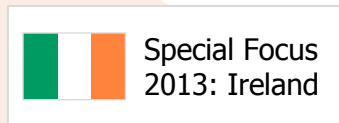


# Challenges of Europe 2013



## Challenges of Europe 2013

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## Challenges of Europe 2013

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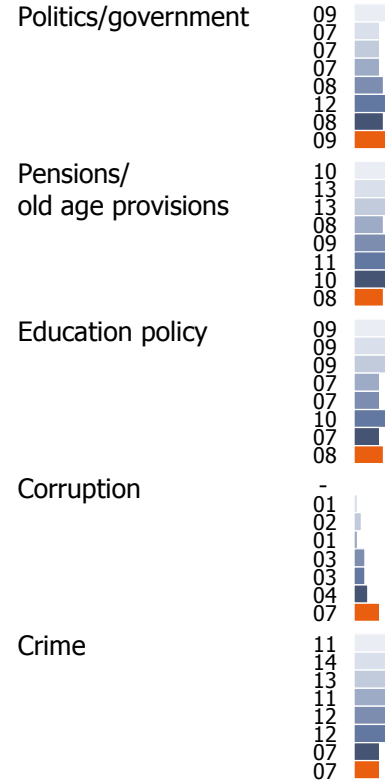
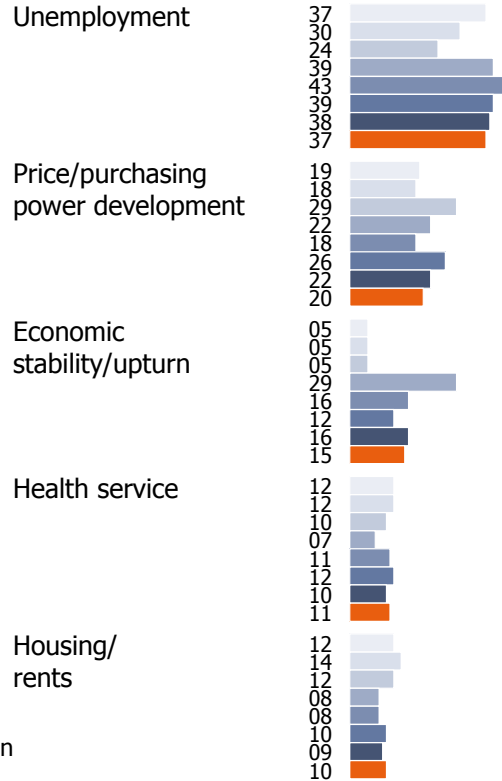
# Challenges of Europe - Top 10

Summary of all countries; weighted by population; (unaided replies; in %; rounded; multiple responses possible)

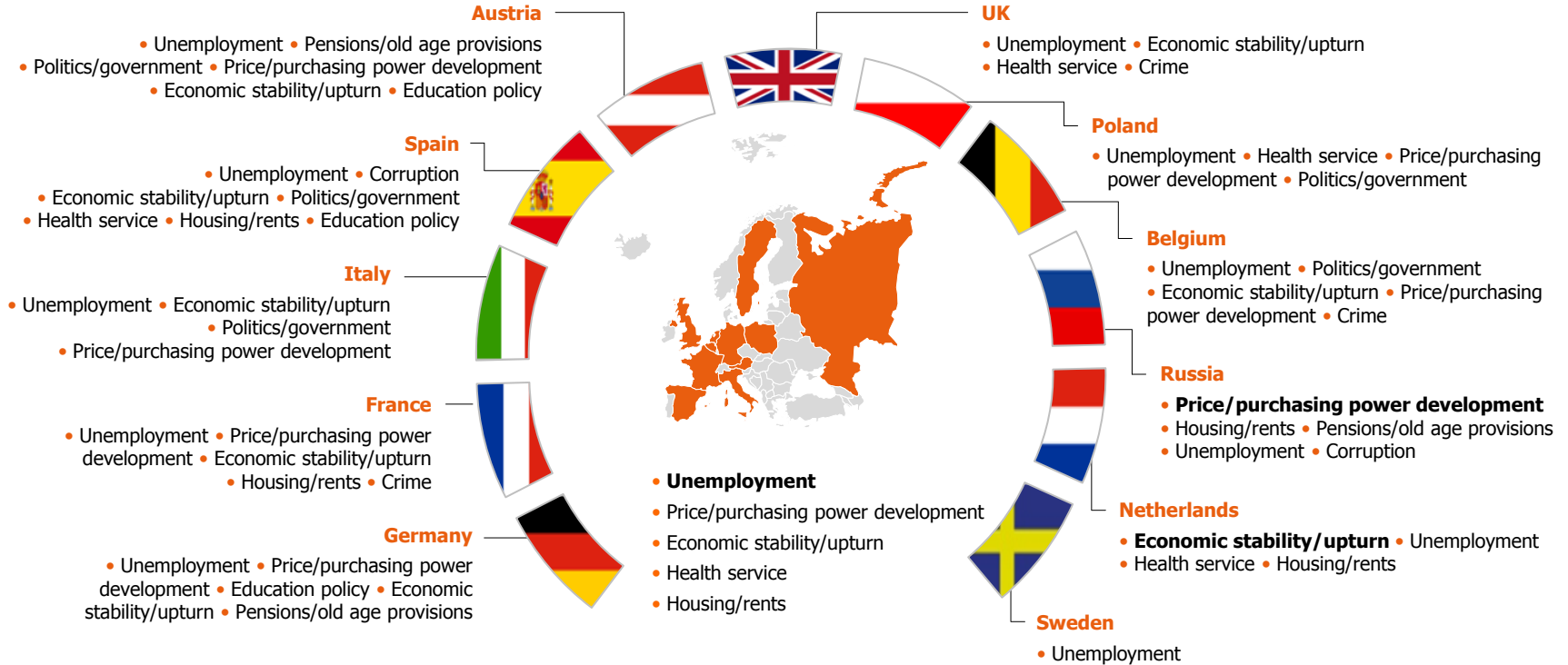


- 2006
- 2007
- 2008
- 2009
- 2010\*
- 2011
- 2012
- 2013

\* since 2010 incl. Sweden  
Base 2013: 13,315 resp.



# Main concerns of the Europeans at a glance\*



\* Concerns mentioned  $\geq 10\%$ , based on the "top 10 challenges" in Europe/ in clockwise direction: Germany mentioned the most concerns, Sweden the least

# Top 10 Challenges - a European comparison

(unaided answers; in %; rounded; multiple responses possible)



Total



Unemployment	37	32	69	52	72	28	24	58	28	11	16	33
Price/purchasing power development	20	29	21	11	2	13	8	23	13	31	3	2
Economic stability/upturn	15	16	14	31	27	12	19	8	16	6	21	7
Health service	11	7	7	9	14	7	17	24	3	8	14	8
Housing/rents	10	3	11	1	14	2	5	2	3	22	11	2
Politics/government	9	7	5	22	16	13	6	11	21	3	6	2
Pensions/old age provision	8	14	8	5	2	15	2	6	4	13	4	2
Education policy	8	16	8	3	10	10	9	3	3	7	5	9
Corruption	7	1	0	8	27	8	0	2	1	11	0	-
Crime	7	8	10	9	2	6	10	2	10	4	9	1

Total

Germany

France

Italy

Spain

Austria

UK

Poland

Belgium

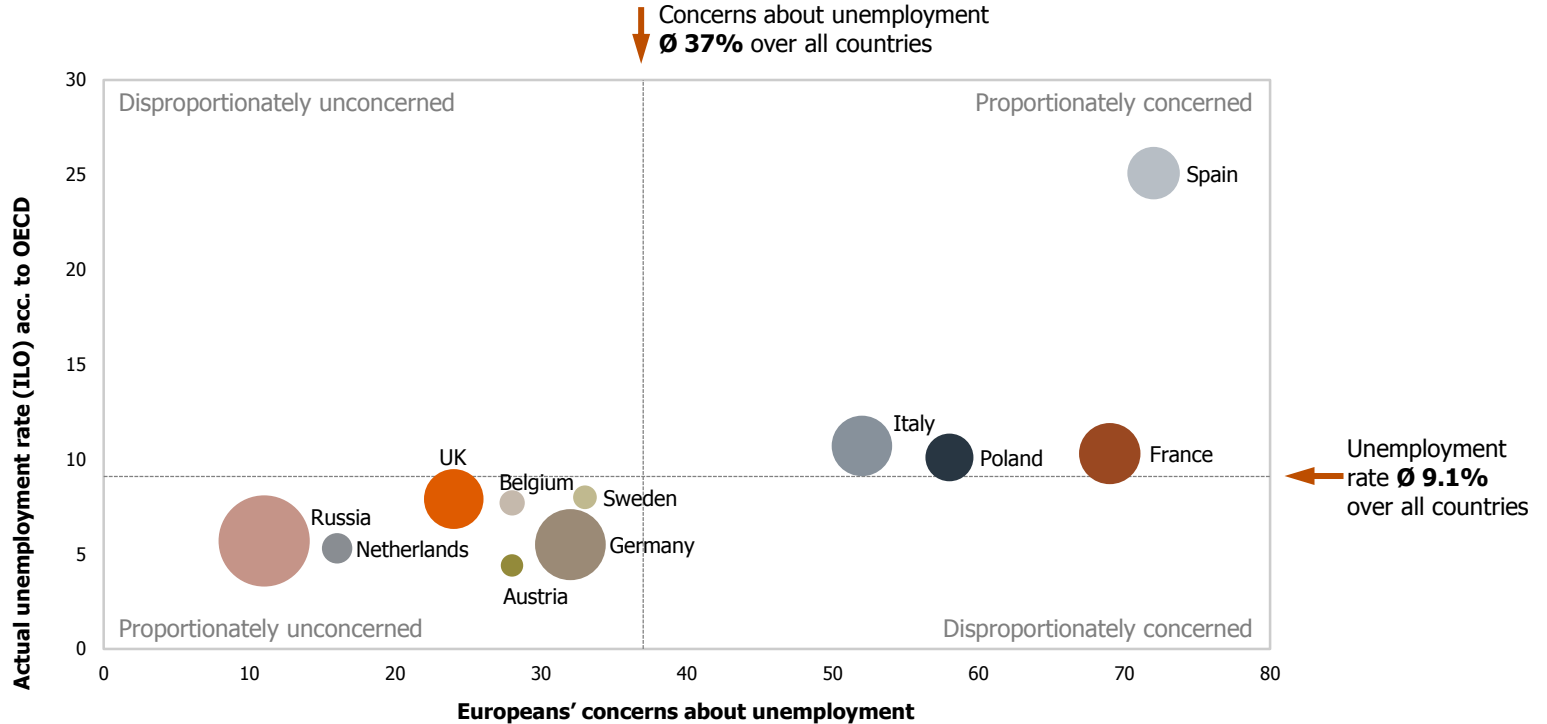
Russia

Netherlands

Sweden

# Comparison of Europeans' concern about unemployment with the actual unemployment rate (ILO) in %

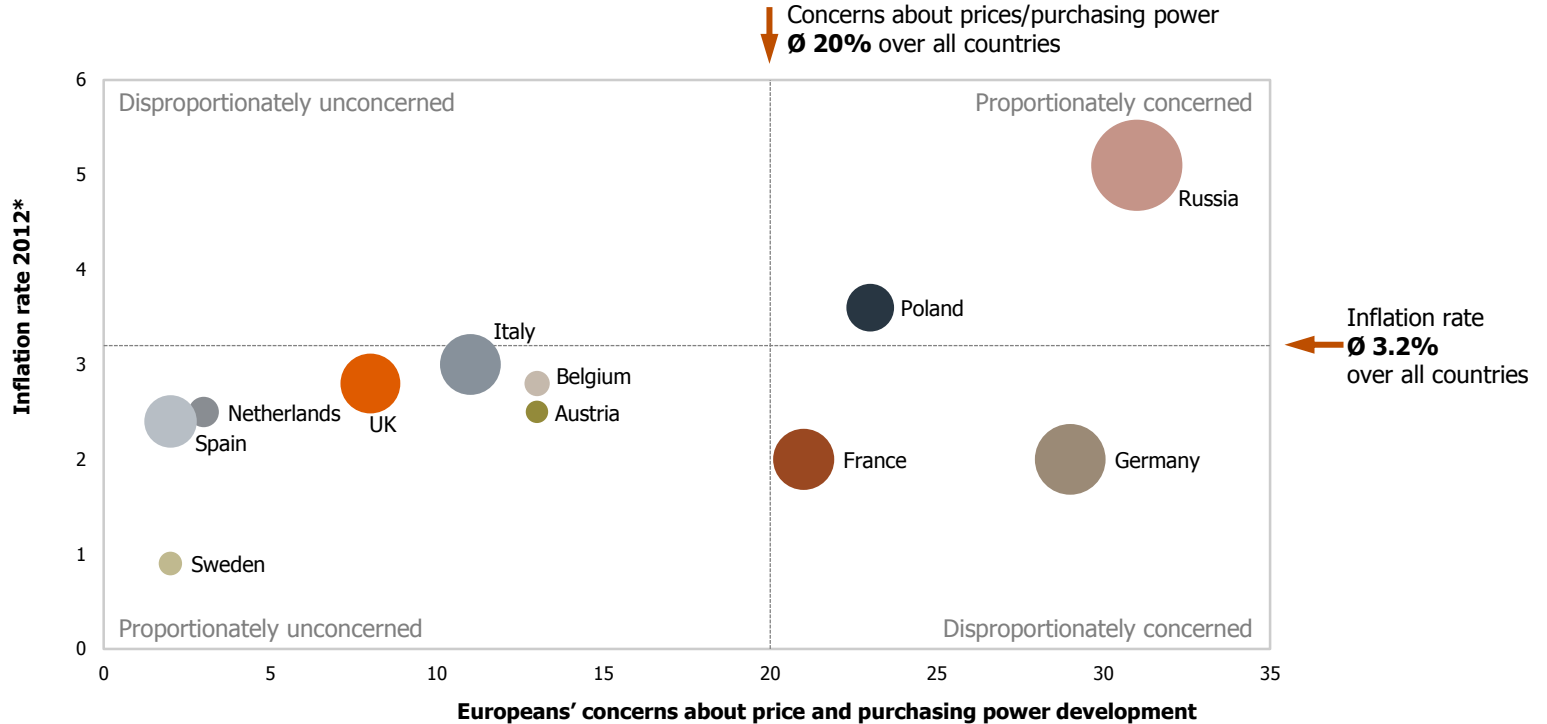
(Concerns about unemployment: unaided answers; in %; rounded; multiple responses possible)



Size of dots represents proportion of population  
\*OECD, as in April 2013

# Comparison of Europeans' concern about price and purchasing power development with the actual inflation rate in %

(Concern about price/purchasing power development: unaided answers; in %; rounded; multiple responses possible)

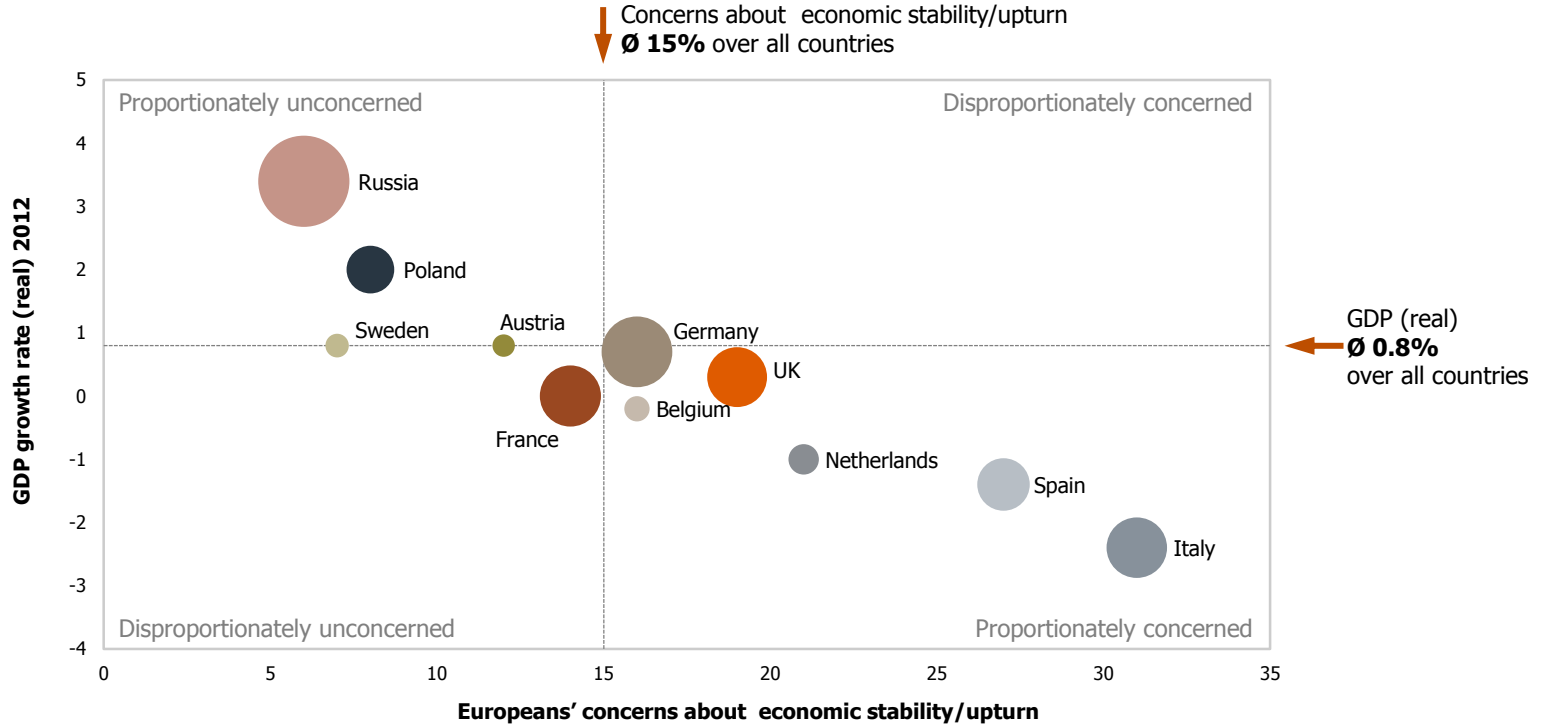


Size of dots represents proportion of population  
\*EUROSTAT, as in April 2013



# Comparison of Europeans' concern about economic stability/upturn with the actual GDP growth rate (real) in %

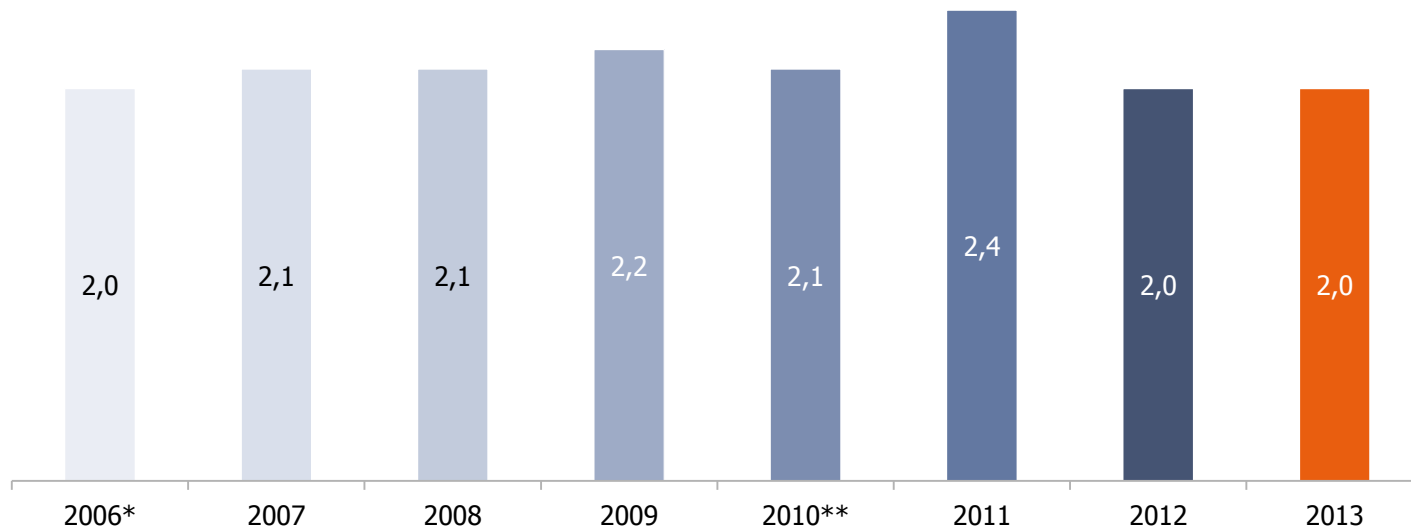
(Concern about economic stability/upturn: unaided answers; in %; rounded; multiple responses possible)



Size of dots represents proportion of population  
\*OECD, as in April 2013

## Variety of problems

Number of problems mentioned per person; summary of all countries; weighted by population of the countries



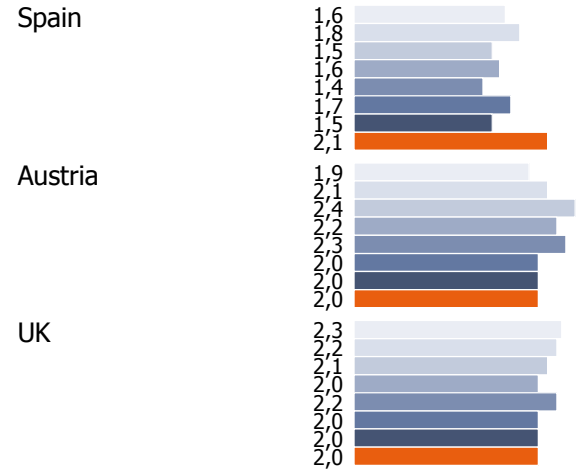
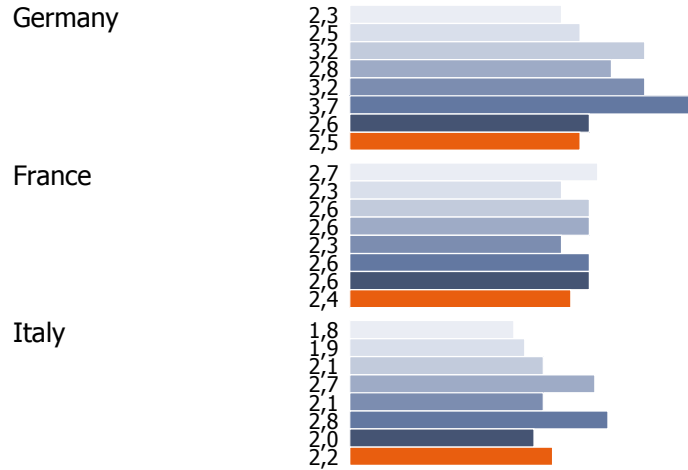
\* since 2006 incl. Belgium; \*\* since 2010 incl. Sweden  
Base 2013: 13,315 resp.

# Variety of problems – a European comparison (1)

Number of problems mentioned per person and country



- 2006
- 2007
- 2008
- 2009
- 2010
- 2011
- 2012
- 2013



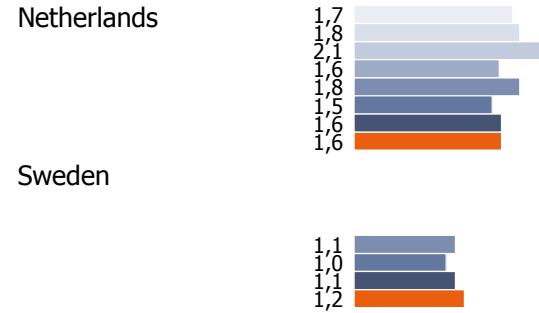
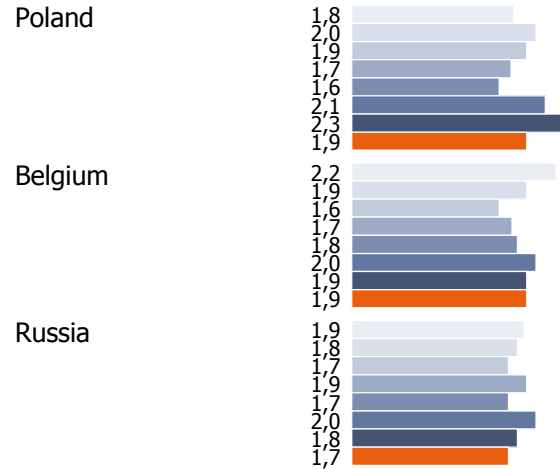
Base 2013: 13,315 resp.

# Variety of problems – a European comparison (2)

Number of problems mentioned per person and country



- 2006
- 2007
- 2008
- 2009
- 2010
- 2011
- 2012
- 2013



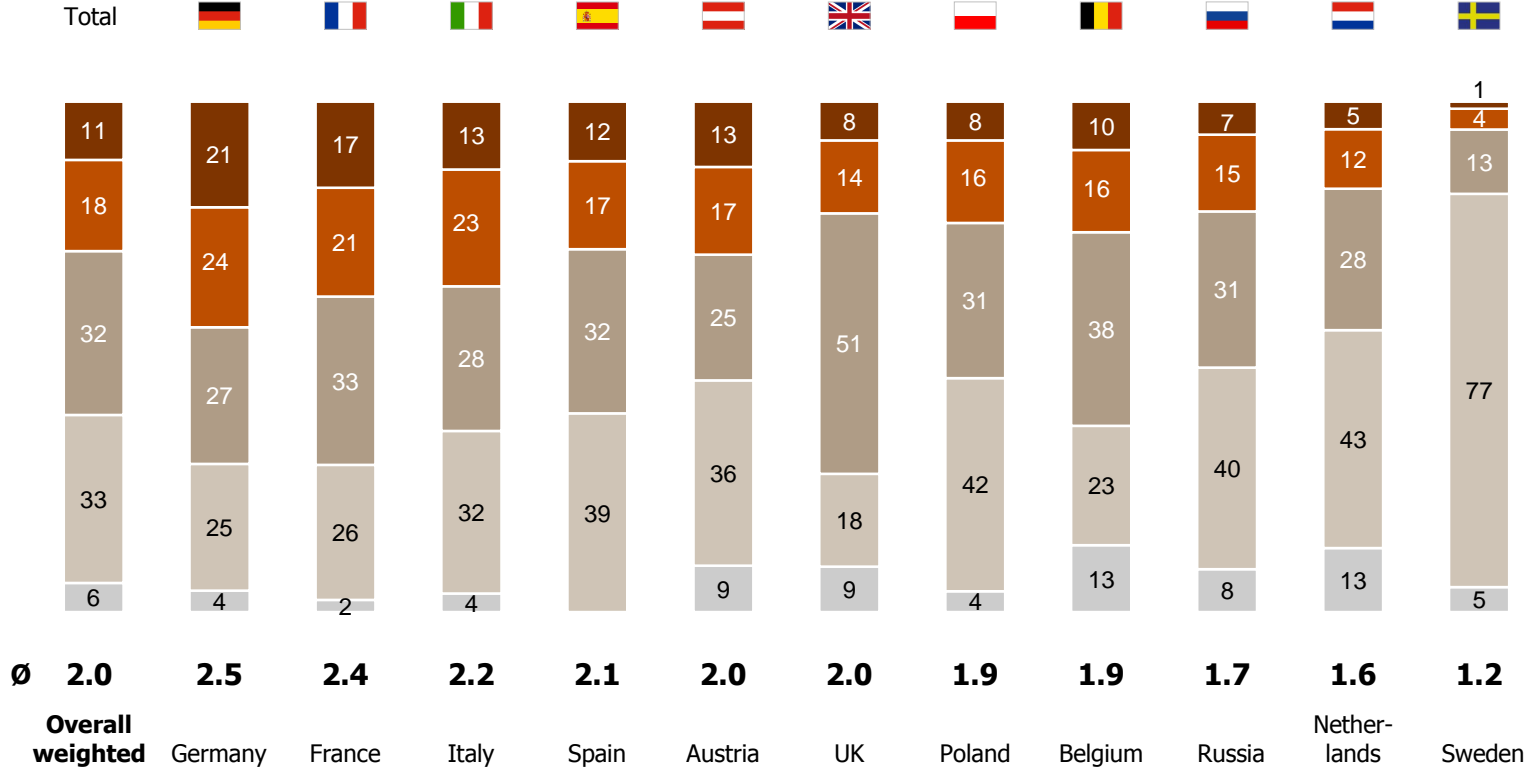
\* since 2006 incl. Belgium; \*\* since 2010 incl. Sweden  
 Base 2013: 13,315 resp.

# Variety of problems – a European comparison (3)

Number of problems mentioned per person and country in %



- 4 and more responses
- 3 responses
- 2 responses
- 1 response
- No answer



Base:  
13,315 resp.

## Europe – main results (1)



Since 2010, the **scope** of the “Challenges of Europe” survey comprises 11 European countries: Germany, France, Italy, Spain, Austria, Poland, Great Britain, Belgium, Russia, the Netherlands and Sweden. 13,315 citizens in these countries were surveyed as representatives of Europe. Their answers represent the social, economic and political concerns of some 460 million people. In order to obtain a **pan-European viewpoint**, the results of the individual countries have been compiled – in weighted form – according to the respective proportion of their population.

In addition, **Ireland** has also been included in this year’s survey as a **country focus**. However, the results for Ireland will not be integrated into the pan-European overview, as this survey is taking place only in 2013.

Once again, **unemployment** tops the list of concerns as Europe’s biggest problem – as it has since the economic crisis in 2009: 37% of respondents considered the labour market situation as the biggest challenge facing their country.

So a slight but steady decline in concern is shown since 2010 across all eleven countries. The greatest concern at 72% currently dominates in Spain, followed closely by the French, who at 69% are also deeply concerned about unemployment. More than one in two citizens are worried about these problems in Poland (58%) and Italy (52%). But in Germany (32%) and Sweden (33%) only a third of respondents see the need to improve the labour market situation. Austria and Belgium are still over the 20% mark at 28% and Great Britain at 24%. Comparatively low values have been recorded in the Netherlands, and especially in Russia where only 16% and 11% respectively are currently worried about unemployment.

As was the case in the last three years, **price and purchasing power development** ranks as the second major European concern. However, for the second time in a row it has become slightly less of a burning issue with currently only 20%, as opposed to 22% in 2012.

## Europe – main results (2)



The issue has the highest priority in Russia, where one in three citizens (31%) see price and purchasing power development as a problem, which means it has first place in the list of worries there. Germany is close behind at 29%, but Poland and the French are also shown as feeling above average concern at 23% and 21% respectively. The issue plays a minor part in Austria and Belgium at 13%, Italy (11%) and Great Britain (8%). The issue is barely mentioned in the Netherlands (3%), Spain (2%) and Sweden (2%).

Also worry about **economic stability**, currently at 15% (2012: 16%), is again in third place in the European list of worries. So the issue maintains its clearly higher level by comparison with the years prior to the economic crisis, when only 5% of Europeans were worried about it. It is currently the Italians (31%) and the Spanish (27%) who think about this issue most. The economic trend takes first place however in the Netherlands at 21%. British (19%), Belgian (16%) and German (16%) respondents currently appear to feel only average concern, whereas in Germany the issue has experienced the

greatest drop at - 8 percentage points. And in Poland and Sweden (both 7%) and Russia (6%) economic stability plays a comparatively subordinate role.

Having been at number five last year, **health care** is found in fourth place on the European list of concerns in 2013; at 11% the level is similarly high to previous years. The greatest concern is in Poland where a quarter of the citizens (24%) worry about health care provision, as in 2012. The issue holds the highest ranking in Europe there. Greater than average concern is also expressed by the British (17%), the Dutch and the Spanish (both 14%). On the contrary, in Belgium the issue plays hardly any part at only 3%.

The complex issues of **housing problems, rent and real estate prices** and **politics/government** have climbed one percentage point to 10% and 9% respectively and thus represent other important and relatively constant challenges in Europe.

## Europe – main results (3)



In relation to the housing problem, concern is highest in Russia at 22% and the issue is ranked at number 2 there as before. In both Spain and the Netherlands concern has risen sharply from 2% to 14% and from 3% to 11% and catapulted the issue into the country's own Top 10. In addition, the Spanish worry more (from 5% to 16%) about politics/government in the country than in 2012. But the issue of politics has the highest relevance in Italy (22%) and Belgium (21%). The Swedish however are hardly bothered by either topic currently at 2%.

The two topics of **pensions/old age provision** and **education policy** this year take 7th and 8th place on the European agenda at 8% each. Austrians (15%), Germans (14%) and Russians (13%) have the greatest concern in relation to pensions. In Poland and Belgium however, concern has fallen considerably from 19% to 6% and from 13% to 4%. In comparison, education policy has the highest priority in Germany (16%). And in Sweden concern has almost doubled from 5% to 9%.

The issue of **corruption** entered the European Top 10 for the first time this year at 7% and thus pushed the issue of **youth unemployment** out of the Top 10. Spain has by far the greatest concern about corruption, with an explosive rise from 4% to 27%. But Russians (11%), Italians and Austrians also (8% each) show above average concern. By contrast, the issue of corruption does not play any part worth mentioning in other countries.

As last year, 7% of Europeans prove to be concerned about **crime**, which is why the issue holds tenth place in the European rankings and remains under the 10% mark for the second time. Great Britain, France and Belgium have the greatest concern, each at 10%, closely followed by the Netherlands and Italy (both at 9%) and Germany (8%). For the Spanish, Polish (both 2%) and Swedish (1%) citizens asked, the issue appears rather less critical.



## Europe – main results (4)



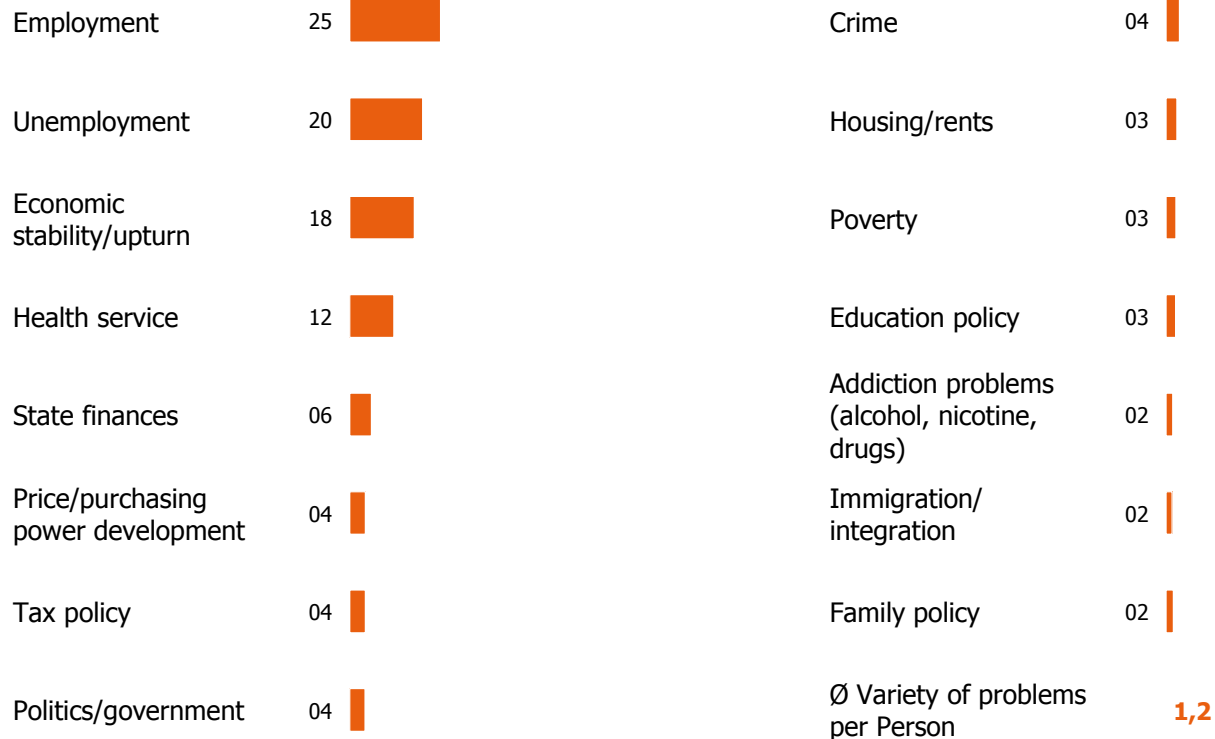
Differences between European countries can be seen not only in terms of the priority accorded to the various issues, but also in the **variety of problems**: the average number of problems that citizens identify in their respective country varies from 1.2 to 2.5. As was the case in the previous year, respondents across Europe identified two problems on average.

The Germans and the French are the most critical. In these countries, respondents cited an average of 2.5 and 2.4 problems respectively. By comparison with the previous year however (2012: both 2.6), concern in both countries has fallen slightly. In Poland the public concern rate has fallen the most steeply from 2.3 in 2012 to its current 1.9, having increased in the two previous years. In Russia too, general concern has fallen slightly to 1.7 problems. In contrast, the strongest increase in problems has taken place in crisis-ridden Spain, where the number of challenges mentioned has risen from 1.5 in 2012 to its current 2.1. Apart from Spain, the average number of problems mentioned has only grown slightly in Italy (from 2.0 to 2.2) and in Sweden (from 1.1 to 1.2). Despite the small increase,

however, the Swedish nation, as was the case last year, expresses the fewest challenges in Europe.

## Challenges in Ireland 2013 – Top 15

... % of respondents mentioned as the most urgent problem to be solved in Ireland: (unaided replies; in %; rounded; multiple responses possible)



Base: 1.000 resp.



## Ireland – main results (1)

There was scarcely any other country in the Eurozone as badly affected by the banking and debt crisis as the former Celtic Tiger Ireland. So around two thirds of the Irish currently see the need for action on issues that are directly connected with the economic crisis, such as the labour market and economic development. Other issues take a back seat and Ireland, with an average of 1.2 **problems per person mentioned**, is along with Sweden the nation with the fewest problems mentioned in Europe (average for Europe: 2.0 mentions per person).

According to the low number of mentions, only four topics are above the 10% mark. The main concerns of the Irish in 2013 revolve particularly around labour market issues: So 25% indicate that more should be done to safeguard **work** and **employment**. A further 20% of the public express their concerns around **unemployment**, and thus the lack of paid employment. The fact that these two issues occupy the top two places is not surprising given the labour market development: according to OECD, unemployment rose continuously from 4.4% in 2005 to 14.7% in 2012, more than three times as much. In the middle of last year, unemployment reached its highest level for 18 years. In the meanwhile, the unemployment rate fell

slightly again, but in February 2013 it was again at 14.2%. According to expert opinion, it would be still higher if the Irish had not emigrated in their tens of thousands – especially the young and highly qualified – to other English-speaking countries such as Great Britain, Australia and Canada. But this group also has good reasons to leave the country currently: The unemployment rate for under-25s had an enormous rise from 8.5% in 2005 to 30.4% in 2012, one of the highest values in Europe. Experts therefore predict up to 75,000 emigrants once again from Ireland for 2012.

In connection with labour market issues, **economic development** at 18% represents a further concern for the Irish and ranks 3rd. In the wake of the economic and financial crisis, Ireland slipped into recession in 2008 and had to cope with declining GDP until 2010. Since 2011, however, the financial situation has slightly recovered again and Eurostat is also predicting positive GDP growth rates for 2013 (1.1%) and 2014 (2.2%).



## Ireland – main results (2)

But other economic factors are likely to play a role. Ireland's strong dependence on exports contributes somewhat to the uncertainty in the difficult economic environment. Even if Ireland has made great strides in stabilising the national budget according to Standard & Poor's, debt is still very high.

The issue of **state finances** was mentioned by 6% of citizens and ranked 5th. The consolidation of public expenditure was furthered by the Irish government through a strong savings programme and an unflinching **tax policy**. Accordingly, 4% of the Irish are concerned about the tax policy, which ranks it 7th. As Ireland had assumed collateral for the country's ailing banking system in the wake of the financial crisis and thus over-indebted the national budget, the country had to seek financial aid from the EU. The aid package was guaranteed conditionally on the restoration of the national budget. Since then, several austerity packages have been approved in Dublin including amongst others an increase in VAT from 21% to 23%, the introduction of new taxes, a cut in the minimum wage, child benefit and other social services, pay cuts for government officials and raising the

pension age to 68 – making the longest formal working life in Europe. Ireland therefore leads the way amongst the deeply indebted countries of the Eurozone.

Neither **education policy** (3% concern, 13th place) and particularly **health care** (12% concern, 4th place) have been spared the need to cut costs. In Ireland there is a national health service predominantly financed through taxes, but also partly through national insurance contributions. Barely half of the Irish also participate in a private insurance scheme, the Voluntary Health Insurance Board. This supplementary insurance is supported nationally and is non-profit-making. The Health Service Executive (HSE) is responsible for the organisation and supervision of the health service, which is explicitly named by 3% of respondents as being in need of improvement. According to a joint report of the EU and OECD, health expenditure per person in Ireland, which grew to an average 6.5% per year between 2000 and 2009, fell to 7.9% in 2010 .



## Ireland – main results (3)

This is arguably a result of the cost-cutting efforts in the health system, on which the Irish government has to make a monthly report to the international lenders of the Troika (EU, EZB, IWF) from early 2013.

4% express criticism of **policy** and the **government**, putting the issue at 8th place on the list of concerns. The Irish respondents' comparatively low concern around this point is likely to be connected with the shift in power relationships in 2011: Following weeks of political turbulence, Parliament was dissolved at the beginning of February. In the new elections on 25th February 2011, the party in power up until then, Fianna Fáil, was punished with a dramatic defeat, losing 25 percentage points and holding only 15 percent of the votes. The opposition party, Fine Gael, on the other hand, was elected with the best result for almost 30 years and provided Kenny as the new prime minister. The prime minister commands not only wide backing in Parliament, but the public also appears to largely endorse his policy in the current crisis. There are repeated protests against the tough austerity measures, but apparently in a weaker form than in southern European countries in crisis. Topicality attains

policy and government through Ireland taking over the Presidency of the EU in January 2013 for six months. Kenny announced that he wished to limit the costs of the Presidency to 60m Euros – in 2004 the country had to pay out almost double that amount for them.

Also the issue of **housing and rent**, ranking 11th at 3% concern, should be considered against the background of the financial crisis: After the building boom prior to the financial crisis, house prices fell by more than a third. A quarter of Irish householders are in arrears with mortgage payments and quite a number of building firms have had to declare bankruptcy. This has led to a situation where around 350,000 houses are empty. "Ghost towns" is the name given by the Irish to the newbuild estates to be seen throughout the country, where not a single house is inhabited.

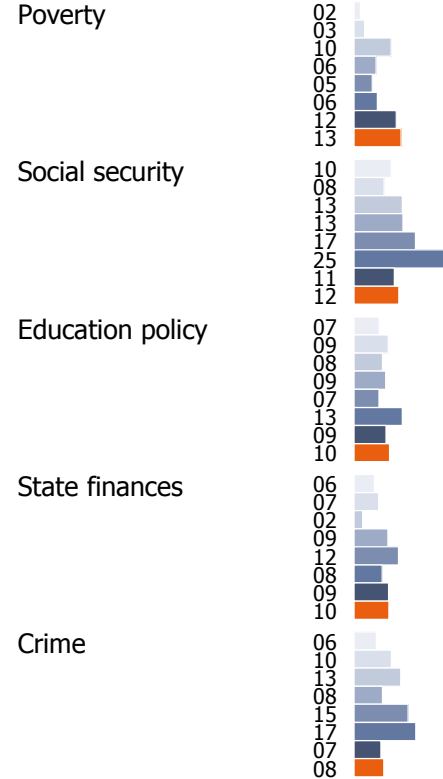
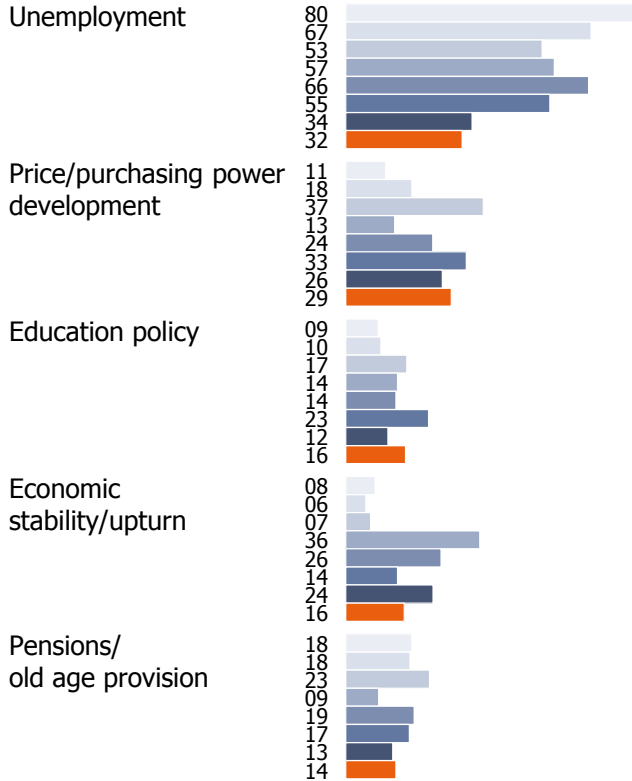
In comparison with economic development, at 4% (6th place) relatively few of the Irish are worried about **price and purchasing power development**. So the rate of inflation fell from 2.6% in 2011 to 1.7% in 2012.

# Challenges in Germany 2006-2013 Top 10

... % of respondents mentioned as the most urgent problem to be solved in Germany: (unaided replies; in %; rounded; multiple responses possible)



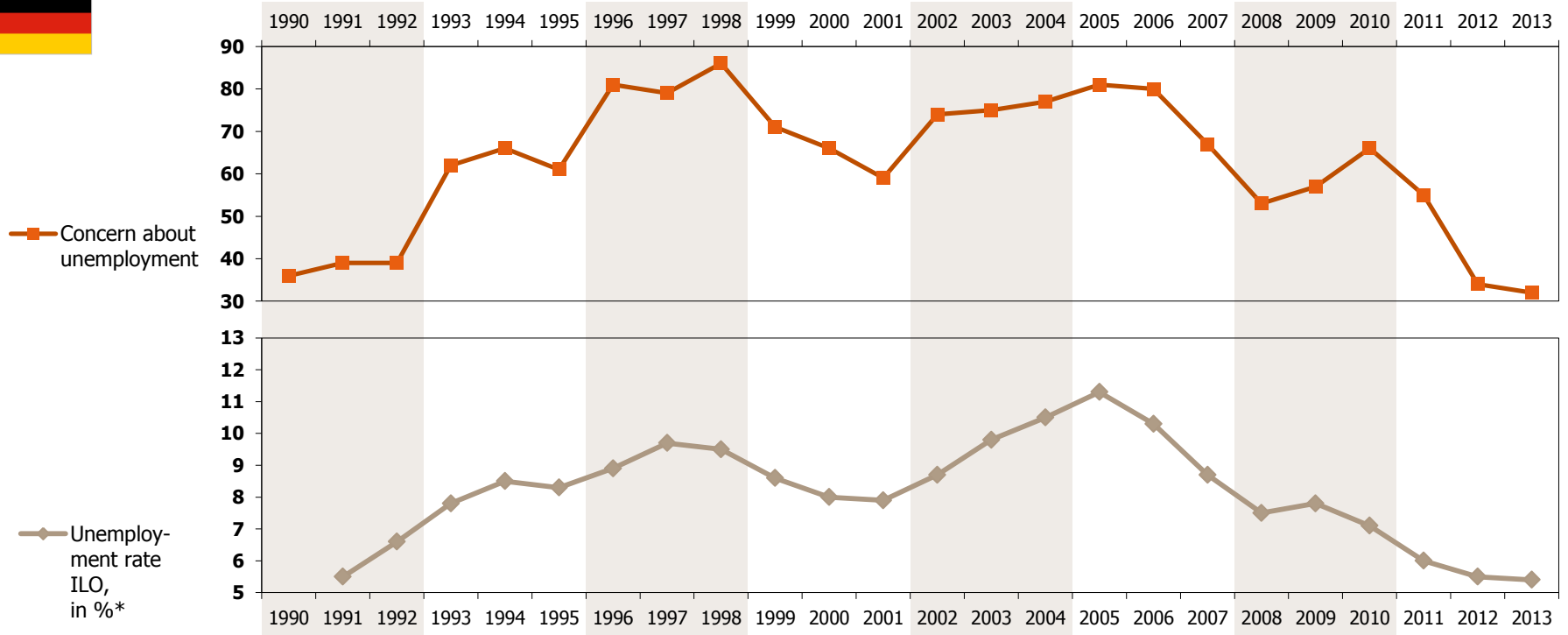
Base 2013: 2,042 resp.



For information only:  
Immigration/  
integration: 8%  
(2012: 7%)  
Tax policy: 8%  
(2012: 9%)

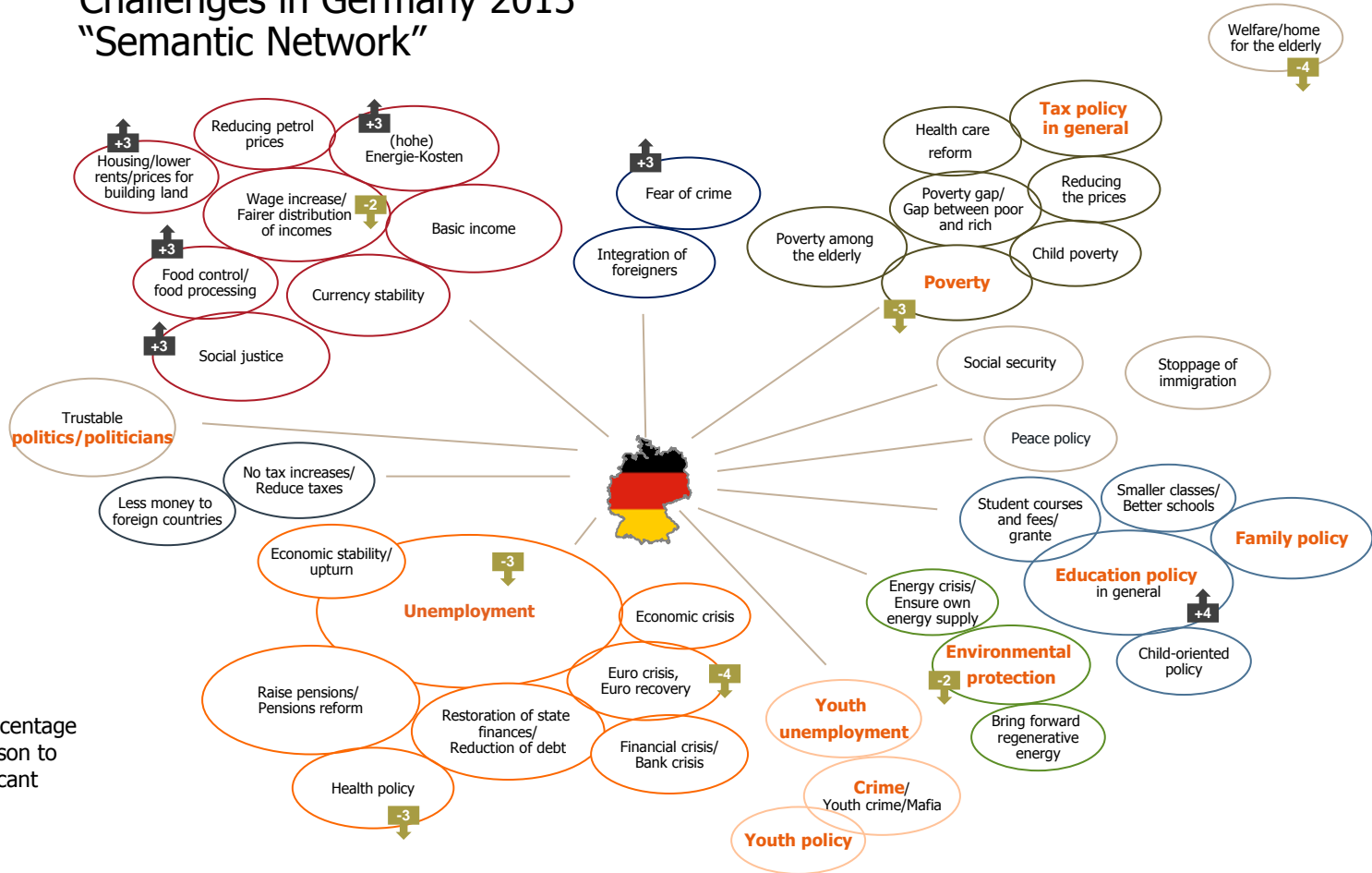
# Unemployment in Germany 1990-2013, 1st place : Comparison between concern and unemployment rate

... % of respondents mentioned unemployment as the most urgent problem to be solved (unaided replies; in %; rounded; multiple responses possible)



\*Source: OECD, reported for Germany only from 1991 (after German reunification), value for 2013: as of April 2013

# Challenges in Germany 2013 "Semantic Network"



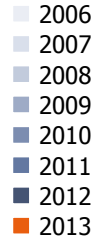
**Note :**

Increase by x percentage points in comparison to 2010 (only significant changes >1)

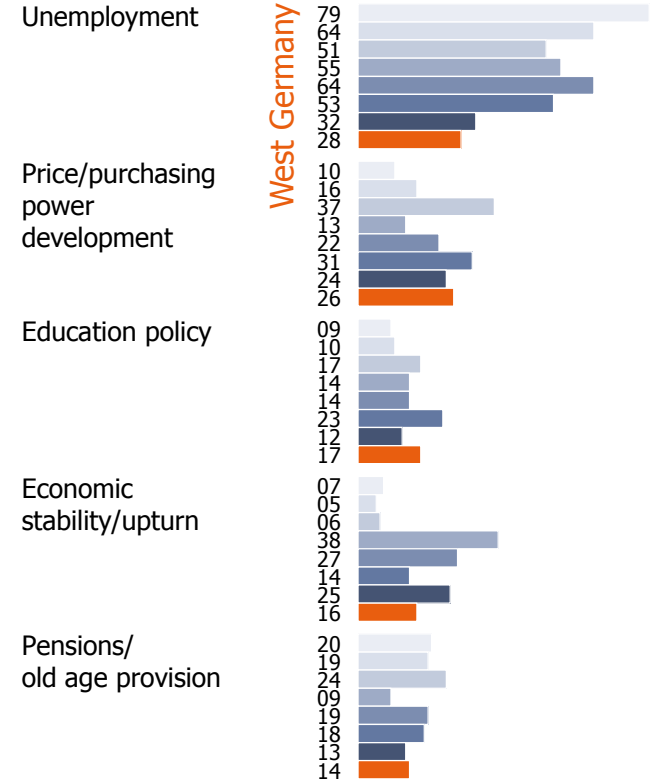
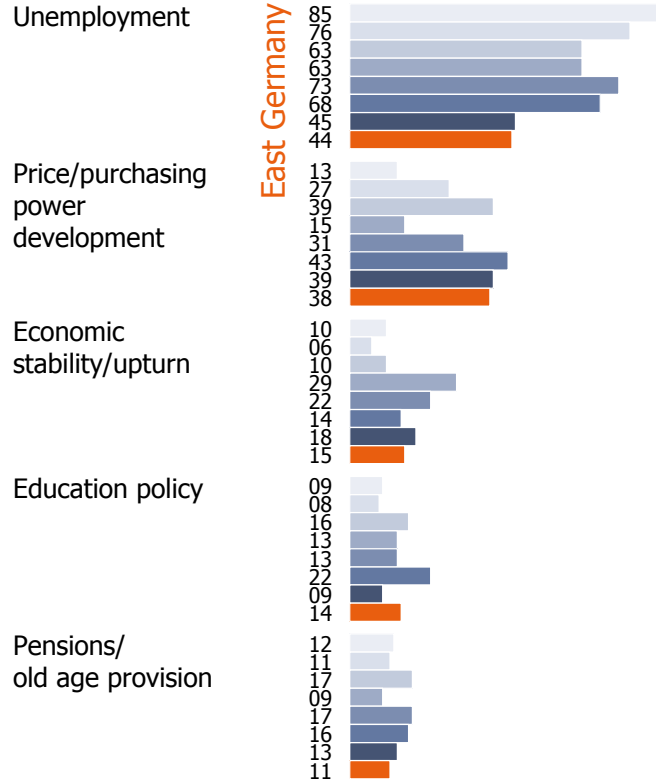


# Challenges in Germany 2013 East and West Germany Top 5

... % of respondents mentioned as the most urgent problem to be solved in Germany: (unaided replies; in %; rounded; multiple responses possible)



Base 2013: 2,042 resp.

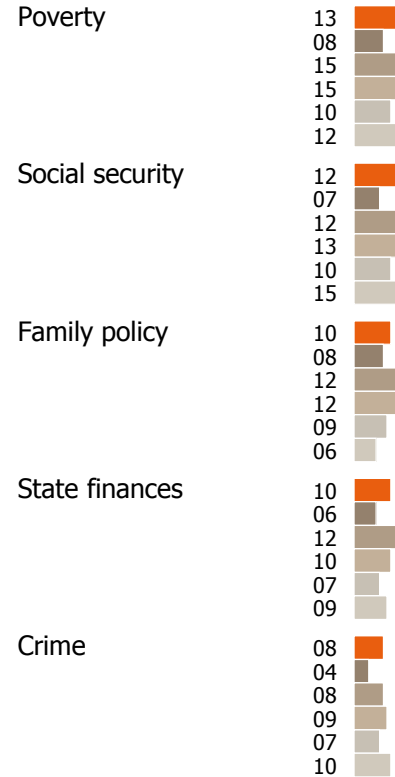
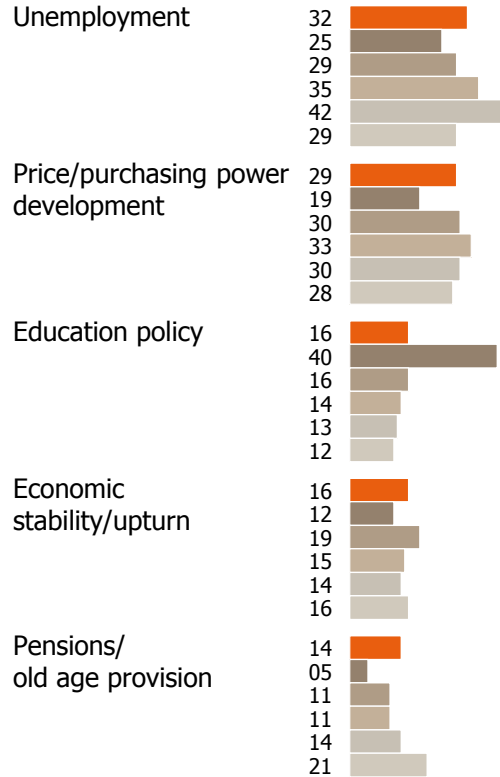


# Challenges in Germany 2013 Lifeworlds Top 10

... % of respondents mentioned as the most urgent problem to be solved in Germany: (unaided replies; in %; rounded; multiple responses possible)



- Total
- Young people in training/ students
- Higher social classes
- Middle social classes
- Lower social classes
- Pensioners



Base 2013: 2,042 resp.



## Germany– main results (1)

Number 1 on the list of German concerns this year is **unemployment**. After a dramatic decrease of 21 percentage points in the previous year, the downward trend is continuing and concern has eased by a further two percentage points to its current 32%. German optimism in this connection is backed up by the unemployment figures: 2012 is the best year for more than two decades with a rate of unemployment of 5.5%. In the previous year, 2011, this was still at 6.0%, making Germany the only OECD country better than before the crisis. Although positive development was slightly damped down in the winter months, experts do not see any reversal of the trend for the worse, but assume a continuation of the stable labour market for 2013.

The issue of **price** and **purchasing power development** – with an interval of 3 percentage points – is only just behind the concern about unemployment. With a slight increase of 3 percentage points, 29% of Germans currently worry about price rises and thus about purchasing power. This is the third highest value measured since 1990 for the whole of Germany. At the

same time inflation in 2012, at +2.0% against the previous year (+2.1%), has actually eased slightly. But this does not appear to be grounds for reassurance for the German consumer, especially since everyday goods – food (+3.2%) and power (+5.6%) – registered high price inflation as an annual average in 2012. In addition, in January 2013 come massive electricity price increases enforced by many electricity providers, which are justified by the costs of the energy revolution. Obviously the comparatively moderate inflation projections for 2013 (+1.6%) and 2014 (+1.4%) do not contribute to relieving stress either. It is possible that good prospects are also tarnished by fear of a massive currency devaluation. In this context, we also observe concern about **state finances**. This may only have the minimal importance of one percentage point, but in a long-term comparison from 1990 onwards it reached at least the second highest value after 12% in 2010, as the highest level of new debt measured in the history of federal Germany.



## Germany – main results (2)

In terms of **economic stability**, however, respondents once again appear calmer than the previous year. If barely a quarter of the German general public were concerned in 2012, today only 16% see a central challenge in this item. This relaxed attitude in citizens cannot be justified by the growth of the GDP alone. If the GDP increased by 3.0% in 2011 according to Eurostat, an increase of only 0.7% is attested for 2012. The projection for 2013 currently only amounts to plus 0.5%. Obviously, citizens include the position in Europe overall in their assessment. Because in comparison with other EU countries, Germany is still far above the average of -0.3%. Furthermore it is shown that Germans also feel far less disturbed by the Euro crisis and especially the financial measures for rescuing Greece. 9% and 6% respectively explicitly mentioned concern over these two points last year, but in 2013 this went down to 5% and 1%. But probably the reduced presence of these issues in politics and the media and the positive assessment of the labour market have contributed to the relaxed attitude.

On the other hand, there is growing concern about the **education policy**, which has currently moved forward at plus 4 percentage points to 16% and so is ranked third. Student fees are probably one reason for this. In the run-up to the survey they were a central issue in Bavaria and Lower Saxony, the last two states that still charge the "campus toll". In Lower Saxony, student fees were the top election campaign issue for the Red-Green coalition, but it was soon obvious that the new government could not keep its promise on all issues. This may have fuelled the resentment of the citizens. In Bavaria, the petition in January against student fees was successful, but it can only be definitely abolished by referendum, unless the State Parliament overturns student fees itself before then. Publication of the 2012 Education Report could also have prompted concerns about education. Certainly the Report verifies a higher level of education overall, for example through more high school leavers and fewer early school leavers, but it still remains a considerable challenge to ensure educational outcomes independently of family origins.

## Germany – main results (3)



There is no great change in other issues on the German list of top ten concerns. Without exception, issues show a tendency to minimal growth (plus 1 percentage point).

The issue of **pensions and old age provision** currently ranks 5th at 14%, the same as last year. There was comparatively little public discussion overall at this point last year. Indeed, last Autumn the government decided to reduce the payment of statutory pension insurance from 19.6% to 18.9%, but since coming into power in January this year it has obviously neither generated noticeable relief for citizens, nor increased confidence in old age provision.

Despite low growth currently, concern about **poverty** is increasing from year to year and at 13% this year has reached the highest value since the survey began. A particular concern of citizens is around poverty in old age, explicitly mentioned by 5% of respondents. It is a unanimous warning in politics and society that the problem of old age poverty will grow worse in the coming generations. It can be assumed in this respect that the

issue will also gain significance in future. Closely linked with this is the issue of **social security**, currently ranked just behind the concern about poverty at 12%.

Number 8 this year at 10% is the concern about **family policy**. So the issue has reached the second highest value and for the first time in 6 years is in the Top 10 again. This is not surprising, as the introduction of the child care subsidy has seen to it that there have been intensive discussions and thus much public furore. Moreover the removal of child care is also a central issue in politics and the media. Only summer will show whether the legal entitlement for all children can be met.

It remains to be seen whether there will be more stringent changes over the next year – and following the Bundestag elections in September 2013. This will certainly also depend on the future federal government.



## Germany – main results, a comparison of East and West Germany

Comparison of each of the seven most important challenges between the new and old states in Germany produces an identical picture in respect of the issues mentioned. However differences in the ranking order and scale of the concern can be established between the two regions.

At the top of the list of concerns in both new and old states is still the concern about **unemployment**. Whilst 28% feel uneasy in the West, the scale of the concern in the new states at 44% continues to be considerably higher. Both regions show falling rates of unemployment, but the level in the East is also still far higher than that in the West.

**Price and purchasing power development** is number 2 at 38% and 26% respectively in both East and West. Although the gap owing to the diametrically opposed development between both regions has slightly narrowed – citizens in the West obviously feel themselves affected somewhat more by price and purchasing power development than last year (plus 2 percentage points).

Third and fourth place differs for each half of the country, albeit only in a small way. While **education policy** (17%) is ahead of concern about **economic stability** (16%) in the West, with a minimal gap, in the new states these two issues are the other way round. In particular, the education policy at 14% is currently considered somewhat less critical here than in the West. 15% of citizens in the new states are concerned about economic stability.

On the issues of **pensions and old age provision** (ranked 5th), **poverty** (ranked 6th) and **social security** (ranked 7th), both halves of the country are "united" – but only where the order of ranking is concerned. For whilst citizens in the East show less concern than last year in all areas, concern in the old states is increasing slightly. For the first time ever, the citizens of West Germany seem more concerned about poverty and social security (13%) than those in the eastern half of the country (11%). This applies to the issues of pensions and old age provision – almost without exception – just since the Reunification.



## Germany – main results, by social grouping

Considering the results in terms of social groupings highlights different perceptions of the issues. This can be explained by the varying socio-economic backgrounds of the individual social groupings.

**Unemployment** is no longer unanimously seen as the greatest challenge in Germany across all living environments. At this point, the most concerned citizens are those in basic circumstances (42%), followed by the middle classes and pensioners.

Apart from citizens in education, all other lifestyles have a similarly high level of concern about **price** and **purchasing power development** at ca. 30% .

**Education policy** – considered 3rd at an overall level – is currently considered most worrying by students and trainees (40%) and ranks 1st. For other lifestyles, this issue – and this is also because of the lesser degree to which they are affected – plays a far less important role (maximum rank 4).

There are far fewer differences of observation with regard to **economic stability**. Students (12%) and citizens from basic circumstances (14%) are least concerned, while citizens from higher social classes think the most about this issue (19%).

Naturally **pensions** and **old age provision** are the strongest areas of concern for retired older people (21%). For trainees and students, this issue – despite what are certainly frequent warnings to make private early provision for old age – still has low relevance (5%).

The issues of **poverty** and **social security** are criticised least by students and trainees, followed by citizens from basic circumstances, although these are presumably bound to be earlier than other lifestyles.

Generally the higher social classes prove more strongly sensitised to economic, social and political issues. On average, they mention more **problems per person** than other lifestyles (2.7 mentions vs. 2.5 mentions on average).



## Germany – main results, semantic network

Once again this year a semantic network was created for the German results using cluster analysis. Four types of information can be taken from the chart:

- The size of the ellipses indicates how often a problem was mentioned.
- The distance from the centre shows when a topic was mentioned. If an “ellipse” is close to the centre it means this topic was often the first to be mentioned.
- Topics which extend in a straight line from the centre and either overlap or are grouped closely together were frequently mentioned together – they are part of an “associative grouping”.
- An arrow pointing either up or down for a topic shows whether that topic has increased or decreased significantly compared to 2010.

As in previous years, this year also there is a cluster of concerns that can be grouped under the heading of **unemployment**. This can be seen in the chart below left and is frequently mentioned in conjunction with the keywords Euro/economic/financial/banking crisis or economic situation.

Above left is another huge area of concern, which can be grouped under the heading **social justice, income and prices**. The issue of **food safety regulation** can also be placed here, being mentioned significantly more often this year than last. This result has certainly been affected by the horsemeat scandal and the exposure of eggs being falsely declared organic, which was ongoing in Germany at the time of the survey.

Further right clockwise is an area of concern around the issue of **poverty**.

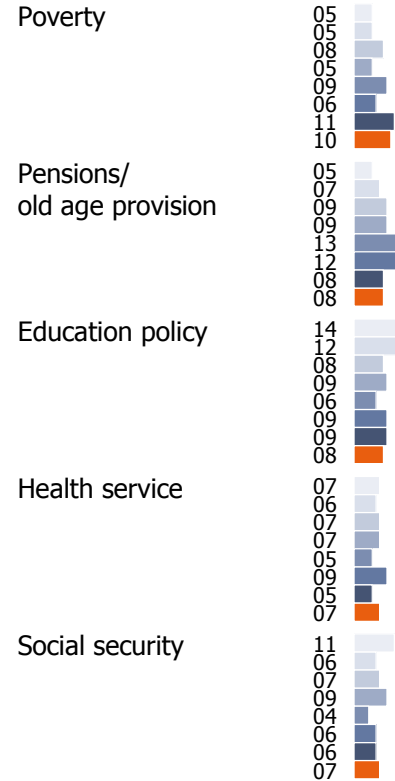
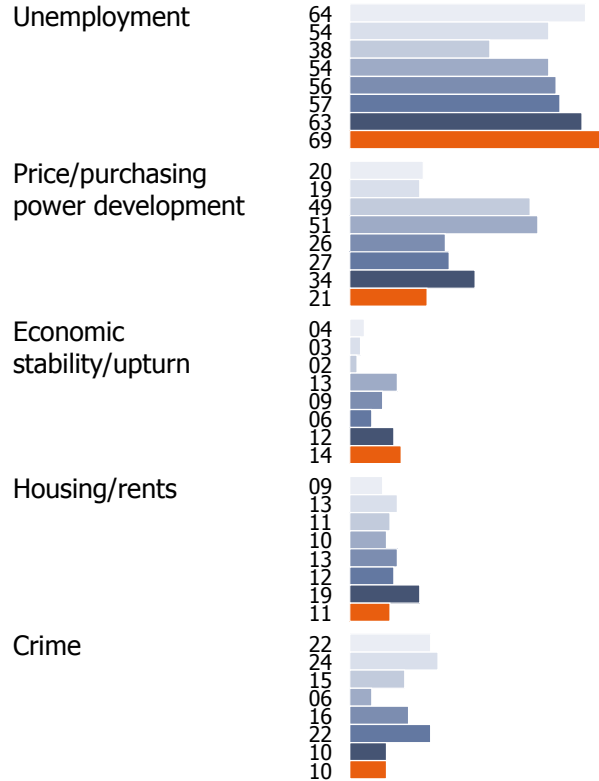
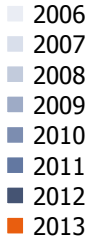
At the bottom right edge, the highest independent area of concern this year is seen to be **education policy**, which includes **family policy**.

In the midst of the major topics, there are still several smaller areas of concern, revolving around the areas of environmental protection and energy, the integration of foreigners, politics and tax and youth-related issues.




# Challenges in France 2013

... % of respondents mentioned as the most urgent problem to be solved in France: (unaided replies; in %; rounded; multiple responses possible)



Base 2013: 1,007 resp.

## France – main results (1)



This year in France concern about **unemployment** has once again risen by 6 percentage points in comparison to 2012. Currently at 69%, it has now reached the highest value since the survey began twelve years ago and thus further expanded its position as by far the greatest challenge for the country. The development of the situation in the labour market in the last few years shows that perception of the problem by the French is very well-founded: So according to the OECD the rate of unemployment rose from 7.8% in 2008 to 10.3% in 2012. In February 2013 the rate was at 10.8% and therefore at a level that was last measured at the end of the 1990s. Economists are worried furthermore that the increase in unemployment this year will carry on. To prevent this, President Hollande declared 2013 the "year of the great battle for work". At the start of 2013, a corresponding draft bill for labour market reform was approved by the socialist government, which still has to be approved by Parliament and allows for a transition to flexibility in the relatively inflexible French labour market, by amongst other things introducing reduced working hours and simplified layoff in cases of economic slowdown.

Unemployment now eclipses the French concern about **price and purchasing power development**, which has currently fallen by 13 percentage points to 21%. This result can be explained on the one hand by the relatively stable rate of inflation since 2011, which was also at 2.0% in 2012. On the other hand, the minimum wage in France initially increased by 2% at 1st July 2012 and again at 1st January 2013 by 0.3%, which prevented real loss of earnings for at least a section of French workers.

French concern around **economic stability** has increased yet again since 2012 by two percentage points to 14%. This is not surprising in light of the -0.4% decline in the GDP forecast for 2013 by Eurostat. Owing to the weak growth outlook, French ratings agencies have reduced the credit rating. At least the agencies have appropriately recognised the government's efforts to balance the budget at the end of February 2013 – whether the public will see this in the same light remains to be seen.

## France – main results (2)

The complex issues around **housing** and **rent** and **real estate prices** have dropped from third to fourth place (-8 percentage points) in comparison to last year. At present only 11% of the French are worried about this topic. The continual rise in real estate prices and rents since 2009 has forced the new socialist government to limit rent rises through contract extensions and new rentals governed by standard rent guidelines. There are also long-term plans to increase the amount of newbuild and the proportion of social housing in towns from 20% to 25%, to be able to offer affordable housing to low earners and students in overcrowded areas. These government measures may also have contributed to the fact that concern about **homelessness** has lessened again. Last year still in the Top Ten at 8%, currently only 2% of the French seem worried about this problem.

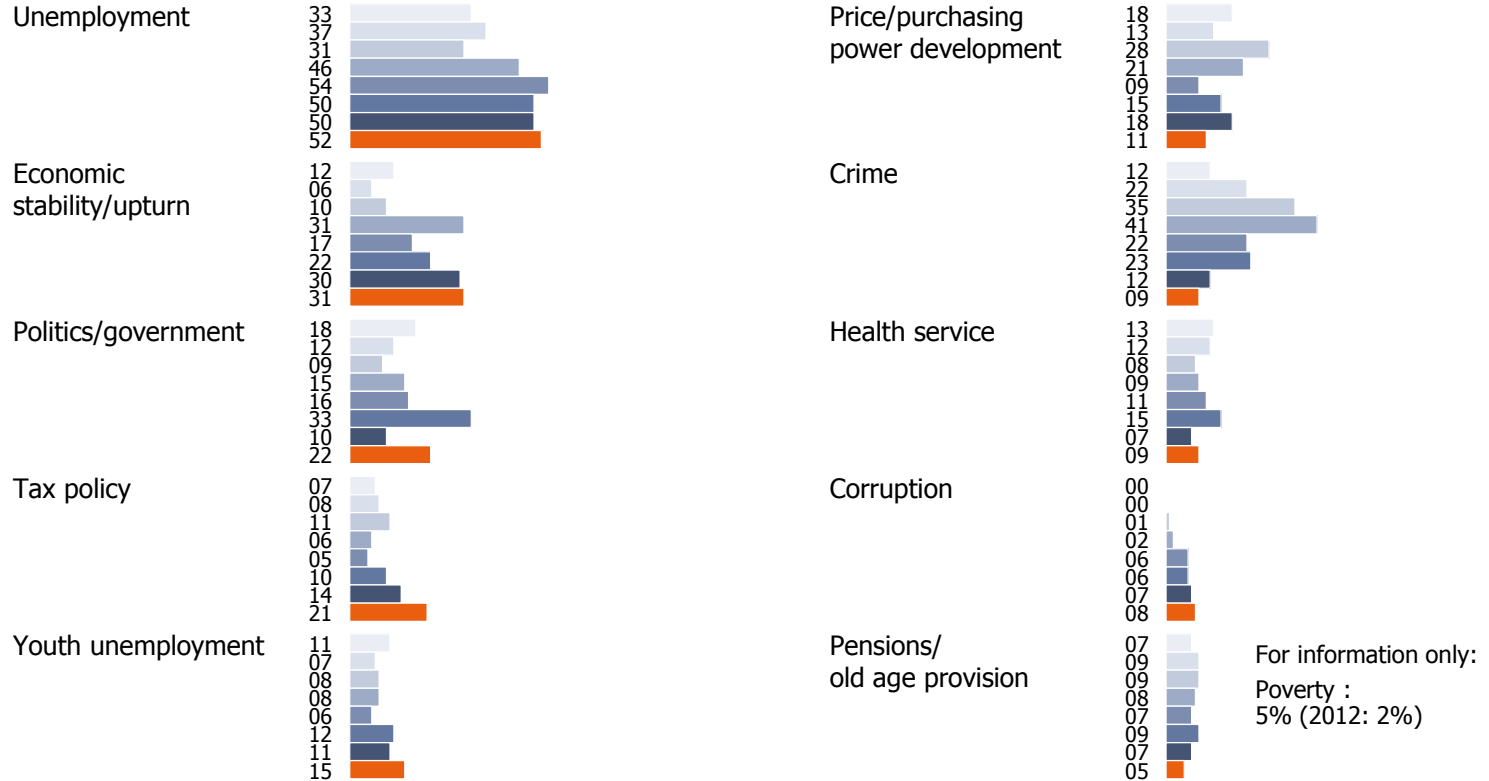
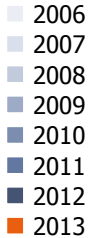
As in 2012, one in ten French wants an increase in the fight against **crime**, placing it at number 5 this year. Concern has clearly decreased in comparison to 2011, when serious riots in the suburbs shocked the country. Even though that level has not

been seen recently, there have been some serious incidents, such as the clash between youths and the police last year in Amiens. Besides this there were media reports of a high crime rate in Marseille – Europe's capital of culture since January 2013 – and 1,200 cars set on fire on New Year's Eve. That such results have not led to greater concern, as is often the way, could be due to Valls, the Minister of the Interior. He aims to ensure security, and has therefore according to media reports risen to the position of the country's favourite politician.

Despite the increase in the rate of unemployment throughout 2012, concern about **poverty** remains relatively stable, having fallen by one percentage point to 10%. This could be owing to the Action Plan against Poverty announced in December 2012 by Prime Minister Ayrault: To fight poverty effectively, he is planning an increase in the national minimum income scheme and professional integration assistance for young people who are not sufficiently qualified.

# Challenges in Italy 2013

... % of respondents mentioned as the most urgent problem to be solved in Italy: (unaided replies; in %; rounded; multiple responses possible)



Base 2013: 1,000 resp.

## Italy – main results (1)



Since 2010 Italian concern over **unemployment** has lain at above 50% and clearly still heads the list of problems to be solved (52%) currently. A glance at the statistics tells just how tense the situation is meanwhile in the labour market: The rate of unemployment in January 2013 according to the OECD was at 11.7%, an increase of more than 2.5 percentage points in comparison to the same month last year. Changes in the quarterly figures in 2012, which rose continuously from 10.0% in the first quarter to 11.2% in the last, point up once again the enormous rise in unemployment. A comparably high rate of unemployment was last recorded in Italy at the end of the 1990s. It is young people, for whom labour market prospects have further deteriorated, who are most severely affected by this critical situation: So according to the OECD, in 2012 **youth unemployment** reached record levels of 35.2% and has risen by almost 15 percentage points since 2007. On the basis of this dramatic change, it is not surprising that the citizen's perception of the problem of unemployment amongst young people has risen on its own in the last few years by 4 percentage points to what is also a record level of 15%. The subject has therefore

moved up one place by comparison with last year and now lies fifth.

**Economic stability**, which is closely linked with the labour market, can be found ranked in second place again in the list of issues this year. 31% of Italians mention the economic situation as a problem that needs urgent solutions. This represents the highest value since the survey began – apart from the 2009 result. The high degree of concern in citizens is understandable if one considers the development of the gross domestic product (GDP) in the past year: According to Eurostat, the Italian economy shrank in each of the four quarters in comparison with the previous year, and at an increasing rate, i.e. by 1.3% in the first quarter of 2012 and by 2.7% in the last. The European Statistics Office identifies an overall decline of minus 2.4% for 2012. Compared with other EU states (excluding Greece), only Portugal and Cyprus had a sharper decline in their GDP in the same period.



## Italy – main results (2)

Current forecasts also do not suggest a rosy future: For 2013 a further decline of 1 percent in economic output is currently expected – after the government under Monti had originally predicted growth of 0.5% for 2013. Experts see reasons for the failure of the recovery mainly in the comprehensive programme of reforms implemented by Monti right at the beginning of his term of office at the end of 2011. However, it is always worth taking into account that the issues raised are clearly less applicable to the economically strong regions of Northern Italy than to the central and southern regions of the country.

The resignation of Prime Minister Monti at the end of last year – after only 13 months in office – and the parliamentary elections necessitated thereby in February 2013 are probably also a pivotal reason for the concern of Italians with respect to **policy** and **government**. 22% appear uneasy over this item, which correlates to an increase of 12 percentage points. A level that has only once, in 2011, been overtaken since the survey began. At that time the survey was taking place at the same time as the defence of the vote of no confidence against Berlusconi initiated by the opposition. In this year the new election fell

precisely on the last two days of surveying, with corresponding coverage in the run-up to the election. This way ex-prime minister Berlusconi amongst others ensured confusion around his candidacy. But it was not only the high media presence, but also the tough austerity measures ordered for the country by Monti – including the austerity budget for 2013 agreed shortly before his resignation – that ensured public resentment. This is also confirmed by the high losses suffered by Monti's alliance during the election, as well as the spectacular success of the comedian Grillo, who was third strongest with his protest party "Five Star". Whether the citizens of this crisis-laden country have a more relaxed assessment of political conditions next year must surely depend to a large extent on the success of the new government – for the first time ever a large coalition – under the leadership of prime minister Enrico Letta.

**Tax policy has also** moved back even more strongly into public focus. 21% of Italians – 7 percentage points more than last year and the highest value since the survey began – currently see tax policy as one of the most important issues in the country. This currently puts them 4th in the rankings.

## Italy – main results (3)

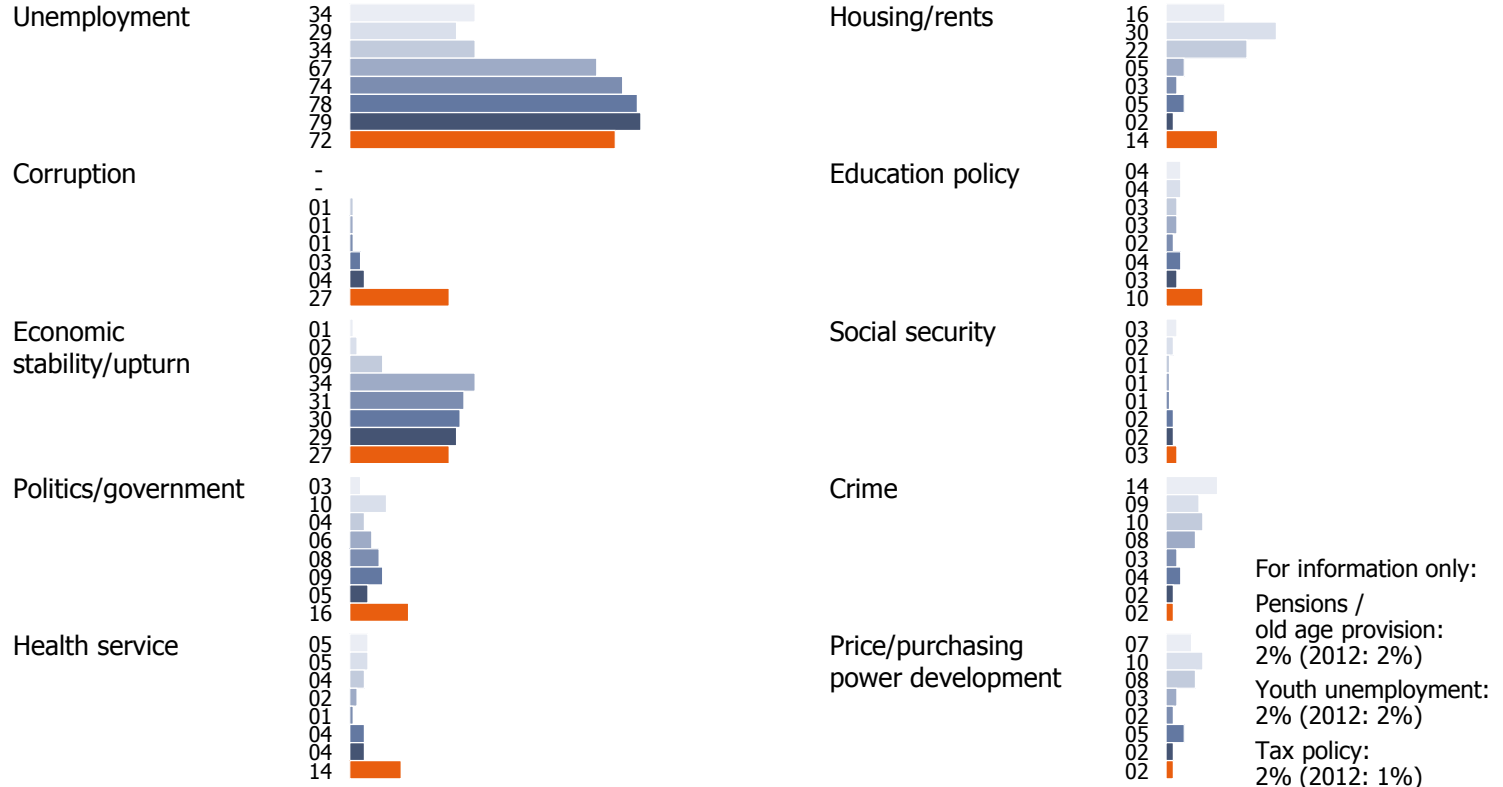


This result is not surprising in light of the fact that Berlusconi promised in the election campaign to repeal the fiercely contested municipal property tax (IMU) introduced by Monti and to completely reimburse citizens with the payments withheld. Since 80% of all Italians own their own homes, an estimated total sum of 4 billion Euros is involved. The EU also added fuel to the fire in the debate by publicly censuring the tax levy at the beginning of January with the criticism that the property tax increases poverty. Possibly the rise in concern about **poverty** from 2% last year to a current 5% is also connected with this. With respect to the increased concern about tax policy, the monitoring programme "Serpico" introduced in the middle of 2012 for exposing tax evasion and fraud must surely have heated the tempers of the Italians too. The 2,000-server system monitors all movements of money on bank accounts and reports any peculiarities, including the tax number. "Serpico" has certainly been used for several years now, but it was only the "Save Italy" law of Prime Minister Monti, since resigned, that enabled the nation's far-reaching fund transfer monitoring. Whether this monitoring system remains in force and succeeds in

actually containing current tax evasion practices – approximately one in five Italians now evade tax – will be seen in future under the new Letta government.

# Challenges in Spain 2013

... % of respondents mentioned as the most urgent problem to be solved in Spain: (unaided replies; in %; rounded; multiple responses possible)



Base 2013: 1,004 resp.



## Spain– main results (1)



Not surprisingly, **unemployment** is in first place this year on the Spanish list of concerns – as it has been since 2009. The growth in the rate of unemployment, which has reached a historic high with a good 26.3% in February 2013, shows that the worry of 72% of the Spanish is not without reason. Because of the sustained severe recession, the comprehensive labour market reform passed in Spring 2012 has to date been unable to give any positive impetus. The 7 percentage point decline in comparison to 2012 could be due to the fact that the subject of unemployment has been somewhat pushed back in the public perception by other current issues, such as corruption and the upcoming economy measures in the health and education sectors.

Because the **corruption problem** has positively exploded up to second place rising by 23 percentage points to 27%. This value, by far the highest since the start of the survey in Spain 12 years ago, makes it clear how deeply the corruption scandal, in which the Spanish governing party Partido Popular (PP) is implicated, has shocked the Spanish since January 2013. Prime

Minister Rajoy and other leading politicians are supposed to have been receiving bribes for years from dubious campaign contributions. The Spanish monarchy has already been linked to allegations of corruption: The Spanish king's son-in-law is said to have misappropriated tax and aid money in his role as chairman of a non-profit foundation. These allegations weigh heavily and have now brought Spain a political crisis in addition to the economic one.

So these corruption scandals have also had a negative impact on the Spanish public's confidence in **politics** and **government**. Last year only 5% of the Spanish expressed concern about this issue, this year it is already 16% – also the highest value since the survey began in Spain. This is probably also due to the fact that at the time of the survey new details of the Spanish scandal were being made known almost daily, for example the Health Minister Mato's corruption or the phone-bugging scandal in Catalonia.

## Spain – main results (2)



People's anger is high, as demonstrated by the nationwide mass-demonstrations. Current voter opinion polls give the ruling party, which on the change of government in 2011 still managed to achieve an absolute majority and the best result in the history of the conservative People's Party PP, a record low.

Likewise with 27% of mentions (2012: 29%), the Spanish public shows its concern about **economic stability** in the country. Although anxiety has reduced slightly year on year since the crisis year of 2009, in comparison with other countries it is still at a very high level – only the Italians are even more concerned. The result clearly reflects the difficult economic situation in which the country has found itself since 2009. The gross domestic product according to Eurostat at that time was still at a low level of -3.7%, but projected values for 2012 and 2013 look somewhat better at -1.4% each. Not until 2014 is the difficult recession supposed to be beaten with economic growth of 0.8%. Obviously policy austerity measures continually used to fight the economic crisis only bear fruit in the medium term. In September 2012, the Rajoy government announced a stringent

austerity programme – the fifth in nine months. Amongst other things, it contained massive reductions in the cultural sector and civil servants' remuneration. Part of the austerity package is a "national reform plan", both to include structural measures and to give an impetus to growth.

Nor are the health and education sectors spared by Spanish austerity measures. In April 2012 drastic economies were announced: Then in May 2012 the government adopted cuts of 7 billion Euros alone in the public health sector, which amongst other things makes provision for additional payments towards prescription drugs and national health insurance treatment, and in the privatisation of hospitals and health centres. Doctors and nurses feared a drastic deterioration in the quality of medicine and regularly held demonstrations against the cuts as a "white flood" in Spain's large towns and cities. The education sector is also affected by the austerity measures with 3 billion Euros of economies; decisions include higher student fees, longer working hours for teachers and larger school classes.

## Spain – main results (3)



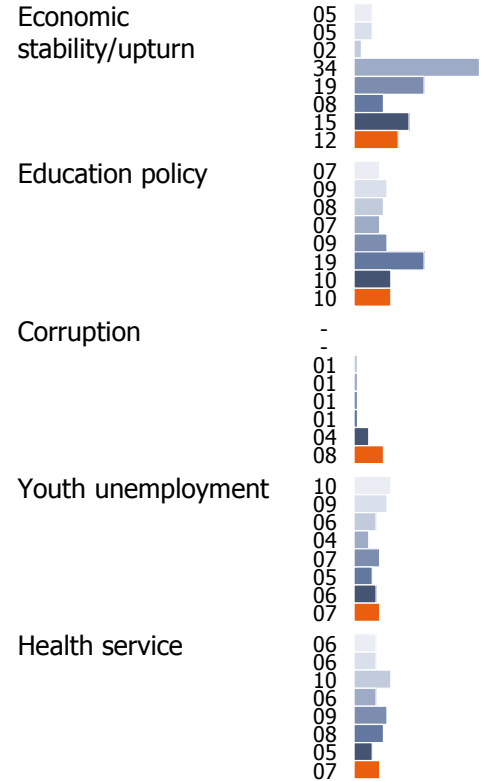
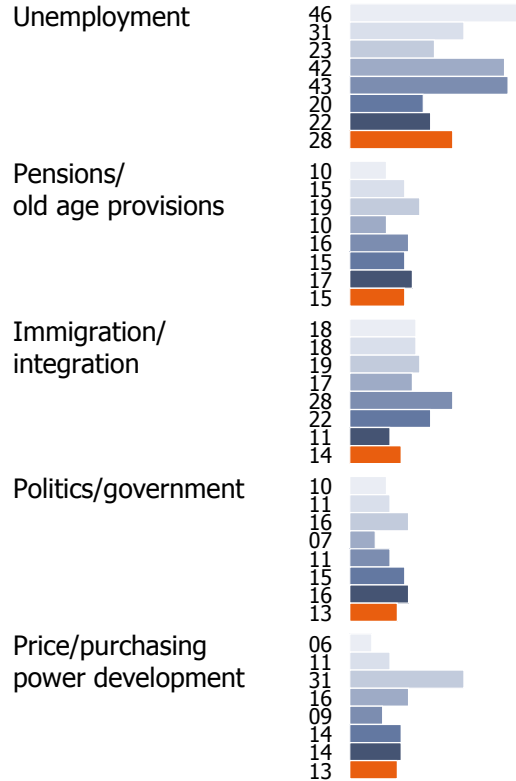
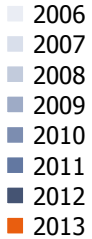
Against this background, it is not surprising that concern over **health care** has risen from 4% to 14% and concern over **education policy** from 3% to 10% – the highest values measured since 2006.

Spanish concern about **housing problems, rent and real estate prices** has also risen strongly by 12 percentage points to its current 14%, raising the topic to 6th place. The background to this development could be the rising number of evictions since the outbreak of the crisis, now at 400,000. More and more Spanish citizens can no longer pay the loans on their properties, because of unemployment for example, and are forced to leave their apartments and houses and give them to the banks in restitution. The weekend before the start of the survey, citizens in 50 towns took to the streets and demanded a social housing policy. Concern about the housing situation will no doubt be strengthened even further by such events.

It is worth mentioning that, as with last year, only 2% of respondents mention the issue of **youth unemployment**. Probably many respondents include this in the superordinate issue of unemployment. For corresponding to the general rate of unemployment, in 2012 youth unemployment also reached a record value and exceeded 50% for the first time: 53.2% of under-25s were reported as unemployed last year according to Eurostat. Thus the rate has tripled since 2006 (17.9%). The success of previous reform programmes, such as the payment of premiums when young people are hired for the first time, remains doubtful against this background. Whether the billion Euro aid programme recently adopted in February 2013 is more successful remains to be seen.

# Challenges in Austria 2013

... % of respondents mentioned as the most urgent problem to be solved in Austria: (unaided replies; in %; rounded; multiple responses possible)



Base 2013: 1,000 resp.



## Austria – main results (1)

**Unemployment** is at the top of the Austrian list of concerns, as it was last year. Following the slight rise in concern last year, the value has climbed yet again by 6 percentage points to its current 28%. Although, according to the OECD, Austria at 4.4% exhibited the lowest rate of unemployment in 2012 compared to the rest of Europe, the rate of unemployment has risen within one year from 4.1% in the first quarter of 2012 to 4.6% in the last quarter. In February 2013, the rate was even 4.8% and was thus again at the same level as in the crisis year of 2009. In light of the above, the increased concern of Austrians is clearly understandable. Given the general situation of economic tension in Europe – especially in the Eurozone - the AMS [public employment service] is expecting a further increase in unemployment figures for the current year, so there is no improvement on the horizon in the short-term.

The Austrians evince slightly less concern than last year about **pensions** and **old age provision**. Anxiety has fallen by 2 percentage points to 15% and has taken 2nd place, pushing out last year's acute concern about public finances – which ranks

only 14th in 2013. Citizens seem to have the sense that pension reform is inevitable, as Austria has the highest pension payments in Europe after the Ukraine and Italy. Cuts in early retirement pensions and the Austrian Pension Account applicable from 2014 are small steps towards reform, but according to expert opinion will not be enough. Currently it is unlikely that there will be further cuts. In September 2013 the National Assembly elections take place and politicians want to avoid addressing such a sensitive area in the run-up to them.

14% of Austrians see **immigration** and **integration** as another serious issue. Following a halving of the concern from 2011 to 2012, this year it has risen slightly again by three percentage points and is currently in 3rd place. The hunger strike initiated in December 2012 by refugees from Afghanistan and Pakistan for more rights for asylum-seekers caused a public furore.

## Austria – main results (2)



This event may have slightly increased concern close to the time of the survey. The asylum policy is an important national issue, and accounts for a government decision in June 2012: In early 2013 the newly created Federal Asylum and Foreigners Office entered into its first operational work. It will be seen to what extent this can reduce concern about immigration and integration. The 2013 parliamentary and national assembly elections have probably also influenced perception and discussion of this issue.

The related issue of **politics** and **government** ends up just behind in 4th place at 13%. The concern has dropped back by 3 percentage points compared with last year. This is very surprising, since criticism – as shown by the survey's time line – usually increases little by little until the election year. The forthcoming National Assembly elections in September and the "hot campaign period" are probably still too far away however to greatly influence the perception of citizens.

Concern about **price/purchasing power development** has hardly changed since 2011 and currently lies at 13% (-1 percentage point). Certainly the inflation rate has fallen from 3.3% in 2011 to 2.5% in 2012 but in January of this year inflation still stood at 2.6%. Even the optimistic projections of the Austrian National Bank (OeNB), which predict a fall in the inflation rate to below 2% for the next two years, obviously cannot remove citizens' concerns. The main price drivers are rental and energy costs and food. These falls in output are incurred regularly and thus play an important part in perceptions about inflation.

At sixth place in the list of concerns with 12% of mentions is **economic stability**, which in comparison with last year has reduced by 3 percentage points. In fact the GDP developed positively in 2012: According to Eurostat calculations, the GDP grew by 0.8% compared with last year and forecasts for 2013 and 2014 are also above the European average at 0.7% and 1.9%.

## Austria – main results (3)

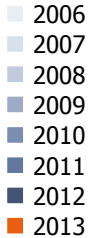


Also the improvement in the forecast from the ratings agency Standard & Poor's from negative to stable suggests that the economic position in Austria is seen as robust.

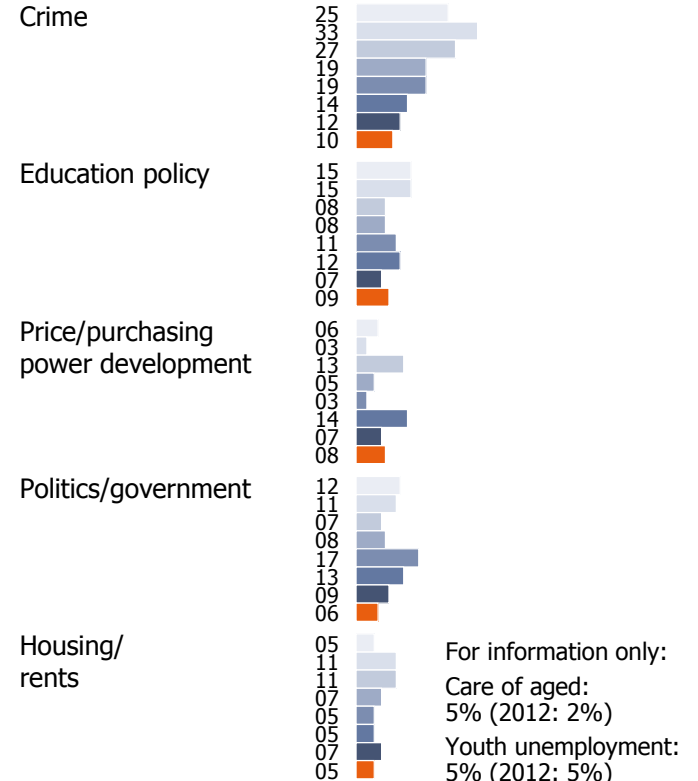
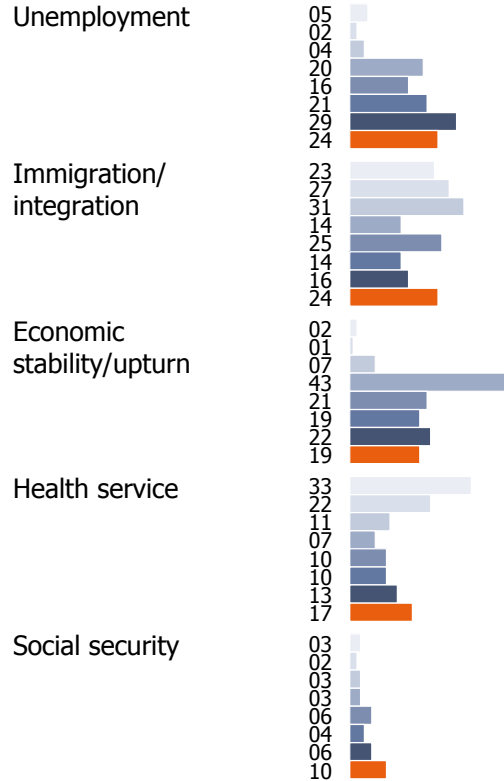
In complete contrast to this is the increasing attention that **corruption** attracts. This item has arrived in the Top Ten for the first time and is now in eighth place at 8%, which is double the previous year. This development is confirmed by the Corruption Perception Index (CPI), which indicates the perceived level of corruption in a country. In the worldwide rankings in 2010 and 2011, Austria still lay in 15th and 16th place, but it has slid to 25th place in the current rankings. One of the reasons for the deterioration in the CPI could be the scandal around Strasser, the ex-Minister of the Interior, who was found guilty of corruption at the beginning of 2013. But the list of corruption scandals that have made feelings run high since the last survey goes on and on. Accordingly policy steps have been taken to confront the problem with a transparency package and tightened criminal laws against corruption. It remains to be seen whether confidence in politics can be won back with the new laws.

# Challenges in UK 2013

... % of respondents mentioned as the most urgent problem to be solved in UK: (unaided replies; in %; rounded; multiple responses possible)



Base 2013: 1,056 resp.







## UK – main results (1)

As with the last two years, the British also name **unemployment** as the most important challenge for the country to solve. In comparison to 2012, when the concern reached its previous high point, the concern did drop by 5 percentage points to its current 24%, but it is still very high priority compared with pre-2009 results. The slight relaxation on the subject reflects current developments in the British labour market: Despite the massive job cuts in public services, the rate of unemployment has dropped continuously throughout 2012 to 7.7% in the fourth quarter. But this is viewed critically by the public, as the basis for the drop in unemployment is obviously the increase in (lower-paid) part-time work.

With a rise of 8 percentage points to 24%, the issue of **immigration** and **integration** holds second place on the British list of concerns in 2013 (2012: 3rd place). The fluctuating value of this ranking last year shows that immigration is an explosive issue in Great Britain, influenced more and more strongly by current events. Since the proportion of immigration in 2012 dropped to 163,000 (2011: 247,000) people, the rise in concern

can probably be attributed to the opening up of the British labour market to new EU member states Bulgaria and Romania. The British government had already opened its labour market in 2004 to people from the eight middle and eastern European states that had entered the EU at that time but from 2014 workers from Bulgaria and Romania also have the right to live and work without restriction in Great Britain. But this issue is already of great concern now to the government and the public.

The concern of the British in regard to **economic stability** has increased by comparison with last year by 3 percentage points to its current 19% and simultaneously moved from second to third place. 2012 was not a good year for the United Kingdom with the exception of the third quarter, which had a boost from the Olympic Games in the summer. The GDP rose only slightly by 0.3%.

## UK – main results (2)



In February 2013 the ratings agency Moody's downgraded the country's credit rating. Possibly the better prospects for 2013 and 2014 with growth projections up to 1.1% have put citizens minds at rest somewhat.

As with last year, the British considered **health** as the fourth most important challenge, which has raised the proportion of concerned citizens by 4 percentage points to 17% currently. As half the references relate explicitly to the National Health Service (NHS), the increasing concern could be due primarily to the NHS reform passed in March 2012 by the House of Commons. To enable cuts in personnel in the health sector, local and regional health authorities were abolished in the course of the reforms and the position of the GP was strengthened. The latter now work in local boards and have the opportunity to purchase health services from private suppliers. This partial privatisation has been fiercely criticised by doctors' associations and trade unions, as the price competition this enforces is ultimately to the detriment of patients – a discussion that has led to higher public awareness for this issue.

**Social security** is also viewed as critical in 2013, as it was last year, so that one in ten Britons are now concerned about it (+4 percentage points) – the highest value since the survey began in 2001. It is striking that an explicit 7% of respondents want a fairer social policy and a halt to benefit cuts. However, the British government has announced further austerity measures in the face of the difficult budget position: So from April 2013 all social (aid) services have been combined into a single service ("universal credit"), which will lead to considerable reductions in the national income. The concern of the British with regard to **old age provision** is understandable in this connection, and has risen from 2% to 5%. The role of the state pension in Great Britain is to provide a minimum income with a basic pension, which is why company pension schemes and private old age provision play a key role.

## UK – main results (3)

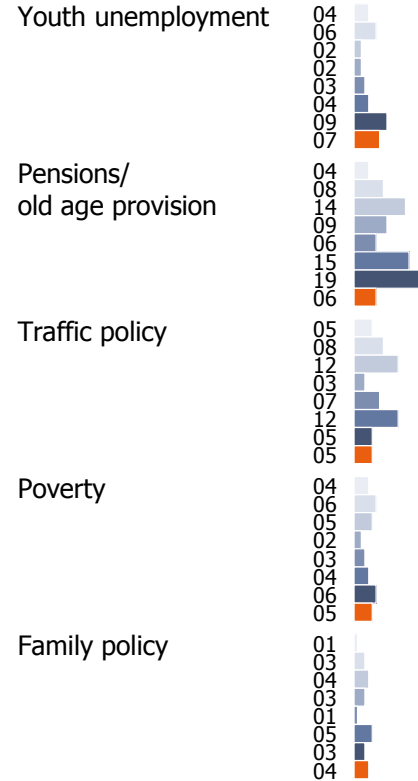
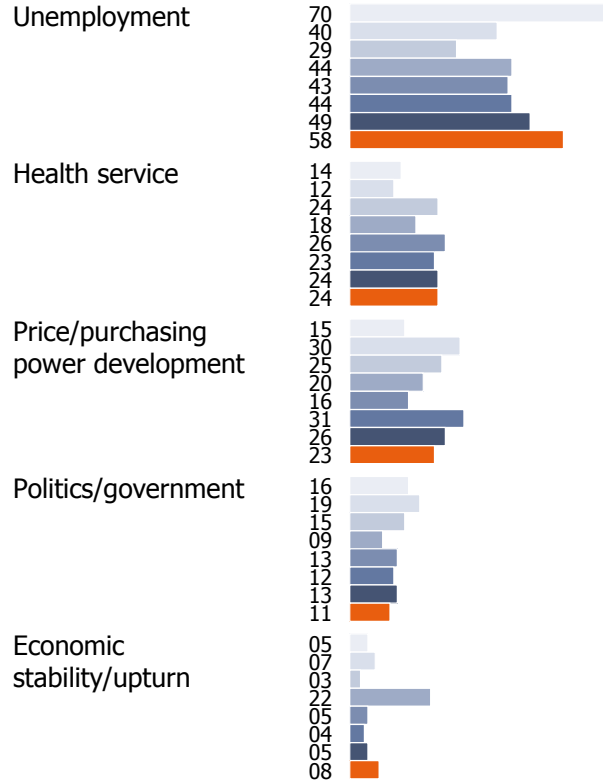
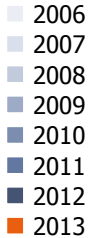


To ensure sufficient security for all workers in old age, in October 2012 the funded supplement "Automatic Enrolment" was introduced, which automatically enrolls all employees with a gross annual income of over £8,105 in an occupational pension scheme. But there is still much public uncertainty, for example over the way in which deductions for pension contributions are applied.

However, concern about **crime** is also declining again in 2013 and currently is only at 10%. However, compared with other European countries, domestic security tops the concerns of the British along with France and Belgium. But the attack, probably Islamist, on a soldier in London in May 2013 is bound to raise anxiety again over crime in Great Britain.

# Challenges in Poland 2013

... % of respondents mentioned as the most urgent problem to be solved in Poland: (unaided replies; in %; rounded; multiple responses possible)



Base 2013: 1,000 resp.

## Poland – main results (1)



**Unemployment** also represents the greatest challenge for Poles in 2013. Concern has grown since 2010 and is currently at 58%. Public perception here corresponds with actual developments on the labour market. The rate of unemployment, which was still at 9.7% in 2010 and 2011 according to the OECD, rose to 10.1% in 2012 and in February 2013 had already reached 10.6%. Similarly, there was also a rise in unemployment rates among under-25s to 26.5% in 2012, thus continuing a trend that has been growing steadily since 2008.

The Poles appear somewhat less concerned than last year about the issue of **youth unemployment**. After being 9% in 2012, 7% of citizens currently see a need for action here. The slight decline in concern could be owing to the fact that the Polish government declared war on high youth unemployment in February 2012: The Ministry of Employment has drawn up a plan to promote further training and mobility grants providing bonuses for employers who take on young people.

**Health** has moved from third to second place in the Polish list of concerns with an unchanged 24%. So the issue has remained an almost constant presence in the public perception since 2008. At that time plans for privatising health provision were first set out and discussion of them continues. At the start of 2012 a health reform came into force that apparently resulted in a deterioration in provision and working conditions for doctors and nurses. In October 2012, the health minister Arlukowicz announced that he wanted to decentralise the national health fund (NFZ) system. The NFZ has a terrible reputation in Poland. Patients have to put up with long waiting times and there are always scandals, which critics ascribe to the structure and underfinancing of the system. It is an open question whether the restructuring of the NFZ will also ease the burden of and lead to improvements for citizens.

## Poland – main results (2)



Following with only a small gap in 3rd place is the development of **price** and **purchasing power**. The concern has certainly fallen again by 3 percentage points and is now at 23%, but the level is still considerable. The reason for Poland's slightly more positive mood may be the drop in the rate of inflation from 4.2% in 2011 to just 3.6% in 2012. In February 2013, the harmonised inflation index even fell to 1.2% and was therefore below the EU average of 2.0%. But the first real wage decrease in 20 years – fallen by 0.1% in 2012 as against 2011 – has possibly diminished this sense of ease in citizens. Because the proportion of those demanding explicitly higher wages and a fairer distribution of income has risen from 12% to 14%.

With regard to **politics and government**, ranked fourth, Polish concerns have fallen slightly from 13% in 2012 to 11%. Prime Minister Tusk, who was confirmed as the first office holder for a second term in the Autumn 2011 parliamentary elections, has since had to tackle several challenges. So – in the face of fierce opposition – he has implemented reforms in the health and pension system. That Poles have not become more concerned

because of these unpopular cuts could also be because of the content of the government's policy statement last October. In this, Tusk said goodbye to European austerity, which he had supported until then as a means of crisis management, and promised to allocate up to 200 million Euros to boost the Polish economy and secure jobs. He was able to clinch the vote of confidence that immediately followed in his favour.

The Polish are also increasingly critical on the issue of **economic stability**. In comparison with last year, concern has risen by 3 percentage points to 8%, 5th on the list of concerns. Poland was the only EU country in the crisis year of 2009 – which was also because of its comparatively low dependence on exports – to exhibit robust growth and thus be able to prevent a slide into recession.

## Poland – main results (3)



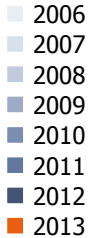
However, according to Eurostat, in 2012 the GDP only grew by 2%, though the EU average was clearly lower at -0.3%. And for 2013 a further decline in growth to 1.2% is predicted. Experts see growing unemployment and the increasing "brain drain", i.e. the exodus of well-trained workers abroad, as closely linked to economic development. Both it is feared could obstruct the domestic demand so important for Poland. It remains to be seen whether the economic recovery anticipated by Eurostat in 2014 will actually take effect.

However, Polish concern about **pensions and old age provision** has fallen appreciably by 13 percentage points to 6% and is therefore 7th in the rankings (4th place in 2011/2012). The pension reforms passed in May 2012, which made for spirited discussions amongst opposition parties and trade unions in the run-up, have certainly contributed to this relaxation. The Polish people had also expressed their displeasure and taken to the streets for mass demonstrations. The new law made provision to raise the retirement age by increments to 67 from 2013 for men of 65 and women of 60 at that time. However,

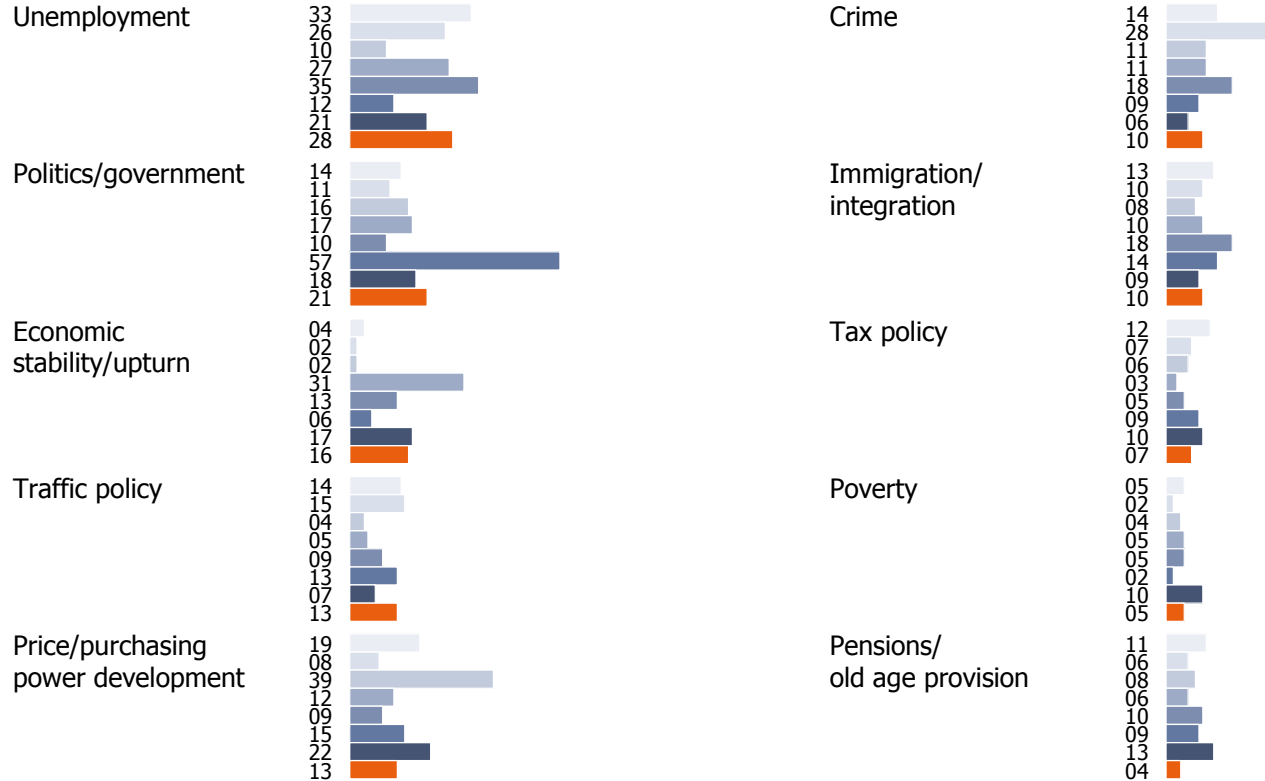
there is to be the opportunity for men in their 65th year and women in their 62nd year to retire, but with reductions. After President Komorowski signed this revision of old age provision in June 2012, the controversial discussion of this issue subsided again. In the months since, citizens' concern has also substantially decreased.

# Challenges in Belgium 2013

... % of respondents mentioned as the most urgent problem to be solved in Belgium: (unaided replies; in %; rounded; multiple responses possible)



Base 2013: 1,005 resp.





## Belgium – main results (1)



The Belgians still perceive **unemployment** to be as great a problem this year as at the start of 2012. Currently at 28% of mentions, the issue is now in 1st place (+7 percentage points). Actually unemployment is growing: According to the OECD, the rate of unemployment has risen from 7.2% in 2011 to 7.6% in 2012, and the Belgian National Bank is even expecting an increase to 8.1% for 2013. Closely linked to concern about the increase in unemployment is assessment of the country's **economic stability**: At least 16% of citizens are concerned about economic strength, making it 3rd in the list of problems. As an exporter, Belgium is greatly dependent on global economic developments, especially in European countries. The recession in the Eurozone has led to a clear rise in companies failing and job losses in Belgium over the last year. With the closure of the Ford factory in Genk at the end of 2014, there are further substantial job cuts imminent. In addition there are high unit labour costs compared with other countries, which further restrict the ability to compete. The GDP has accordingly fallen in 2012 by 0.2% and a further minus of 0.5% is predicted for 2013. Also no easing of the situation is expected in the near future on either issue.

In 2nd place amongst the greatest challenges for Belgium is the issue of **politics/government**. After concern fell from 57% to 18% in 2012, when a government was once more able to be formed after 20 months, this year shows a slight increase to 21%. This could be because the permanent smouldering conflict between the Flemish and the Walloons burst into flames again at the local elections in Autumn 2012. The "New Flemish Alliance" (N-VA) under de Wever, the new Mayor of Antwerp, was able to win the vote clearly with his demand for the secession of Flanders. The Flemish are obviously increasingly distancing themselves from the annual aid payments to the economically weaker Wallonia and therefore support the political objectives of the nationalist N-VA. But citizens also see room for improvement in the justice system, which this year was explicitly mentioned by 5% of respondents in the context of criticism of the political leadership.

## Belgium – main results (2)



Probably the expression of displeasure over the functioning of the judicial system is mainly connected with the Dutroux case: The accomplice and ex-wife of the sex offender has been freed early from prison in August 2012. Now at the start of this year Dutroux has also applied for early release himself, which has sparked great indignation in the country. In particular Justice Minister Turtelboom is the focus of public criticism, as she announced stricter regulations for early release after Martin's release, but has not implemented these consistently. The Dutroux case is agreed to be probably one of the most awful crimes in Belgium's history and therefore could also be jointly responsible for the growing concern about **crime**. This year the issue is in 6th place at 10% and a rise of four percentage points. But the Dutroux case is not the only one that stirs feelings: The murder of a Brussels Transport Services worker in April last year could also have made public awareness more sensitive. The employee was killed when he tried to record a traffic accident. This triggered a intensive debate nationwide on public safety. Massive protests and strikes by employees of the Brussels Transport Services finally forced the Minister of the Interior to

announce additional police for the city and the employment of more security personnel generally.

The Belgians see the **transport policy** as the fourth greatest problem. From 7% last year 13% are now worried about it. The years-long discussion about the introduction of a toll for the entire road network could be a cause of the relatively high perception of the problem in this area. At first only foreign vehicles were to be charged the toll, but this is not permissible under European law and would have been prohibited by the EU. Introduction of the toll has now officially fallen through for technical reasons as of 1st January 2013, but it was later rumoured that the administrative districts in the region of Brussels and Flanders could not reach agreement on the toll. Obviously the conflict between Belgian ethnic groups also affects transport policy. The introduction of a compulsory toll has now been deferred to 2016.

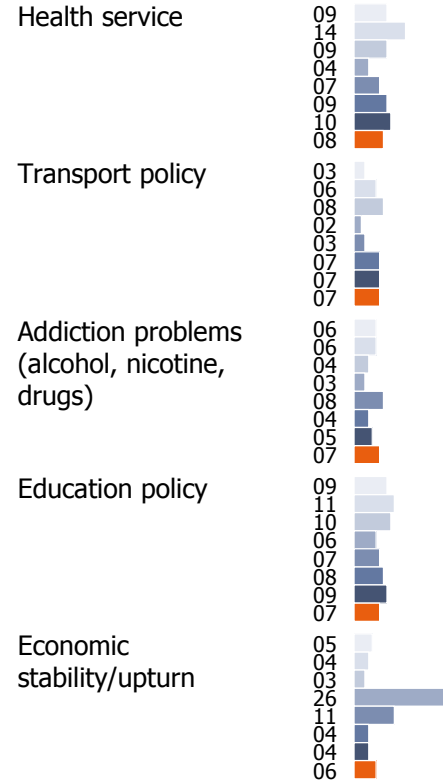
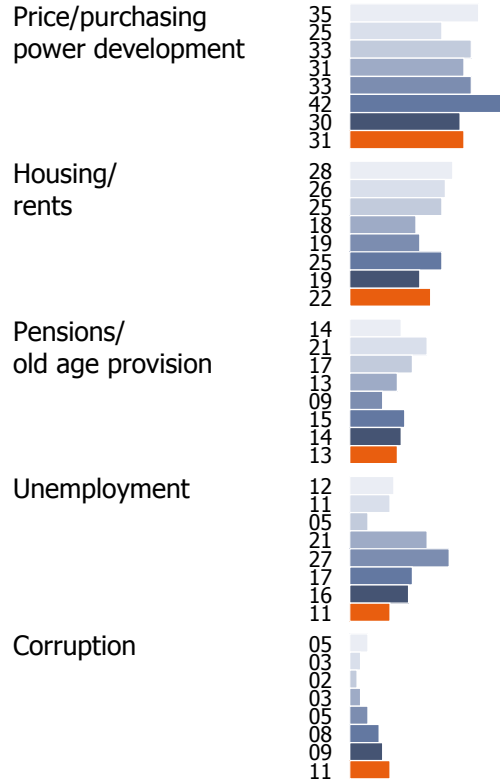
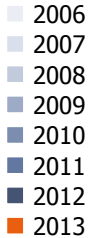
## Belgium – main results (3)



After being in first place last year, the topic of **price/purchasing power development** is just 5th in 2013. While in 2012 it still had 22% mentions, this year the value fell to 13%. This fall of nine percentage points is most likely due to the falling rate of inflation. This fell from 3.5% in 2011 then 2.8% in 2012 to 1.2% in February 2013 according to the OECD and so is clearly below the EU average at present. Whether the short-term positive growth in inflation can also be stabilised in the medium term will depend particularly on further developments in energy prices, which have remained comparatively moderate.

# Challenges in Russia 2013

... % of respondents mentioned as the most urgent problem to be solved in Russia: (unaided replies; in %; rounded; multiple responses possible)



Base 2013: 2,189 resp.

## Russia – main results (1)



As in previous years, the issue of **price** and **purchasing power development** tops the list of worries in Russia. 31% of Russians see inflation as the greatest challenge, with concern remaining static in comparison to last year. According to the OECD, in April and May of last year the inflation rate of 3.6% was at its lowest level since the end of the Soviet Union. Thereafter however it showed an increase and by the end of 2012 had reached a value of 6.5%. In January and February 2013 the 7% mark was even exceeded. The comparatively good growth in income may have prevented greater concern. In 2012 the country's earnings grew by an average of 4.2%, particularly in the wake of an election promise made by Putin for public services. In order to prevent a brain drain of scarce skilled workers, companies in the private sector also had to play their part.

In contrast to price and purchasing power development – and to other countries surveyed – concern about **economic stability** currently plays a minor part in Russia. It lies at 6% and has only risen slightly by two percentage points to reach tenth

place in the rankings. There is actually little reason to complain: Since 2000 the Russian economy has manifested stable growth, which has also continued in 2012 with a 3.4% rise in GDP. The outlook is also good, as the projections for 2013 to 2015 are for continuing positive growth.

The second greatest concern for Russians on the other hand focuses on the **housing situation and rent** and **real estate prices**. Currently 22% of the population express their displeasure, against 19% the previous year. This issue has consistently represented the top 4 in the rankings since the start of the survey and makes the subject a permanent challenge in Russia. The concern of citizens is due to the fact that there is generally too little living space and that in the next few years this will continue to be scarce. Clearly housing plays an important role in the growing construction industry, but it is far from adequate. Property prices and rents are rising just as fast, which creates serious difficulties for many citizens with average incomes.

## Russia – main results (2)



Particularly affected by this are people in the regions of Moscow and St Petersburg, where even today many families still live in community housing, a so-called Kommunka. And even if there is a right to housing as part of a social programme, waiting times can be quite long.

13% of Russians this year are uneasy about **pensions** and **old age provision**. Although there appears to be a tendency for concern to reduce since 2011, old age provision is still ranked third. This is probably also due to the ongoing discussion over the raising of the retirement age. President Putin had promised in the run-up to the election in March 2012 not to raise the retirement age, probably so as not to stir up resentment in the population and possibly endanger his re-election. But given demographic trends, an increase is hard to avoid in the medium term, since if the current comparatively low retirement age of 55 for women and 60 for men remains in force – with no change in the low birth rate – Russia is threatened with a drop in pension levels and a consequent rise again in old age poverty.

In fourth place on the list of concerns is the issue of **unemployment**, about which 11% of Russians show concern. The concern's downward trend since 2011, more than halving it, corresponds with the rate of unemployment : Having been 8.4% in 2009, in 2011 6.6% of the population who are fit for employment were still registered unemployed, and in 2012 the rate was 5.7%. The rate of unemployment has therefore fallen again in the meanwhile to its position prior to the start of the economic crisis. This may be due on the one hand to the fact that labour market instruments such as short-time working, compulsory leave and delayed payment of wages have taken hold and therefore prevented redundancies. On the other hand there are probably also a few employees who have stepped into the shadow economy.

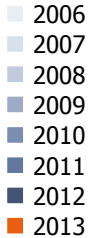
## Russia – main results (3)



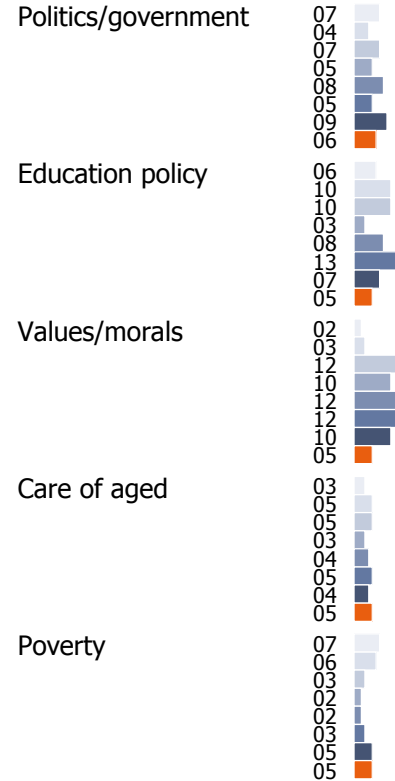
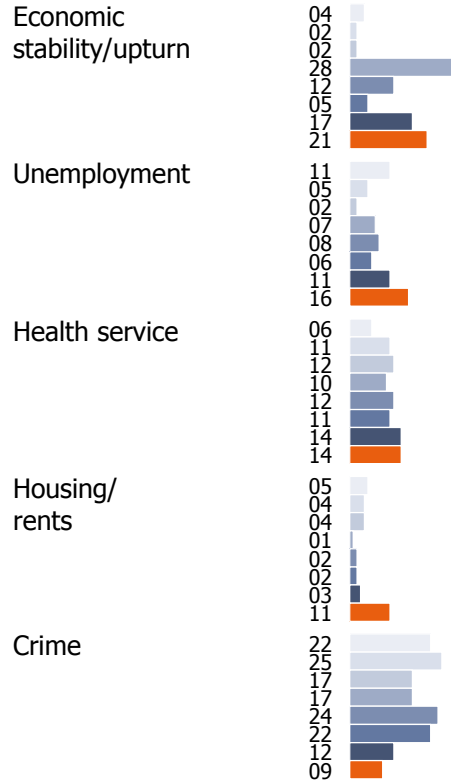
The perception of **corruption** as a problem has grown slowly but steadily in the last few years. At 2% in 2008 the topic was still 17th, but in the meanwhile it has come into fifth place at 11%. The recent increase is probably due to two government corruption scandals in November 2012. Initially Defence Minister Serdjukow was removed from office, as he was accused of embezzling money. At almost the same time, President Putin's former Agriculture Minister Skrynnik was suspected of cronyism and personal gain in her sphere of influence. Putin used the affair to gain media attention by staging an anti-corruption campaign and announcing a crackdown regardless of rank.

# Challenges in the Netherlands 2013

... % of respondents mentioned as the most urgent problem to be solved in the Netherlands: (unaided replies; in %; rounded; multiple responses possible)



Base 2013: 1,012 resp.







## The Netherlands – main results (1)

Just like last year, **economic stability** is regarded by Dutch citizens as the country's greatest challenge. After concern about the economic situation had more than tripled in 2012, it went up yet again this year by four percentage points to 21%. There are actually signs of a recession in the Dutch economy: Eurostat reports a 1.0% drop overall in the GDP for 2012 and the Statistics Office is also projecting a further fall in economic performance for 2013, even if the drop is predicted to be somewhat lower at 0.6%. Just a few days before the start of the survey, the ratings agency Fitch warned of losing the "AAA" top credit rating and lowered the outlook from "stable" to "negative". The reasons for this were mainly the very weak housing market and the problems in the banking sector. Awareness of problems around economic stability is further intensified by the nationalisation of the "SNS Reaal" bank. During the survey it was known that this bank was on the brink of ruin because of worthless property loans and would have to be rescued by the state. This rescue cost the Netherlands 3.7 billion Euros, which resulted in a 1.6 billion Euro rise in the national debt and put the new indebtedness above the Maastricht Criterion of a maximum of three percent.

For the first time the issue of **unemployment** has moved to second place on the Dutch list of concerns: 16% of citizens are currently anxious about this. The increase of 5 percentage points over the previous year marks the highest value for a concern since the survey began in 2001. Until February 2013, the rate of unemployment climbed continuously to 6.2%, more than one percentage point, from May last year, when the rate was 5.1%. Although this is still a small value in comparison with the EU, it represents the country's highest unemployment since the mid-1990s. Against the background of a trend towards economic recession, the increased concern of the Dutch is thus understandable.



## The Netherlands – main results (2)

Concern about **health** is at the same 14% level as last year, but was ousted from 2nd to 3rd place by the increased concern about unemployment. As in the past, the healthcare system attracts a lot of attention in the Netherlands: At the end of 2012 the new government under Prime Minister Rutte, supported by the conservative liberal VVD party and the social democratic PvdA [Labour Party], set out as part of the coalition contract a 16 billion Euro comprehensive austerity package, particularly with regard to the welfare system. The plan also includes changes to the health insurance: So for example, health insurance funds are no longer to be financed by lump sums in future, but by means-tested amounts. According to media reports, some groups of people could thereby lose up to 30% of their purchasing power. The government denies this and stresses that people on low incomes will have to dig less deeply into their pockets than before reform. But reform is still too new for citizens to feel the full impact.

Concern about the **housing problem** and concerns about **rent** and **real estate prices** have risen enormously in

comparison with last year. While less importance was attached to the issue last year with 3%, perception of the problem has almost quadrupled this year and is now at 11%. This challenge is now therefore in fourth place. At the same time concern revolves very strongly around the property market, as 5% of citizens alone explicitly mention this point. In fact in the meanwhile a financial crisis on the Spanish scale has even been spoken of in the country. Since the 2008 financial crisis, prices in Holland have fallen steadily according to the "House Price Index" (HPI), on average by 4% per year, and experts predict a further drop in prices for the next year. The reason is lavish lending by the banks, who have brought homeowners into hardship through the emerging financial crisis: that is the situation for one in ten homeowners in the face of loss of value from high financial losses. At the same time rising unemployment and a recession ensure that buyers do not appear and owners are only able to sell their houses with difficulty at moderate prices.



## The Netherlands – main results (3)

In contrast the concern of the Dutch about **crime** has slid down from 4th to 5th. The concern has fallen by 3 percentage points to the lowest value since 2001 and is now at 9%. According to a police report, the actual crime rate in the period from 2007 to 2011 fell continuously by 20% overall. This obviously led to appreciable relief in citizens.

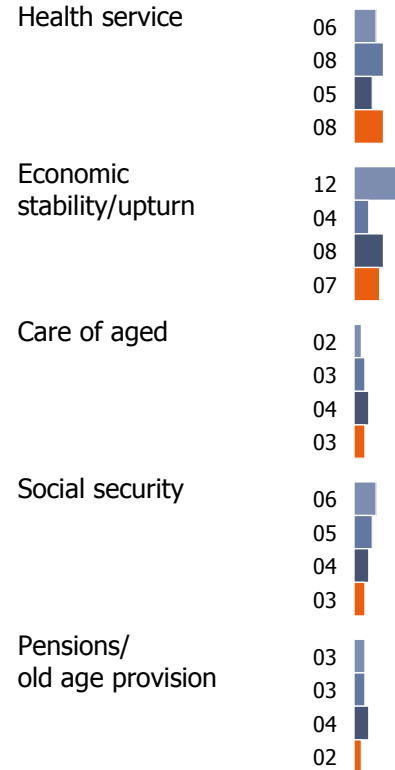
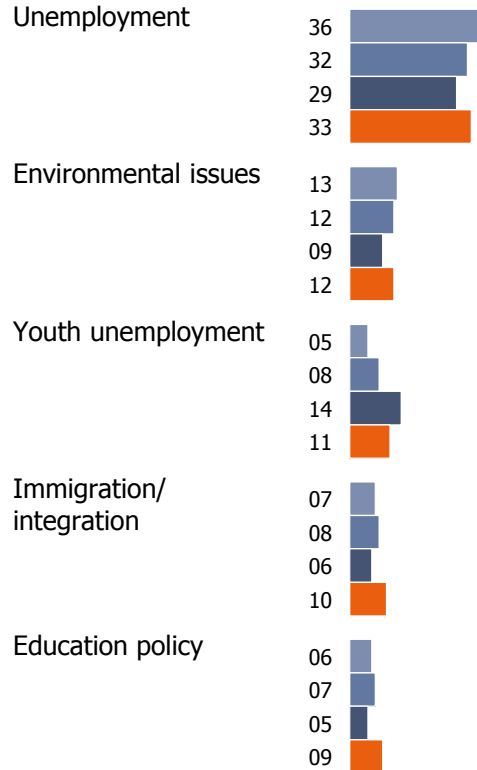
The drop in anxiety could also be connected with the present almost non-existent concern about **immigration** and **integration**. Currently at 2%, for the first time since the survey findings were collected in the Netherlands this is far from being a top 10 concern.

Another remarkable decline in concern can be observed around the **formation of values** and **morals**. After five consecutive years where more than 10% of respondents named this as a major problem, this year only 5% mention this concern. The fall in crime and the accompanying increase in confidence could also have influenced this movement.

But it is also conceivable that the current acute concern around unemployment and the country's economic growth, which have a very noticeable impact on citizens and consumers, is currently shifting the focus of public perception away from other issues.

# Challenges in Sweden 2013

... % of respondents mentioned as the most urgent problem to be solved in Sweden: (unaided replies; in %; rounded; multiple responses possible)



For information only:  
 Poverty: 2% (2012: 2%)  
 Politics/government: 2% (2012: 1%)  
 Price/purchasing power development: 2% (2012: 1%)  
 Family policy: 2% (2012: 1%)  
 Housing/rents: 2% (2012: 2%)

■ 2010  
 ■ 2011  
 ■ 2012  
 ■ 2013

Base 2013: 1,000 resp.



## Sweden – main results (1)

**Unemployment** represents – as it did last year – the greatest problem child for the Swedes. The urgency of the problem has risen once again by 4 percentage points in comparison with 2012, having shown a slight downward trend since 2010. 33% of citizens are currently concerned. According to the OECD, the country's rate of unemployment from 2010 to 2011 recovered from 8.6% to 7.8%, so currently shows a slight deterioration again at 8.0%. Sweden is therefore clearly below the EU average, but exhibits higher values than its neighbours Norway, Finland and Denmark. On the other hand, the Swedes' concern about **youth unemployment** has lost a little of its urgency, having gone back from 2nd to 3rd place with minus 3 percentage points and now resting at 11%. Probably the main focus of public perception has undergone an overall shift towards the increase in unemployment, because according to the OECD unemployment levels amongst under-25s have not fallen but even increased slightly from 22.8% in 2011 to 23.6% last year. If comparison is made here with the EU, Sweden is above the EU average. Previous measures taken to reduce youth unemployment, for example halving income tax,

have remained unsuccessful in the long term. And it remains to be seen whether the EU's job guarantee, which was being discussed at the time of the survey – and is now agreed – and envisages that the young unemployed will be offered work within 4 months, will have the expected impact.

The issue of **environmental protection**, traditionally important in Sweden, has gained in significance once again this year and at 12% was able to take its position – as in 2011 and 2010 – as the second most important challenge after unemployment. The population obviously has increasing misgivings over the government's current energy programme. The programme makes provision for the country's energy supply until 2020 to be managed without any fossil fuels whatsoever and for half of the energy required to be from renewable energies. To be able to achieve these targets Sweden will probably have to settle for still using nuclear energy in the medium term as well – despite all the government's statements on nuclear exit.

## Sweden – main results (2)



The **immigration** and **integration policy** also appear to be agitating people in Sweden more this year than last, as 10% of citizens now consider this issue one of the greatest challenges for the country – a growth of 4 percentage points compared with last year. In the last few years, Sweden has made its mark as one of the most generous countries of asylum in the EU, along with Germany and France, but the country is now battling with the consequences of this policy: towns with high proportions of immigrants such as Malmö in the south are afflicted with ghettoisation (the Rosengård district), increasing crime, riots and displacement of the local population. The immigration authorities complain about an increasingly intolerable situation in the accommodation centres. The integration of immigrants into the labour market is only managed with difficulty and takes a long time. With a target for checking immigration, the right populist Sweden Democrat party has meanwhile become the third strongest political force in the country. The liberal-conservative government under Prime Minister Reinfeldt is under pressure. It has recently distanced itself from the statement of its integration minister Billström, who announced his wish to reduce immigration. It could also be that this statement, which was













made directly before this survey was published, has focused attention on the issue. But the riots in May 2013 – after this survey – will certainly keep this issue of immigration policy as the focal point of public discussion .

Concern about **education policy** has climbed an additional 4 percentage points in Sweden. This is now ranked fifth at 9% and thus demonstrates the highest value and ranking since the start of the survey in 2010. The new (university) education act of 2011, the main aim of which was improving the quality of educational institutions and strengthening performance criteria, has obviously effected many changes, which are now increasingly acknowledged by the population and particularly by parents.

Given the fact that Sweden has invested 6.3% of GDP in the education system and is therefore above the OECD average of 5.7%, it is not surprising that high public attention is paid to the issue. So it is to be expected that public discussion over school education and the ability of the Swedish research centre to compete internationally will also continue to be vigorously pursued.

# Economic indicators at a glance 2013

Selected economic indicators of each country

Nation		Growth rate GDP (real) in % (2012)	Unemployment rate ILO in % (2012)	Unemployment rate ILO in % (2011)	Inflation rate in % (2012)
Belgium		-0,2	7,6	7,2	2,8
Germany		0,7	5,5	6,0	2,0
France		0,0	10,3	9,6	2,0
Italy		-2,4	10,7	8,4	3,0
Netherlands		-1,0	5,3	4,5	2,5
Austria		0,8	4,4	4,1	2,5
Poland		2,0	10,1	9,7	3,6
Russia		3,4*	5,7**	6,6*	5,1
Sweden		0,8	8,0	7,8	0,9
Spain		-1,4	25,1	21,6	2,4
UK		0,3	7,9	8,0	2,8
Ireland		0,9	14,7	14,7	1,7
EU (27)		-0,3	10,5	9,7	2,6

\*c.f. Russia in numbers winter 2013,  
Russian-German Chamber of Foreign Trade

c.f. Eurostat  
(As in April 2013)

c.f. OECD  
(As in April 2013)


c.f. OECD  
(As in April 2013)

c.f. OECD  
(As in April 2013)

\*\*c.f. country information Russia, Foreign Office

# Challenges in Germany 1990-2013

... % of respondents mentioned as the most urgent problem to be solved in Germany: (unaided replies; in %; rounded; multiple responses possible)


 <b>unaided replies</b>	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Unemployment	36	39	39	62	66	61	81	79	86	71	66	59	74	75	77	81	80	67	53	57	66	55	34	32
Price/purchasing power development	7	13	8	9	7	7	4	5	4	2	5	15	14	10	9	11	11	18	37	13	24	33	26	29
Education policy	1	1	1	1	1	1	1	1	3	3	3	4	5	4	6	7	9	10	17	14	14	23	12	16
Economic stability/upturn	7	10	9	14	13	7	7	7	5	4	4	4	11	16	16	12	8	6	7	36	26	14	24	16
Pensions/old age provision	6	4	3	10	9	10	17	15	14	10	17	15	12	18	20	12	18	18	23	9	19	17	13	14
Poverty*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	2	2	3	10	6	5	6	12	13
Social security	5	4	4	11	6	8	9	8	9	7	7	7	8	12	13	7	10	8	13	13	17	25	11	12
Family policy	-	-	-	-	-	-	-	-	-	-	-	4	4	2	2	4	7	9	8	9	7	13	9	10
State finances	3	7	7	8	5	6	7	9	10	8	3	5	3	8	5	3	6	7	2	9	12	8	9	10
Crime	1	2	7	9	18	19	13	9	19	9	10	10	17	10	7	6	6	10	13	8	15	17	7	8
Immigration/integration	6	38	68	31	24	20	18	15	12	11	11	13	13	7	6	7	13	7	9	7	8	16	7	8
Tax policy	2	4	3	3	3	4	5	7	4	4	7	5	7	6	5	5	6	9	11	7	10	12	9	8
Health service	-	2	4	10	4	2	3	4	6	2	6	5	5	15	14	7	15	13	12	10	21	19	11	7
Environmental issues	29	23	16	15	15	23	13	6	5	4	6	11	5	4	3	3	5	16	12	7	10	14	12	7
Politics/government	2	1	3	3	4	1	2	3	3	2	4	3	6	7	8	8	6	7	9	10	10	12	13	7
Base:	3986	2898	3031	2992	2141	2455	2427	2521	2486	2492	2451	2452	2022	1959	1979	1955	1974	1971	2010	2072	2063	2076	2087	2042

\*Never among the most important challenges in previous years



# Challenges in Germany – West Germany 1990-2013


... % of respondents mentioned as the most urgent problem to be solved in Germany: (unaided replies; in %; rounded; multiple responses possible)

 <b>unaided replies</b>	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Unemployment	31	30	31	58	63	58	80	77	84	69	64	55	71	73	75	80	79	64	51	55	64	53	32	28
Price/purchasing power development	5	15	10	11	7	8	4	5	4	2	5	14	12	9	9	11	10	16	37	13	22	31	24	26
Education policy	1	1	1	1	1	1	1	1	3	3	3	4	5	5	7	7	9	10	17	14	14	23	12	17
Economic stability/upturn	-	5	5	12	13	6	6	7	5	4	4	4	11	16	17	12	7	5	6	38	27	14	25	16
Pensions/old age provision	6	3	3	11	10	11	19	17	16	11	19	16	13	19	22	14	20	19	24	9	19	18	13	14
Poverty*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	2	2	3	9	5	5	6	11	13
Social security	2	2	2	10	5	7	8	6	9	6	6	7	7	11	11	7	9	7	12	12	17	24	10	13
State finances	3	8	8	10	6	7	8	10	11	9	3	5	4	8	6	3	6	7	2	10	13	8	10	10
Family policy*	-	-	-	-	-	-	-	-	-	-	-	4	4	2	2	4	7	10	8	9	7	13	9	10
Tax policy	2	5	3	4	3	4	5	8	5	4	8	6	7	7	5	5	7	9	11	7	11	12	10	9
Immigration/integration	7	44	73	35	28	23	20	17	14	10	12	13	15	7	7	6	15	8	10	8	9	17	7	8
Crime	1	2	5	8	16	18	11	8	17	9	8	9	17	9	6	6	6	10	13	7	15	16	7	8
Health service	-	2	5	12	5	2	3	5	6	2	6	5	5	16	15	8	15	13	12	10	21	17	10	8
Environmental issues	32	26	18	17	17	26	15	7	5	5	7	13	6	5	3	3	5	16	14	8	11	14	13	7
Politics/government	1	1	3	3	4	1	1	3	3	2	4	3	6	6	8	8	5	6	9	10	10	11	14	6
Base:	2037	1942	2028	1997	1708	1945	1932	2002	1975	1979	1946	1952	1607	1557	1575	1560	1575	1575	1614	1666	1669	1723	1732	1621

\*Never among the most important challenges in previous years

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 <b>unaided replies</b>	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Unemployment	55	75	73	80	78	74	86	85	92	78	76	79	87	82	84	86	85	76	63	63	73	68	45	44
Price/purchasing power development	17	6	2	2	6	2	4	4	6	3	5	20	14	14	10	13	13	27	39	15	31	43	39	38
Economic stability/upturn	33	29	27	21	11	12	10	8	7	4	3	4	12	14	14	15	10	6	10	29	22	14	18	15
Education policy	3	2	1	1	1	1	0	0	2	3	2	3	4	3	6	5	9	8	16	13	13	22	9	14
Pensions/old age provision	6	6	3	4	5	6	8	7	7	7	8	11	6	13	12	6	12	11	17	9	17	16	13	11
Poverty*	-	-	-	-	-	-	-	-	-	-	-	-	-	-	2	1	3	4	13	6	6	7	12	11
Social security	15	12	11	16	12	13	15	14	11	9	8	9	13	16	20	9	16	12	18	18	17	32	14	11
Crime	2	3	16	13	24	25	19	13	26	9	16	13	16	11	8	8	7	10	13	13	15	21	8	8
Politics/government	6	3	4	5	2	0	2	3	4	1	4	2	7	11	6	8	9	10	12	12	12	17	12	8
Family policy*	-	-	-	-	-	-	-	-	-	-	-	3	3	1	3	4	7	9	6	9	8	12	9	8
State finances	1	1	1	2	1	1	3	3	6	6	1	3	2	6	3	1	5	4	3	8	10	5	4	7
Health service	-	1	1	0	1	1	1	2	5	2	4	5	5	10	11	4	15	12	10	12	21	25	12	6
Environmental issues	16	9	6	6	6	11	6	4	3	1	2	7	4	0	2	4	5	14	5	3	6	14	7	4
Tax policy	0	1	1	1	1	2	3	4	2	3	3	4	4	2	3	3	3	5	8	5	7	11	7	4
Care of aged	-	-	-	-	-	-	-	-	-	0	1	0	0	0	1	0	1	3	6	2	3	3	5	2
Base:	1949	956	1003	995	433	510	495	519	511	513	505	500	415	402	404	395	399	396	396	406	394	353	355	421

\*Never among the most important challenges in previous years