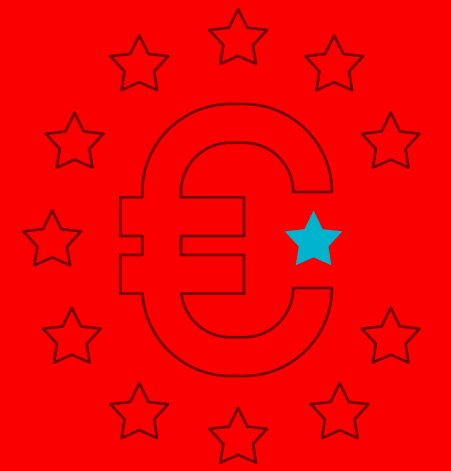


02/2021



Digitising Europe Pulse #4

Focus on the EU Recovery and Resilience Facility

KANTAR



Vodafone Institute
for Society and
Communications



Focus on the European Union's Recovery and Resilience Facility

The impact of the Covid-19 pandemic is a huge challenge for Europe. That is why the EU has launched the Recovery and Resilience Facility (RRF), the largest support programme in its history.



The centrepiece of the NextGenerationEU, it is designed to help cushion the coronavirus pandemic's impact on the economy and society with loans and grants totalling

€672.5 billion

to support reforms and investments by EU countries.

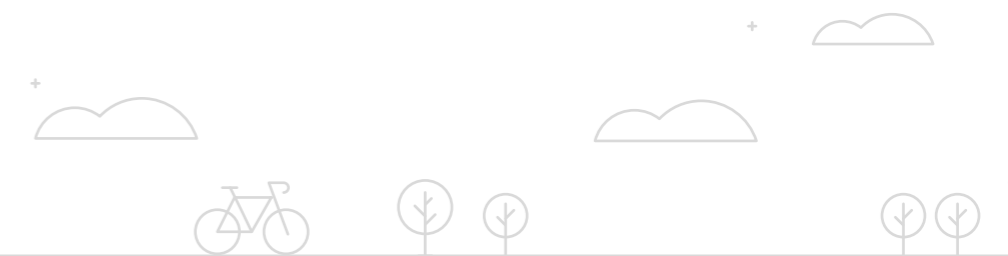


After the outbreak of the first wave in early 2020, the Vodafone Institute dedicated one part of its survey series "Digitising Europe Pulse" to the immediate impact of the pandemic ("Challenges in Times of Covid-19", 2020)

In December 2020, we designed another survey to address the EU support programme. Together with Kantar, we surveyed around 15,000 people in 15 European countries

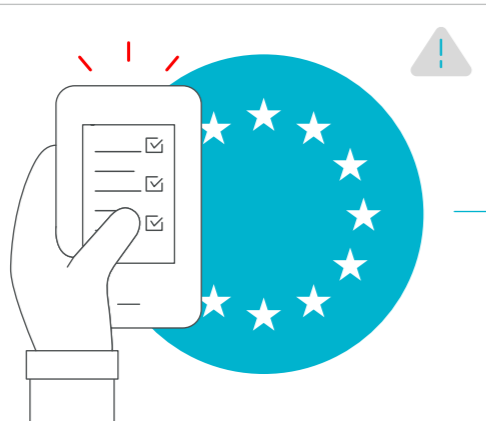
What hopes do people associate with this programme? Do they believe it will be successful? Where are the biggest hurdles?

The results of this "Digitising Europe Pulse" underscore that citizens are looking to their national governments to solve the acute health and economic crisis in the short term. But they also acknowledge the role of the European Union in establishing a long-term strategy to ensure that Europe emerges even stronger from the crisis.



1 Key findings

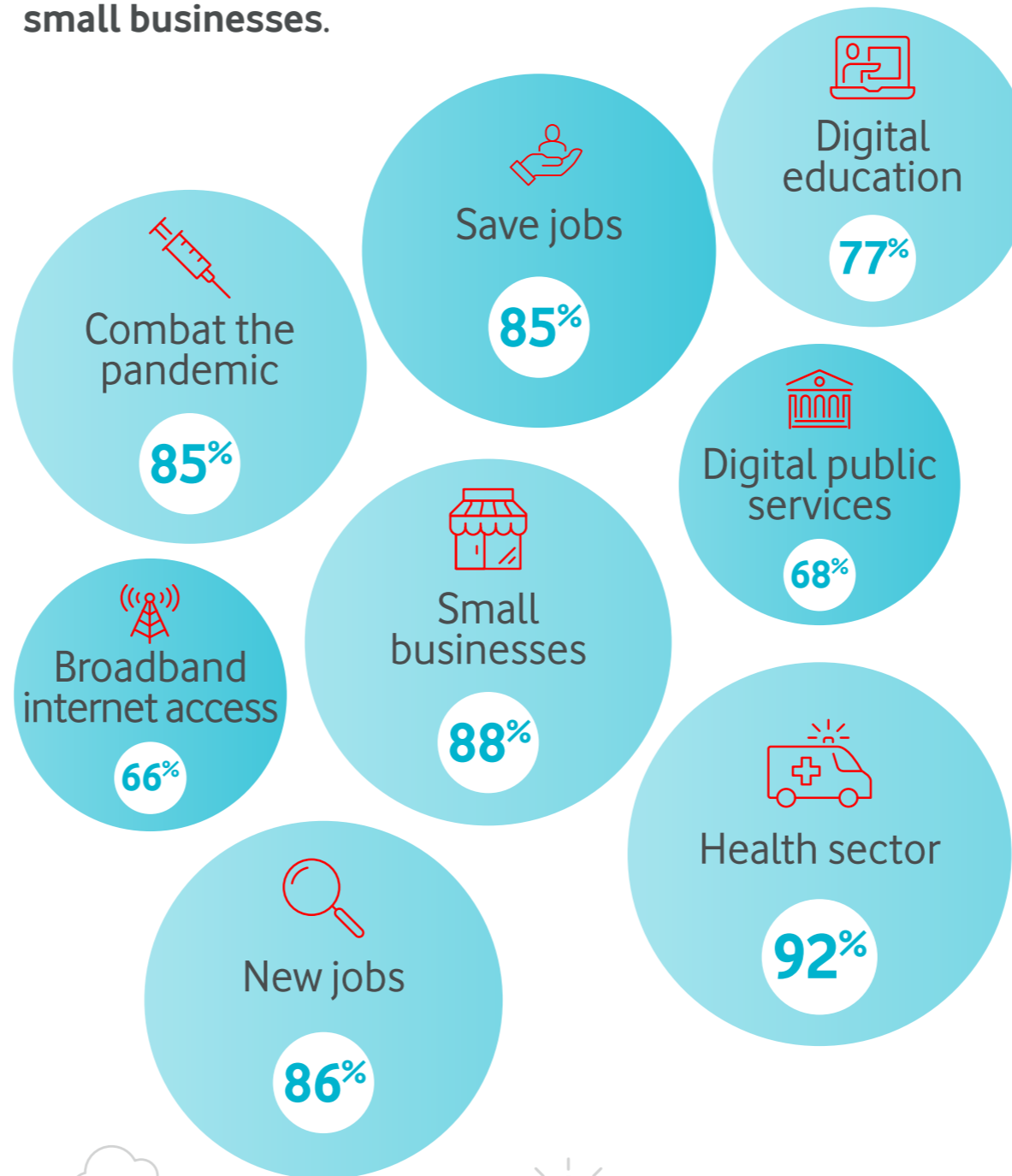
The complete “Digitising Europe Pulse”, with additional results from the December surveys and selected expert opinions, will be published in the coming weeks.



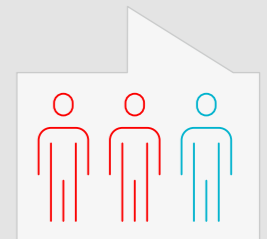
80%

of Europeans are **aware of the European Union’s Recovery and Resilience Facility (RRF).**

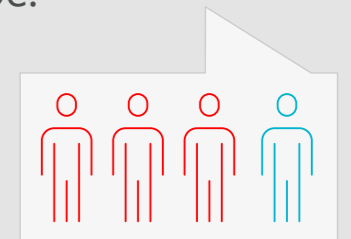
The vast majority believe the scheme should focus primarily on the **health sector** and on creating opportunities for **small businesses**.



However, **one out of three respondents** is concerned that when it comes to recovery funds being disbursed, **their country will divert** the money into industry bailouts, furlough programs, and business competition schemes.



Three out of four Europeans think **digital public services**, digital skills, and broadband internet access are **important aspects for the economic** recovery in Europe.



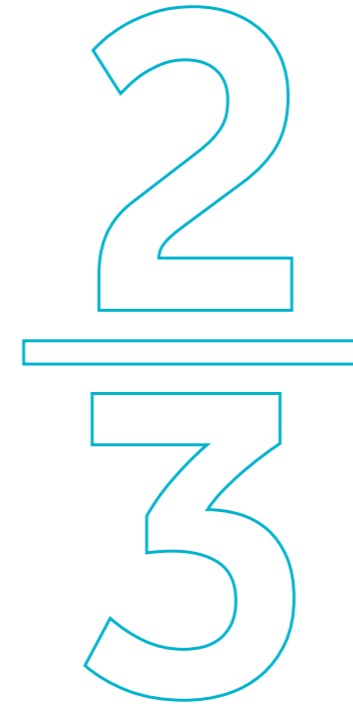
2

The results in detail



80% of Europeans are **aware of the EU's Recovery and Resilience Facility (RRF)**

80% of Europeans are aware of the European Union's Recovery and Resilience Facility (RRF). However, **only 22% of those surveyed are familiar with the details of the RRF**. General awareness varies across the bloc, with southern European countries like Greece, Portugal, and Italy demonstrating an awareness above 90%, whereas only one out of two citizens in the United Kingdom, a former EU member state, have heard of the RRF. The highest level of familiarity with the details was found in Poland and Italy. Those surveyed in the Czech Republic and Estonia are least aware of the details.



More than two-thirds say they are **confident the funds will help European countries recover from the crisis**.

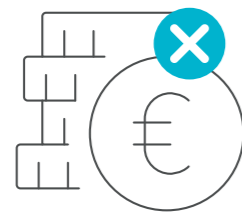


Almost 70% agree that the recovery package is an effective measure for helping European countries manage their recovery. While people in Germany and the UK are the most sceptical about the outcome of the scheme, southern European countries like Spain, Greece, and Portugal are more confident that the RRF will be a success. Still, in **some countries** – like the UK, France, and Sweden – one out of three respondents say they **don't know if the recovery package will contribute to a successful recovery**.



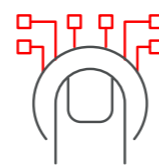
3

The results in detail



Around one-third of Europeans are worried about **improper use of funding**

About one-third of Europeans surveyed think their government will use the funding as intended, while another third believe it will be used for other purposes. 29% responded that they do not know how the money will be spent. Citizens in Greece (48%), Germany (43%), Spain (41%), and Hungary (39%) are most likely to believe that their governments will divert funding to areas other than those intended. In the Netherlands, Portugal, Sweden, and the UK, only between 22% and 33% of respondents think the funds will be reallocated.



Three-quarters of Europeans see **digital key areas as important for recovery**

All five digital key areas for recovery are rated quite highly. The top three are digital public services (75%), digital skills (74%), and broadband internet access (73%). These values are largely stable across the EU, with only minor deviations. Still, awareness of the digital key areas does differ between European countries. While awareness in Romania and Portugal is the highest, it is consistently low among respondents from the Netherlands and the UK. Only 58% of Dutch respondents and 61% of the British state that digital skills are key for recovery. By contrast, 81% of the Portuguese and 82% of the Romanians consider digital skills to be key for recovery.



4

The results in detail

Most Europeans favour an allocation that is **subject to certain conditions.**

40%

Strict conditions for national governments

35%

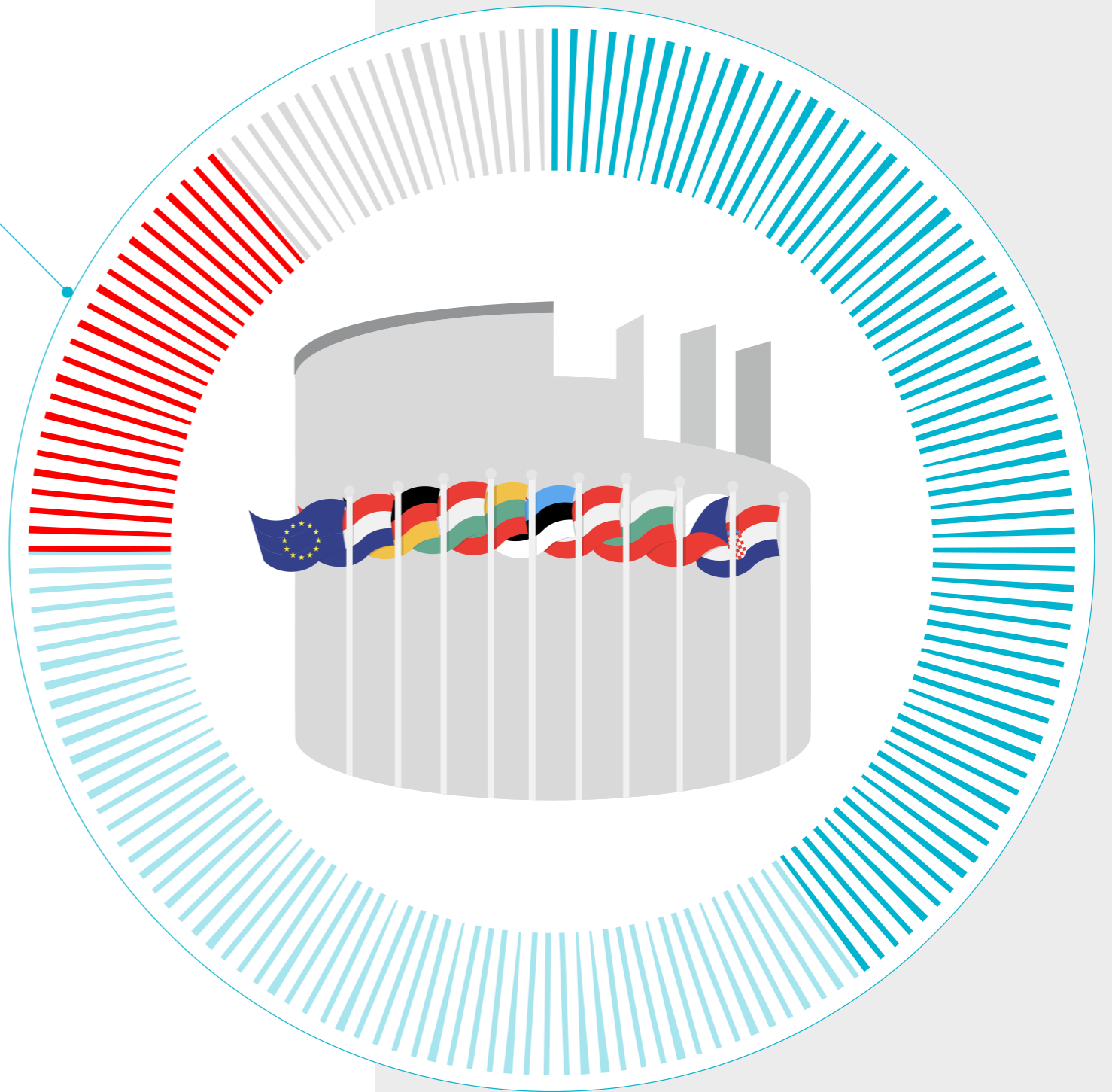
Flexible conditions for national governments

14%

No conditions for national governments

11%

Don't know



5

Role of Digitisation



The RRF will make

€672.5

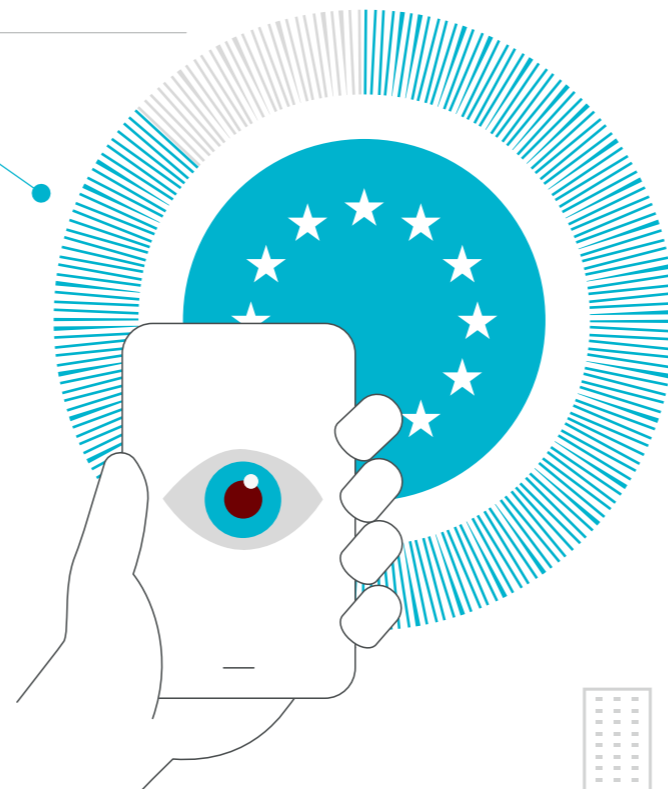
BILLION

in grants and loans available to support reforms and investments aimed at mitigating the economic and social impacts of Covid-19 and making **European economies and societies more digital, sustainable, and resilient.**



85%

With internet usage increasing year-on-year and 85% of **Europeans using it at least once per week**, it is a vital resource for the continent.*



* According to the Digital Economy and Society Index Report 2020 - Use of Internet Services.

** According to Digital Economy and Society Index Report 2020 - Integration of Digital Technology.



This latest survey from the **Vodafone Institute** is the fourth of its kind and reveals the public attitudes towards the fund and how it should be spent, demonstrating the **value citizens place on small businesses** in particular. Just prior to the pandemic, data showed that the **vast majority** of SMEs reported they were **not yet using technologies** such as cloud and data analytics, and only 17.5% of SMEs sold products online in 2019.**

Adopting new digital tools will help businesses recover from the crisis and thrive in the future.

