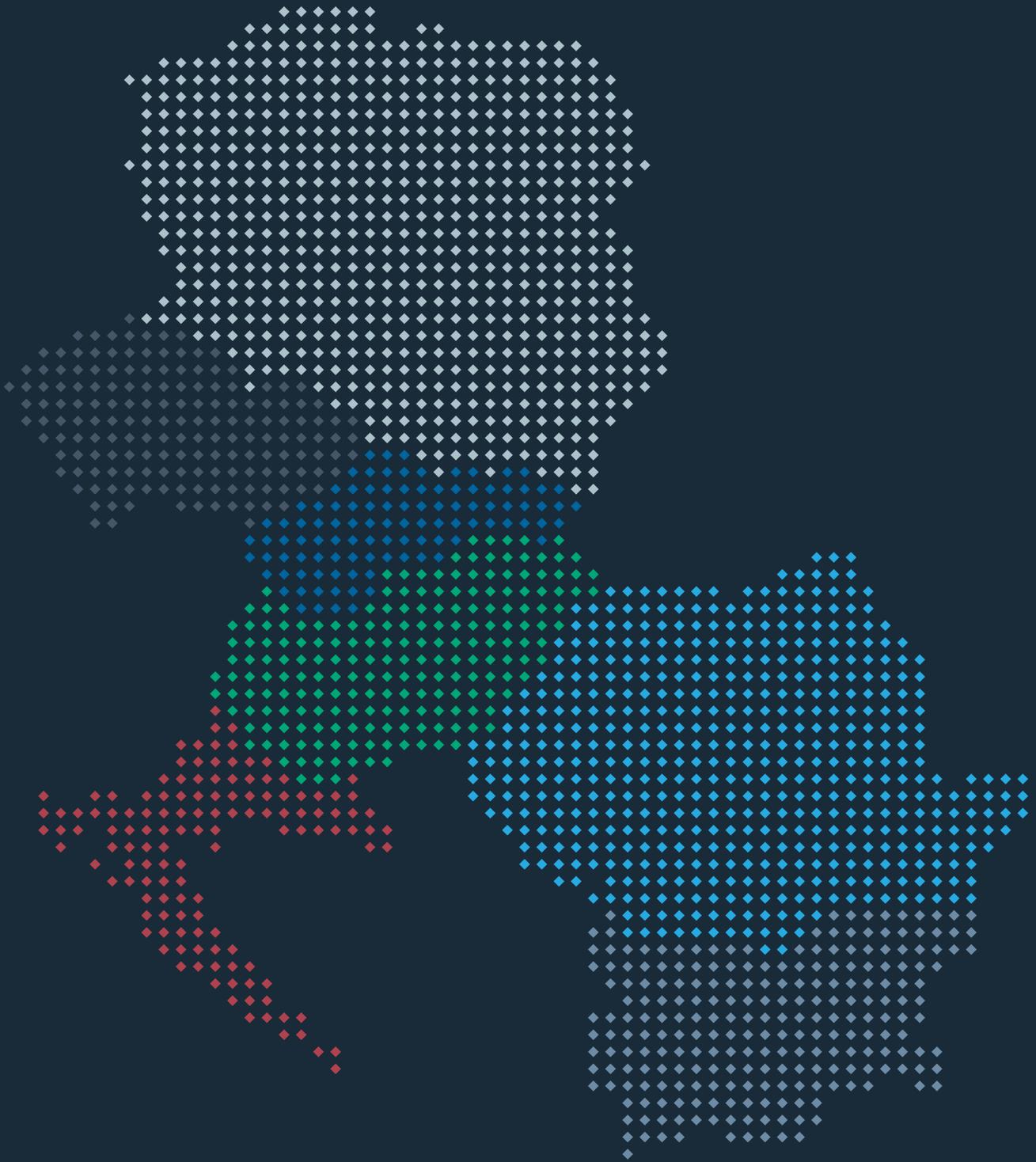




GLOBSEC **Trends** **2017**

**Mixed Messages
and Signs of Hope from
Central & Eastern Europe**

Countries surveyed



- ◆ Bulgaria
- ◆ Croatia
- ◆ Czech Republic
- ◆ Hungary
- ◆ Poland
- ◆ Romania
- ◆ Slovakia

GLOBSEC Trends 2017

**Mixed Messages
and Signs of Hope from
Central & Eastern Europe**

Methodology

The outcomes and findings of this report are based on public opinion surveys carried out in the form of personal interviews using stratified multistage random sampling from February to April 2017 on a representative sample of the population in seven EU and NATO member states: Bulgaria, Croatia, the Czech Republic, Hungary, Poland, Romania, and Slovakia.

For all countries, the profiles of the respondents are representative of the country by sex, age, education, place of residence and size of settlement. „Do not know“ responses were not included in data visualizations.

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Foreword

Jakub Wiśniewski

Vice President of GLOBSEC
and Director of the GLOBSEC Policy Institute

Central and Eastern Europe increasingly matters and what people think matters too. Before 1989, the notion of Central Europe, situated geographically in the center – culturally in the West and politically in the East, became a kind of a metaphor of resistance against sovietization. Thus, for intellectuals such as Milan Kundera, Václav Havel, György Konrád, Leszek Kołakowski, the region was defined by values rather than by geography. As Vaclav Havel indicated in the Polish Parliament in 1990, *“we have an opportunity to transform Central Europe from what has been a mainly historical and spiritual phenomenon into a political phenomenon. (...) We can offer the inspiration to consider swift and daring solutions”*.

Over the last two decades, Central and Eastern Europe has been evolving in the West European image: from a *terra obscura* to the successful EU presidencies; from ‘catching-up’ with Europe to acting as one of its architects; geography no longer determines our destiny, is not a burden or a curse for the region; from being an object of history to becoming its subject; we are no longer content to simply be members of the Euro-Atlantic community; we increasingly want to shape it. People of the region are fully-fledged citizens of Europe.

This region has seen it all. Under communism we have suffered poverty, deprivation, suppressive governments. This has given us bitter memories, but also wisdom. We are able to see the true worth of the European and Transatlantic project. People of Central and Eastern Europe want to be part of the EU and NATO and there is no appetite for exit à *la Britannique*. And here is the second piece of good news: having lived through the Soviet domination, citizens believe in liberal democracy.

This is the main positive message of the current edition of the GLOBSEC Trends. What we see is not always cheerful or comforting. Some people are confused because of disinformation or conspiracy theories. As elsewhere in the world social media has emerged as an important means of mass communication and this poses many challenges. There is a troubling common perception that countries can happily straddle the fence between the East and the West without taking a geopolitical stance.

What is the lesson to be learned here for politicians?

First, Central Europe is still a distinctive entity. John Donne’s memorable phrase – *“No man is an island entire of itself”* – rings more true than ever.



We are in the same boat as a region – geopolitically, economically, militarily. After 1989 we have had the same strategic goals in our foreign policies. We are mindful of the lessons history has taught us in the 20th century: as countries of the region we gain independence together, we lose it together only to regain it once again together. Today's circumstances are not as dramatic as in the past, but the lesson still holds true: we may be strong together or fade into oblivion individually.

Europe aspires to be united, and we are struggling to make this a reality. But, still, by virtue of its bumpy history and tradition, Europe has a strong regional distinction that must not be discounted. No-one wishes to indulge in any kind of social engineering, in an effort to create an artificial “*homo Europaeus*”, an ahistorical and utopian figure. We believe that we are stronger because of our differences, be it cultural, linguistic or religious. These domains should forever remain in the purview of the nation state.

Second, Central and Eastern Europe is not uniform in its policies, decisions, choices. We need to translate differences into strengths. Times of Soviet Union-imposed standards are long gone. We are free to differ in our opinions. Slovakia is in the eurozone.

The Czech Republic wants to be in the slower lane of EU integration. Polish people are traditionally some of the most pro-EU citizens. These differences can make us stronger at a European level.

Third, people have a right to demand leadership from politicians, and full disclosure of what it means to be NATO or EU member. Citizens need to feel that their views matter and their governments can make their voices heard at the international level. We must not be a passive and reactive observer of the current developments.

Societal trends are crucial in predicting long-term political landscapes as people elect governments not the other way round. The GLOBSEC Trends 2017 provides a rare opportunity to look into the minds of Central and Eastern Europeans, and politicians would be wise to pay attention.

Wiśniewski

7 insights from 7 countries



01

The Czech Republic, Hungary and Slovakia favour a neutral position between West and East despite being members of both the EU and NATO.



02

People vs. politicians: in contrast to the Eurosceptic political rhetoric coming from some parts of the Central and Eastern Europe, public support for the EU remains very high across the region.



03

NATO membership is valued as a security guarantee in the region, but support for hosting NATO facilities is lukewarm in 4 out of 7 countries.



04

Bedrock liberal democracy: in 6 out of 7 countries the majority prefers liberal democracy over a strong autocratic leader.



05

What are media hiding from Poles and Croats? Two thirds of Poles and Croats do not believe media provide a true picture of reality.



06

10 million people in CEE trust fake news and disinformation websites.



07

Young people are much more prone to trust fake news than any other age group.

No turning to the East

Neither with the East, nor with the West — “the in-betweeners”

In all 7 Central and East European (CEE) countries surveyed (Bulgaria, Croatia, the Czech Republic, Hungary, Poland, Romania, Slovakia), more people support a pro-Western geopolitical orientation than pro-Eastern, with the open support of the latter being marginal. However, in the Czech Republic, Slovakia and Hungary, most people choose not to side with either the West or East, preferring an “in between” position. This is, to a large extent, due to the geographical position of the three between East and West and the desire to control their own country’s fate and direction. The 20th century developments in this region also contributed to a general scepticism and lower trust in either the “East” or the “West” and was transformed into a desire to be neutral and independent. The historical context also has shaped the attitudes of many into more calculative behaviour, inclining to “play on both fronts” to stay on the safe side and get “the best of both worlds”.

The grey zone as vulnerability

This ambivalence could be a vulnerability as external actors try to undermine the current pro-Western geopolitical orientation of this region. To do so, these actors try to sway the grey middle under the pretext of limiting “unhealthy” dependence on the West (EU, NATO). Such attempts are often wrapped in rhetoric calling for more independence and neutrality, which is only a cover for increasing the pro-Eastern geopolitical orientation. It is clear that open calls for closer affiliation to the East will not be very effective since the great majority of people in all CEE countries rejects the open pro-Eastern geopolitical orientation of their countries; however, they support a middle position.

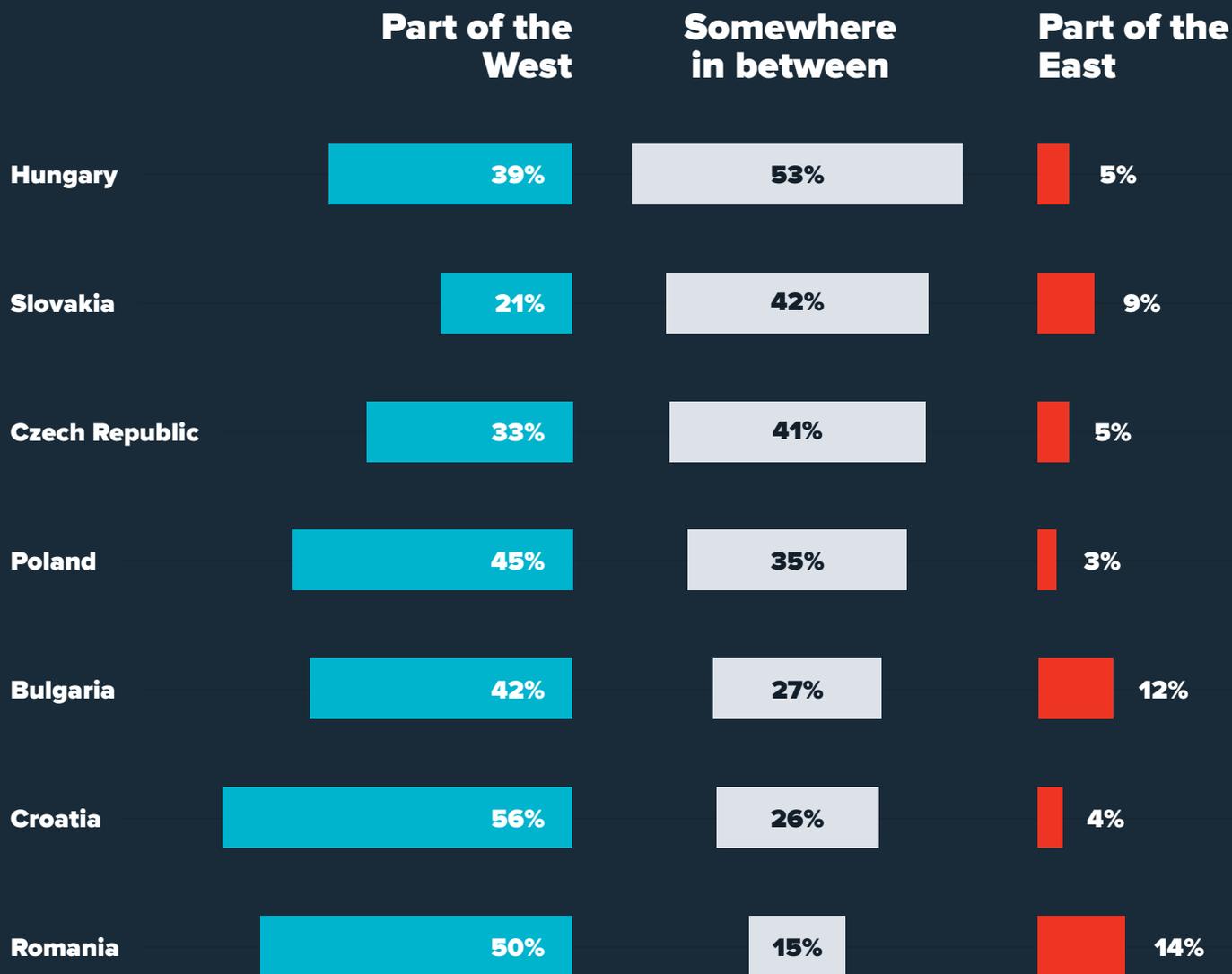
Economic benefits as the main pro-Western pull factor

The most common arguments behind choosing the West as the most desired geopolitical orientation

are economically motivated. Higher standard of living, social security and economic growth generally dominate the values and identity-based arguments and further indicate the region’s vulnerability. The potential weakening of the “West” as guarantor of economic stability in the future might strongly undermine the region’s inclination and desire to be part of the bloc.

21%

Lowest support to the West in Slovakia



Why West?

- Higher standard of living and prosperity
- Economic growth
- European identity, sense of belonging to the West

Why in between?

- Preserve neutrality and sovereignty
- Have the “best of both worlds”
- Geographical location
- Complicated history of the region

Why East?

- Historical and cultural links
- Identity and Slavic heritage
- West seen as arrogant and not treating people of CEE countries as equals

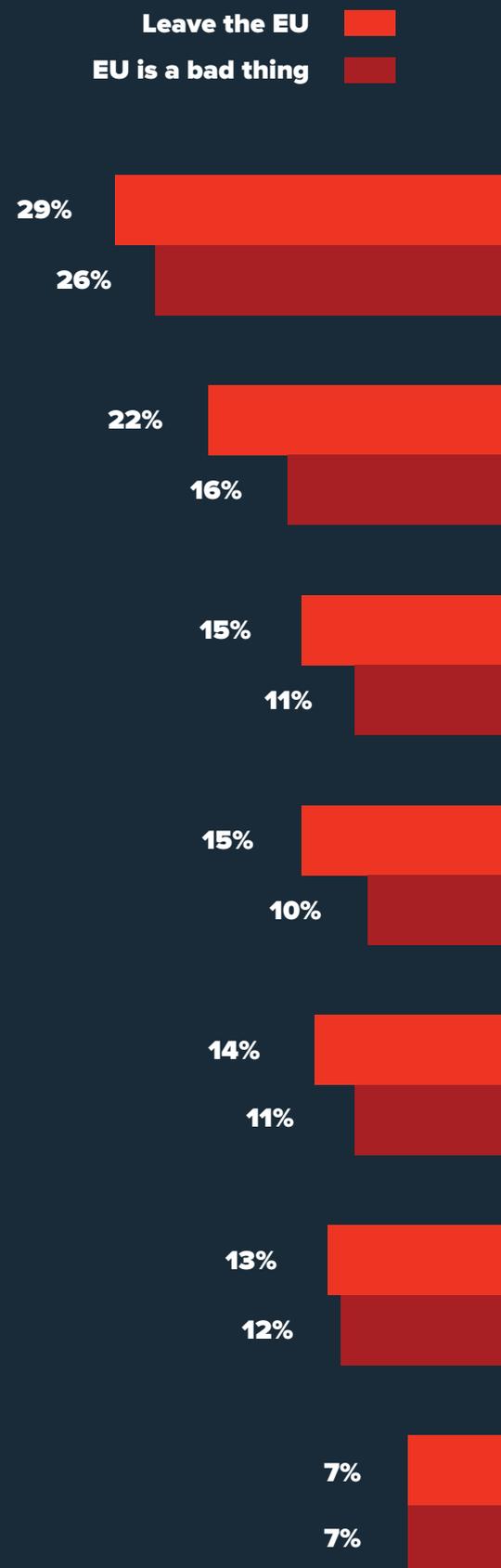
With or without the EU?

In contrast to the Eurosceptic political rhetoric coming from some parts of the CEE region, public support for the EU remains very high in almost all countries. A clear majority of the population views membership of the EU positively and would vote to remain in the EU in a referendum. The only exception is the Czech Republic, which turned out to be the biggest Eurosceptic country of the group in all aspects. As such, it is the only country where less than half of the population would vote to stay in the EU membership if there were a referendum. Yet, when asked about their perception of EU membership, more people support it than oppose it.

We are staying!

If a referendum on EU membership had been held in spring 2017, when the survey was conducted, all countries in the CEE region probably would have remained. In all seven countries, the willingness to stay in the European Union was proportionally higher than the percentage expressing a genuinely

positive attitude towards the EU. It is clear despite some scepticism (fuelled also by local politicians) that people in the CEE value EU membership and, if asked, would overwhelmingly support their country's membership of the EU. A similar understanding applies to the negative attitudes. As the percentage of people who think of the EU as neither good nor bad for their country are relatively high (on average 25%), they are distributed among both camps of those who would vote to stay and those who would leave the EU. Consequently, in all countries, except Romania, the percentage of respondents who would vote to "leave" exceeded the percentage of those dissatisfied with EU membership.



**Biggest Eurosceptics
in the CEE still live
in the Czech Republic**

Stay in the EU
EU is a good thing

41%

35%

**Czech
Republic**

70%

52%

Croatia

59%

52%

Slovakia

72%

61%

Bulgaria

79%

61%

Hungary

80%

78%

Poland

80%

70%

Romania

NATO: Security yes, facilities no

The background of the page is a grayscale photograph showing the silhouettes of several military aircraft and a helicopter in flight against a cloudy sky. The aircraft are positioned on the left side, and a large helicopter is in the center-right. The overall tone is somber and military.

CEE people cherish NATO security guarantee

The perception of NATO in the 7 CEE countries varies considerably and also reflects the broader geopolitical affiliation of the population in the surveyed countries. Some results correspond to the views of the population of the given country towards the US (anti-Americanism) while others reflect 20th century history or their economic, cultural and religious proximity to Russia. Regardless of their perspective on other aspects of NATO membership, people in the region

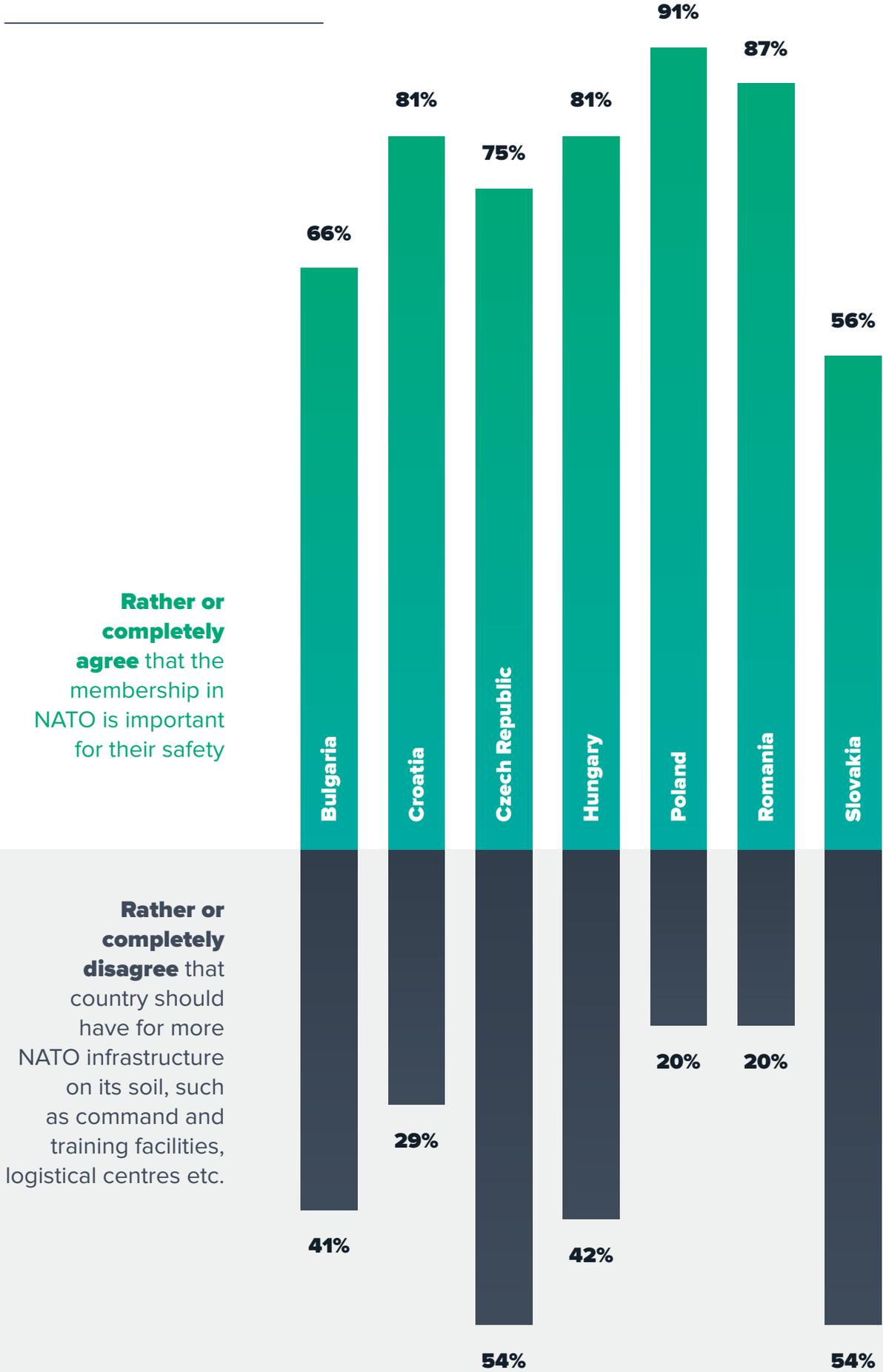
understand and value the security guarantee provided by NATO. As such, NATO membership is perceived to be important for security and safety by more than half of the population in all the surveyed countries.

No NATO boots on the ground

However, when it comes to the NATO presence and installations in a given country, only a majority in Poland, Romania and Croatia would support hosting such NATO installations on their soil. Even in countries that otherwise have strong support for

NATO, the issue of new NATO facilities is contentious. In the Czech Republic and Slovakia, the majority would reject it while in Bulgaria and Hungary (which already hosts a NATO airbase), the camp of supporters of installations has a very small lead over the opponents. The reasons for such antipathy are different in each country. In some, the negative perception stems from the heritage of Soviet occupation and thus the presence of any foreign troops is seen negatively. In others, it is the outcome of concerted efforts by domestic and external actors to use NATO facilities to campaign against NATO as such.

On average **76.7%** of people in CEE consider NATO important for their safety



NATO allies: Will CEE come to help?

Central Europeans would honour their Article 5 obligations

One element CEE countries have in common is solidarity with their NATO allies. Despite all the regional differences, the people of the CEE would help their NATO allies in case of an attack. With the notable exception of Bulgaria, in all the other countries more than 50% would honour their country's pledge and defend a fellow NATO ally if attacked. More concretely, 9 in 10 Poles, 8 in 10 Romanians and Croats, 7 in 10 Czechs and Hungarians, as well as 5 in 10 Slovaks and Bulgarians would defend their NATO allies. However,

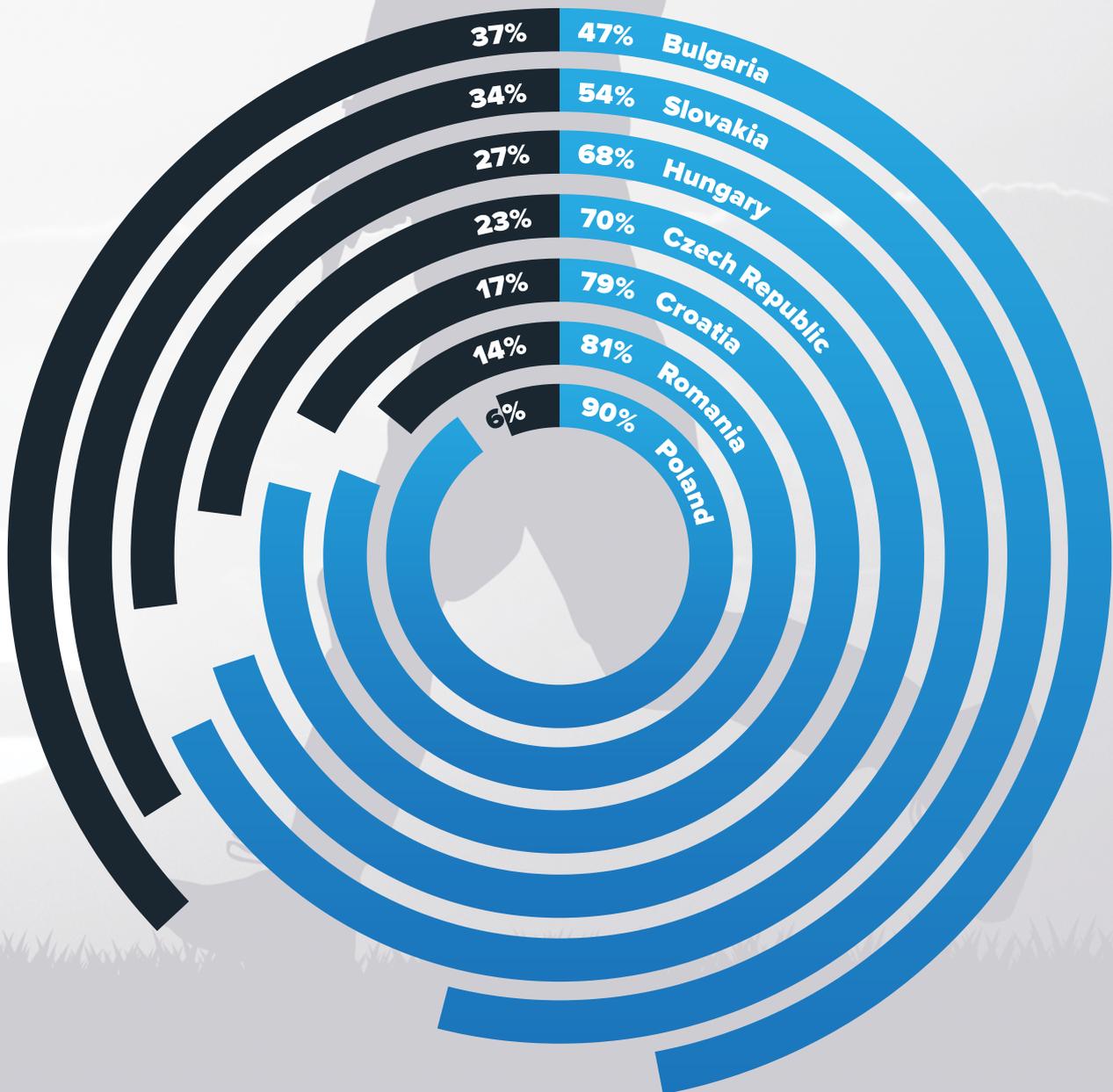
as other research carried out on the same subject by the Pew Research Center shows¹, such a high level of support could decrease significantly if a theoretical question is replaced with a realistic one. In case Russia attacked a neighbouring NATO ally, the average level of support for military action to defend the ally was only 48%.

More people see NATO membership positively, although there are huge regional differences; in some countries, the ratio of NATO supporters to opponents is 2:1 (SK), in others it is 20:1 (PL). More people in all countries would vote to remain in NATO than to leave in a referendum, although great regional differences are present as well.

Slovakia and Bulgaria are, by a great margin, the two weakest links in the NATO chain in the region. Both countries have a similar low level of support for NATO membership and almost the same share of their population (1 in 5) that would vote to leave NATO in a referendum. Despite this, the camp of NATO supporters is still twice as big (54% in BG, 43% in SK).

¹2015 Pew Research Center, June 2015, "NATO Publics blame Russia for Ukrainian Crisis, but Reluctant to Provide Military Aid," <http://www.pewresearch.org/fact-tank/2016/07/06/support-for-nato-is-widespread-among-member-nations>

Article 5 in practice: Would you help to defend your NATO allies in case of an attack?



■ We **should not** help to defend allies

■ We **should** help to defend allies

Hawks, supporters and the weak links

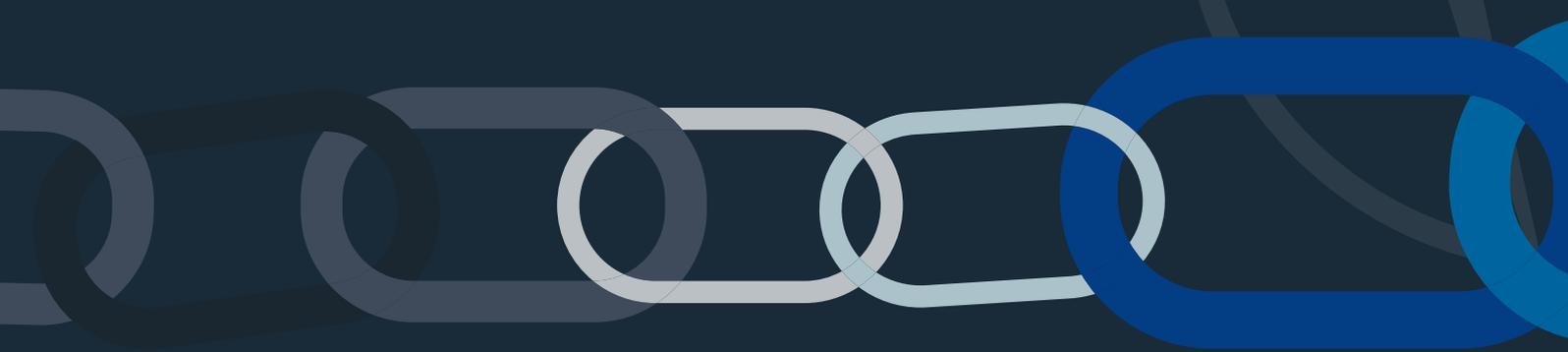
Looking at the CEE region in terms of NATO support from a broader perspective, these countries could be divided into three groups:

Lukewarm supporters (Bulgaria, Slovakia)

Understand the security provided by NATO but reject facilities, strong support for the leave camp in case of referendum

Strong NATO supporters (Romania, Poland)

Overwhelming support in all areas: membership, referendum, solidarity, installations

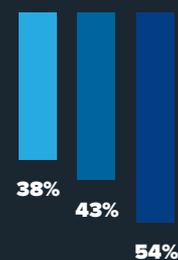


Bulgaria

Slovakia

Romania

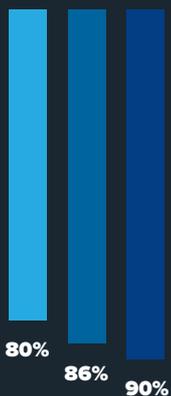
- Those who see their membership in NATO positively.
- Those who would vote to stay in NATO in a referendum.
- Those who would help to defend their NATO allies.



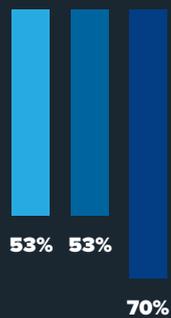
Supporters with some reservations (Czech Republic, Croatia, Hungary)

Support for membership, weak support or
rejection of facilities

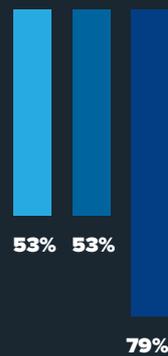
Poland



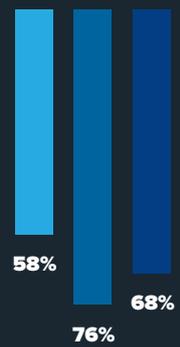
Czech Republic



Croatia



Hungary



Liberal democracy wins 7:0

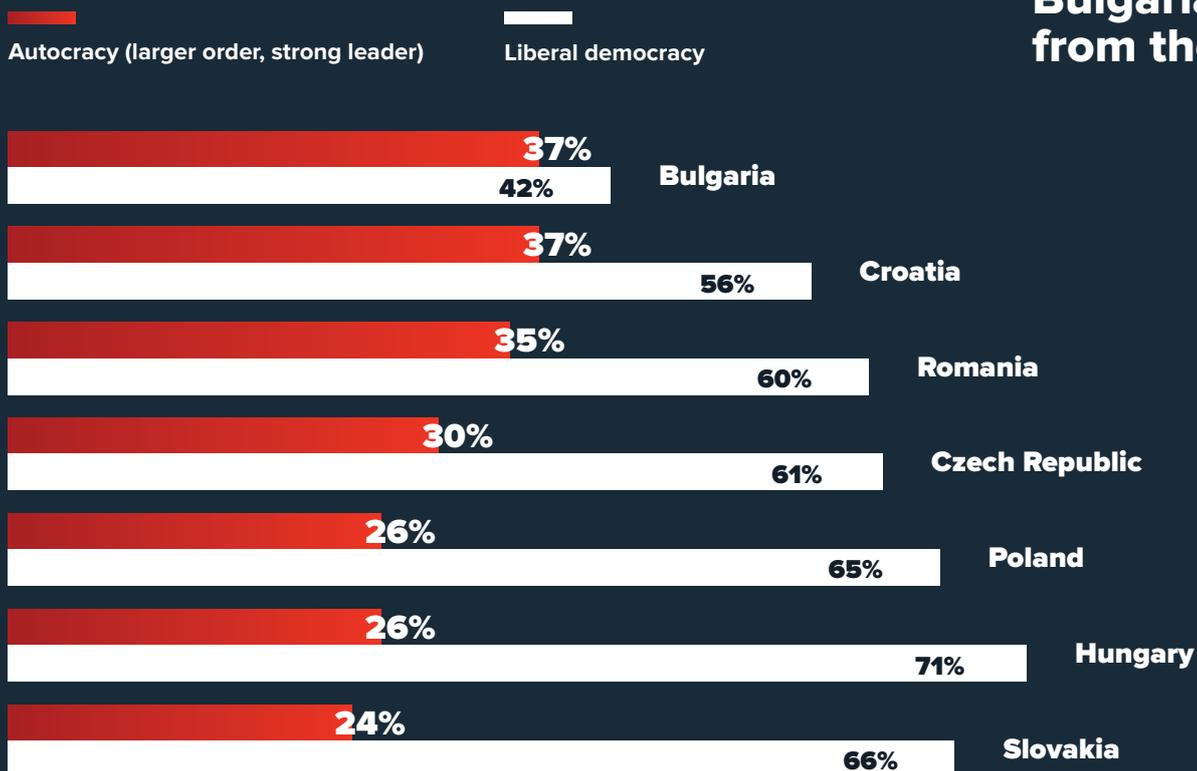
In all 7 countries more people have trust in democracy and prefer it over a strong authoritarian leader. In the Visegrad countries alone, over two-thirds of respondents support liberal democracy. This positive finding shows that citizens want to actively participate in democratic processes and decision-making in their countries. However, more than 30% of people support a strong authoritarian leader in Bulgaria, Croatia and the Czech Republic.

Democracy losing its appeal in Bulgaria

The choice between liberal democracy and authoritarian leadership is not as clear only in Bulgaria. More than 21% of respondents in Bulgaria were unable to decide what political system they would prefer for their country. Moreover, the difference between those who prefer a liberal democratic system to an authoritarian regime

is marginal—only 5%. Taking into consideration that every third Bulgarian believes disinformation and conspiracy theories and 70% of Bulgarians find Russian President Vladimir Putin likeable, this is quite an alarming finding for an EU and NATO member country.

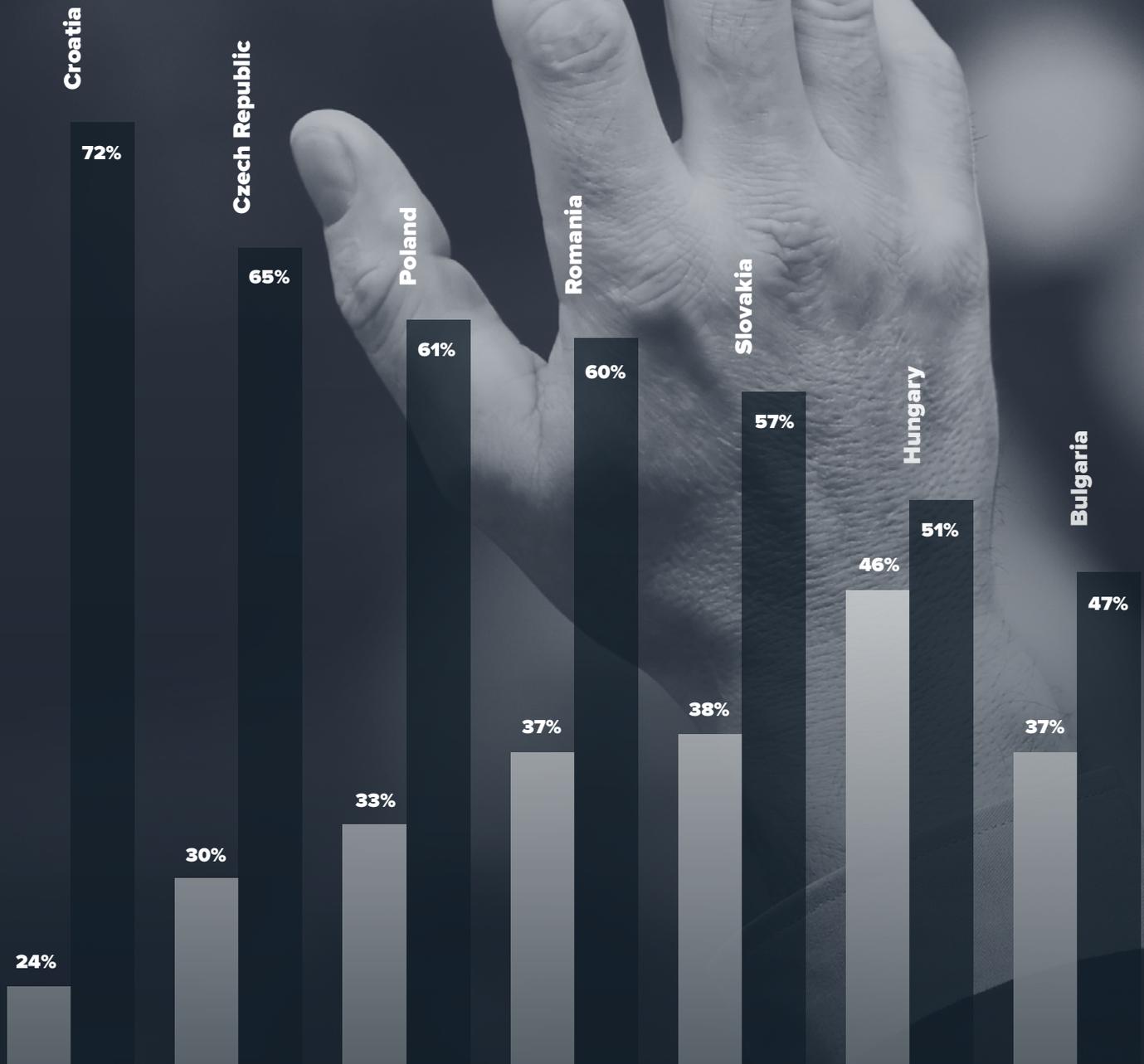
Which political system would be best for your country?



Bulgaria stands from the crowd

Should important matters be decided by elected MPs or citizens directly?

Members of Parliament Citizens in referendums



60% want more powers

On average, 60% of the adult population in the 7 CEE countries would prefer to make decisions concerning their country by referendum and direct voting. It seems that large groups of the population in every country believe citizens to be more competent and/or entitled to steer the course of their country directly rather than hand over this power to elected representatives.

Leaders: Likes & dislikes

V4 Prime Ministers

In the Visegrad countries, the popular support for Prime Ministers in their own countries is below 50%:

45 %
of Hungarians like Viktor Orbán

42 %
of Poles like Beata Szydło

42 %
of Czechs like Bohuslav Sobotka

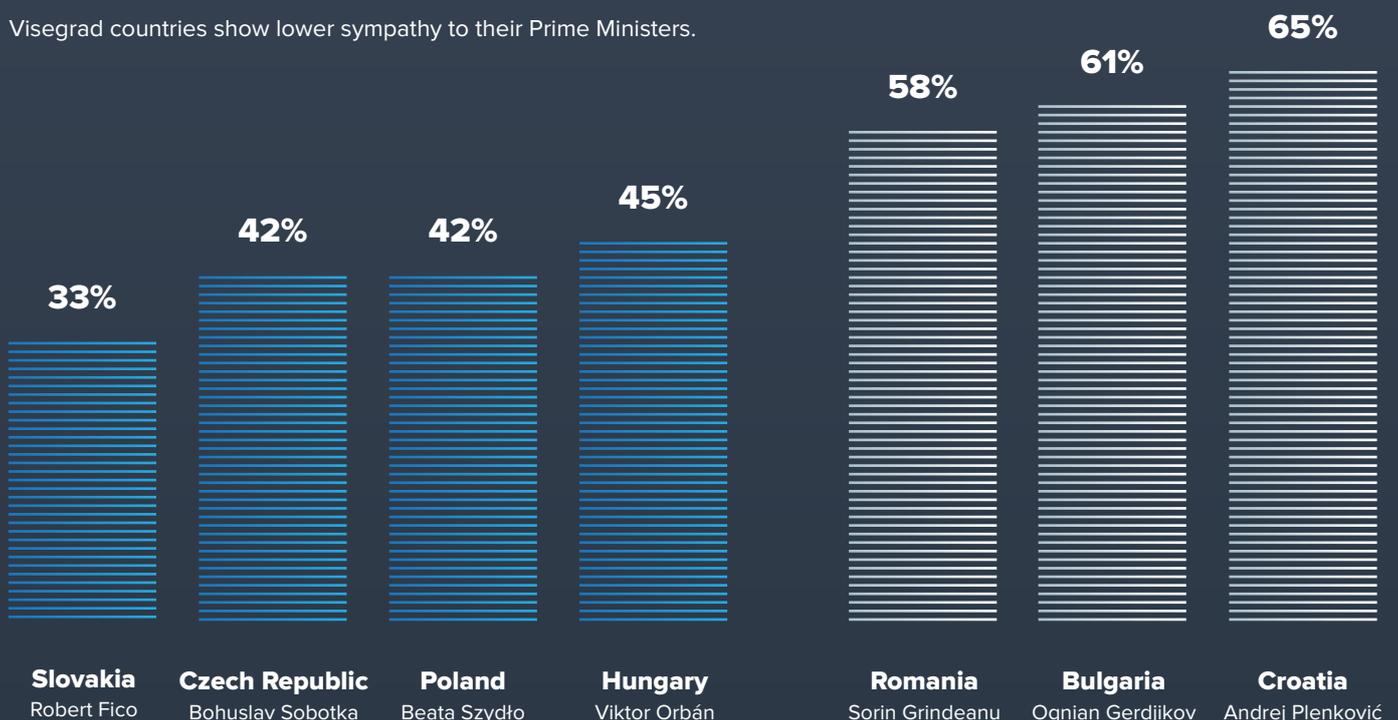
33 %
of Slovaks like Robert Fico

The Czech Republic is the only country where Prime Ministers Viktor Orbán, Róbert Fico and the President of the Czech Republic Miloš Zeman were perceived as likeable by a majority of respondents. While half of Czechs perceive Viktor Orbán to be sympathetic, almost twice as many Czechs as Slovaks (62%) perceive Róbert Fico positively.

The Czechs seem to like strong political leaders

V4 and the rest

Visegrad countries show lower sympathy to their Prime Ministers.



Angela Merkel perceived more negatively than Vladimir Putin

In 4 out of the 7 countries, the majority of respondents did not like Angela Merkel. In the Czech Republic, Hungary, Slovakia and Bulgaria, Angela Merkel was even perceived more negatively than Vladimir Putin.

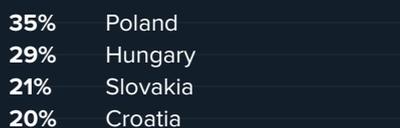
Central Europeans do not have much sympathies for Donald Trump

The new president of the United States does not receive a lot of sympathy in the CEE. The majority of people in all the analysed countries do not like Donald Trump, with Slovakia, Croatia and the Czech Republic leading the group. In fact, every seventh Slovak and Croat has negative views of Donald Trump.

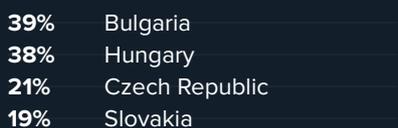
Sympathies of respondents towards foreign leaders



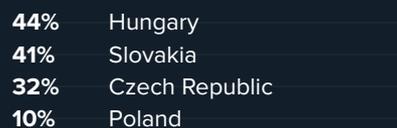
Donald Trump



Angela Merkel



Vladimir Putin



Fake news: 10 million people under the spell

Widespread distrust of media

Belief that reality is usually different than what media try to tell us is held by:

68% of Poles

63% of Croats

57% of Romanians

Almost 10% of people in the CEE trust online disinformation outlets as relevant sources of information on world affairs. In Romania, 30% of respondents considered disinformation websites to be a relevant source of information.

Only in Hungary and Slovakia did the majority of people believe that all necessary information is available

and provided by mainstream media. Slovakia, at 53%, had the highest trust in information provided by mainstream media of all the analysed countries.

In the Czech Republic, most respondents do not believe that mainstream media provide an accurate picture of world affairs. This is an interesting finding considering there

are several Czech organisations actively debunking false information.

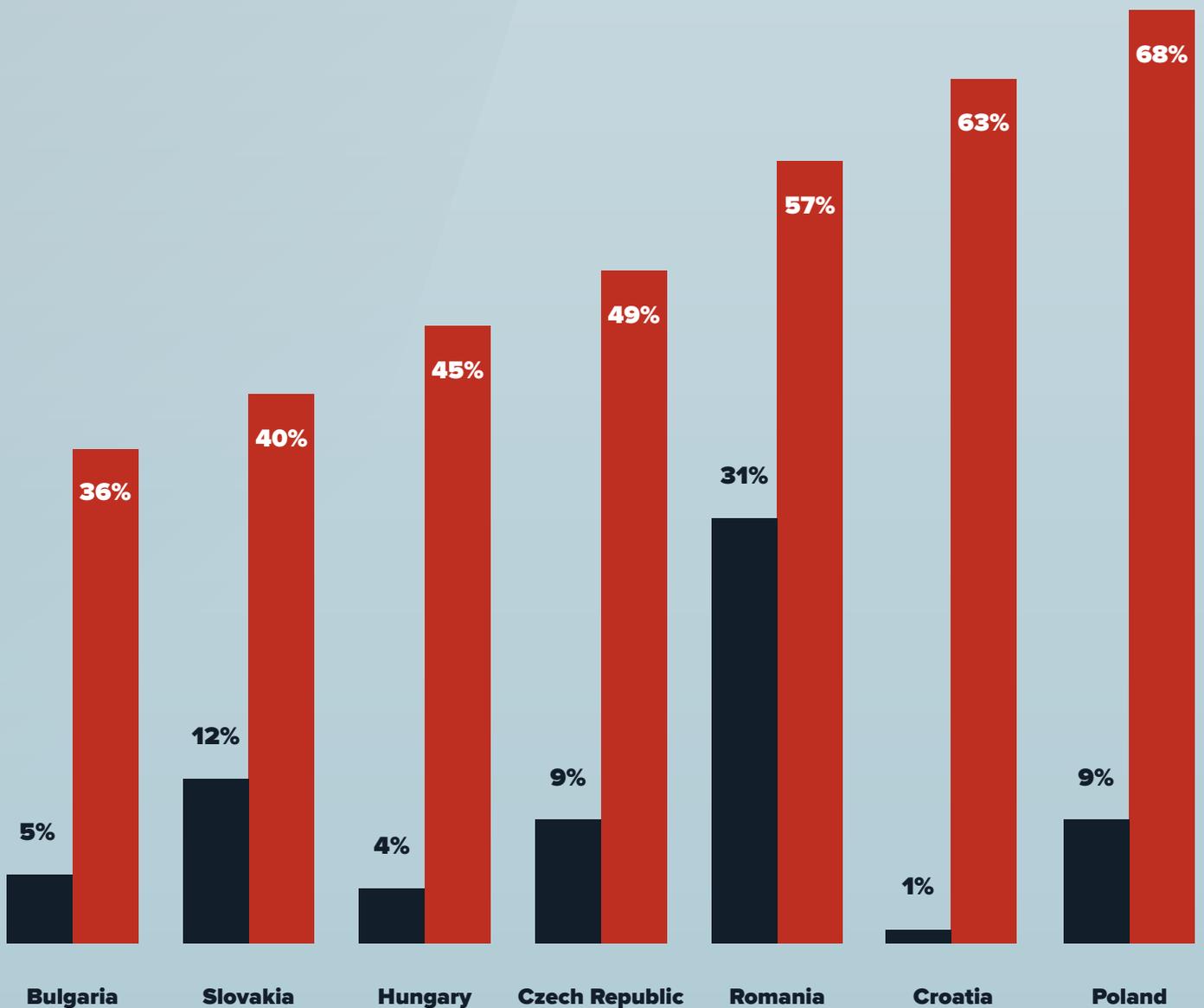
Bulgaria has the highest percentage of undecided people. Over 20% of respondents do not know whether they are objectively informed by media on world affairs or whether certain issues are hidden from ordinary people.



Media: distrust & disinformation

Respondents consider online disinformation websites as relevant source of information

Respondents who do not believe the mainstream media



Internet & social media: Blessing or menace?

High internet penetration in CEE

In all 7 countries, internet penetration is above 50% and ranges from 88% in the Czech Republic to 58% in Romania.² In 5 out of the 7 countries, the majority of respondents use the internet on a daily or almost daily basis. The exceptions are Bulgaria, with 49%, and Romania, with 42%, of respondents who use the internet daily, but these countries also have the lowest internet penetration among the analysed countries.³

In only 3 out of the 7 countries did a majority of respondents declare they actively search for information about political events online. Furthermore, of these, in 5 out of the 7 countries, the majority get their information on domestic and foreign affairs from their favourite websites. Interestingly, in Bulgaria and Romania, the majority of people use social media to stay informed about world affairs.

Internet driving erosion of trust?

Alarming is the result of a comparison of respondents who actively search for information on political events and those who do not believe mainstream media. While in the Czech Republic, Hungary and Bulgaria the numbers are almost similar, in Slovakia only 28% of respondents search for information on political events online, but 40% of Slovaks do not believe media provide a true picture of reality. The outlier is Poland, where 75% of respondents actively use the internet to search for information on political events and 68% do not trust media. Furthermore, having access to the internet and using it daily does not necessarily increase the public's level of trust as such. This conclusion is confirmed by other research on the subject, such as the Edelman Trust Barometer⁴, which indicates that trust in online sources has risen while for traditional media, it

has fallen. However, active use of the internet is not reflected in increased trust in the society. Quite the contrary, trust in institutions, governments, media, NGOs and businesses has fallen across the world despite the increased number of active users of the internet.

Huge differences in the CEE on the youth and politics: 90% of Poles search online for information on politics vs only 23% of Czechs.

² Internet Live Stats, "Internet Users by Country in 2016." More information available at: www.internetlivestats.com/internet-users-by-country

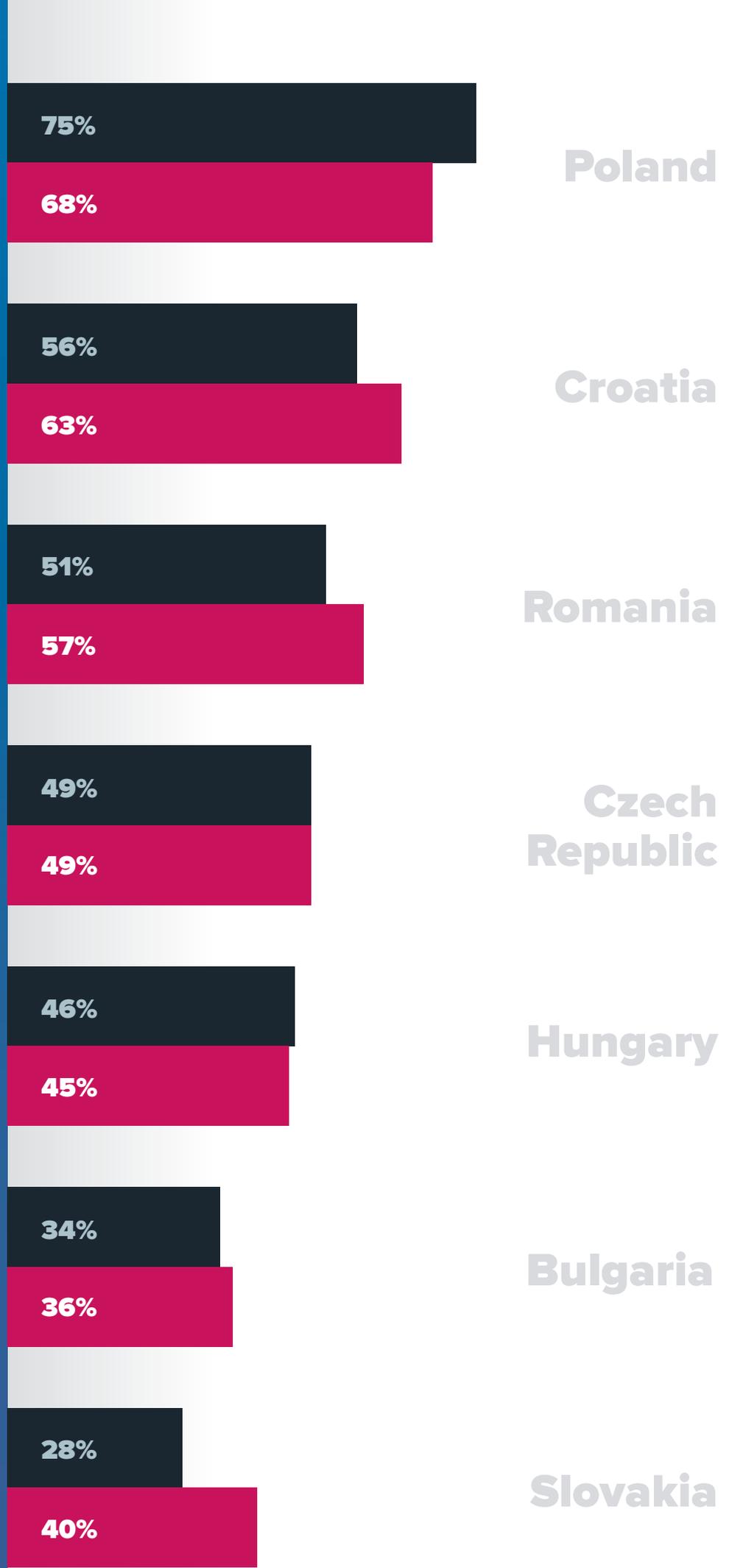
³ Eurostat, "Internet access and use statistics—households and individuals." More information available at: http://ec.europa.eu/eurostat/statistics-explained/index.php/Internet_access_and_use_statistics_-_households_and_individuals

⁴ 2017 Edelman Trust Barometer, www.edelman.com/trust2017

Interested but mistrustful

■ People who **actively search** for information on political events

■ People who **do not believe** in information provided by media





Connecting the dots

01

We are all in the same boat

The main conclusion of the analysis of the trends and attitudes of people in the CEE region is that despite their diversity and differences, the great majority of people in this region share the same priorities as their EU counterparts and NATO allies. They regard both institutional frameworks to be anchors in a stormy sea of uncertainty.

02

History, culture and economy shape CEE geopolitical preferences

The historical experience of the 20th century and turbulent relationship of the CEE countries with the Great Powers explain why many people in the region prefer not to side, at least consciously, with the West but prefer a middle geopolitical position. The consequences of 50 years of communism and military and economic alliance with the Soviet Union continue to shape people's attitudes even after almost 30 years since the fall of the Iron Curtain. However, when asked specifically, Central and East Europeans understand the importance and benefits of EU and NATO, at least for now.

03

Overwhelming popular support for the EU

Despite all the noise and political rhetoric about the "dictate from

Brussels" and the future of the EU coming from Central and Eastern Europe, the overall message is positive. People of this region overwhelmingly want to remain in the EU and a great majority would vote to remain if a referendum on the EU were to be held. There are certain elements of EU policies and decision-making processes which draw a lot of criticism, but most people realise there is no realistic alternative to EU membership. The challenge is to predict how much the current mood would change after 2020, when most of the EU funds driving public investment and development projects dry up.

04

NATO security guarantee more important than ever

Because of Russia's direct involvement in Donbas and the raging civil war in Syria, along with ongoing situation with ISIS, the security situation in the CEE region has changed dramatically. In such circumstances, the importance of NATO as a security guarantee and safety has increased and people of the region clearly realise this.

05

External and internal forces pushing some countries out of NATO

At the same time, some CEE countries have become battlefields in the information war and are targeted by hybrid warfare. External forces, in cooperation with a network of domestic actors, try to undermine support for EU and NATO membership in various countries using slogans of "independence" and "make peace not war" or "Slavic brotherhood" in a thinly

veiled attempt to veer their audiences away from support for the trans-Atlantic security architecture. Interestingly, such attempts mostly target the weakest links in the NATO chain in the region, confirming a coordinated and well-organised operation.

06

Liberal democracy still has its appeal

There is not much appetite for strongmen or authoritarian rule in the CEE, yet people in most countries feel they are not represented by their parliamentarians and desire more direct decision-making over the course of their countries. On one hand, it is a positive signal that people want to shape their future directly and take responsibility, but on the other hand, it is a sign of growing unease with the political establishment. Such popular sentiments are already channelled into support for autocratic or un-democratic political parties, using this desire and promising "referendum democracy" with all its dangers and challenges.

07

Erosion of trust affects us too

The global trend of erosion of trust in institutions, government, media, NGOs and businesses is taking its toll in this region as well. People do not believe media, but in search of the "truth behind the curtain", many end up in a web of conspiracy and well-organised disinformation campaigns. High internet penetration is not helping the situation either, since little effort is made in the region to increase barriers to manipulation by investing in media literacy or critical thinking—crucial skills in the 21st century.

Credits

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Opinion polls conducted by:

ESTAT Ltd. in Bulgaria
Ipsos d.o.o. in Croatia
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TNS Hoffmann in Hungary
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IPSOS S.R.L. in Romania
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