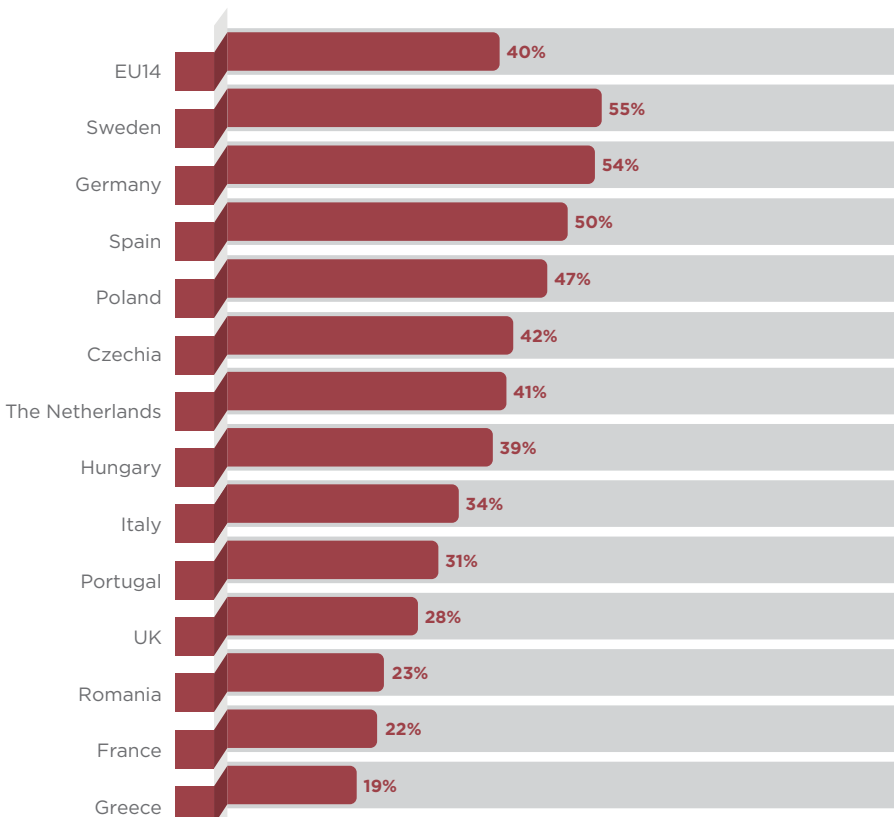


PRIORITISE PENSIONS

Lagging just slightly behind healthcare we find pensions; 40 per cent of respondents would like to see their governments spend more in this area.



On which of the following policy issues do you think your national government should spend more money?
Percentage of those who chose “pensions”



This preference was highest in Sweden (55%) and Germany (54%), where over half of respondents selected this option. It was similarly popular in Spain (50%) and Poland (47%). In the latter, the Polish government’s plan for a major hike in pensions in 2019 may have influenced this result.

Amongst those least concerned about pensions were three countries that have extremely different pension systems: Romania (23%), France (22%)²⁴ and Greece (19%).

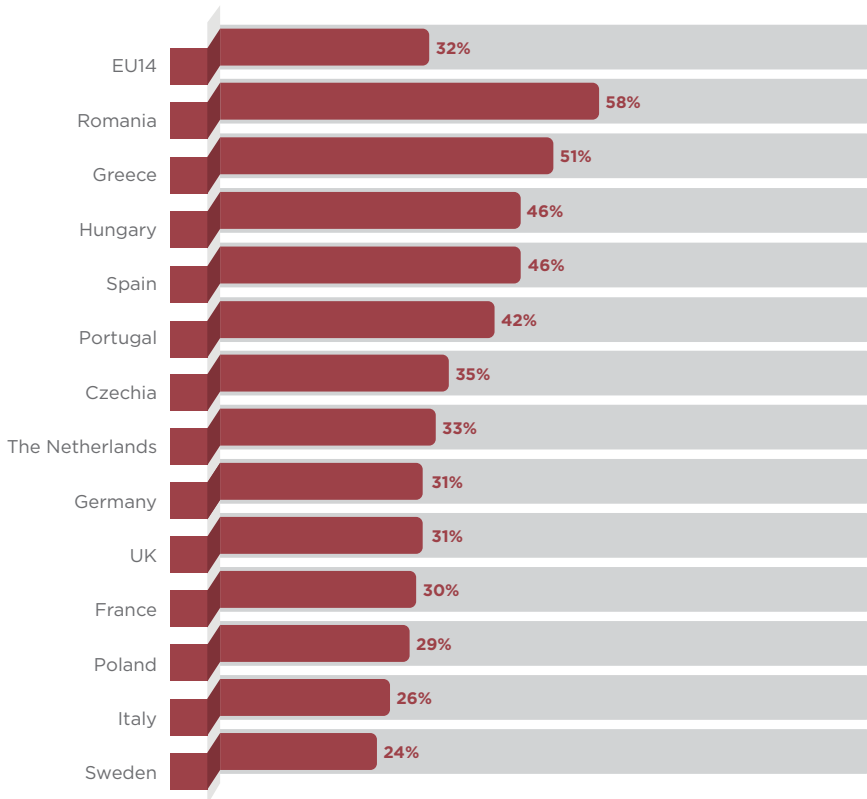


EDUCATION FOR THE FUTURE

Education came in third place, with every third respondent (32%) indicating that schools and universities should receive more funding.

Romanians are clearly the least satisfied with the quality of their education, with 58 per cent of respondents indicating that the government should treat this as a priority area. It should be noted that amongst the 28 Member States, Romania spends proportionally the least on education.²⁵

On which of the following policy issues do you think your national government should spend more money?
Percentage of those who chose "education"



²⁴ Data was collected in July-August 2019, before demonstrations against the pension reform in France.

²⁵ European Commission, Eurostat. 2018. Government expenditure on education. [ONLINE] Available at: https://ec.europa.eu/eurostat/statistics-explained/index.php/Government_expenditure_on_education. [Accessed 3 December 2019]

We also find Hungary (46%) amongst the countries where citizens want the state to spend more on education. The quality of Hungarian education has recently slipped in rankings, a fact that opposition parties have seized on.²⁶

In the south, education was also a clear priority for investment as seen in Greece (51%), Spain (46%) and Portugal (42%). Italy proved a southern outlier (26%). At the very end of the list was Sweden (24%), which is world renowned for its efficient education system.

NOT A MAJOR TAXPAYER PRIORITY

Respondents showed far less interest in spending their hard-earned money on areas beyond healthcare, pensions and education.

The environment and housing received roughly the same number of mentions, with both policy areas weighing on the minds of roughly every fourth respondent. Interest was also low for poverty reduction (18%), military and defence (16%), the labour market (15%), support for SMEs and border control (12% each).

Just 9 per cent of respondents would spend more on subsidising culture or infrastructure respectively. Six per cent wanted more state investment in the social integration of immigrants and other minorities, and a mere 2 per cent believed that churches should be given more state funding.



²⁶ OECD. 2018. Hungary Student performance (PISA 2018). [ONLINE] Available at: <https://gpseducation.oecd.org/CountryProfile?primaryCountry=HUN&treshold=10&topic=PI>. [Accessed 3 December 2019].



DREAMS FOR UNIVERSAL BASIC INCOME

HALF OF EUROPE SUPPORTS IT

The economic and political turbulence that has rocked Europe in recent years has brought the idea of establishing a tax-payer funded universal basic income (UBI) to the fore. This policy would benefit all citizens, regardless of their income or employment status. Our survey shows that support for UBI is mixed as citizens still have much to learn about its real-life application.

HIGHLIGHTS



With the strongest support for UBI in Germany, political parties and policymakers there may find it a safer environment to trial programmes.

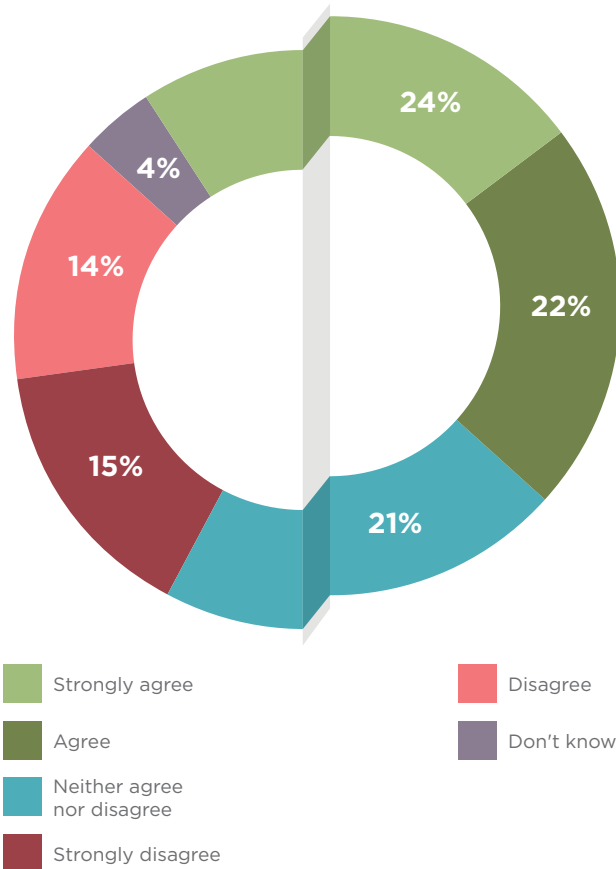


Given UBI's unpopularity in Eastern and Southern Europe, it is unlikely to become part of European Union's social policy in the near future.



One of every fourth respondent (25%) did not have an opinion about UBI, which suggests the public still has much to learn about this policy and its application.

Do you agree or disagree that each citizen, including those in work, should receive a guaranteed income from the state without work requirement? (EU14)



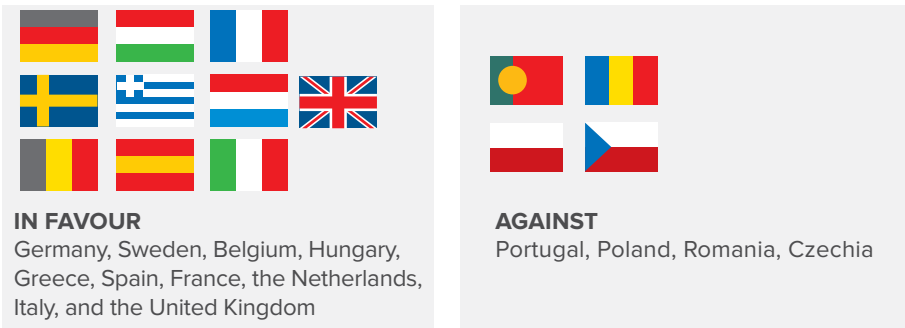


PLURAL SUPPORT

Across the EU14 a plurality of citizens support the idea of universal basic income. Respondents who fully agree (24%) and are somewhat supportive (22%) led to a combined total of 46 per cent. Those who are fully opposed (15%) and somewhat opposed (14%) were 29 per cent of the total sample.

At the Member State level, support for UBI is highest in Germany (62%) and lowest in Portugal (35%). These numbers are in line with our previous survey results that showed currently Portuguese have greater faith in the promise of hard work and entrepreneurship than Germans.

The split of countries in favour or against UBI can be seen below.



Whilst no significant regional trends emerged, we did note some commonalities amongst Central and Eastern European countries. Whilst the proposal is popular in Hungary, it is less so in all other eastern Member States.



“Across the EU14 a plurality of citizens support the idea of universal basic income.”



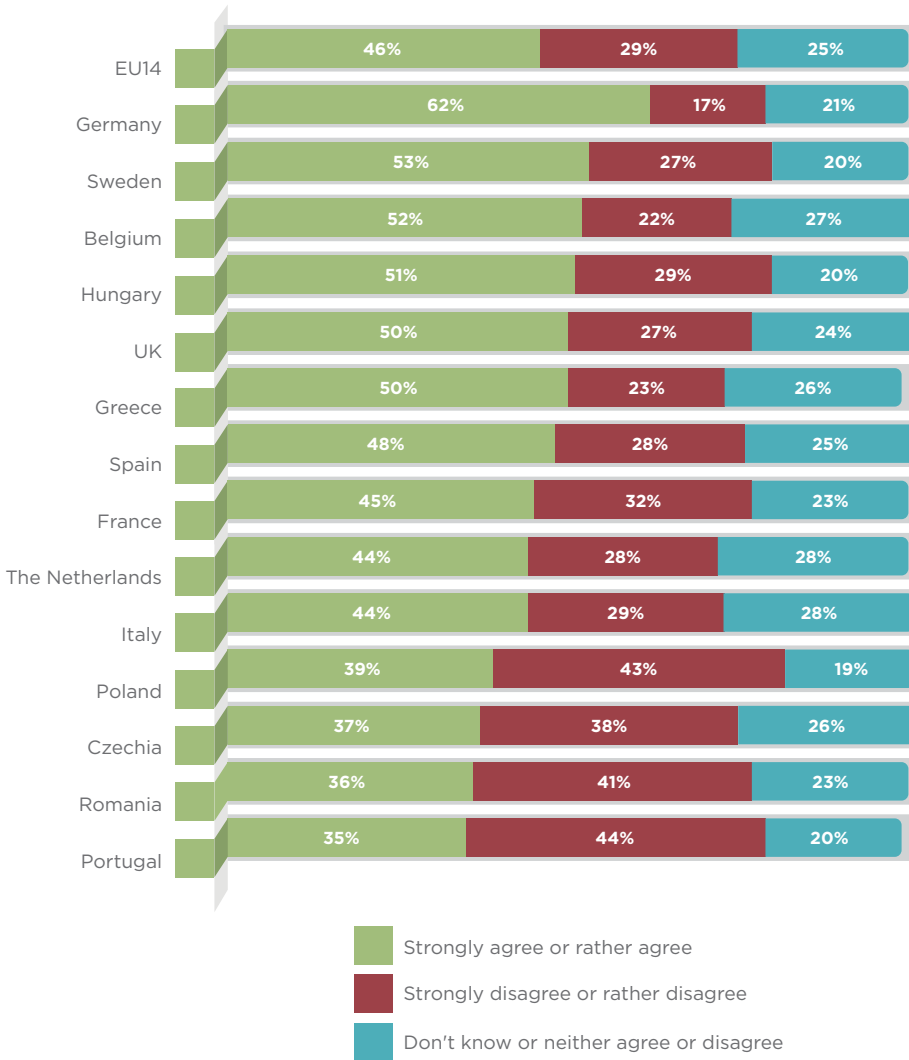
OPINIONS ARE STILL FORMING

The public is only just beginning to form opinions on this matter. Awareness is largely driven by the media with attention-grabbing headlines capturing the public’s imagination as politicians warily enter the debate.

This burgeoning understanding about UBI’s meaning and real-life application is reflected in the largely even spread of responses across the agree to disagree spectrum. It is also seen in the fact that every fourth respondent (25%) did not have an opinion about or have mixed feelings toward UBI.

Yet, there were some outliers. The Poles emerged as the most opinionated; just 19 per cent reported no point of view. The Dutch and Italians were the most hesitant with only 72 per cent passing a judgement.

Do you agree or disagree that each citizen, including those in work, should receive a guaranteed income from the state without work requirement? (EU14)



MIXED RESULTS IN FINLAND

Finland is one of the Member States where the government has trialled universal basic income. From January 2017 until December 2018, about 2,000 unemployed Finns received a monthly flat payment of 560 euros. The aim was to determine if a guaranteed safety net would help unemployed people find jobs.

The Finish government has since stopped the programme. Whilst some people did find jobs, they were no more likely than those in the control group who were not given any money. However, participants in the trial did report feeling happier and less stressed. Trials in other countries have shown that UBI can boost health and reduce crime.²⁷

²⁷ World Bank. 2019. Exploring Universal Basic Income. [ONLINE] Available at: <http://documents.worldbank.org/curated/en/9933911574784667955/pdf/Exploring-Universal-Basic-Income-A-Guide-to-Navigating-Concepts-Evidence-and-Practices.pdf> [Accessed 30 December 2019].



DREAMS FOR SALARY

SEEKING SALARY TWICE THE MINIMUM WAGE

Who would not aspire for higher wages if asked? Even if the standard is only modestly set to “live a comfortable life”. It turns out that people in rich and poor EU14 countries answer this question very differently. No matter what, they all dream for more - about twice their minimum wage according to our survey.²⁸

²⁸ Since there is no legally mandated minimum wage in Italy or Sweden, we only calculated the average amounts of the other twelve countries.

HIGHLIGHTS



People in rich countries dream small compared to those in poor countries on the wage required to live a comfortable life.



The median dream wage across the EU14 is about twice the minimum legal standard in each country.

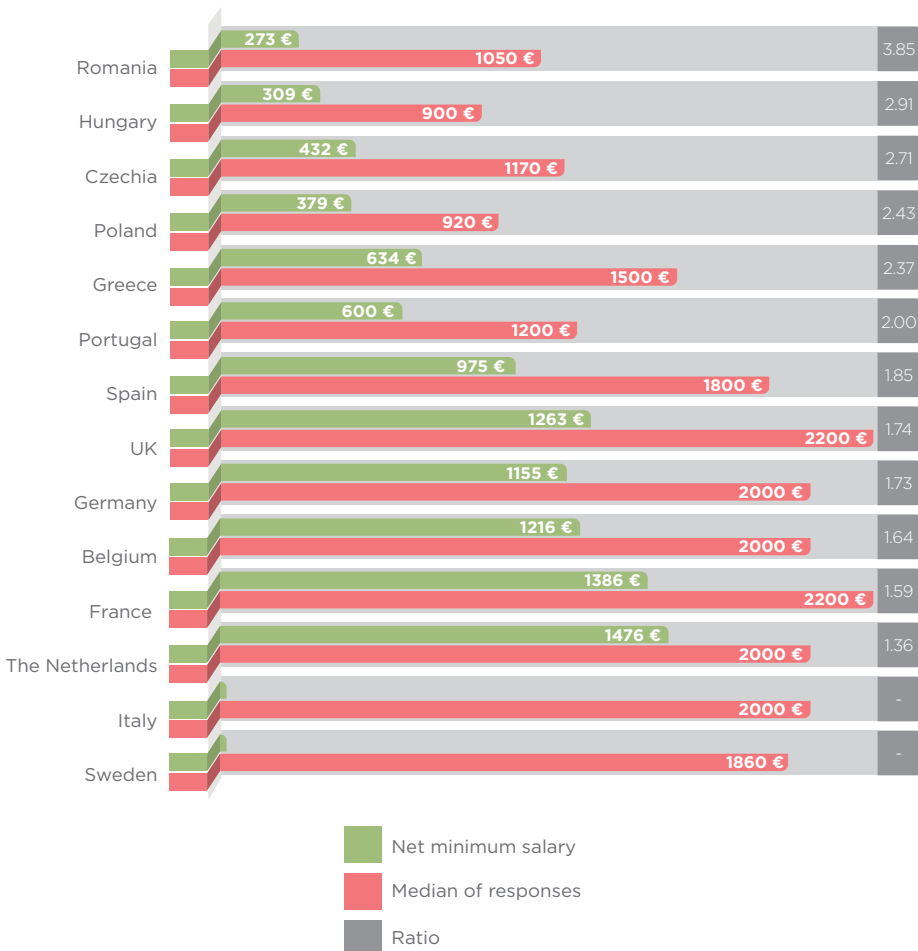


Western Europe → net 2,000 € - 2,200 € per month

Southern Europe → net 1,200 € - 1,800 € per month

Central and Eastern Europe → net 900 € - 1,170 € per month

What is the minimum monthly net sum that would be necessary for you personally to live a comfortable life?²⁹



²⁹Analyze Economic. 2018. Minimum salaries in Europe. [ONLINE] Available at: <http://www.analizeeconomic.ro/2018/02/ce-salarii-mini-me-brute-si-nete-se.html>. [Accessed 3 December 2019].



THE RICH DREAM SMALL

Respondents in rich EU14 countries aspired to a monthly wage much closer to their real median income compared to poorer countries. In other words, people in richer Member States are dreaming small compared to their poorer counterparts on the wage required to live a comfortable life.

We found this gap declined in parallel with the increasing value of the minimum wage in the country. Germans dreamed of a monthly salary of 2,000 euros, which is quite close to their real rate. The figure represents just 1.73 times the German net minimum wage (1,155 €). The Belgians appeared even more content, dreaming at just 1.64 times their legal minimum.

Yellow Vest protesters in France may be demanding higher wages, but French respondents in our survey demonstrated more modest ambitions. Their dream monthly wage was just 1.59 times the minimum (1,386 €). In the Netherlands, respondents dreamed at just one and a half times (1.36) their legal requirement.

Amongst rich countries, the Brits were the most ambitious. They dreamed of a monthly salary at 1.74 times their legal minimum. This figure may reflect the especially high-income inequality and high cost of living in the United Kingdom.

In the two countries without a minimum legal wage, the ideal monthly salary was very similar: Sweden (1,860 €) and Italy (2,000 €).



“People in richer Member States are dreaming small compared to their poorer counterparts on the wage required to live a comfortable life.”

DREAM WAGES BY REGION

(Figures for net monthly wages)

While in Europe's east and south respondents dreamed of a wage about 2.5 times the legal minimum, in the west ratios were more commonly 1.4 to 1.7 times the legal minimum. The dream salary in France (2,200 €) is more than twice the ideal wage in Hungary (900 €).

Western Europe : net 2,000 € - 2,200 €

Southern Europe: net 1,200 € - 1,800 €

Central and Eastern Europe: net 900 € - 1,170 €



THE POOR DREAM BIG

Amongst the poorer EU14 countries, respondents had much more ambitious dreams for income to live a comfortable life. This likely reflects their low-level legal minimums and the increasing convergence of living costs with the European Union.



ONE EU14 AVERAGE

Despite the rich-poor divide on this score, we can still determine a median dream wage across the EU14. On this score, the average amounts to about **2X** the minimum legal standard in each country.

Who were the biggest dreamers? Romanians. The Romanian dream is 3.85 times their minimum wage (273 €), which is the lowest legal standard amongst the countries surveyed. This dream wage would amount to 1,050 euros monthly.

Respondents were similarly ambitious in other Central and Eastern European Member States. The Hungarian dream was 2.91 times the minimum wage (309 €), amounting to 900 euros monthly. The Czech dream was 2.71 times the minimum wage, whilst the Poles dreamed slightly less at 2.43 times.

Southern Europe saw a mix of aspirations. In line with the economic development of the country, Greeks dreamed of a wage 2.37 times their minimum standard, whilst the Portuguese aimed for twice as much as their status quo. The Spanish had the most modest ambitions in the region at just 1.85 times their minimum.



DREAMS FOR RETIREMENT AGE

AGE 60 IS THE GOLDEN YEAR OF CHOICE

As Europe's population balloons in age with higher life expectancies and lower birth rates, pension systems are coming under unprecedented stress. Many governments have raised the retirement age in response, and more are planning similar moves. Predictably, our survey shows this is deeply unpopular. On average the EU14 have their sights set on an even lower, not higher golden year: age 60.

HIGHLIGHTS



Even in the countries where the retirement age is already high, respondents would prefer to stop work around age 60 to 61.

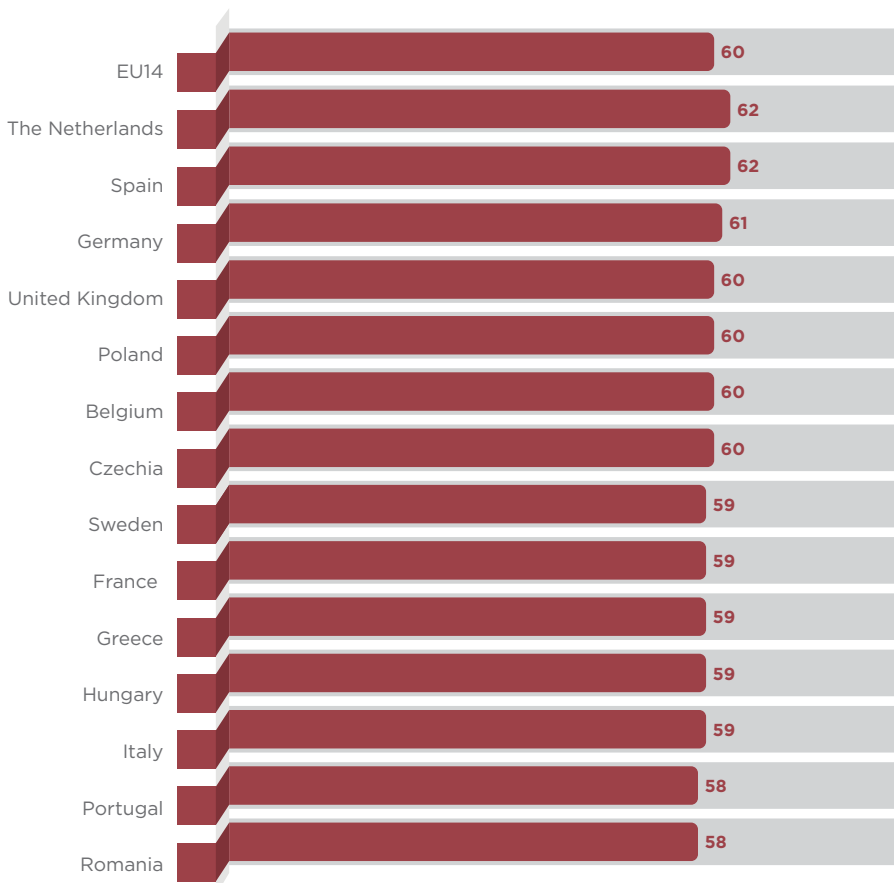


In countries where the retirement age is under 65, respondents would prefer to stop working before the age of 60.



Central and Eastern European citizens had more realistic dreams for retirement, aligning closer with the law. Polish respondents, for example, dreamed of retiring at the age of 60, which coincides exactly with the actual retirement age for women

What do you think should be the minimum retirement age in your country? (Mean of responses)





THE GOLDEN AGE OF 60

Policymakers in Brussels have yet to seriously attempt to establish a common European age for retirement. Yet, should this effort come about, our survey offers a starting point from the EU14 perspective.

Age 60 was revealed as the golden age for retirement, a threshold reached by averaging together the results in the countries surveyed.

Today, the only Europeans that enjoy retirement at age 60 are women in Poland and Austria. The most common retirement age in the EU is 65 with most governments seeking to raise - not lower - this threshold, in some states as high as 68 (Britain and Ireland).

In countries where the retirement age is already as high as 67,³⁰ respondents dreamed of withdrawing from work at around 60 to 61 years. Where the retirement age is under 65, respondents opted to stop slightly earlier before the age of 60.

Who dreamed of retiring the earliest? Romanians at 58 years. The Dutch opted to stay at work the longest, setting their sights on 62.

TRENDING UPWARDS AND ONWARDS

In many Member States, public pensions have become the largest single budget item – bigger than health, education or defence spending.³¹ Countries including Spain, Italy, Belgium and Germany have responded by seeking to raise their retirement age as high as 67 years. Greece and Sweden have already reached this standard.

The retirement age differs for men and women in some Member States. Traditionally the age for women has been lower than for men, but policy is moving toward greater gender parity. Although retirement ages have been officially raised in many countries, it does not necessarily result in actual retirement. Many workers choose to stay on the job for years more whilst others simply cannot afford to stop work. An increasing number find new employment as a “second act” in their golden years.



SOUTHERN DREAMS OF EARLY RETIREMENT

Europeans on average dreamed of retirement roughly 4 to 5 years before the official age in their countries. But there were some countries where the gap between people's dreams and the reality of the law were even more pronounced.

³⁰ Finnish Centre for Pensions. 2019. Retirement ages in different countries. [ONLINE] Available at: <https://www.etk.fi/en/the-pension-system/international-comparison/retirement-ages/>. [Accessed 3 December 2019].

³¹ Financial Times. 2012. Europe's retirement ages in the spotlight. [ONLINE] Available at: <https://www.ft.com/content/22c416b8-57ec-11e1-ae89-00144feabdc0>. [Accessed 3 December 2019].

PREDICTABLE UNREST IN FRANCE

Faced with unrelenting protests over proposed changes in France's generous pension system, officials withdrew a move in January 2020 to raise the full-benefit retirement age to 64 from the present 62.³² The social unrest seen in France was a predictable result based on our survey. The French would prefer to retire even earlier - not later - at age 59.

Portuguese respondents dreamed of retirement at 59 years, which is about seven years earlier than their legal standard (66 years). Greece saw a similar eight-year divide, with respondents dreaming of retirement at age 59. During its debt crisis in 2015, Greece raised the retirement age to 67 for both men and women.

Italians too dreamed of retirement at age 59. But Italian law requires that men wait until age 66, while women can retire at 63.

“Europeans on average dreamed of retirement roughly 4 to 5 years before the official age in their countries.”



MORE REALISTIC IN THE EAST

Countries in the eastern half of the continent had more realistic dreams for retirement, aligning closer with the law. In Hungary, the preferred age was 59 years, which is roughly three years lower than their standard (62 years).

Polish respondents dreamed of retiring at the age of 60, which coincides exactly with the actual retirement age for women (60). Since Polish men have to wait until age 65, their dreams are not such a perfect match with reality.

In Czechia, men can retire at age 63, while women (depending on their number of children) can elect to stop work between 58 years and 62 years. The average age indicated by Czechs was even less at 60 years.



³² France24. 2019. Why France's 'unsustainable' pension system may well be sustainable. [ONLINE] Available at: <https://www.france24.com/en/20191223-why-france-s-unsustainable-pension-system-may-well-be-sustainable>. [Accessed 31 December 2019].



CONCLUSION

THE EUROPEAN DREAM IS... EUROPE ITSELF

Our survey reveals that the European dream is... Europe itself. Citizens do not long to move to another continent or outside the European Union. They do not want to give up their democracies or individual liberties. Rather than weaken the European welfare model, they want to strengthen it.

Wealth and prosperity matter, but not at the expense of quality of life. As the famed economist, Jeremy Rifkin has said, "The American dream may be worth dying for. The new European dream is worth living for".³³

Whilst the European dream is Europe itself, it is not necessarily Europe as it is today. Respondents were pessimistic about the life chances for future generations and showed diminishing faith in the promise of hard work to achieve prosperity. These are clearly not aspirational sentiments, and should raise concern amongst policymakers.

Values also appear to be changing, we suspect in response to the migration crisis and nationalist movements that have surged in recent years. Security and homogeneity were values almost as important to respondents as freedom and diversity. At the same time, the role of the family has increased in this unpredictable world. In the Future of Europe debates, these are the issues that also warrant attention.

Europeans showed a longing for the idea of Europe as it was three to four decades ago. A democratic Europe. A Europe of welfare states. A Europe of prosperity and opportunity for all. A stable and safe Europe. This is the European dream - unique to this continent and its history - that should inform and inspire the Future of Europe.

³³ Rifkin, J. (2005). *The European Dream: How Europe's Vision of the Future Is Quietly Eclipsing the American Dream*. New York: Tarcher/Penguin

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The Foundation for European Progressive Studies (FEPS) is the think tank of the social democratic political family at the European level. Our mission is to develop innovative research, policy advice, training and debates to inspire and inform progressive politics and policies across Europe. We operate as hub for thinking to facilitate the emergence of progressive answers to the challenges that Europe faces today.

FEPS works in close partnership with its members and partners, forging connections and boosting coherence amongst stakeholders from the world of politics, academia and civil society at local, regional, national, European and global levels.

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Policy Solutions is a progressive political research institute based in Budapest. It is committed to the values of liberal democracy, solidarity, equal opportunity and European integration. Amongst the pre-eminent areas of its research are the investigation of how the quality of democracy evolves, the analysis of factors driving euro-scepticism and the far-right, and election research.

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What is the European Dream?

Survey on European Dreams for the Future of Europe

The founders of the European project were dreamers. They dreamed of a united Europe: a continent of peace, solidarity, and shared prosperity. A Europe without borders and divisions that celebrates the continent's incredible diversity. A Europe evolving towards an ever-closer union, inspired by the notion that Europe will always be stronger together.

Do Europeans today share the founders' dream?

Together, **FEPS** and **Policy Solutions** set out to reply to this question with a landmark survey covering the 14 most populous Member States. Our research defines the European dream by providing insights on the hopes and expectations EU citizens have for Europe as a shared project.

As policymakers debate the Future of Europe, hoping to make the EU more responsive to the views and needs of citizens, this research takes on especially strong importance. Democracy works best when everyone is heard. This survey shares the people's voice. We all need to hear it.

FEPS is the think tank of the social democratic political family at EU level. Our mission is to develop innovative research, policy advice, training and debates to inspire and inform progressive politics and policies across Europe. We operate as hub for thinking to facilitate the emergence of progressive answers to the challenges that Europe faces today.

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Authors:

Dániel BARTHA, Tamás BOROS, Maria FREITAS,
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