

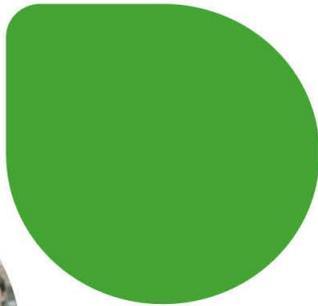
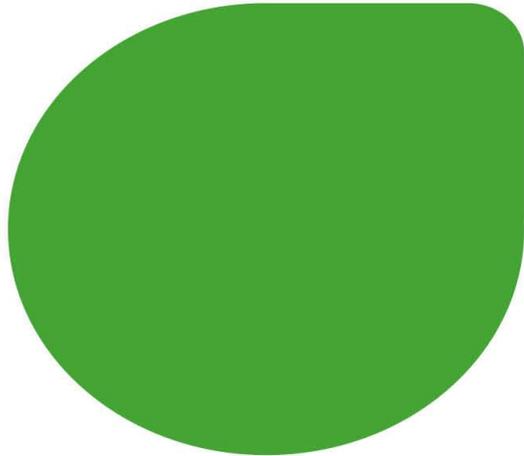
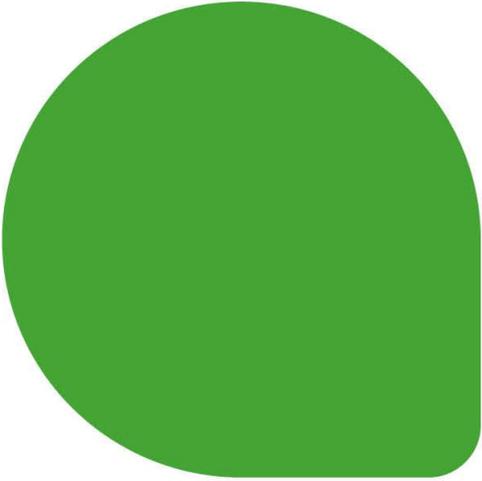
**ANNUAL SURVEY REPORT:  
REPUBLIC OF MOLDOVA**

2<sup>nd</sup> Wave (Spring 2017)

**OPEN Neighbourhood —  
Communicating for a stronger partnership:  
connecting with citizens across the Eastern  
Neighbourhood**

June 2017

**#  
STRONGER  
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**act**

*The surveys have been carried out in the six Eastern Partner countries by  
ACT LLC and their network partners*

# 1. Background

Between March and May 2017, a second wave of annual surveys was carried out across the six Eastern Partner countries (Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine). The research was conducted within the framework of the EU-funded “OPEN Neighbourhood — Communicating for a stronger partnership: connecting with citizens across the Eastern Neighbourhood” (‘**EU NEIGHBOURS east**’) project.

The ‘**EU NEIGHBOURS east**’ project aims to increase the understanding of EU support in the Eastern Partnership (EaP) countries through improved communication. The **overall objective** of the project is to contribute to the improvement of public perception of the EU, as well as to a better understanding of European policies and their impact through the regional and bilateral EU support and cooperation programmes in Eastern Partnership countries.

The project is developing information and communication materials, carry out awareness-raising and information campaigns, and assesses the perception of the EU and its support through opinion polling and media monitoring.

As part of the opinion polling strategy, the purpose of the annual surveys is to investigate the opinion and the level of information that citizens of the EaP countries have about the EU in general and, in particular, about EU-funded cooperation and development programmes/projects. In order to monitor changes over time, the surveys are being carried out annually from 2016 until 2019.

This document presents the results of the **Annual Survey – 2<sup>nd</sup> wave** conducted in **Moldova**<sup>1</sup> and covers the following broad topics:

- General perceptions about the EU
- Values associated with the EU
- Assessment of EU relations with Moldova
- Awareness of financial support provided by the EU and assessment of its effectiveness
- Sources of information
- Country evaluation and future expectations

Alongside an analysis of the results of the 2<sup>nd</sup> wave of the survey, this document provides a comparison between the findings of the 2016 and 2017 surveys where relevant.

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<sup>1</sup> A similar report has been produced for each EaP country. Additionally, a macro-area report is being prepared that will compare the results across the region.

## 2. Research methodology in brief

The survey was conducted in April 2017, following the same methodology adopted in the previous round of data collection (Spring 2016). 1,000 face-to-face interviews were carried out and respondents were randomly selected according to the sampling strategy described below. In order to estimate the characteristics of the target population (i.e. general population aged 15 and over and living in Moldova), the sampling weights were calculated by applying a specifically designed estimation procedure.

### ***Sampling strategy***

The survey used a two-stage sample design with settlements as primary sampling units (PSUs) and individuals as secondary units.

In the first stage, the sample was composed of 30 units (cities/towns) and it was stratified by unit size, expressed in terms of population, level of urbanisation and geographical area. Three groups of settlements<sup>2</sup> and three areas<sup>3</sup> were used for a total of nine strata. Within each stratum, three or four sample units were randomly selected, with the probability of their selection proportional to their size. A compromise between an equal allocation and a proportional allocation was applied in order to distribute the secondary sampling units (1,000 individuals) by strata. In each selected settlement, a minimum of 20 interviews were carried out. The additional interviews that were carried out were distributed proportionally to the PSU's size.

The second-stage sample was also stratified. In this case, gender and age<sup>4</sup> were considered for a total of six strata. In each selected settlement, secondary sampling units were distributed proportionally among strata.

The individuals to be interviewed were selected randomly, according to the random walk<sup>5</sup> principle.

### ***Estimation phase***

An estimation procedure was carried out in order to estimate the characteristics of the target population from the survey respondents. The technique used for the construction of the survey estimator (i.e. sampling weights) was based on the predictive approach to regression estimator. In particular, a calibration estimator was built based on the general category of model-assisted estimators (Deville and Särndal 1992). The procedure included the computation of a sampling design weight for each sampled respondent by calculating the inclusion probability of both primary and secondary sampling units (i.e. settlements and individuals) and the calibration of the sampling design weights to known population totals. Three new calibration variables (education level, religious faith and mother tongue) were added to those used in the previous wave (settlement size, gender, age, employment status and geographical area) to produce calibrated weights, and therefore to improve the quality of survey findings, as they allowed for a better correction of any selection bias. Nevertheless, it is worth mentioning that the introduction of additional auxiliary variables in the estimation procedure could occasionally explain part of the difference between the estimates of the two years.

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<sup>2</sup> Groups of settlements: 1) Small settlements (less than 20,000 inhabitants); 2) Medium-sized settlements (20,000-150,000 inhabitants); 3) Large settlements (above 150,000 inhabitants)

<sup>3</sup> Geographical areas: 1) Centre (Dubasari, Glodeni, Nisporeni, Telenesti, Criuleni, Calarasi, Straseni, Ungheni, Orhei); 2) North (Soldanesti, Donduseni, Rezina, Ocnita, Riscani, Briceni, Edinet, Drochia, Floresti, Falesti, Singerei, Soroca, Balti); 3) West (Hrodna and Brést Regions); 4) South (Basarabasca, Taraclia, Leova, Cimislia, Cantemir, Stefan Voda, Anenii Noi, Causeni, Ialoveni, Hincesti, Cahul, Gagauzia)

<sup>4</sup> Age groups: 1) 15-34 years; 2) 35-54 years; 3) 55 or more years

<sup>5</sup> This technique is based on very precise instructions for the interviewers. First, a starting point should be selected for each cluster. Second, it is necessary to define a step. A step can be defined according to the size of the cluster. The third important consideration is the movement route. Each interviewer should have detailed instructions on how to follow the route in rural settlements and urban areas. Each interviewer should begin from the starting point, according to the predefined step size and route, and contact a total predefined number of households.

# 3. Survey findings

## 3.1. Executive summary

### *General perceptions of the EU*

- The awareness of the EU mostly conjures up a positive or neutral image (43% positive, 39% neutral). Compared to 2016, the 'fairly positive' attitude seems to have decreased at the expense of a more neutral stance.
- Between 65% and 75% of Moldovans strongly – or very strongly – believe that the EU represents such values as economic prosperity, human rights, freedom of religion/speech/media and individual freedom, respect for other cultures, and rule of law. Values that are strongly associated with the EU are also important at a personal level. It is interesting to note that the absence of corruption, which scored the weakest association with the EU, was rated among the top three values at a personal level.
- The EU is the most trusted foreign institution in Moldova (54%), followed by the Eurasian Economic Union (44%).
- The attitude, as well as the level of trust, towards the EU is highly linked to the citizens' mother tongue. Moldovans with Russian as their mother tongue tend to be more neutral or negative towards the EU compared to those with Romanian as their mother tongue.

### *EU relations with Moldova and awareness of EU financial support*

- Nearly 70% of Moldovans describe their country's relationship with the European Union as fairly or very good; these findings are consistent with the 2016 survey.
- Nearly 80% of Moldovans are aware of EU support to their country, although the proportion of people that consider it to be effective, or very effective, has decreased from 45% to 37% when compared to 2016.
- One in two citizens know about specific EU-funded programmes. The most recalled programs related to infrastructure projects (65%).
- Just as in 2016, only a very low proportion of Moldovans believed that the support provided by other countries/organisations exceeded that provided by the EU. However, between 19% and 42% of the population did not answer the question.
- Moldovans were more reserved than in 2016 in assessing the benefits stemming from the EU's support. When asked about the benefits of the EU's support, Moldovans mainly mentioned tourism, infrastructure, access to products/services, education, trade and the health-care system. However, they appeared to be less enthusiastic than last year.
- Corruption tops the list of the areas least supported by the EU. Moldovans also named the healthcare system, economic development and employment as areas where more support is needed.

### *Attitudes towards the EU: a snapshot*

- Unsurprisingly, individuals that have a positive image of the EU are also more likely to trust the Union, rate its relationship with their country positively and acknowledge the effectiveness of its financial support, compared to those with a neutral and negative stance. Awareness of the financial support of the EU appears to be more loosely linked to attitudes.
- Moldovans who have a positive image of the EU tend to strongly associate the Union with human rights, individual freedom and economic prosperity. Those with a negative image also named respect for other cultures and freedom of religion as aspects they associate with the EU, which may be because minorities, such as Russian mother tongue community, tends to be more negatively oriented. The least associated values – such as absence of corruption, peace, security and stability, and honesty and transparency – were the same for all three populations (those with negative, positive and neutral images of the EU).
- All three populations believe that the Union has encouraged tourism and access to more products/services very much or ‘fairly’. Corruption, law enforcement and the justice system were the least mentioned benefits by all populations, and negatively oriented individuals were the most critical.

### *Media usage as sources of information*

- Television is the most popular media channel in Moldova – 45% always watch it, 32% often and 16% sometimes. The second most commonly used source of information is word of mouth – as stated by 80% of the population – followed by the internet and social media (69% and 50% respectively).
- Four out of five Moldovans rely on media in national language. National and foreign media in Russian are also very common, while foreign – and national – media in other languages are far less popular: nearly 70% never use such media.

### *Sources of information about the EU*

- 67% of Moldovans had heard about the European Union in the last three months as compared to 80% in 2016. Most of the information they heard/saw came from television (79%) and the internet (44%).
- Most of the population felt that the national media represented the European Union fairly positively (53%) or very positively (7%), although their evaluation was less positive than in 2016.
- Half of the population stated that the information they read, watch or access online helps them to have a better understanding of the Union. However, nearly 40% of Moldovans rated it as ‘not helpful’ – and the rest (8%) did not have an opinion.
- Information on the EU is accessed frequently or very frequently by only a very small share of the population (21%), in line with the 2016 findings. Nearly 70% access information in Romanian, around a quarter in Russian and 7% in English. The most commonly searched topics are generic information about the EU and social and political news.
- Active searching for information mostly relies on the internet (82%) and TV (55%). Information was rated as accessible, user-friendly and comprehensive by nearly all the population. Around 80% of citizens also think of the information as very or fairly reliable and trustworthy.

### *Source of information and attitude towards the EU*

- Moldovans who are frequent social media and internet users are on average more aware of and positive about the EU's role. The most controversial issue for them appears to be the effectiveness of EU support, as for every two citizens that are satisfied there are three who are not. Traditional media users are less likely to be aware and satisfied of the EU's financial support, to trust the EU and to have a positive image, but just as likely to consider the EU-Moldova relationship to be good.
- Almost all frequent users of media in national and foreign languages (other than Russian) have a neutral or positive image of the EU, while three out of four Russian media share the same point of view. The effectiveness of the EU's support was the issue on which citizens were more critical – irrespective of the language of the media they frequently access.

### *View of Moldova's current situation*

- Just as in 2016, Moldovans do not show a great deal of trust in national, regional and local institutions, or in political parties. However the share of individuals that tend to trust the Government has increased compared to last year. Religious authority is the most trusted institution in Moldova (66%).
- Dissatisfaction towards the political situation in their country becomes even more evident when citizens are asked to rate the current functioning of democracy: 83% of Moldovans are not satisfied with it.
- As in 2016, the most widely acknowledged elements of democracy that apply to Moldova are gender equality (52%), protection of the rights of minorities (46%), freedom of speech (40%) and freedom of the media (38%). The most pressing issue appears to be corruption, as 93% of Moldovans feel that more work is necessary to bring democracy to an adequate level.

### *Future expectations*

- Overall Moldovans are not particularly optimistic towards their country's future or their own future – although they are significantly more optimistic about the latter (65% versus 43%). Expectations over Moldova's future, as well as personal hopes, are in line with the 2016 survey.
- The most pressing problems for around half of Moldovan residents were low salaries/pensions, corruption and unemployment.

### *Views of the country and attitude towards the EU*

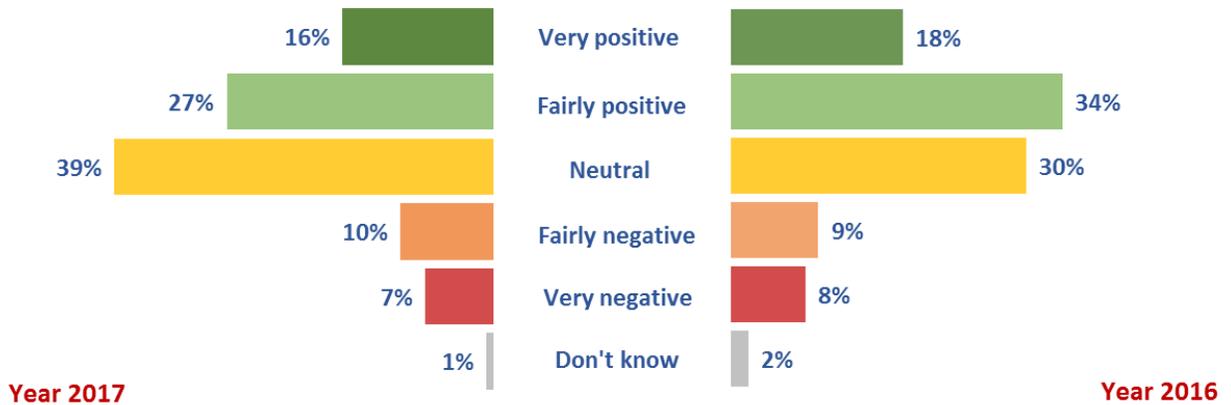
- Individuals that have a negative image of the EU are more likely to be negatively oriented for all the assessed indicators, except for trust in religious authority, political parties and the government. Positively and neutrally oriented citizens tend to share the same views, although those who have a positive image are more optimistic about their country's future and their own personal future.
- Almost everyone, regardless of their attitude towards the EU, indicated the same pressing problems in Moldova, with low salaries/pensions, corruption, unemployment and low living standards/poverty being the most important issues. Those who have a negative or neutral stance seem slightly more concerned about salaries and pensions, while positive individuals are mostly worried about corruption.

## 3.2. Perceptions about the European Union

### 3.2.1. General perceptions about the EU

In 2017, the European Union mostly conjures up a positive or neutral image of the EU for Moldovans: 43% feel positive towards the EU (27% fairly positive and 16% very positive) and a slightly smaller share feel neutral about it (39%) (fig. 1). However, the fairly positive attitude towards the EU seems to have decreased at the expense of a more neutral stance, compared to 2016. The share of negatively oriented citizens is fairly stable (10% fairly negative and 7% very negative), as well as the share of those who do not have an opinion (1%). An addition, almost everyone is aware of the EU, just like in 2016.

**FIGURE 1 – Do you have a very positive, fairly positive, neutral, fairly negative or very negative image of the European Union? (Q2.1)**



The attitude of Moldovans towards the EU appears to be directly related to their mother tongue (tab. 1). In particular, it appears that the community of Russian speakers is much more neutrally and negatively oriented towards the EU than the Romanian speakers (61% neutral and 24% negative compared to 37% and 11%). Older generations (aged over 55 years) are the most negatively disposed towards the European Union (29% of citizens in this age group have a negative image of the EU compared to 14% and 11% of those aged 35-54 and 15-34 respectively), while younger generations, residents of the capital and the centre<sup>6</sup> of the country and in particular highly educated Moldovans tend to have the most positive image: 65% of highly educated people have a positive image of the EU compared to 47% and 34% of those with medium and low levels of education. Neutral attitudes were most common among residents of medium-sized cities and the north of the country (all above 50%).

<sup>6</sup> It should be noted that the only large city in Moldova with more than 150,000 inhabitants is the country's capital, Chişinău, which is located in the centre. Therefore, the behaviour of the capital's residents and inhabitants of the centre of the country mostly coincides.

**TABLE 1 – Perception of the EU**

Q2.1. Do you have a very positive, fairly positive, neutral, fairly negative or very negative image of the European Union?						
		Positive	Neutral	Negative	Don't know	Total
<b>Settlement size</b>	Capital	54%	30%	15%	1%	100%
	Between 20,000 and 150,000 inhabitants	30%	52%	18%	0%	100%
	Less than 20,000 inhabitants	42%	40%	17%	1%	100%
<b>Gender</b>	Male	43%	37%	18%	2%	100%
	Female	43%	41%	15%	1%	100%
<b>Age group</b>	15-34 years	56%	33%	11%	1%	100%
	35-54 years	35%	50%	14%	1%	100%
	55 years & above	34%	36%	29%	1%	100%
<b>Education level</b>	Low level	34%	48%	17%	1%	100%
	Medium level	47%	34%	17%	2%	100%
	High level	65%	23%	12%	0%	100%
<b>Employment status</b>	Employed	44%	44%	12%	0%	100%
	Unemployed or temporarily not working / inactive	42%	37%	20%	1%	100%
<b>Mother tongue</b>	Romanian	51%	37%	11%	1%	100%
	Russian	15%	61%	24%	0%	100%
<b>Geographical area</b>	Centre	59%	30%	11%	0%	100%
	North	26%	52%	20%	2%	100%
	South	36%	41%	22%	1%	100%
<b>Total</b>		<b>43%</b>	<b>39%</b>	<b>17%</b>	<b>1%</b>	<b>100%</b>

Between 65% and 75% Moldovans strongly – or very strongly – believe that the EU represents such values as economic prosperity, human rights, freedom of religion/speech/media and individual freedom, respect for other cultures and rule of law. Conversely, absence of corruption scored the weakest association with the EU – only 40% of citizens strongly or very strongly linked it to the Union, as compared to the 53% share of citizens who weakly or very weakly associated it with the EU. Peace, security and stability, honesty and transparency and equality and social justice were also less strongly associated with the EU.

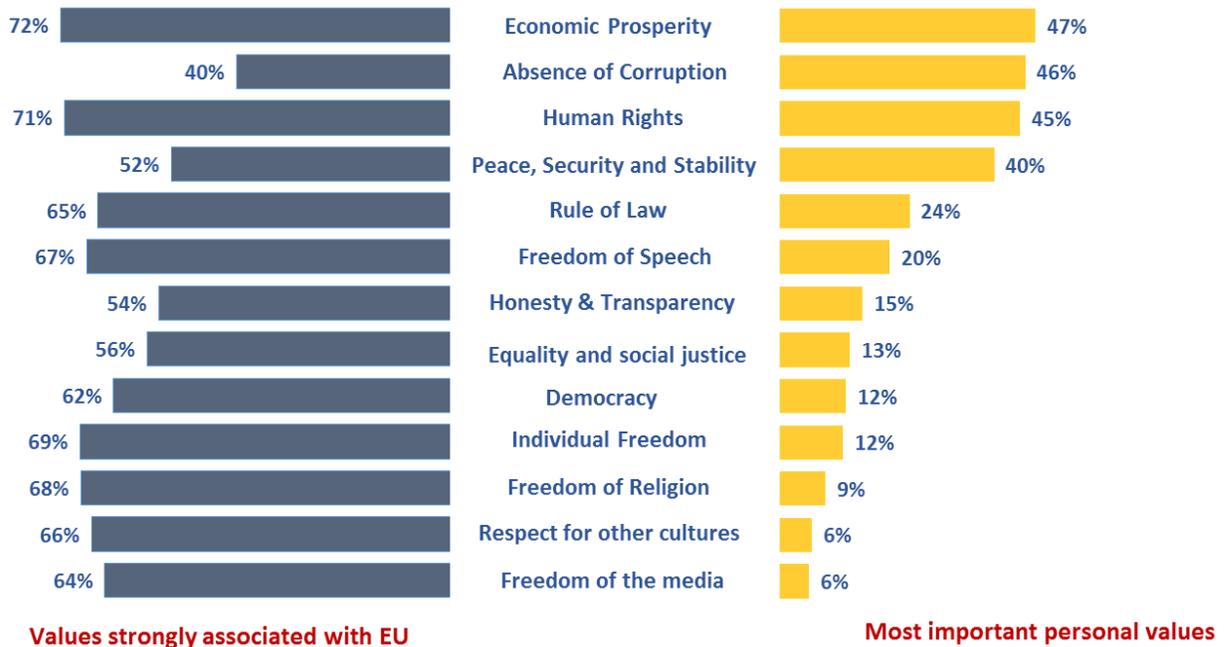
The findings are consistent with last year's survey, although the number of Moldovans reporting weaker associations with the EU seems to have slightly increased.

**TABLE 2 – Values associated with the EU**

Q2.3. To what extent does the European Union represent the following values for you?						
	Very strong	Strong	Weak	Very weak	Don't know	Total
<b>Economic prosperity</b>	22%	50%	14%	7%	7%	100%
<b>Human rights</b>	22%	50%	18%	5%	5%	100%
<b>Individual freedom</b>	19%	50%	19%	5%	7%	100%
<b>Freedom of religion</b>	17%	51%	18%	4%	10%	100%
<b>Freedom of speech</b>	17%	50%	17%	6%	10%	100%
<b>Respect for other cultures, minorities</b>	13%	53%	21%	6%	7%	100%
<b>Rule of law</b>	17%	48%	21%	5%	9%	100%
<b>Freedom of the media</b>	16%	48%	21%	5%	10%	100%
<b>Democracy</b>	19%	44%	22%	6%	9%	100%
<b>Equality and social justice</b>	16%	40%	29%	8%	7%	100%
<b>Honesty and transparency</b>	10%	44%	27%	10%	9%	100%
<b>Peace, security and stability</b>	15%	37%	32%	11%	5%	100%
<b>Absence of corruption</b>	9%	31%	37%	16%	7%	100%

Figure 2 compares the values that are strongly associated with the EU with the most important personal values for Moldovans<sup>7</sup>. Firstly, it can be said that – aside for the absence of corruption – most citizens tend to strongly or very strongly associate all values with the EU. It is also interesting to note that, although it scored the lowest association with the EU (40%), absence of corruption is quite important at a personal level, as it was rated among the top three values by 46% of Moldovans. The other most important values at a personal level are economic prosperity (47%) and human rights (45%) and they are both among the three values most-associated with the EU (72% and 71% respectively). Apparently, freedom of the media, respect for other cultures and freedom of religion are considerably less essential, as they were all rated as important personal values by less than 10% of Moldovans.

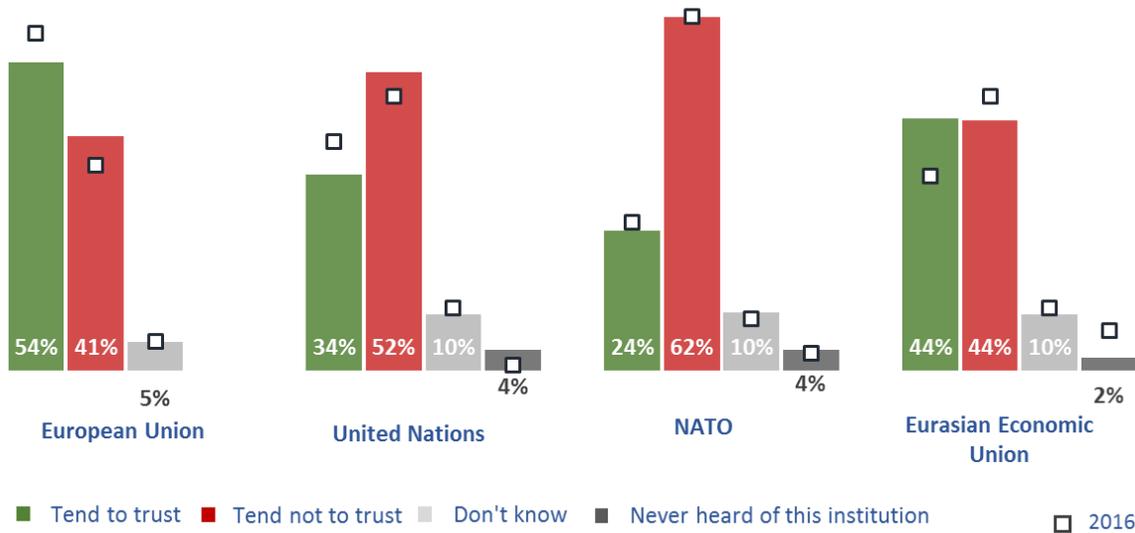
**FIGURE 2 – Values strongly or very strongly associated with the EU (Q2.3) & Most important personal values (Q4.7)**



Perceptions of the EU were also assessed through an open-ended question in which respondents were asked to name the first issues that came to their mind when thinking of the EU. First, it should be noted that nearly one in four citizens did not answer the question, mostly because they had nothing to say (15%) or it was too hard to answer (10%). Among those who had something to say and knew how to answer, 40% of Moldovans mentioned positive factors such as economic prosperity (21%), development/progress (12%) and generic support (7%). Lower shares of citizens also mentioned positive values such as rule of law/human rights/equality, employment, sport and culture, peace and stability, freedom and European integration. Nearly one in five citizens, on the other hand, spontaneously associated negative values with the EU – such as unfairness, chaos and instability and moral decline – or explicitly stated that they do not believe in the EU and are afraid of losing sovereignty because of the European Union. The European Union is the most trusted foreign institution in Moldova (54%), followed by the Eurasian Economic Union (44%). The United Nations and NATO, on the other hand, are less trusted by a third and a quarter of citizens respectively (fig. 3). Compared to 2016, the share of those who trust the Eurasian Economic Union has recorded the highest increase (+10%), while all the other institutions have recorded a decrease – in particular, the EU has recorded a decrease of 5% since 2016.

<sup>7</sup> Respondents were asked to choose and rank the three most important personal values from a list of 13 items.

**FIGURE 3 – Trust towards different institutions (Q2.11)**



As already noted in regard to the perception of the EU, the level of trust in the European Union is highly linked to the citizens' mother tongue. Romanian speakers are in fact twice as likely to trust the Union as compared to Russian speakers (63% versus 29%), which accordingly are on average twice as likely to not trust it (61%) or have no opinion (10%). The level of trust also increases with the level of education and decreases according to age: 69% of highly-educated individuals tend to trust the EU, compared to 58% and 47% of Moldovans with medium and low levels of education; 61% of younger Moldovans tend to trust the EU, compared to 57% in the 34-55 age-bracket and 40% of those older than 55 (tab 3). The European Union is also particularly trusted by residents of the centre of the country (69%), employed people (60%) and females (59%).

**TABLE 3 – Trust towards the European Union**

<b>Q2.11. I would like to ask you a question about how much trust you have in the EU</b>					
		<b>Tend to trust</b>	<b>Tend not to trust</b>	<b>Don't know or never heard of the EU</b>	<b>Total</b>
<b>Settlement size</b>	Capital	58%	39%	3%	<b>100%</b>
	Between 20,000 and 150,000 inhabitants	45%	46%	9%	<b>100%</b>
	Less than 20,000 inhabitants	54%	41%	5%	<b>100%</b>
<b>Gender</b>	Male	48%	48%	4%	<b>100%</b>
	Female	59%	35%	6%	<b>100%</b>
<b>Age group</b>	15-34 years	61%	31%	8%	<b>100%</b>
	35-54 years	57%	41%	2%	<b>100%</b>
	55 years & above	40%	55%	5%	<b>100%</b>
<b>Education level</b>	Low level	47%	47%	6%	<b>100%</b>
	Medium level	58%	37%	5%	<b>100%</b>
	High level	69%	29%	2%	<b>100%</b>
<b>Employment status</b>	Employed	60%	36%	4%	<b>100%</b>
	Unemployed or temporarily not working / inactive	50%	45%	5%	<b>100%</b>
<b>Mother tongue</b>	Romanian	63%	32%	5%	<b>100%</b>
	Russian	29%	61%	10%	<b>100%</b>
<b>Geographical area</b>	Centre	69%	29%	2%	<b>100%</b>
	North	41%	49%	10%	<b>100%</b>
	South	44%	51%	5%	<b>100%</b>
<b>Total</b>		<b>54%</b>	<b>41%</b>	<b>5%</b>	<b>0%</b>

### 3.2.2. EU relations with Moldova and awareness of EU financial support

Nearly 70% of Moldovans describe their country’s relationship with the European Union as fairly or very good (fig. 4). Conversely, one in four individuals described it as fairly or very bad. The findings are in line with the previous wave. 7% of citizens did not know how to answer the question or believed that there were no relations between Moldova and the European Union.

**FIGURE 4 – In general, how would you describe the relations that the European Union has with your country? (Q2.4)**



Again, the opinion on relations between Moldova and the EU highly depends on the citizens’ mother tongue: three quarters of Romanian speakers perceive the relationship to be good, compared to 52% of Russian speakers, who accordingly tend to have a more negative opinion (40% versus 19%). Sex and education also seem to influence the perception of citizens, as females and highly educated people tend to be much more positive. Older people, unemployed and northern residents are particularly undecided (over 10% in each category answered “don’t know”), while residents of medium-sized cities are more negative.

**TABLE 4 – Relations between the EU and Moldova**

Q2.4. In general, how would you describe the relations that the European Union has with Moldova?		Good	Bad	Don't know/No relations	Total
Settlement size	Capital	74%	22%	4%	100%
	Between 20,000 and 150,000 inhabitants	64%	33%	4%	100%
	Less than 20,000 inhabitants	67%	24%	9%	100%
Gender	Male	61%	31%	8%	100%
	Female	74%	20%	6%	100%
Age group	15-34 years	68%	24%	8%	100%
	35-54 years	69%	26%	5%	100%
	55 years & above	66%	25%	10%	100%
Education level	Low level	64%	27%	9%	100%
	Medium level	70%	23%	7%	100%
	High level	77%	20%	3%	100%
Employment status	Employed	72%	24%	4%	100%
	Unemployed or temporarily not working / inactive	65%	25%	10%	100%
Mother tongue	Romanian	74%	19%	7%	100%
	Russian	52%	40%	8%	100%
Geographical area	Centre	79%	16%	5%	100%
	North	53%	34%	13%	100%
	South	66%	29%	5%	100%
<b>Total</b>		<b>68%</b>	<b>25%</b>	<b>7%</b>	<b>100%</b>

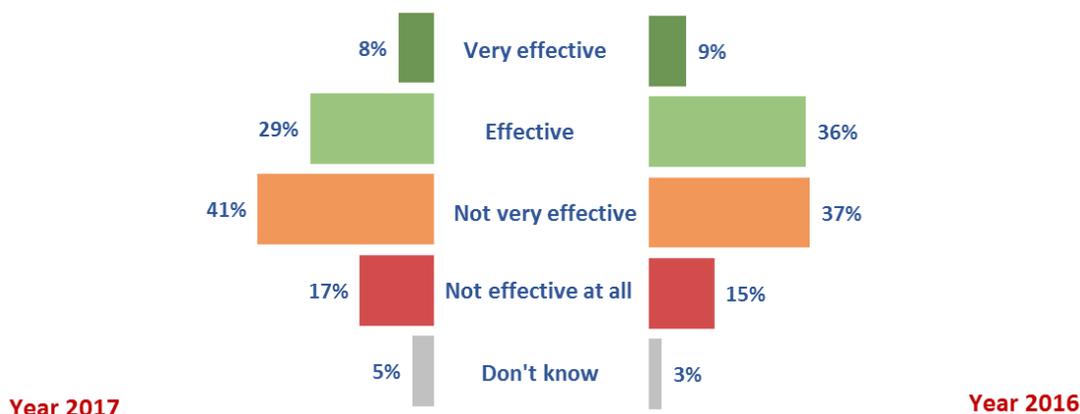
The proportion of citizens aware of the financial support provided by the EU has slightly decreased since 2016 (-4%). However, nearly 80% of Moldovans are aware of the EU's support to their country (tab. 5). Highly educated people (92%), residents of the centre of the country (91%) and of the capital (92%) and Romanian speakers (83%) are more likely to be aware of the EU's financial support to Moldova, thus mirroring the groups that are generally more pro-EU. While on average 11% of citizens have no knowledge about the EU's financial support (this figure was 10% last year), 22% of northern residents refrained from giving a definite answer on the issue.

**TABLE 5 – Provision of financial support by the EU**

Q2.5. As far as you know, does the European Union provide Moldova with financial support?		Yes	No	Don't know	Total
Settlement size	Capital	92%	3%	5%	100%
	Between 20,000 and 150,000 inhabitants	76%	16%	9%	100%
	Less than 20,000 inhabitants	76%	10%	14%	100%
Gender	Male	81%	9%	10%	100%
	Female	78%	10%	12%	100%
Age group	15-34 years	82%	7%	11%	100%
	35-54 years	79%	11%	10%	100%
	55 years & above	76%	12%	12%	100%
Education level	Low level	72%	13%	15%	100%
	Medium level	84%	7%	9%	100%
	High level	92%	6%	2%	100%
Employment status	Employed	83%	9%	8%	100%
	Unemployed or temporarily not working / inactive	77%	10%	13%	100%
Mother tongue	Romanian	83%	6%	11%	100%
	Russian	78%	9%	13%	100%
Geographical area	Centre	91%	4%	5%	100%
	North	61%	17%	22%	100%
	South	81%	10%	9%	100%
<b>Total</b>		<b>79%</b>	<b>10%</b>	<b>11%</b>	<b>100%</b>

As shown in the figure below (fig. 5), the share of people believing financial support to be effective or very effective has decreased quite significantly, from 45% to 37%, compared to 2016. 58% of individuals who are aware of the EU's financial support deem the support not to be effective (52% in 2016).

**FIGURE 5 – How effective do you think the EU's support has been? (Q2.5.1)**



Percentages refer to Moldovans who were aware of the EU's financial support

Specifically, the highest percentages of people who believe the financial support provided by the EU to have been effective are residents of the centre of the country (45%), 15-34 year olds (44%), Romanian speakers and females (both 41%) (tab. 6). Once again, these are the same socio-demographic groups that tend to have the most positive image of the EU, the highest levels of trust in the EU and the greatest awareness of the EU's support. Between 10% and 15% of northern residents and of older individuals did not rate the EU's support.

**TABLE 6 – Effectiveness of the support**

Q2.5.1. How effective do you think the support has been?		Effective	Not effective	Don't know	Total
Settlement size	Capital	34%	66%	0%	100%
	Between 20,000 and 150,000 inhabitants	39%	53%	8%	100%
	Less than 20,000 inhabitants	38%	56%	6%	100%
Gender	Male	33%	64%	3%	100%
	Female	41%	52%	7%	100%
Age group	15-34 years	44%	52%	4%	100%
	35-54 years	39%	59%	2%	100%
	55 years & above	24%	65%	11%	100%
Education level	Low level	39%	53%	8%	100%
	Medium level	34%	62%	4%	100%
	High level	39%	61%	0%	100%
Employment status	Employed	38%	61%	1%	100%
	Unemployed or temporarily not working / inactive	36%	56%	8%	100%
Mother tongue	Romanian	41%	54%	5%	100%
	Russian	19%	81%	0%	100%
Geographical area	Centre	45%	54%	1%	100%
	North	32%	53%	15%	100%
	South	27%	69%	4%	100%
<b>Total</b>		<b>37%</b>	<b>58%</b>	<b>5%</b>	<b>100%</b>

Percentages refer to Moldovans who were aware of the EU's financial support

Awareness of specific programmes financed by the EU is quite high in Moldova: over half of citizens know about EU-financed programmes. Education and employment status appear to be closely linked to this kind of information (tab. 7). Nearly 80% of highly educated individuals are aware of specific programmes, as well as 65% of employed individuals. Individuals aged between 35 and 54 years, Romanian speakers and southern residents all display a higher level of knowledge than the other socio-demographic groups. Interestingly, residents of northern and medium-sized cities tend to be the most unaware of programmes financed by the EU.

**TABLE 7 – Programmes financed by the EU**

<b>Q2.6. Do you know of any specific programmes financed by the European Union in Moldova?</b>				
		<b>Yes</b>	<b>No</b>	<b>Total</b>
<b>Settlement size</b>	Capital	51%	49%	<b>100%</b>
	Between 20,000 and 150,000 inhabitants	35%	65%	<b>100%</b>
	Less than 20,000 inhabitants	56%	44%	<b>100%</b>
<b>Gender</b>	Male	54%	46%	<b>100%</b>
	Female	51%	49%	<b>100%</b>
<b>Age group</b>	15-34 years	47%	53%	<b>100%</b>
	35-54 years	60%	40%	<b>100%</b>
	55 years & above	50%	50%	<b>100%</b>
<b>Education level</b>	Low level	45%	55%	<b>100%</b>
	Medium level	52%	48%	<b>100%</b>
	High level	79%	21%	<b>100%</b>
<b>Employment status</b>	Employed	65%	35%	<b>100%</b>
	Unemployed or temporarily not working / inactive	43%	57%	<b>100%</b>
<b>Mother tongue</b>	Romanian	56%	44%	<b>100%</b>
	Russian	42%	58%	<b>100%</b>
<b>Geographical area</b>	Centre	51%	49%	<b>100%</b>
	North	37%	63%	<b>100%</b>
	South	67%	33%	<b>100%</b>
<b>Total</b>		<b>52%</b>	<b>48%</b>	<b>100%</b>

*Percentages refer to Moldovans who were aware of the EU's financial support*

When asked about the specific EU-financed programmes they know, the vast majority (65%) recalled infrastructure development projects. Educational programmes, followed by agricultural and rural development programmes and health and medicine programmes, were mentioned by between a quarter and a third of citizens who were aware of the EU's financial support (fig. 6). Programmes in the fields of culture, justice and policy and energy efficiency are the least frequently known, although it should be highlighted that all citizens aware of the EU's financial support recalled at least one specific EU-supported programme area. One in ten Moldovans have personally been (or know someone) involved in an EU-funded project in the past twelve months.

**FIGURE 6 – Which specific programme(s) do you know? (Q2.6.1, multiple answers possible)**

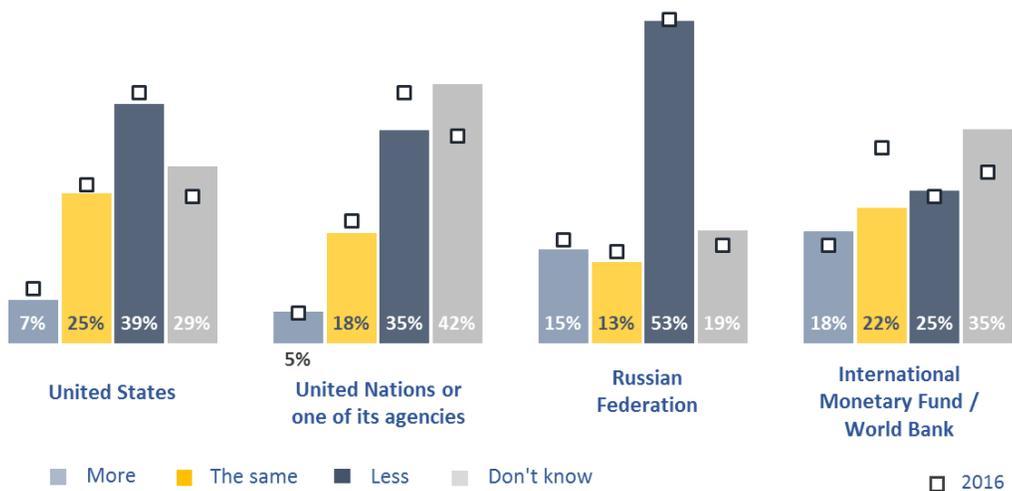


*Percentages refer to Moldovans who were aware of the EU's financial support*

Citizens were also asked to compare the support provided by different organisations – such as the International Monetary Fund (IMF)/World Bank (WB), the United States of America, the United Nations and its agencies, and the Russian Federation – with that provided by the European Union (fig. 7). Just like in 2016, only a very low proportion of Moldovans believed that the support provided by the other countries/organisations exceeded that provided by the EU (7% indicated the US, 5% the UN, 18% the IMF/WB and 15% the Russian Federation).

However, it is important to note that between 19% and 42% of the population said that it did not have enough information to answer the question. Citizens were mostly incapable of comparing the support provided by the UN with that provided by the EU, while the UN is the least known donor for the second year in a row.

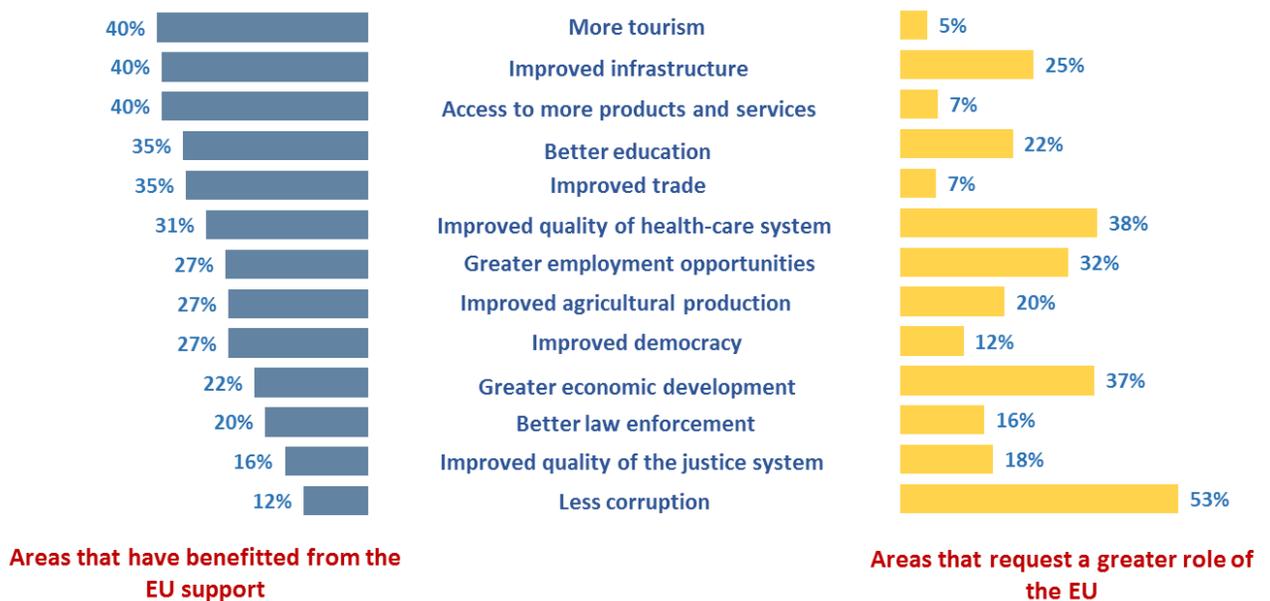
**FIGURE 7 – As far as you know, for each of the following international institutions, would you say that it provides more, the same, or less financial support to your country than the European Union? (Q2.7)**



When assessing the benefits stemming from the EU’s support, Moldovans mainly cited tourism, infrastructure, access to products/services, trade, education and the health-care system: between 30 and 40% believe these areas have benefitted very much or fairly (fig. 7). However, they appeared more reserved and less enthusiastic than last year. Only education scored a very positive appreciation rate (above 5%) although all the above-mentioned areas did last year, while fair benefits were also acknowledged by lower shares of the population (tab. A1 in Annex).

While corruption is the least supported area by the EU – in line with the finding that sees corruption as the least associated value with the EU – half of Moldovans believe the EU should play a greater role in reducing corruption (fig. 8).<sup>8</sup> 30-40% of Moldovans also believe that the EU should play a greater role in improving the healthcare system and supporting economic development and employment opportunities. Infrastructure, education and agricultural production are also priority areas for EU support for around one fifth of Moldovan citizens.

**FIGURE 8 – Areas that have benefitted very much or fairly from EU support (Q2.8) & three most important areas that require greater support by the EU (Q2.9)**



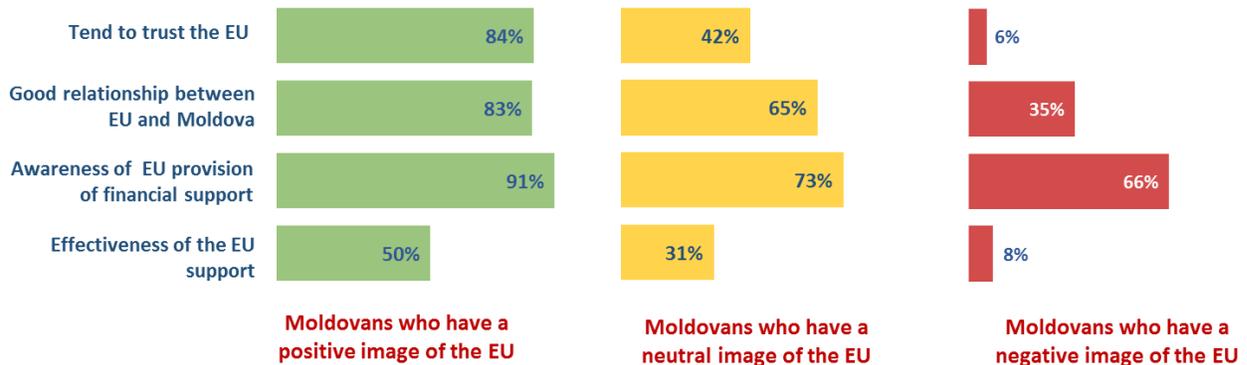
<sup>8</sup> Respondents were asked to name and rank the three most important areas in which the EU should play a greater role. See Appendix Table A2 for more details.

### 3.2.3. Attitudes towards the EU: a snapshot

In this section, the attitude of Moldovans towards the EU has been analysed according to three main profiles: individuals that have a positive image of the EU, those who are mostly neutral and those who have a negative image of the EU. Four indicators were considered: level of trust in the EU, relationship between Moldova and the EU, awareness of the EU’s financial support, opinion on the effectiveness of EU support.

The first thing that should be noted is that, unsurprisingly, individuals that have a positive image of the EU are also more likely to be more positively oriented for all four indicators compared to those who mostly have a neutral or negative stance (fig. 9)<sup>9</sup>. In particular, more than 80% of those who have a positive attitude also tend to trust the EU, compared to around a third of those who are mostly neutral (42%) and 6% of those who have a negative image. Individuals that have a positive image of the EU are also more likely to acknowledge the value of the relations between the EU and their country, as well as the impact of its support. The awareness of the financial support of the EU appears to be the indicator most loosely connected to the type of profile, in the sense that the image that the individuals have of the EU seems to affect their awareness of its support to a much lesser extent.

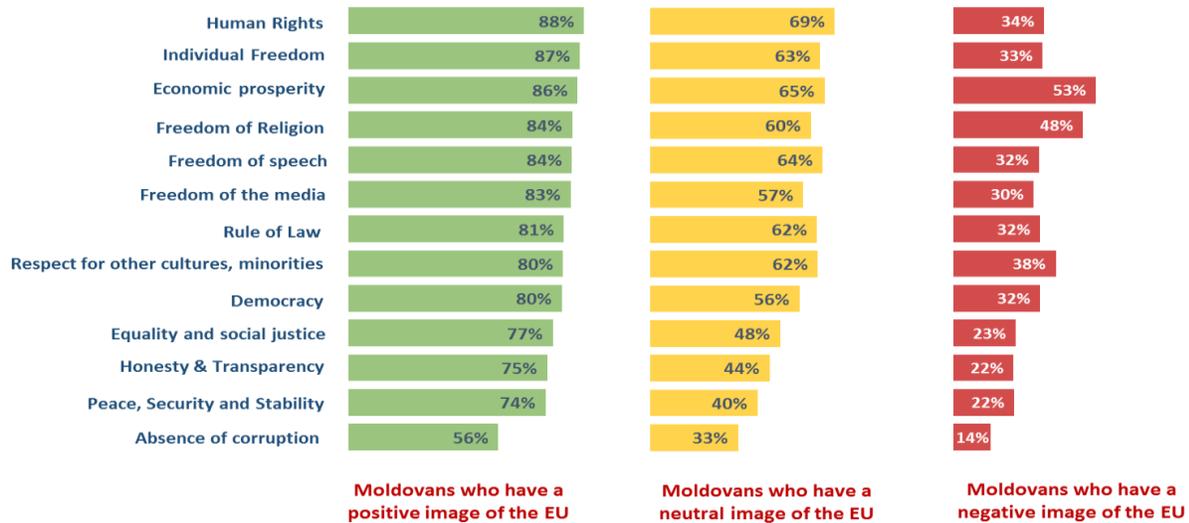
**FIGURE 9 – Attitudes towards the EU: positive versus neutral and negative**



The top three values with which Moldovans with a positive image of the EU tend to strongly and very strongly associate with the Union are human rights, individual freedom and economic prosperity (fig. 10). Neutrally oriented citizens also tend to associate the EU with these values – and also with freedom of speech – while those with a negative image mostly refer to economic prosperity, freedom of religion and respect for other cultures. This finding may be linked to the fact that minorities, such as the Russian mother tongue community, which on average tends to have a more negative image of the EU, may be more concerned about the respect of their specific cultures. Economic prosperity, on the other hand, is a more shared value, regardless of ethno-religious-linguistic affiliation. Conversely, the least associated values – such as absence of corruption, peace, security and stability and honesty and transparency – are the same for all three populations.

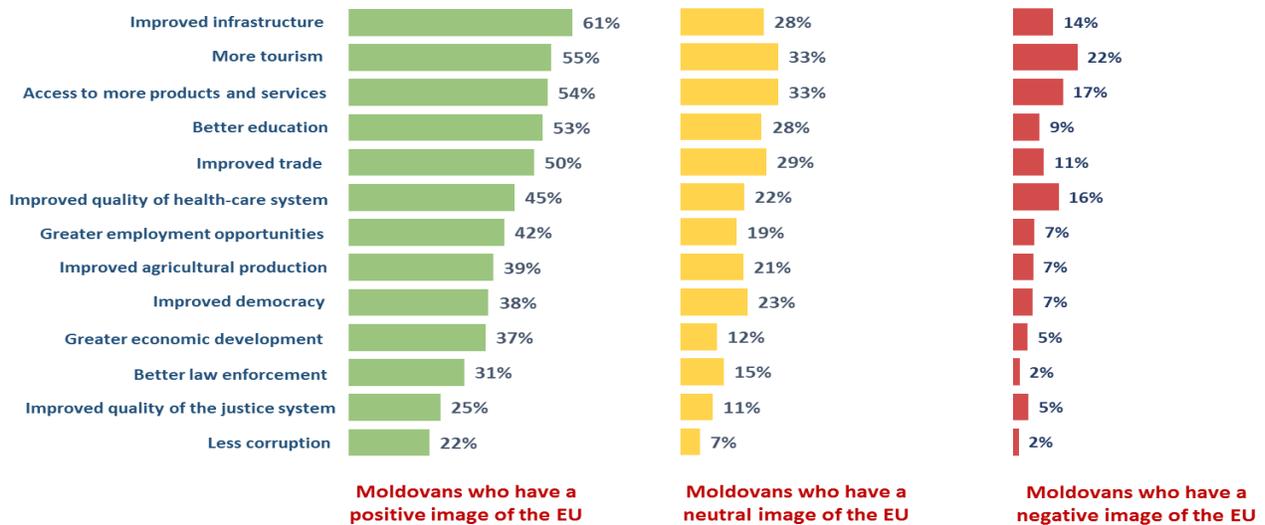
<sup>9</sup> More details are provided in Annex, Table A3.

**FIGURE 10 – Values strongly associated with the EU – positive versus neutral and negative**



As expected, those with positive attitudes towards the EU see more benefits for Moldova coming from the EU than neutrally and negatively oriented individuals. As shown in figure 11, significant shares of individuals belonging to all three profiles believe that the European Union has very much/fairly encouraged tourism and access to more products/services (over half of those with a positive image, around a third of those with a neutral image and around a fifth of those with a negative image respectively). Infrastructure, trade, education and health-care systems also seem to have strongly benefitted from the EU –particularly according to citizens with a positive image of the Union. Corruption, law enforcement and the quality of the justice system were the least mentioned benefits by all three populations, and negatively oriented individuals were most critical in these areas: only 2% mentioned the first two areas and 5% mentioned the quality of the justice system.

**FIGURE 11 – Areas that have very much or fairly benefitted from EU support: positive versus neutral and negative**



### 3.3. Sources of information on the EU

#### 3.3.1. Media usage as sources of information

Television is the most popular media channel in Moldova – 45% of Moldovans always watch television, 32% often and 16% sometimes (fig. 12). The second most commonly used source of information is word of mouth (from neighbours, friends, colleagues, etc.) – as stated by 80% of the population. However, although most of the individuals tend to use it often and sometimes, only 12% always rely on it. Internet and social media (used by 69% and 50% respectively) are also quite popular among the population –one in four Moldovans always rely on the internet as a primary source of information. Radio and print media are used by 55% and 46% of the population respectively, while the official EU website is rarely used (80% never use it).

**FIGURE 12 – Type of media used as a source of information (Q3.7)**



Overall, nearly 6 out of 10 Moldovans are regularly active on the internet or social media, over 1 in 3 frequently use only traditional media and individuals that do not frequently use any of the above-mentioned media account for only 5% of the population<sup>10</sup> (tab. 8).

The use of media is linked to education. While citizens with a low level of education are more likely to use traditional media, those with medium and, in particular, high levels of education tend to rely on the internet and social media. Age is also quite important in the choice of preferred media: individuals aged less than 55 are more frequent internet and social media users, while older generations are more than twice as likely to rely solely on traditional media. On average, residents of the capital and centre of the country, the employed and males tend to rely on the internet and social media, as opposed to northern residents, females and unemployed/temporarily inactive citizens, who tend to prefer traditional media. As for word of mouth, apparently middle-aged individuals, the employed and those living in the capital are more prone to relying on this source of information than other socio-demographic groups.

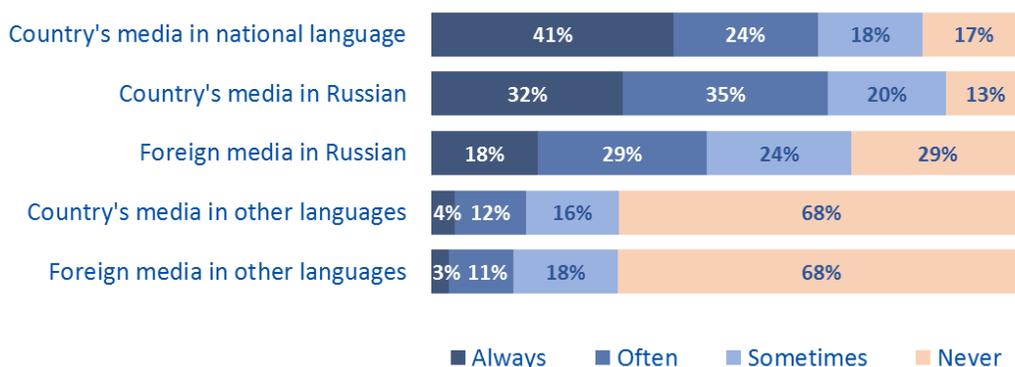
<sup>10</sup> The first group includes all individuals that always or often use either internet (including the official EU web site) or the social media; the second group includes all individuals that “always or often” use only traditional media (such as television, radio and print media); while the last group includes all individuals that do not “always or often” use any of the surveyed media.

**TABLE 8 – Type of media frequently used as source of information**

		Type of media frequently used as source of information (Q3.8)				Word of mouth used as source of information (Q3.8)
		No media	Only traditional media	Social media or internet	Total	
<b>Settlement size</b>	Capital	4%	25%	71%	100%	56%
	Between 20,000 and 150,000 inhabitants	3%	44%	54%	100%	52%
	Less than 20,000 inhabitants	5%	42%	53%	100%	47%
<b>Gender</b>	Male	5%	34%	61%	100%	48%
	Female	5%	43%	52%	100%	51%
<b>Age group</b>	15-34 years	5%	13%	82%	100%	45%
	35-54 years	5%	36%	59%	100%	61%
	55 years & above	4%	80%	16%	100%	43%
<b>Education level</b>	Low level	4%	50%	46%	100%	47%
	Medium level	6%	32%	62%	100%	53%
	High level	1%	18%	81%	100%	45%
<b>Employment status</b>	Employed	3%	32%	65%	100%	63%
	Unemployed or temporarily not working / inactive	6%	44%	50%	100%	40%
<b>Mother tongue</b>	Romanian	5%	37%	58%	100%	48%
	Russian	8%	35%	57%	100%	44%
<b>Geographical area</b>	Centre	6%	31%	63%	100%	52%
	North	4%	51%	45%	100%	41%
	South	4%	39%	57%	100%	55%
<b>Total</b>		<b>5%</b>	<b>39%</b>	<b>56%</b>	<b>100%</b>	<b>50%</b>

Four out of five Moldovans (41% always, 24% often and 19% sometimes) rely on media in national language (fig. 13). Usage of the country’s media in Russian is even more common: almost 70% use such media sources always or often and nearly 20% sometimes. Usage of foreign media in Russian is also quite common – only 29% of citizens never use such media. Foreign – and national – media in other languages are far less popular: nearly 70% never use them and less than 5% always rely on them as a preferred source of information, while just over a quarter use them sometimes or often.

**FIGURE 13 – Usage of media in national language, Russian and other languages (Q3.7)**



In the below table, the socio-demographic characteristics of the population have been analysed according to three main profiles – individuals that frequently use media in their national language (65%), individuals that frequently use media only in Russian (70%) and those who often rely on media in other languages (21%).<sup>11</sup>

Apparently, Romanian native speakers are more than three times as likely to frequently use media in their national language. Highly educated individuals are also more prone to use media in Romanian (81%). Similarly, Russian native speakers tend to use media in Russian more frequently – and this also holds true for older individuals and those living in the north or south of the country. Highly educated individuals, younger generations and residents of the centre of the country are more likely to be frequent consumers of media in other languages.

**TABLE 9 – Frequent usage of media in national language, Russian and other languages**

		Individuals that always or often use media (Q3.8)		
		In national language	In Russian	In other foreign language
<b>Settlement size</b>	Equal to or more than 150,000 inhabitants	68%	66%	38%
	Between 20,000 and 150,000 inhabitants	63%	70%	18%
	Less than 20,000 inhabitants	65%	72%	17%
<b>Gender</b>	Male	61%	68%	24%
	Female	69%	73%	19%
<b>Age group</b>	15-34 years	61%	62%	26%
	35-54 years	71%	71%	17%
	55 years & above	65%	81%	19%
<b>Education level</b>	Low level	65%	70%	17%
	Medium level	62%	71%	23%
	High level	81%	70%	32%
<b>Employment status</b>	Employed	70%	65%	17%
	Unemployed or temporarily not working / inactive	62%	74%	24%
<b>Mother tongue</b>	Romanian	77%	65%	22%
	Russian	25%	86%	24%
<b>Geographical area</b>	Centre	69%	62%	32%
	North	67%	77%	12%
	South	58%	77%	14%
<b>Total</b>		<b>65%</b>	<b>70%</b>	<b>21%</b>

Trust levels towards different media sources are similar to the usage patterns of media: most people tend to trust the country’s media in Romanian (59%) and in Russian (49%). Foreign media in Russian is also trusted by over one in three citizens, while the country’s media in foreign languages and foreign media record the lowest levels of trust (15% and 16% respectively). As for media sources, television is the most trusted source of information in Moldova (60%), followed shortly by the internet and word of mouth (47% and 43% respectively). One in three Moldovans trust the radio and one in four trust print media and social networks. Again, the official EU website recorded the lowest level of trust (19%), although it should be noted that almost half of individuals did not know how to rate it, a finding that is possibly linked to their lack of use and awareness of such a source of information<sup>12</sup>.

<sup>11</sup> The first group includes all individuals who “always” or “often” use media in Moldovan; the second group includes all individuals who always or often use national or foreign media in Russian; while the last group includes all individuals who always or often use national or foreign media in other languages. The frequent use of media in one language is not exclusive, in the sense that individuals might also access media in other languages.

<sup>12</sup> More details are provided in Annex, Table A4.

### 3.3.2. Sources of information about the EU

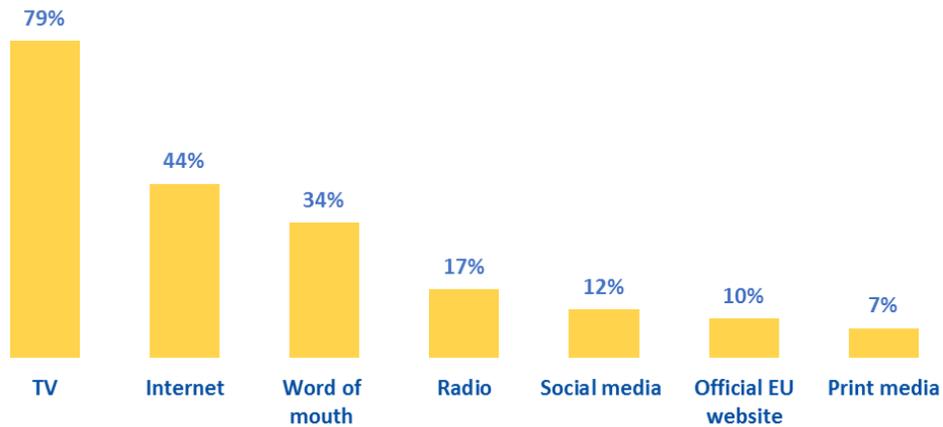
67% of Moldovans claimed to have heard about the European Union in the last three months as compared to 80% in 2016. Highly educated individuals, those in the working age bracket (15-55 years) and residents of the capital and centre of the country were more likely to have recently been exposed to information about the EU, as compared to other socio-demographic groups. In particular, nearly 90% of highly educated individuals had seen or heard information about the EU in the last three months, compared to 69% of individuals with a medium level of education and 60% of those with a low level of education (tab. 10). In addition, social media and internet frequent users and individuals frequently accessing media in Romanian and in foreign languages other than Russian are also more likely to have been exposed to information about the EU (see Annex, Table A5).

**TABLE 10 – Exposure to information about the EU**

<b>Q3.2. Have you seen or heard any information about the EU in the last three months?</b>				
		<b>Yes</b>	<b>No</b>	<b>Total</b>
<b>Settlement size</b>	Capital	74%	26%	<b>100%</b>
	Between 20,000 and 150,000 inhabitants	66%	34%	<b>100%</b>
	Less than 20,000 inhabitants	65%	35%	<b>100%</b>
<b>Gender</b>	Male	67%	33%	<b>100%</b>
	Female	67%	33%	<b>100%</b>
<b>Age group</b>	15-34 years	67%	33%	<b>100%</b>
	35-54 years	72%	28%	<b>100%</b>
	55 years & above	61%	39%	<b>100%</b>
<b>Education level</b>	Low level	60%	40%	<b>100%</b>
	Medium level	69%	31%	<b>100%</b>
	High level	89%	11%	<b>100%</b>
<b>Employment status</b>	Employed	71%	29%	<b>100%</b>
	Unemployed or temporarily not working / inactive	65%	35%	<b>100%</b>
<b>Mother tongue</b>	Romanian	72%	28%	<b>100%</b>
	Russian	67%	33%	<b>100%</b>
<b>Geographical area</b>	Centre	76%	24%	<b>100%</b>
	North	54%	46%	<b>100%</b>
	South	68%	32%	<b>100%</b>
<b>Total</b>		<b>67%</b>	<b>33%</b>	<b>100%</b>

Most of the information recently obtained by people came from television (79%). Nearly one out of two Moldovan heard or saw information about the EU through the internet (44%), around one third through word of mouth (34%) and 17% from the radio. Social media, the official EU website and printed press accounted respectively for 12%, 10% and 7% of the overall population.

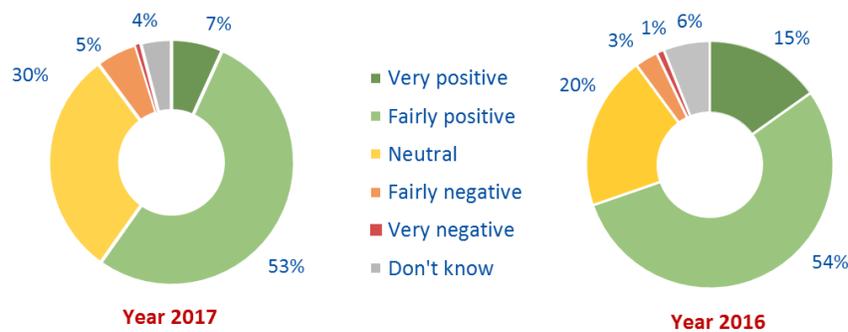
**FIGURE 14 – Where or from whom you have you seen or heard information about the EU in the last three months? (Q3.2.1, multiple answers possible)**



*Percentages refer to Moldovans who have heard any information about the EU in the last three months*

When asked to evaluate the image of the EU in the national media, most of the population felt that the national media represented the European Union very positively (7%) or fairly positively (53%). However their evaluation is less positive than in 2016, when 15% of Moldovans judged it very positive and 54% fairly positive. Therefore, it appears that there has been a shift from a positive opinion to a more neutral one (fig. 15). Taking a closer look at the three main profiles of media users, again internet and social media users as well as individuals frequently accessing media in Romanian and in foreign languages other than Russian tend to have the more positive view (Annex, Table A5).

**FIGURE 15 – In general, how would you say the EU was presented in the national media? (Q3.3)**



Accordingly, highly educated individuals, in the working age bracket (15-54 years), are more likely to judge the image of the EU in the national media as positive. Romanian mother tongue, residents of the capital and centre of the country, also share positive views, while Russian mother tongue and medium-sized cities residents are more neutral. Moldovans living in the South are those with the more negative view (tab. 11).

**TABLE 11 – Representation of the EU in the national media**

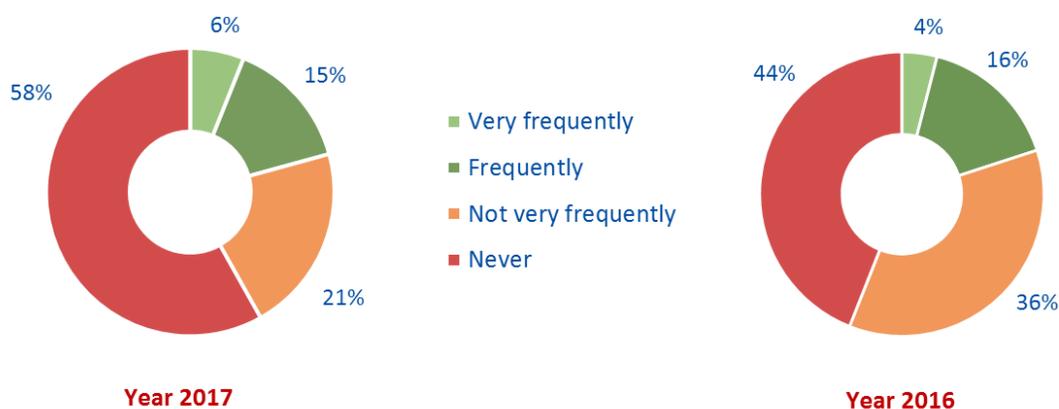
Q3.3. In general how would you say the EU was presented in the national media?		Positive	Neutral	Negative	Don't know	Total
<b>Settlement size</b>	Capital	65%	22%	9%	4%	100%
	Between 20,000 and 150,000 inhabitants	49%	41%	3%	7%	100%
	Less than 20,000 inhabitants	60%	30%	6%	4%	100%
<b>Gender</b>	Male	56%	32%	7%	5%	100%
	Female	62%	27%	5%	6%	100%
<b>Age group</b>	15-34 years	63%	26%	7%	4%	100%
	35-54 years	60%	34%	5%	1%	100%
	55 years & above	53%	31%	7%	9%	100%
<b>Education level</b>	Low level	60%	29%	6%	5%	100%
	Medium level	56%	33%	7%	4%	100%
	High level	73%	22%	4%	1%	100%
<b>Employment status</b>	Employed	65%	25%	6%	4%	100%
	Unemployed or temporarily not working / inactive	55%	33%	6%	6%	100%
<b>Mother tongue</b>	Romanian	66%	26%	5%	3%	100%
	Russian	40%	43%	8%	9%	100%
<b>Geographical area</b>	Centre	68%	25%	6%	1%	100%
	North	59%	30%	2%	9%	100%
	South	47%	37%	11%	5%	100%
<b>Total</b>		<b>60%</b>	<b>30%</b>	<b>6%</b>	<b>4%</b>	<b>100%</b>

When asked about the influence on their own perception, half of the population (54%) stated that the information they read, watch or access online helps them to have a better understanding of the European Union. However nearly 40% of Moldovans rated it as ‘not helpful’ – and the rest (7%) just did not have an opinion. Internet and social media users are more than twice as likely to rate the information useful (73%) than individuals frequently relying only on traditional media (27%). Nearly half of Russian media users, on the other hand, are convinced that the information they access does not help them to better understand the EU as compared to 35% of those frequently accessing media in national language and 31% of those relying on media in other languages.

The following section looks specifically at sources of information about the EU, therefore it only refers to Moldovans who actively look for/access information on the EU.

Information on the European Union is accessed frequently or very frequently only by a fifth of the population (21%) in line with 2016 findings (fig. 16). However compared to 2016, the share of those accessing such information not very frequently has considerably decreased, from one out of three to one out five Moldovans. In fact, most of the population (58%) never access information on the European Union (it was 44% in 2016). Again internet and social media users, and individuals frequently relying on media in other languages are much more likely to actively search for information on the EU than other profiles.

**FIGURE 16 – How often do you look for/access information on the EU? (Q3.1)**



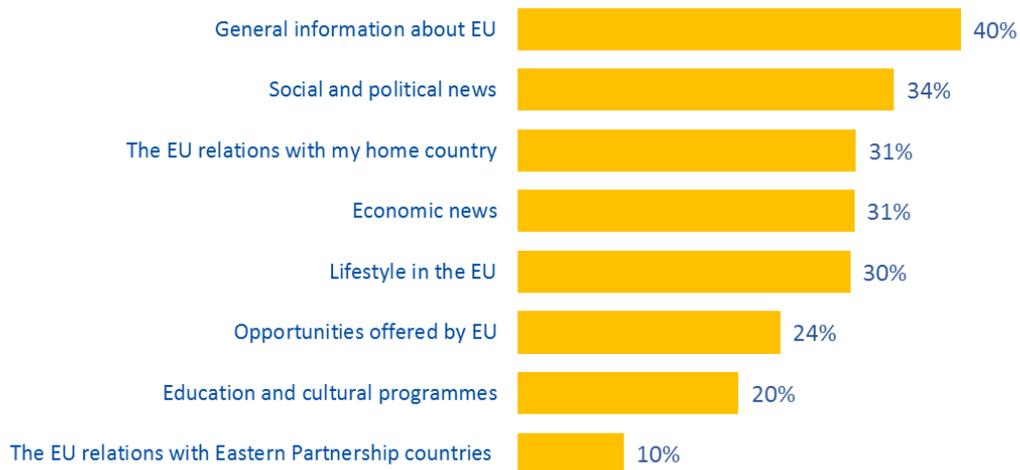
The highest share of people who never look for information on the EU can be found among older individuals, those with a low level of educations, Russian mother tongue and residents of the North: around 70% never looks for/access information on the Union. Frequent and occasional searchers are more likely to be found among highly educated individuals (72%), younger generations (52%) and Romanian mother tongue (48%).

**TABLE 12 – Accessing information about the EU**

Q3.1. How often do you look for/access information on the EU?		Frequently	Not very frequently	Never	Total
<b>Settlement size</b>	Capital	28%	15%	57%	100%
	Between 20,000 and 150,000 inhabitants	17%	21%	62%	100%
	Less than 20,000 inhabitants	19%	23%	58%	100%
<b>Gender</b>	Male	21%	22%	57%	100%
	Female	21%	20%	59%	100%
<b>Age group</b>	15-34 years	24%	28%	48%	100%
	35-54 years	19%	21%	60%	100%
	55 years & above	18%	12%	70%	100%
<b>Education level</b>	Low level	14%	19%	67%	100%
	Medium level	22%	22%	56%	100%
	High level	46%	26%	28%	100%
<b>Employment status</b>	Employed	21%	20%	59%	100%
	Unemployed or temporarily not working / inactive	21%	22%	57%	100%
<b>Mother tongue</b>	Romanian	25%	23%	52%	100%
	Russian	9%	23%	68%	100%
<b>Geographical area</b>	Centre	28%	19%	53%	100%
	North	7%	26%	67%	100%
	South	24%	20%	56%	100%
<b>Total</b>		<b>21%</b>	<b>21%</b>	<b>58%</b>	<b>100%</b>

Over half of the people who search for information about the EU access information in their national language (69%), around one fourth use Russian (24%) and 7% English. The most commonly searched topic are general information about the EU (40%), followed by social and political news (34%), and relations between the EU and their home country (31%) (fig. 17). Nearly one third of active searchers also look up for information on lifestyle in in EU Member States and economic news. The least mentioned topic is the EU relations with Eastern Partnership countries, looked up by every tenth Moldovan searching for information about the EU.

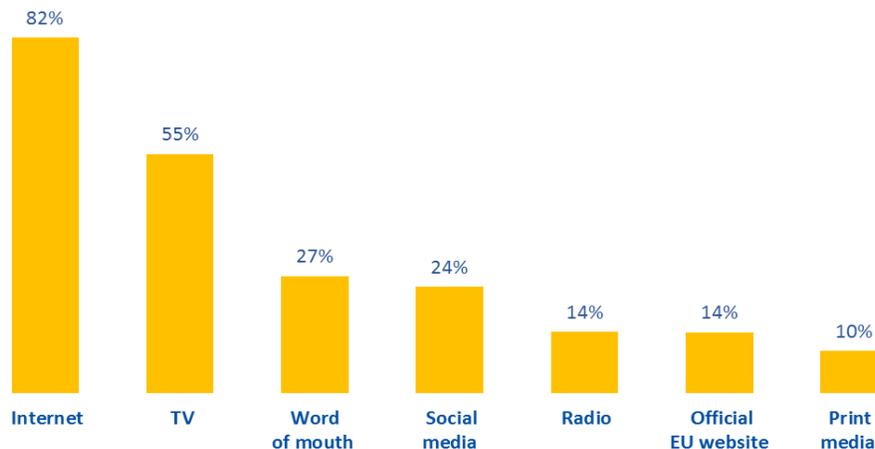
**FIGURE 17 – What type of information do you normally look for? (Q3.1.2, multiple answers possible)**



*Percentages refer to Moldovans who have looked for/accessed information on the EU*

While passive exposure to information about the EU mostly stems from television (79%) and to a lesser extent from the internet (44%), these shares seem reversed for those actively searching/accessing information, as most rely on internet (82%) and half on television channels (55%). One out of four active searchers also tend to rely on social media as much as on word of mouth, while radio, the official EU website and print press are on average less used (between 10% and 14% each) (fig. 18).

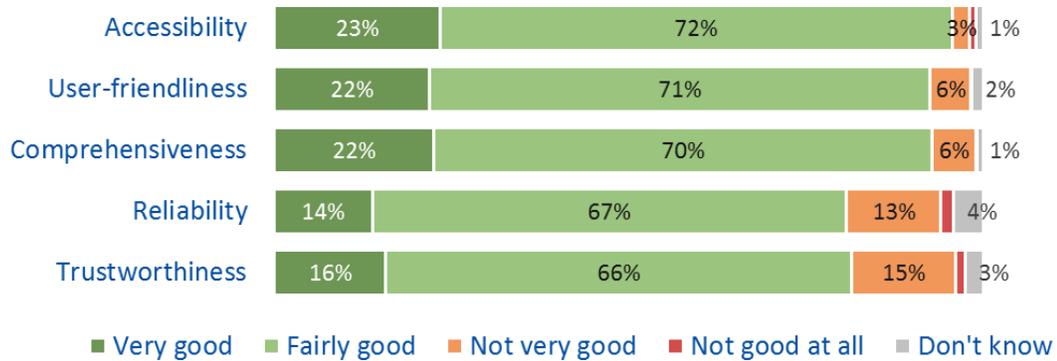
**FIGURE 18 – Where do you go to find information about the EU? (Q3.1.4, multiple answers possible)**



*Percentages refer to Moldovans who have looked for/accessed information on the EU*

Moldovans who search for EU-related information were also asked to assess certain characteristics of the information they found. Nearly all rated the information as being accessible (very – 23%; fairly – 72%); user-friendly (very – 22%; fairly – 71%) and comprehensive (very – 22%; fairly – 70%) (fig. 19). Around 80% of citizens also think of the information as very or fairly reliable and trustworthy. Between 4% and 16% of active users were not satisfied with the information they accessed for all five categories.

**FIGURE 19 – How would you rate the information in terms of...? (Q3.1.5)**



*Percentages refer to Moldovans who have looked for/accessed information on the EU*

Finally, one out of five Moldovans have used EU informational websites<sup>13</sup> at least once. The Facebook profile of the European Union is the most visited EU website (15% of the population). EU institutions' websites and EU Projects' websites are each visited by one out of ten Moldovans. The rest of the EU pages are only seen by 3%-6% of the target audience.

### 3.3.3. Sources of information and attitude towards the EU

As in section 3.3.1, the attitudes of Moldovans towards the EU have been analysed according to two main profiles – individuals that frequently use only traditional media and those who are regularly active on internet and social media. Individuals using word of mouth as a source of information have been assessed separately and figures for them are presented in Annex, Table A.6.

Moldovans who are frequent social media and internet users are on average more aware and positive about the relations between the EU and their country: 88% are aware of the EU's financial support; over 70% consider the relationship between their country and the EU to be good. Most of them – although smaller shares – also tend to trust the Union (62%) and view it quite positively (54%). The most controversial issue for them appears to be the effectiveness of the EU support, as for every two citizens that are satisfied there are three who are not<sup>14</sup>.

Traditional media users, on the other hand, are slightly less likely be aware of UE's financial support than social media and internet users (15% are not aware and 16% did not answer the question) and overall quite likely to consider the UE-Moldova relationship to be good (60%).

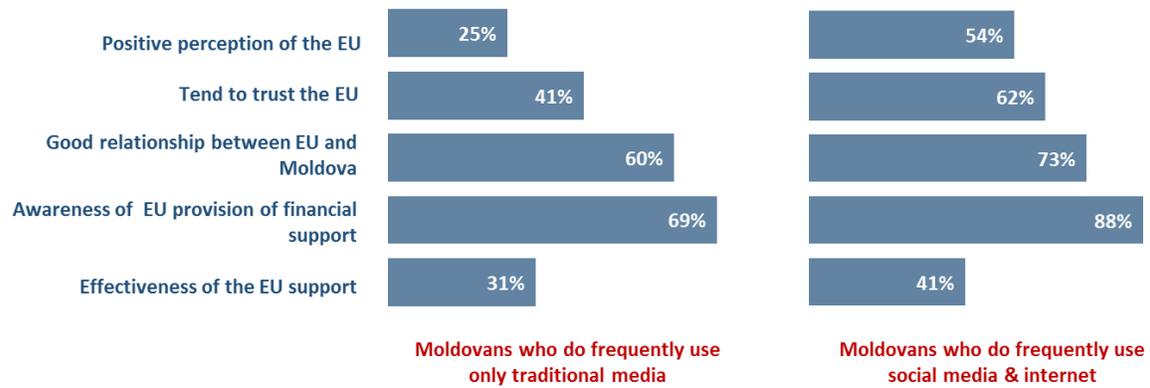
Only 41% tend to trust the Union and only one out of four has a positive image of the EU.

As for the effectiveness of the EU's financial support, 69% of traditional media users were not satisfied with it or did not have a definite opinion on the matter.

<sup>13</sup> EU institutions' websites; EU Delegation website; EU projects' website; EU Neighbourhood Info Centre portal; EU Twitter; EU Facebook.

<sup>14</sup> More details are provided in Annex, Table A6.

**FIGURE 20 – Type of media frequently used as a source of information and attitude towards the EU**



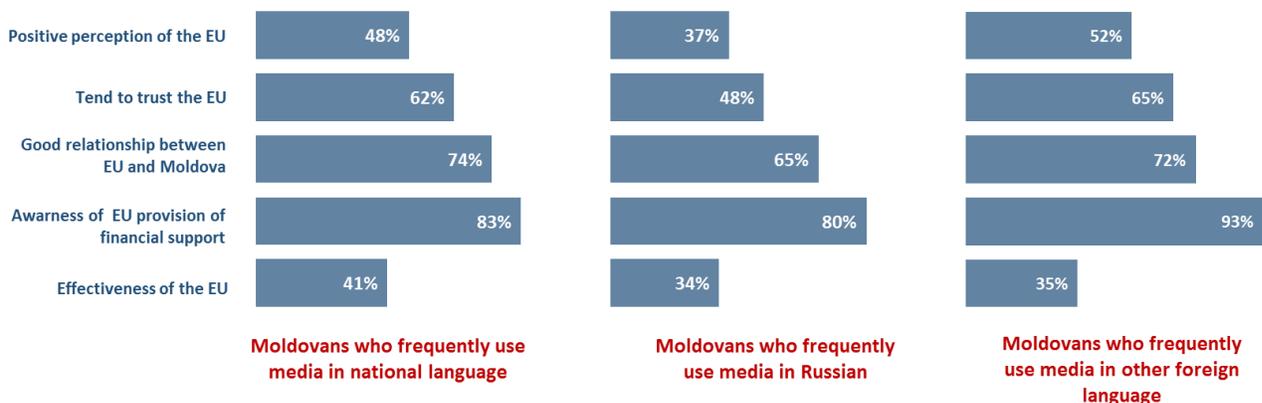
Attitudes towards the EU have also been assessed by comparing the people that frequently use media in their national language, with those who frequently rely on media in Russian or in other languages (fig. 21).<sup>15</sup> Most people (percentages varying between 65% and 93%), regardless of the language in which they frequently access media, tend to be aware of the EU’s financial support and rate as good the relation between their country and the EU. Russian media users are on average slightly less positive than other individuals, but still the vast majority share a positive view.

Trust appears to be more controversial in respect to language: most Romanian media users, as well as foreign media users, tend to trust the EU (62% and 65% respectively), while Russian media users tend to be more sceptical (48%).

The perception of the EU also tends to vary according to the three main profiles: users of media in national and foreign languages (other than Russian) are almost all neutral or positive (nearly 90%); while Russian media users have a slightly higher share of negative thinkers (22%). The effectiveness of UE’s support was the issue on which citizens were more critical – irrespective of the language of the media they frequently access.

Between 60% and 65% of citizens in all three profiles rated the EU’s support as ineffective. Users of media in national language were slightly more positive than other profiles.

**FIGURE 21 – Frequent usage of media in local language, Russian and other foreign language and attitude towards the EU**



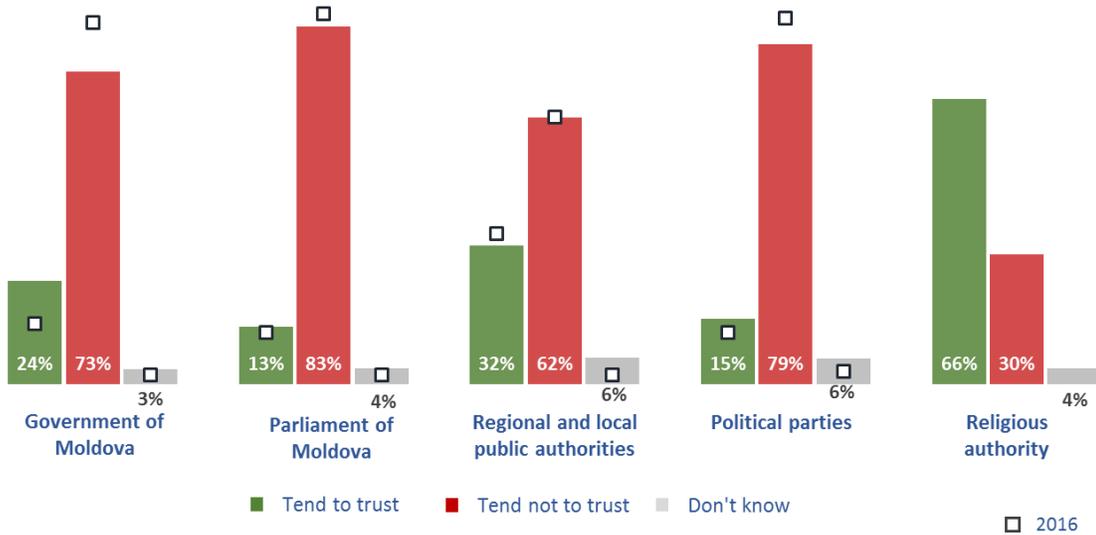
<sup>15</sup> As already noted, the frequent use of media in one language is not exclusive, as to say that individuals frequently accessing media in one language can also access media in other languages. More details are provided in Annex, Table A7.

### 3.4. View of Moldova’s current situation and future expectations

#### 3.4.1. View of Moldova’s current situation

Just like in 2016, Moldovans do not share a great deal of trust in national, regional and local institutions, nor in political parties. However, the share of individuals that tend to trust the Government has increased compared to last year from 14% to 24% (fig. 22). Political parties and the Parliament score the lowest levels of trust (15% and 13% respectively) for the second year in a row. The most interesting finding relates to the new variable that was included in 2017: Religious authority. In fact, this appears to be the most trusted institution in Moldova (66%).

**FIGURE 22 – Please tell us your level of trust for the following institutions (Q4.1)**



Dissatisfaction towards the political situation in their country becomes even more evident when citizens are asked to rate the current functioning of democracy: 83% of Moldovans are not satisfied with it (it was 87% in 2016). While the proportion of those who are fairly dissatisfied has remained stable, there has been a slight shift from those who showed strong discontent to those who do not have an opinion (fig. 23). No one believes democracy to be at its best in their homeland.

**FIGURE 23 – On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy works in Moldova? (Q4.3)**



The most dissatisfied of all socio-demographic groups appear to be highly educated individuals and residents of the Capital (both nearly 90%). Older individuals and northern residents tend to be slightly more undecided than other groups, while Russian mother tongue, medium sized cities – and Centre – residents and individuals in the working age bracket are faintly more likely to be satisfied with the way democracy works in Moldova (around 15% each) (tab. 13).

**TABLE 13 – Satisfaction with democracy in Moldova**

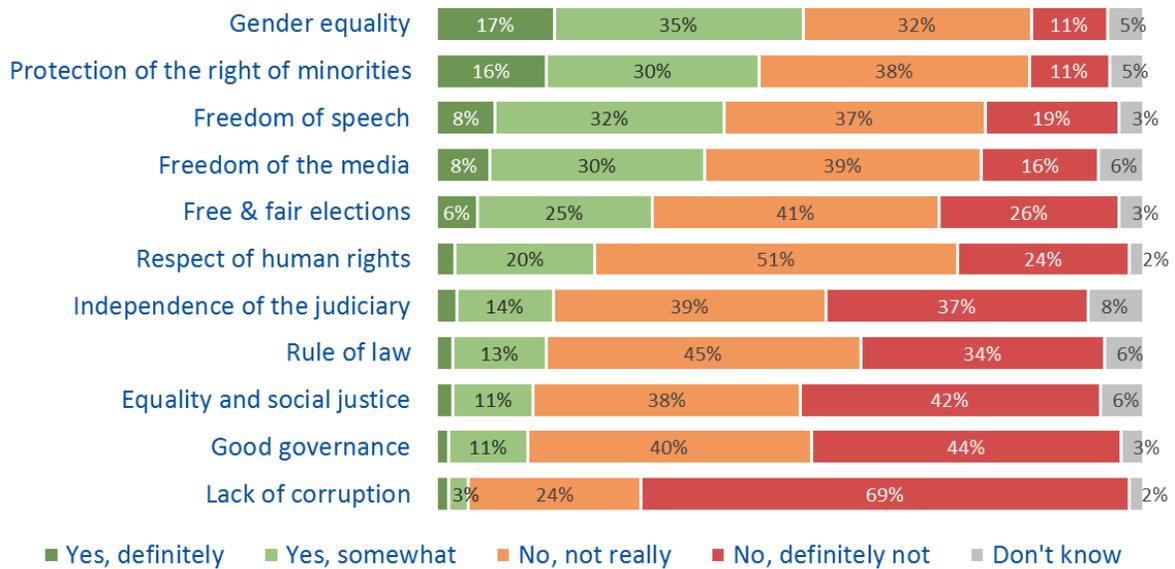
**Q4.3. On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy works in Moldova?**

		Satisfied	Not satisfied	Don't know	Total
<b>Settlement size</b>	Capital	12%	88%	0%	100%
	Between 20,000 and 150,000 inhabitants	15%	81%	4%	100%
	Less than 20,000 inhabitants	11%	82%	7%	100%
<b>Gender</b>	Male	10%	85%	5%	100%
	Female	13%	81%	6%	100%
<b>Age group</b>	15-34 years	14%	81%	5%	100%
	35-54 years	13%	86%	1%	100%
	55 years & above	6%	82%	12%	100%
<b>Education level</b>	Low level	12%	80%	8%	100%
	Medium level	11%	85%	4%	100%
	High level	11%	89%	0%	100%
<b>Employment status</b>	Employed	13%	83%	4%	100%
	Unemployed or temporarily not working / inactive	10%	82%	8%	100%
<b>Mother tongue</b>	Romanian	11%	84%	5%	100%
	Russian	16%	82%	2%	100%
<b>Geographical area</b>	Centre	15%	85%	0%	100%
	North	6%	79%	15%	100%
	South	12%	83%	5%	100%
<b>Total</b>		<b>11%</b>	<b>83%</b>	<b>6%</b>	<b>100%</b>

Just like in 2016, the most widely acknowledged elements of democracy that apply to Moldova are gender equality (52%), protection of the right of minorities (46%), freedom of speech (40%) and of the media (38%) (fig. 24).

Judiciary system, rule of law, good governance, equality and social justice, on the other hand, were assessed as satisfactory by around 15% of the population. The most pressing issue, however, appears to be corruption, as 93% of Moldovans feel that more work is needed to bring their democracy at an adequate level.

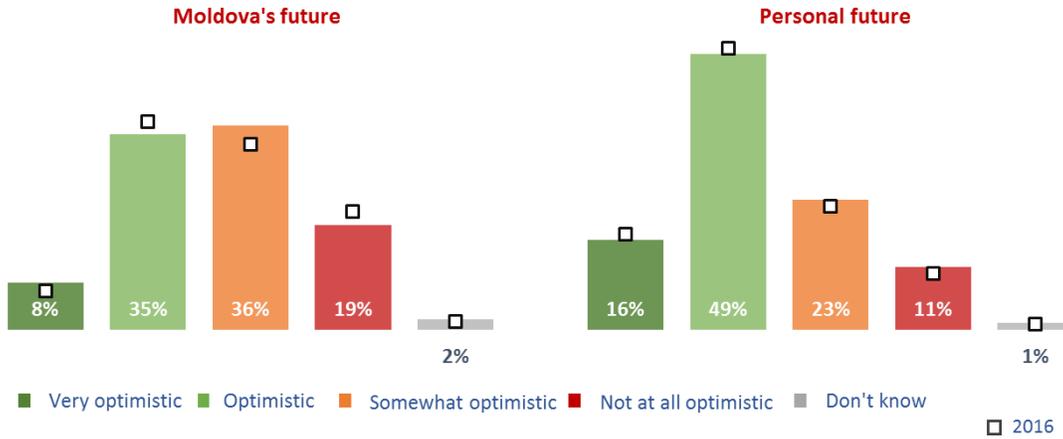
**FIGURE 24 – To what extent do you think that the following elements apply in Moldova? (Q4.4)**



### 3.4.2. Future expectations

Overall Moldovans are not particularly optimistic towards their country's future or their own future – although definitely more optimistic about the latter (65% versus 43%). Expectations over Moldova's future as well as personal hopes are in line with 2016 (fig. 25).

**FIGURE 25 – How optimistic are you about the future of your country? (Q4.5) & How optimistic are you about your personal future? (Q4.6)**



The degree of optimism towards Moldova’s future is closely linked to citizens’ mother tongue, settlement size and employment status. Nearly three out of four Russian speakers are pessimistic compared to over one out of two Romanian mother tongue. In addition, the larger the size of the cities Moldovans reside in, the more pessimistic they seem to be. Employed individuals are also more negative as compared to unemployed/temporarily inactive individuals (61% versus 51%). Males also appear to be slightly more pessimistic than women (tab. 14).

**TABLE 14 – Optimism regarding Moldova’s future**

Q4.5. How optimistic are you about the future of your country?		Optimistic	Pessimistic	Don't know	Total
Settlement size	Capital	38%	62%	0%	100%
	Between 20,000 and 150,000 inhabitants	45%	55%	0%	100%
	Less than 20,000 inhabitants	44%	53%	3%	100%
Gender	Male	41%	58%	1%	100%
	Female	45%	52%	3%	100%
Age group	15-34 years	48%	51%	1%	100%
	35-54 years	41%	58%	1%	100%
	55 years & above	39%	56%	5%	100%
Education level	Low level	40%	56%	4%	100%
	Medium level	44%	55%	1%	100%
	High level	49%	51%	0%	100%
Employment status	Employed	38%	61%	1%	100%
	Unemployed or temporarily not working / inactive	46%	51%	3%	100%
Mother tongue	Romanian	44%	54%	2%	100%
	Russian	25%	71%	4%	100%
Geographical area	Centre	50%	49%	1%	100%
	North	39%	58%	3%	100%
	South	37%	61%	2%	100%
<b>Total</b>		<b>43%</b>	<b>55%</b>	<b>2%</b>	<b>100%</b>

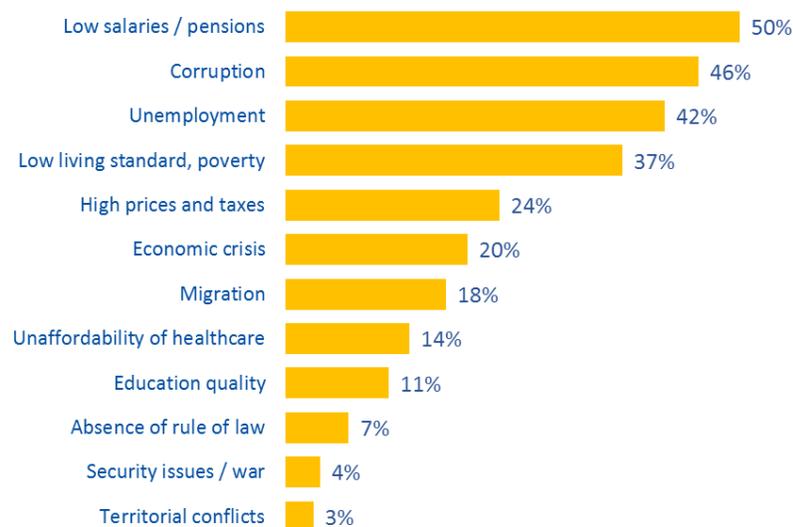
The attitude towards personal future, on the other hand, is most closely connected to age: 53% of individuals aged 55 years and over are pessimistic compared to 37% of individuals aged 34 to 55 years and 19% of younger people. Higher percentages of pessimistic were also found among southern residents (42%), females (38%), unemployed/temporarily inactive individuals (36%) and Russian mother tongue (39%) (tab. 15).

**TABLE 15 – Optimism regarding personal future**

Q4.6. How optimistic are you about your personal future?		Optimistic	Pessimistic	Don't know	Total
Settlement size	Capital	71%	29%	0%	100%
	Between 20,000 and 150,000 inhabitants	62%	37%	1%	100%
	Less than 20,000 inhabitants	63%	35%	2%	100%
Gender	Male	69%	30%	1%	100%
	Female	60%	38%	2%	100%
Age group	15-34 years	79%	19%	2%	100%
	35-54 years	63%	37%	0%	100%
	55 years & above	45%	53%	2%	100%
Education level	Low level	63%	35%	2%	100%
	Medium level	65%	34%	1%	100%
	High level	69%	31%	0%	100%
Employment status	Employed	68%	31%	1%	100%
	Unemployed or temporarily not working / inactive	62%	36%	2%	100%
Mother tongue	Romanian	68%	30%	2%	100%
	Russian	60%	39%	1%	100%
Geographical area	Centre	72%	28%	0%	100%
	North	64%	36%	0%	100%
	South	54%	42%	4%	100%
Total		65%	34%	1%	100%

Finally, the most pressing problem according to around half of Moldovan residents were low salaries/pensions (50%), corruption (46%) and unemployment (42%) (fig. 26). Territorial conflicts, security issues/war and absence of rule of law were rated as much less urgent – and chosen only by less than one in ten Moldovans.

**FIGURE 26 – What do you consider to be the most pressing problems facing your country? (Q4.2, multiple answers possible)**

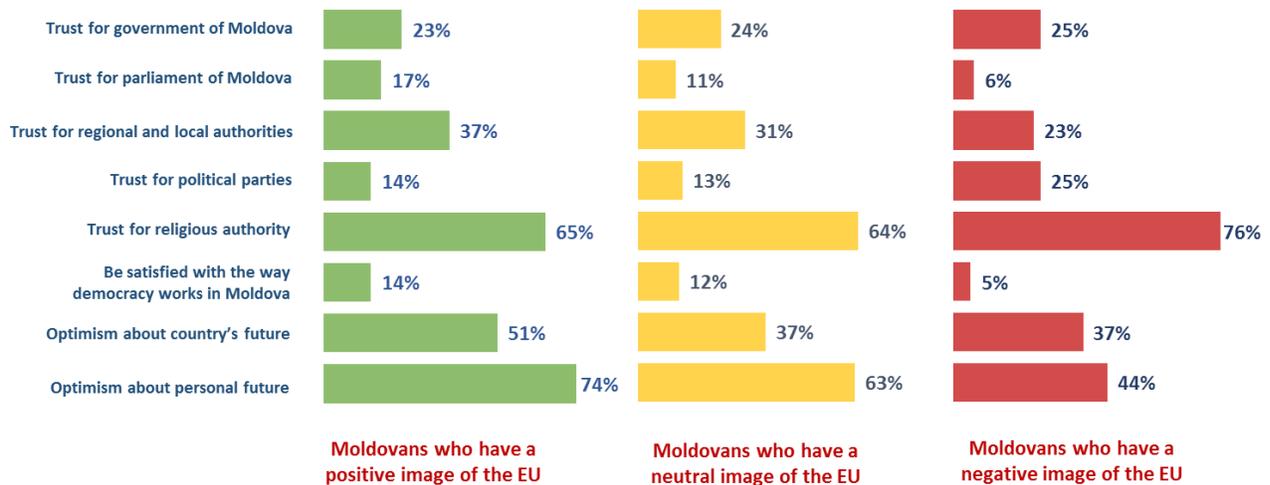


### 3.4.3. Views of the country and attitude towards the EU: snapshot

As in section 3.2.2, views of the country and attitude towards the EU have been analysed according to three main profiles: individuals that have a positive attitude towards the EU, those who are mostly neutral and those who tend to share a negative attitude towards the Union. Eight indicators were considered: trust in the government, trust in the parliament, trust in regional and local authorities, trust in political parties, trust in religious authority, satisfaction with the functioning of democracy, optimism about country's future, and optimism about personal future.

The first thing that should be noted is that individuals that have a negative image of the EU are also more likely to be more negatively oriented for all the assessed indicators, except for trust in religious authority, political parties and the government, in comparison to the neutral and positive population (fig. 27).<sup>16</sup> Over three out of four tend to trust the religious authority and over one out of four the political parties and the government. Positively oriented and neutrally oriented individuals tend to share similar level of trust towards the political parties, the government and religious authority, and a similar level of satisfaction with the way democracy works in Moldova. As for the other indicators, those with a positive image of the EU tend to be more optimistic compared to those who have a neutral image of the EU – in particular about country's and personal future.

**FIGURE 27 – Views of the country and attitude towards the EU: positive versus neutral and negative**



Almost everyone, regardless of their attitude towards the European Union, indicated the same pressing problems in Moldova, with low salaries/pensions, corruption, unemployment and low living standards/poverty being among the most important issues (between 35% and 64%).<sup>17</sup> However, while those who have a negative and neutral perception seem more concerned about the level of salaries and pensions, individuals that have a positive image of the EU are mostly worried about corruption.

<sup>16</sup> More details on main findings are provided in Annex, Table A8.

<sup>17</sup> More details on main findings are provided in Annex, Table A9.

## 4. Annex

**TABLE A1 – Benefits from current EU support**

Q2.8. To what extent would you say that Moldova has benefitted from the current European Union support in the following areas?						
	Very much	Fairly	Not very much	Not at all	Don't know	Total
More tourism	5%	35%	27%	20%	13%	100%
Improved infrastructure	5%	34%	38%	16%	6%	100%
Access to more products and services	4%	36%	29%	21%	10%	100%
Better education	7%	28%	35%	20%	10%	100%
Improved trade	3%	32%	33%	21%	11%	100%
Improved quality of health-care system	5%	26%	36%	25%	8%	100%
Greater employment opportunities	4%	23%	35%	30%	8%	100%
Improved agricultural production	4%	23%	39%	25%	9%	100%
Improved democracy	2%	25%	36%	24%	13%	100%
Greater economic development	2%	20%	37%	30%	11%	100%
Better law enforcement	3%	17%	32%	39%	9%	100%
Improved quality of the justice system	2%	14%	36%	35%	13%	100%
Less corruption	1%	11%	30%	49%	9%	100%

**TABLE A2 – Areas in which the EU should play a greater role**

Q2.9. Please tell us in which sectors you think the European Union should play a greater role		
	The specific item was selected as the first most important area	The specific item was selected as the first or second or third most important area
Reduce corruption	20%	53%
Improve quality of health-care system	10%	38%
Promote economic development	16%	37%
Create greater employment opportunities	14%	32%
Improve infrastructure	6%	25%
Promote a better education	7%	22%
Improve agricultural production	5%	20%
Improve quality of the justice system	6%	18%
Promote better law enforcement	4%	16%
Improve democracy	4%	12%
Promote access to more products and services	2%	7%
Improve trade	2%	7%
Increase tourism	2%	5%

**TABLE A3 – Attitudes towards the EU: positive versus neutral and negative**

		Image of the EU		
		Positive	Neutral	Negative
Trust towards the EU	Tend to trust	84%	42%	6%
	Tend not to trust	12%	51%	90%
	Do not know	4%	7%	4%
	Total	100%	100%	100%
Relations between the EU and Moldova	Good	83%	65%	35%
	Bad	11%	29%	51%
	Don't know/No relations	6%	6%	14%
	Total	100%	100%	100%
Awareness of financial support by the EU	Yes	91%	73%	66%
	No	3%	14%	19%
	Don't know	6%	13%	15%
	Total	100%	100%	100%
Effectiveness of the EU's support	Effective	50%	31%	8%
	Not effective	48%	63%	82%
	Don't know	2%	6%	10%
	Total	100%	100%	100%

**TABLE A4 – Trust towards different type of media**

Q3.9. & Q3.10. Which is your level of trust for following media as a source of information?				
	Tend to trust	Tend not to trust	Don't know	Total
Official EU website	19%	34%	47%	100%
Television	60%	36%	4%	100%
Radio	36%	42%	22%	100%
Print media	26%	45%	29%	100%
Social media	27%	41%	32%	100%
Internet	47%	31%	22%	100%
Word of mouth	43%	47%	10%	100%
<b>Country's media in national language</b>				
Country's media in national language	59%	35%	6%	100%
Country's media in Russian	49%	45%	6%	100%
Country's media in other languages	15%	49%	36%	100%
<b>Foreign media in Russian</b>				
Foreign media in Russian	35%	47%	18%	100%
<b>Foreign media in other languages</b>				
Foreign media in other languages	16%	46%	38%	100%

**TABLE A5 – Source of information and quality of information about the EU**

		Type of media frequently used as source of information (Q3.7 & Q3.8)				
		Only traditional media	Social media or internet	In national language	In Russian	In other language
<b>Exposure to information about the EU</b>	Yes	63%	72%	77%	71%	80%
	No	37%	28%	23%	29%	20%
	Total	100%	100%	100%	100%	100%
<b>Representation of the EU in the national media</b>	Positive	54%	63%	64%	58%	68%
	Neutral	34%	27%	28%	31%	22%
	Negative	6%	6%	5%	6%	7%
	Don't know	6%	4%	3%	5%	3%
	Total	100%	100%	100%	100%	100%
<b>Helpfulness to understand the EU</b>	Helpful	27%	73%	60%	51%	64%
	Not helpful	60%	26%	35%	44%	31%
	Don't know	13%	1%	5%	6%	5%
	Total	100%	100%	100%	100%	100%
<b>Looking for information about the EU</b>	Frequently	9%	30%	27%	19%	37%
	Not very frequently	13%	28%	25%	23%	16%
	Never	78%	42%	48%	58%	47%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

**TABLE A6 – Type of media frequently used as a source of information and attitude towards the EU**

		Type of media frequently used as source of information (Q3.8)		Word of mouth frequently used as source of information (Q3.8)	
		Only traditional media	Social media or internet	Yes	No
<b>Perception of the EU</b>	Positive	25%	54%	41%	45%
	Neutral	48%	34%	41%	38%
	Negative	26%	11%	18%	16%
	Don't know	1%	1%	0%	1%
	Total	100%	100%	100%	100%
<b>Trust towards the EU</b>	Tend to trust	41%	62%	58%	50%
	Tend not to trust	55%	33%	39%	43%
	Do not know	4%	5%	3%	7%
	Total	100%	100%	100%	100%
<b>Relations between the EU and Moldova</b>	Good	60%	73%	69%	66%
	Bad	30%	22%	25%	25%
	Don't know/No relations	10%	5%	6%	9%
	Total	100%	100%	100%	100%
<b>Awareness of financial support by the EU</b>	Yes	69%	88%	81%	78%
	No	15%	5%	12%	7%
	Don't know	16%	7%	7%	15%
	Total	100%	100%	100%	100%
<b>Effectiveness of the EU's support</b>	Effective	31%	41%	40%	34%
	Not effective	62%	57%	57%	59%
	Don't know	7%	2%	3%	7%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

**TABLE A7 – Frequent usage of media in local language, Russian and other foreign language and attitude towards the EU**

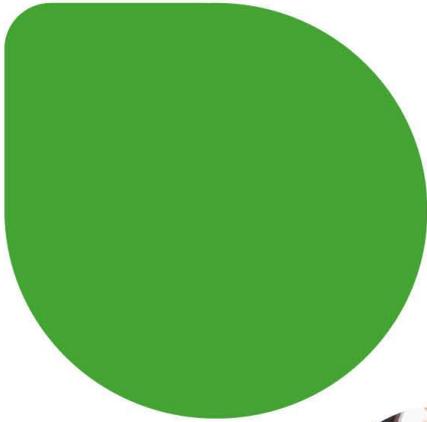
		Type of media frequently used as source of information (Q3.7)		
		In national language	In Russian	In other language
<b>Perception of the EU</b>	Positive	48%	37%	52%
	Neutral	39%	40%	35%
	Negative	12%	22%	12%
	Don't know	1%	1%	1%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
<b>Trust towards the EU</b>	Tend to trust	62%	48%	65%
	Tend not to trust	34%	47%	34%
	Do not know	4%	5%	1%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
<b>Relations between the EU and Moldova</b>	Good	74%	65%	72%
	Bad	21%	28%	25%
	Don't know/No relations	5%	7%	3%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
<b>Awareness of financial support by the EU</b>	Yes	83%	80%	93%
	No	8%	10%	4%
	Don't know	10%	10%	2%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
<b>Effectiveness of the EU's support</b>	Effective	41%	34%	35%
	Not effective	55%	60%	58%
	Don't know	3%	6%	8%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

**TABLE A8 – Views of the country and attitude towards the EU: positive versus neutral and negative**

		Attitude towards the EU		
		Positive	Neutral	Negative
<b>Trust for government of Moldova</b>	Tend to trust	23%	24%	25%
	Tend not to trust	75%	69%	75%
	Don't know	2%	7%	0%
	Total	100%	100%	100%
<b>Trust for parliament of Moldova</b>	Tend to trust	17%	11%	6%
	Tend not to trust	81%	82%	94%
	Don't know	2%	7%	0%
	Total	100%	100%	100%
<b>Trust for regional and local authorities</b>	Tend to trust	37%	31%	23%
	Tend not to trust	59%	61%	71%
	Don't know	4%	8%	6%
	Total	100%	100%	100%
<b>Trust for political parties</b>	Tend to trust	14%	13%	25%
	Tend not to trust	81%	78%	75%
	Don't know	5%	9%	0%
	Total	100%	100%	100%
<b>Trust for religious authority</b>	Tend to trust	65%	64%	76%
	Tend not to trust	33%	30%	22%
	Don't know	2%	6%	2%
	Total	100%	100%	100%
<b>Satisfaction with the way democracy works in Moldova</b>	Yes	14%	12%	5%
	No	83%	85%	76%
	Don't know	3%	3%	19%
	Total	100%	100%	100%
<b>Optimism about country's future</b>	Optimistic	51%	37%	37%
	Pessimistic	48%	59%	61%
	Don't know	1%	4%	2%
	Total	100%	100%	100%
<b>Optimism about personal future</b>	Optimistic	74%	63%	44%
	Pessimistic	24%	36%	55%
	Don't know	2%	1%	1%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

**TABLE A9 – Most pressing problems in Moldova**

<b>Q4.2. What do you consider to be the most pressing problems facing your country? (multiple answers possible)</b>			
	<b>Attitude towards the EU</b>		
	<b>Positive</b>	<b>Neutral</b>	<b>Negative</b>
<b>Corruption</b>	48%	42%	49%
<b>Low salaries / pensions</b>	44%	51%	64%
<b>Unemployment</b>	37%	47%	45%
<b>Low living standard, poverty</b>	35%	39%	39%
<b>Economic crisis</b>	22%	21%	13%
<b>Migration</b>	21%	17%	11%
<b>High prices and taxes</b>	21%	23%	31%
<b>Education quality</b>	19%	8%	2%
<b>Unaffordability of healthcare</b>	11%	18%	10%
<b>Absence of rule of law</b>	10%	5%	6%
<b>Territorial conflicts</b>	5%	2%	1%
<b>Security issues / war</b>	5%	3%	3%



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