

JANUARY 2014

## SAC

The Slovak Atlantic Commission (SAC) is an independent, non-partisan, non-governmental organization that has been giving Central Europe a powerful voice in the foreign policy debate for the past two decades. With the understanding that transnational challenges require international solutions, the Commission supports deeper regional, European and transatlantic cooperation on the basis of instrumental values, particularly democracy, individual liberty and the rule of law.

## CEPI

The Central European Policy Institute (CEPI) is a regional think-tank established and run by SAC based in Bratislava, Slovakia. Its mission is to help decision-makers and opinion-makers in Central Europe craft common responses to current challenges, and to improve the quality of their contributions to the Euro-Atlantic debates. It does so by engaging the region's top experts and institutions, promoting innovative solutions, and working closely with governments to turn recommendations into policy.

## POLLING MEMO

### EU REMAINS ATTRACTIVE BUT NOT A DEFAULT OPTION FOR MOLDOVANS

The Slovak Atlantic Commission (SAC), in cooperation with the Central European Policy Institute (CEPI), has commissioned a survey<sup>1</sup> about the attitudes of the Moldovans to the European Union (EU) and their perceptions of Moldova-EU and Moldova-Russia relations under the prism of value orientations.

The nation-wide representative survey<sup>2</sup> was conducted in Moldova between October 19 and 7 November 2013. The survey was carried out by Professor Elena Korosteleva from the Global Europe Centre, University of Kent, in collaboration with the Independent Sociological and Information Service "Opinia".

For those interested in further analysis, the entire data set, including cross-tabs, is available [here](#). The findings are compared with a similar survey undertaken by the same team in 2009.<sup>3</sup>

### KEY FINDINGS

Public support of the EU and its policies has slightly eroded, which is reflected in the respondents' perceptions, levels of interest, attitudes and behavioural preferences. The EU remains attractive for Moldova - but is not a default option yet. It requires

continuous reinforcement: the fear of uncertainty and negative anticipations of change currently prevail in public perceptions of the EU, causing a loss of trust, and reciprocity in EU-Moldova relations. The Eurasian Customs Union (ECU), on the contrary, tends to be seen as a model which may potentially offer a quick-fix solution for stability, prosperity and security.

There is an actualising sense of rivalry between the ECU and the EU, with public opinion explicitly divided between the two regional power centres. This is particularly important given that Russia and the ECU continue to garner substantial public support in the country while the EU's support is dwindling. Despite the growing levels of awareness and intensified travel to the EU, signs of disenchantment begin to surface. They reflect slowly changing predispositions towards the EU in the levels of interest, trust, emotional associations and the nature of partnership with the EU.

Being asked to choose only one option between support for the EU or the ECU, a slight majority of the respondents (44%) preferred the EU over the ECU (40%). However, if the respondents are suggested to pick between three options: EU, ECU, or cooperation with both polities, about a third would choose



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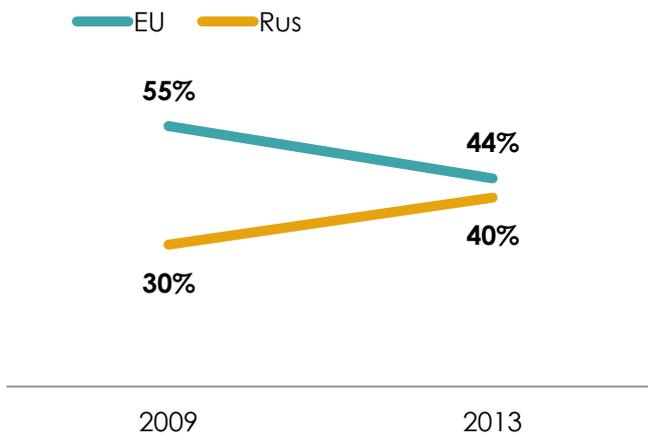


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cooperation with both polities; while 36% (+17) would support the ECU and 32% (-1) the EU. The preference for the EU is still dominant but less clear-cut.

**If you had to choose between the union with EU or Russia, what would you choose?**



Europhiles still outweigh the euro-skeptics, but since 2009 their number has slightly decreased. Every second respondent believes that the EU is interested in developing closer links with Moldova. Yet, in the opinion of a great share of Moldovans closer cooperation corresponds with the interests of the EU (35%) rather than those of Moldova (25%).

In the population's self-esteem there is a feeling of inferiority in comparison with EU countries. Two out of five respondents (42.6%) believe that the EU perceives Moldova as a second-class partner. Although in the opinion of respondents the EU sees their country predominantly in positive terms as friendly (90%), peaceful (87%), partner (81%), open (73%), spiritual (72%), democratic (64%), important (55%), independent (52%), there is also an increasing discernment that Moldova is being perceived as a 'laggard' (76%; +7), an unlawful (52%; +17) and a weak country (82%; +4).

This points to a significant shift from where Moldova was four years ago – a highly enthusiastic, pioneering and committed follower of the EU – to becoming a rather disillusioned recipient of the EU directives, where only a third of the respondents believe that the chosen direction is the right one to follow.

The ECU is seen as a significant and legitimate contender for the EU's appeal in the country. This becomes particularly relevant in the situation of eroding cultural identity for the Moldovans. This signals changing normative preferences, but also renders propitious grounds for social re-engineering – an important opportunity requiring careful but timely and intense engagement with the public in order to foster a new normative basis and public legitimacy. This is a process, which could take any directions, and points to the window of opportunity for the external actors to contribute to shaping a new identity for the country.

As a matter of analysis CEPI holds that the gradual erosion of public preferences of the EU during the past four-year period includes dissatisfaction with the pro-European ruling coalition as the strongest factor. Expectations of Moldovans from strengthening European integration efforts in 2009 were very high, especially in comparison with other countries of the Eastern Partnership (EaP). Lack of tangible progress has been coupled with economic hardship and high unemployment rates.

At the same time, Moldovan citizens have limited knowledge, and therefore understanding and patience, of what reforms would bring. Public opinion does not connect pro-EU efforts with modernization of the country, but it rather sees it as a precondition to get visas and work permits. Part of this change of attitude comes with the growing notion that Moldova is perceived as a secondary nation, as well as in response to the continuing euro-zone (and EU institutional) crisis.

Drop in support of the EU is also attributed to the shift on the side of the Party of Communists (PCRM): a number of Moldovans supported the EU earlier on because of the PCRM, which – while in power – was pro-European (support of the EU then was as high as 70%); however, the party is now leaning toward "Eurasia".

## DETAILED FINDINGS

### Public perceptions of and attitudes to the EU: euro-optimism vs. euro-skepticism



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Analysis of public surveys undertaken in 2009 and 2013 points to gradual erosion of public preferences for and positive perceptions of the EU during the four-year period.

There are two noticeable trends in particular: on the one hand, the levels of public awareness about the EU as a polity have positively grown (98%, +2) to facilitate a more discernible understanding of EU structures, institutions and policies. Respondents display high levels of cognizance of the EU as organisation (71%); and its policies: every sixth respondent could correctly identify partner countries under the Eastern Partnership (EaP), and their variable levels of engagement with the EU; every second respondent is aware about the Association Agreement (50%), which the EU and Moldova have now initialled; and every third had heard about the Neighbourhood Policy (40%; +7) and the DCFTA (35%). A third (36%) of those who had heard about the DCFTA, defines it as a 'process of trade liberalisation'.

At the same time, the respondents seem to be less interested in the EU (67%; -5) as juxtaposed with a higher degree of attention to Moldova-Russian relations (80%; +4). Many point to the general decline in EU relations with the region (59%; -20); however the EU-Moldovan relations continue to be viewed as stable (69%). The importance of the EU as a partner retains its value (64%), which is nevertheless similar to the perception of the importance of partnership with the ECU (62%). The ECU however leads in the perception of shared values, which the respondents

believe to be part of the relationship with the ECU and the EU respectively (62% vs. 44%).

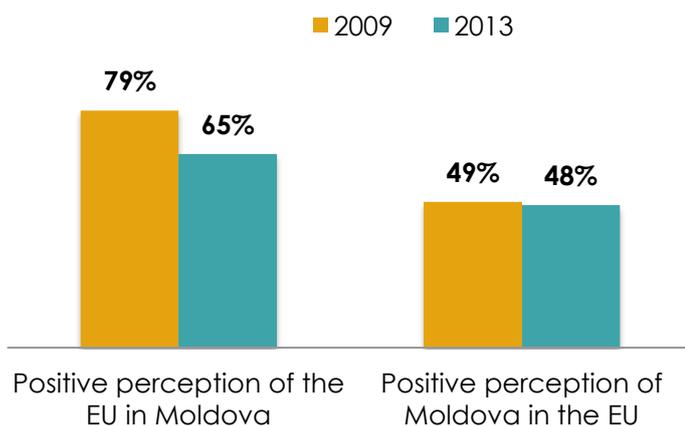
A lingering sense of disillusionment is beginning to manifest in the perceptions of the EU: although the majority is still positively predisposed to the EU (65%), this view has nevertheless declined by 14% since 2009. Among the respondents there is a prevailing belief of a closer relationship that will end in Moldova's accession to the EU (47%). Yet, the EU-Moldovan relations are increasingly viewed as favouring more EU interests (35%; +14) than those of Moldova (25%; -9).

There is more skepticism emerging among population regarding the notion of EU perception by Moldova and vice versa. The number of those who believe that the EU is perceived positively by Moldovan society significantly decreased compared with four years ago (65%, -14). On the other hand, the negative perception of the EU – while still four times lower – has increased since 2009 (15%, +8). The appearance of a positive perception of Moldova by the EU remained at the same level (48%) and is twice as high as the negative set (25%).

There is an increasing discernment that Moldova is being perceived as a 'laggard' (45%; +7); 'dependent' (46%; +4); 'undemocratic' (34%; +4); 'unlawful' (52%; +17) and 'weak' (82%; +4) country. Furthermore, a greater share of the respondents now believes that Moldovans are treated as 'second-class' citizens (43%; +6), which in conjunction with the growing number of those who are no longer convinced that relations with the EU serve Moldovan interests, form strong foundations for the rise of euro-scepticism.

Although the EU continues to associate with the feelings of 'faith' (22%; +10) and 'enthusiasm' (14%; +4), there is also a noticeable rise in public 'distrust' (20%; +15), 'anxiety' (19%; +15), 'indifference' (13%; +3) and loss of 'hope' (47%; -4).

### Assessment of perception of EU in MD and MD in EU in the eyes of Moldovans



### Moldova-EU relations under the EaP: perceptions, ambitions and values

The afore-mentioned critical trend in general public attitudes towards the EU is being further detected when focusing more specifically on the EU-Moldovan

relations under the EaP. In particular, although respondents generally note that the EaP relations continue to be premised on common political, economic, security and legal interests (on average 52%; -3), a gradual loss of trust in the EU-Moldovan relations under the EaP is also observable: if in 2009 84% of the respondents believed that the EaP was founded on mutual trust, by 2013 this number has fallen to 61% (-23). On a positive side, however, there is a continued understanding that the EaP serves both the interests of the EU (69%; +10), the Moldovan government (48%; +10) and its citizens (42%; +17). In relational terms, however, as indicated in the previous section, the interests of the EU are perceived as domineering.

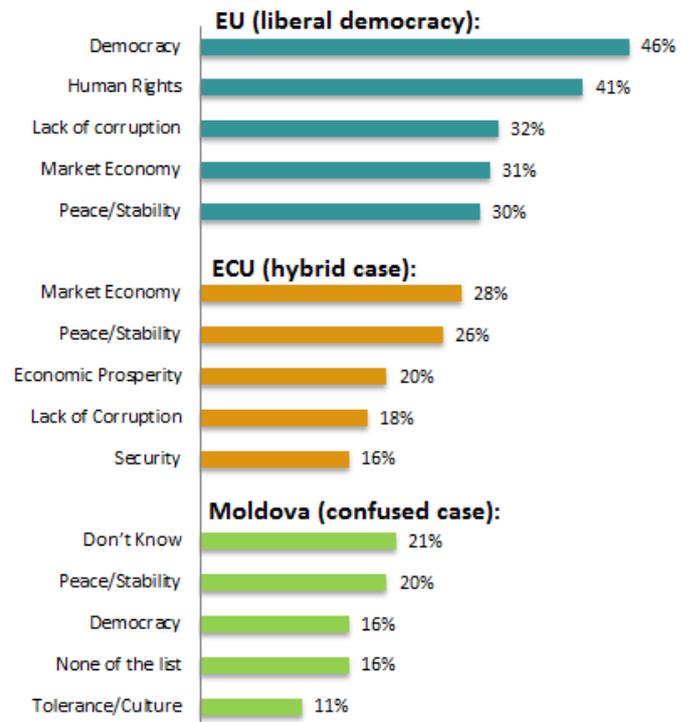
Current arrangements under the EaP are seen as 'more talks than actions' (42%), indicating slow pace of convergence with the EU (33%). Economic cooperation (43%; +16); trade (41%; +23); student exchange (31%; +14) and cross-border cooperation (29%; +10) are regarded as more effective forms of cooperation with the EU. Considering all negative externalities, 47% of the respondents still strongly believe that by 2015-2020 their country will become a member of the EU.

There is also a positive correlation between the issues that the Moldovan respondents find most pressing including corruption (30%); employment/pension provisions (20%) and living costs (17%), and where they believe the EU might help. This is, however, offset by similar expectations from the ECU, with more weight attached to trade relations (47%).

The majority of respondents believe that Moldova has more shared values to facilitate cooperation with the ECU (62%) than with the EU (44%). Meanwhile EU values pattern is the most defined, whereas the values associated with the ECU are less outlined, and the values associated with Moldova are hardly outlined at all.

Temporal comparison of public normative beliefs indicates no change in value patterns associated with the EU and the Russia-led ECU. In particular, the EU is determinedly associated with a liberal democracy model, premised on the values of democracy, human rights, lack of corruption, and market economy. As

### Values associated with the EU, ECU and Moldova



cross-comparison between 2009 and 2013 indicates, this model is rather enduring. A model the respondents come to associate with the ECU, offers a mix of qualities, a hybrid case, which could be referred as a mix of liberal and a social democratic model. Normative confusion emerges amongst the respondents in relation to the values they attribute to their own country. If in 2009 the model was relatively clear, referring mainly to the values of peace (51%); democracy (34%), respect for different religions and cultures (25%), tolerance (24%), and human rights (23%); by 2013 public normative associations have become significantly eroded. One of five respondents (21%) fails to identify any definitive set of values with their own country; and one of six rejects all listed values altogether. There is some reference to peace/stability (20%; -31) and democracy (16%; -18), as well as tolerance and culture (11%; -9), which have significantly eroded since 2009.

Thoughts on the implications of signing the Association Agreement with the EU are split. For instance, trade with the EU is expected to grow (62%); which is however outweighed by a series of



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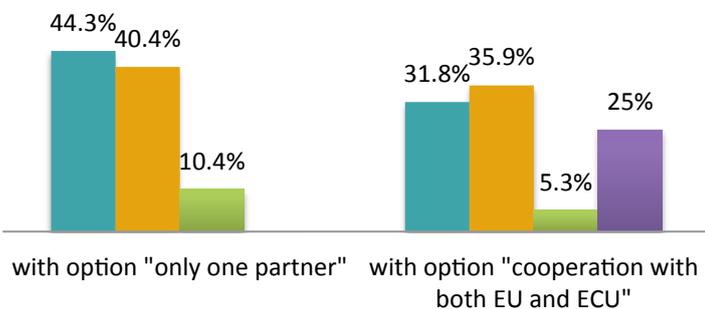
negative concerns including rising living costs (62%) and a rising pressure from Russia (56%). Opinions become seriously divided in relation to mobility, which some believe would increase (44%), but others anticipate more EU control and meddling (43%); education provisions are expected to improve (49%), which may be countered by the increasing costs of education (38%); economic prosperity might rise (45%), which many anticipate may coincide with rising costs of reforms and higher levels of unemployment (42%); political stability might be enhanced (49%), which may be counteracted by rising uncertainty (37%); corruption might be reduced (46%), which some concede is more likely to take a latent form (41%); independence of judiciary might be achieved (43%), but a similar proportion of respondents believe these reforms would only be 'on paper' and cosmetic (43%); and the Transdnistrian conflict would not be resolved (54%).

**Moldova-Russia relations, including perceptions of and attitudes to the ECU**

Although the respondents generally retain their preferential attitudes towards the EU, Russia and the ECU nevertheless continue to garner substantial public support in the country.

**If a referendum about Moldova's future were held tomorrow, how would you vote in it?**

■ EU ■ ECU ■ d/k ■ ECU and EU



Despite being newly launched (2010), the ECU commands a relatively high levels of awareness (85%) and interest (67%), being further reinforced by 80% interest in Russia as well. The majority of the respondents see the ECU as equally effective as the EU in addressing some pressing issues of trade, economic reforms and employment in the country.

Both the EU (64%) and the ECU (62%) are competing to be perceived as important strategic partners in the eyes of the respondents.

The differences become apparent when the two regional powers are juxtaposed. In particular, although the overwhelming majority of the respondents believe that the Transdnistrian conflict is an obstacle for Moldova's reforms, with less than a third being convinced that the EU and Russia could work in partnership to resolve the conflict. Conversely, a plurality (37%) of the respondents insist that the EU and Russia are rivals in the eastern region, and would not be able to jointly offer an accommodating solution to the conflict. Partnership with the ECU (37%) is seen as a slightly more beneficial for the country to that with the EU (26%), especially in terms of ensuring trade and employment.

Furthermore, if a referendum were to take place tomorrow, the opinions within the country would be seriously divided: 36% (+17) would support more cooperation with the ECU; 32% (-1) with the EU; and another 25% would prefer cooperation with both. However, when the respondents were pressed further to choose between the adherences to the ECU or the EU only, a slight majority (44%; -11) would still prefer the EU over the ECU (40%).

This is further reflected in public preferences and support for the country's foreign policy. Many interviewees note that although balancing between the two regional powers is a preferred option (31%), this may not be sustainable. A steady proportion (46%) of the respondents approves of their country's foreign policy; however, a slight majority also report their disagreement with the chosen direction (54%). These opinions explicitly underscore internal disagreements within the society, signalled by a considerably eroded sense of their own identity. They are also a reflection of a deeper public understanding and awareness of Moldova's challenges and complex policy priorities for the future.



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1 The survey is commissioned by the Slovak Atlantic Commission (SAC) for the 'Widening the European Dialogue in Moldova' project, implemented in cooperation with the Central European Policy Institute (CEPI) with the kind financial support of SlovakAid.

2 The representative sample of 1000 respondents was multi-staged, stratified, and random, selection of the population aged 18+ (urban and rural) by nationality, sex, region, age and education. The municipality Bender and districts situated on the left side of river Dnestr (Transdnistria) were excluded from the universe due to the political and security situation – an approximate proportion of the excluded population is 13%. The sample representation error was no more than  $\pm 3\%$ . The survey included 15% random quality control on completion, undertaken by Professor Korosteleva.

3 The survey field work was undertaken by Professor Korosteleva in January 2009, as part of the ESRC grant (RES-061-25-0001). A synopsis of the findings is available at: <http://www.aber.ac.uk/en/interpol/research/research-projects/europeanising-securing-outsiders/researchfindings/>.

*This polling memo is released as a part of the 'Widening the European Dialogue in Moldova' project implemented by the Slovak Atlantic Commission (SAC) with the assistance of its think-tank the Central European Policy Institute (CEPI). It has the ambition to contribute to the efforts aimed at increasing public support for EU integration in Moldova, particularly utilizing Central Europe's recent experience with the EU integration process. The project was financially supported by SlovakAid.*

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Disclaimer: The views and opinions expressed herein do not necessarily reflect those of the project's supporters or partners.