

EN

EN

EN



EUROPEAN COMMISSION

Brussels, 4.4.2011
SEC(2011) 380 final
VOLUME 3

ANNEX 2

COMMISSION STAFF WORKING DOCUMENT

IMPACT ASSESSMENT

Accompanying document to the

COMMUNICATION FROM THE COMMISSION TO THE COUNCIL, THE EUROPEAN
PARLIAMENT, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE
COMMITTEE OF THE REGIONS

TOWARDS A SPACE STRATEGY FOR THE EUROPEAN UNION THAT BENEFITS ITS
CITIZENS

SEC(2011) 381 final
COM(2011) 152 final



Flash Eurobarometer



European
Commission

Space activities of the European Union

Summary

Fieldwork: July 2009

Publication: October 2009

Flash Eurobarometer 272 – The Gallup Organisation

This survey was requested by the Directorate General Enterprise and Industry and coordinated by Directorate General Communication.

This document does not represent the point of view of the European Commission. The interpretations and opinions contained in it are solely those of the authors.

Flash EB Series #272

Space activities of the European Union

Conducted by
The Gallup Organisation, Hungary
upon the request of Directorate General
Enterprise and Industry



Survey co-ordinated by
Directorate General Communication

This document does not represent the point of
view of the European Commission.
The interpretations and opinions contained in it
are solely those of the authors.

THE GALLUP ORGANISATION

Web-site for downloading the document:
http://ec.europa.eu/public_opinion/index_en.htm

At a glance

The Flash Eurobarometer *Space activities of the European Union* (Flash N° 272) was conducted in order to examine EU citizens' opinions and to assess: a) their awareness of space activities of Europe and the European Union, b) their perception of these activities, and c) their general attitude toward space exploration.

The survey fieldwork was conducted between 3 and 7 July 2009. Over 25,000 randomly selected citizens aged 15 years and over were interviewed in the 27 EU Member States. Interviews were predominantly carried out by fixed-line telephone, reaching ca. 1,000 EU citizens in each country (the size of the sample was 500 in Luxembourg, Malta and Cyprus).

Although interviews were predominantly carried out by telephone via fixed-lines, interviews were also conducted via mobile telephones and by face-to-face (F2F) interviews as appropriate. This methodology ensures that results are representative of the EU27 Member State population. In most of the countries where a large share of residents could not be contacted by fixed-line telephones (as many do not subscribe to such service), a mixed-mode methodology was employed to ensure that these individuals were questioned and this was done either through F2F interviews or by including mobile telephones in the sampling frame. For this survey, mobile telephone interviews were conducted in Austria, Belgium, Finland, Italy, Portugal and Spain, and some F2F interviews in the Czech Republic, Lithuania, Hungary, Slovakia, Latvia, Romania, Estonia, Bulgaria and Poland.

To correct sampling disparities, a post-stratification weighting of the results was implemented, based on key socio-demographic variables.

Key findings include:

- The majority of European Union citizens regard European space activities as important from the perspective of the EU's future global role: one in five citizens considered such activities *very* important (20%) and a further 43% felt that space activities are important.
- When asked about the importance of developing various space-based applications for Europe, EU respondents were most keen on (further) developing environmental/natural monitoring systems: 58% found this *very* important. Regarding other services the mood remained generally positive; the proportion considering these *very* important remains in the one-quarter to one-third range (satellite-based communications, positioning system and satellite-based monitoring to improve citizens' security)
- EU citizens generally acknowledged that there may be various benefits related to space exploration (it may add to human knowledge, it may help to protect our planet, it may help to find new raw materials and energy sources and it may boost economy through technological innovations), and showed a widespread support to extend EU activities in space exploration.
- 26% of all Europeans thought that the EU should *definitely* do more in the field of space exploration, and 38% felt that it should *perhaps* put more emphasis on this field. 30% provided a negative response to this question (28% opposed more involvement and 2% indicated that it does not matter for them whether or not the EU is more active in space exploration).
- Generally speaking there is balance between EU citizens that – in these times of economic and financial crisis – support and do not support an increase in the EU budget devoted to space activities. The 20% who felt that more budgetary resources should be allocated to space activities were outweighed – although only by a slim margin – by those who felt that the EU should reduce such spending (23%). The plurality (43%) felt that the current budget should be maintained. Overall there is strong support for EU funding of space activities at its current level (43%) or at increased level (20%).

At a glance

The Flash Eurobarometer *Space activities of the European Union* (Flash N° 272) was conducted in order to examine EU citizens' opinions and to assess: a) their awareness of space activities of Europe and the European Union, b) their perception of these activities, and c) their general attitude toward space exploration.

The survey fieldwork was conducted between 3 and 7 July 2009. Over 25,000 randomly selected citizens aged 15 years and over were interviewed in the 27 EU Member States. Interviews were predominantly carried out by fixed-line telephone, reaching ca. 1,000 EU citizens in each country (the size of the sample was 500 in Luxembourg, Malta and Cyprus).

Although interviews were predominantly carried out by telephone via fixed-lines, interviews were also conducted via mobile telephones and by face-to-face (F2F) interviews as appropriate. This methodology ensures that results are representative of the EU27 Member State population. In most of the countries where a large share of residents could not be contacted by fixed-line telephones (as many do not subscribe to such service), a mixed-mode methodology was employed to ensure that these individuals were questioned and this was done either through F2F interviews or by including mobile telephones in the sampling frame. For this survey, mobile telephone interviews were conducted in Austria, Belgium, Finland, Italy, Portugal and Spain, and some F2F interviews in the Czech Republic, Lithuania, Hungary, Slovakia, Latvia, Romania, Estonia, Bulgaria and Poland.

To correct sampling disparities, a post-stratification weighting of the results was implemented, based on key socio-demographic variables.

Key findings include:

- The majority of European Union citizens regard European space activities as important from the perspective of the EU's future global role: one in five citizens considered such activities *very* important (20%) and a further 43% felt that space activities are important.
- When asked about the importance of developing various space-based applications for Europe, EU respondents were most keen on (further) developing environmental/natural monitoring systems: 58% found this *very* important. Regarding other services the mood remained generally positive; the proportion considering these *very* important remains in the one-quarter to one-third range (satellite-based communications, positioning system and satellite-based monitoring to improve citizens' security)
- EU citizens generally acknowledged that there may be various benefits related to space exploration (it may add to human knowledge, it may help to protect our planet, it may help to find new raw materials and energy sources and it may boost economy through technological innovations), and showed a widespread support to extend EU activities in space exploration.
- 26% of all Europeans thought that the EU should *definitely* do more in the field of space exploration, and 38% felt that it should *perhaps* put more emphasis on this field. 30% provided a negative response to this question (28% opposed more involvement and 2% indicated that it does not matter for them whether or not the EU is more active in space exploration).
- Generally speaking there is balance between EU citizens that – in these times of economic and financial crisis – support and do not support an increase in the EU budget devoted to space activities. The 20% who felt that more budgetary resources should be allocated to space activities were outweighed – although only by a slim margin – by those who felt that the EU should reduce such spending (23%). The plurality (43%) felt that the current budget should be maintained. Overall there is strong support for EU funding of space activities at its current level (43%) or at increased level (20%).

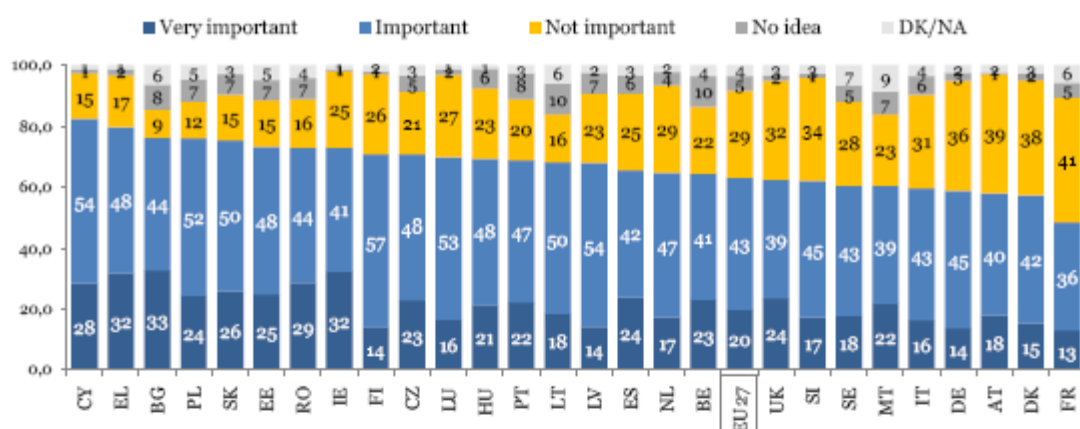
Strategic importance of space research in Europe

The majority of European Union citizens regard European space activities as important from the perspective of the EU's future global role: one in five citizens considered such activities *very important* (20%) and a further 43% felt that space activities are important in this respect. In total, almost two-thirds of Europeans share the view that space activities are important for the future international position of the European Union.

Those considering space activities as important were in the majority in each Member State of the EU. Even in those countries where the proportion of sceptical citizens was the highest (France: 41%, Austria: 39%, Denmark: 38%), most people believed that such activities were important for the EU's future global role.

The ratio of those considering such activities as “very important” remained at or below one-third of all interviewees, with the highest proportion in Bulgaria (33%), Greece (32%) and Ireland (32%). Still, in 22 Member States those who regarded European space activities important or very important exceeded 60%, signalling a positive mood behind initiatives in this area. The general appreciation (using an indicator that combines the “important” and “very important” replies) was highest in Cyprus (82%), Greece (80%) and Bulgaria (77%).

Importance of space activities for the future international position of the EU



Q1. Do you think space exploration and other space activities are important for the future international position of the European Union?
Base: all respondents, % by country

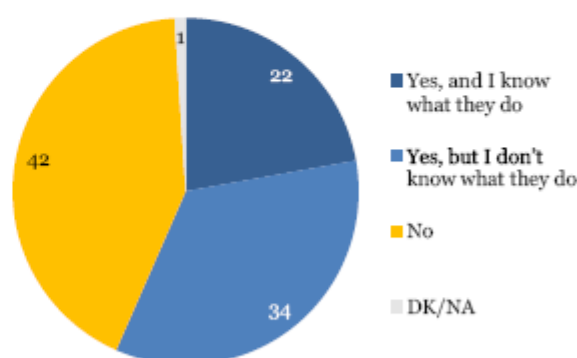
The vast majority of Europeans agree that **technology transfers from the space industry can contribute to innovation in terrestrial applications** (24% agreed strongly and 50% to some extent). Only 16% expressed scepticism at this idea. In addition, almost two-thirds agreed that **space activities may contribute to the success of the European economy at large**: 16% agreed strongly and 48% agreed that space industry activity can boost European competitiveness, economic growth and create jobs in Europe. Pessimism regarding the latter aspect remained at 28% (almost 3 in 10 respondents).

Satellite-based services

European Union countries independently as well as the European Space Agency (ESA) operate a number of satellites to provide information for terrestrial applications (surface/ meteorological/ environmental monitoring, broadcasting and communication, positioning, security applications, etc.).

The majority of Europeans indicated that they are aware that such European Earth Observation satellites exist (56%), and 22% were also confident that they knew what these satellites are used for (34%, albeit aware of their existence, were not sure what function they fulfil). 42% were not aware of (at least the specifically “European”) Earth Observation satellites.

Awareness of the European Earth Observation satellites

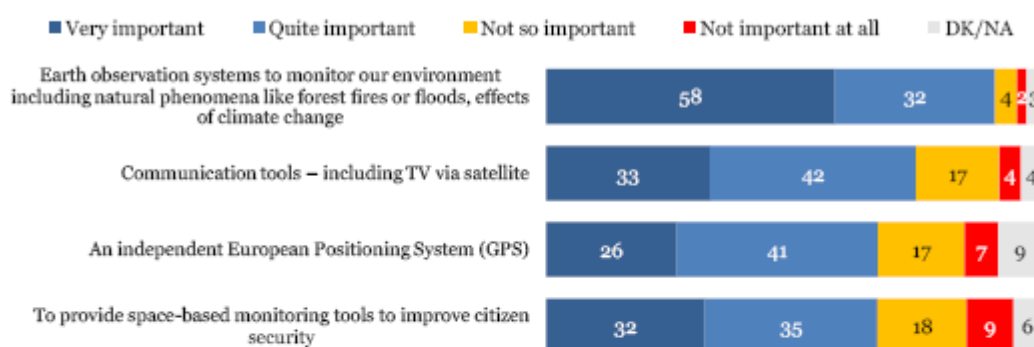


Q3. Have you heard about the European Earth Observation satellites?
Base: all respondents, % EU27

When asked about the **importance of developing various space-based applications for Europe**, EU respondents were most keen on (further) developing environmental/natural monitoring systems: 58% found it *very* important that Europe has observation systems able to monitor natural and environmental threats (a mere 6% found this unimportant).

When it comes to other applications, the mood remained positive with about two-thirds finding these important or very important, but except for Earth observation systems, at European level those who consider the development of this applications “very important” was lower than those that responded that they were important. Other applications mentioned concerned communications (regarded as at least quite important by 75%), positioning system (67%) and monitoring to improve citizens’ security (67%).

Development of various space applications for Europe



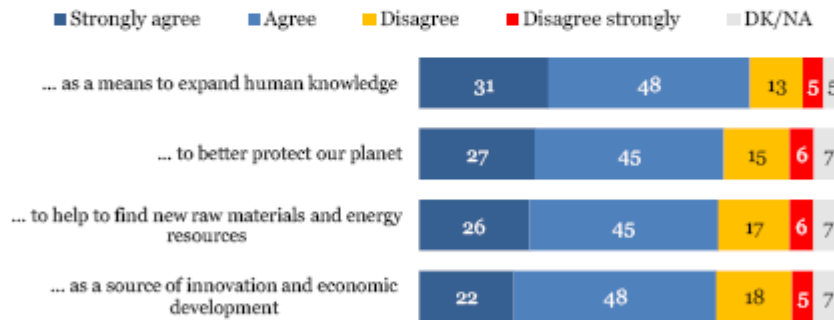
Q4. How important is in your view to develop the following space applications for Europe?
Base: all respondents, % EU27

Overall, 27% found it unimportant to develop satellite-based applications to improve citizens’ security, and 24% had a similar opinion about an independent European positioning system. 21% did not think that European satellite-based communication services should be (further) developed.

Space exploration

European citizens tend to link space research and exploration to more abstract benefits. 79% saw it as important due to its contribution to the expansion of human knowledge (about three in ten of those interviewed agreed strongly). 72% believed that space exploration may add to mankind's ability to protect the Earth, 71% believed that space exploration may lead to accessing new energy resources and raw materials, and 70% thought that space research can be a source of innovation and economic development.

Space exploration is important ...



Q5. Please tell me how much do you agree or disagree with the following statements:
Base: all respondents, % EU27

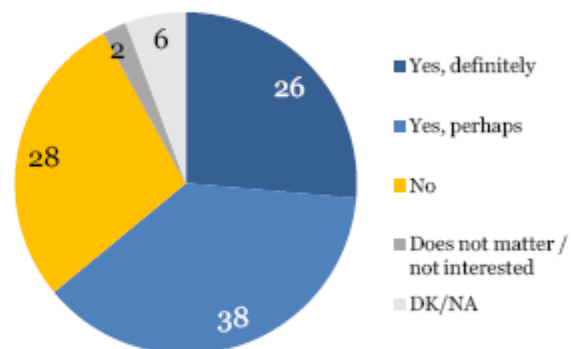
Less than a quarter of respondents disagreed that space exploration is important to achieve the stated objectives, as shown above.

The question of whether the European Union should do more in the field of space exploration profoundly divides European citizens. 26% believe that the EU should *definitely* do more, while a similar number of respondents oppose further involvement (28%). A relative majority (38%) is not entirely convinced about the necessity, but feels that the EU should *perhaps* put more emphasis on this field.

Overall, this signals that while a majority favours EU action in the field of space exploration, only some of the supporters seem to be whole-heartedly committed to this. 30% provided an outright negative response to this question (28% opposed more involvement and 2% indicated that it does not matter for them whether or not the EU is more active in space exploration).

Looking at the results in the various Member States, it appears that the highest levels of support for increased space exploration activities are found in countries that were most likely to acknowledge the importance of the various goals of space exploration: Bulgaria and Greece; in both countries more than half of those interviewed (55%) opted *definitely* for the EU being more active in this area. On the other hand, only about one in five respondents expressed full support in a number of various Member States, including Sweden (16%), France, Finland (both 19%), the Netherlands, Lithuania, Belgium (20% each) as well as in Italy, Slovakia and the Czech Republic (all 21%).

Should the European Union do more in the field of Space Exploration?



Q6. Should the European Union do more on the field of Space Exploration?
Base: all respondents, % EU27

Nevertheless, the definite “no” answer was dominant only in the Netherlands (40%) and scored tied with “perhaps yes” in France (37%), Italy (35%) and Belgium (34%).

Overall there is **strong support for EU funding of space activities** at its current level (43%) or at increased level (20%). The 20% who felt that more budgetary resources should be allocated to space activities were outweighed – although only by a slim margin – by those who felt that the EU should reduce such spending (23%). (The survey was conducted under circumstances characterised by significant economic problems in essentially all Member States of the EU, resulting from the ongoing global economic and financial crisis.) Finally, 15% could not formulate an opinion or were not interested in answering the question.

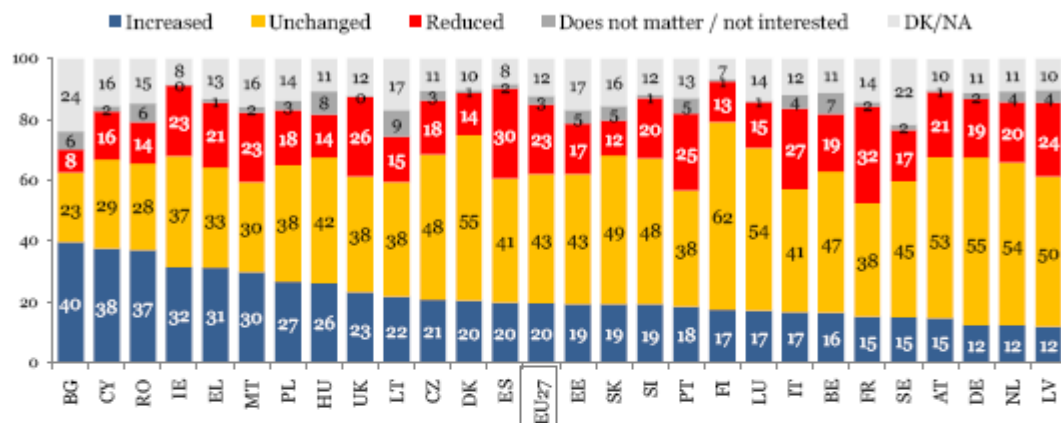
Only in Romania, Cyprus and Bulgaria was stability of the allocated funds *not* the most frequent answer (with most citizens supporting an increased budget) – in the rest of the countries the largest segment of the public tended to prefer maintaining the current EU space budget.

Reducing the European budget for space activities is an option shared by only 23% of the Europeans, with the highest scores recorded in France (32%), Spain (30%), Italy (27%) and United Kingdom (26%) and the lowest in Bulgaria (8%), Slovakia (12%) and Finland (13%).

While generally this study found only cosmetic variations of attitudes across Member States (that is, in most questions discussed thus far the predominant EU27 patterns were replicated in all Member States to a varying extent), this question brought up a divided picture across EU countries.

In five Member States those who felt that more funds should be allocated to space activities on EU level outnumbered those who rather desired reduction of such funds *by at least 10 percentage points*: Greece (increase: 31%, reduction: 21%¹), Hungary (i: 26%, r: 14%), Cyprus (i: 38%, r: 16%), Romania (i: 37%, r: 14%), Bulgaria (i: 40%, r: 8%).

The share of the European budget to cover all space activities including space exploration should be...



Q7. There are various budget priorities for the European Union. According to you, the share of the European budget to cover all space activities including space exploration should be:
Base: all respondents, % by country

In contrast, an opposite difference with a similar order of magnitude (10 percentage points) was also found, in four Member States: France (i: 15%, r: 32%), Latvia (i: 12%, r: 24%), Spain (i: 20%, r: 30%) and Italy (i: 17%, r: 27%).

¹ percentages for the other countries are provided respectively

