

GLOBSEC TRENDS 2023

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EXECUTIVE SUMMARY

As Russia's aggression against Ukraine wages on for a second year, most of Central and Eastern Europe (CEE) finds itself on the right side of history. Public opinion saw a substantial shift in 2022 towards greater support for EU and NATO membership, as well as coming into terms with the dangers posed by autocracies to the region's security. These views remain largely unchallenged. Most CEE societies are taking cue from their political leaders that have sought to openly distance themselves from autocratic regimes and assume a more decisive and vocal role on the international scene.

At the same time, a strong buy-in to manipulative narratives that undermine democracy and Western unity constitutes a major

obstacle to preserving progress. CEE societies are still greatly vulnerable to economic and social turmoil, a dynamic intensified over the past several years by the COVID-19 pandemic and Russia's aggression. While this turbulence has revealed vulnerabilities and blind spots that need addressing, it has also invited introspection towards examining the factors fostering societal resilience.

Russia's belligerency is being fought across multiple parallel battlefields including the information space. Although political will is necessary to take effective measures and establish a commitment to resilience building, all parts of society, including the private sector, have a role to play.

GLOBSEC TRENDS 2023 SHINES A LIGHT ON THE FRUSTRATIONS AND UNCERTAINTIES THAT LIE HIDDEN UNDERNEATH THE SURFACE THAT CAN BE FURTHER EXPLOITED BY (PRO-)KREMLIN AND ANTI-WESTERN PROPAGANDA, FACILITATED BY POPULISTS THROUGHOUT THE CEE REGION.

THESE ARE OUR KEY FINDINGS



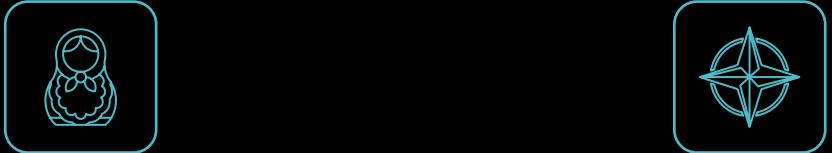
Russia still perceived to be a threat

Russia is considered to be the main threat facing the region, jeopardising the security, identity, and values of CEE countries. The attitudes are mirrored in the fact that the region overwhelmingly blames Russia for the war.



Security rising in importance

Recognition of the paramount role of the US as a strategic partner and a guarantor of security in the region has surged substantially since 2022, indicating that defence and security issues have regained their status as top priorities for societies.



Relying on NATO collective defence

Support for NATO membership remains undisputed across the region. This belief is also reflected in the expressed willingness of the public to step in to defend their NATO allies and neighbours if attacked.



The truth trumps lies

CEE publics are more inclined towards believing facts related to Russia's invasion of Ukraine than fabrications and lies. An overwhelming majority supports Ukraine in its fight for democracy and most are also willing to lend a helping hand to refugees. A substantial segment of the population, however, displays insecurities and dichotomies in simultaneously believing true and false narratives.



Economic sanctions find support

In most countries, public attitudes indicate support for sanctions against Russia and positive sentiment concerning their effectiveness. This stamp of approval comes despite continued efforts from both foreign and domestic actors to undermine the sanctions.



Agreement on democracy

Support for democracy as a system of governance remains uncontested throughout the region. But anxieties, fuelled by the COVID-19 pandemic, Russia's aggression, and domestic political battles, are contributing to low levels of trust in public institutions. At the same time, while support for human rights as a general concept is resolute, majority backing for LGBTI+ rights specifically is lacking in 4 of 8 countries.



China still underestimated

Most CEE respondents still do not perceive China to be a security threat and are rather ignorant about its increasing influence in the region. Only a third consider China to be a threat to their national security and/or to their values.



Media trust matters

The media play an important role in building societal resilience and strengthening democracies. People who trust the mainstream media are substantially more likely to blame Russia for the war in Ukraine than their peers who distrust these outlets. Trust in the media, investigative journalism and factual information are, to this end, key determinants to winning the continuous battle over narratives, including but not limited to Russia's invasion of Ukraine.

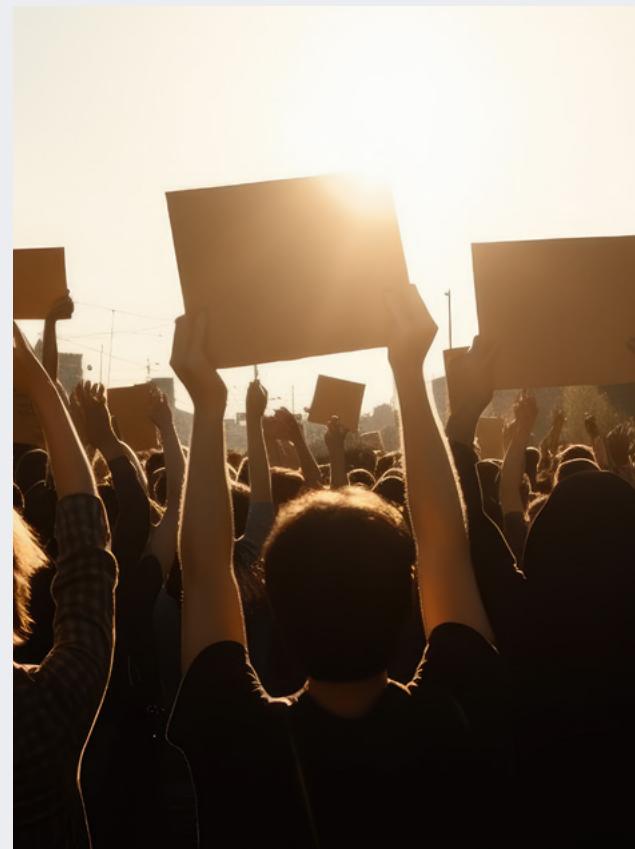
RECOMMENDATIONS

CEE countries are at the core of the EU and NATO and have been integral to shaping the responses of the two organisations to Kremlin expansionism in Ukraine and foreign malign influence across the region. However, malicious foreign and domestic actors never rest in their efforts to undermine our democratic principles. The following recommendations are directed at various stakeholders with the aim of helping CEE democracies defend themselves against these efforts.

1

Look beyond political leadership

Public opinion often fails to reflect the positions of political leaders, though the direction of these discrepancies can vary. In countries where support for Ukraine or Western unity is undercut and exploited by politicians to polarise societies, opinions are often split along political party lines. More attention should, therefore, be paid to identifying the actors responsible for diminishing trust in specific communities and subsequently elevating those capable of reviving this trust. The latter may include community leaders, NGOs, and businesses involved in various initiatives at the regional or local level.



3

Expand defensive measures

Democratic countries need to defend themselves more actively. Numerous CEE countries have deployed various tools at their disposal to deter malign actors seeking to undermine their democratic processes or citizen trust. From taking down pro-Kremlin sources and penalising actors spreading war propaganda to effectively utilising already existing laws to punish perpetrators, CEE countries, Ukraine, Georgia, or Moldova all offer numerous best practices at the national, regional, and local levels. These lessons learned should be shared and their replicability and scalability tested, while the exchange of know-how and best practices should be intensified internationally.

4

Understand different perceptions of democracy

While CEE publics resolutely support democracy and recognise its benefits, stark differences are apparent regarding trust in institutions and LGBTI+ rights. This divergence underscores the fact that expectations from and perceptions of democracy can vary considerably. More resources should, therefore, be invested in understanding these expectations and perceptions in different communities to better tailor policies and communication strategies and start reviving trust in institutions.

2

Keep Ukraine in the spotlight

An overwhelming majority in the CEE region indicate support for Ukraine and back Europe's military assistance and humanitarian aid to Kyiv. But every crisis or war, however horrific, tends to fade away in the public consciousness as people move on with their daily lives. This is especially true if the crisis does not directly impact society. While the importance of Western support is still recognised by most, it is necessary to continue reminding people of this fact via public statements, state visits, face-to-face interactions, events, and other efforts and initiatives.

5

Values do not pay energy bills

During energy crises or periods of steep inflation, values-based appeals fail to resonate among people struggling to pay the bills. While values-based strategic communication can be a key ingredient to promoting public unity and fostering trust in democracy, targeted policies and pre-emptive communication about threats and crises can limit uncertainty. The turbulent winter of 2022-2023 and the COVID-19 pandemic both provide several lessons on the importance of pre-emptive, unified, and consistent communication, in consort with preventive policy-making, in helping alleviate insecurities and anxieties in society.



6

Keep the momentum going

The attitude shift that occurred in 2022 following the Russian invasion of Ukraine mostly continues to hold – trust in NATO is high, Russia is widely perceived to be a threat, and defence and security are considered among the top priorities for CEE countries. This consensus should be seized to the fullest by public authorities to implement policies that will strengthen societal resilience and better prepare citizens for future crises and security threats. This includes bolstering civil defence and widely disseminating practical information aimed at preparing citizens for potential conflicts.

7

Put more emphasis on collective defence

Alongside a strong support for NATO membership, a significant majority of respondents in CEE affirm their willingness to come to the aid of neighboring NATO members in the event of an attack. These attitudes demonstrate the broad societal commitment to ensuring collective security. In response, both NATO and national representatives should enhance their communication efforts by emphasising collective defence and the mutual assurances shared among NATO allies. It is crucial to consistently highlight the defensive nature of NATO in order to counter prevailing narratives that falsely depict the Alliance as having offensive intentions. By doing so, NATO and its member states can effectively address concerns and bolster public confidence in the Alliance's security commitments.

8

Combat healthcare disinformation now

While healthcare-related issues no longer dominate agendas, a considerable share of the CEE population has bought into erroneous information on public health issues. This dynamic has created a sizeable market for alternative medicine peddlers. While public health is not currently being used to score political points, it is the right time for government institutions and private companies to take action to regain people's trust in this sphere. Corrective action should include public campaigns and the amplification of information about safety and assessment standards applied towards pharmaceutical companies. More transparency about product development is also needed.



9

Focus on long-term solutions

Those countries indicating higher long-term susceptibility towards believing disinformation are more difficult to work with during crises - they rather tend to quickly fall prey to manipulative narratives, as underscored by Bulgaria, Slovakia, and Romania. There are no quick fixes to tackle the deep-rooted societal and historical issues contributing to these predispositions. More programmes should focus on long-term solutions aimed at normative change, including education and cross-sectoral resilience-building. Long-term strategies and a future-oriented vision will also help unite societies behind promising causes and foster trust.

10

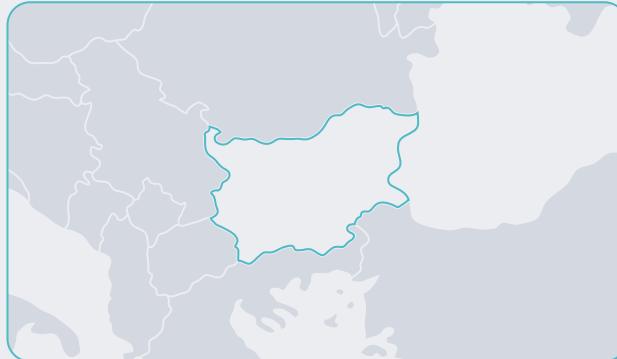
Strengthen in-person presence

Manipulative narratives primarily originate from online sources in most countries. Social media networks provide a platform where polarising debates typically take place, enabling the radicalisation and/or further fragmentation of society into information bubbles that are difficult to permeate and counter in a comprehensive manner. As a key preventive measure, political leaders should organise considerably more in-person meetings and events, especially in rural areas. While it may prove time consuming and difficult to orchestrate, in-person engagement, especially on contentious issues, can be refreshing to citizens and help build mutual trust.

COUNTRIES IN THE SPOTLIGHTS



BULGARIA: AT THE CROSSROADS



Bulgaria's long cultural and historical ties with Russia, combined with Kremlin influence operations targeted at the country, are proving difficult to shake off. **Russia is still considered to be a strategic partner by around one-fourth of Bulgarians.** That said, there has been a discernible public shift towards more pro-Western attitudes over the past year as well. Bulgarian backing for NATO membership increased from 50% in 2022 to 58% in 2023. The rise, however, still leaves Bulgarians among the least likely to support Alliance membership among countries surveyed.

At the same time, elevated corruption, state capture, and years of instability, compounded by the COVID-19 pandemic, and a struggle of several consecutive governments to secure votes of confidence have contributed to **Low trust in public institutions and the media.** In a country susceptible to believing disinformation narratives, this trust will be difficult to rekindle.



CZECHIA: ON THE RIGHT TRACK



Czechia is **one of the most pro-NATO, pro-Ukraine, and pro-democracy countries** in the region, a finding borne out by parliamentary and presidential election results over the past two years. Czechs broadly recognise NATO's benefits, with 78% of respondents agreeing that Alliance membership reduces the risk that a foreign country will attack them and 91% indicating their willingness to go to war to defend a neighbour in the event of an attack.

Czechs are also among the **Least vulnerable to manipulative narratives, especially related to values and democracy.** The public resoundingly supports LGBTI+ rights and the trust in their government (52%) and the newly elected president (72%) is the highest in the region. Paradoxically, only 53% of respondents express confidence in the mainstream media, whereas 72% consider their media to be rather or completely free, the highest figure among countries surveyed.



HUNGARY: MORE DYNAMIC THAN IT MAY SEEM



Hungarians reject many of the values-based manipulative narratives propagated by its ruling government. **A majority, for example, believe that the rights of LGBTI+ people should be guaranteed** despite years of government efforts to restrict them. Unfortunately, the Hungarian government's persistent campaigns, often in line with Kremlin rhetoric, have left their mark on Hungarian society too. The public remains more reluctant than their peers in most other CEE countries to blame Russia for the war or to deem Russia a security threat.

State-controlled media outlets have played an important role in shaping these views. While in most countries, people who trust the mainstream media were more likely to fault Russia for the war, in Hungary, the situation was the exact opposite. Hungarian opposition supporters, who tend to distrust mainstream media outlets, rather espouse more unfavourable views of Moscow. **Overall, media trust among Hungarians stands at a mere 27%.**



LATVIA: GRADUALLY CHANGING



For a second consecutive year, **Latvian respondents indicate more robust support for Western alliances and greater opposition to Russia.** In fact, this year, Latvia's Russian minority, which constitutes 25% of the country's population and had previously been more reluctant to pass judgement on Russia, appears to be on board with this shift. 78% of Latvian respondents now agree that their country is helping Ukraine defend itself against Russia by providing military equipment and weapons to Ukraine. Meanwhile, 82% support assistance for refugees and a similar percentage want their country to stay in NATO.

The change in attitudes in terms of the greater emphasis placed on the country's security is underscored also in relation to Washington DC – **63% now consider the US to be a strategic partner,** a significant uptick from 36% in 2021 and 44% in 2022. Respondents in Latvia also give higher than average trust ratings to their media and government.



LITHUANIA: RUSSIA AND CHINA ON THE RADAR



Respondents from Lithuania, for their part, are among **the staunchest supporters of NATO and EU membership for a second consecutive year**. The population also remains strongly cognisant of the threat that Russia poses to their security, values, and identity. Public support stands at around 85% for membership in both institutions and Russian threat awareness at around 80%, among the highest in the region.

An ongoing diplomatic dispute with China over Taiwan has seen Lithuania become one of two countries in the region where a majority, 51%, perceive China to be a security threat. Nearly two-thirds of respondents view Xi Jinping negatively, with only 10% holding a favourable opinion of the Chinese president.

Despite their strong resilience to geopolitical disinformation, **Lithuanian society appears more vulnerable to values-based polarising narratives**. Numerous respondents, for instance, bought into disinformation connected to the LGBTI+ community and disagreed with guaranteeing their rights.



POLAND: CLEAR GEOPOLITICAL LEADER



EU and NATO membership, as well as collective defence, are widely supported by Polish respondents - 92% are willing to help their NATO allies defend themselves in the event of an attack. Most Poles also identify Russia as a threat and support sanctions against Russia and military assistance to Ukraine (the highest in the region). However, manipulative narratives about the war also find resonance among Poles - 52% agree that the assistance Ukrainian refugees are receiving is coming at the expense of socially vulnerable Poles who need it more. Openness to these narratives could underscore certain societal frustrations and fears bubbling under the surface.

At the same time, **a majority still distrusts the media, with respondents citing government control as the primary reason** for their sceptical views. But in contrast to Poland's political leaders, most respondents disagree with the narrative seeking to demonise the LGBTI+ people and rather agree with fully guaranteeing their rights.



ROMANIA: A COUNTRY OF PARADOXES



Romania remains true to its **pro-transatlantic and pro-US stance, largely supporting measures to help Ukraine both economically and militarily**. Support for NATO in the country, at 89%, has reached its highest level since 2020 and nearly two-thirds believe that Russia poses a security threat to their country.

At the same time, the higher susceptibility of Romanians to believe disinformation narratives underlines certain vulnerabilities. 51% of respondents think that the US is dragging their country into a war with Russia and the perception of the US as Romania's most important strategic partner, now at 53%, declined by more than 20 percentage points compared to 2022.

Romanians also display a concerning **susceptibility towards believing health-related disinformation** - it is the only country where a majority agreed with the false claim that "COVID-19 vaccination increases the chance of an untimely death".



SLOVAKIA: A SUDDEN DECLINE



Unstable and chaotic governance, including the fall of the government in December 2022, accompanied by domestic and foreign actors aiming to further undermine Slovakia's Transatlantic bond and democracy, have contributed to **historically low trust in public institutions in the country** (trust in government stands at 18% and the president at 37%) and a decline in the public backing for Ukraine and support for EU and NATO membership. Respondents' belief that Russia was responsible for the war in Ukraine stood at only 40%, with most falling prey to disinformation narratives, blaming Ukraine or the West.

Slovaks further **reaffirmed their proneness to believing disinformation** in other areas too, with majorities agreeing with a narrative demonising LGBTI+ people and rejecting the notion that liberal democracy is good for their country. Paradoxically, despite only 37% of respondents trusting the media, nearly two-thirds considered media outlets to be free, representing the largest gap between the two measurements in the region.

1

RUSSIAN WAR IN UKRAINE



An understanding of current attitudes towards Russia's aggression and Ukraine provides valuable insight into the CEE region's strengths and vulnerabilities and its continued willingness to support Ukraine in its fight for independence. With the war already in its second year and surrounded by concerns that it may drift into a frozen conflict, it is critical for the West to sustain support for sanctions and supplies of military and humanitarian aid.

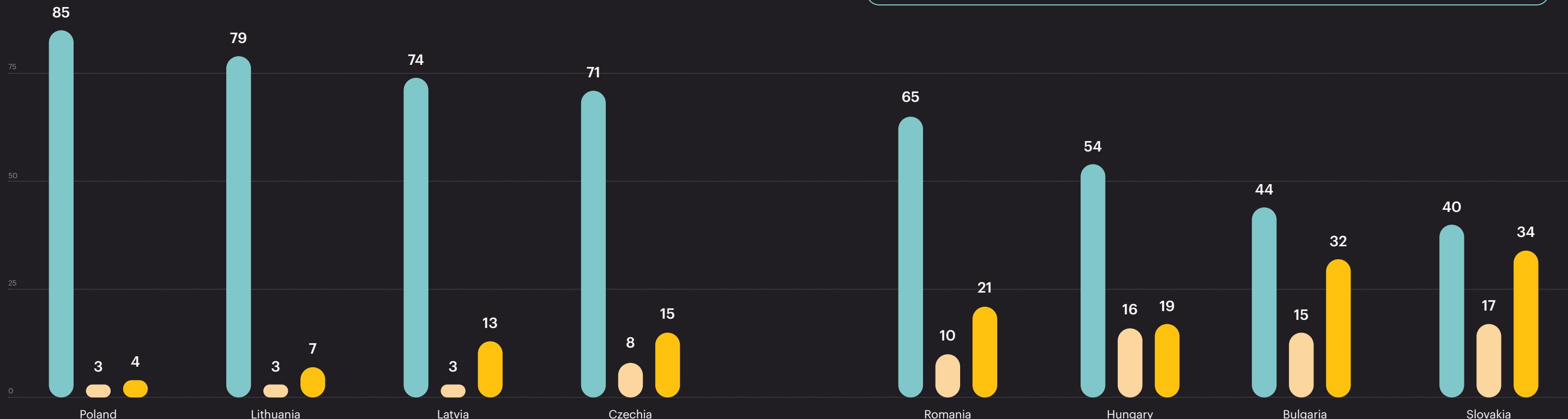
64%
in CEE believe that Russia is primarily responsible for the war in Ukraine.



WHO IS RESPONSIBLE?

**Which of these statements do you relate with the most?
The actor primarily responsible for the war in Ukraine is: (%)**

- Russia which invaded Ukraine
- Ukraine which oppressed the Russian-speaking part of the population
- West which provoked Russia



While an overwhelming majority is still clear on the villain and the victim in the conflict, the persistent use of information operations, the impact of energy and inflation crises, and divisive rhetoric deployed in election campaigns in some countries are all slowly undermining the unity of the CEE region, NATO, and the EU. In the GLOBSEC Trends 2022

polling conducted shortly after the Russian full-scale invasion of Ukraine, a majority of respondents in 5 of 8 CEE countries considered Russia to be primarily responsible for the war. The outliers included Hungary, Bulgaria, and Slovakia – only around 50% of respondents in these three countries agreed that Russia was the culprit, with half either not knowing or

Those agreeing that Russia was primarily responsible for invading Ukraine (%)

● 2022 ● 2023



instead believing disinformation narratives labelling the West or Ukraine as responsible.¹

This year shows Hungarians to be more resolute in attributing blame to Russia despite the reluctance of Viktor Orbán's government to provide military assistance to Ukraine while blaming the West for the war.² In Slovakia and

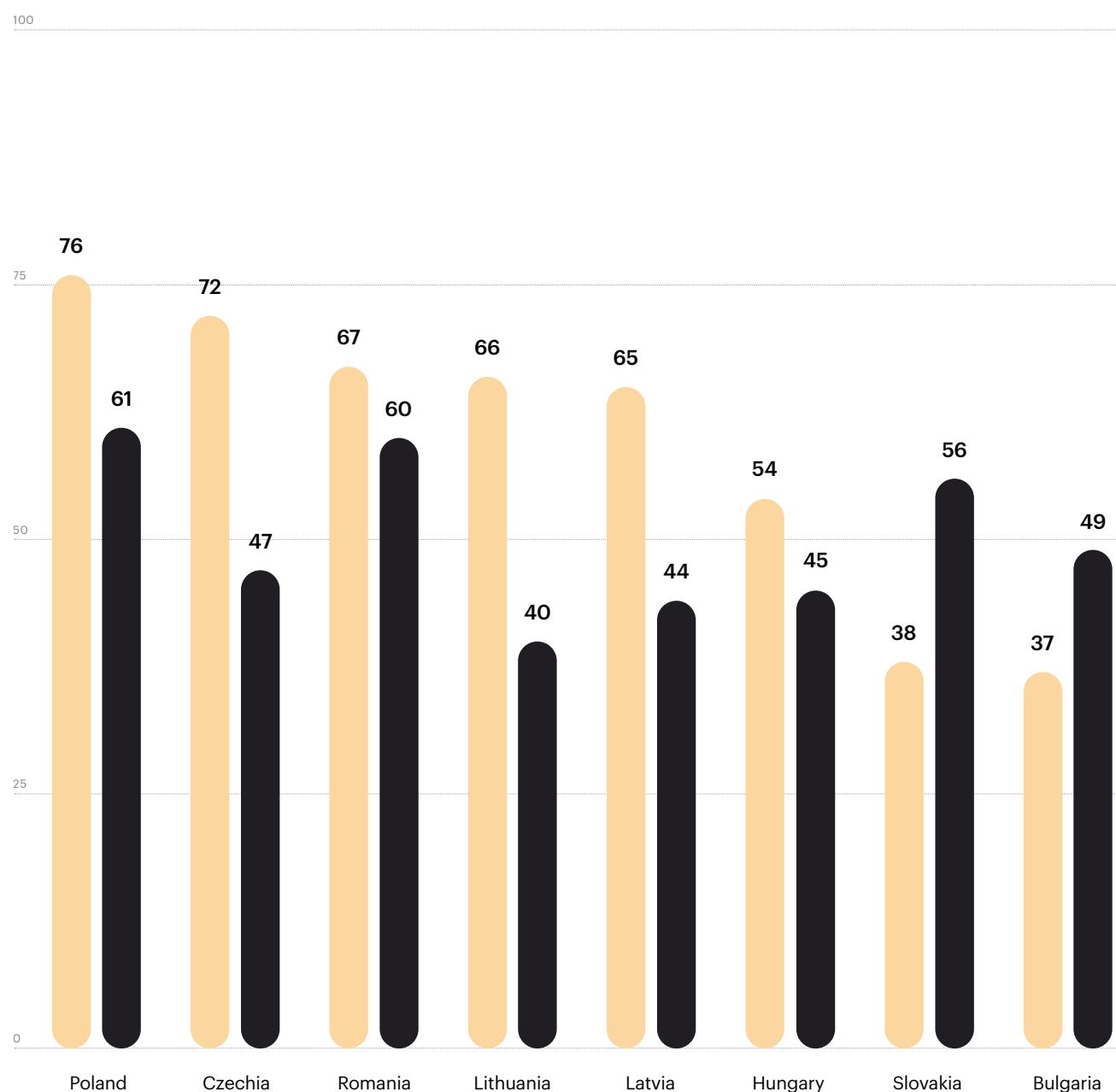
Bulgaria, the trend is heading in the opposite direction, with an increasing number of respondents, 34% and 32% respectively, believing disinformation narratives placing blame on the West for the conflict. The attitude shift may be connected to the fact that the support of Ukraine and its impact on CEE societies and economies are at the core of

domestic political quarrels in both countries. Both Slovakia and Bulgaria were or will be having snap elections in 2023. At the same time, the two countries have had the largest contingents of respondents throughout the region expressing pro-Russian views and prone to believing disinformation narratives.

SUPPORT FOR SANCTIONS

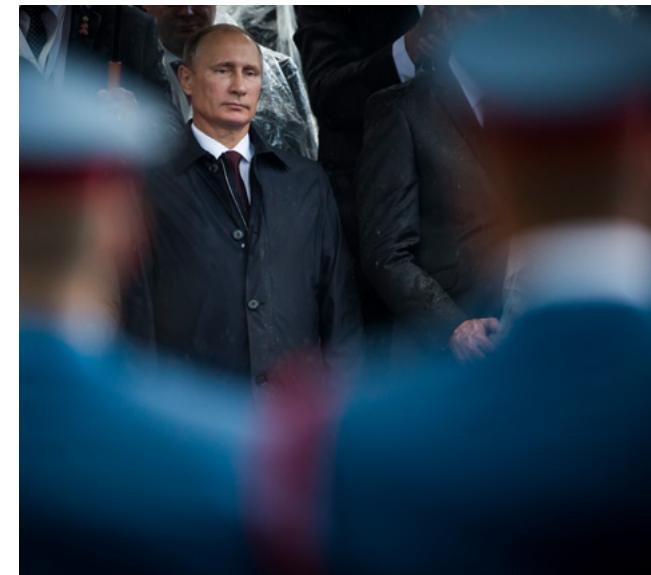
Agreement with statements about economic sanctions: (%)

- Economic sanctions against Russia work and should be in place until Russia withdraws its soldiers from Ukraine.
- Economic sanctions against Russia are ineffective, because they do not harm Russia.



NARRATIVES → ABOUT THE WAR

While an overwhelming majority still subscribe to fact-based narratives and express continued resolve in supporting Ukrainians in their fight for freedom and sovereignty, misunderstandings about the war and buy-in to disinformation narratives are common throughout CEE countries. These numbers are a warning sign for policymakers and the international community – and they also underscore the need to introduce more active and sustained engagement with citizens across the region.



In 6 of 8 countries, majorities perceive sanctions imposed by the EU on Russia in response to the full-scale invasion as effective and believe that they should remain in place until Russia completely withdraws from Ukraine. This strong backing of sanctions in the region tracks closely with EU-wide trends measured by the latest Eurobarometer survey - 74% of respondents agreed with imposing economic sanctions on Russia and Russian companies and individuals.³ That said, 50% in CEE believe that the sanctions imposed are ineffective since they do not harm Russia. The discrepancy can be potentially linked to respondents' demand for stronger sanctions to be imposed on Russia to ensure a harsher impact on the Kremlin. At the same time, the narrative of ineffective sanctions has been widely utilised by both the Kremlin and domestic actors to undermine the support for the measures.

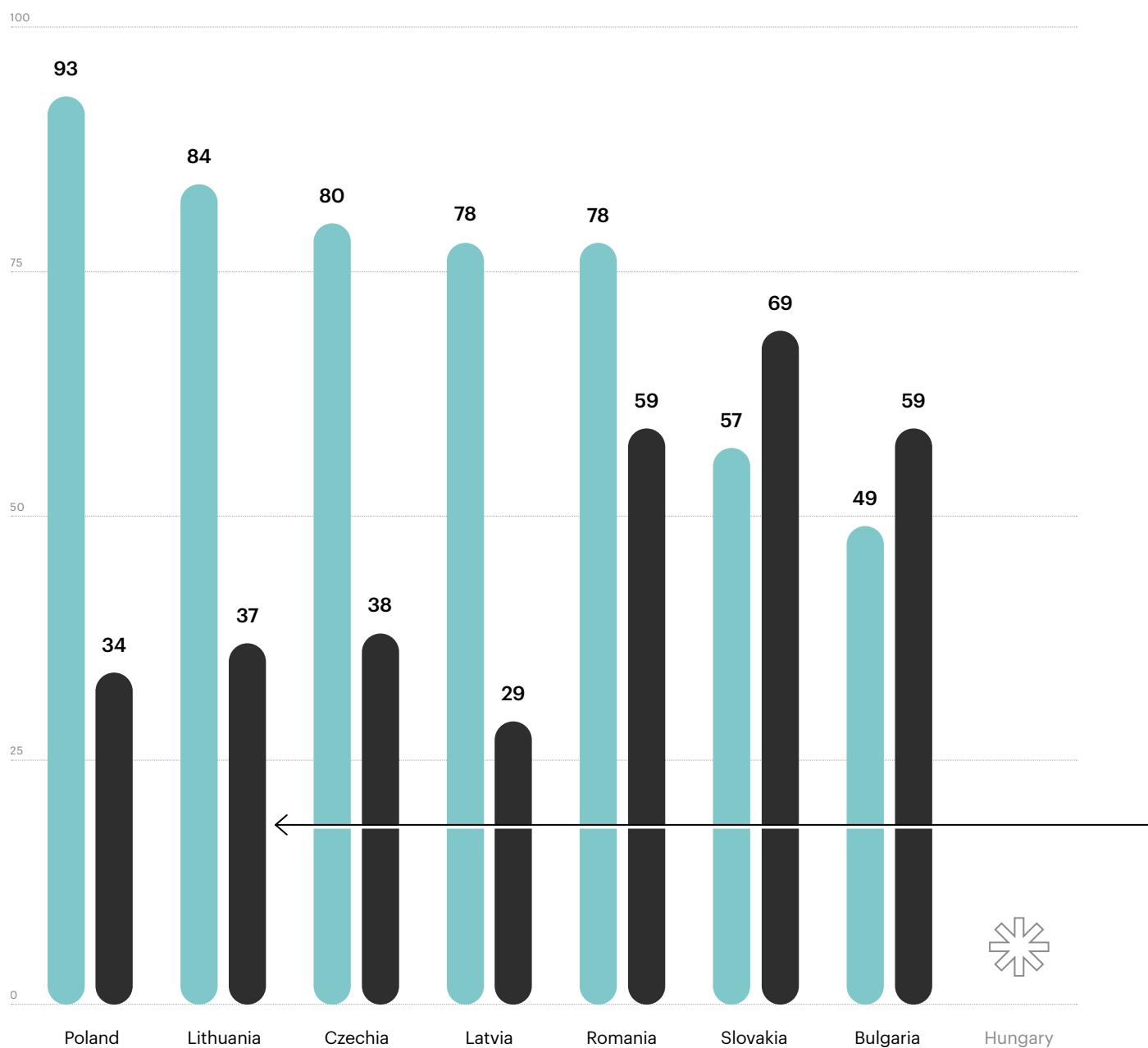
59%
THINK ECONOMIC
SANCTIONS
WORK AND
SHOULD REMAIN
IN PLACE
UNTIL RUSSIA
WITHDRAWS ITS
SOLDIERS FROM
UKRAINE.

50%
THINK ECONOMIC
SANCTIONS
ARE INEFFECTIVE,
BECAUSE THEY
DO NOT HARM
RUSSIA.

HELP UKRAINE OR BECOME A TARGET?

Agreement with statements about military assistance (%)

- By providing military equipment and weapons to Ukraine, my country is helping Ukraine defend itself against Russia.
- By providing military equipment and weapons to Ukraine, my country is provoking Russia and bringing itself closer to the war.



A resounding majority throughout the CEE region agrees that their countries are helping Ukraine defend itself against Russia by providing military equipment to Kyiv, with Bulgaria being a regional outlier. The data also revealed a pattern - the less inclined respondents were to perceive Russia to be a security threat, paradoxically, the more worried they were about their country becoming a target of Russian conquest and getting entangled in the war.

✳ NO WEAPONS, NO CONFLICT

Hungary stands out as a regional outlier – since its political leaders refused to provide any military assistance to Ukraine, to allegedly prevent a further escalation of the conflict,⁴ the statements asked in the polling were different than for other countries and show majority buying in the government's rhetoric. 57% agree that "by providing military equipment and weapons to Ukraine, West is provoking Russia and bringing itself closer to the war".

DOUBTS AS POSSIBLE VULNERABILITIES

In Lithuania, 20% of respondents do not know whether the provision of military equipment and weapons may provoke Russia and bring the country closer to war. The testing of a Lithuania-specific disinformation narrative about Ukrainian refugees among polled respondents, furthermore, found a similar percentage unsure about whether "by hosting refugees from Ukraine, Lithuanians are risking that Russia will attack them in the future". While 51% of respondents disagreed with the statement, one-fifth of the respondents held tentative thoughts on the matter. This latter group provides an opening that could be exploited by influence operations aimed at polarising societies.

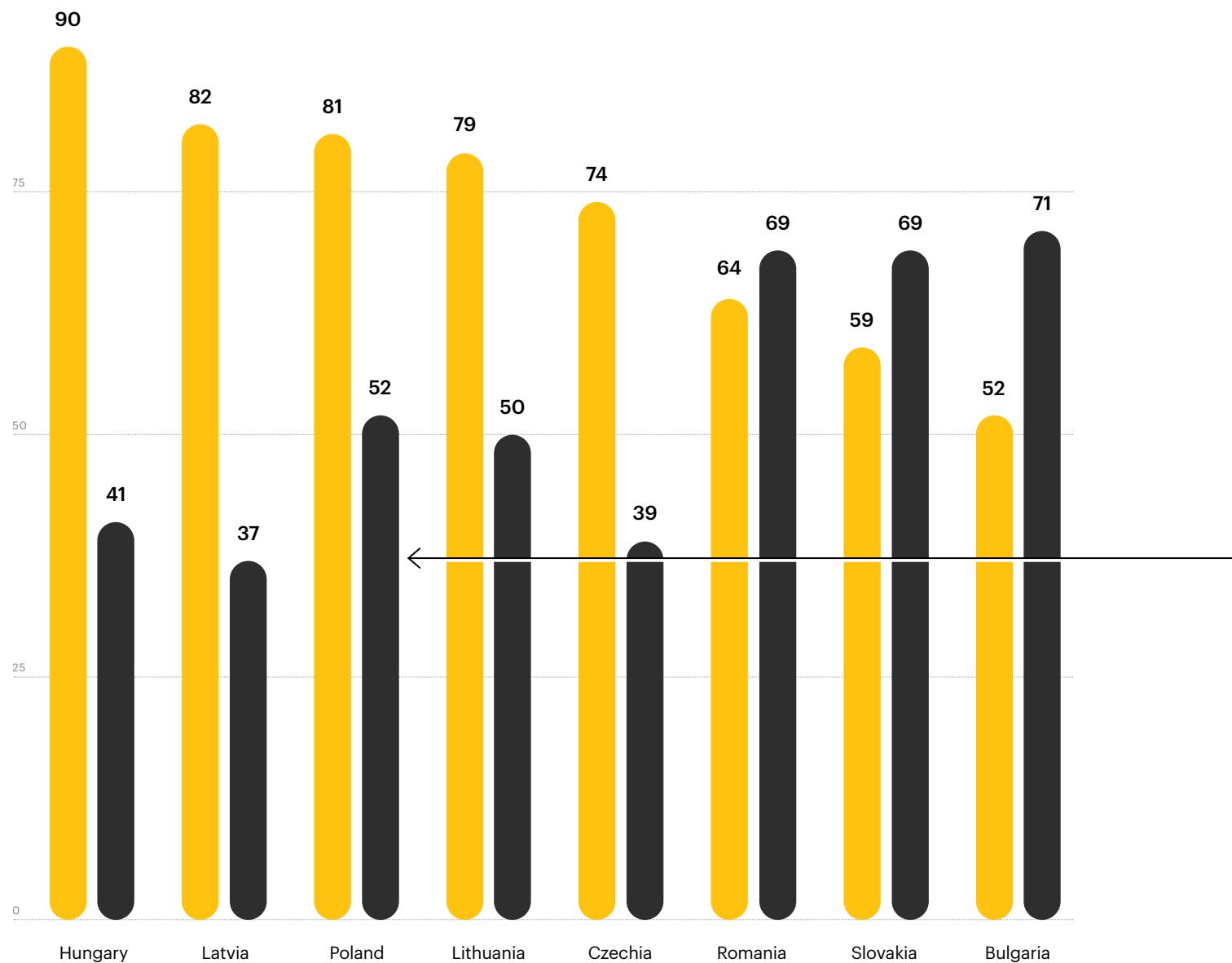
74%
THINK THAT BY PROVIDING MILITARY EQUIPMENT AND WEAPONS TO UKRAINE, THEIR COUNTRY IS HELPING UKRAINE DEFEND ITSELF AGAINST RUSSIA.

46%
THINK THAT BY PROVIDING MILITARY EQUIPMENT AND WEAPONS TO UKRAINE, THEIR COUNTRY IS PROVOKING RUSSIA AND BRINGING THEM CLOSER TO WAR.

CONSISTENT SUPPORT FOR UKRAINIAN REFUGEES

Agreement with statements about refugee assistance (%)

- My country needs to continue supporting Ukrainian refugees because they are fleeing the war.
- Ukrainian refugees receive support at the expense of our citizens from weaker and socially vulnerable parts of population, that need it more.



Over a year into the war, support for refugees also remains robust throughout the region, with 73% of CEE respondents agreeing that their countries should continue providing assistance to refugees. At the same time, 53% think Ukrainian refugees are receiving this aid at the expense of socially vulnerable groups in their countries who need it even more. As with other examples of disinformation and manipulative efforts, the narrative that refugees are given preferential treatment regarding social benefits over citizens resonates most among Bulgarians, Romanians, and Slovaks. Such strong resonance of the narrative portraying Ukrainians as “stealing from locals” should be swiftly addressed to prevent further growth.

TENSIONS BUBBLING UNDER THE SURFACE

Even in countries like Poland, espousing welcoming and supportive views towards Ukrainians fleeing Russia's aggression, the narrative that Ukrainians are receiving benefits at the expense of locals finds some resonance. In Poland, a majority of Ukrainian refugees, predominantly women with children, are concentrated in the largest Polish cities, placing enormous strain on local administrations, housing, schools, the job market, and healthcare in incorporating a vast number of arrivals into society. By September 2022, it was estimated that around 700,000 to 800,000 school-aged refugees from Ukraine had arrived in Poland.⁵ It might have been one of the factors contributing to the rise of Polish right-wing Konfederacja party that has nearly doubled its polling support over the past six months and now stands at 10%, positioning itself as the third most popular party as parliamentary elections approach in October 2023.⁶

73%
THINK THEIR
COUNTRY NEEDS
TO CONTINUE
SUPPORTING
UKRAINIAN
REFUGEES
BECAUSE THEY
ARE FLEEING
A WAR.

53%
THINK UKRAINIAN
REFUGEES ARE
RECEIVING
SUPPORT AT THE
EXPENSE OF
DISADVANTAGED
AND SOCIALLY
VULNERABLE
CITIZENS, THAT
NEED IT MORE.

2

NATO: I AM BACK



NATO member states are now more united than they have been in years as they respond to the Kremlin's atrocities against civilians and its occupation of the territory of a democratic and independent country. The defence and deterrence concept of NATO membership became an important security guarantee, even spurring Finland and

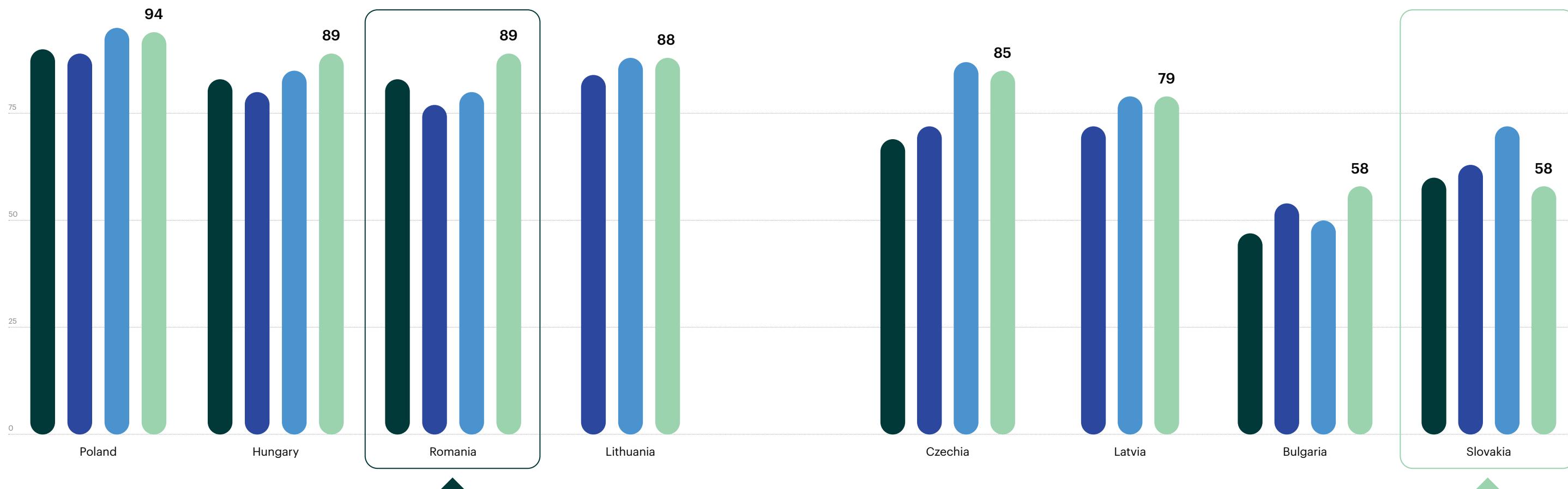
Sweden - historically neutral countries - to apply for membership.

This year, the polling shows that NATO membership continues to enjoy robust and unwavering support throughout the region. Despite a softening of this sentiment in Slovakia, the overall regional average has remained steady at 79%. The stability of support for NATO is an encouraging sign for the Alliance, demonstrating a shared commitment to security and defence among its members in the face of growing global threats.

Regional support for NATO is stable at **79%**.

Imagine that the following weekend there will be a referendum in your country on its membership in NATO. How would you vote – for your country to stay in NATO or leave NATO? Those who would vote to stay. (%)

● 2020 ● 2021 ● 2022 ● 2023

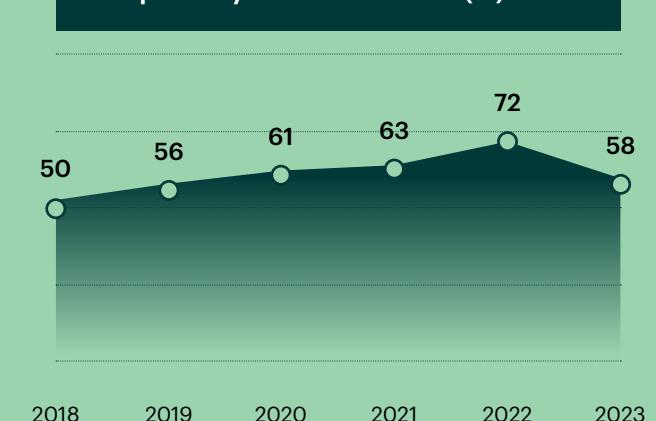


ROMANIAN SUPPORT FOR NATO MEMBERSHIP INCREASED TO 89%.
CONFIDENCE IN NATO SURGED 11 PERCENTAGE POINTS AND TRUST IN THE ARMED FORCES SOARED 16 PERCENTAGE POINTS.

SLOVAK DEVIATION

Slovak support for NATO saw a steady uptick between 2018 and 2022, with a steeper rise last year following Russia's aggression. Rampant disinformation campaigns carried out both by domestic and foreign actors⁷, however, have contributed to a decline in support for NATO membership, with its backing returning to levels last seen around 2019. While Slovak support for Alliance membership is currently on par with that of Bulgaria, the latter experienced an increase in support this year compared to 2022.

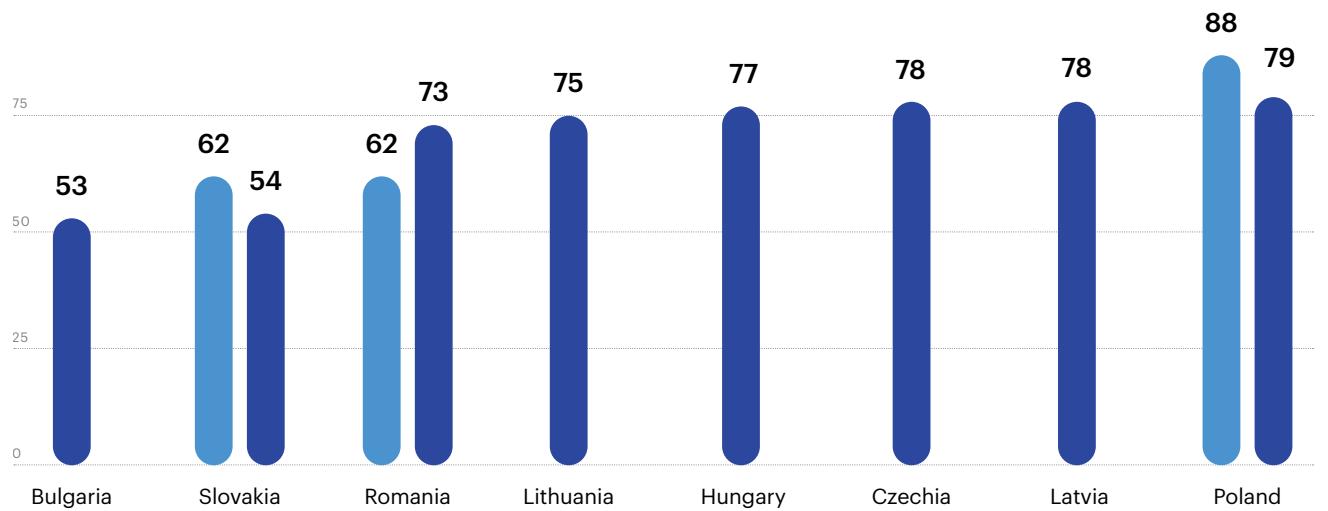
Support for NATO membership over the past 6 years in Slovakia (%)



CONFIDENCE IN NATO DETERRENCE

My country's membership in NATO makes it less likely that a foreign nation will attack us. (%)

● 2022 ● 2023



While publics in 6 of 8 CEE countries express strong support for NATO membership, this backing does not automatically translate into the same level of confidence that membership can effectively deter foreign aggressors. Paradoxically, alignment between support

for NATO membership and confidence in its effectiveness is most present in the countries with the least amount of public support for membership - Bulgaria, Slovakia, and Latvia.

One possible reason for this discrepancy may lie in historical experiences or geopolitical considerations. The explicit warnings issued by Russia regarding the possibility of a nuclear global conflict if NATO intervenes in Ukraine and the experiences of CEE countries over the past century in being abandoned by allies seeking to avoid full-scale conflicts may each translate into lower confidence in NATO's deterrence among CEE countries. NATO's decision-making processes and

dynamics, meanwhile, have conveyed an impression of disunity at times, as illustrated recently by disagreements about the acceptance of Sweden into the Alliance. These debates may have also impacted confidence levels in the collective defence commitments of NATO peers.

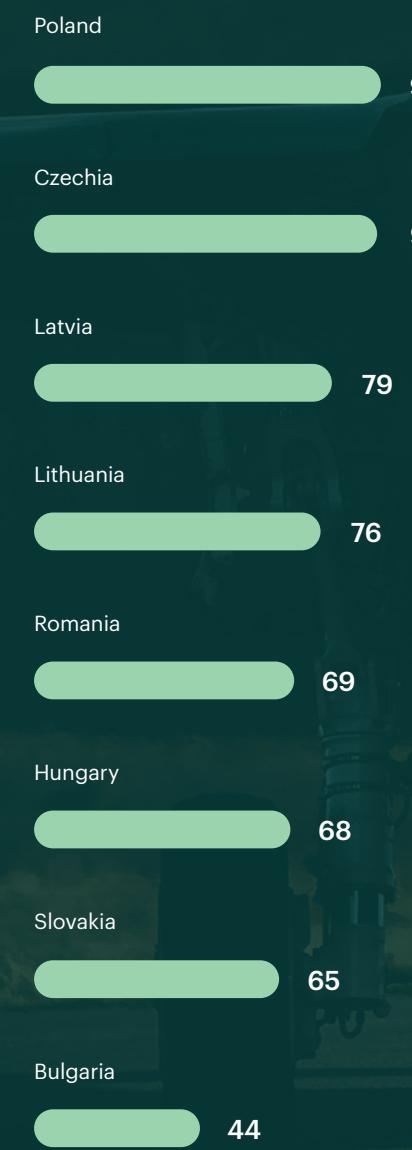
The decline in NATO confidence in Poland may be further linked to a November 2022 incident that saw a missile strike Polish territory near the country's border with Ukraine amid Russia's attack on Ukrainian energy infrastructure. No formal steps were taken against Moscow even though the incident was a direct consequence of Russia's aggression.

The graph only visualises changes in countries that experienced shifts over 5% in public opinion.

COLLECTIVE DEFENSE

My country should help defend our NATO neighbours in case of an attack. (%)

● 2023



73% OF CEE RESPONDENTS WOULD SUPPORT A COLLECTIVE DEFENCE RESPONSE IF THEIR NATO NEIGHBOUR WAS ATTACKED.

The principle of collective defence, based on which member states come to the aid of other allies if any are attacked, lies at the heart of NATO and CEE is ready to support such commitment. A resounding 77% average of CEE respondents in 7 of 8 countries are willing to help defend their allies in the event of an attack, with Bulgaria constituting an outlier. At the same time, while Lithuania, Romania, and Hungary are staunch supporters of NATO membership, they are less willing to come to the defence of their neighbours if a conflict were to occur. On the other hand, paradoxically, more Slovaks are willing to defend Czechs, Poles, or other NATO neighbours than are willing to stay in the Alliance.

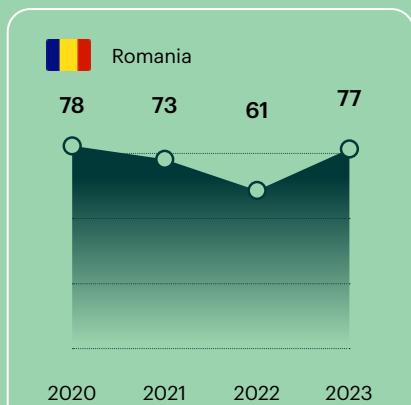
TRUST IN OWN ARMED FORCES

Responses to the question: I would like to ask you, how much do you personally trust or distrust the armed forces in your country?

Trust in armed forces (%)

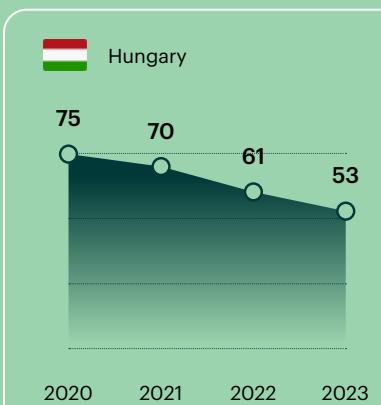
Militaries usually enjoy higher levels of trust in countries – they tend to be less politicised and fulfil a crucial role in ensuring the security of the public. While the armed forces still boast over 70% trust in most CEE countries these trust levels have declined substantially in Bulgaria, Slovakia, and Hungary since 2020.

The drops were the sharpest in 2022 following the beginning of Russia's invasion of Ukraine – the downward move could reflect genuine worries about the capabilities of their armies in being able to defend their countries in the event of an attack.

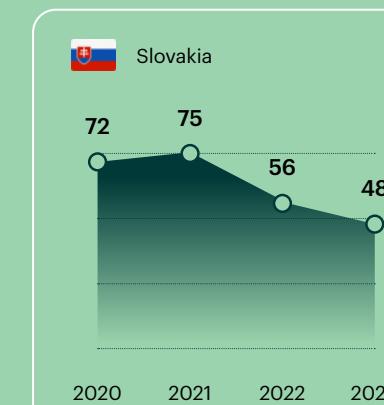


"The rise in trust across all state institutions may be attributed to the data in 2022 being at an all-time low due to authorities' handling of the COVID-19 pandemic and the overall political climate."

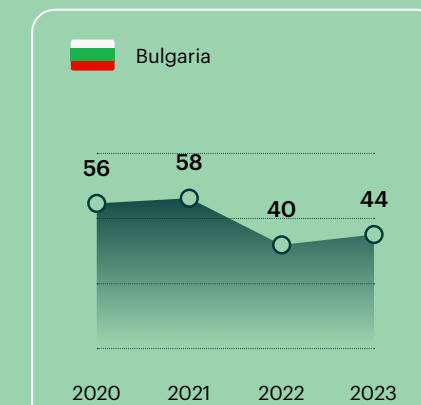
Elena Calistru, Funky Citizens



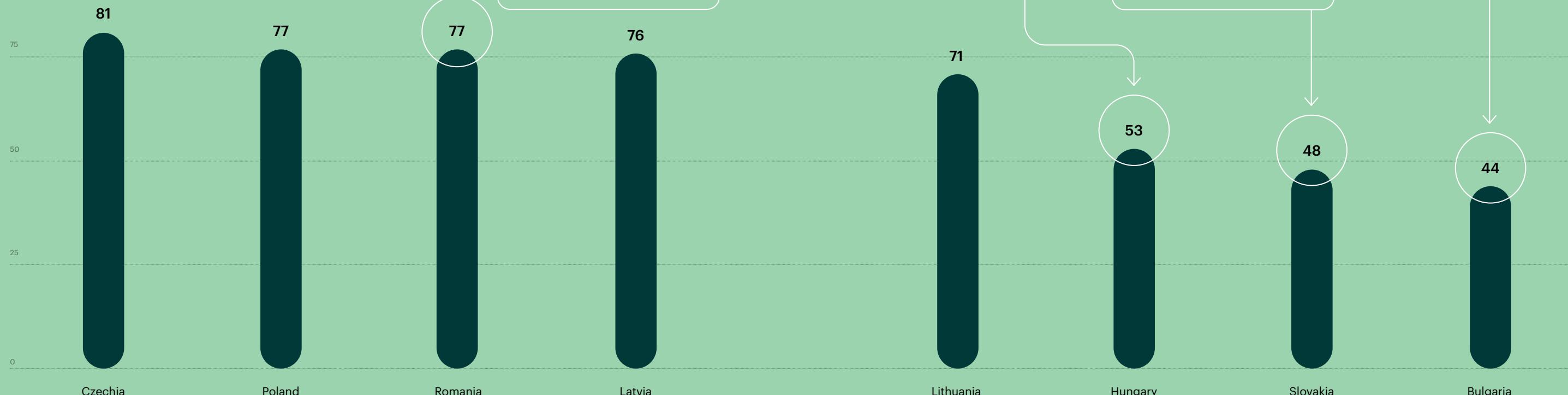
The reduction in personnel within the Hungarian armed forces by 150 officers, as mandated by a governmental decree⁸, has potentially led to an erosion of public confidence in the institution.



In Slovakia, pro-Atlanticist strategic communication of the armed forces and the regular publication of information on Russian war crimes that clash with pro-Kremlin nationalistic societal groups may be further steering distrust.



The declines in Bulgaria and Slovakia should be viewed against a broader backdrop of widespread and systematic distrust in both domestic and international institutions in the two countries.



3

THREAT OR NOT?



Russia's invasion of Ukraine radically changed the security environment on the continent. For many in CEE, the invasion was a wake-up call for threat awareness, resilience-building, and appreciation of the importance of NATO membership as a security guarantee. One year into the conflict, the region remains strong and resolute in understanding what the biggest security threat is. Unfulfilled immediate worries that the war would spread to wider region and growing apathy towards the conflict are, however, slowly decreasing the threat awareness among some communities.



In 6 of 8 countries, Russia is perceived to be a threat by a majority.

RUSSIA, A SECURITY THREAT



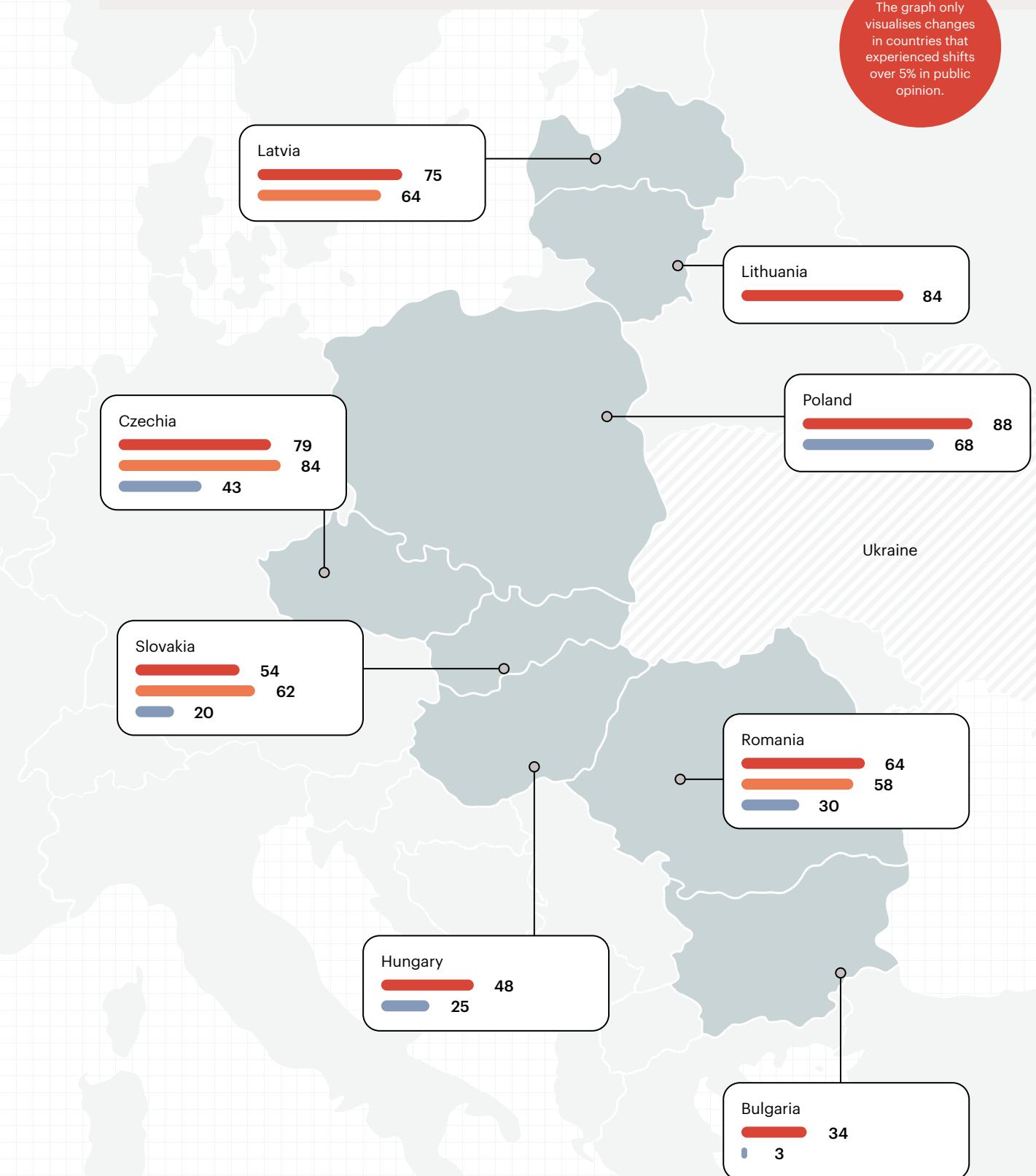
On average, 66% of respondents across the CEE region perceive Russia to be a security threat to their own countries, twice as much as in 2020 (32%). Still, while the full-scale invasion was a wake-up call for many, there are notable differences between countries. In Bulgaria and Hungary, majorities of respondents still do not perceive Russia to be a threat despite the war. This divergence can be explained, in part, by widely held perceptions in the two countries that Russia is their most important strategic partner, with a quarter of Bulgarians and Hungarians perceiving Russia this way (more on strategic partners in the following chapter). Political, cultural and historical factors play a key role in these perceptions as well, with some governments and/or political leaders refraining from outright labelling Russia as a security threat, criticising its invasion or even advocating for cooperating with Russia.

**ONLY 34% OF
BULGARIANS
PERCEIVE
RUSSIA AS
A THREAT.**

Russia poses a security threat to my country⁹ (%)

● 2023 ● 2022 ● 2020

The graph only visualises changes in countries that experienced shifts over 5% in public opinion.

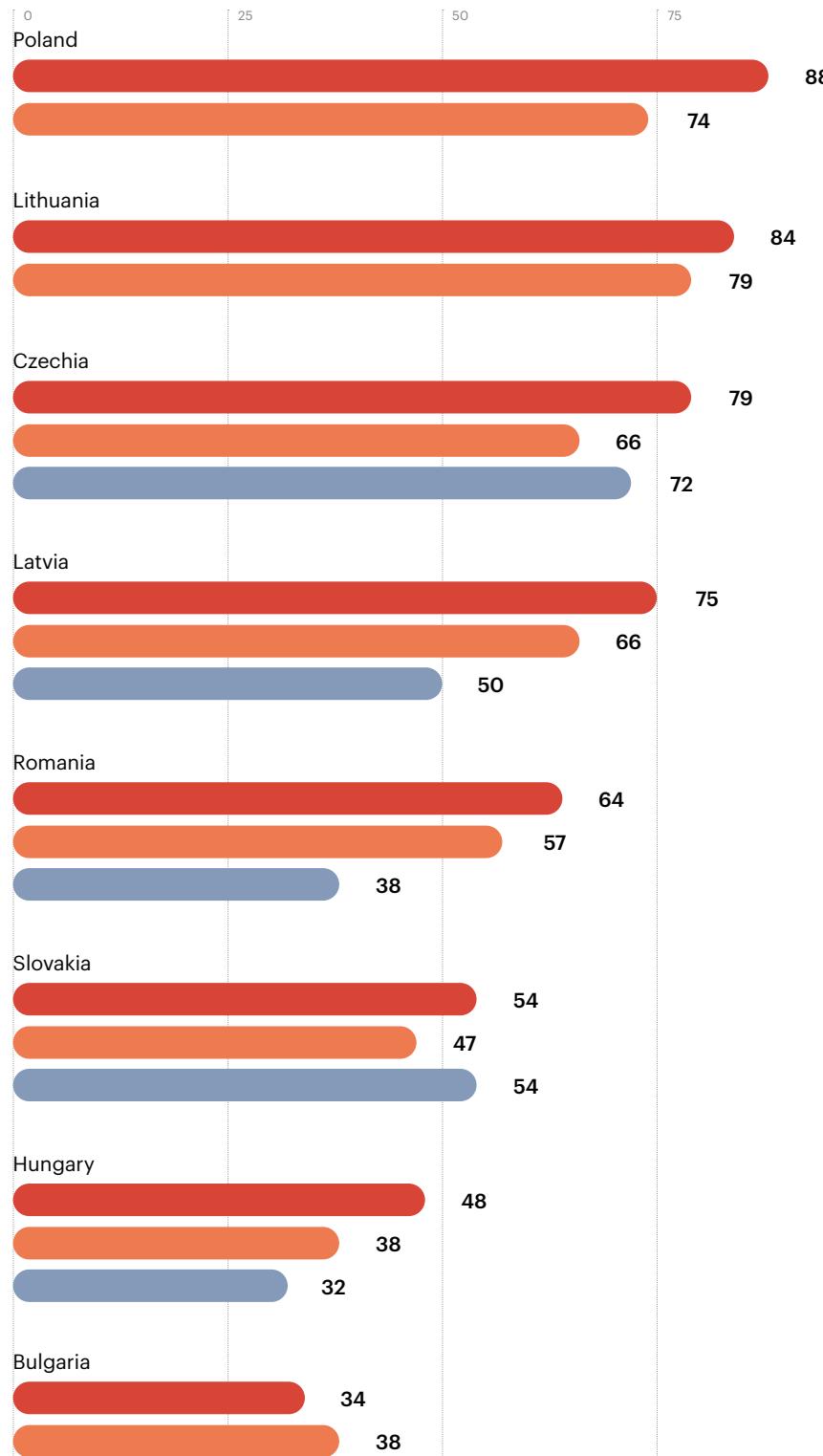


58% in CEE consider Russia to be a threat to their national identity and values.

Different understandings of Russian threat (%)

- Russia as a threat to security in 2023
- Russia as a threat to identity and values in 2023
- Russia as a threat to identity and values in 2022

The graph only visualises changes in countries that experienced shifts over 5% in public opinion.



More CEE respondents perceive Russia to be a threat to their national security (66% on average) than their national identity and values (58% on average). A shared history and alleged common “pan-Slavic” ethnic and cultural background with Russia are important factors in Bulgaria and Slovakia – in GLOBSEC Trends 2020, 84% of Bulgarians and 78% of Slovaks perceived Russia to be their country’s traditional Slavic brother nation.¹⁰ On the other hand, the Kremlin’s continued war atrocities and violations of international law and human rights have most resonated with Latvian and Romanian public opinion, which experienced the greatest increase in perceiving Russia both as a threat to security and identity and values since 2022.

CHINA STILL NOT A THREAT

The influence activities of China are still going largely unnoticed in the region, with a majority not viewing Beijing as a security threat, although the average of such respondents across the region dropped from 62% to 53%. Notable differences between countries are also apparent. While Czechia leads the way on both awareness and the adoption of resilience-building measures towards Beijing’s malign influence operations, few Bulgarian, Hungarian, or Romanian respondents perceive China to be a security threat. All told, 32% of CEE respondents do not deem China to be a threat to their national identity and values.

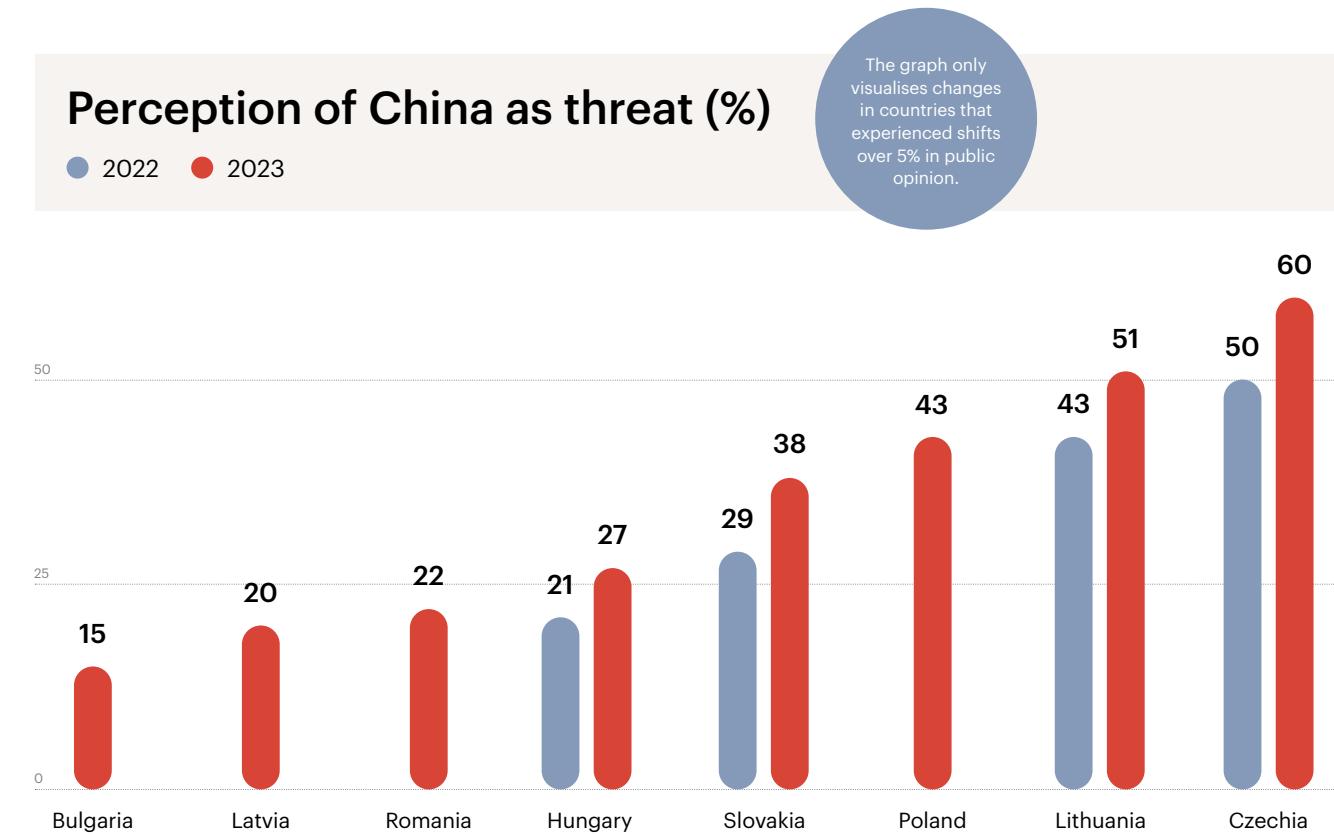
As Chinese activities in the region go overlooked amid the conflict in Ukraine, vast discrepancies in situational awareness and threat perceptions across the CEE region could lead to severe vulnerabilities within the EU and NATO. The war in Ukraine is likely far from over, which will leave member states preoccupied with the Kremlin’s malign influence operations and expansionist policies.

“The quarrel between Lithuania and China over Taiwan was a controversial issue in Lithuania. As some previous surveys showed, most respondents in the country were not happy with Lithuania’s government initiative to open the Taiwanese representative office in Vilnius. The primary adverse reaction was based on the fear that Chinese trade sanctions may hurt Lithuania’s economy. Although the actual impact on Lithuanian trade was negligible, the official communication about the reasons and consequences of Lithuania’s foreign policy towards China and Taiwan was far from flawless.”

Tomas Janeliūnas,
Eastern Europe Studies Centre

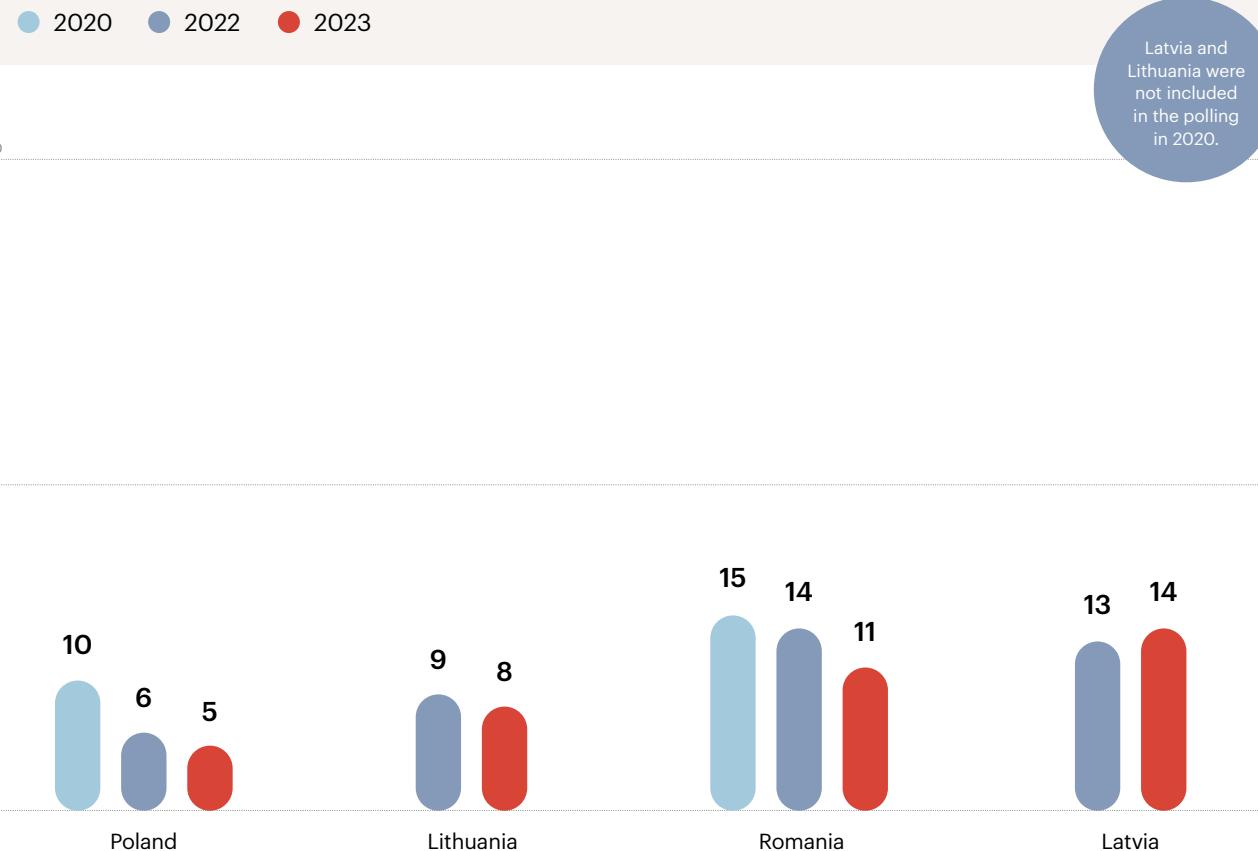
Perception of China as threat (%)

- 2022
- 2023



3 IN 1: ALLY, SECURITY GUARANTOR AND A THREAT

The US poses a security threat to my country. (%)

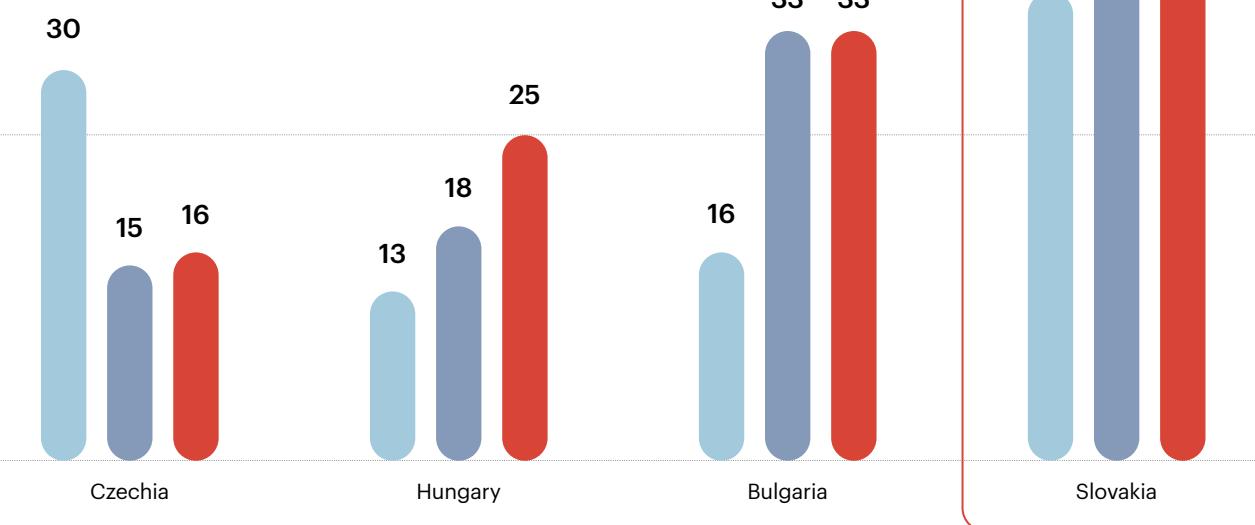


In 7 of 8 countries, majorities of respondents do not perceive the US to be a security threat. Intensive and years-long information operations spread about the key ally and security guarantor of the CEE region have, however, impacted significant segments of the population in some countries.

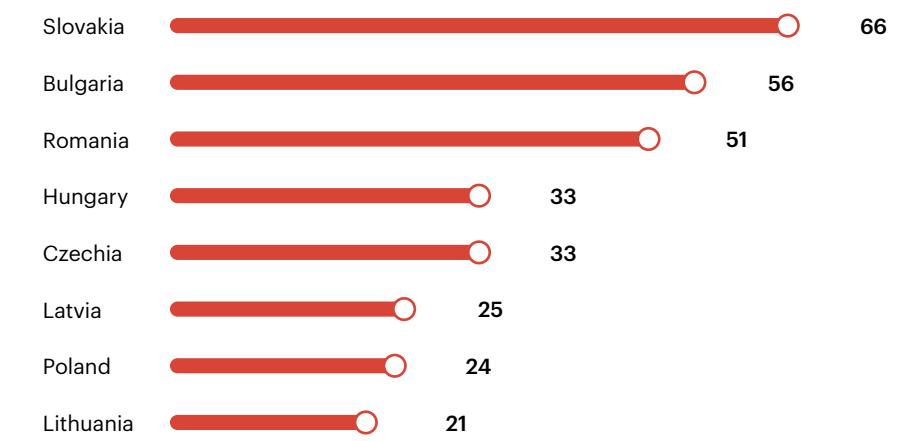
73% of CEE respondents do not perceive the US to be a security threat. On the contrary, majorities in Poland, Lithuania, Latvia, and Romania view the US as the most important strategic partner for their countries.

SLOVAKIA IS A CLEAR REGIONAL OUTLIER, WITH 50% OF RESPONDENTS PERCEIVING THE US TO BE A SECURITY THREAT, AN 11 PERCENTAGE POINT INCREASE FROM 2022.

Numerous Slovak populist political representatives have used the narrative of peace to justify cooperation with the Kremlin or a halt to weapons deliveries to Ukraine.¹¹ While the peace narrative ploy has also been used by far-right leaders in Italy and France,¹² Slovakia has experienced years of smear campaigns that have lambasted NATO as a tool of the US aimed at controlling smaller countries and an instrument for proxy conflicts.¹³ A total of 66% of Slovaks believe the narrative that the "US is dragging Slovakia into a war with Russia because it is profiting from it".



**Those who agree with a statement:
The US is dragging my country into a war with Russia because it is profiting from it. (%)**



WHO IS OUR PARTNER?



Similar to threat perceptions, a new regional dynamic is emerging regarding attitudes towards strategic partners. The latest data reaffirms a reduced emphasis placed on Germany and a heightened importance on the United States compared to the pre-war years. This finding suggests that priorities across CEE countries have shifted, with part of the region considering security guarantees from the US as equally important as the economic cooperation and ties associated with Germany.



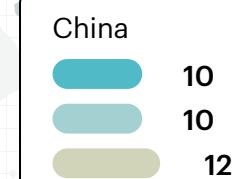
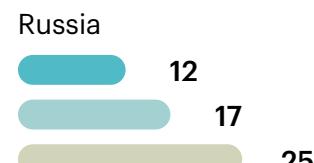
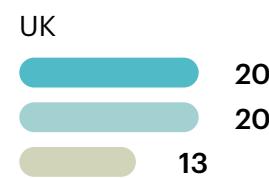
Meanwhile, despite the size and influence of Russia and China in international affairs, both countries are perceived as important only by small segments of the CEE population, indicating a regional preference towards partnering with democracies rather than non-democratic regimes.

44%
perceive the US as the most important strategic partner for their country, a steady increase since 2021.

Average responses to: Which of the following countries are the most important strategic partners of your country today? Pick maximum two. (%)

● 2023 ● 2022 ● 2021

Respondents could choose from a randomised selection of 6 countries included in the chart.



GERMANY: ECONOMIC COOPERATION IS KEY

Perception of Germany as a strategic partner (%)



Germany is considered to be the most important strategic partner for Czechia, Slovakia, Hungary, and Bulgaria and perceived as an important partner by at least 25% of respondents in all CEE countries. Economic cooperation, seeing Germany as a superpower, geographical proximity, positive bilateral relations, and relations within the EU all

undergird these views. The sentiment demonstrates the importance of strong diplomatic ties and geographical proximity when it comes to building effective partnerships and enhancing economic stability.

Most common reasons for selecting Germany as a strategic partner

Only countries where more than 20% of respondents considered Germany to be a strategic partner and only reasons stated by more than 10% of respondents from "n" were included. Respondents could spontaneously reply with more reasons.)

Czechia n=783

- ① CLOSE NEIGHBOUR, GOOD MUTUAL RELATIONS (52%)
- ② ECONOMIC COOPERATION AND TIES (37%)
- ③ GERMANY IS A POLITICAL/ECONOMIC SUPERPOWER (17%)

Hungary n=537

- ① ECONOMIC COOPERATION AND TIES (54%)

Slovakia n=456

- ① ECONOMIC COOPERATION AND TIES (36%)
- ② GERMANY IS A POLITICAL/ECONOMIC SUPERPOWER (24%)
- ③ CLOSE NEIGHBOUR, GOOD MUTUAL RELATIONS (13%)

Lithuania n=462

- ① GERMANY IS A POLITICAL/ECONOMIC SUPERPOWER (20%)
- ② GUARANTEE OF OUR SAFETY/SECURITY (20%)
- ③ CLOSE NEIGHBOUR, GOOD MUTUAL RELATIONS (19%)
- ④ RELIABLE ALLY, TRUSTED PARTNER (12%)

Latvia n=401

- ① KEY MEMBER OF THE EU/NATO (26%)
- ② ECONOMIC COOPERATION AND TIES (18%)
- ③ CLOSE NEIGHBOUR, GOOD MUTUAL RELATIONS (13%)
- ④ GERMANY IS A POLITICAL/ECONOMIC SUPERPOWER (10%)

Bulgaria n=403

- ① GERMANY IS A POLITICAL/ECONOMIC SUPERPOWER (37%)
- ② KEY MEMBER OF THE EU/NATO (24%)
- ③ A DEVELOPED COUNTRY, WELL MANAGED, GOOD EXAMPLE (22%)
- ④ RELIABLE ALLY, TRUSTED PARTNER (14%)
- ⑤ ECONOMIC COOPERATION AND TIES (12%)

Poland n=390

- ① CLOSE NEIGHBOUR, GOOD MUTUAL RELATIONS (58%)
- ② ECONOMIC COOPERATION AND TIES (24%)
- ③ A DEVELOPED COUNTRY, WELL MANAGED, GOOD EXAMPLE (18%)

Data for Romania is not available due to methodological discrepancies caused during the data collection.

THE US: GUARANTOR OF SAFETY AND SECURITY

Perception of the US as a strategic partner (%)



The US is considered the most important strategic partner in Latvia, Lithuania, Poland, and Romania, with Washington also playing an important role for Czechs. Respondents especially see the US as a political, military, and economic superpower in the world.

The US is valued for its role in ensuring safety and security, providing weapons and military aid, and serving as a reliable and trustworthy ally.

ROMANIA AND THE US

Romania is firmly entrenched within Euro-Atlantic structures, with 86% and 89% respondents, respectively, supporting membership in the EU and NATO. However, perceptions that the US is Romania's most important strategic partner declined by 22 percentage points to 53% over the past year. This shift can be partially explained by another finding of the GLOBSEC Trends survey indicating that Romanian society is evenly split on whether the country benefits from its strategic partnership with the US.

The strategic partnership with the US does not benefit Romania, it only transformed Romania in importer of arms and military equipment.

Agree Do not know Disagree

47 5 48

Most common reasons for selecting the US as a strategic partner

Only countries where more than 20% of respondents considered the US to be a strategic partner and only reasons stated by more than 10% of respondents from "n" were included. Respondents could spontaneously reply with more reasons.

Poland	n=776
① THE US IS A POLITICAL/ECONOMIC SUPERPOWER (30%)	
② GUARANTEE OF OUR SAFETY/SECURITY (24%)	
③ THE US HELPS POLAND (13%)	
④ A DEVELOPED COUNTRY, WELL MANAGED, A GOOD EXAMPLE FOR POLAND (13%)	
⑤ RELIABLE ALLY, TRUSTED PARTNER (11%)	
⑥ STYLE OF POLITICS (10%)	

Lithuania	n=643
① THE US IS A POLITICAL/ECONOMIC SUPERPOWER (32%)	
② RELIABLE ALLY, TRUSTED PARTNER (18%)	
③ GUARANTEE OF OUR SAFETY/SECURITY (17%)	
④ KEY MEMBER OF NATO (14%)	

Czechia	n=419
① THE US IS A POLITICAL/ECONOMIC SUPERPOWER (44%)	
② KEY MEMBER OF NATO (19%)	
③ GUARANTEE OF OUR SAFETY/SECURITY (13%)	

Bulgaria	n=199
① RELIABLE ALLY, TRUSTED PARTNER (40%)	
② THE US IS A POLITICAL/ECONOMIC SUPERPOWER (36%)	
③ THE US DEFENDS DEMOCRACY AND FREEDOM AND HUMAN RIGHTS (14%)	

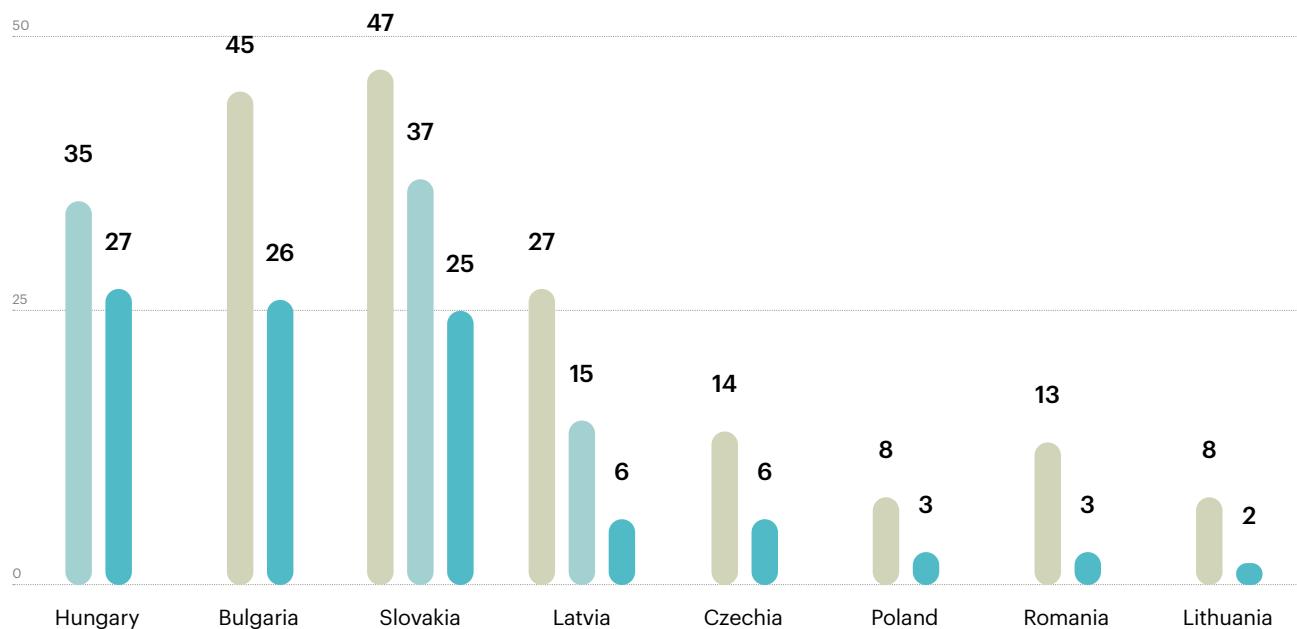
RUSSIA: A PARTNER OR AN ADVERSARY?

Perception of Russia as a strategic partner (%)

● 2021 ● 2022 ● 2023

The graph only visualises changes in countries that experienced shifts over 5% in public opinion.

75



CEE countries are divided between three categories as far as perceptions towards Russia as a strategic partner are concerned. One set of countries, including Czechia, Lithuania, Poland, and Romania, held little esteem for Russia's importance even before the start of the war, with these views only hardening after February 2022.

A second position, represented only by Latvia, saw perceptions of Russia as a partner decline by 21 percentage points over the past two years. This decline stands out given that ethnic Russians make up 25% of Latvia's population.

The third group, consisting of Bulgaria, Slovakia, and Hungary, held Russia in high regard as a strategic partner prior to the invasion in 2022. And although perceptions of Russia as a strategic partner nearly halved in Bulgaria and Slovakia in 2022, one-quarter of respondents still view the country in these terms. This pattern, to some extent, reflects positive inclinations towards Russia among some parts of society in these countries, but could also be the product of pro-Russian rhetoric deployed by political figures pressing the case on the importance of Russia's energy supplies for their countries and Europe. The power of these narratives in Slovakia and Hungary is reflected in spontaneous responses to an open-ended question probed by GLOBSEC Trends concerning "why" respondents who selected Russia as a strategic partner for their country made that choice. Most respondents in Hungary and Slovakia mentioned the dependence on Russia's natural resources as a key motivating factor behind their opinions. This finding suggests there may

be space for changing these views given that this narrative can be countered rather easily. Bulgarians, however, mostly highlighted their common history and cultural proximity, underscoring that those strategic partnership perceptions are more values-based and entrenched among around 20% of respondents.



Most common reasons for selecting Russia as a strategic partner

Only countries where more than 20% of respondents considered Russia to be a strategic partner and only reasons stated by more than 10% of respondents from "n" were considered. Respondents could spontaneously reply with more reasons.

Hungary n=249

- 1 DEPENDENCE ON STRATEGIC RAW MATERIALS (46%)
- 2 GOVERNMENT'S / VIKTOR ORBÁN'S FAVOURABLE VIEW OF RUSSIA (10%)

Slovakia n=249

- 1 DEPENDENCE ON STRATEGIC RAW MATERIALS (48%)
- 2 RUSSIA IS A POLITICAL/MILITARY SUPERPOWER (14%)
- 3 CULTURAL AND VALUE PROXIMITY (13%)

Bulgaria n=256

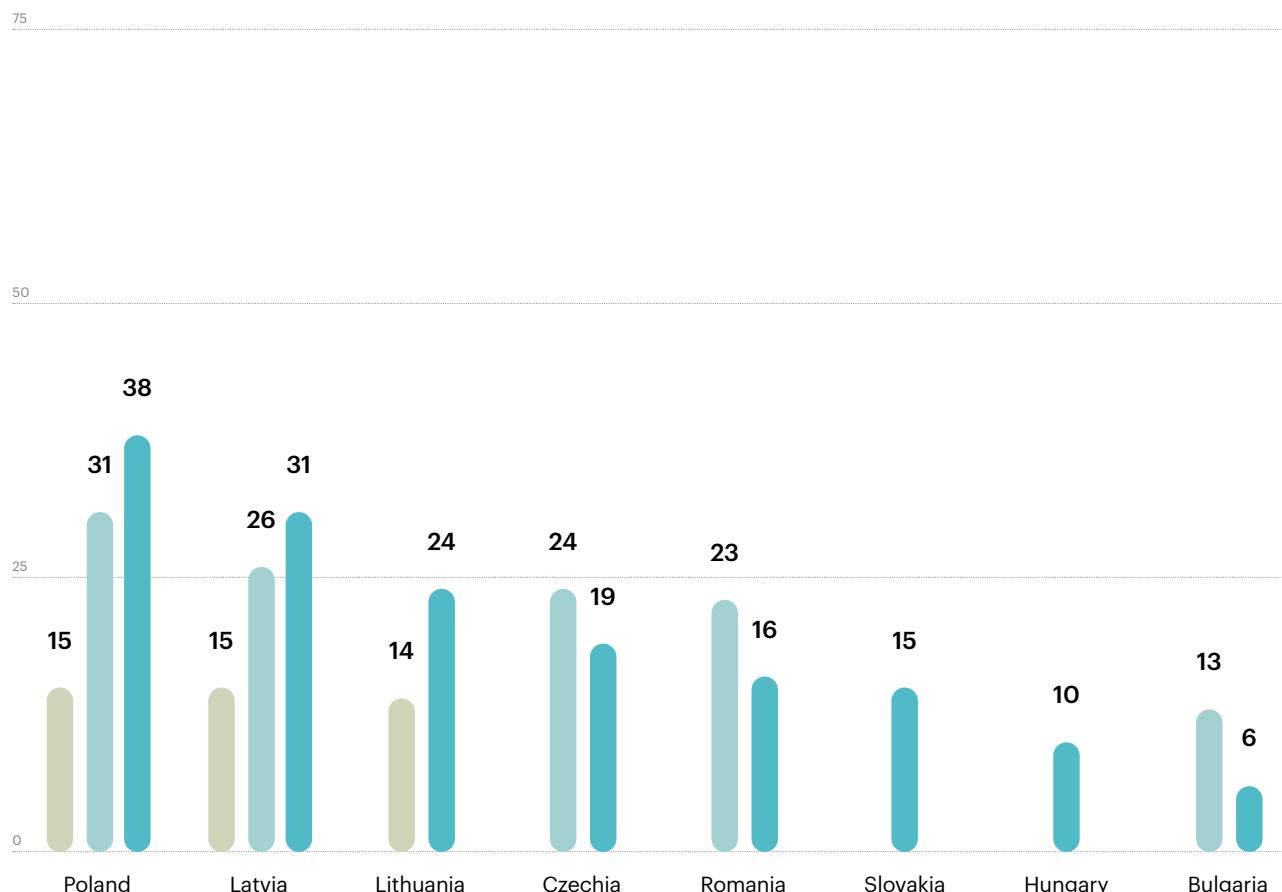
- 1 COMMON HISTORY (40%)
- 2 CULTURAL AND VALUE PROXIMITY (23%)
- 3 DEPENDENCE ON STRATEGIC RAW MATERIALS (17%)
- 4 RUSSIA IS A POLITICAL/ECONOMIC SUPERPOWER (14%)
- 5 RUSSIA HELPS BULGARIA (12%)
- 6 ECONOMIC COOPERATION AND TIES (12%)

UNITED KINGDOM: STEPPING UP WITH THE WAR

The UK as a strategic partner (%)

● 2021 ● 2022 ● 2023

The graph only visualises changes in countries that experienced shifts over 5% in public opinion.



The UK is perceived as a key strategic partner by more than a quarter of respondents in Poland, Latvia, and Lithuania. In Latvia, the identification of the UK in this light has steadily increased over the past two years, from 15% in 2021 to 31% in 2023. While the reasons for selecting the UK differ between respondents, they indicate that the Baltic states

recognise the important role of the UK in Ukraine. Poles, meanwhile, are generally more inclined towards selecting the UK over Germany than before the invasion.



Most common reasons for selecting the UK as a strategic partner

Only countries where more than 20% of respondents considered the United Kingdom to be a strategic partner and only reasons stated by more than 10% of respondents from "n" were included. Respondents could spontaneously reply with more reasons.

Poland	n=381
1 STYLE OF POLITICS (20%)	
2 THE UK IS A COUNTRY WHERE MANY POLES LIVE, WORK, OR STUDY (13%)	
3 RELIABLE ALLY, TRUSTED PARTNER (11%)	
4 CLOSE NEIGHBOUR, GOOD MUTUAL RELATIONS (11%)	
5 THE UK IS A POLITICAL/ECONOMIC SUPERPOWER (10%)	

Latvia	n=305
1 SUPPORT FOR UKRAINE (18%)	
2 RELIABLE ALLY, TRUSTED PARTNER (15%)	
3 GUARANTEE OF OUR SAFETY/SECURITY (14%)	

Lithuania	n=629
1 SUPPORT FOR UKRAINE, WOULD HELP LITHUANIA AS WELL (14%)	
2 THE UK IS A POLITICAL/ECONOMIC SUPERPOWER (13%)	
3 RELIABLE ALLY, TRUSTED PARTNER (13%)	

FRANCE: RISING STATUS IN CZECHIA



France is now regarded as a strategic partner among Czechs much more than two years ago. This preference growth came as sentiment shifted broadly away from autocratic states and came to a lesser extent at the expense of the UK. According to Kristína Šefčíková from Prague Security Studies Institute, the increased identification of France as a strategic partner in Czechia could be related to nuclear energy production, an industry supported by a growing number of Czechs¹⁴. In this respect, Czechs may perceive the French revival of nuclear energy production as a good example to emulate, especially in light of the energy crisis, with Paris starting to export electricity again after more than four decades¹⁵. The most common reasons for selecting France as a strategic partner by respondents, though, were good bilateral relations, France's status as a superpower, and the country's key roles in the EU and/or NATO.

Most common reasons for selecting France as a strategic partner

Only countries where more than 20% of respondents considered France to be a strategic partner and only reasons stated by more than 10% of respondents from "n" were included. Respondents could spontaneously reply with more reasons.

- Czechia n=277
- 1 CLOSE NEIGHBOUR, GOOD MUTUAL RELATIONS (17%)
 - 2 FRANCE IS A POLITICAL/ECONOMIC SUPERPOWER (17%)
 - 3 KEY MEMBER OF NATO/THE EU (16%)
 - 4 ECONOMIC COOPERATION AND TIES (12%)

CHINA: ONLY IN HUNGARY



Among CEE countries, China is only perceived to be a significant strategic partner in Hungary - by a quarter of respondents. Perceptions on the importance of economic cooperation and trade appear to be driving this view, with Beijing becoming an increasingly important trading partner for Budapest in recent years.¹⁶



Most common reasons for selecting China as a strategic partner

Only countries where more than 20% of respondents considered China to be a strategic partner and only reasons stated by more than 10% of respondents from "n" were included. Respondents could spontaneously reply with more reasons.

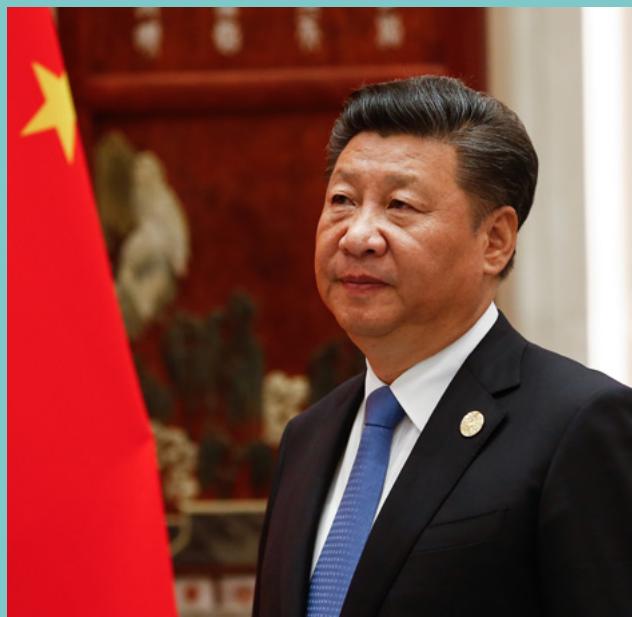
- Hungary n=240
- 1 ECONOMIC COOPERATION AND TIES (47%)
 - 2 CHINA IS A POLITICAL/ECONOMIC SUPERPOWER (10%)

DEMOCRATIC VS. AUTOCRATIC LEADERS



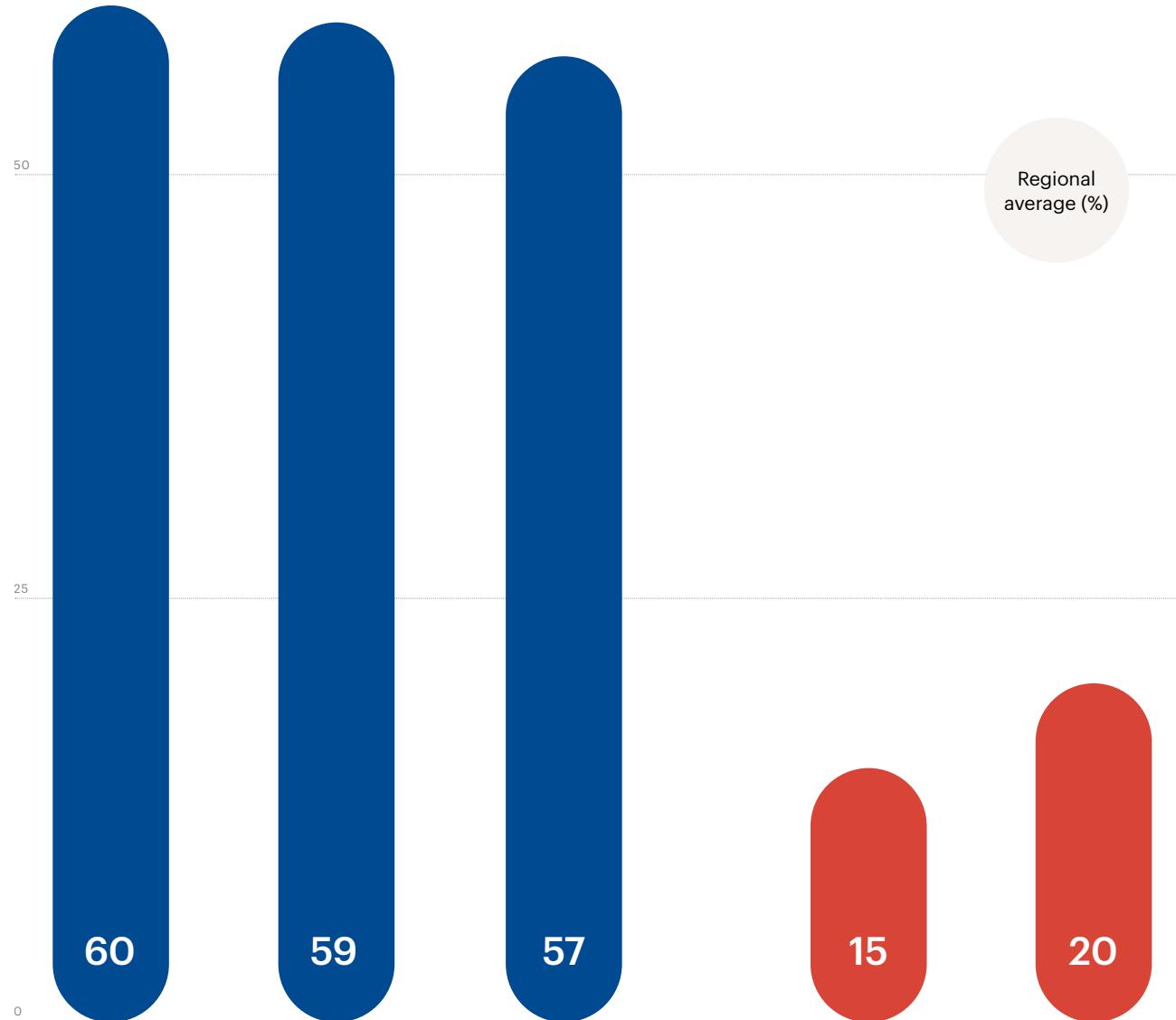
The favourable attitudes of selected political leaders reaffirm the inclinations of the CEE region towards democratic countries over non-democracies, with Volodymyr Zelensky, Emmanuel Macron, and Joe Biden largely perceived positively across the region. While the overall perceptions have remained, on average, nearly unchanged since 2022, the insight into individual countries reveals that the favourability scores for the US and Ukrainian presidents have seen both positive and negative shifts throughout CEE. Perceptions of Vladimir Putin, meanwhile, remain in the doldrums following a significant drop in popularity in 2022. Xi Jinping is now more broadly known in the region – but that increased recognition

has translated into more negative views towards the Chinese president.

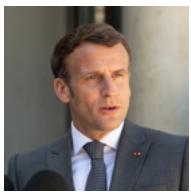


Roughly 6 in 10 respondents have a positive view on democratic leaders, while only about 2 in 10 view non-democratic leaders in a positive light.

POSITIVE PERCEPTIONS OF POLITICAL LEADERS



Volodymyr
Zelensky



Emmanuel
Macron



Joe
Biden



Vladimir
Putin



Xi
Jinping



Volodymyr
Zelensky

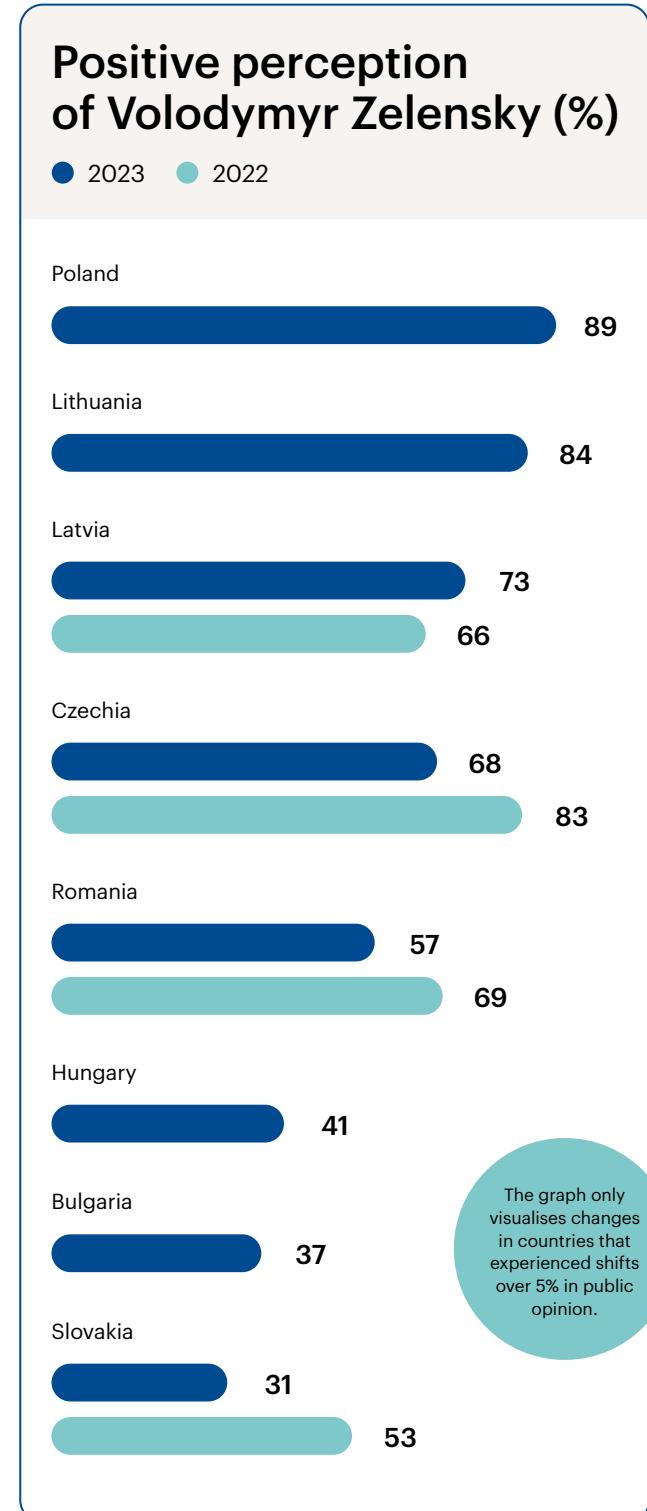
President
of Ukraine

"The protracted war, strained economic situation, and uncertain prospects have lowered the overall interest of Czechs in the situation in Ukraine and has potentially impacted their perceptions of Zelensky. As a symbol of the Ukrainian struggle, Zelensky has also become a target of claims that he is trying to drag the Czech Republic, along with the rest of NATO, into a war."

Kristína Šefčíková,
Prague Security Studies Institute

"Public opinion about Zelensky in Poland is closely tied to the ongoing war. Before Russia's full-scale invasion, he was not as popular or even known by many. His actions, especially during the first months of the invasion, were widely covered by the media and received admiration and respect among Polish society, including his commitment to stay in Kyiv despite the threat of a Russian takeover. He is broadly considered to be a true statesman among Poles."

Pawel Terpilowski,
Demagog.pl





**Emmanuel
Macron**
President of France

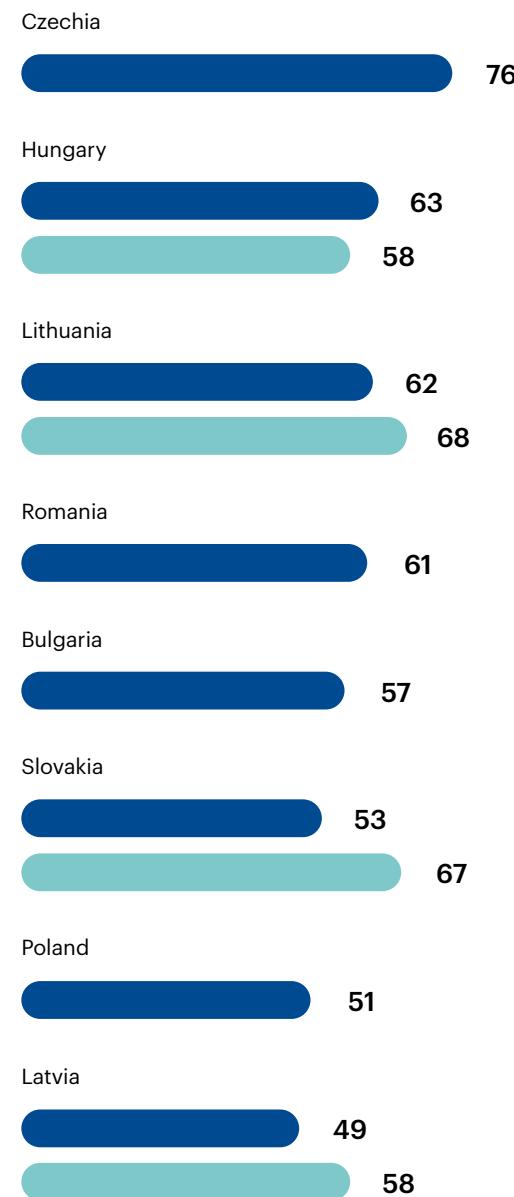


"The main factor that may have contributed to the improved perception of France is the visit of former Prime Minister, and former presidential candidate, Andrej Babiš, to French President Emmanuel Macron just three days before the first round of the Czech Republic's presidential elections. While France stated that the meeting was not an endorsement of Babiš's candidacy, he posted a photo with Macron on Twitter and referred to him multiple times as a "friend". At the same time, to further solidify Czech-French cooperation, Emmanuel Macron also met with Petr Fiala in October and with newly elected president Petr Pavel, which may reaffirm his popularity also among supporters of the current administration."

Kristína Šefčíková,
Prague Security Studies Institute

Positive perception of Emmanuel Macron (%)

● 2023 ● 2022



The graph only visualises changes in countries that experienced shifts over 5% in public opinion.



**Joe
Biden**
President
of the USA



"The favourable view of Joe Biden among Romanians has increased by 12 percentage points over the past year, per the GLOBSEC data. The boost in public opinion for the US president could be connected to his strong stance against Russia's aggression in Ukraine. Biden's steadfast support for Ukrainians likely contributed to the belief that this region will not be left behind if assistance from Washington is ever needed. Further research could examine this change in perception and its potential impact."

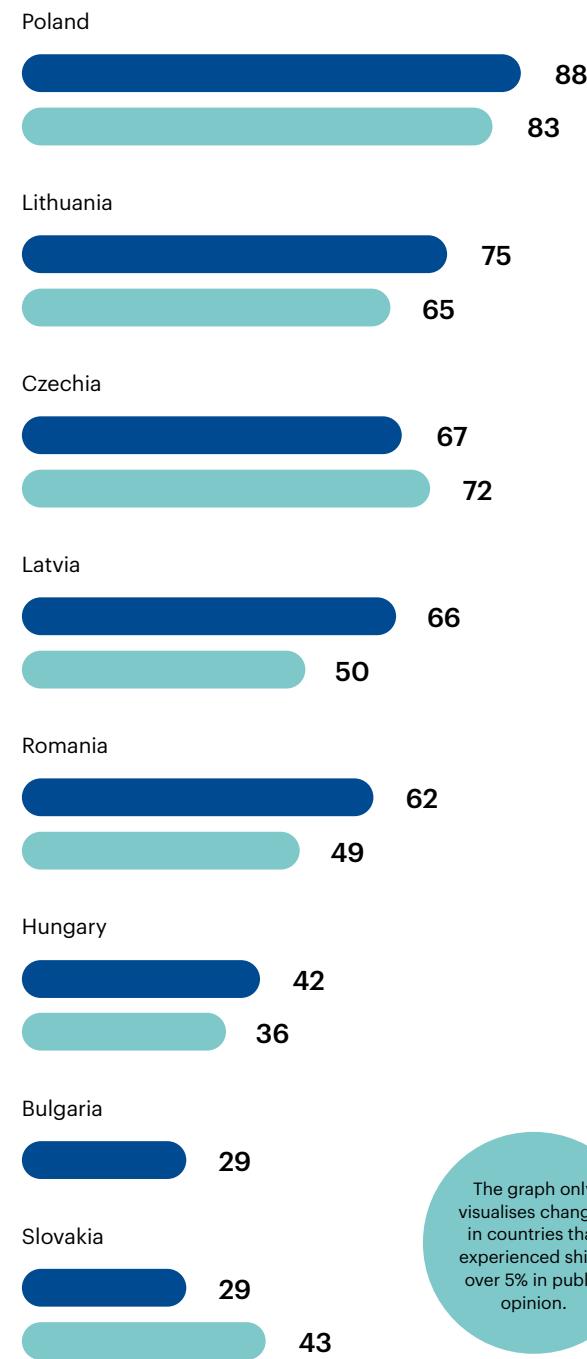
Elena Calistrut,
Funky Citizens

"The decline in positive perceptions of the US President goes hand in hand with other trends identified this year in the country. A considerable share of respondents fell victim to manipulative and false narratives spread by actors trying to undermine Slovakia's transatlantic bond and democracy and feature the US in a negative light. At the same time, Biden's spike in popularity in 2021, with 56% of Slovaks perceiving him favourably, was above average for a US president in Slovakia. Joe Biden is still far more popular than Donald Trump was in 2019."

Dominika Hajdu,
GLOBSEC

Positive perception of Joe Biden (%)

● 2023 ● 2022



The graph only visualises changes in countries that experienced shifts over 5% in public opinion.



Vladimir Putin
President of the Russian Federation

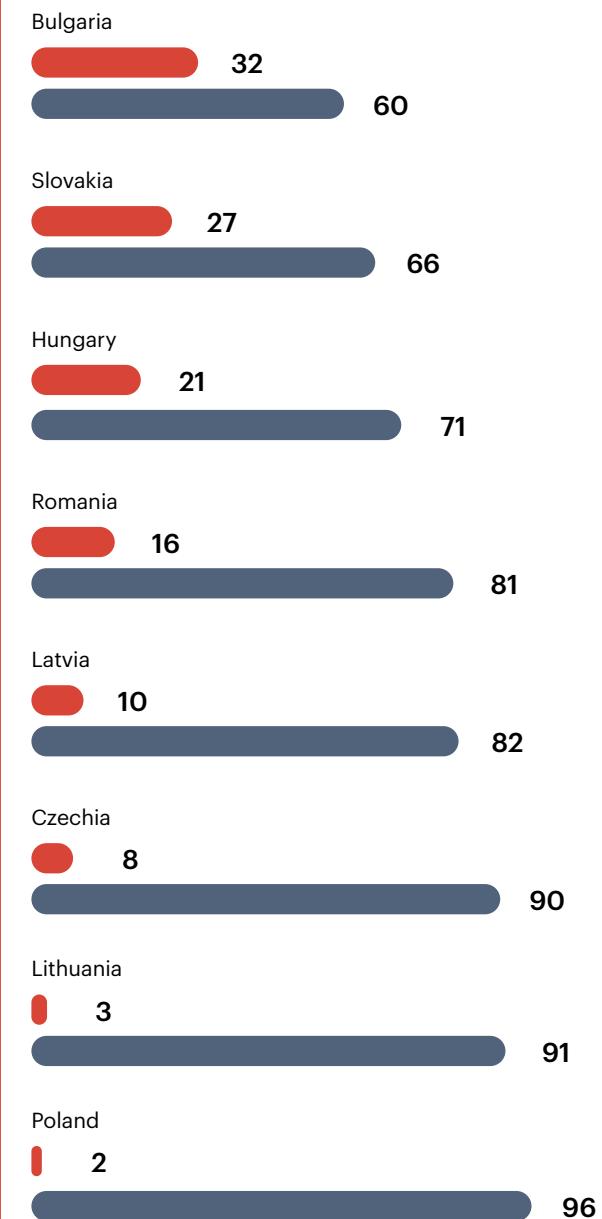


"Despite the Kremlin's war in Ukraine, Putin still enjoys high approval ratings in Bulgaria compared to other European countries. This is partly due to the prevalence of Russian propaganda in Bulgaria, which reinforces pro-Russian sentiment and precludes objective public debate on the issue. As a result, Bulgarians remain divided on their opinions about the conflict, including even the question concerning who is responsible for starting the war."

Rumena Filipova,
Institute for Global Analytics

Perception of Vladimir Putin (%)

● Positive ● Negative



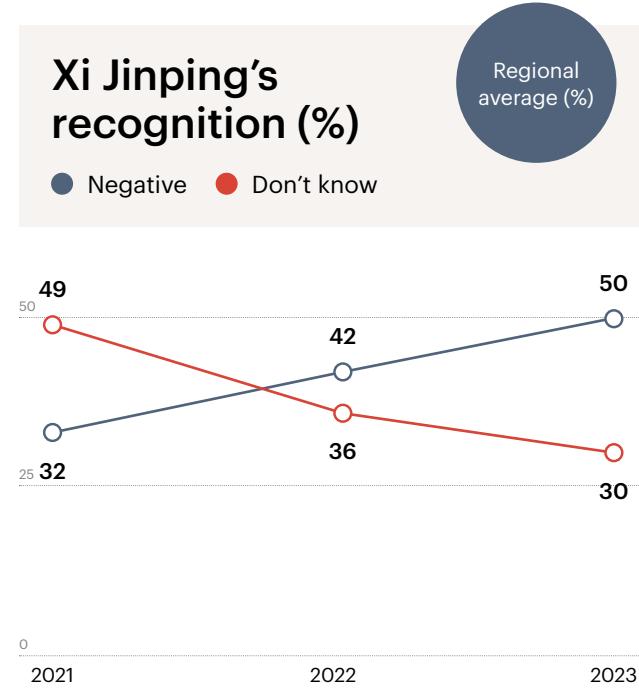
Xi Jinping
President of China



Since 2021, Xi Jinping's recognition has risen considerably across the region, but this greater familiarity has only translated into a rise in negative perceptions about the Chinese president. This may be caused by the Beijing's indirect alignment with Russia over the war in Ukraine, reaffirmed by Xi Jinping's visit to Moscow in March 2023. Also, in 2022, the continued diplomatic dispute between Lithuania and China over Taiwan led to Chinese economic coercion and a trade dispute, which was eventually taken over by the EU,¹⁷ increasing attention directed towards China's foreign policy. Negative perceptions towards Beijing among CEE countries have soared especially in Latvia, Lithuania, and Czechia. Bulgaria, at 25%, currently espouses the lowest level of unfavourable views against China's leader. That said, 40% of Bulgarians either are still unaware of who Xi Jinping is or are unable to express an opinion about him.

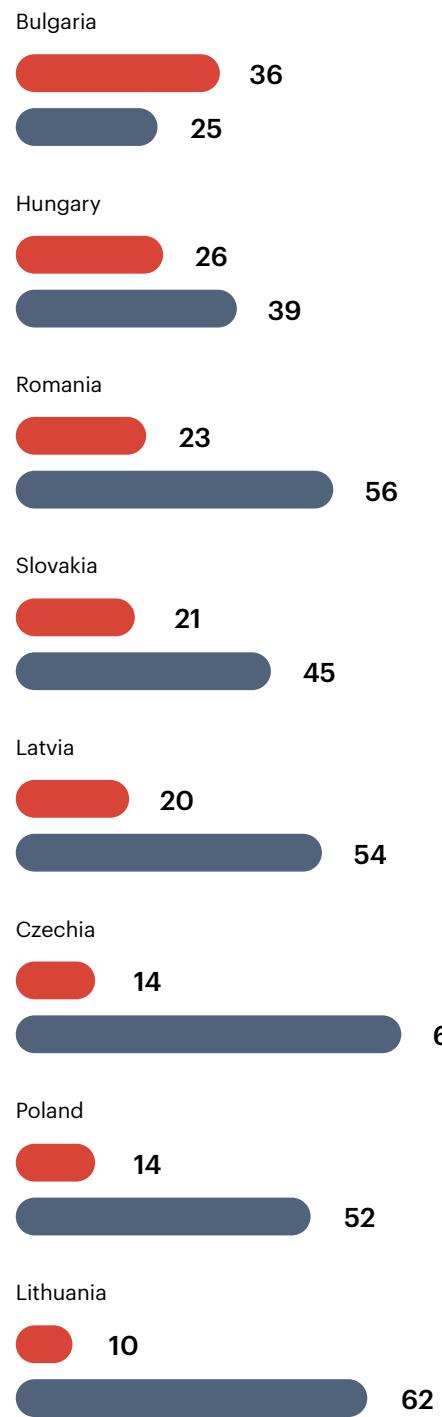
Xi Jinping's recognition (%)

● Negative ● Don't know



Perception of Xi Jinping (%)

● Positive ● Negative



EUROPEAN UNION: STABLE SUPPORT



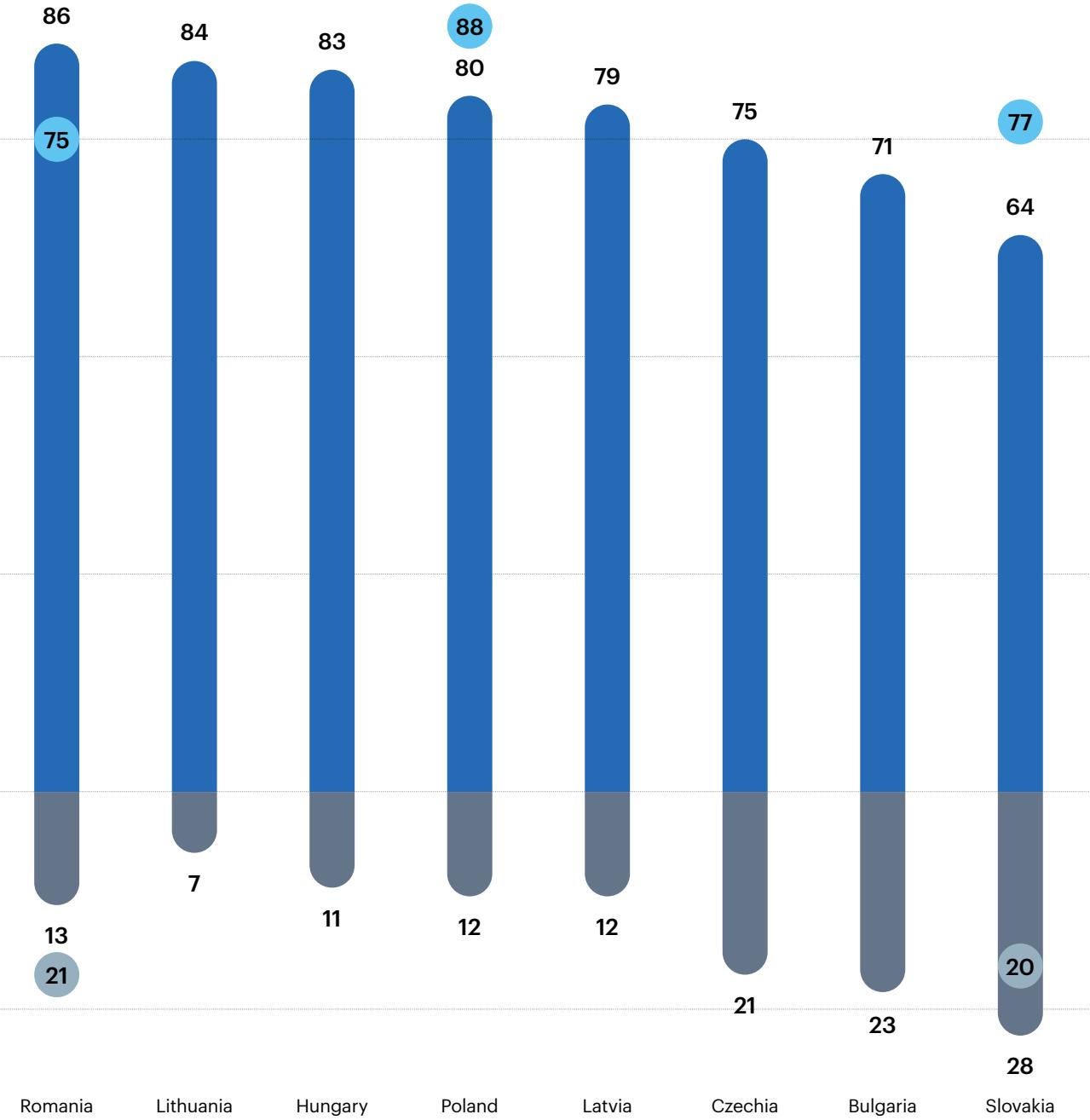
GLOBSEC Trends survey data has consistently shown widespread support for EU membership across the CEE region. The recognition of the need for EU membership is widespread even across societies with greater proneness to believe disinformation or stronger pro-Russian tendencies.

78%
of CEE
respondents
support EU
membership of
their country.

STAY OR LEAVE?

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 ● 2022 ● 2023 Leave ● 2022 ● 2023

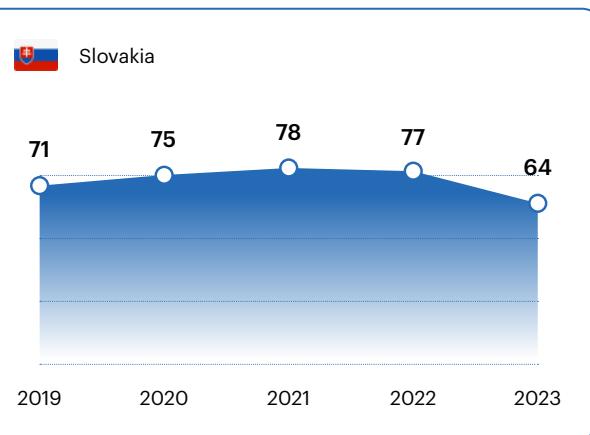
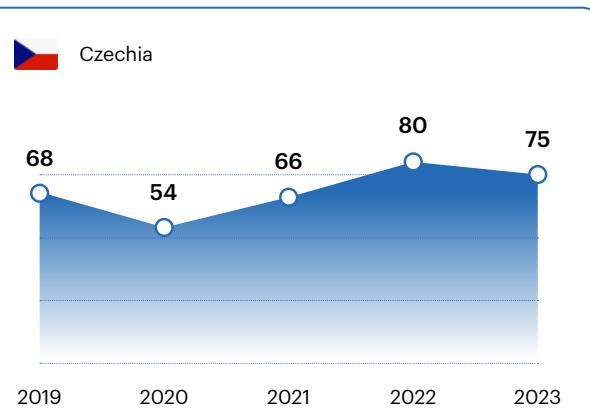
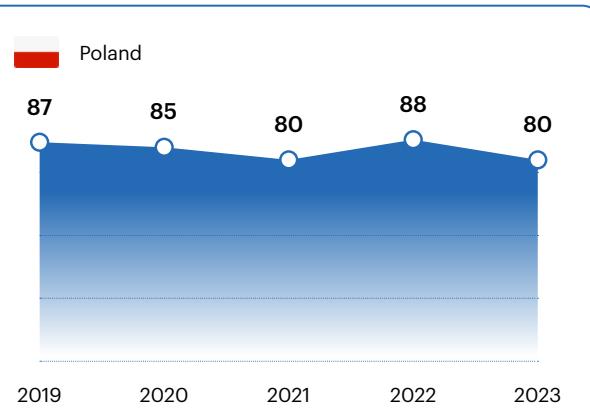
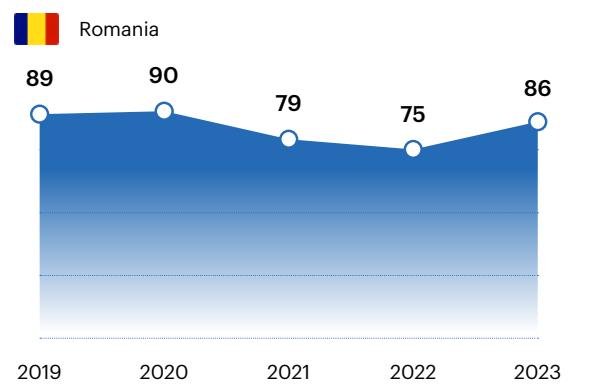


The graph only visualises changes in countries that experienced shifts over 5% in public opinion.

SUPPORT FOR EU MEMBERSHIP

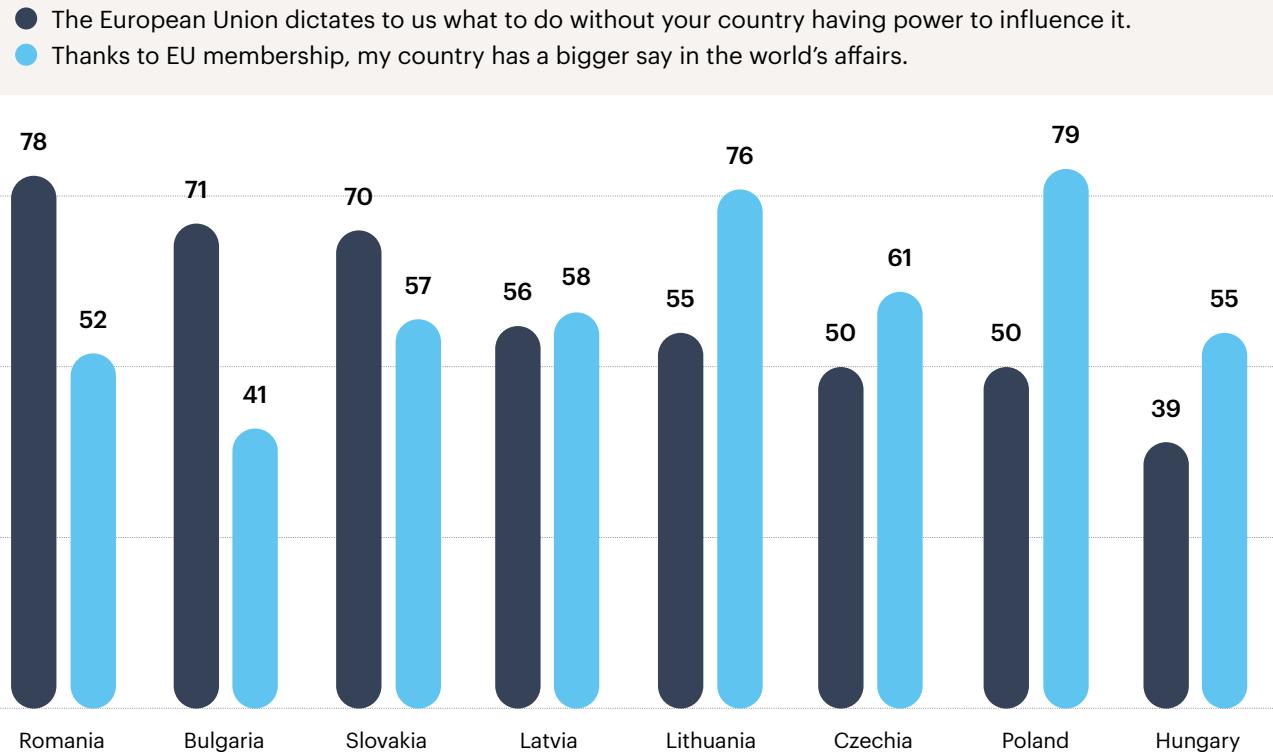
Support for EU membership has remained high throughout the CEE region, confirming the importance of the bloc for regional prosperity and security. In most countries, the support has remained relatively stable and unchanged from previous years. Some of the declines can be viewed in the context of sharper spikes that occurred in 2022 following Russia's invasion of Ukraine, a development that strengthened the realisation about the benefits of EU and NATO membership for many.

Support for EU membership remains high across the region but declined in Slovakia and Poland.



EU PARADOX

Belief in narratives about the EU (%)



"Most Bulgarians support EU membership - mainly for instrumental reasons such as travel and work opportunities rather than values-based attachments to the Union's norms of democracy and freedom of expression. Despite some challenges from politicians and civic leaders, many still believe that Bulgaria lacks a meaningful role in international relations and should maintain a low profile."

Rumena Filipova,
Institute for Global
Analytics

While most respondents throughout the region recognise their countries gain a stronger say in world affairs through the EU, this realisation does not correlate either with support for EU membership or the size or population of respective countries. These beliefs appear rather influenced by the communication tone of political leadership in different countries in discussing their work, position, and influence at the EU level.

At the same time, the dissemination of disinformation that uses the EU as a scapegoat for domestic problems has also created an unfavourable perception of the EU among majorities of respondents everywhere apart from Hungary.

INTRODUCTION OF THE EURO



In countries which have not yet adopted the EU currency, the narrative that the euro could infringe on their sovereignty or impoverish their economy is commonly deployed to undermine its adoption. This narrative, tested on respondents in Bulgaria, Poland, and Romania, finds strong resonance among majority in all three countries.

The introduction of the euro will infringe on our country's sovereignty and impoverish our economy. (%)

- Agree
- Disagree
- Don't know

Bulgaria



Poland



Romania



THE EURO CURRENCY IS A REGULAR TARGET OF MISINFORMATION ACROSS THE REGION.

DEMOCRACY: THE CONCEPT WE AGREE ON

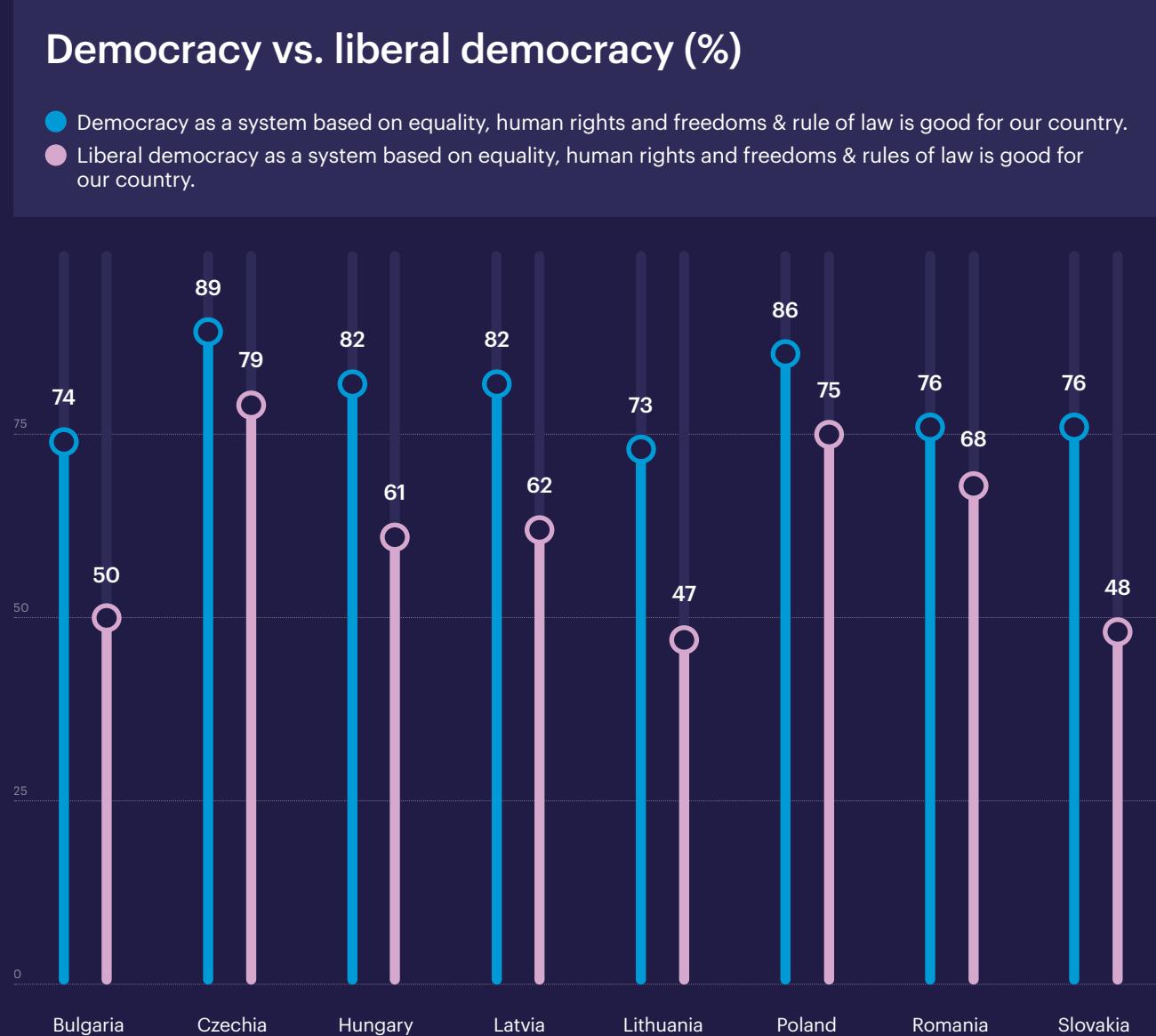


Democracy as a concept enjoys overwhelming support among 4/5 of the respondents in the CEE region. When it comes to certain nuances and the guarantee of specific rights for all, however, there are major differences across countries. Czechia and Poland are the most resilient towards disinformation narratives attacking democratic values and principles, whereas Bulgaria, Lithuania, and Slovakia appear to be most vulnerable. The findings demonstrate that stronger

fears of the unknown identified in Slovakia and Bulgaria in prior GLOBSEC polls,¹⁸ support for traditional conceptions of society, and the exploitation of polarising topics within domestic political discussions are more decisive factors than, for example, religion in shaping these views.

80%
in CEE think
democracy is a
good system of
governance for
their country.

STABLE SUPPORT FOR DEMOCRACY



Democracy as a system of governance is held in high regard in CEE. Since the topic was first polled as part of GLOBSEC Trends in 2020, approximately 80% of respondents in the region have consistently indicated that they view democracy as a "good system" of governance. This support demonstrates that

if utilised in a broader context of a form of government that protects human rights and the rule of law, resounding majorities across the region favour it. Despite differences and fluctuations between and within countries, the overwhelming support for democracy indicates that the rise of some leaders with authoritarian

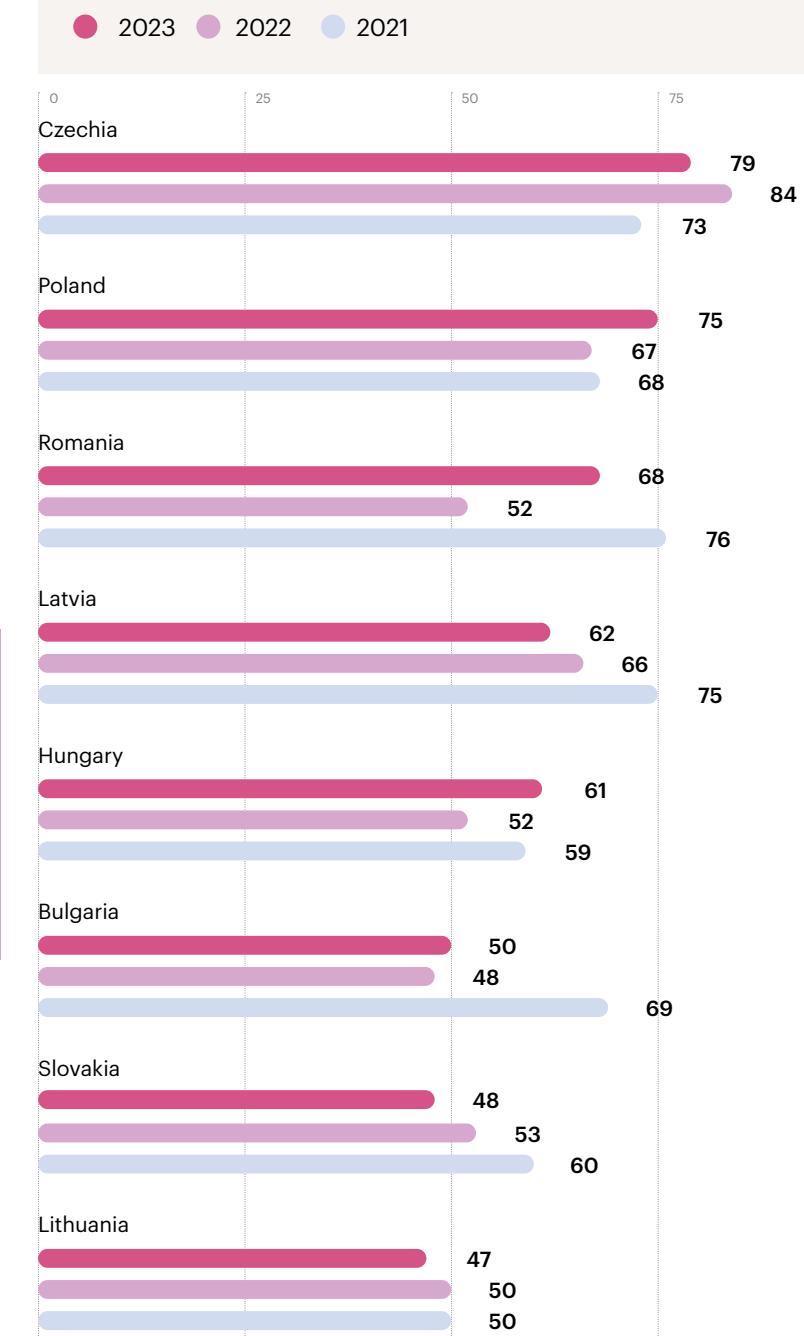
tendencies does not necessarily mean that citizens desire an alternative system of governance. It can be rather seen as a form of protest against specific governments and/or their policies, or the lack of them, among certain segments of the population.

DEMONISING LIBERALISM

Over the past decade, both domestic and foreign malign actors have used the term "liberalism" to demonise human rights activists and Western democracies in a bid to polarise societies and single out specific actors within them as the out-group. The effect of these efforts can be seen in the polling gap between support for "democracy" and "liberal democracy", even when the same definition for each is surveyed. The two questions were posed within a set of nine randomly ordered statements to ensure the most spontaneous response possible. The effect of these narratives and their translation into perceptions is apparent in Bulgaria, Latvia, and Slovakia. There appears to be little resonance, meanwhile, among Czechs and Poles.

61% in CEE perceive liberal democracy as good for their country.

Those who agreed that "Liberal democracy as a system based on equality, human rights and freedoms, rule of law is good for our country." (%)



ACCEPTANCE OF LGBTI+ PEOPLE'S RIGHTS

Rights of LGBTI+ people (such as right to marriage) should be guaranteed (%)

● Agreed in 2020 ● Agree ● Disagree ● Don't know

The graph only visualises changes in countries that experienced shifts over 5% in public opinion.



Disinformation campaigns have long targeted LGBTI+ individuals and advocates for equal rights for sexual minorities. The demonisation of LGBTI+ people by spotlighting extreme cases, simplifying the issue, and dehumanising real people into the “LGBTI+ agenda” term have been complemented by fabricated stories exploiting fear of the unknown across the region.¹⁹

Disinformation campaigns against LGBTI+ people often deploy the terms “liberalism” or “liberals” to lambast groups supposedly pushing their “agenda” into different parts of society, including the government, education, etc. These examples were identified, among others, by GLOBSEC’s monitoring of 2020 parliamentary elections in Slovakia.²⁰

The survey data on perceptions about the LGBTI+ people illustrates certain dynamics dividing the region into more accepting and less tolerant countries. Czechs, Hungarians, and Poles, for their part, largely disagree with disinformation narratives seeking to demonise LGBTI+ people and agree with the full guarantee of rights, including the right to marriage.

Hungarians do not adhere particularly well to the cabinet’s anti-LGBTI+ narratives, with 56% of respondents agreeing that LGBTI+ rights should be guaranteed. Looking into country-specific narratives polled this year, only 20% of respondents believe that the EU wants Hungary to allow LGBTI+ organisations to hold sensitisation classes in kindergartens and schools before the country can access EU funds, which has been one of the key pillars of the government’s narrative over the past year.²¹ This indicates that Hungarians are likely to consider other reasons to be behind the suspension of EU subsidies allocated to the country, such as anti-corruption measures, as a Publicis poll found in 2022.²²

Yet Bulgarians, Lithuanians, Romanians, and Slovaks are more inclined to believing disinformation narratives and disregard LGBTI+ people’s right to equality.

Two major findings can be concluded from this data. In most countries, support for LGBTI+ rights increased over the past two and a half years.

The decline in Slovakia is an unfortunate exception, especially in light of a terrorist attack that killed two LGBTI+ people in October 2022. Secondly, government campaigns for conservative values, which are undoubtedly present in both Hungary and Poland, are no guarantee that public attitudes will follow. The openness of respondents towards accepting

LGBTI+ is an immoral and decadent ideology (%)

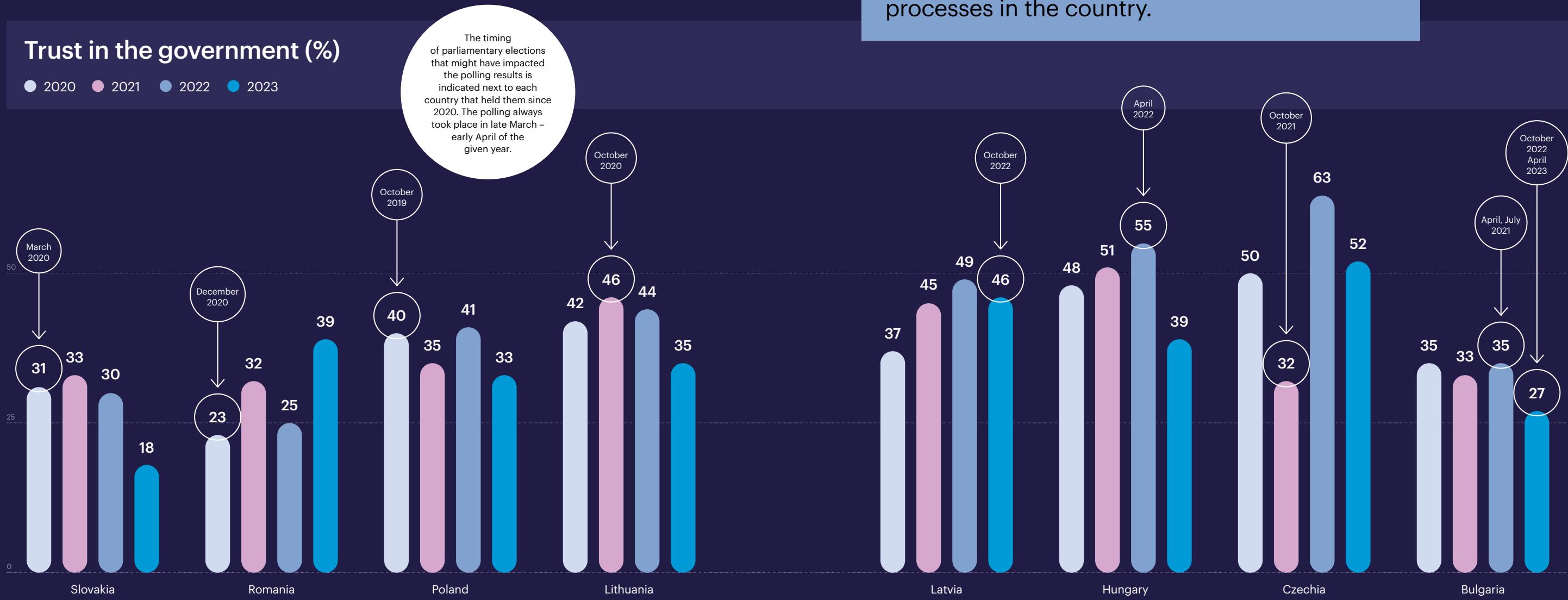
● Agreed in 2020 ● Agree ● Disagree ● Don't know



SUPPORT FOR THE RIGHTS OF LGBTI+ PEOPLE HAS INCREASED IN MAJORITY OF CEE COUNTRIES, BUT REMAINS LOW IN 5 OF 8.

IN GOVERNMENT WE (DIS)TRUST

53% in Slovakia fear that the elections taking place in September 2023 will be manipulated, a narrative often pushed by anti-establishment parties to fuel doubts about democratic processes in the country.



Compared to 2022, trust in government declined in all analysed countries except for Romania. Uncertainty related to the Russian invasion of Ukraine, meanwhile, likely contributed to the boost in trust levels that governments enjoyed across several countries in 2022. This spike was most evident in Czechia, where a new government was elected in October 2021. The declines of trust in the Czech

Republic, Latvia, and Poland can, therefore, be treated more as a reversion to the mean. The shift could also reflect political attitude changes and the various crises that the countries have been facing.

Hungary's decline, for its part, can be explained by the fact that the country is currently suffering from the highest level of inflation in the EU²³ with the government's efforts

to blame the EU showing only as partially successful. Political Capital's poll from 2022²⁴ revealed that 53% of Hungarians believed sanctions were causing high energy prices, but only a third blamed sanctions for skyrocketing food prices. The impression that Hungarians are only experiencing hardship due to external factors and the government is protecting them might be starting to crack.

"The peak in trust in 2022 could have been spurred by Fidesz's electoral strategy consisting of massive financial transfers to the population via, for example, income tax returns."

Patrik Szicherle,
GLOBSEC

Declining trust levels in Bulgaria, meanwhile, have likely been influenced by the fact that the country held its fourth parliamentary elections in two years in April 2023.

Slovakia, for its part, has recorded the lowest degree of trust in institutions over the past few years due to political turmoil within the ruling coalition – this turbulence ultimately saw

the government lose a vote of confidence, with early elections set for September 2023.

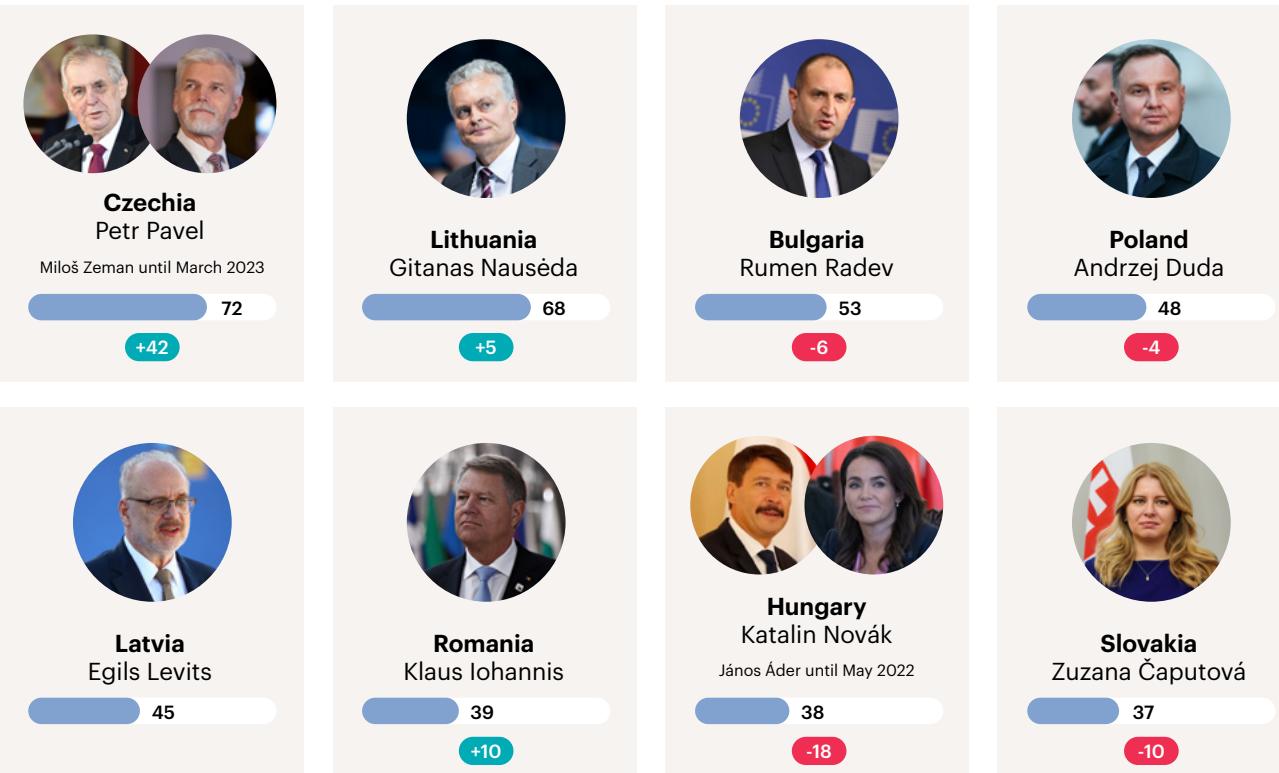
PRESIDENTS: LEADING THE WAY ON TRUST

The trust levels for presidents do not correlate with trust in governments in most countries. While in Latvia, Romania, and Hungary, the presidents enjoy nearly the same amount of trust as the governments, in the rest, societies place more trust in their presidents than governments. Only countries with significant shifts in trust over the past three years are shown in the graph below. The largest changes were measured in Czechia, Hungary, and Slovakia. The shifts in the

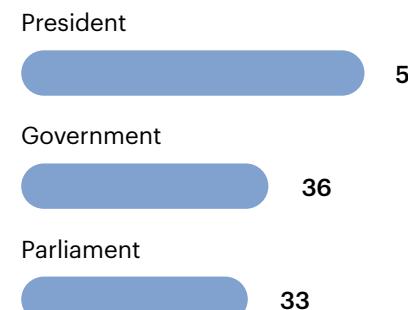
former two countries were caused by a change of presidential administrations - popularly elected in Czechia and elected by the National Assembly in Hungary. In Slovakia, a perceived "liberal" president has been a strong advocate of a need for the better protection of minorities, including LGBTI+ people, and gender equality - policies that have been subjected to attacks by both opposition and government coalition parties, underlining a gradual decline in trust over the years.²⁶

Trust in president (%)

● 2023 ● 2022 difference

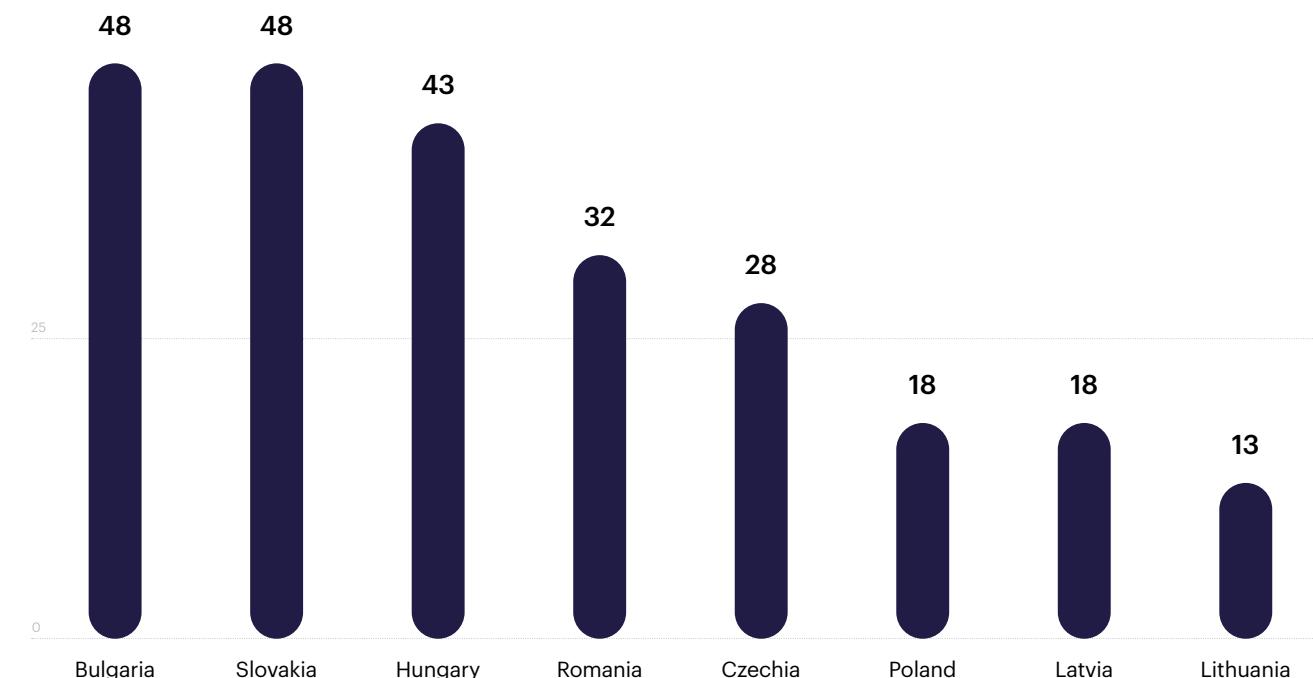


Average trust across CEE in the: (%)



PERCEPTION OF VIKTOR ORBÁN

Positive perception of Viktor Orbán (%)



Although Hungarian Prime Minister Viktor Orbán has been described as an illiberal "icon,"²⁵ his appeal is not overly strong in the CEE region. On average, 31% of respondents see him positively in the countries surveyed. The countries where Viktor Orbán shares a high level of appeal either suffer from political instability, are unlikely to support LGBTI+ rights, espouse more pro-Russian views, or display a combination of the above. As a result of factors in Hungary noted in the government trust section, which also probably contribute to lower positive perceptions of the Prime Minister, Orbán is currently more popular in Bulgaria and Slovakia than his native country.



MEDIA: TRUST MAKES A DIFFERENCE



The media sector has long been a target of public scrutiny, especially with regards to press freedom and trust vested in media outlets. The media serves as the watchdog of democracy and plays a role in ensuring that citizens can make choices based on accurate and unbiased information. The press, together with public institutions and political representatives, can contribute to maintaining citizen support for Ukraine and the West more generally - but GLOBSEC data demonstrates that



this is only possible if the public trusts the standard mainstream media. Unfortunately, many countries in the CEE region are suffering from a trust deficit in the media sector. While 52% of CEE respondents, on average, believe their media is free, only 42% trust the information they provide.

Trust in the mainstream media is key. Those who trust such outlets are considerably more likely to align themselves with EU and NATO interests.

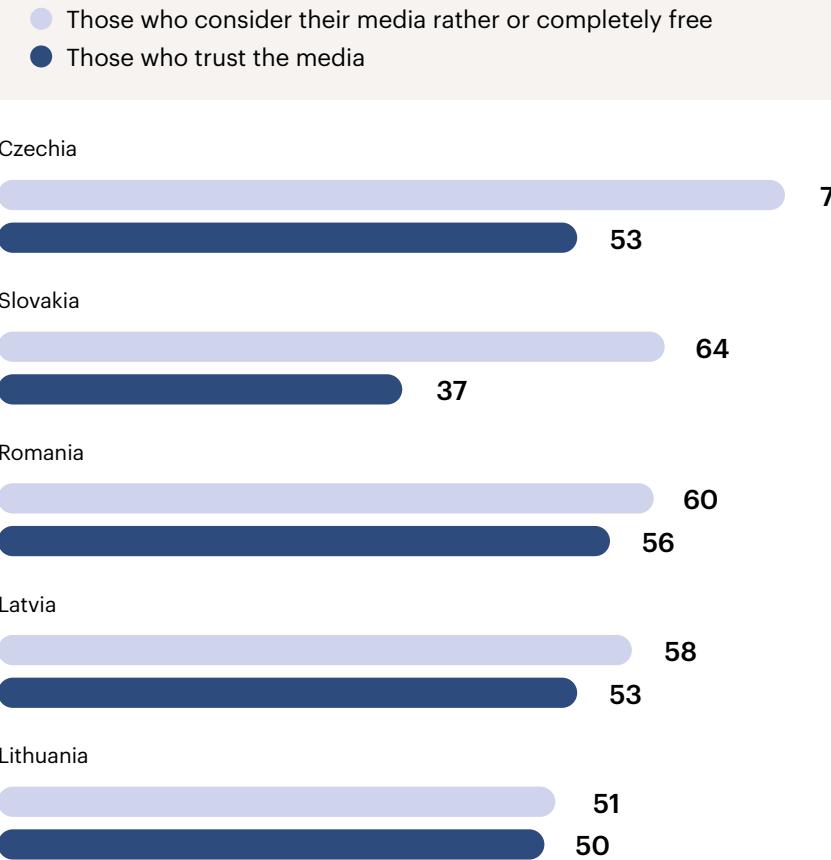
A VISIBLE TRUST DEFICIT

The perceptions of media freedom in the 8 countries largely mirror the country results of the World Press Freedom Index produced by Reporters Without Borders (RSF).²⁷ One notable exception is Romania. Though the country was only ranked 56th in 2022 by RSF, considerably lower than either Latvia or Lithuania, Romanian respondents are more likely to say their media is free than those from the two peer countries. Respondents in the two Baltic states, meanwhile, see media freedom in their countries in a somewhat worse light than the RSF ranking.

World Press Freedom Index 2022 score



Media trust (%)



There are substantial differences between perceptions of media freedom and the trust levels of respondents in the information the mainstream media provides. This finding highlights the fact that perceptions regarding media freedom do not automatically translate into higher levels of trust. The differences are especially stark in Czechia and Slovakia, where trust levels are, respectively, 19 and 27 percentage points lower than affirmative perceptions about media freedom. The gap is substantial in Poland and Hungary as well. The latter two countries are also suffering from negative assessments of media freedom by respondents, though, likely due to the well-documented government capture of the media sector in the countries.

A WILD RIDE ON TRUST

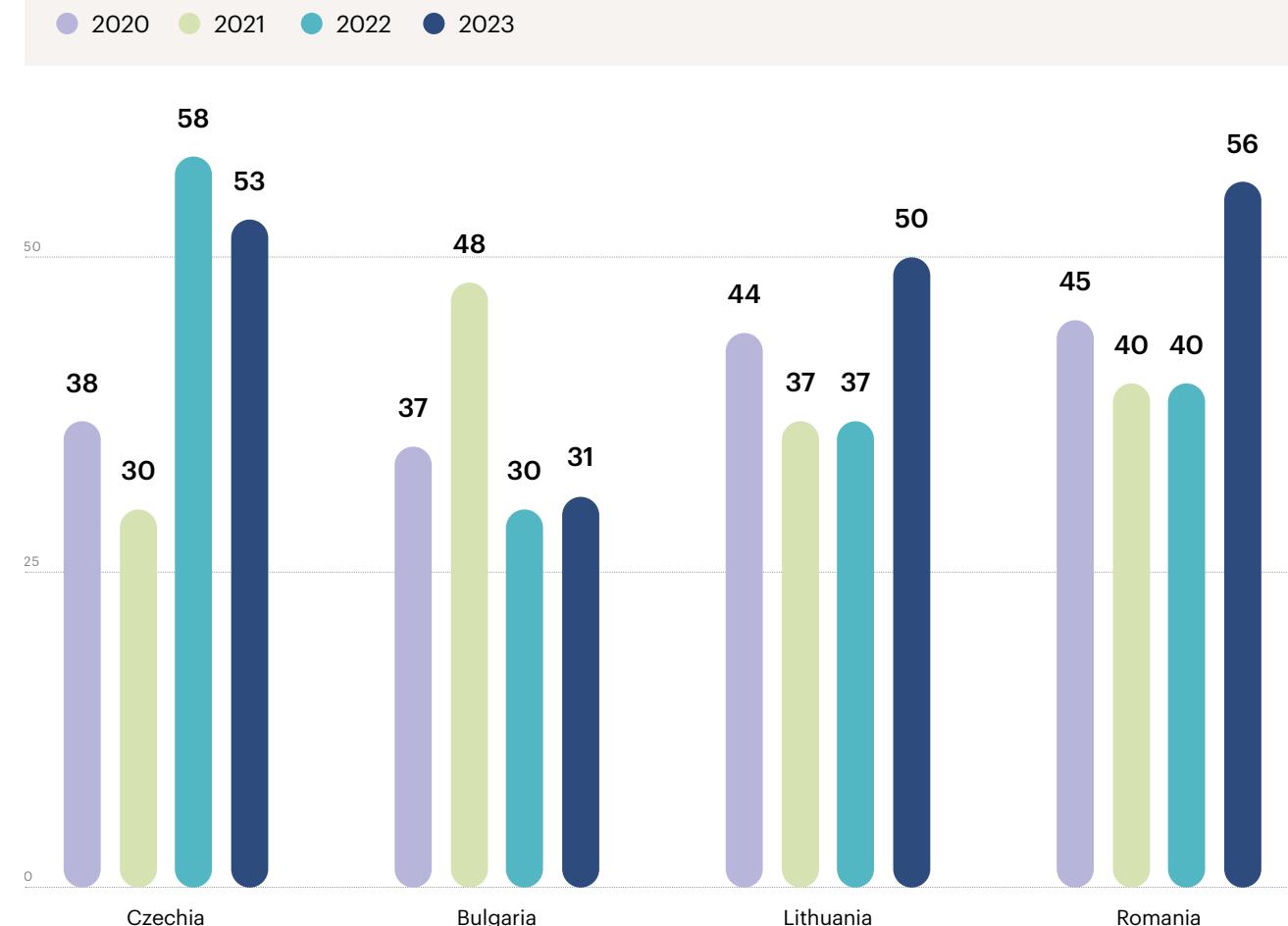
4 of 8 countries surveyed have seen a substantial shift in public trust in the standard mainstream media over the last four years. In Lithuania and Romania, mainstream media saw a significant drop during the first year of the COVID-19 pandemic but saw a spike in trust this year. This might be because the two countries have proven to be susceptible to COVID-related disinformation,²⁸ which likely created a trust deficit between the mainstream media and certain segments of their audiences during the pandemic. This gulf,

however, disappeared following coverage of the Russian invasion of Ukraine.²⁹

In Czechia, media trust skyrocketed presumably also as a result of a change in government in 2022. Czechs may favourably perceive former Prime Minister Andrej Babiš's (who controls several key media outlets in the country) loss of influence following his election defeat and ultimate inability to assume control over the Czech public broadcaster.³⁰

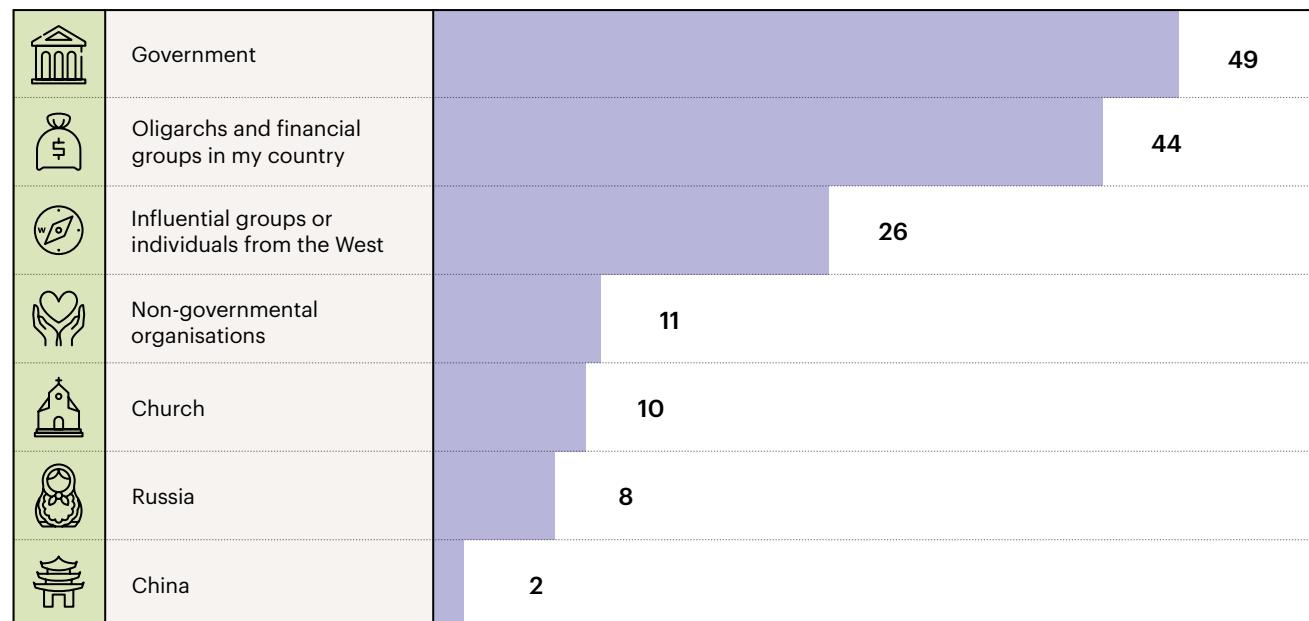
Trends are heading in the reverse direction in Bulgaria though. Following a period of rising trust through 2021, Bulgarian mainstream media saw a dramatic

Trust in the standard mainstream media since 2020 (%)



WHO INFLUENCES THE MEDIA?

Average of responses to the question “Who do you believe has the strongest influence over the media in your country?” Respondents could select at most three options. (%)



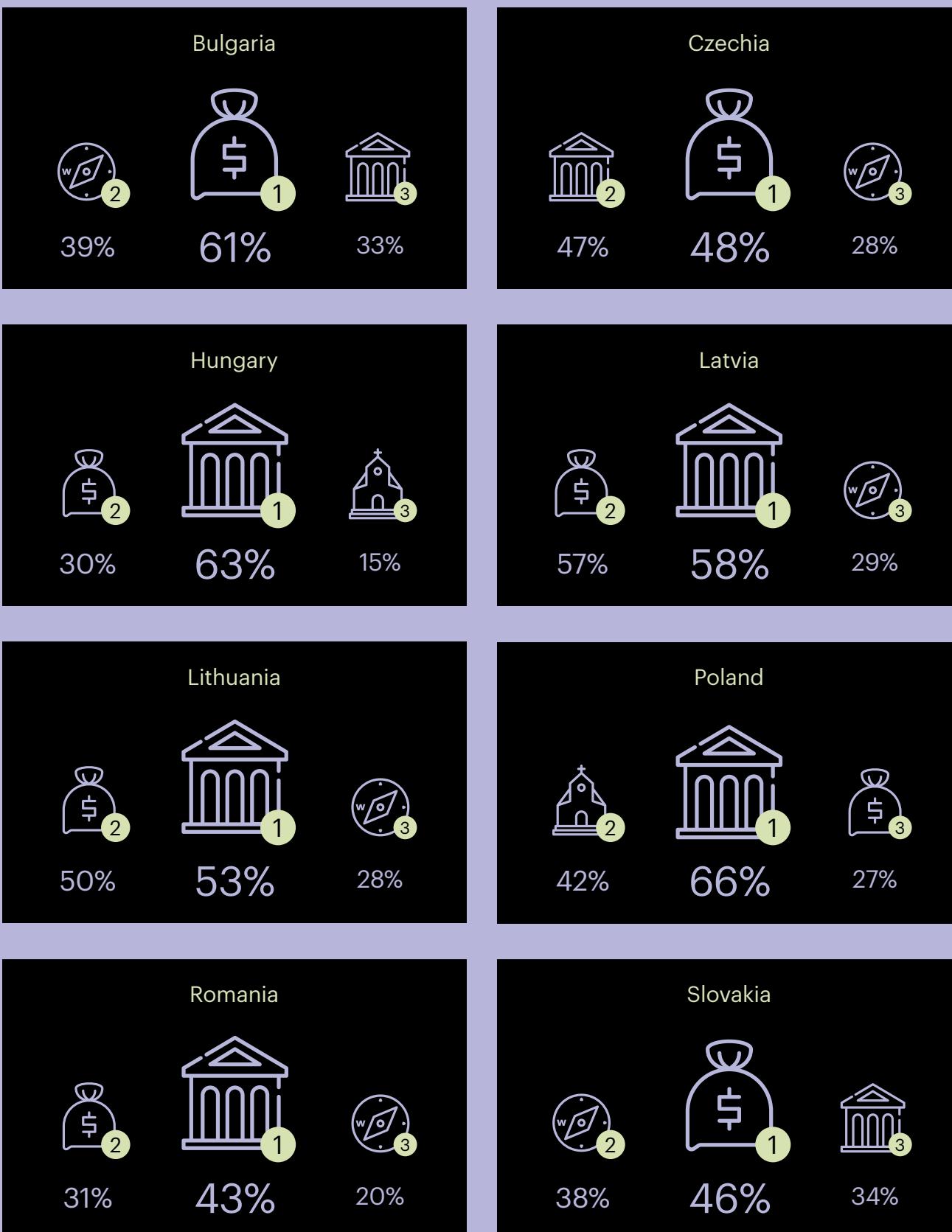
A majority among those who believe media freedom is limited also think that the press is influenced by either the government or oligarchs and financial groups in their countries.³¹

There are, however, some exceptions. Bulgarians and Slovaks listed oligarchs and financial groups as the greatest influence on the media and groups or individuals from the West came in second (government was only the third most frequently mentioned option). Meanwhile, Polish respondents rather selected government as their top source of influence and the church, which is very active in the country's politics³² and owns several media outlets, as their number two.

Comparing 2023 to 2020 data, it is apparent that respondents in the eight countries surveyed feel that governments are increasingly seeking to control

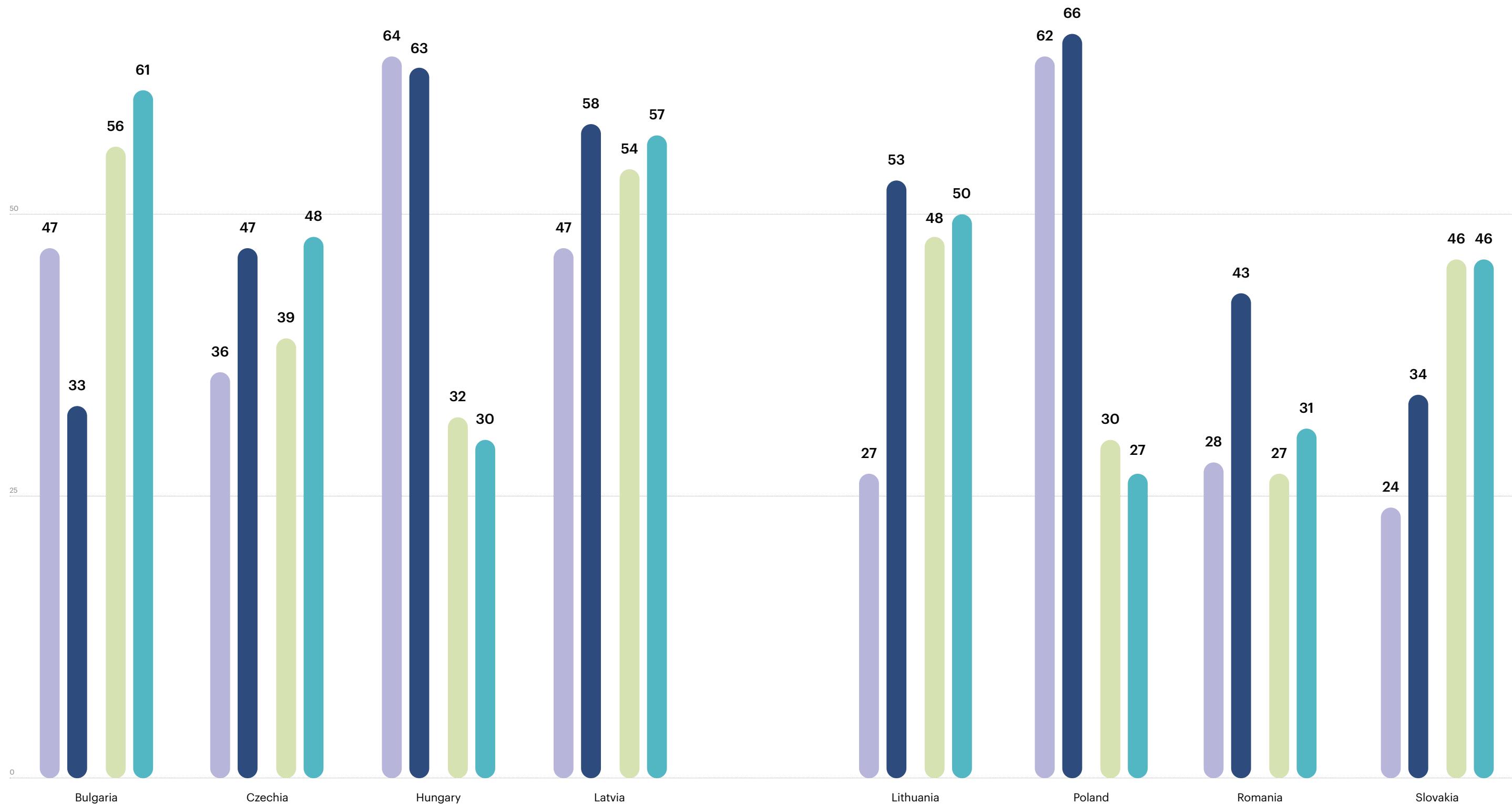
Respondents who consider their media to be “rather free” or “not free at all” were asked to indicate who they think is obstructing media freedom. The listed options were based both on real information and disinformation narratives circulating in the information spaces of the countries.

PERCEIVED INFLUENCE OVER THE MEDIA



Those who believed government or oligarchs and financial groups influenced media in 2020 and 2023. (%)

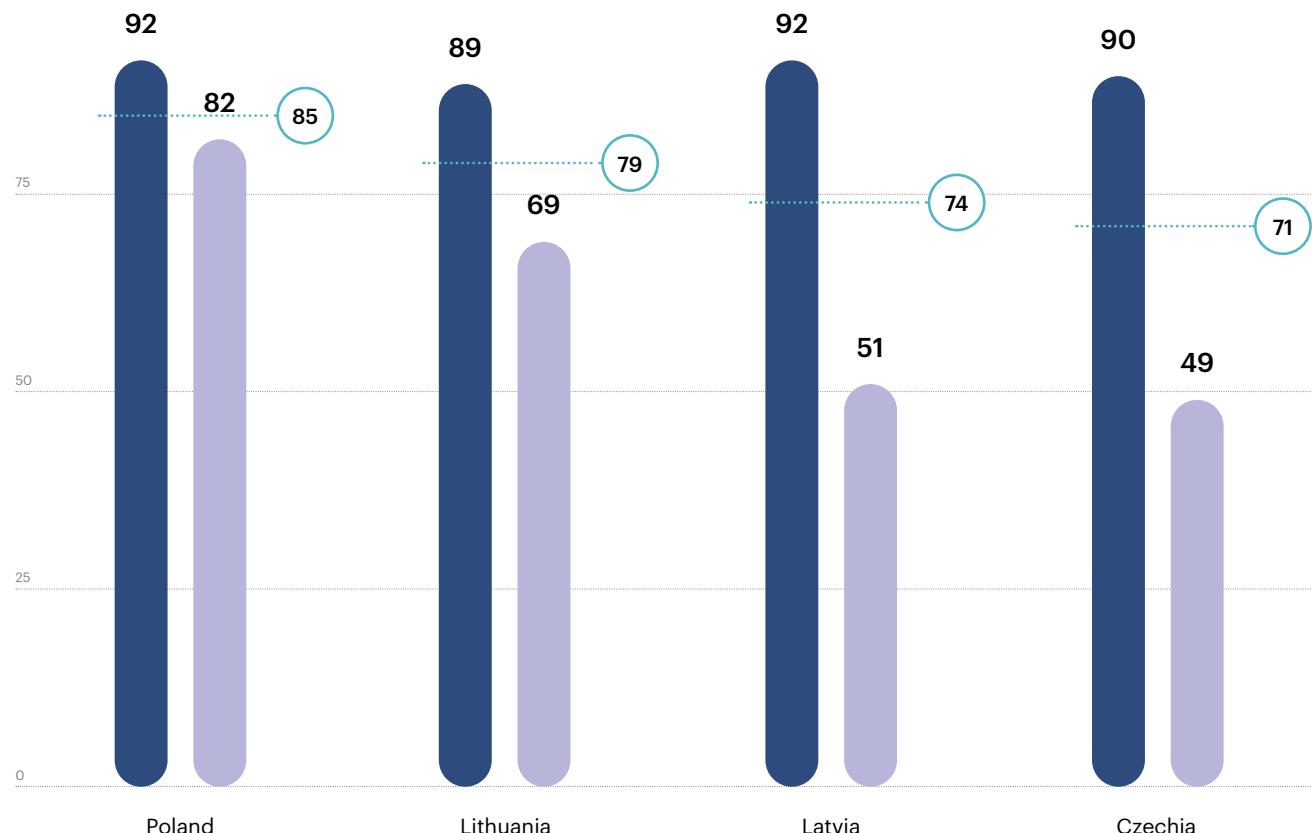
Government 2020 2023 Oligarchs and financial groups 2020 2023



TRUST MATTERS

Those who identify Russia as primarily responsible for the war in Ukraine among those who trust/distrust the media (%)

- Respondents who believe Russia is responsible for the war in Ukraine and trust the standard, mainstream media
- Respondents who believe Russia is responsible for the war in Ukraine and distrust the standard, mainstream media
- Those who believe Russia is responsible for the war in Ukraine



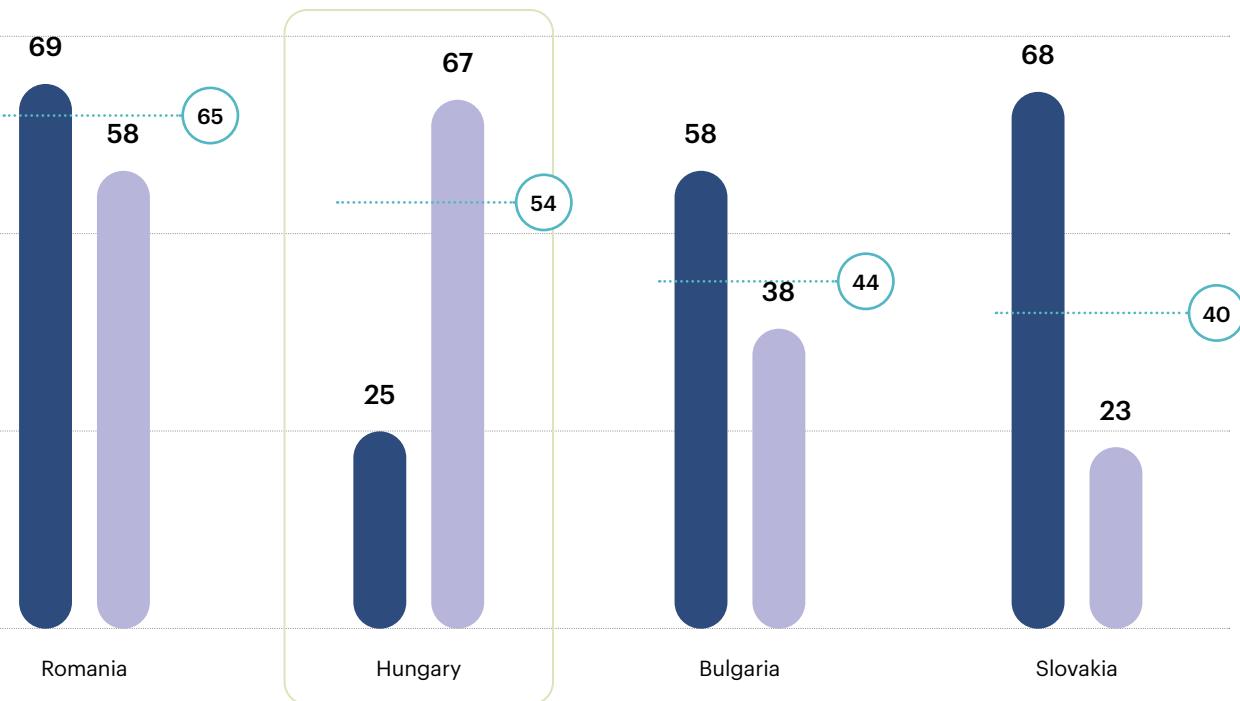
Trust or distrust in the standard mainstream media is a defining factor influencing the views of the public on a range of different topics. There are, notably, stark differences in the views of respondents dependent on whether they trust or distrust the mainstream media in their countries.

In 7 of 8 countries surveyed, those who trust the mainstream media are more likely to select Russia as the aggressor and responsible culprit for the conflict in Ukraine. Even in Poland, where the population is highly critical of the Kremlin, there is a ten-percentage-point difference, with the media trustful camp more likely to oppose Moscow.

The gap stands at over 40 percentage points in Latvia, Czechia, Slovakia, and Hungary, with the latter being a clear outlier - the distrustful stratum of respondents is more likely to blame Russia while the more Russia-sympathetic voters of the ruling party are substantially more likely to say they trust the mainstream media.

All told, though, the data suggests that improving trust in mainstream media outlets that specifically relay factual information to the population is important for shoring up support for Ukraine and the geopolitical goals of the West more generally.

Those who identify Russia as responsible for the war among respondents who trust and distrust standard mainstream media. The baseline perception is represented in the responses of those believing Russia is responsible for the war in Ukraine.



RESPONDENTS WHO TRUST THE MEDIA ARE MORE LIKELY TO IDENTIFY RUSSIA AS RESPONSIBLE FOR THE WAR IN UKRAINE EVERYWHERE EXCEPT FOR HUNGARY.

WHO'S GOING TO KEEP US HEALTHY?



When the COVID-19 pandemic took central stage in people's lives and media coverage, including disinformation outlets, healthcare emerged as a key topic of public debate. False information pertaining to health and medical issues, however, had been disseminated long before the pandemic, targeting those seeking cancer remedies, among other cures.³⁸ Although the Russian invasion of Ukraine assumed the political agenda throughout the world in 2022,³⁹ citizens are still vulnerable to disinformation concerning their health.⁴⁰ False narratives that are now broadly believed across the CEE region, in fact, require action from both the private and public sectors to stem the demand for the products of snake oil salesmen.⁴¹

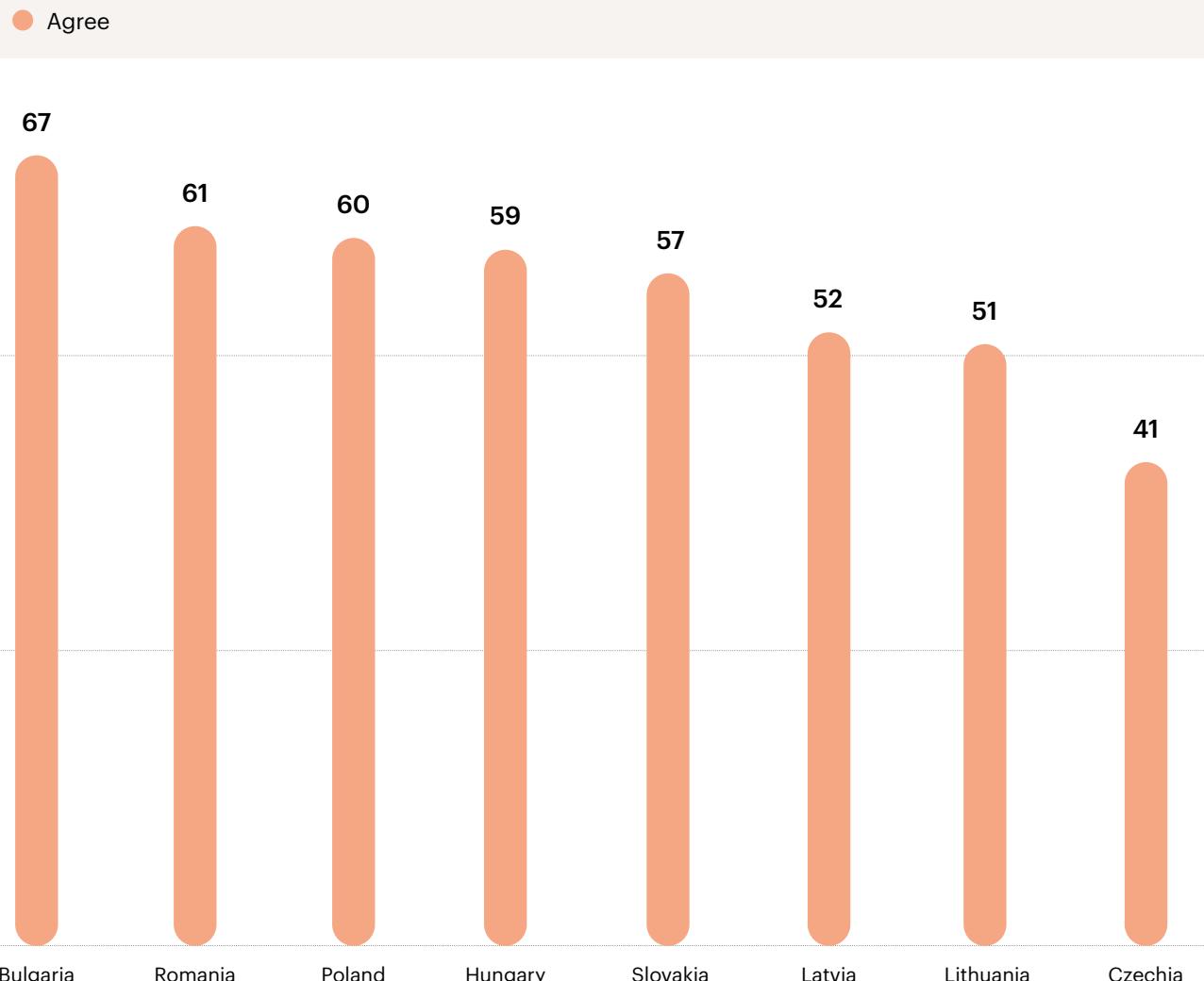


56%
in CEE believe that pharmaceutical companies hide effective treatments for diseases.

A majority throughout the CEE region believe that pharmaceutical companies are concealing effective treatment options for diseases, such as COVID-19 and cancer, to increase their profits. Even in Czechia, where respondents were the least likely to hold this belief, 41% agreed with this sentiment. These findings indicate that there is a substantial market for the sale of fake medicine claiming to offer “real” treatments to citizens globally, constituting a long-term threat to public healthcare.⁴²

Czechia, at 53%, is the only CEE country where a majority of respondents trust pharmaceutical companies to provide effective and real treatment for diseases. Czechs are also the least vulnerable to disinformation concerning healthcare.

Pharmaceutical companies hide effective, real treatment for diseases (e.g. COVID-19, cancer) because they are driven by profits. (%)



COVID-19 vaccination increases the chance of untimely deaths. (%)



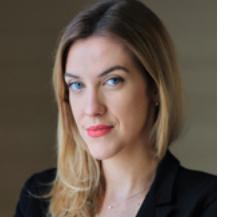
The market for allegedly “alternative” medicine is potentially very large across the CEE region, which needs to be swiftly addressed.

“In general, Bulgarians’ high vulnerability to disinformation regarding pharmaceutical companies has to do with the virulent dissemination of COVID conspiracy theories, distrust of science, and the concomitant very low vaccination rate during the pandemic.”

Rumena Filipova,
Institute for Global Analytics

Disinformation narratives specifically targeting COVID-19 vaccinations are less widespread within the region than narratives directed at pharmaceutical companies and medicine in general and primarily resonate in Bulgaria, Romania, Lithuania, and Slovakia. Over the long-term, these ploys should constitute a concern for local public and private institutions, especially if the need for further vaccination campaigns arises.

AUTHORS



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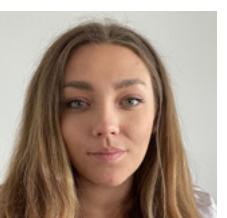
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We are thankful to our partners across the region for their valuable insights: Demagog.pl, Eastern Europe Studies Centre, Funky Citizens, Institute for Global Analytics, and Prague Security Studies Institute.

Methodology

The outcomes and findings of this report are based on public opinion poll surveys carried out in March 2023 on a representative sample of the population in eight countries: Bulgaria, Czechia, Hungary, Latvia, Lithuania, Poland, Romania and Slovakia. The surveys were conducted on a sample of 1,000 respondents per country (8,000 respondents altogether) using stratified multistage random sampling in the form of computer-assisted telephone interviewing (CATI). 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. All numbers shown in the report are in percentages. The report results were consulted with experts across CEE whose insights are included in the report within the text or as specific quotes.

Polling agencies

Slovakia: FOCUS s.r.o. (coordinator)
Bulgaria: ALPHA RESEARCH Ltd.
Czech Republic: STEM/MARK a.s.
Hungary: Publicus Kutató és Tanácsadó Intézet Kft
Latvia: Latvian Facts Ltd.
Lithuania: Vilmorus Ltd.
Poland: Opinia24 Sp. z o.o.
Romania: ISRA Center Marketing Research SRL

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- 4 <https://kyivindependent.com/defense-ministers-austria-hungary-agree-not-to-supply-weapons-to-ukraine>
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- 6 <https://cepa.org/article/polands-far-right-advances-on-anti-ukraine-sentiment/>
- 7 <https://www.bloomberg.com/news/articles/2023-02-02/eu-diplomats-warn-on-slovakia-s-opposition-as-election-nears#xj4y7vzkg?leadSource=verify%20wall>
- 8 <https://444.hu/2023/04/14/a-honvedseg-utan-most-a-katonai-hirszerzesnel-zajlanak-leepitesek>
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- 30 https://prazsky.denik.cz/zpravy_region/ceska-televize-dozorci-rada-nezavislost-verejnopravní-media-demonstrace-ct.html
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