

GLOBSEC Trends

2021



COVID-19



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Central & Eastern
Europe one year into
the pandemic

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For full credits and methodology, please [SEE PAGE 78](#)

Foreword

Does Central Europe still exist? Is there Central European public opinion?



Against a backdrop where many are contemplating the identity of Central Europe, including whether one distinct regional populace exists at all, the GLOBSEC Trends Report of 2021 underlines the fact that the region appears more homogeneous from the outside than from within. External perspectives indeed often overlook important cultural, political and economic differences and overly emphasise the shared communist past of the region. The distinctions between countries, however, are significant. The Czech Republic, by way of illustration, ranks as one of the most secular places in Europe even as Poland remains one of the most religious countries on the continent. The region is economically and historically diverse too.

Notwithstanding these differences, the Central and Eastern European region is not without any shared identity. According to the survey, a majority, for example, are uncomfortable merely aligning with the West, with the region instead seeking to carve out a unique niche. The notion that the region is to serve as a bridge between the East and West is not new. And even though it may not be reassuring or inspiring, populaces in the region are content with pursuing this role at the moment.

This “bridge” identity, at least partially, explains CEE’s complicated relationship towards key Western institutions. Although membership in the EU and/or NATO remains undisputed, CEE still perceives these institutions as external entities. Societies believe it is in their interest to stick to these organisations but refrain from seeking ownership of the house (a rental rather appears to suffice). But a tenant mentality risks becoming a problem if the West and East (Russia and China) engage in fierce competition, a development that appears all the more likely.

The survey findings entail that Central Europeans live in a world that sees them place Russia as far to the East as the eye can see and the United States, conversely, to the far West. China, meanwhile, finds itself left off the map entirely. But it is, however, no longer a small world after all. Geopolitical confrontation between the United States and China, in fact, can be

expected to considerably shape the future.

It is not difficult to conclude that both liberals and illiberals appear to be living in the world of yesterday. Liberals have been late to take note that societies have simultaneously experienced the pandemic as nationalist and European moments. Populations, furthermore, are not divided primarily around the pro and anti-European axes that some imagine to be in place. To be pro-European is not enough – societies rather expect their governments to be effective in defending what they see as the national interest. Illiberals, for their part, have neglected that even nationalists recognise the importance of the EU for preserving the relevance of Europe in global politics. Brussels is not the enemy anymore - even for nationalists.

The most alarming finding from the survey concerns the erosion of trust in democratic institutions wrought by the pandemic. Democratic governance has become synonymous with the management of mistrust. These “viruses” of our societies - mistrust and conspiracy thinking – brought on by the pandemic could ultimately exert more deleterious effects than COVID-19 itself.

In seeking to adapt to the world we are entering, our political and business leaders must be aware that Central European societies are emerging disoriented and confused from the pandemic. It is not merely that we lack answers but it is also uncertain if we are asking ourselves the right questions. To be a tenant of the West, in other words, creates its own vulnerabilities.

Ivan Krastev

Chairman, Centre for Liberal Studies, Sofia
Permanent fellow at the Institute for Human Sciences, Vienna

Key findings

The COVID-19 pandemic and its ramifications continue to reverberate across Central and Eastern Europe, influencing public attitudes on geopolitical topics, world leaders (such as perceptions of friends and foes) and support for democracy.

Our research shows that societies value stability and credible sources during crises. As vaccination campaigns ramp up and Central and Eastern European societies gradually return to pre-COVID-19 routines, this report takes stock of the pandemic and its implications on public trust and attitudes on pressing issues. Key highlights from the survey include:

1

Germany – a beacon of stability in a time of distress

Against the backdrop of pandemic-fuelled uncertainty, Germany has emerged as the most important strategic partner in the region according to 57% of respondents. Berlin is followed at a distance by Washington (35%) and Moscow (23%). Apart from Poland and Romania, where the US was more preferred, Germany was the most commonly selected strategic partner in every surveyed country.

2

EU and NATO remain overwhelmingly popular across the CEE region

Support for EU membership, favoured by 78% of respondents on average across the region, remains resolute. Attitudes towards NATO membership are also largely positive, with 73% of respondents, on average, affirming their backing.

3

China's human rights violations are on the radar in CEE

More than 50% of respondents in every surveyed country, apart from Bulgaria, believe that human rights are being systematically violated in China.

4

Russian and Chinese vaccine diplomacy efforts fail to garner public support

Russian and Chinese vaccine diplomacy has been met with only limited success, with merely 5% of people in the region expressing a preference for the Sputnik V vaccine over alternatives and less than 1% for Chinese vaccines like Sinovac.

5

While the willingness of people to get vaccinated has increased, some COVID-19 conspiracy theories still persist

Acceptance of the narrative asserting that public authorities are overestimating the number of COVID-19 cases amounts to at least 20% of the population in every surveyed country.

6

National governments perceived as incompetent

In 8 of 10 countries, a majority of respondents judge their governments to have handled the pandemic badly. The dissatisfaction has risen in most countries since our poll in October 2020.

7

Trust in medical and scientific authorities underpins vaccine interest

Whereas only 53% of CEE respondents, on average, are interested in getting the COVID-19 jab, this figure grows to 63% among those who trust leading medical experts and scientists.

8

Democracy trumps authoritarianism - for now

A total of 8 in 10 people in the region consider democracy – defined as a system based on equality, human rights and freedoms and rule of law – to be good for their respective countries. Yet support for autocratic governance has increased in five countries and boasts a notable 42% average favourability score in the region.

9

Democracy does not equate to liberal democracy

The identification of democracy as an ideal governance system has plummeted by 15 percentage points and seen its buy-in fade in 9 of 10 surveyed countries when the word “liberal” is added before democracy. This reflects a significant backlash against liberalism as a term in many parts of the region.

10

Support for more stringent social media regulations gains momentum in CEE

More than 50% of respondents in 7 out of 10 countries agree that social media should be more strictly regulated, yet considerable differences between countries are present.

Country highlights

Austria



WEST

COVID-19 vaccination potential highest in Austria

Vaccine interest potential, among surveyed countries, is greatest in Austria (81%), with **the vast majority either already received the jab or planning to get vaccinated**. This willingness to get vaccinated can be attributed, in part, to the relatively robust trust that Austrians express towards medical authorities and pharmaceutical companies.

Of all surveyed countries, **US President Joe Biden is the most popular in Austria**, with 76% perceiving him positively.

Austria also has a strong awareness of human rights violations in China, with **90% of respondents believing that human rights are being systematically violated** there.

The regulation of digital platforms is gaining traction in Austria, with nearly three quarters of the population backing more stringent regulations on social media companies like Facebook, Instagram and YouTube.

Estonia



BALTICS

Estonia indicates greatest level of trust in mainstream media

Estonia enjoys the distinction of being the only surveyed country classified as home to a good media environment, according to the World Press Freedom Index. The GLOBSEC Trends survey confirmed this finding, with **Estonia being one of only two countries in the region experiencing an increase in media trust** (now at 62%) in 2021.

Alongside Poland and Lithuania, respondents in Estonia affiliate themselves, geopolitically, most closely to the West (44% believe Estonia should be part of the West).

49% of respondents in Estonia perceive **the US as the most important strategic partner** for the country, with 52% rating US President Joe Biden favourably.

Estonians are the second least likely, following Austria, to fall victim to conspiracy theories concerning COVID-19, with **only 16% in Estonia, on average, accepting these narratives¹**.

Latvia



BALTICS

Latvia supportive of the EU but unfamiliar with Ursula von der Leyen

Respondents in Latvia are among the most ardent proponents of EU membership, with 84% expressing their support for remaining in the bloc. Yet 41% of respondents in the country are unable to express an opinion regarding Ursula von der Leyen.

There is also a rather low level of awareness concerning China in Latvia - **23% are undecided on whether the Chinese regime could be an inspiration for their country**.

Respondents in Latvia are most inclined, among Baltic countries, **to believe conspiracy theories concerning COVID-19**.

A majority in Latvia, in addition to Bulgaria and Romania, **believe that having a strong and decisive leader who need not bother with parliament or elections is good for their country**.

Lithuania



BALTICS

Lithuania exhibits most pronounced pro-Western leanings in region

Despite robust support for EU membership, **only 31% of Lithuanians**, the least in the region, **believe the EU should be responsible for negotiating COVID-19 vaccine purchases**.

Lithuania is the most strident proponent of a Western geopolitical orientation in the region, with **47% preferring to position their country in the West**.

European leaders are popular in Lithuania - Angela Merkel is viewed positively by 72% of respondents, Emmanuel Macron by 61% and Ursula von der Leyen by 52%.

Lithuanians, however, are relatively sceptical of democracy, with **only 70% agreeing that democracy is a good system for their country**, the lowest in the region.

 **Czechia**

VISEGRAD FOUR

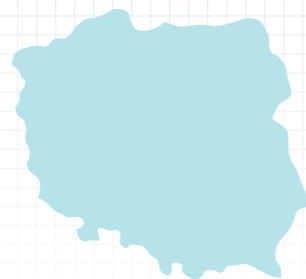
Authoritarian leadership has little appeal in Czechia

Among surveyed countries, Czechia has the least appetite for authoritarian governance, with **only 27% agreeing that having a strong and decisive leader** who need not bother with parliament or elections **is good for their country**.

Though a sizeable majority of Czechs, 66%, back EU membership, **the country is, nevertheless, the most Eurosceptic member state in the survey group**.

Czech respondents are particularly wary of Beijing's growing influence, with **87% disagreeing that the Chinese regime could be an inspiration** to Czechia.

Distrust towards mainstream media is very high in Czechia, as **64% of adult respondents distrust media, which represents an increase of five percentage points from 2020**.

 **Poland**

VISEGRAD FOUR

Poland remains pro-Western but trust crumbles

Poles rank as the most fervent proponents of a Western geopolitical orientation in the region (46%) and similarly **most prioritise strategic partnership with the US (54%)**.

These pro-Washington leanings are reflected in Polish attitudes towards Moscow and Beijing. **Only 12% perceive Vladimir Putin favourably, with 75% believing Alexei Navalny should not have been imprisoned following his poisoning**. Only 8%, meanwhile, consider China to be a role model.

89% of Poles would vote to remain in NATO if a referendum were to occur, reinforcing Poland's long-standing vehement backing of the organisation.

Poles are also least inclined towards believing COVID-19 related conspiracy theories among V4 countries but express the lowest levels of trust in medical authorities (66%) and pharmaceutical companies that produce the vaccines (52%).

 **Hungary**

VISEGRAD FOUR

Mainstream media distrust sharpest in Hungary

Mainstream media distrust, among the survey group, is greatest in Hungary, **having increased substantially from 55% to 69%** over the past year.

30% of Hungarians are inclined to identify China as a strategic partner – also the most in the region.

Hungarian **support for liberal democracy, measured at 59%**, fares second worst among surveyed countries. **If “liberal” is omitted from democracy, however, democracy backing rises to 85%**.

A total of **54% of Hungarians believe their government handled the COVID-19 pandemic well** by the time of the survey. Hungary is one of only two countries, alongside Austria, where majority of respondents positively evaluate their government in this respect.

 **Slovakia**

VISEGRAD FOUR

Slovakia, a place of paradoxes

Slovakia holds the distinction of being the only country in the region to record **rising support for a pro-Western orientation, including EU and NATO membership**, since 2017.

Moscow still gains a sympathetic audience among Slovaks though, with **47% identifying Russia as a strategic partner and 55% perceiving Vladimir Putin positively**.

Though **75% of respondents judge the Slovak government to have handled the COVID-19 pandemic badly**, 68%, the most in the region, believe it should be tasked with vaccine procurement negotiations rather than the EU.

And while **19% of Slovak respondents believe that Chinese regime could be an inspiration for their country**, **88% consider democracy** based on equality, human rights and freedoms and rule of law **to be a good system for their country**.

 **Bulgaria**

BLACK SEA

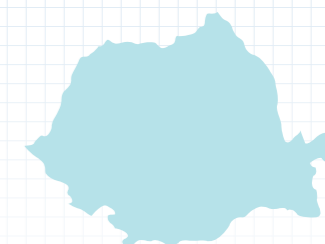
Vladimir Putin most popular in Bulgaria

A total of **70% of respondents in Bulgaria perceive Vladimir Putin favourably**, the highest share by far, in the survey group.

62% of Bulgarians also believe that a strong autocratic leader could be good for their country – also the most in the region.

Awareness of human rights violations in China is muted in Bulgaria, evidenced by only **35% of respondents agreeing that Beijing is committing systemic human rights violations**, lowest among surveyed countries.

COVID-19 conspiracy theory buy-in, meanwhile, is prevalent throughout Bulgaria – **17% of respondents agree with the assertion that the virus is fake and over 40% think that the pandemic was an operation planned by hidden forces** and that its government is overestimating the number of COVID-19 cases.

 **Romania**

BLACK SEA

COVID-19 scepticism remains widespread across Romania

Romania also finds itself among the most pro-Western countries in the region, reflected in the population's robust backing for a Western geopolitical orientation (43%), identification of the US as a strategic partner (47%) and favourable opinions of Joe Biden (58%).

That said, **30% of Romanians**, the greatest share in the region, also **recognise China as a source of inspiration for their country**.

Support for NATO membership remains robust (77%), but the willingness to leave the bloc has increased from 6% in 2017 to 19% in 2021.

Romanians, meanwhile, rank as the greatest COVID-19 sceptics, with 30% believing that COVID-19 is a fake and 47% inclined to think that authorities are overreporting COVID-19 case numbers. The survey findings further indicate low levels of vaccine interest in the country and muted trust of scientific authorities (40%) and pharmaceutical companies.

East-West



The Central and Eastern European aspiration to “be like the West” has lost its allure and is not so important anymore according to years of GLOBSEC Trends polling². While the West, with its higher wages and living standards, is still seen as economically superior, Central and Eastern European societies are generally inclined towards maintaining their own identities. As data from the region (including Austria) underscores, these countries are embracing what can be labelled as a “Central-Western” approach, which should rather be understood as a necessity to define one’s own path and overcome socio-historical complexes concerning great power domination that still resonate for many.

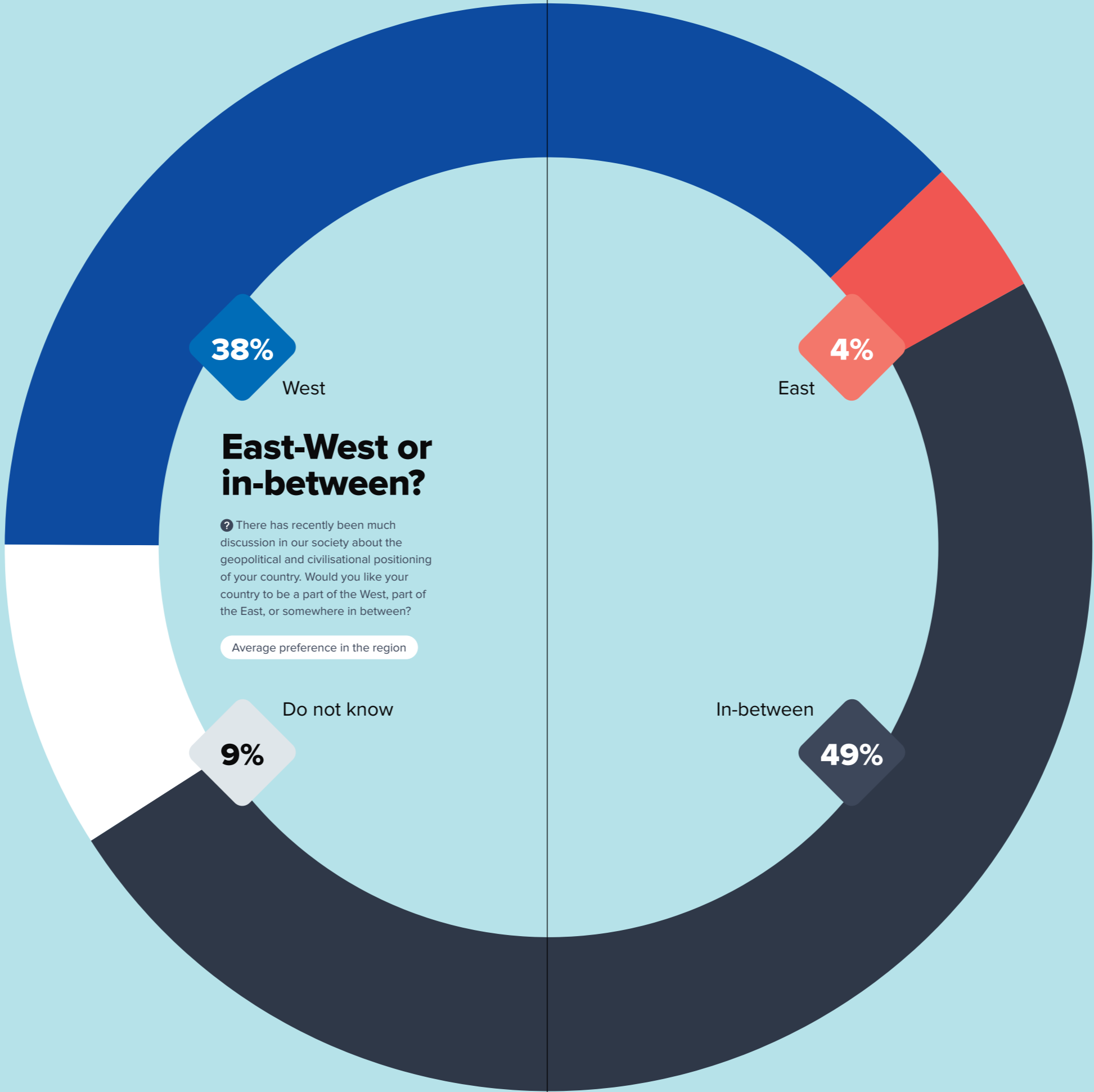
Strong similarities

Despite significant differences in their perceptions of world powers, **SEE PAGE 18** the ten surveyed countries are rather similar in their attitudes towards the geopolitical orientation of their countries (the East, the West or somewhere in-between), with a positioning between East and West favoured in most countries. Outliers include Estonia, Lithuania and Poland – majorities in these countries back a Western geopolitical orientation (though 18% of respondents in Estonia were uncertain).

Bulgaria and Slovakia, home to the most fervent pro-Russian sentiment in the region, exhibit the greatest support for an Eastern geopolitical orientation - but even then at only 11-12%.

Preference for the West

- Lithuania **47%**
- Poland **46%**
- Estonia **44%**
- Romania **43%**
- Austria **40%**
- Latvia **39%**
- Czechia **33%**
- Hungary **32%**
- Bulgaria **27%**
- Slovakia **26%**



More than 50%

of respondents prefer the in-between position in Austria, Bulgaria, Czechia, Hungary, Latvia and Slovakia.



“The in-between position is a popular stance promoted by local oligarchs, businesses and occasionally even politicians who profit from trade or close ties with Russia. They argue that Latvia should be a ‘bridge between the East and the West’ and emphasise economic benefits from good relations and trade with Russia.”

Riga Graduate School of Law, Latvia



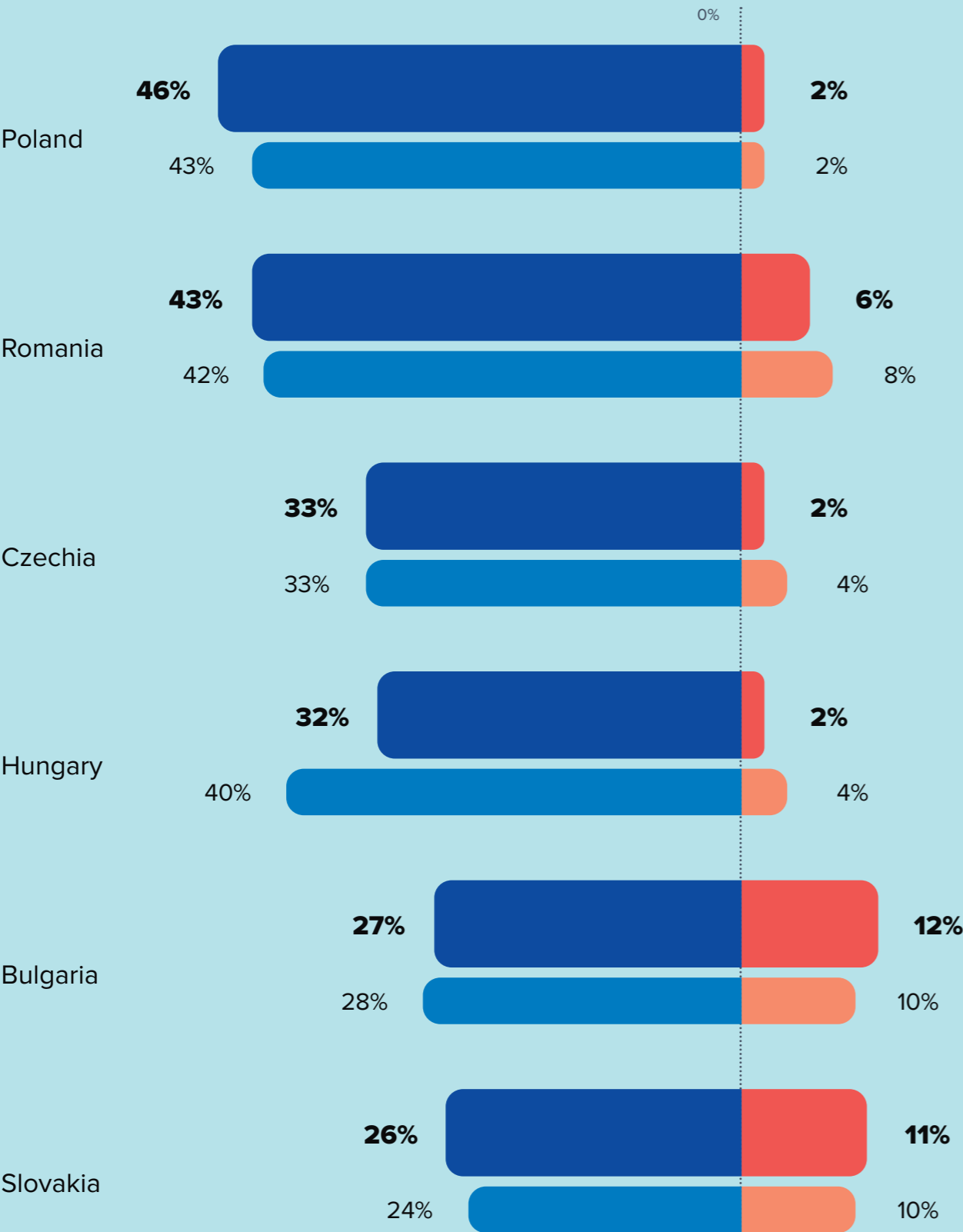
“Austrian neutrality (established in 1955) is deeply rooted and has nearly become a part of national identity. Although in real politics, the concept has changed due to membership in the EU, political parties aiming to secure votes shy away from putting this matter up for discussion.”

Austrian Society for European Politics (OGfE)

Changes in preferences compared to previous years

There has recently been much discussion in our society about the geopolitical and civilisational positioning of your country. Would you like your country to be part of the West, part of the East, or somewhere in between?

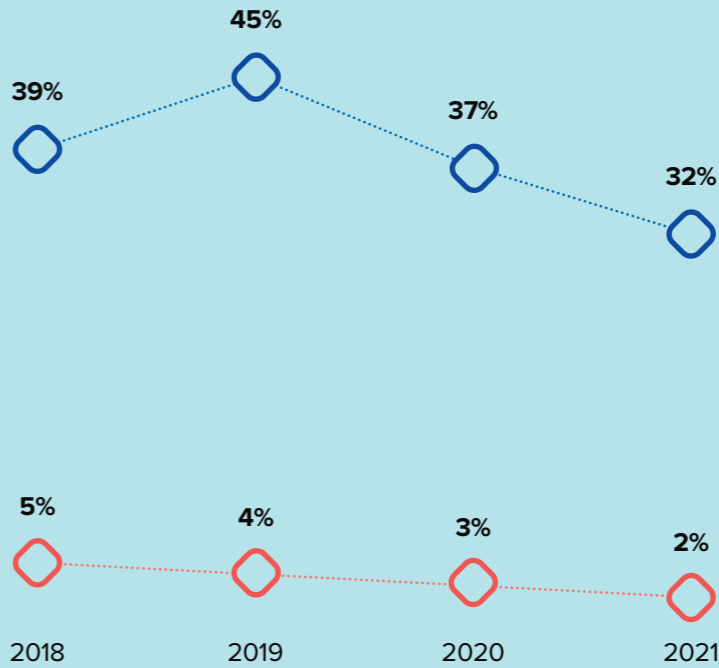
- Those who preferred West, 2021
- Those who preferred East, 2021
- Those who preferred West, average between 2017-2020
- Those who preferred East, average between 2017-2020



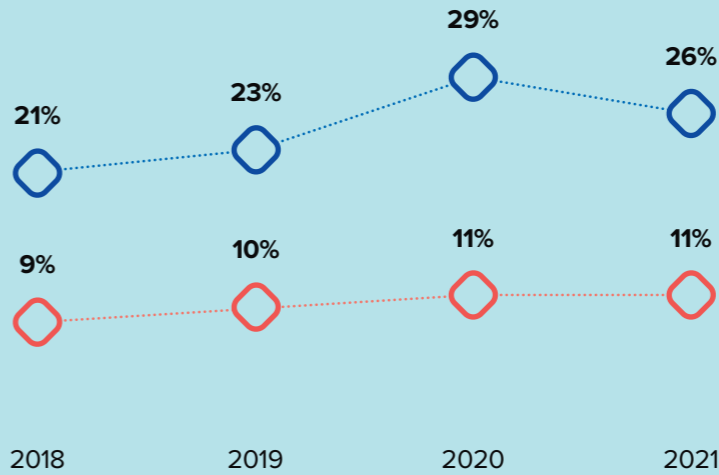
Changes in geopolitical preferences over four-year period

- Those who preferred West
- Those who preferred East

Hungary



Slovakia



Western Trends

With few exceptions, long-term data indicate that geopolitical preferences - Western or Eastern - are rather stable. Two patterns are discernible from the longitudinal data in Hungary and Slovakia. Whereas preferences for a Western orientation have increased slightly in Slovakia since 2017, there has, conversely, been a slight decline in Western dispositions in Hungary.

In Hungary, respondents are gradually moving towards rather preferring the “in-between” position than the West.

Superpowers



While the very idea of superpowers is now debated, the economic, military and strategic power of the US, China and Russia maintain a domineering role in shaping global politics. As the competition for influence and dominance among the three superpowers intensifies, countries situated on the eastern flank of the EU and NATO are finding they are crossroads where the East and West collide.

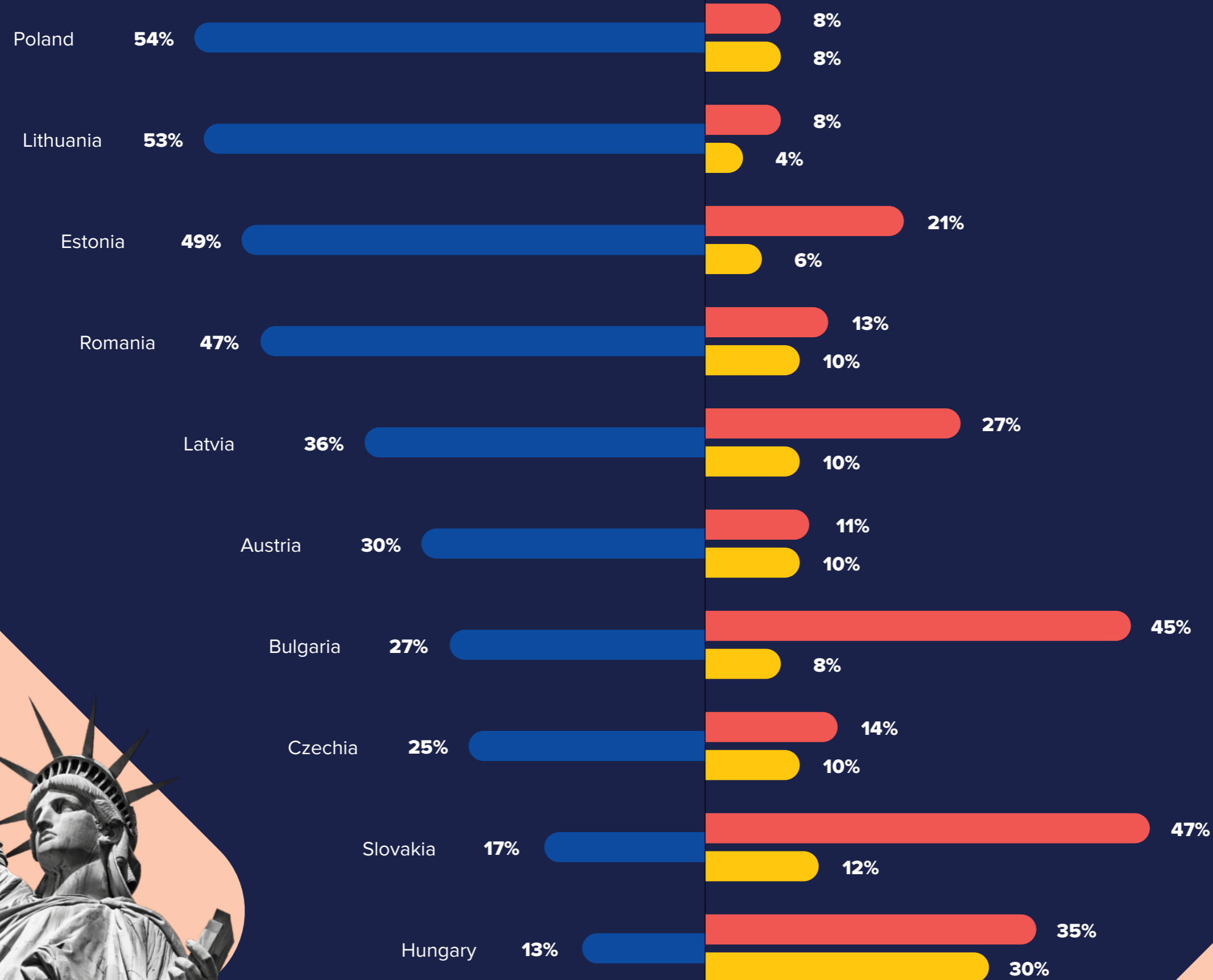
The COVID-19 pandemic, meanwhile, presented an opportune moment to dismantle the US-led world order. While the US was recovering from the ramifications of the pandemic, Russia and China indeed exploited every opportunity to increase their standing in the region.

The latest public attitudes towards different strategic partnerships (the US, China and Russia), in particular, underline the political success of recent Russian and Chinese vaccine diplomacy endeavours.

2 Superpowers – strategic partners

Which of the following countries are the most important strategic partners of your country today? Pick max. 2. (respondents could choose from a randomised selection of 6 countries including the US, Russia, China, Germany, France and the UK)

The US Russia China



Hungary the outlier

The survey indicates that Hungary stands out from its peer group, with its public more inclined to classify Russia and China as strategic partners. This finding comes following the country's approval of Russian Sputnik V (Hungary was the first in the EU to take this move) and the Chinese-developed Sinovac vaccine (Hungary remains, at the time of writing, the only EU country to administer it). Hence the high preference for China and Russia is a reflection of the dominant political discourse in Hungary, praising Russian and Chinese vaccines³. It is, nevertheless, intriguing that younger Hungarians are more likely to label Russia a strategic partner. In Bulgaria and Slovakia, meanwhile, this view is most espoused by the oldest sub-groups.

Joe Biden more popular than the US

Though states tend to be viewed through the prism of their leaders, public attitudes of the top political figure in each of the three “superpower” countries are, notably, markedly different than views towards strategic partnership more generally with respect to each country.

The favourability ratings of all three leaders surpass the percentage identifying their respective countries as strategic partners. This discrepancy, as it pertains to President Biden and the US, is most striking in Austria (46%), Czechia (38%), Hungary (29%) and Slovakia (39%), with Joe Biden viewed in a considerably more positive light than the country he represents.

The case of Vladimir Putin is also quite telling. He is viewed, not unexpectedly, most favourably in Bulgaria and Slovakia. The placement of Hungary and Romania, respectively, in third and fourth, however, is notable. This finding contrasts with the robust support for NATO and/or a pro-Western orientation in the two countries.



“While anti-Russian sentiments are widely documented and prevalent throughout Romania, there are voices that directly or indirectly praise the country and specifically its leadership. Putin is perhaps perceived as a man of action, a true patriot, and a great leader by a sizeable share of the public. These are all qualities that make a true statesman, according to public opinion. Let us not forget that Russia invests a great deal in strategies aimed at bolstering its image and soft power in the region.”

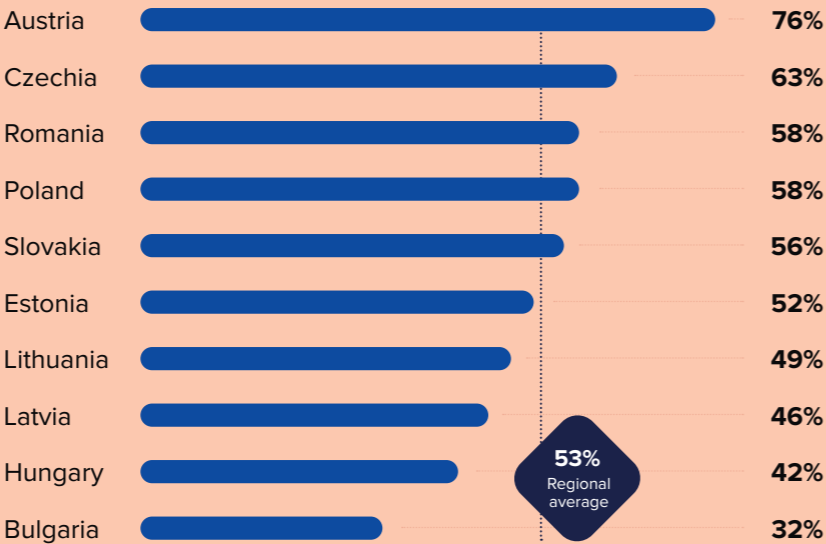
Funky Citizens, Romania

Have you previously heard about the following leaders and if yes, do you perceive them positively or negatively?

Share of those who view a particular world leader positively.

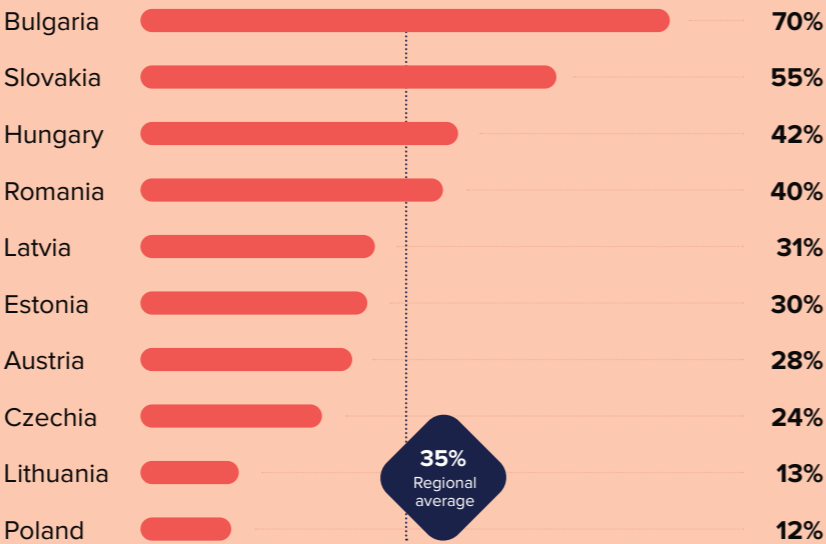


Joe Biden, president of the USA



Vladimir Putin, president of Russia

Vladimir Putin’s image remained largely stable over the past four years in CEE. Slovakia is an exception to this trend, since the public approval of Kremlin leader has increased by 14%.



The invisible Chinese leader

Despite the increasing economic and political power of China, its leader, Xi Jinping, does not enjoy similar favourability ratings in the survey group as his two peers. Xi Jinping is less popular and less well-known. Unlike Biden and Putin, one in four CEE respondent, in fact, never heard of Xi Jinping. In some countries, the share of those unaware of the leader of the world’s most populous country reached 30% or more (Slovakia 39%, Bulgaria 38% and Poland 34%).

One in four CEE respondents never heard of Xi Jinping.

Such perception of Chinese leader attests to the fact that China’s presence in the surveyed countries is either viewed with suspicion or largely ignored. Further details on findings pertaining to China are included in the next chapter. [SEE PAGE 26](#)

Joe Biden is perceived favourably, on average, by 53% of respondents in surveyed countries.

Vladimir Putin, meanwhile, trails these figures by nearly 20 points, putting his positive sentiment at 35%.

Xi Jinping, for his part, ranks third in the superpower grouping at 16%.

Three times as many people believe that Alexei Navalny should not have been sent to prison following his poisoning than support the decision of Russian authorities.

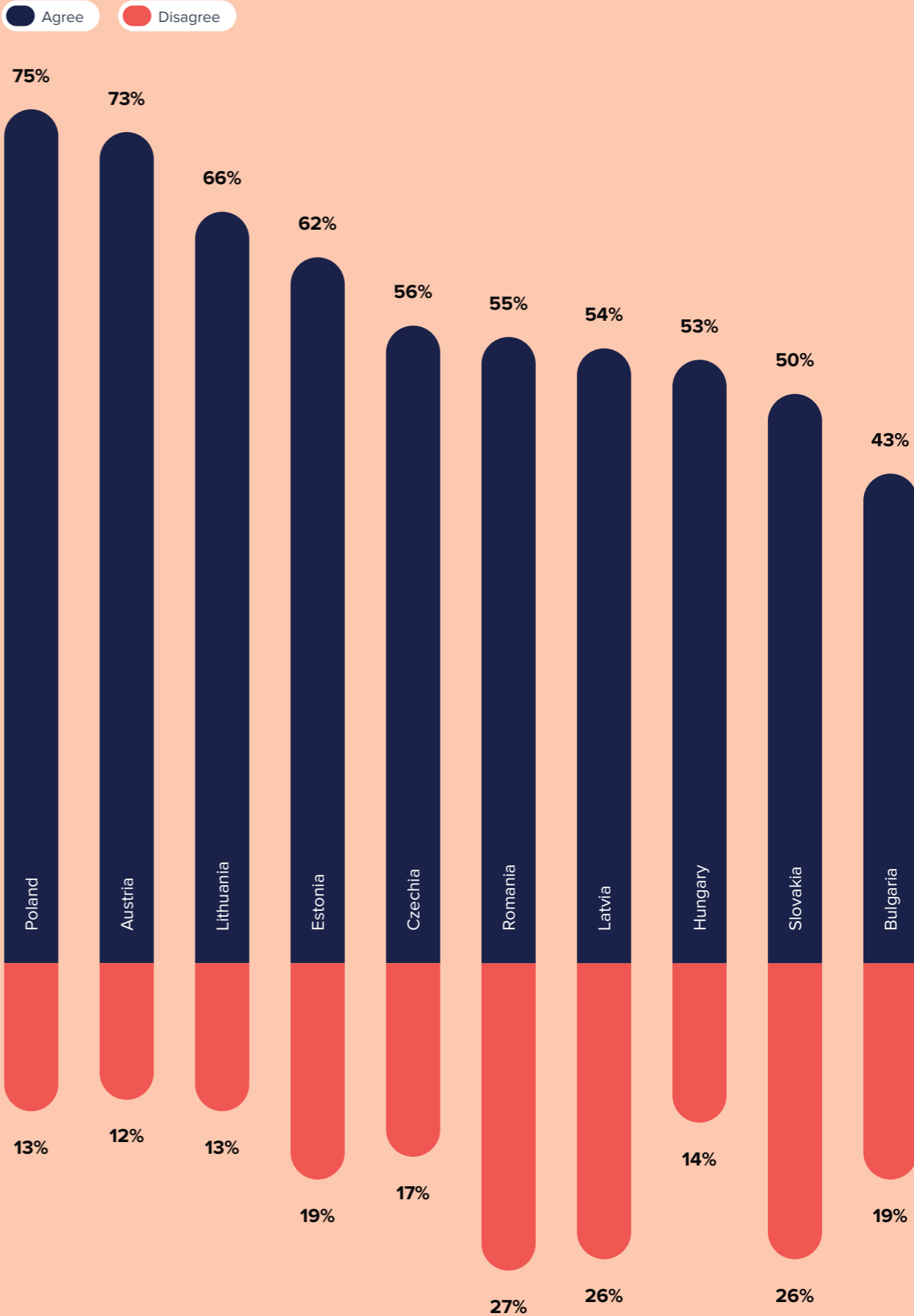


Alexei Navalny – a prisoner of conscience

The case of Russian opposition leader Alexei Navalny, who was poisoned in Russia with Novichok, strongly resonates in the 10 surveyed countries. His extraordinarily courageous return to Russia, following his hospitalisation and recovery in Germany, has been closely followed by respondents in the region.

The immediate detention and sentencing of Navalny to a lengthy prison term is opposed by a majority of respondents in 9 of 10 countries. Even in consistently pro-Russian countries like Slovakia and Bulgaria, twice as many people reject the move than support it.

Alexei Navalny should not have been sent to jail by Russian authorities after being poisoned.



China

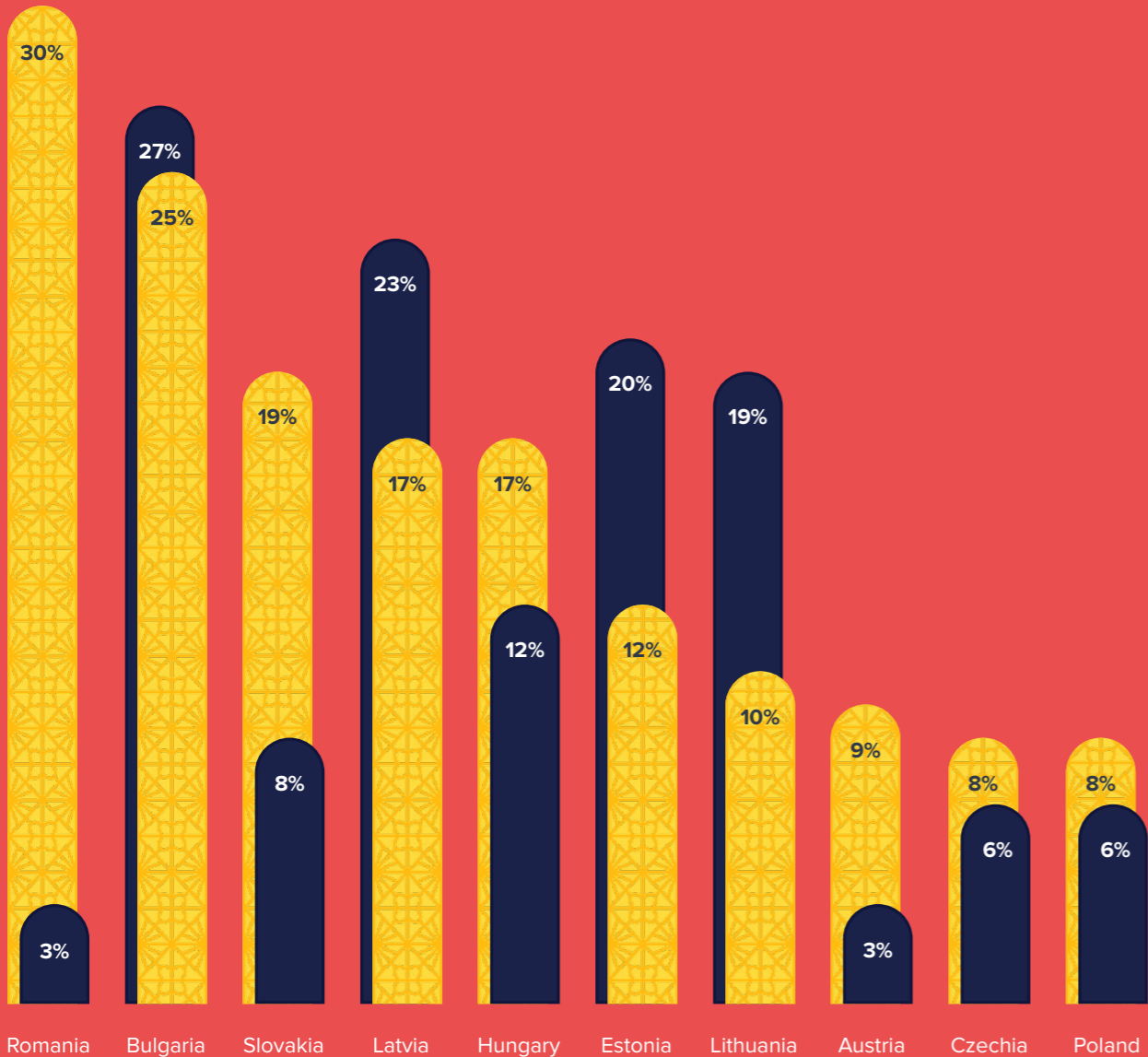


Chinese attempts to augment Beijing's influence around the world have not overlooked CEE. Though some manoeuvres, including the acquisition of mass media outlets, concerted efforts to engage in narrative control concerning stories about China⁴ and cooperation with universities⁵, might have previously attracted little attention throughout much of the region, Beijing has been more in the spotlight in recent years.

China has indeed garnered headlines for its attempts to deflect blame for the initial spread of coronavirus⁶, its mask⁷ and vaccine diplomacy⁸ and its role as a key economic rival of the US⁹. Beijing has also become a target of EU sanctions over human rights abuses¹⁰. These developments have all created a window through which societies could become better informed on China and formulate opinions on the regime and its influence methods. As our data shows, however, people in the region appear not to buy into the narrative of China as presenting a threat to the region. This backdrop is enabling China to intensify its influence operations in the region.

Chinese regime could be an inspiration for my country.

Agree Do not know



Perceptions of China differ

Perceptions of China vary vastly across the region. Even as Chinese influence expands throughout the world (including the CEE region), societies remain little aware of these developments and the Chinese government more broadly according to our survey and prior polling data. At the same time, our data underscores the fact that certain segments of the CEE region generally harbour

sympathies towards authoritarian regimes¹¹. This dynamic helps explain the 15% of respondents that deem China an “inspiration” for their own country. The greatest levels of self-proclaimed awareness regarding China were measured in Austria, Czechia and Poland. The largest shares of “don’t knows”, meanwhile, were found in the Baltic states and Bulgaria, underlining the need for more targeted awareness-raising in these countries given the potential vulnerability of the societies to opinion persuasion endeavours.



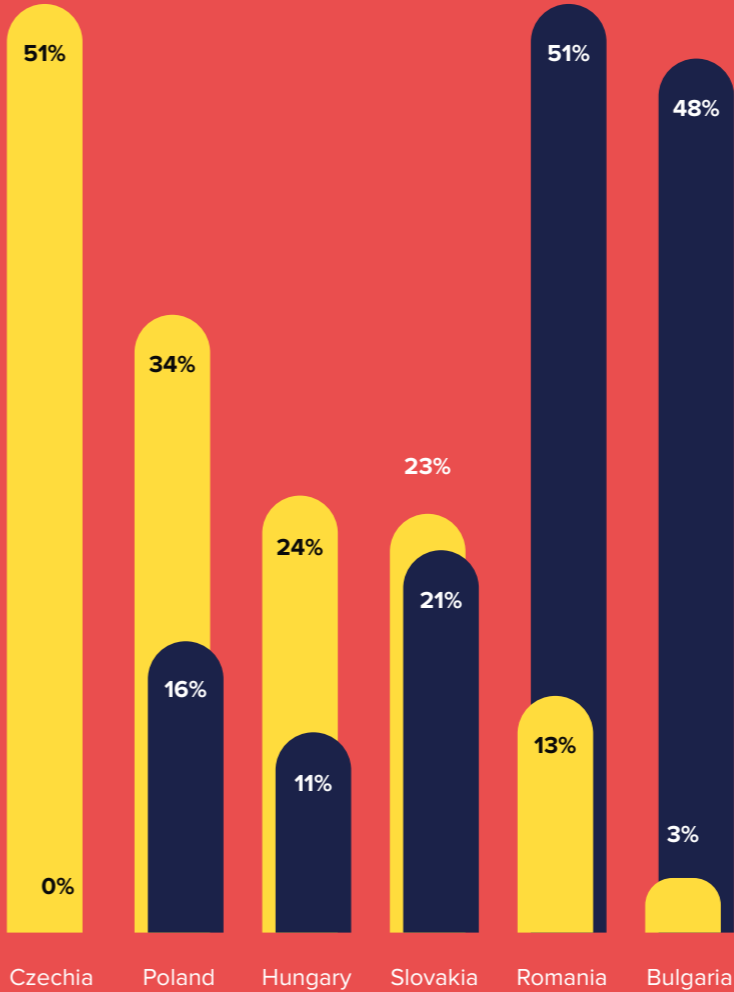
China’s media influence has grown on the back of the dissemination of Chinese content through bilateral agreements with local media outlets and exchange visits for Bulgarian journalists.”

Center for the Study of Democracy, Bulgaria

Perception of China as a threat

Do you believe China presents a danger (significant threat) to your country? (GLOBSEC Trends 2020 polling)

Yes Do not know

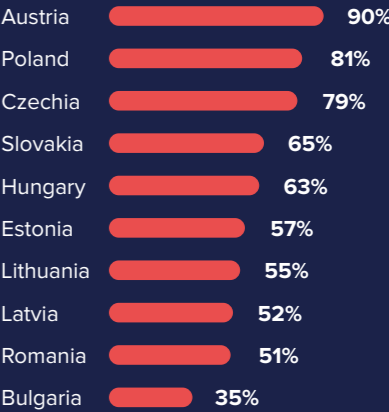


The awareness of China is rather low in the Baltic states, Bulgaria and Romania.

Human rights in the spotlight

China’s lack of respect for human rights is an issue that appears to resonate with people across the CEE region. More than 50% of respondents in every country, apart from Bulgaria, believe that human rights violations are occurring in China. In light of the region’s own troubled history, including the severe deprivation of fundamental rights and freedoms through the end of the 20th century, the topic presents a window of opportunity for increasing overall interest and awareness regarding Chinese influence operations.

Those who agree that human rights in China are being systematically violated



“There is considerable media coverage of human rights violations against the democracy movement in Hong Kong, the treatment of the Uighur ethnic group and the situation in Tibet. The Chinese political system, characterised by one party rule and the restriction of civil and human rights and disregard for the rule of law, further casts a shadow on the country’s image more generally, too.”

Austrian Society for European Politics (OGfE), Austria

European partners



The three European countries with the largest populations and nominal GDP figures are important partners for the region in a range of areas, be that trade or EU negotiations. In the past years, our polling in perception of strategic partners concentrated on Germany and France. But with the UK now out of the picture in the EU, a competitive atmosphere between the three countries could serve as newfound impetus for power. Tracking changes over the upcoming years in perceptions towards the UK in the region will, consequently, provide an indication concerning how these developments are playing out.

4 Which of the following are the most important strategic partners of your country today?

Pick max 2 from the following list of countries: US, Russia, China, Germany, France and the UK. Percentages below the UK, Germany and France correspond to the respondents who chose them as one of two top strategic partners for their country.



UK

- Estonia 18%
- Czechia 17%
- Romania 16%
- Latvia 15%
- Poland 15%
- Lithuania 14%
- Slovakia 12%
- Bulgaria 9%
- Austria 8%
- Hungary 7%



France

- Austria 35%
- Slovakia 23%
- Lithuania 21%
- Czechia 18%
- Romania 17%
- Latvia 16%
- Bulgaria 11%
- Poland 10%
- Estonia 9%
- Hungary 5%

The presence of robust trade ties and, in some countries, economic dependency has undergirded the recognition of Germany as a strategic partner by a larger share of respondents in all surveyed countries apart from Romania and Poland where slightly more people selected the US. France is considered an important strategic partner by an average 16% of respondents and the UK by 13%.



Germany

- Austria 86%
- Czechia 69%
- Slovakia 64%
- Lithuania 58%
- Latvia 58%
- Hungary 50%
- Bulgaria 50%
- Estonia 49%
- Poland 48%
- Romania 42%



"The findings are highly consistent with the prevailing consensus that Lithuanians are generally adamantly pro-EU and pro-NATO and supportive of ensuing cooperation with partners in these organisations. The fact that Germany outpaces France on the strategic partnership perceptions is also unsurprising given the relatively closer relations between Lithuania and Germany and Berlin heading the NATO Enhanced Forward Presence in Lithuania."

Eastern Europe Studies Centre, Lithuania

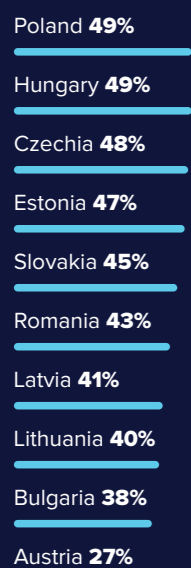
Apart from Poland and Romania, where the US was more preferred, Germany was the most commonly selected strategic partner in every surveyed country.

Have you previously heard about the following leaders and if yes, do you perceive them positively or negatively?

Share of those who view a particular world leader positively



Boris Johnson



Emmanuel Macron



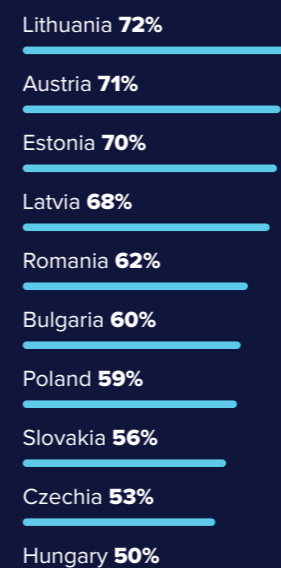
Emmanuel Macron's favourability, notably, correlates with those identifying France as a strategic partner – i.e. in those countries where Macron is viewed most positively, France is also selected as a strategic partner by the highest percentage of respondents.

This finding indicates that the perceptions of European countries and their leaders are, to some extent, interlinked, though causality cannot be definitively established.

There is a close relationship between identification of the three European countries as strategic partners and the popularity of their three leaders. While Chancellor Merkel is perceived most positively in the region, with 62% of respondents giving her a favourable rating, Emmanuel Macron enjoys an above water image among 54% of people surveyed in CEE and Boris Johnson 43%.

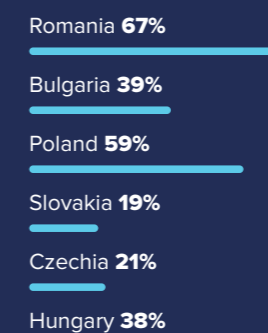


Angela Merkel



Merkel's spike in popularity

Those who found Angela Merkel "likeable" in 2017



Historical data indicates that the popularity of the leaders is not static and rather sensitive to international developments. In GLOBSEC Trends polling in 2017, the image of Angela Merkel was far worse in Bulgaria, Hungary, Czechia and Slovakia than today. Nearly three times as many respondents indeed now perceive Angela Merkel more positively than in 2017 in Slovakia and Czechia. One plausible explanation concerns the fact that the migration crisis, which was still present on the political agenda in 2017, saw Germany stake out a contrasting position to that of the V4 countries.



"Germany has long been a preferred partner in Hungary, with the economic importance of Hungarian-German bilateral relations widely recognised. Audi and Mercedes are among the country's largest employers, a fact frequently mentioned in the Hungarian media. The not too favourable views of Chancellor Merkel and President Macron are probably the result of aggressive targeting of each by pro-government media at different points. Merkel was primarily attacked for her role in the migration crisis, whereas Macron was identified as a key opponent of Prime Minister Orbán on the EU scene following his election victory."

Political Capital, Hungary

No opinion

Up to 25% of respondents in some countries expressed no opinion towards Emmanuel Macron and Boris Johnson. The highest level of indecisiveness was recorded in Latvia and Lithuania (approximately 1 in 4 declined to express an opinion or did not know what to think of on Macron and Johnson), with sizeable pockets of people uncertain in Bulgaria, Estonia and Hungary (approximately 1 in 5). These survey findings could indicate limited societal awareness of political developments in other European countries.

European Union



The EU has maintained steady support across the Central and Eastern Europe region over the past few years. This pattern, as evidenced by the attitudes of respondents, has not been noticeably impacted by the pandemic, indicating that EU membership has become an accepted norm in the region and an element blurring the line between the “old” and “new” member states. Czechia has traditionally been the most Eurosceptic EU member since its accession in 2004, with support for EU membership in the country fluctuating between 60% and 70%.

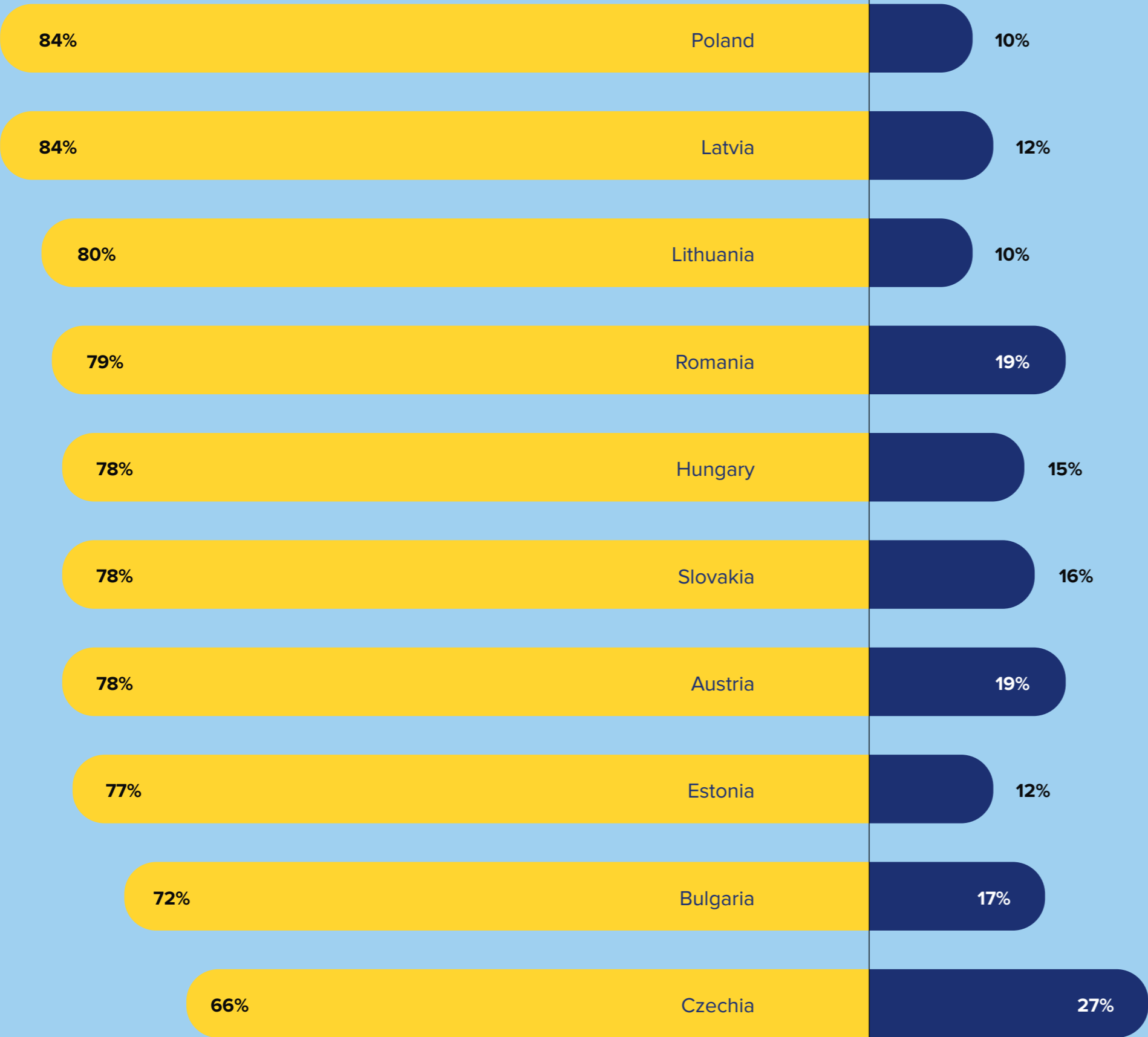
5

EU: Stay or leave

European Union

? Imagine, that the following weekend, there will be a referendum in your country on its membership in the EU. How would you vote – for your country to stay in the EU or leave the EU?

Stay Leave



5

No decline of support

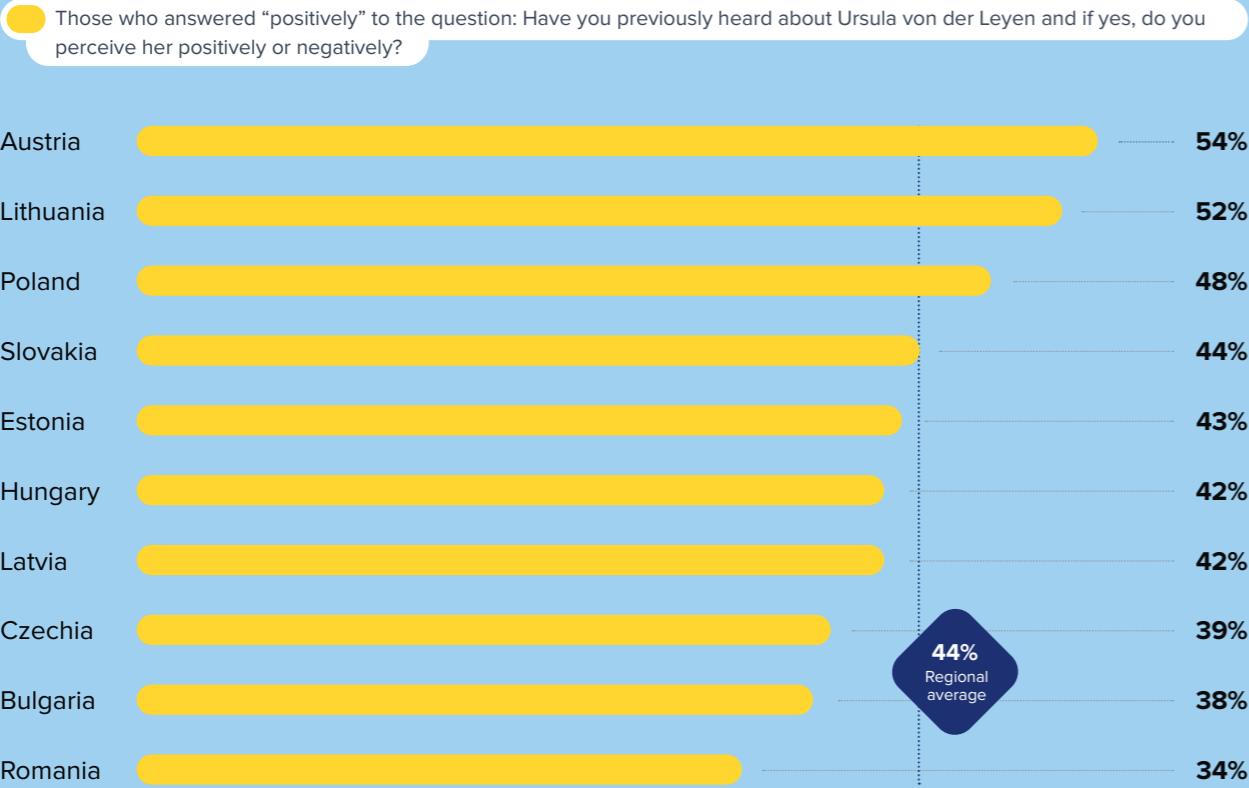
European Union

Support for EU membership has been relatively steady in every surveyed country since our polling began in 2017/2018, with a few shifts back and forward.

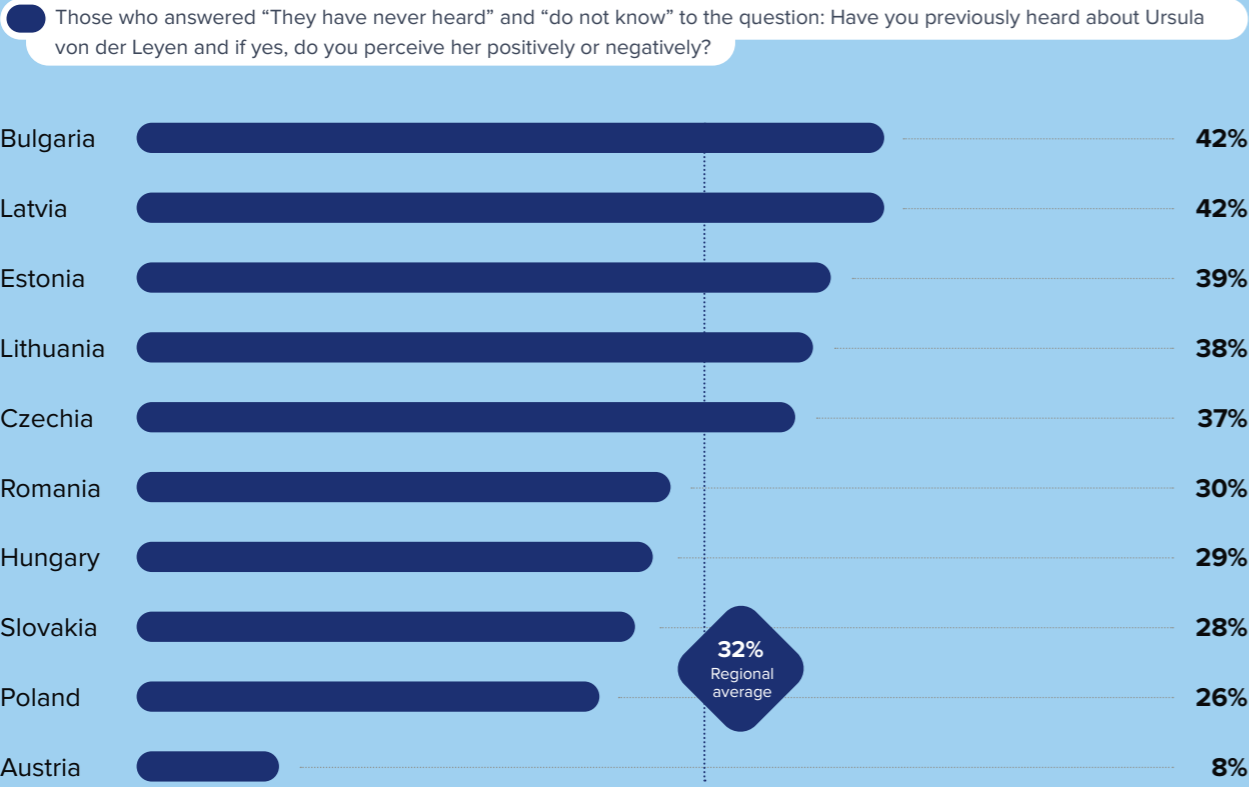
The only country with a clear trend in any direction is Slovakia, with support for EU membership gradually rising from 66% in 2018 to 78% in 2021.



Positive perception of Ursula von der Leyen



Lack of awareness of Ursula von der Leyen



EU Commission President

An examination of general awareness and attitudes towards EU Commission President Ursula von der Leyen can help shed light on a range of issues. Is the president covered in CEE media? Has the EU and its member states managed to associate the EU with key personalities and leaders rather than merely institutions and bureaucracy? Initiatives to enhance the personalisation of the EU appear to be having an effect at least in V4 countries. In the GLOBSEC Trends 2018 poll, 27% of respondents in the V4 said they had never heard of then President Jean Claude Juncker. Only 17% of respondents indicate the same level of ignorance today.

Relatively low awareness, nonetheless, is still apparent, exemplified in the withholding of opinions towards von der Leyen. Excluding Austria, 35% of respondents in CEE either had never heard of von der Leyen or held no opinion on her. Unlike general support for EU membership, a gulf between the "old" and "new" member states can still be seen on this matter. Few people have formed no opinion on von der Leyen in Austria - 54% rate the EU Commission President positively and 38% negatively. In Lithuania, where von der Leyen is also quite popular, only 10% perceive her negatively, though 38% indicate that they had either never heard of her or did not know how to respond.



While 27% of V4 respondents had never heard of then EU Commission President Jean Claude Juncker in 2018, only 15% have never heard of Ursula von der Leyen according to 2021 data.

NATO



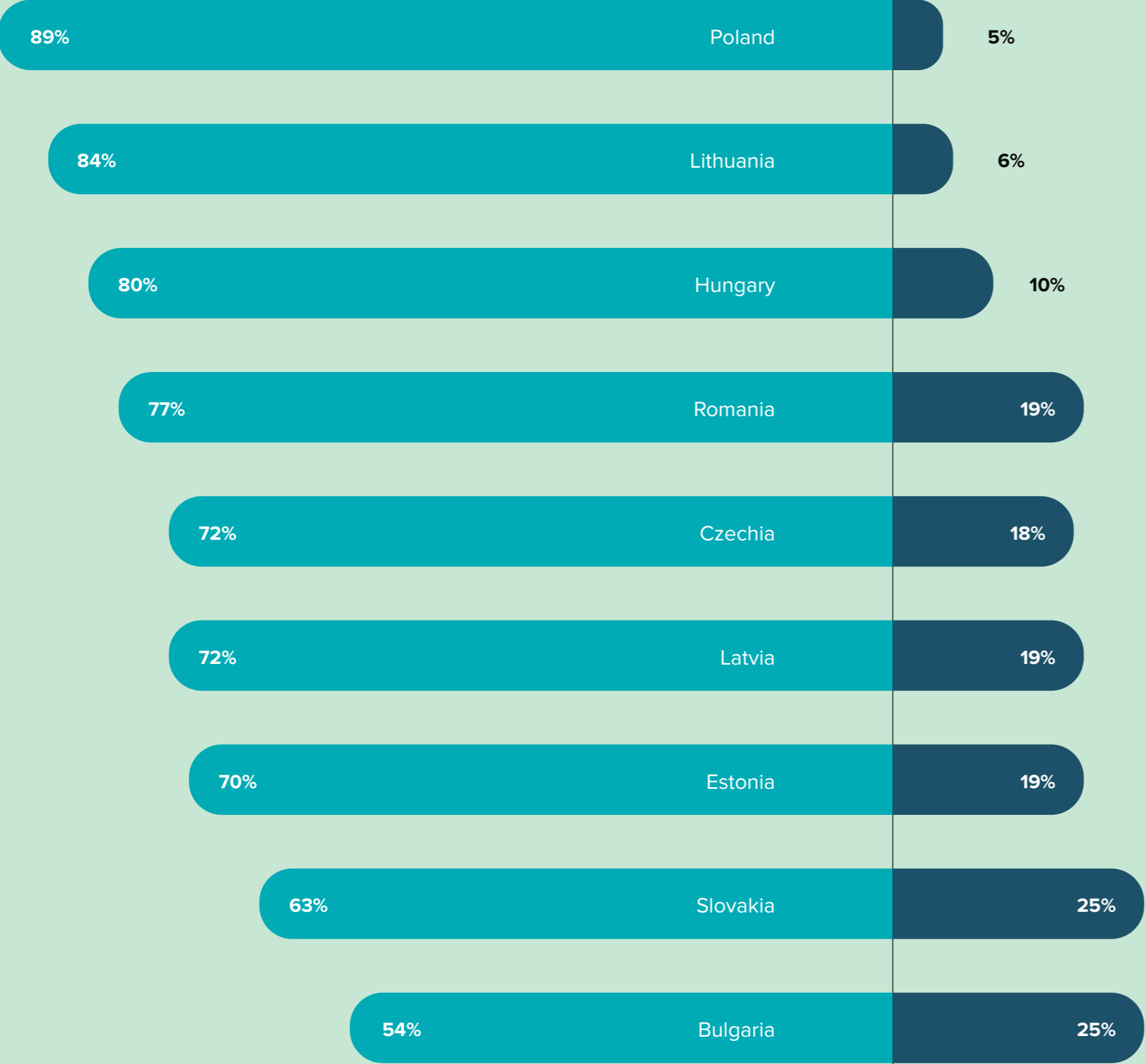
The former Warsaw Pact countries, which joined NATO following the fall of communism, continue to perceive the security guarantees provided by NATO to be paramount to their safety and stability. While there are notable differences between individual countries, overall attitudes towards NATO membership are largely positive with 73% of respondents, on average, affirming their support.

6

NATO: Stay or Leave

⚙ Please, imagine, that the following weekend, there will be a referendum in your country on its membership in the NATO. How would you vote – for your country to stay in NATO or leave NATO?

Stay in NATO Leave NATO



The categorisation of post-communist countries into several camps based on their support for NATO is still pertinent. Poland, followed by Lithuania, continues to indicate the greatest level of NATO support in the region. Bulgaria and Slovakia, meanwhile, tally the least backing for NATO membership.



“Poles are well aware of their geopolitical situation and own defence capabilities, meaning: a) they border a nuclear empire which is both capable and willing to extend its sphere of influence, b) they do not alone have sufficient means to resist potential aggression or might not withstand strong economic and political pressure without the support of allies. For that reason, Poland perceives its almost unconditional support for NATO as a sine qua non condition of its independence from Russia. There is also no dependable alternative to NATO as other alliances and organisations in which Poland partakes lack comparable military capabilities that could deter potential aggression.”

Kosciuszko Institute, Poland



Despite (or perhaps because of it) increasing tensions between Russia and the West, which according to some are at their worst since the end of Cold War, support for NATO membership is largely stable in most countries.



Romania, viewed as a NATO hawk, experienced a notable rise in “leave NATO” sentiment, reaching nearly 20% of the population.



Bulgaria witnessed a slight increase in NATO membership support, triggered by the improvement of US - EU relations. Furthermore, continuing revelations about malign Russian interference in Europe and Bulgaria, as well as a more robust strategic communication outreach from Brussels explains this improvement.

Center for the Study of Democracy, Bulgaria

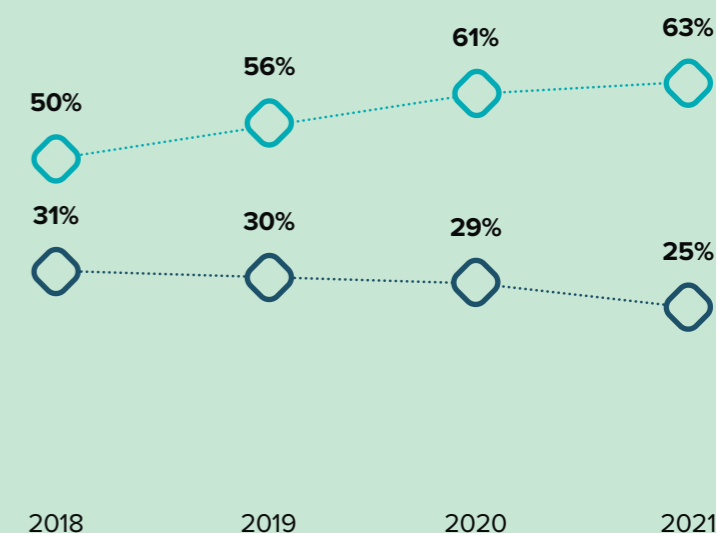
Increasing support for NATO in Slovakia and Bulgaria

NATO, interestingly, has increased its buy-in slightly in two of the countries with weakest levels of support for Alliance membership. Slovakia sustained its trend of steadily growing support, aggregating to a 13 percentage point increase since 2018. In Bulgaria, where support dropped below 50% in 2020, NATO membership finds itself once again supported by more than half the population following a 7 percentage point increase in support since last year.

Changes in support for NATO over four-year period

Stay in NATO Leave NATO

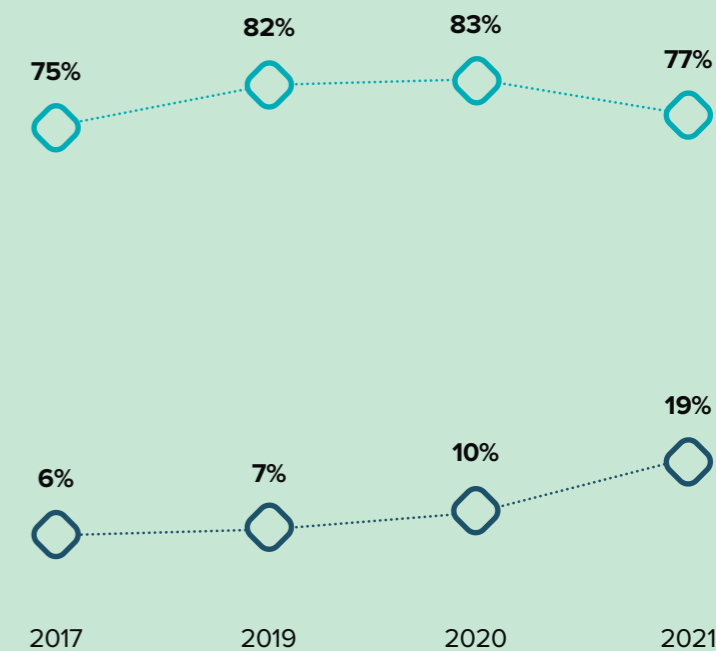
Slovakia



Erosion of NATO support in Romania

Romania, however, has seen the reverse pattern transpire. Though the country is regarded as one of the staunchest NATO allies in the region, there has been an increase in respondents voicing negative sentiment towards membership, with support falling six percentage points and the leave camp increasing by 9 percentage points. While an overwhelming majority of Romanians still support NATO membership, recent attitude shifts could, nevertheless, indicate an erosion of the stable support once enjoyed for the Alliance in Romania.

Romania



COVID-19



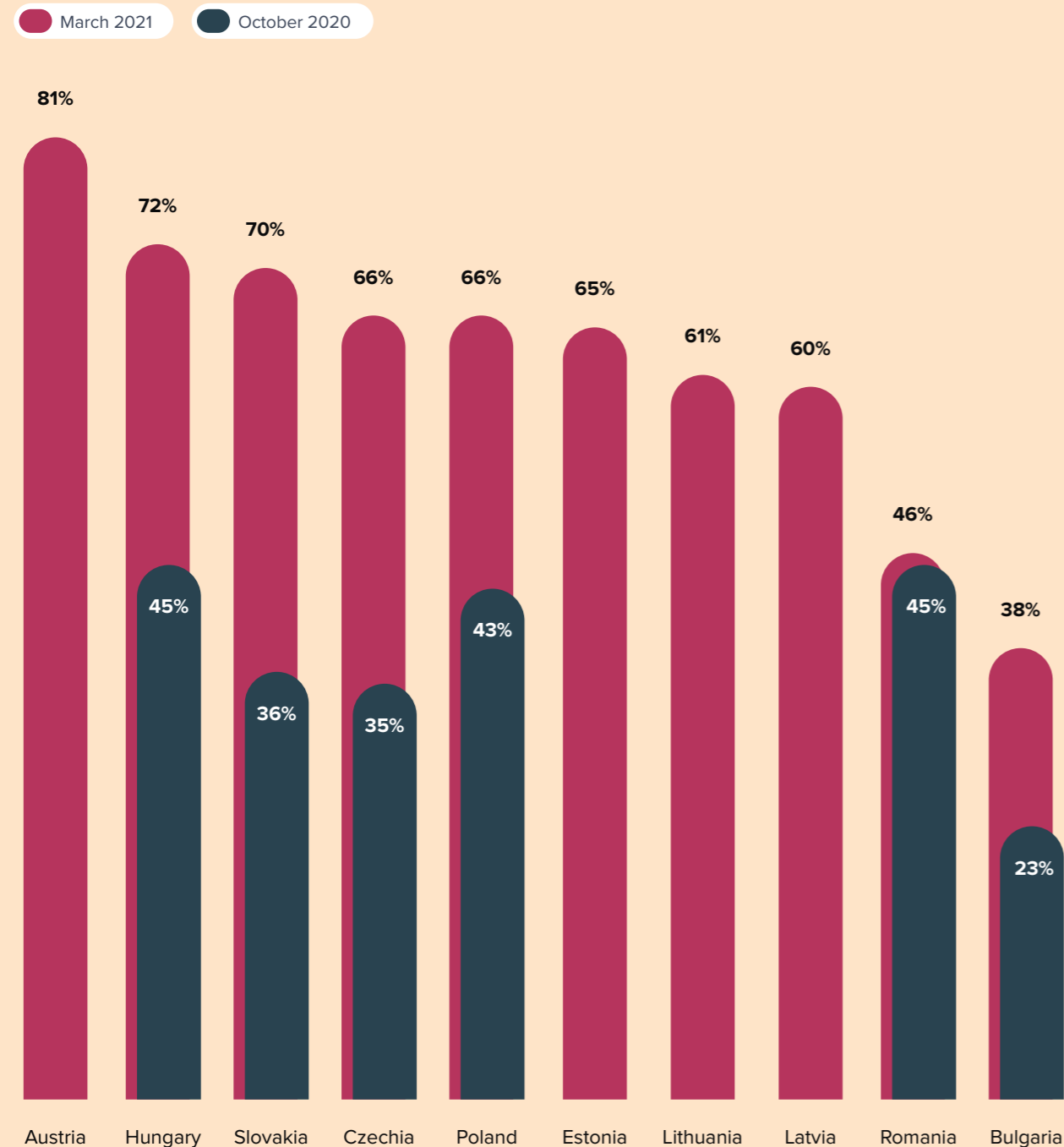
Since October 2020, worrying signs of the COVID-19 second wave began manifesting across Europe, with rapid spikes in the number of reported cases¹². By March 2021, CEE countries, which had been commended during the first wave for their quick imposition of strict lockdown measures (and few COVID-19 related fatalities), were among those most affected¹³.

Slovakia, for example, garnered negative international press coverage, recording the highest COVID-19 related death rate per million citizens in the world¹⁴. Similarly, Hungary, Czechia, Bulgaria, Poland and Romania found themselves among the top 25 countries with the highest death rate per million citizens¹⁵.

There are several factors at play that contributed to this debacle including an extensive easing of safety precautions during the summer, inadequate preparation for the second wave and hesitant attitudes towards the reimposing of lockdowns in autumn and winter¹⁶ along with poor quality of health care systems. As CEE countries reel from the devastating impact of the second wave on families, livelihoods and the economy, the implementation of an efficient vaccination strategy presents a viable path forward.

Vaccination potential

? Vaccination potential is calculated as the sum of those who responded to the question 'Are you planning to get vaccinated against COVID-19?' with (a) definitely yes, (b) rather yes and (c) already vaccinated.



Vaccination potential increases with education.

Vaccine rollouts are changing the playbook, with some countries like Israel and the UK managing to rein in the pandemic through rapid and efficient vaccination campaigns¹⁷. The vaccination picture has been more complex in CEE though. Russian vaccine diplomacy, for example, has triggered political crises in some countries¹⁸ at the expense of the implementation of systematic vaccination strategies through EMA-approved vaccines.

The success of Russian and Chinese vaccine diplomacy, nevertheless, has been limited in CEE, with only 5% of the adult population of the region expressing a preference for the Sputnik V vaccine over others and less than 1% for Chinese vaccines like Sinovac as of March 2021¹⁹.

COVID-19 & Conspiracy narratives

Despite the detrimental impact of the second wave of COVID-19 on CEE countries, the allure of COVID-19 related conspiracy narratives persists. Failing to address this problem through efficient communication strategies that are targeted at all segments of the population including those with lower levels of educational attainment who are more likely to forgo vaccination²⁰ will contribute to unsatisfactory inoculation campaigns and ultimately the inability to achieve herd immunity essential to averting further pandemic waves.

28% of CEE respondents, on average, believe COVID-19 is a ploy to control them.



Overestimated cases

The narrative asserting that public authorities are overestimating the number of COVID-19 cases attracts a varied range of adherents across CEE. In every surveyed country, however, buy-in still amounts to at least 20% of the population.

The dissemination of harmful content online by belligerent actors contributes to the prevalence of this narrative²¹, demonstrating the inefficiency of initiatives by digital platforms to curb the spread of COVID-19-related disinformation²².



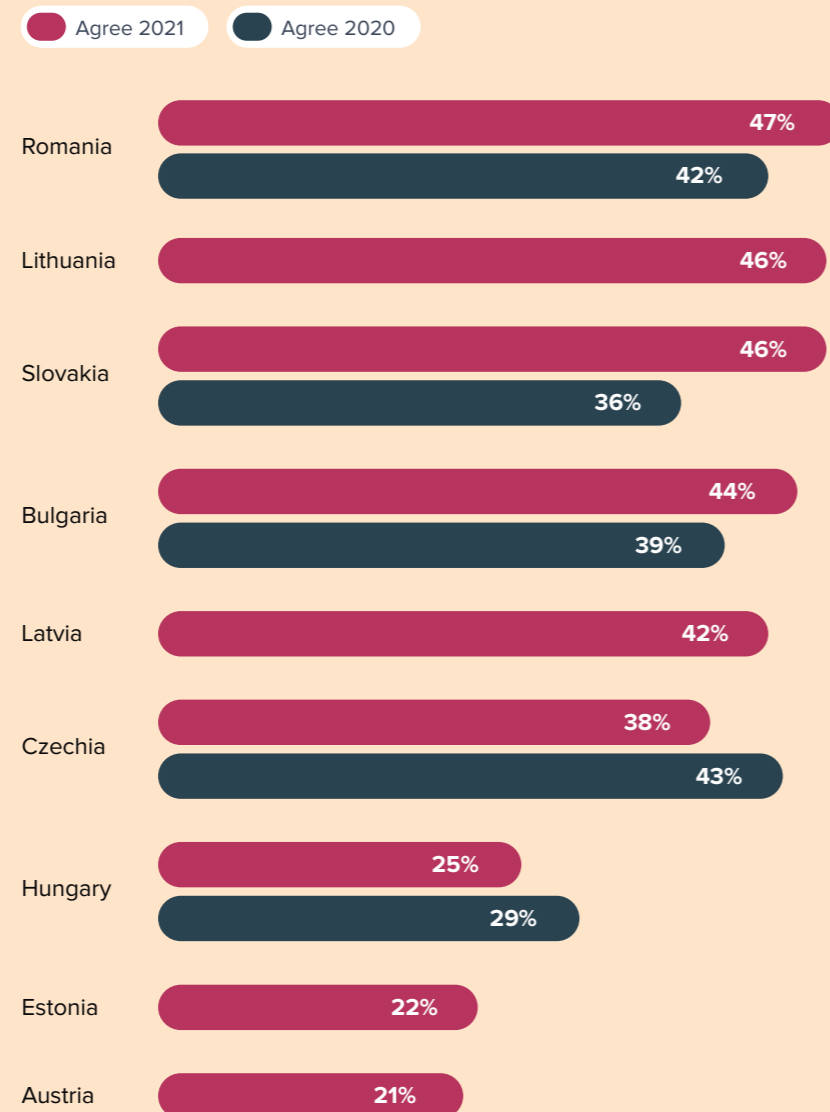
“In Slovakia, the 10-percentage point increase in popularity of this narrative is surprising given the 10,000 COVID-19 related deaths as of April 2021²³ in a population of under six million. In addition to the active promotion of this narrative by disinformation actors, the perceived mismanagement of the pandemic (75% of respondents think the government handled the pandemic badly) and the resulting mistrust of government (66% of respondents) underscore why.

GLOBSEC, Slovakia

In Poland, the reverse concern is prevalent, namely that the real number of COVID-19 cases is higher than the country's public authorities are reporting, with 53% of the population subscribing to this claim. And this belief is shared by 75% among those who think that the government has handled the COVID-19 crisis badly*.

* In Poland, a different question was posed to respondents: “The official number of COVID-19 cases, shared by the authorities (public institutions) in my country, is smaller than in reality” instead of “The official number of COVID-19 cases is lower than my country's public authorities (institutions) tell us”.

Official number of COVID-19 cases is lower than my country's public authorities tell us



20% of respondents in Bulgaria & Lithuania do not know whether official number of COVID-19 cases is lower than their country's public authorities tell them.

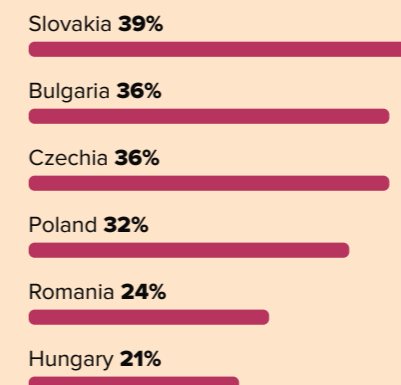
Fake pandemic

On average, only 9% of respondents agreed with the statement that COVID-19 is fake and does not exist. Romania, however, due to being a significant outlier is excluded from the aggregated figures.

Belief in conspiratorial narratives regarding COVID-19 is reflected in lower vaccination interest across surveyed populations. Countries with a smaller proportion of respondents who think COVID-19 is fake also include more people willing to get vaccinated compared to places where buy-in to this narrative is more prevalent.

COVID-19 is fake to manipulate the population

Agree, October 2020



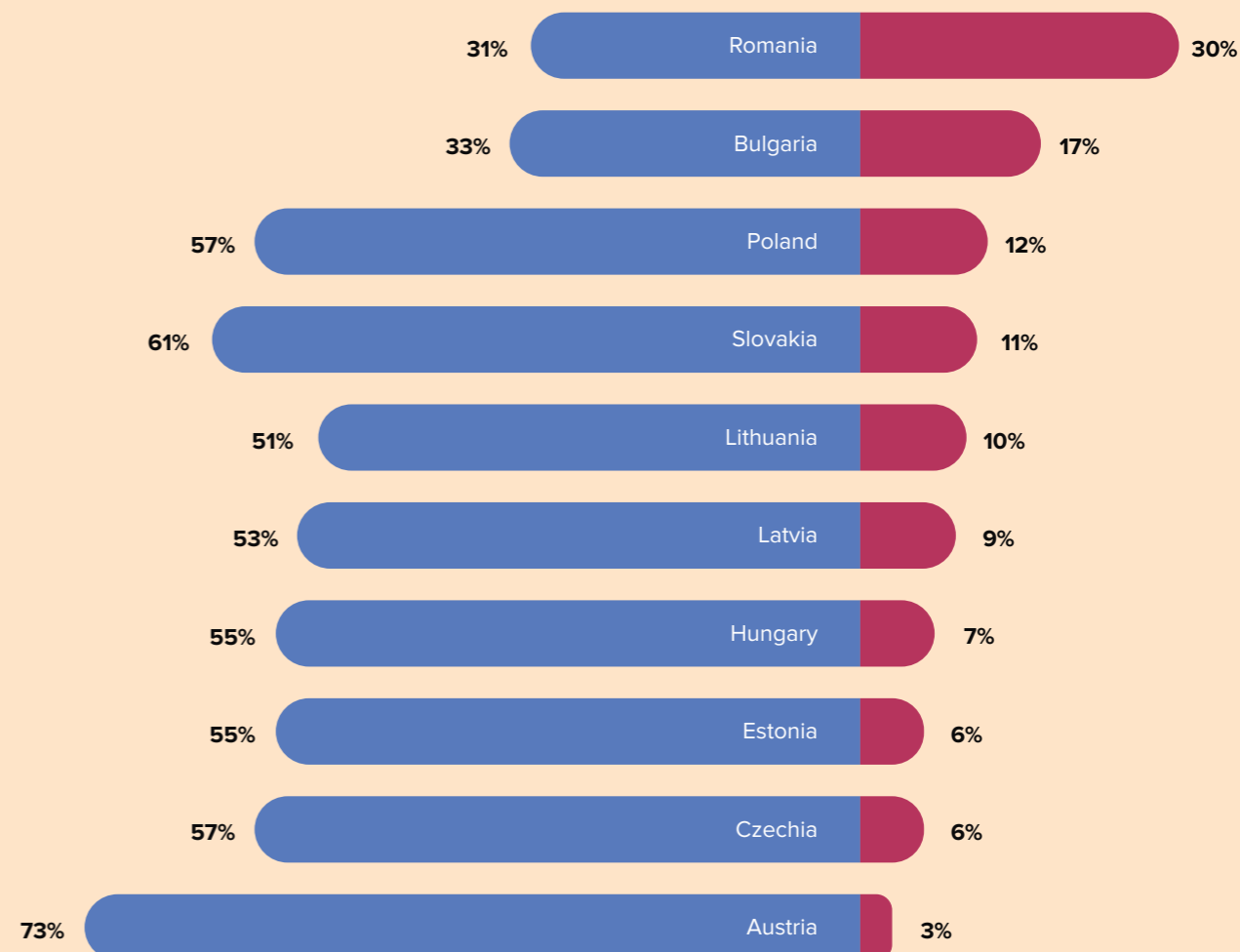
“Romania adopted restrictive measures early on and did not suffer the same COVID-19 fatalities that Italy was facing in March-June 2020. This may have persuaded some people to think the pandemic was either entirely made up or largely inflated in terms of contagion, manifestation, medical needs and number of deaths.”

Funky Citizens, Romania

Willingness to get vaccinated versus belief that COVID-19 is fake

Proportion of adult population planning to get vaccinated

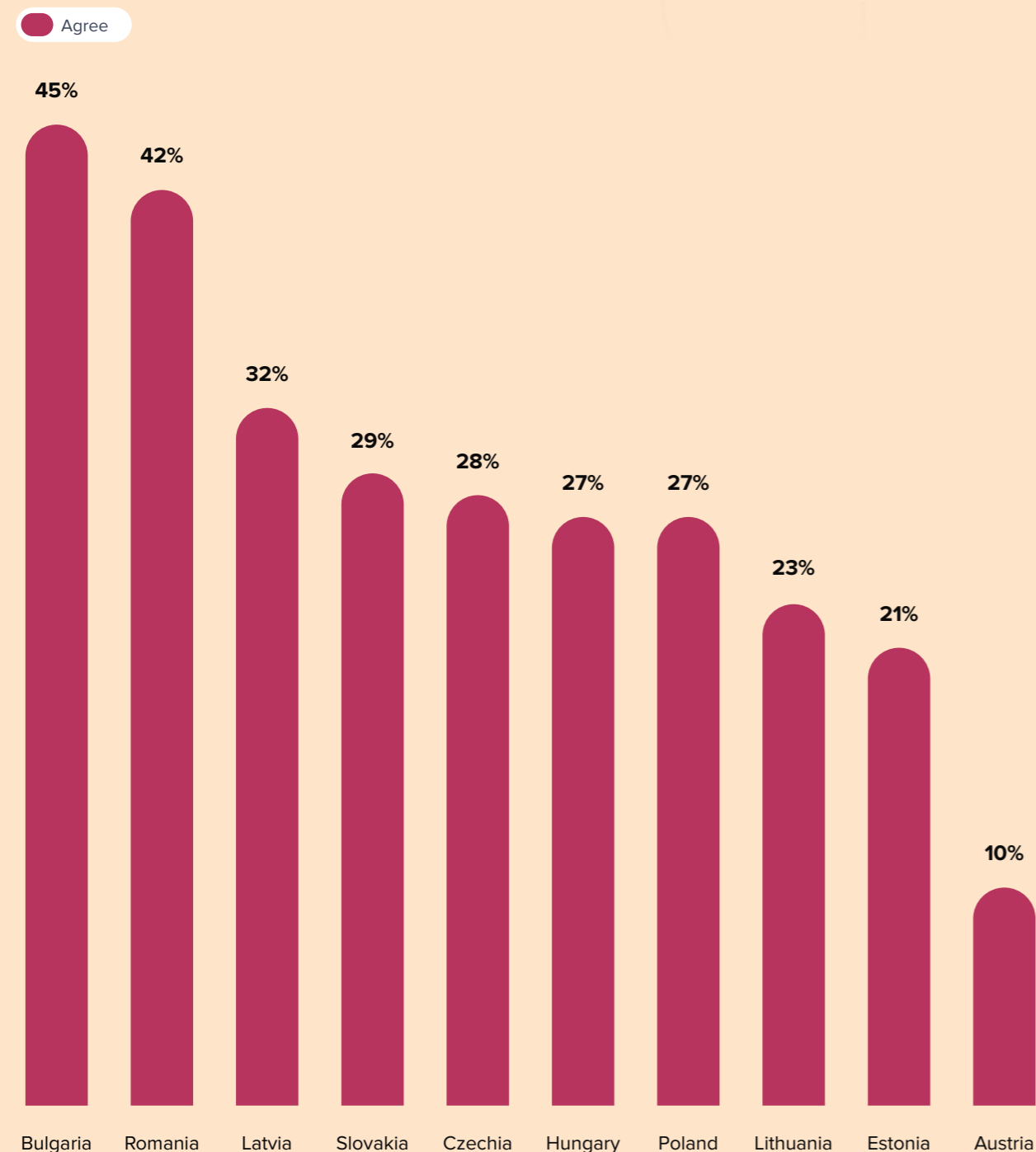
Proportion of population who agree that COVID-19 is fake and does not exist



COVID-19 as a planned operation

This variation of the classic New World Order conspiracy narrative²⁴ attracts a range of appeal across the CEE region. Its buy-in across the V4 is generally homogenous, however, with 28% of respondents agreeing that COVID-19 is a ploy to control them.

The COVID-19 pandemic is a planned operation by the hidden forces/elites to control the population.



Prevalence of conspiracy narratives

The widespread uptake of conspiracy narratives in Bulgaria and Romania, as indicated by their conspiracy ranking, is associated with lower vaccine interest (38% in the former and 46% in the latter) in the two countries²⁵. This finding entails that the pervasiveness of COVID-19 conspiracy narratives could significantly hinder the ability of countries to overcome the pandemic.

Conspiracy ranking

0% ————— 40%

² The conspiracy ranking is calculated as the average response in agreement with three conspiratorial statements about COVID-19 in each country. These statements are: (a) Official number of COVID-19 cases is lower than my country's public authorities (institutions) tell us; (b) COVID-19 is fake and does not exist; (c) The COVID-19 pandemic is a planned operation by the hidden forces/elites to control the population.



COVID-19 & Trust

The COVID-19 pandemic has resulted in remarkable shifts in the landscape of trust. During the first wave, the rising numbers of COVID-19 cases surged levels of government trust in many countries. Trust in public authorities and their ability to provide factual information also strongly correlated with people’s willingness to get vaccinated. However, new COVID-19 surges with skyrocketing mortality, lacking strategic communication and perceived mismanagement of the crisis burst that trust bubble. In search of trusted leaders, Central and Eastern Europeans have, for now, redirected their attention to medical experts and scientists. However, the raging infodemic continues to undermine the credibility and trust in these authorities as well.

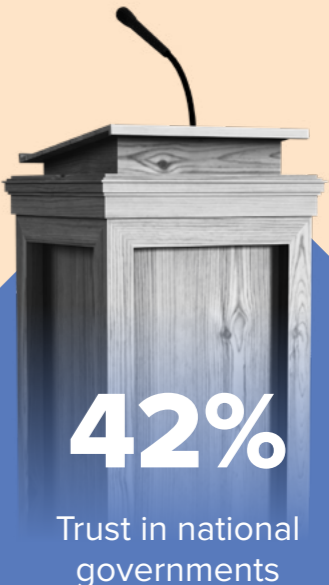
54% of respondents, on average, do not trust their national governments. The highest distrust in government was found in Romania (68%), followed by Czechia and Slovakia with 66%.



Whom do Central and Eastern Europeans trust?

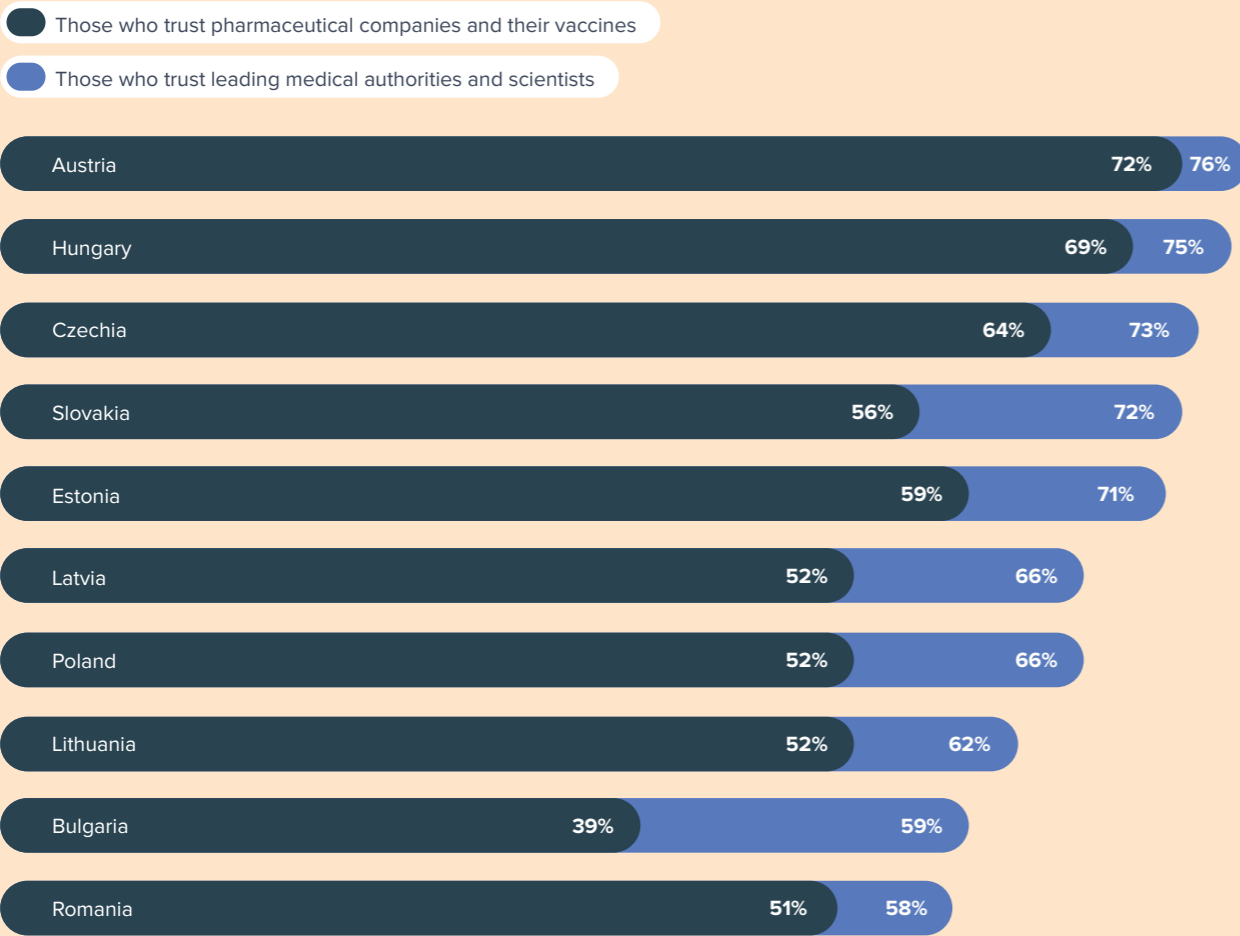
? Average of affirmative answers (“definitely agree” and “rather agree”/ “completely trust” and “rather trust”) of respondents to the statements: “I trust the opinion of the leading medical and scientific authorities on telling us truth about the COVID-19” and “I would like to ask you - how much do you personally trust or distrust the government in [your country].” Average of negative answers (“definitely disagree” and “rather disagree”) to the statement: “I do not trust COVID-19 vaccines because the pharmaceutical companies are only driven by profit.”

The COVID-19 pandemic and the infodemic associated with it have tested public trust of government policies and institutions. While many indeed believe in various conspiracy theories, 7 in 10 respondents, on average, still trust leading medical and scientific authorities. Trust is key to achieving herd immunity.



Trust in medical authorities and pharmaceutical companies and their vaccines

? Affirmative answers of respondents (“definitely agree” and “rather agree”) to the statement: “I trust the opinion of the leading medical and scientific authorities on telling us truth about the COVID-19” and negative answers (“definitely disagree” and “rather disagree”) of respondents to the statement: “I do not trust COVID-19 vaccines because the pharmaceutical companies are only driven by profit.”



40% of Romanians do not trust leading medical authorities and scientists.

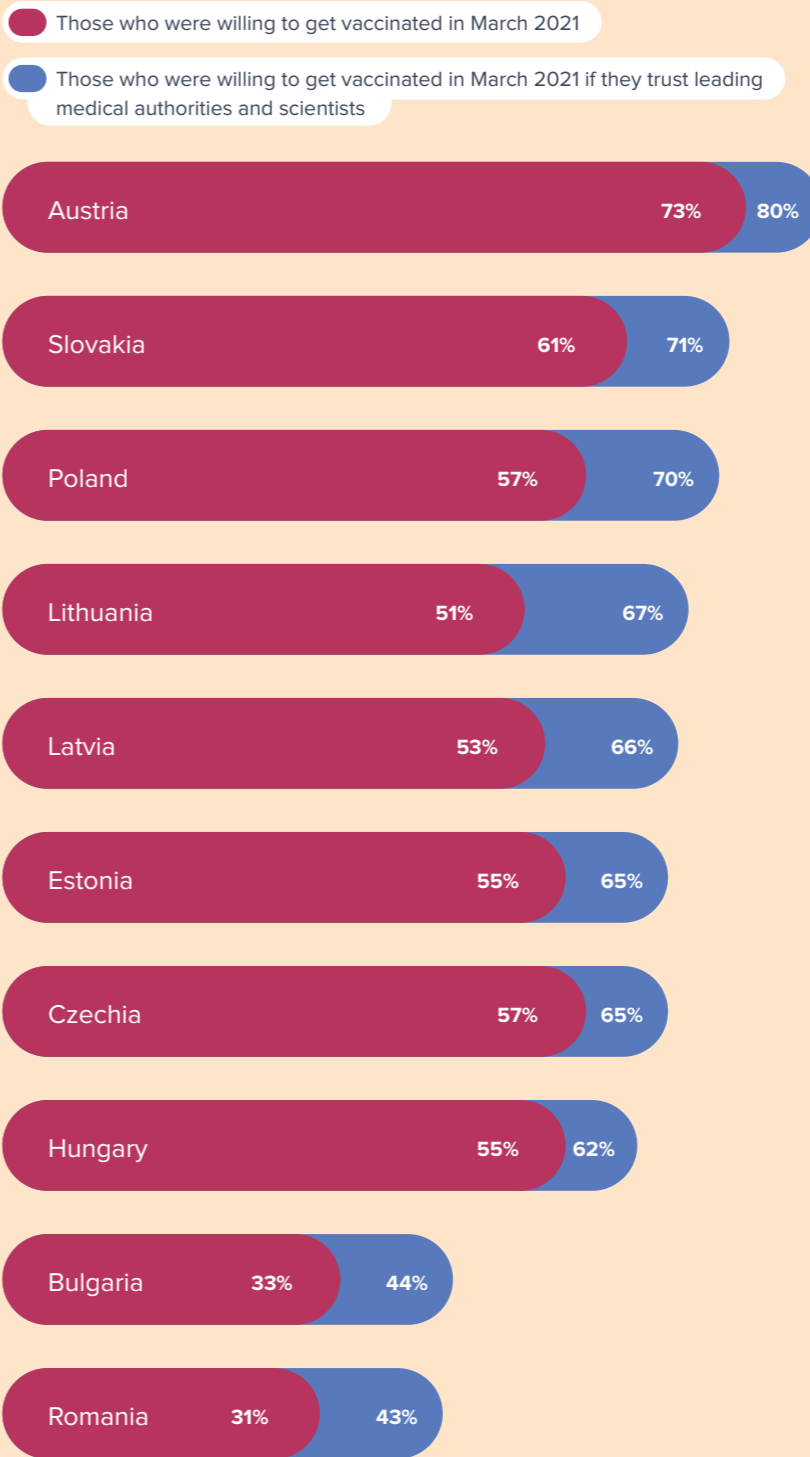
A total of 68% of respondents across the region trust leading medical authorities and scientists and 57% trust pharmaceutical companies on COVID-19 and vaccines. The findings dovetail global trends noted by Edelman Trust Barometer indicating that business was the only trusted institution of four examined by the organisation and scientists the most trusted societal leaders.²⁶

respondents from Romania do not trust leading medical authorities, 13% percentage points lower than the average trust the public grants doctors and scientists.

An atmosphere of distrust, however, persists on certain issues in some countries. A majority (51%) of Bulgarians and 46% of Romanians assert that they do not trust the COVID-19 vaccines because “the pharmaceutical companies are only driven by profit”. And 40% of

The willingness of people to get vaccinated against COVID-19 increases as trust in medical authorities grows

? Affirmative answers (“definitely agree” and “rather agree”) of respondents to the question: “Are you planning to get vaccinated against COVID-19?” compared with affirmative answers (“definitely agree” and “rather agree”) of respondents to the question: “Are you planning to get vaccinated against COVID-19?” among those who also responded “definitely agree” or “rather agree” to the statement: “I trust the opinion of the leading medical and scientific authorities on telling us truth about the COVID-19”.



Trust in medical experts, scientists and vaccines strongly coincides with people’s willingness to get vaccinated against COVID-19. Whereas only 53% of CEE respondents, on average, are interested in getting the jab, the number grows to 68% among those who trust vaccines and believe that pharmaceutical companies are not driven by profit and to 63% among those who trust leading medical experts and scientists.

This finding reinforces the importance of medical experts and scientists as a voice of reason for many Central and Eastern Europeans considering getting vaccinated and bolsters the argument that these experts should become the public face of the vaccination campaign.

“The profiteering component of vaccination has become a newfound focus for many in recent months. And the mainstream media has only reinforced this development through its coverage of the apparently exorbitant profits of Biontech and Pfizer from vaccine sales and the comments of opinion leaders calling for the suspension of intellectual property rights on medical products related to COVID-19. Altogether, these developments have fostered an atmosphere of distrust towards pharmaceutical companies, which are perceived as benefiting from the misfortunes of ‘ordinary’ people.”

Kosciuszko Institute, Poland

Perceptions of the EU vaccination plan

The EU's mismanagement of vaccine contract negotiations and its sluggish vaccination rollout, combined with inconsistent and missed deliveries on the part of pharmaceutical companies, have contributed to widespread criticism of the bloc.²⁷ While Europe is a leader in vaccine production, a considerable share of this capacity has been exported.²⁸ A lack of vaccines and pervasive vaccine hesitancy, in turn, resulted in lower numbers of jabs administered in EU member states compared to the US and UK in early 2021.²⁹ This criticism, paired with the failure of some national governments to order adequate vaccine supplies³⁰ influenced the attitudes of Central and Eastern Europeans towards the procurement and administrations of Chinese and Russian vaccines without EMA safety approval. A significant majority of 60% of CEE respondents indeed think their national governments should alone manage negotiations on the purchase of vaccines rather than the EU. Only 40%, meanwhile, think the EU should manage negotiations on vaccination contracts on behalf of member states.

60% of CEE respondents think their national governments should alone manage negotiations on the purchase of vaccines.

Some uncertain

A minority of 18% in Bulgaria and Lithuania and 16% in Estonia indicated uncertainty on their preferred choice for vaccine contract negotiator. Romanians, meanwhile, expressed contradictory attitudes, with 63% stating their government should handle negotiations on vaccine purchases and yet a majority of 53% preferring to give the nod to the EU over their national government. Similar indecision is in Poland where 52% of respondents think their government should manage negotiations on the purchase of vaccines, while 46% prefer the EU to be in charge.

"Local perspectives on COVID-19 have led many to look at the pandemic through a national interest lenses. Numerous narratives appeared in social media promulgating the view that Poland should take the initiative in the face of the threat, especially regarding the vaccination process, and ensure the safety of its citizens, without considering the interests of other countries and the arrangements made with the EU."

Kosciuszko Institute, Poland

"The continuation of the pandemic put the government increasingly under pressure. Doubts were raised concerning the EU's ability to ensure the fair and sufficient procurement of vaccines. The alleged lack of solidarity in the distribution of vaccines was even put on the agenda at a virtual EU summit."

Member states, however, had mandated the EU Commission to jointly procure the vaccines. The Commission, in fact, conducted negotiations as part of a team encompassing representatives from seven member states selected by a steering committee composed of all member states. The Austrian representative held the position of deputy chairman in this committee until March 2021."

Austrian Society for European Politics (OGfE), Austria



The power of positive personal appeal

Respondents with favourable attitudes towards the leadership of EU Commission President Ursula von der Leyen are more likely to support the EU heading vaccine negotiations. While only 40% of all respondents, on average, think the EU should be negotiating vaccine deals on behalf of member states, this figure rises to 51%

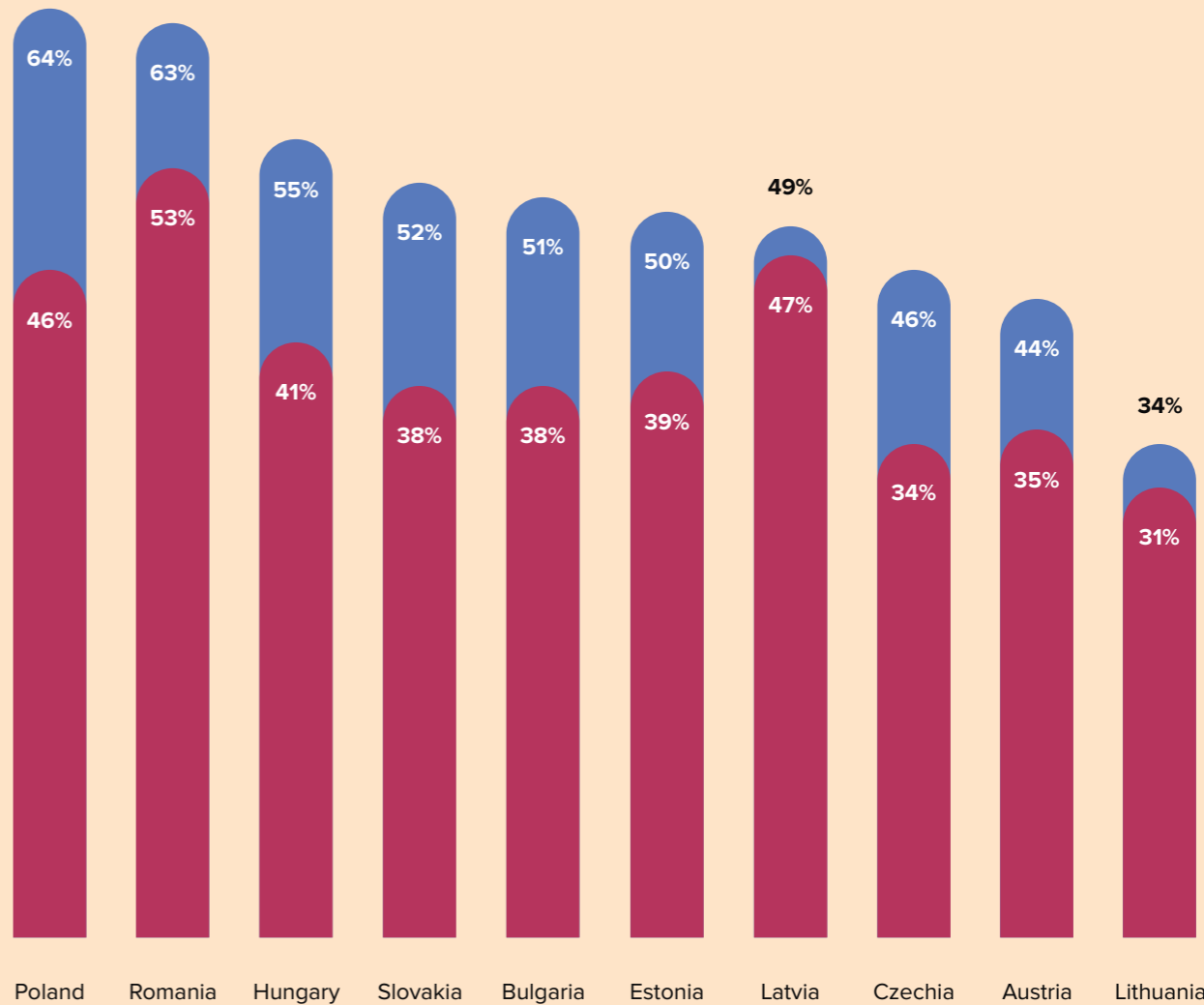
among people who perceive Ursula von der Leyen positively. This included a 17-percentage point increase for EU-led negotiations among Poles judging von der Leyen positively.

Ursula von der Leyen's leadership and vaccine negotiations

① Affirmative answers ("definitely agree" and "rather agree") of all respondents to the question: "EU should deal with the negotiation on buying the vaccines for us instead of our country's government." compared to affirmative answers ("definitely agree" and "rather agree") of respondents to the question: "EU should deal with the negotiation on buying the vaccines for us instead of our country's government." among respondents that answered ("very positively" and "rather positively") to a question pertaining to Ursula von der Leyen: "I will now read you the names of some world political leaders. With each name, please tell me, whether you have already heard about him or her and if yes, please tell, whether you perceive them positively or negatively."

Those who agree with the following statements:

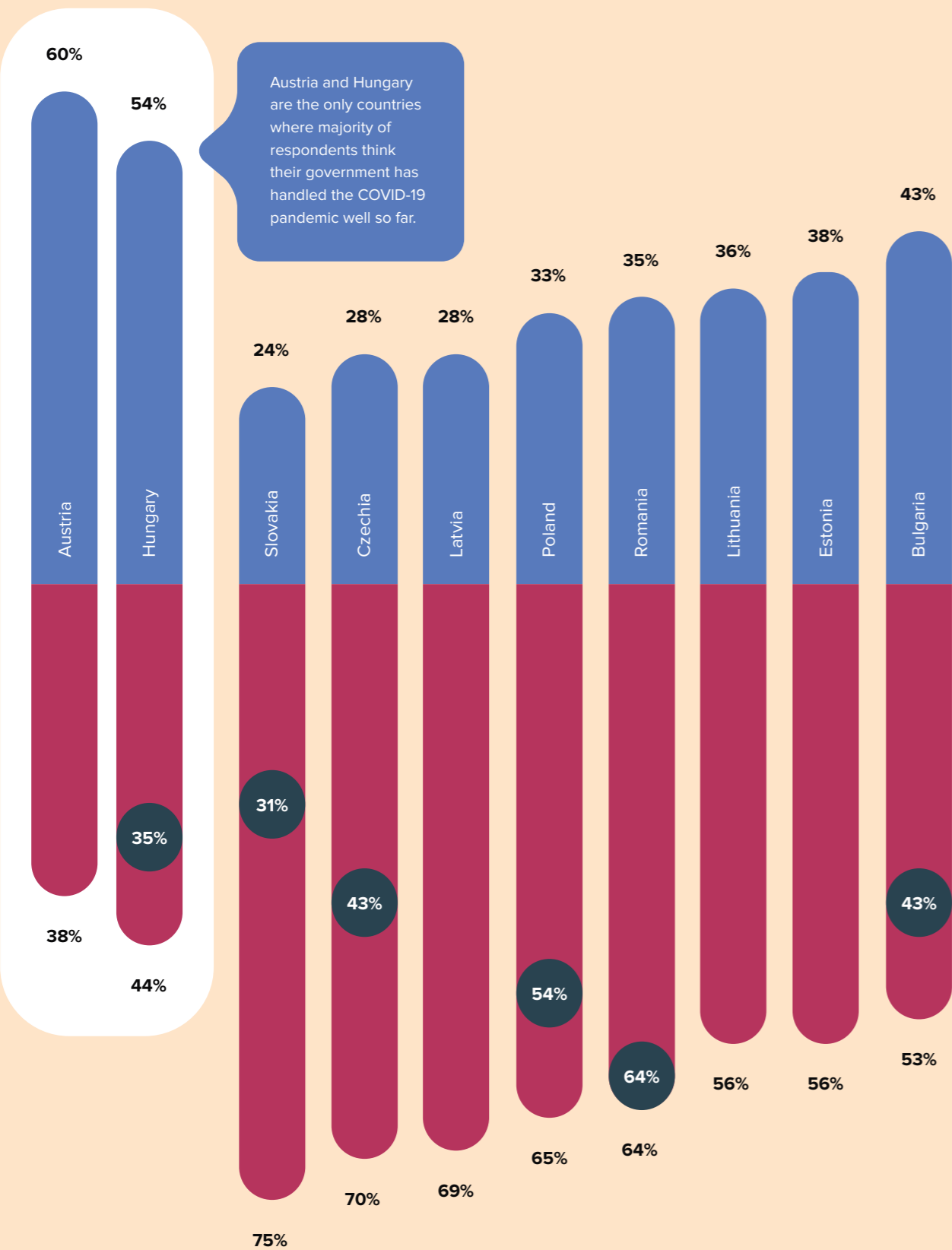
- EU should deal with the negotiation on buying the vaccines for us instead of our country's government
- EU should deal with the negotiation on buying the vaccines for us instead of our country's government while they perceive Ursula von der Leyen positively



How do you think your government has handled the COVID-19 crisis so far?

? Affirmative answers (“very well” and “fairly”) and negative answers of respondents (“not so well” and “very badly”) to the question: “How do you think your government has handled the COVID-19 crisis so far?” compared to negative answers of respondents to the same question based on a survey conducted in September/October 2020.

Well Badly Badly 2020



Perceived (in) competence and worries about impact

Elevated COVID-19 fatality rates during the second wave and sluggish vaccination rollouts contributed to greater negative sentiment among CEE respondents regarding the management of the pandemic by national governments.

In 8 of 10 countries, a majority of respondents judge their governments to have handled the pandemic badly. This critical view has soared since October 2020 in 5 of 6 countries, remaining stable at 64% in Romania. A 44-percentage point rise in dissatisfaction regarding how the national government has handled the COVID-19 pandemic was measured in Slovakia.

This ire is, in part, directed at concerns that COVID-19 measures adopted by national governments will result in long-term detrimental repercussions for fundamental rights and freedoms. While a majority agreed with this view in 7 of 10 surveyed countries, 60% of Estonians and 55% of Austrians disagreed.

“Prime Minister Andrej Babiš’s statement from last summer that Czechia is “best in COVID”³¹ became the subject of ridicule. Institutions responsible for handling the pandemic were not up to task - Czechia has gone through four ministers of health in the past year and the government has lacked a unified communication strategy. Some key politicians themselves, moreover, failed to adhere to measures.”

PSSI, Czechia

In 7 of 10 countries, a majority of respondents believe that COVID-19 measures will have a long-term detrimental impact on their rights and freedoms.

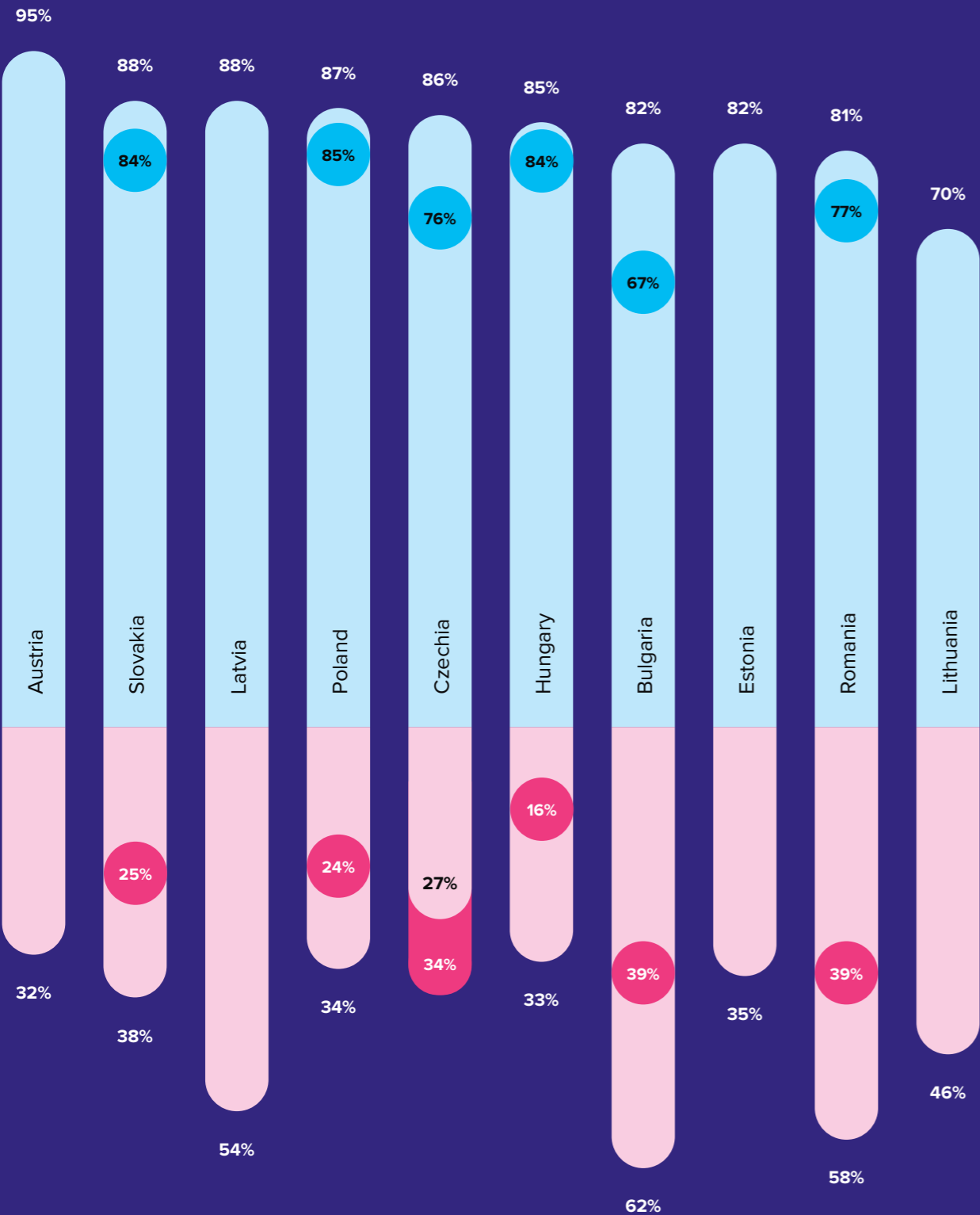
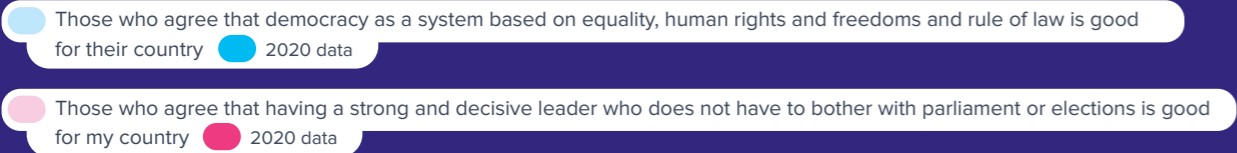
Democracy



While the path towards democratisation has varied for each of the surveyed countries, the COVID-19 pandemic and adopted lockdown measures have tested democratic checks and balances in the CEE region. Greater distrust towards many public institutions and expanded support for autocratic leadership are but two ramifications. These developments underscore the region's vulnerabilities including particularly the younger democracies of CEE. The democratic journey of the region continues a meandering path even 32 years following the fall of communism.

Which form of government is good for your country?

🔍 Affirmative answers (“definitely agree” and “rather agree”) of respondents from September/October 2020 and March 2021 to the statements: “Democracy as a system based on equality, human rights and freedoms and rule of law is good for my country” and “Having a strong and decisive leader who does not have to bother with parliament or elections is good for my country.”



A total of 8 in 10 people in the region judge democracy – defined as a system based on equality, human rights and freedoms and rule of law – to be good for their respective countries. That said, 42% of respondents are accommodative to autocratic governance, believing the model to be good for their countries. These latter attitudes have grown in 5 of 6 countries since October 2020 and are voiced by more than 50% of the population in Bulgaria, Romania and Latvia. Bulgarians, regionally, are most

accommodative towards autocratic governance, with 62% of respondents in the country professing that an autocratic leader could be good for their country (Romanians are just behind at 58%). Czechia stands on the reverse end of the spectrum, with only 27% expressing interest in autocratic leadership.

The COVID-19 pandemic, as noted in Freedom House’s Nations in Transition 2021 report, spurred numerous CEE leaders to exploit the moment to redefine democratic norms, with 6 of 9 analysed countries experienced a decline in their democracy scores.³² Poland and Hungary, notably, have recorded the most striking antidemocratic turns. A deterioration in democracy was, in fact, identified in five areas of the Freedom House democracy score for Hungary and six areas for Poland.³³

“Preference for a ‘strong and decisive leader’ is somewhat more common among supporters of the right-wing Freedom Party (FPÖ). The party sees itself on the rise again, receiving a positive reception among respondents who say that they will not vote in national elections and people susceptible to believing COVID-19-related conspiracy theories.”

Austrian Society for European Politics (OGfE), Austria

“The pandemic, coupled with growing political instability and social discontent against the current government, has increased support for far-right nationalist and one-personality-driven political parties. The party with the second-highest vote share is led by a populist comedy television host seen as a long-time critic of the political elite and promising a complete overhaul of the electoral system.”

Center for the Study of Democracy, Bulgaria

“The generalised sociopsychological profile of those, who prefer autocratic leaders, includes characteristics of fatigue from slow decision-making, unwillingness to note positives changes ensured by a proper democracy, inaccurate comparison of authoritarian achievements with domestic developments in Estonia, and susceptibility to populist narratives spread by some political parties. Demographics of those people refer to lower education and socioeconomically disadvantages.”

International Centre for Defence and Security, Estonia

“People tend to be willing to forgo democratic deliberation, which could risk slowing decision-making, in times of crises.”

Political Capital, Hungary

62% of Bulgarians think an autocratic leader could be good for their country.

While 42% of CEE respondents, on average, think having an autocratic leader is good for their country, such belief increases to 51% among those who perceive Putin positively and to 58% among those who consider the Chinese regime to be an inspiration for their country.

Strong autocratic leadership appealing to many

A strong link was identified between the belief that autocracy is a good form of governance on the one side and espousal of the idea that the Chinese regime could be a role model on the other. And a similar association was measured between the former and positive attitudes towards Russian President Vladimir Putin. Whereas 42% of CEE respondents, on average, think having a strong and decisive leader who needs not bother with parliament or elections is good for their country, the figure reaches 51% among those who perceive Putin positively and 58% among those who consider the Chinese regime to be an inspiration for their country. Throughout the pandemic, both the Kremlin and Beijing have waged extensive propaganda campaigns and used vaccine diplomacy to increase their spheres of influence in the region. These strategies, paired with the aforementioned growing openness to autocratic leadership, could pose a severe risk to the already declining democratic standards across CEE.



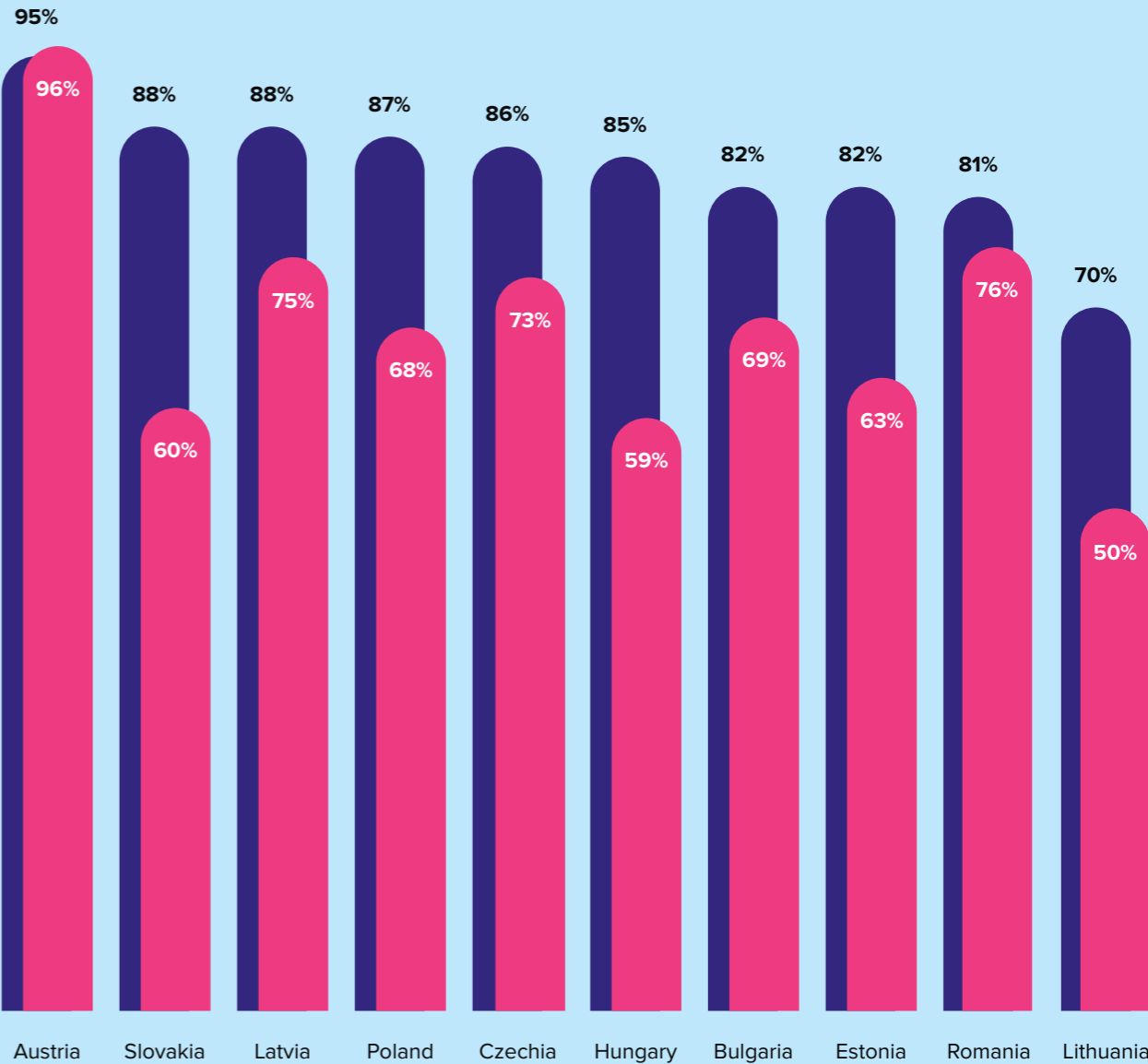
“At a fundamental level, this discrepancy appears to be tied to “othering”. Liberalism as an idea and a value system, moreover, has also endured constant attack from Russian-related campaigns in the media and elsewhere. These endeavours have left an impact on certain segments of Lithuanian society.”

*Eastern Europe
Studies Centre, Lithuania*

Democracy does not equate to liberal democracy

② Affirmative answers (“definitely agree” and “rather agree”) of respondents from September/October 2020 and March 2021 to the statements: “Democracy as a system based on equality, human rights and freedoms and rule of law is good for my country” and “Liberal democracy as a system based on equality, human rights and freedoms and rule of law is good for my country.”

- Those who agree that **democracy** as a system based on equality, human rights and freedoms and rule of law is good for their country
- Those who agree that **liberal democracy** as a system based on equality, human rights and freedoms and rule of law is good for their country



General backing of democracy is robust and growing across CEE when democracy is understood to be “a system based on equality, human rights and freedoms and rule of law”. Yet there are signs that liberalism has been “othered”, with identification of democracy as an ideal governance system plummeting by 15 percentage points (though still attracting 69% overall support) and seeing its buy-in

fade in 9 of 10 surveyed countries when the word “liberal” is added before democracy. Slovakia (28 percentage point disparity) and Hungary (26 percentage point disparity) particularly stand out.

The findings underline the rather declaratory and potentially shallow commitment to democratic principles among a considerable segment of

society prone to contradictory beliefs. An “anti-liberal” wave in the region has indeed been witnessed, which labelled liberalism as “perverted”, “decadent” and a threat to “national identities and traditional values”.³⁴

Media



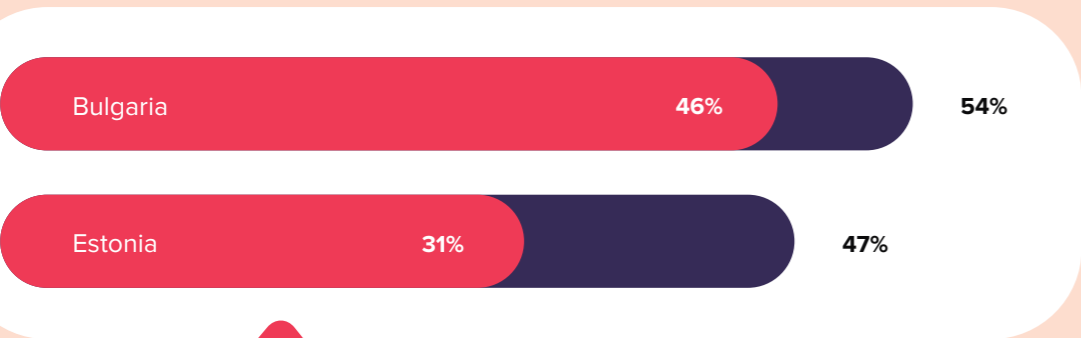
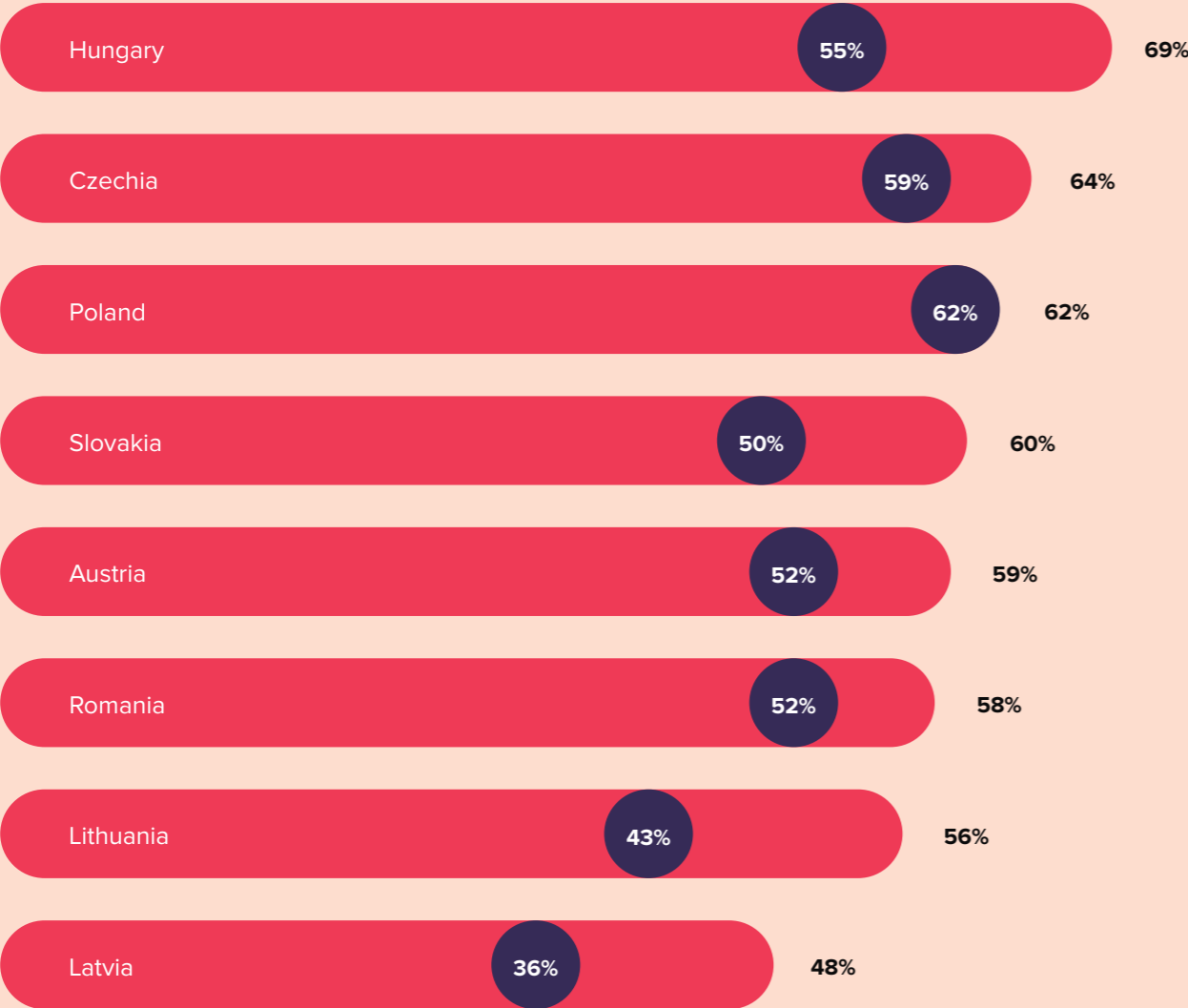
A flourishing and independent press landscape is vital for any vibrant democratic society. The World Press Freedom Index 2020, however, classified only one (Estonia) of 10 surveyed CEE countries as meeting the bar for a good media environment. The media climate was, nonetheless, evaluated as satisfactory in Austria, Latvia, Lithuania, Slovakia, Czechia and Romania³⁵. Three countries - Poland, Hungary and Bulgaria - were judged to have a problematic media environment according to the index.

The media in surveyed CEE countries, in addition to the challenges noted above, must also cope with pervasive distrust of their institution by vast majorities of the population.

Mistrust towards mainstream media

Mistrust was calculated as the percentage of respondents who responded to the question 'How much do you personally trust or distrust mainstream media in [your country]?' with (a) rather distrust or (b) completely distrust.

2021 2020



Bulgaria and Estonia are the only two countries in the region where the mistrust towards mainstream media decreased.

Distrust on the rise

In seven of ten surveyed countries, mistrust of the mainstream media increased by an average of 8 percentage points. Hungary, Czechia and Poland lead the chart, however, recording an average mistrust of 65% of respondents. This finding reflects the challenging media climate in each of these countries as the media struggles to maintain its independence in the face of government campaigns to extend control³⁶ and/or oligarchic media ownership³⁸.



"In Bulgaria, the increase in media trust can be attributed to a shift to foreign ownership of mainstream media outlets (BTV, Nova Media Group, etc...). Although not likely to prove a long-term trend, the change in attitudes could also be explained by the rising popularity of new independent media like Alternativata (The Alternative), the investigative reporting website Bivol and the stronger media market positions of pro-Western outlets such as the Economedia Group."

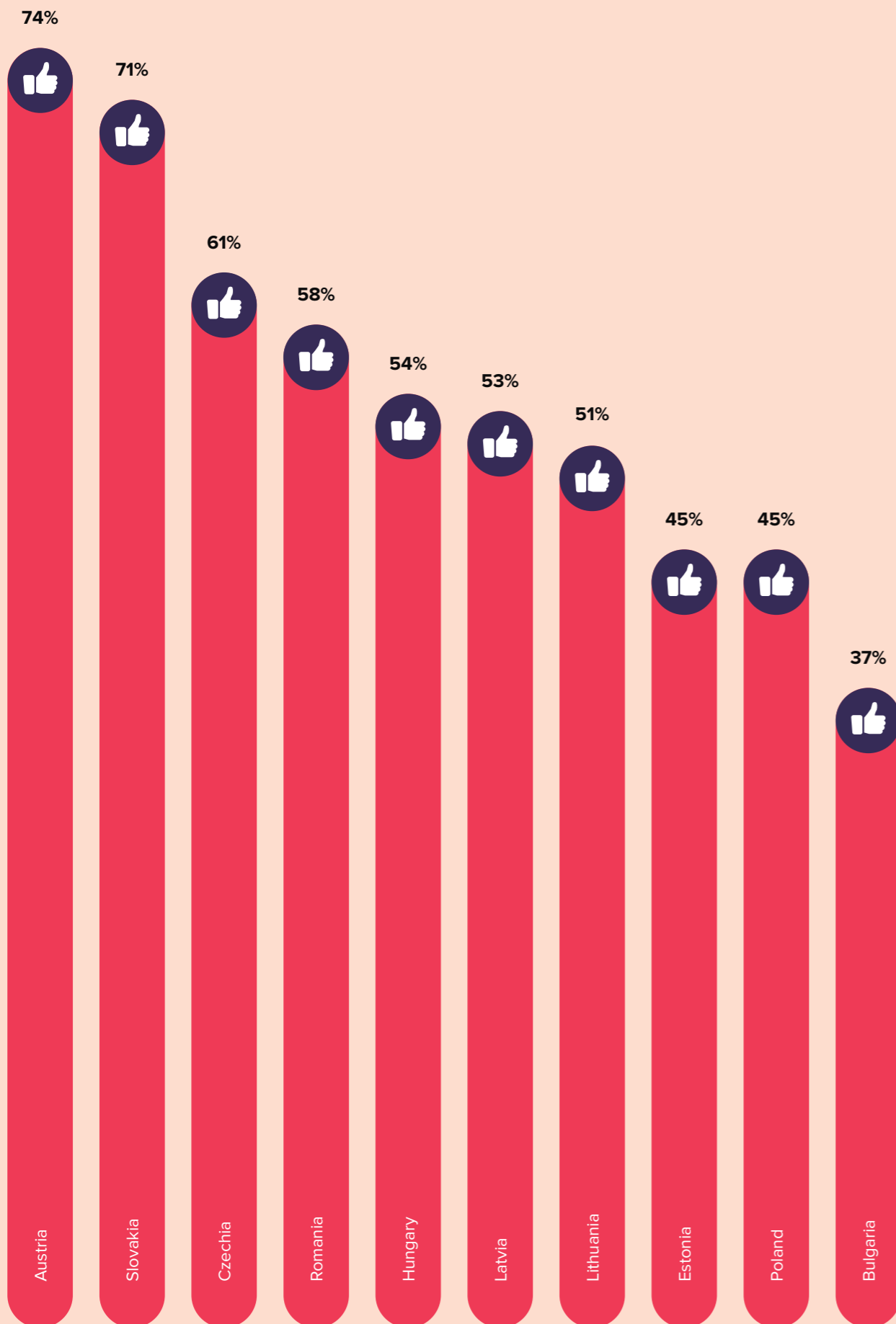
Center for the Study of Democracy, Bulgaria

Excluding Estonia, 58% of respondents in the countries lack trust in mainstream media, a concerning increase from 51% in March 2020.



Support for social media regulation

Social media companies (Facebook, Instagram, YouTube) should be more strictly regulated by laws and rules



Social media regulation

The regulation of digital platforms has become an important global issue, with unregulated digital spaces linked to numerous harmful phenomena including, among other problems, the proliferation of illegal content, hate speech, polarisation, radicalisation, private data leaks and cyber-bullying³⁸.

While the debate is gaining momentum at the EU level as exemplified in initiatives such as the European Democracy Action Plan³⁹ and the Digital Services Act⁴⁰, national laws that seek to establish rules for the digital space are also proliferating in both democratic⁴¹ and non-democratic countries⁴². There is no consensus, however, on the issue among the 10 surveyed CEE countries.



“In Austria, there is rampant criticism directed at tech giants for the alleged threat they pose to national and local economies and their role in accelerating globalization through their market power. People want the tech giants to be taxed fairly. Additionally, there is apprehension regarding the potential misuse of social media platforms to manipulate people, violate privacy and engage in intrusive personal data practices through ad tracking, personalised advertising and data disclosures to third parties.”

Austrian Society for European Politics (OGfE), Austria



“Several factors play into the low preference for social media regulation in Bulgaria. The Bulgarian social media space is particularly vulnerable to supporters of conspiracy theories who define it as the only place for “free speech”. Nationalist and pro-Kremlin parties are exploiting these vulnerabilities to influence decision-making and the functioning of democratic institutions. Traditional mainstream media has been captured by informal networks of influence close to the government, which has pushed the general audience to prefer social media channels that could allow many more alternative viewpoints. Furthermore, Bulgarians are simply unaware of social media regulation as a concept.”

Center for the Study of Democracy, Bulgaria

Keen to learn more about this topic?

To learn more about the topic of digital platforms' regulation, visit the webpage of GLOBSEC-led **Alliance for Healthy Infosphere**, established in summer 2020 as a reaction to the proliferation of hate speech and disinformation online. The Alliance advocates for a safe and just online information space for all with a particular focus on strengthening the voices of actors from smaller countries with unique languages which suffer from marginalisation and the lack of measures implemented in their countries.

Alliance for Healthy Infosphere

Our commentaries and policy papers can be found on our website

www.globsec.org

Connecting the dots

Trust is key to achieving herd immunity

Medical experts and leading scientific authorities are broadly trusted across all 10 CEE countries. Central and Eastern Europeans indeed express more confidence in these experts than their governments in managing the COVID-19 crisis. These findings underscore the fact that it could prove beneficial to make medical experts and scientists the public face of vaccination campaigns and serve as a voice of reason for people still contemplating the jab and/or open to various COVID-19 conspiracy theories.

Putting the spotlight on China

China's rising influence and growing involvement in the CEE region has largely advanced unnoticed, facilitated by a generally unaware public. Beijing's vaccine and mask diplomacy initiatives have, nevertheless, reinforced the view that the region cannot turn a blind eye to the country given the implications of its engagement. The violation of human rights and attempts by China to censor debates in CEE countries concerning this repression, nonetheless, could prove an opportune moment to augment general interest and awareness of influence operations orchestrated by Beijing.

EU champion

EU Commission President Ursula von der Leyen, a former physician, needs to make use of her positive image to implement changes in the EU vaccination strategy including the renegotiation of contracts and the setting of clear deadlines and delivery volume expectations for pharmaceutical companies. The aspiration to establish a health union encompassing a dedicated agency responsible for the EU procurement of medical supplies has been vocalised.⁴³ Clear and consistent communication on the part of EU leaders, like Ursula von der Leyen, is now needed to enhance citizen trust in the EU and provide a sense of stability.

Dismantling Kremlin mirage

Central and Eastern Europeans were unsettled by Alexei Navalny's poisoning and overwhelmingly oppose his imprisonment. This holds true even in countries, like Slovakia and Bulgaria, that have been consistently pro-Russian in the past. The Navalny case, in this regard, presents an opening through which the Kremlin's favourable image can be countered. Rising domestic discontent⁴⁴, repression of human rights⁴⁵ and the violation of democratic principles and Moscow's malign subversive acts in Europe need to gain more prominent coverage in the media and public discourse. Truth must be amplified over Kremlin propaganda and the voices of "useful idiots" in the CEE region.

COVID-19 nurturing autocratic tendencies

The perceived mismanagement of the COVID-19 pandemic and accompanying lockdown measures has been judged by many to be a violation of their rights and freedoms. These attitudes have contributed to growing openness to autocratic leaders in 5 of 6 CEE countries. Rising distrust in public institutions and dissatisfaction with democracy, furthermore, are steering some to anti-establishment political actors in the hope they may shake up the system. Democratic leaders should seek to overcome these proclivities by opening discussion to potential reforms and taking moves towards greater inclusion and participatory governance.

Opportunity for Joe Biden to rebuild relations with the EU

With a majority in the CEE region perceiving the US President Joe Biden positively, Washington has been awarded an opportunity to regain trust and revive its role in transatlantic cooperation. The Biden-Harris administration should make use of this favourable climate to strengthen ties with Central and Eastern Europe.

Credits & methodology

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Methodology

The outcomes and findings of this report are based on public opinion poll surveys carried out in March 2021 on a representative sample of the population in ten countries: Austria, Bulgaria, Czechia, Estonia, Hungary, Latvia, Lithuania, Poland, Romania and Slovakia. The surveys were conducted on a sample of 1000 respondents per country (10,000 respondents altogether) using stratified multistage random sampling in the form of computer-assisted telephone interviewing (CATI) due to COVID-19 pandemic restrictions. In all countries, the profiles of the respondents were representative of the country according to gender, age, education, place of residence and size of settlement. For the purposes of graphical data visualisation, the results were rounded to full numbers. To improve the readers' experience, the responses in closed questions with a scale were generalised. For example, a question with options definitely agree/ rather agree/ rather disagree /definitely disagree was merged to agree / disagree.

Terminology

Baltics: Estonia, Latvia, Lithuania
Visegrad Four / V4: Czechia, Hungary, Poland and Slovakia
CEE / Central and Eastern Europe: V4, Baltics, Romania, Bulgaria and Austria

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The opinion polling was conducted by the following agencies and coordinated by FOCUS, s.r.o. in Slovakia.

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Bulgaria: ALPHA RESEARCH Ltd.

Czechia: FOCUS - Centrum pro sociální a marketingovou analýzu, spol. s r.o.

Estonia: Turu Uuringute

Hungary: IMAS International Magyarország Kft.

Latvia: Latvian Facts

Lithuania: Vilmoris

Poland: IMAS International Sp. z o.o.

Romania: ISRA Center Marketing Research SRL

Slovakia: FOCUS - Centrum pre sociálnu a marketingovú analýzu, s.r.o.

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