

# GLOBSEC **Trends** **2024**

## **CEE: A Brave New Region?**

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# Executive summary

Since 2004, every five years has marked an opportunity for Transatlanticists and Unionists in Central and Eastern Europe (CEE) to celebrate the momentous accessions of their countries to the EU and NATO. The change of security environment triggered by Russia's full-scale invasion of Ukraine, however, has placed the 2024 commemorations against a starkly different backdrop, transforming membership in these two blocs into fundamental guarantees of safety and stability.

This year's GLOBSEC Trends report underscores that CEE societies broadly recognise the indispensability of the EU and NATO. CEE public opinion strongly favours the anchoring of their

respective countries - and Ukraine - in the transatlantic community. Societies are also demonstrably aware of who their allies are and the major threats they face amid a changing landscape. This sentiment has remained stable since 2022, which suggests its enduring potential in the years to come.

Since 2004, every five years has also marked an opportunity for the CEE region to partake in the EU-wide democratic exercise via European Parliament elections, widely regarded as a celebration of democracy. While this process offers electorates a chance to shape the future of the 450-million-strong bloc, it also opens opportunities for the exploitation of democratic vulnerabilities

through disinformation and manipulative narratives propagated in election campaigns by extremist or nationalistic populist voices. The GLOBSEC Trends findings indicate that such vulnerabilities exist in each CEE country, varying in nature and scope. Amid the insecurities stoked by wars in Europe and elsewhere, along with the AI technology revolution, it is imperative for pro-democracy stakeholders to address these vulnerabilities systematically and comprehensively before other foreign or domestic actors do so by undermining democratic values and Transatlantic unity.

**The 2024 edition of this report provides further insight into where these key vulnerabilities lie, and which counter-narratives could work (or not) in addressing them. While the key findings on the next page spotlight several core threads, we invite you to read the entire report to gain a more nuanced picture and explore crucial differences between the countries.**

# Key findings

## Unwavering backing of the EU and NATO

In most countries, overall support for EU and NATO membership has remained consistently robust since 2022, with 78% of respondents wanting to stay in the EU and 81% in NATO. Simultaneously, majority of CEE respondents recognise NATO's role as a security guarantee, and 62% acknowledge that the EU enables their country to have a bigger say in world affairs.

## Importance of defence recognised

While there is widespread public recognition of NATO's role as a security guarantee for the region, support for the EU in strengthening its own defence capabilities and limiting dependence on the US is also prevalent, marking an important shift in sentiment in favour of increased defence spending.

## Support for Ukraine stable or rising

Support for Ukraine's membership in the EU, NATO or both institutions grew in most countries, with the exception of Poland and Slovakia, a trend that directly contradicts the Kremlin's information influence efforts. A majority of 74% is also in favour of continued military support for Ukraine.

## Germany is back

The shift in Germany's policy towards Russia and Ukraine has been recognised in the region, with Berlin jumping back to being perceived as the most important strategic partner by 56% of CEE respondents.

## Fear of war present

The fear of war spillover is also influencing public opinion. While majorities in the region back the provision of military equipment to Ukraine, nearly half also believe that by providing military assistance, their countries are provoking Russia and bringing themselves closer to the war.

## Liberal democracy supported as a concept, less in practice

While support for tolerance and respect for human rights, regardless of sexual orientation or race, is broadly popular - with half of the CEE region embracing these views - openness towards accepting equal rights for LGBTI+ people is not shared by the majority in most countries.

## Democratic watchdogs valued

The escalating smear campaigns against NGOs and the media appear to be having the opposite effect on populations than intended. Far greater shares of respondents in the region recognise the vital importance of these institutions for democracy than buy into hateful narratives, with media trust rising since last year.

## Selective approach to migration

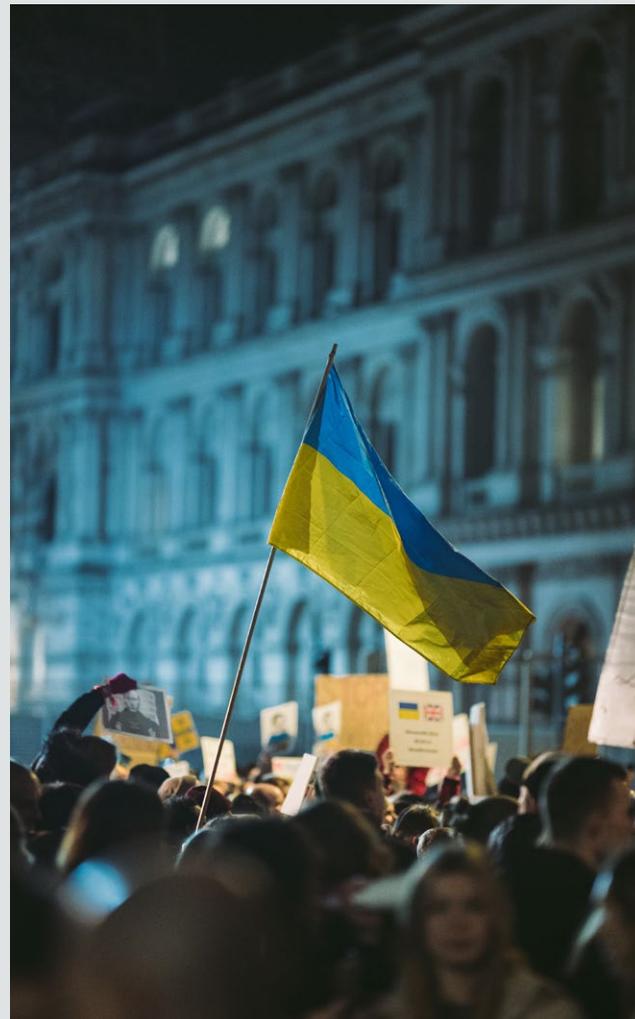
While migrants arriving from Ukraine are generally accepted across the region, those coming from outside Europe are seen as a potential threat to identity and/or values by majorities in most countries, apart from Latvia and Romania, demonstrating persistent xenophobia in the region.

# Recommendations

With multiple elections on the horizon amid increased efforts by foreign and domestic actors to undermine key transatlantic values, principles and institutions, the GLOBSEC Trends findings spotlight key focus areas for strategic communication and targeted campaigns in the region and beyond. These considerations range from enhancing the situational awareness of populations concerning Chinese malign influence to addressing the need for the organisation of systematic debates on the benefits of Ukraine's NATO and/or EU accessions and recognising the importance of migrants for CEE economies. The following recommendations, in this context, provide input for the public, private and civil sectors and those interested in enhancing regional resilience.

## 1 Impact stories about support

Ukraine is defending itself - its democracy, territory and people - against Russia. Vladimir Putin can quickly end the war by withdrawing Russian soldiers from Ukrainian territory and declaring a cease-fire. The fact that the West is helping Ukraine in its fight for freedom needs to be consistently emphasised, for example, through communication campaigns personalising Ukraine's fight and showcasing stories about the direct impact of humanitarian and military aid from CEE countries.



## 2 Ukraine brings economic and security benefits

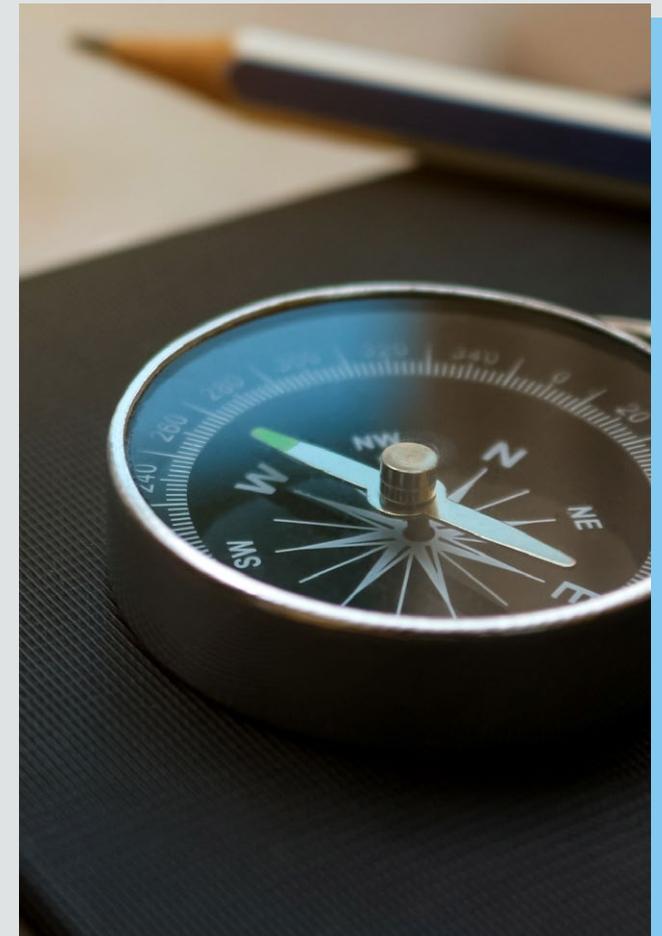
At a time when one crisis frequently replaces another, values-based communication does not always resonate with citizens. Communication on Ukraine's potential EU and NATO memberships should focus on the enormous economic and security benefits and development opportunities the accessions will bring to CEE countries and the entire transatlantic community, addressing the needs of various societal groups to optimise impact.

## 3 Our economies need migrants

With aging societies and an increasing brain drain to the West, many CEE economies require (qualified) workers in the form of economic migrants. Issues such as the polarisation of society, othering, and potential racial prejudices need to be addressed by communicating the economic benefits and added value of migration, showcasing success stories, and implementing inclusive policies.

## 4 Debates on who we are

Democracy is not merely a checklist of concepts but is premised on public participation and a willingness to find compromise. While easy fixes offered by populist leaders can be tempting in times of crisis, for democracies to grow stronger, public debates about basic principles, threats and internal problems are a must. To bolster resilience against polarising narratives, CEE countries should engage in discussions about what it means to be part of the West, the EU and NATO and the principles that their societies want to live by.



5

## Showcase contributions and achievements

The 75<sup>th</sup> anniversary of NATO's establishment, and the 25<sup>th</sup> and 20<sup>th</sup> anniversaries of CEE countries joining NATO, should be utilised to showcase the importance of the Alliance to citizens, including its accomplishments and the contributions of individual member countries to the collective defence and missions of the Alliance. Specific examples of how CEE countries contribute to NATO and stories about their value as equal partners should be at the centre of communication campaigns.



6

## Ready to lock and load

With limited prospects for the war in Ukraine to end soon and increasing insecurity in the world, CEE respondents recognise the need for developing their own defence capabilities, whether in the form of NATO or an EU army. National as well as EU and NATO stakeholders should utilise such positive perceptions to conduct necessary upgrades to capabilities and coordinate joint procurements.

7

## AI: insecurities and unknowns

47% of CEE respondents are pessimistic about the potential impact of AI on their lives and those of future generations. Negative perceptions and insecurities should be addressed through public debates tackling the impact of AI on all spheres of society, together with lifelong training and requalification programmes developed and offered to those directly impacted by the AI age.

8

## Support media, shape perceptions

Trust and independence of media matter in the CEE region. The more that people trust mainstream media outlets or perceive them as free, the more likely they are to believe that Russia invaded Ukraine and to support Ukraine's NATO and/or EU membership. Bolstering independent and investigative media outlets and expanding access to their content to wider audiences will build resilience to disinformation and improve geopolitical awareness.

9

## Talk about China's influence

While only one-third of CEE respondents perceive China to be a security threat, 53% agree that China is trying to weaken the EU and NATO, underlining the increasing awareness of Chinese activities in the region. CEE countries and international stakeholders need to continue building awareness and adopt policy measures against Chinese malign influence. While geographical distance might contribute to lower threat perceptions, information sharing about Beijing's activities in the region is crucial.

10

## Follow Germany

The increased presence of Germany, alongside its security commitments to its partners, has positively resonated in the CEE region. German decisiveness and interest in the region have paid off, with Berlin once again perceived as the most important strategic partner to CEE countries. While Germany needs to sustain such engagement in the region, other Western countries should follow its example. Joint cooperation at bilateral or multilateral levels, and an increased presence, builds trust both in the participating countries and within the EU and NATO.

11

## Make it "us" instead of "them"

The concept of liberal democracy resonates more with respondents when they feel they are part of it. Key elements of liberal democracy, such as the protection of human rights and adherence to the rule of law, should be communicated in a way that helps people understand how they are already contributing to it, and how improving adherence to these rules and values will benefit them. The approach of using an "us" framing should also be replicated in communications about other issues and groups, whether they be refugees, NGOs, or other targets of smear campaigns.

# Countries covered by this report



## Bulgaria

### Eurocepticism is present.

73% of respondents in Bulgaria agree that the EU dictates to their country what to do without Bulgaria having an opportunity to influence it, while 40% - the least in the region - believe that the EU allows their country a greater say in world affairs. These results stem from the prevailing view that Sofia has minimal influence on EU affairs.

### Pro-Kremlin attitudes remain firm, with some shifts.

Only 44% of respondents acknowledge that Russia is primarily responsible for the war, whereas 61% fear that weapon deliveries to Ukraine are provoking Russia. However, signs of moving away from Kremlin's influence are also evident: more respondents now believe that Ukraine should be a member of the EU, NATO, or both, rather than remaining a neutral country.

### The Western threat.

Nearly a third of Bulgarians perceive Western societies and their way of living as a threat, and a similar proportion views the US as a threat to their country's security. These perceptions are likely shaped by a lack of identification with values generally associated with the West in the public sphere. This is indicated by the fact that only 26% of respondents believe that LGBTI+ rights need to be guaranteed.

## Czechia

### A champion of liberal democracy and tolerance.

A substantial 93% of respondents recognise the importance of living in a liberal democracy, where individual rights and freedoms are protected, reflecting widespread support for democratic values. Additionally, 73% agree that the rights of the LGBTI+ people, such as the right to marriage, should be guaranteed, representing the highest level of support in the CEE region.

### Understanding the true danger.

72% of respondents acknowledge far-right nationalism as a threat. This awareness is attributed to a relatively stable political landscape that recognises the dangers posed by far-right ideologies, further supported by vigorous legal actions against far-right nationalists guilty of inciting hate and violence towards certain societal groups.

### EU dictate narratives still resonate.

The proportion of respondents who agree that the EU dictates what their country should do without Czechia having the power to influence it has increased from 33% in 2020 to 57% in 2024. This shift reflects Czechia's historical inclination towards Eurocepticism, further fuelled by populist parties.

## Estonia

### Standing behind Ukraine.

66% of respondents believe that Russia is primarily responsible for the war in Ukraine, and 60% see Ukraine's future as lying within the EU, NATO, or both. Despite regular threats from Russia towards the Baltic states and vocal warnings from Estonian intelligence agencies about the Kremlin's intentions, the country remains steadfast in its support for Ukraine.

### Increased awareness of China.

Between 2022 and 2024, the proportion of respondents perceiving China as a threat increased by 10 percentage points, from 24% to 34%. This rise is primarily due to the recognition of China's assistance to Russia during the war against Ukraine.

### Strong belief in democracy.

83% of Estonian respondents affirm that they live in a liberal democracy that protects individual rights and freedoms, and they believe it should remain that way. After becoming the first post-Soviet country to legalise marriage for same-sex couples, 52% of Estonian respondents support guaranteeing the rights of the LGBTI+ community. This data underscores the strong commitment to democratic values among the country's population.

## Hungary

### European paradox.

The public remains strongly committed to the country's EU membership, as evidenced by 86% of respondents supporting it. At the same time, Hungarians are the least likely to believe in the anti-EU narrative that the Union dictates their country's policies without any possibility of Hungarian influence, with only 39% agreeing with this view. This is likely influenced by the government's vocal veto threats against certain EU measures, providing a "first-hand experience" for Hungarians that counters the narrative.

### Waiting for the Eastern miracle.

34% of respondents now view China as one of the country's key strategic partners, following a steady increase over three consecutive years. This growing perception can be attributed to the Hungarian government's positive rhetoric towards China and the growing Chinese investment in the Hungarian economy, which have been increasingly recognised by the population.

### Dissatisfied with democracy.

Satisfaction among Hungarians with how their democracy works is at 36%, substantially lower than in 2020, or 2022. Similarly, trust in the government has fallen from 48% in 2020 to 39% in 2024.

## Latvia

### Security concerns prevail.

While in 2023, 29% of respondents believed that providing military equipment to Ukraine would provoke Russia, by 2024, this proportion increased to 41%. This indicates that the Kremlin's regular threats against NATO and particularly targeting the Baltic states, have had some impact in Latvia.

### Some EU-critical narratives resonate.

The proportion of respondents who agree with the "EU-dictate" narrative increased from 56% in 2023 to 65% in 2024, while fewer people see the EU as providing an opportunity to increase Latvia's influence in world affairs compared to the previous year. This shift highlights that campaigns run by local actors against the Union, particularly concerning claims that the Green Deal harms farmers, have been somewhat successful.

### Backing democracy but not LGBTI+ rights.

Respondents in Latvia have expressed strong support for liberal democracy, with 80% affirming their desire to continue living in a system that values human rights and tolerance. However, even after the Latvian Parliament recognised same-sex civil unions in November 2023, less than half of the respondents support LGBTI+ rights.

## Lithuania

### Steadfast EU support.

Respondents in Lithuania demonstrate the most robust support for EU membership among CEE countries, with 87% displaying enthusiasm levels akin to those seen pre-accession. Additionally, Lithuania records the lowest regional endorsement of claims that the EU threatens national values and identity. Despite this strong affiliation, 59% of Lithuanians still subscribe to the narrative of so-called EU dictate.

### Clear on security threats.

In addition to 82% of respondents recognising Russia as a security threat, half also view China as a security concern, which makes Lithuania and Czechia the only CEE countries where the majority acknowledges these risks. The heightened awareness is attributed to long-term resilience-building efforts within the country, including transparent government communication concerning Russian and Chinese malign influence.

### Indecision on NGOs.

23% of respondents were uncertain about the importance of NGOs in supporting a democratic society - the highest figure in the region. This uncertainty indicates a general lack of understanding about the functioning of NGOs, as well as their contributions to democratic systems, leaving the society vulnerable to NGO-related disinformation.

## Poland

### Strongest supporters of NATO.

Poland's support for NATO, standing at 94%, underscores the country's robust commitment to the Alliance and collective defence. Such high level of support reflects Poland's strategic positioning and historical experiences, highlighting the critical importance of NATO for the nation's security against potential aggressions.

### Embrace of democratic values.

Respondents in Poland feel the least threatened by Western societies from the region. Simultaneously, 55% support the rights of LGBTI+ people and 83% concur that respect and tolerance towards each other, regardless of sexual orientation or skin colour, is important for their society.

### Ukraine's backing slightly decreased.

Support for Ukraine's membership in both the EU and NATO has slightly declined in the country, while endorsement for Ukraine to remain a neutral state has risen from 15% to 24% over two years. Despite these shifts, likely influenced by protests related to the import of Ukrainian grain, Poland continues to be one of the strongest proponents of Ukraine's NATO membership in the region.

## Romania

### Some are turning against Ukraine.

The proportion of respondents who identify Russia as responsible for the war decreased from 65% in 2023 to 55% in 2024, while 22% blamed Ukraine in 2024. This shift is likely the result of the proliferation of disinformation aimed at challenging pro-West narratives and portraying Ukraine in a negative light, especially concerning the country's alleged treatment of minorities.

### Allied presence is recognised.

Although fewer respondents view the US as one of their country's main strategic partners, the recognition of Germany, France, and the UK as strategic partners has increased. A common factor among these Western European countries is increased military cooperation with Romania.

### Tempted by the far-right.

38% of respondents perceive far-right nationalism as a threat, fewer than most of Romania's CEE neighbours. This is largely due to the lack of public education on the issue and the prevalence of narratives that portray the West treating Romanians as second-class citizens, potentially provoking a longing for stronger nationalist response. 36% of Romanians also agreed that a totalitarian system without elections could benefit their country.

## Slovakia

### EU and NATO support back to 2022 levels

Since 2023, support for both EU and NATO membership has increased by approximately 10 percentage points among respondents, now standing at 72% and 69%, respectively. This rise follows a steep decline in support detected in 2023, likely due to the widespread anti-West disinformation during the campaign prior to the parliamentary elections held in autumn 2023. Despite the recent recovery to levels similar to those of 2022, support remains among the lowest in the CEE region.

### Misunderstanding the role of NGOs.

Only 52% of respondents believe that the work of NGOs is important for the functioning of a democratic society. Conversely, 38% of respondents subscribe to the narrative that NGOs are foreign agents, a narrative frequently employed by the political representatives to portray NGOs as enemies of the state.

### In media we trust?

50% of respondents in Slovakia trust mainstream media and 73% consider their media to be relatively or completely free - the highest figures in the region. This may be influenced by the increasing legitimisation of disinformation channels by key government figures, which might have contributed to a belief among consumers of disinformation outlets that their media is "finally" free.



78%

of CEE  
respondents  
support EU  
membership  
of their country

01

# The European Union: Support remains strong

In 2024, most CEE countries are celebrating 20 years of their accession to the EU. The so-called “Big-Bang” enlargement and its accession process streamlined numerous reforms in CEE countries. While the pre-accession enthusiasm declined over the years of many crises, the support for EU membership has remained high throughout the CEE region, confirming the EU’s importance for regional cooperation, prosperity, and security. The EU’s recovery and structural funds serve as an important source for financing reforms and structural development

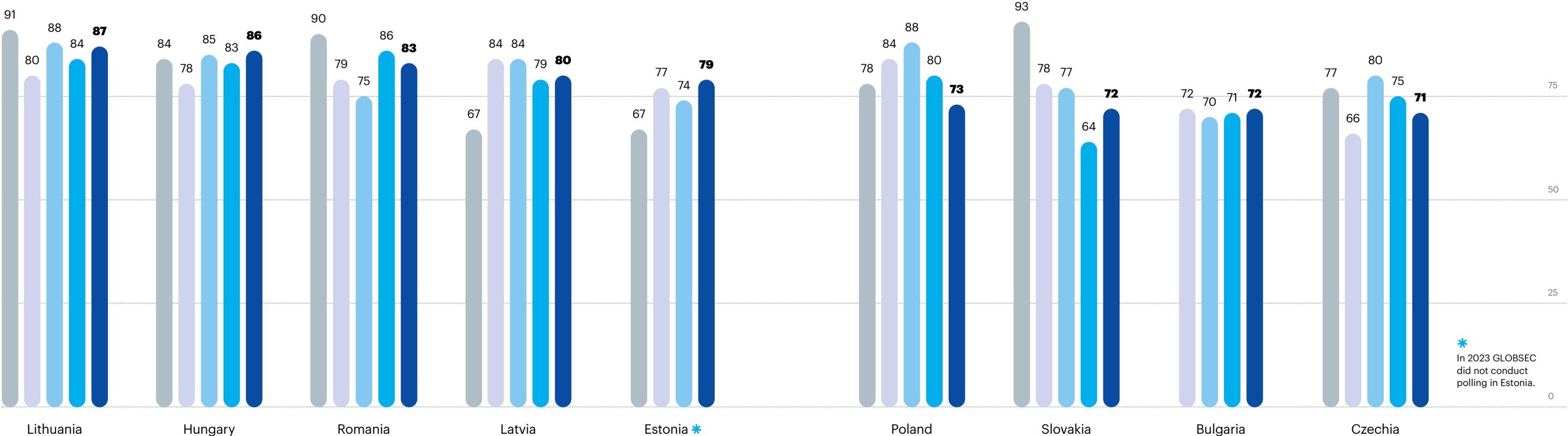
in CEE countries. In addition, the majority in CEE realise that thanks to EU’s membership their country has a bigger say in the world’s affairs. One of the key reasons for that might be the decisive stance taken primarily by the CEE countries driving the EU’s support to Ukraine after the full-scale invasion.

# Support for EU membership

\* Results of public referendums conducted prior to the countries' accession in 2003.

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 in the EU ● 2003\* ● 2021 ● 2022 ● 2023 ● 2024



In all 9 countries analysed, the majority of respondents would support their country's membership in the EU if a referendum were to be held on this issue. Overall, support for EU membership remains high and stable, showing no significant shifts over the past year. Poland and Slovakia represent exceptions with changes of 7-8 percentage points.

**16%**  
of CEE respondents would vote to leave the EU.

"In Poland, the decline in support for EU membership is directly linked to concerns about the EU's Green Deal policies. The Polish populace is particularly worried about rising energy costs, given the country's energy infrastructure's heavy reliance on coal."

**Pawel Terpilowski,**  
Demagog Poland

"The call for reaffirmation of belonging to the Union and the importance of adhering to its democratic principles was loudly echoed in public protests after Slovakia's newly elected government began to implement policies undermining the rule of law. While ruling party representatives do not dispute Slovakia's membership in the EU, the rise in support for the membership may be interpreted as hope that Brussels will play a bigger role in safeguarding democracy within the country."

**Katarína Klingová,**  
GLOBSEC

# Dichotomy: appreciated but still attacked



In all countries except Bulgaria, the majority of respondents believe that their country has a greater influence in global affairs thanks to the EU. This perception has notably increased in Romania, Slovakia and Hungary over the past year. In the latter, this “bigger say” could be seen in the context of increasing obstruction of the EU’s unified policies towards Russia, including sanctions and support for Ukraine<sup>2</sup>. Successful efforts by single member states to alter EU policies may serve as evidence of their country’s capacity to influence the EU and, consequently, global matters. In Hungary, only 39% agree with the narrative that the EU dictates policy, making the country a regional exception.

Amid the overwhelming acknowledgment of the EU’s value in amplifying the voices of its member states, 60% of CEE respondents also subscribe to the so-called “EU dictate” narrative. This negative perception is fuelled by a general misunderstanding of EU policies, the division of competencies between Brussels

and member states, and the rise of populist attacks that often scapegoat the EU for their own failures. Since 2020, the average percentage of respondents believing in the EU dictate narrative has risen from 53% to 60%, with the most significant increases observed in Czechia, Romania, Bulgaria, and Poland.

“The dichotomy of Latvian perceptions towards the EU stems from smear campaigns run by disinformation actors and domestic populist and conservative political figures, especially leading up to European Parliament elections. Narratives that decry the EU’s Green Deal and claim the EU forces decisions harmful to farmers are particularly prevalent and spread widely on social media.”

**Linda Curika,**  
University of Latvia

“Czechia’s Euroscepticism persists particularly under the influence of populist parties, including the ANO movement led by former Prime Minister Andrej Babiš, which continues to employ Eurosceptic and national-conservative messaging. Such rhetoric has consistently skewed public discussion around EU policies to be predominantly negative, with EU energy and green policies being prime examples. The government under Petr Fiala marked a shift towards proactive EU policymaking, however, even Fiala’s Civic Democratic Party (ODS), the major government party, harbours a strongly Eurosceptic wing.”

**Kristína Šefčíková,**  
Prague Security Studies Institute

“Bulgarians’ views of the EU are shaped by lingering Western-sceptical attitudes, which predispose the population to believe that the West “imposes” policies on Bulgaria and “suppresses its national sovereignty”. Furthermore, Sofia’s traditionally passive foreign policy hinders the recognition of the significant opportunities and platforms the EU provides for member states to ‘upload’ their policy preferences at the Union level.”

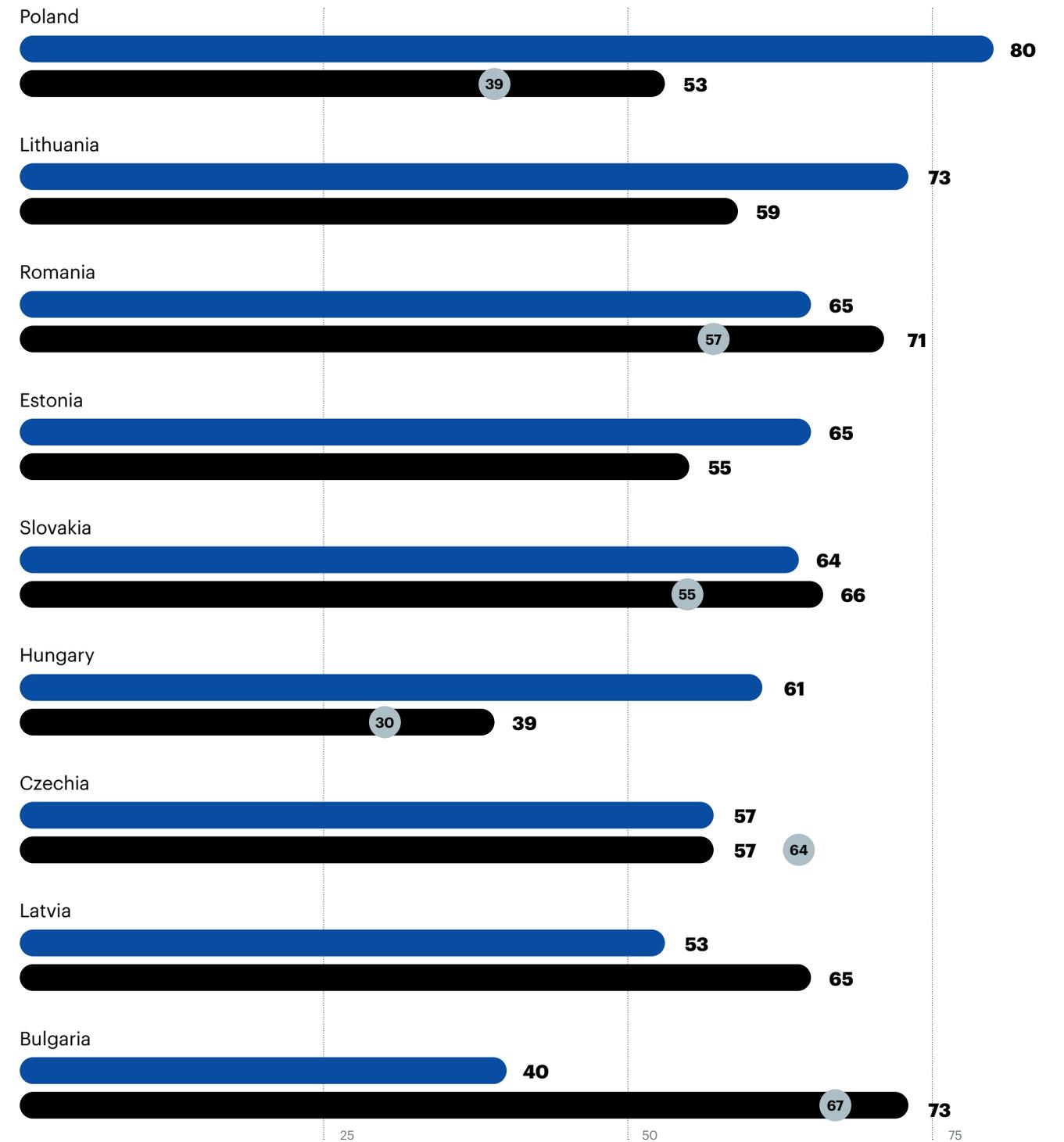
**Rumena Filipova,**  
Institute for Global Analytics

## Those who agree with following statements: (%)

Only changes over 5% were visualised.

Thanks to EU membership, my country has a bigger say in the world’s affairs. ● 2024 ● 2020

The European Union dictates to us what to do without our country having power to influence it. ● 2024 ● 2020



# Negative perceptions

The generally positive perception of the EU is further highlighted by a finding that shows 73% of Central Europeans not believing the EU poses a threat to their values and identity. This perception of threat correlates with the willingness to leave the EU, except in Romania and Hungary, where the gap between perceiving the EU as a threat and the actual willingness to exit the Union is halved. This discrepancy may stem from the rhetoric employed by certain factions within the political landscape of both countries.



## Threatened, but reluctant to leave (%)

- Those who agree that the EU threatens their own values and identity.
- Those who would vote their country to leave the EU.



# Who wants the EU army?

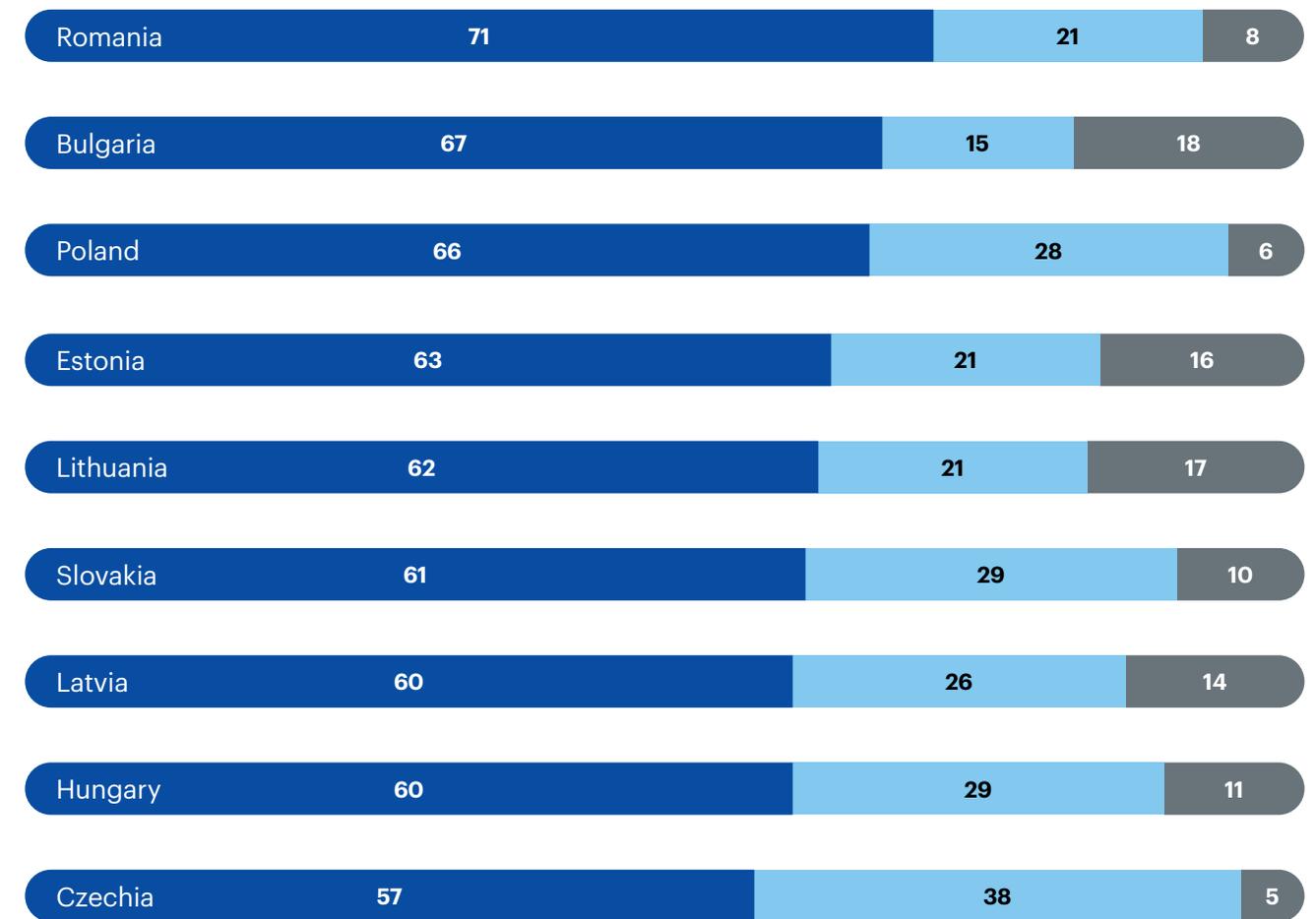
The full-scale invasion of Ukraine and Russia's malign influence both within and outside the EU, alongside the upcoming presidential elections in the United States - which could impact security in Europe - have sparked discussions about the need to enhance the EU's defence capabilities. Such a notion has been voiced by several EU leaders, including the French President Emmanuel Macron in 2018<sup>3</sup> and Italian Foreign Minister Antonio Tajani in January 2024<sup>4</sup>.

majority of respondents in all countries support this idea, in Bulgaria, Estonia, and Lithuania, nearly one-fifth of respondents held tentative thoughts on the matter. With security increasingly representing a centrepiece of high-level discussions, CEE respondents' recognition of the importance of developing and investing in defence capabilities is a positive sign.

As a result, 63% of CEE respondents agree that the EU should start building its own army to reduce dependence on the United States. Although the

## EU should start building its own army to limit dependence on the United States. (%)

- Agree
- Disagree
- Do not know (not read)



02

# NATO: Strong support of the Alliance

81%

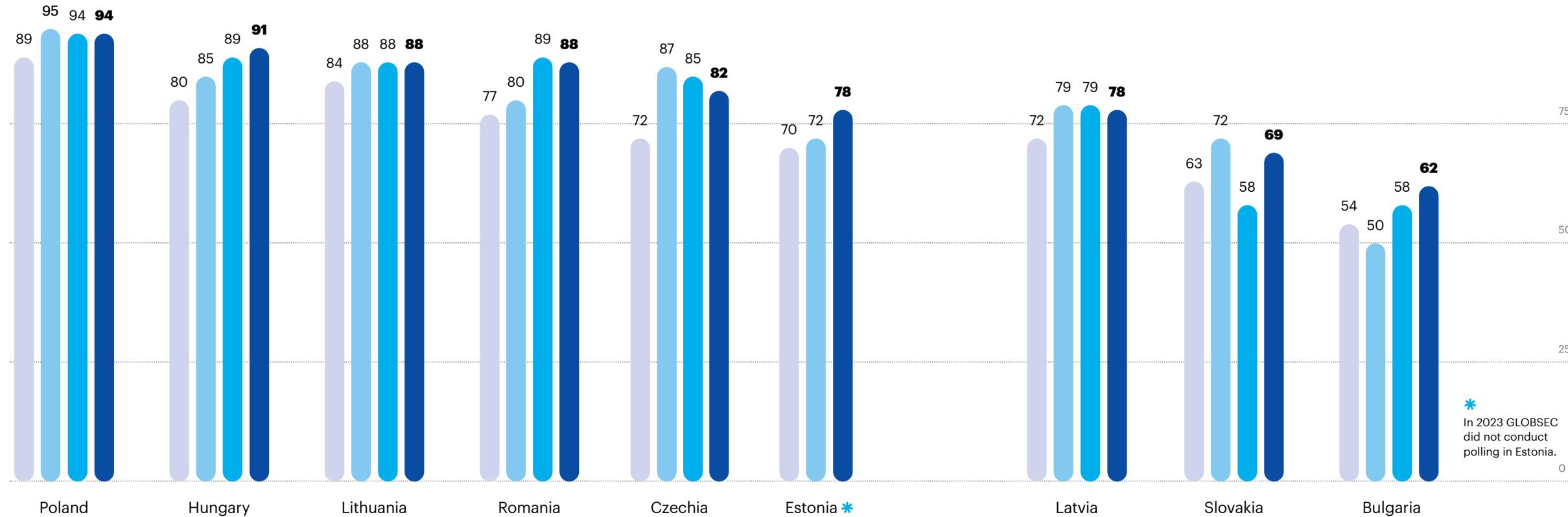
of CEE respondents support their country's membership in NATO.

Russia's full-scale invasion of Ukraine made NATO stronger than ever before. This was evidenced with Sweden and Finland, Nordic nations historically priding themselves on their neutrality, joining the Alliance. NATO now comprises 32 member states and enjoys robust support in the CEE region, where 81% of respondents endorse their country's membership in the Alliance. With the escalation of the war in Ukraine, the average regional support for NATO membership surged from 73% in 2021 to 81% by 2024.

# Majority in favour

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. (%)

Stay in NATO    2021    2022    2023    2024



The ongoing war and the worsening global security landscape have bolstered support for NATO membership even in Slovakia and Bulgaria, countries historically and culturally closer to the Kremlin<sup>5</sup>. Slovak support for NATO membership has increased by 11 percentage points compared to 2023, reaching 69%, nearly returning to the peak levels of 2022, which marked the culmination of steadily increasing support since 2018.

Nevertheless, 27% of Bulgarians and 24% of Slovaks still express a desire for their countries to leave NATO, with an additional 11% and 7% respectively harbouring tentative views on the matter. This indicates that both countries are susceptible to manipulation. However, the CEE celebration of 20-25 years in NATO, alongside the Alliance’s 75<sup>th</sup> anniversary, presents numerous opportunities to highlight the significance of NATO to its citizens.

“Widespread disinformation campaigns conducted by both domestic and foreign entities, targeting issues such as the Defence Cooperation Agreement between Slovakia and the US or the purported planned mobilisation and deployment of Slovak soldiers in Ukraine, contributed to the negative perception of the Alliance in 2022. However, effective strategic communication from public institutions, strategic investments in new capabilities, and faith in collective defence — bolstered by Finland and Sweden’s accession to NATO — have contributed to shifts in Slovaks’ perceptions back towards a more positive view of the Alliance.”

**Katarína Klingová,**  
GLOBSEC

**13%**  
of CEE respondents would vote to leave NATO in case of a referendum.

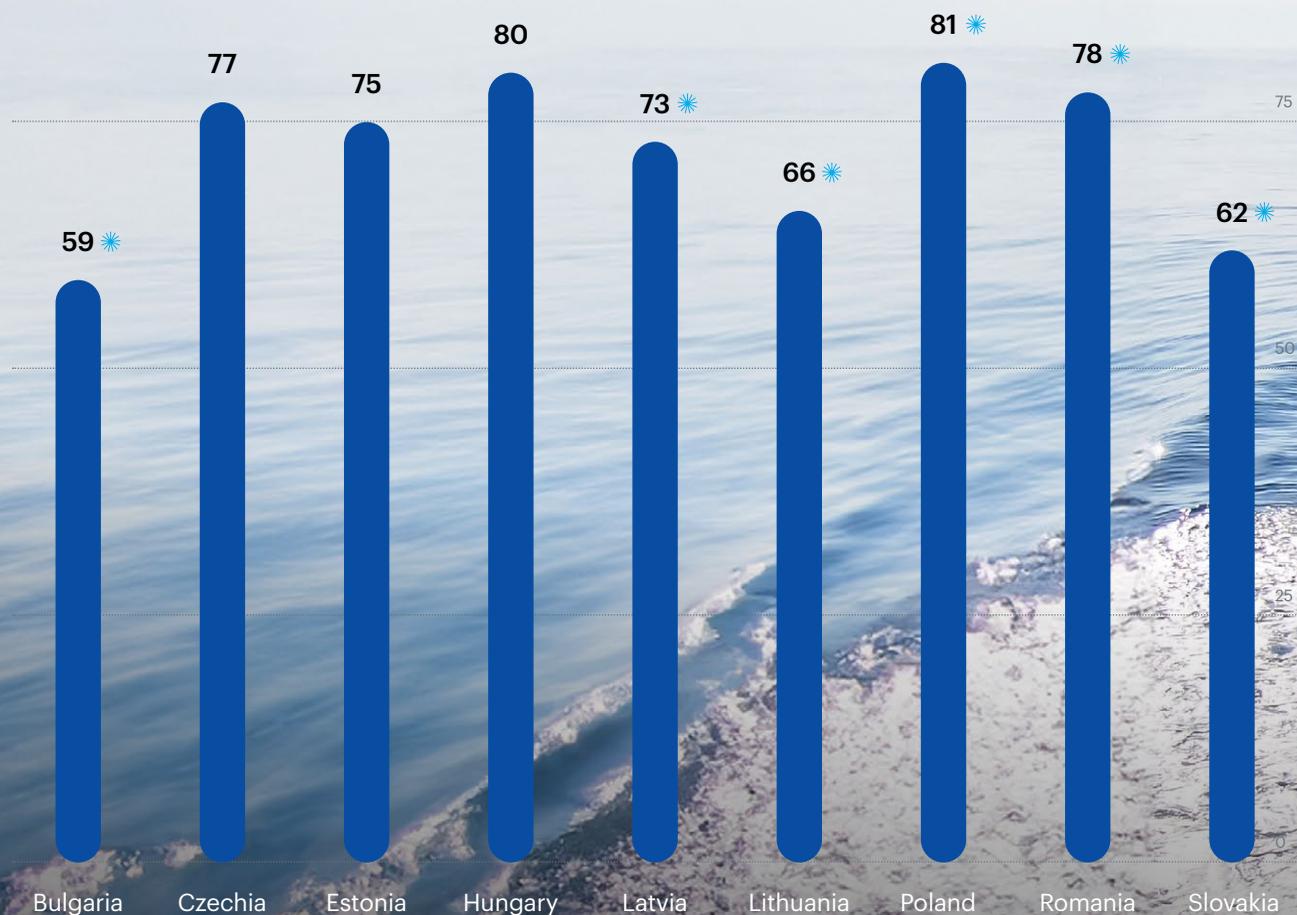
“Increase of support for NATO membership in Bulgaria has been driven by a growing realisation that the country cannot effectively respond to a high-risk security environment independently. However, specific NATO initiatives, especially those involving an increased presence of Alliance forces on Bulgarian soil, have encountered significant resistance, largely due to pro-Kremlin proxies who incite fear by claiming that Bulgaria would be inevitably drawn into a conflict with Russia.”

**Rumena Filipova,**  
Institute for Global Analytics

# NATO's deterrence

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

● Agree



While 81% of CEE respondents support NATO membership, this backing has not yet fully translated into an equivalent level of confidence in the membership's ability to effectively deter foreign aggressors. On average, 72% of CEE respondents agree that their country's membership in NATO reduces the likelihood of an attack by a foreign nation. Nonetheless, the ongoing war in Ukraine has begun to erode the belief in NATO's deterrence capacity in Lithuania and Latvia. In these two Baltic

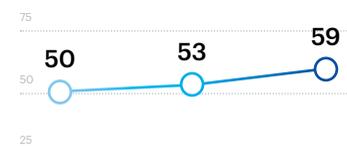
countries, confidence in NATO declined by 5 and 9 percentage points respectively over the past year. Conversely, in Bulgaria, Romania, and Slovakia, belief in the Alliance's deterrence has risen and almost aligned with the level of support for NATO membership.



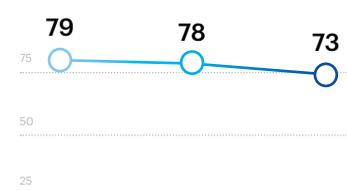
## Country focus: Changes over the years (%)

● 2022 ● 2023 ● 2024

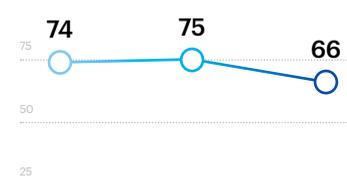
### Bulgaria



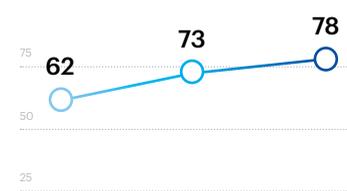
### Latvia



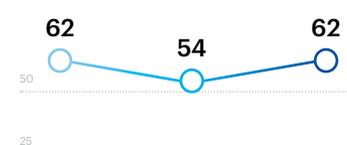
### Lithuania



### Romania



### Slovakia



# 72%

of CEE respondents believe in NATO's collective defence.

"In the news, the predominant topics are discussions about Ukraine, the war and debates over whether Latvia will be next. This is reflected in the assessments of the readiness of our army, the preparedness of NATO forces, as well as the conditions to trigger Article 5. These topics are highly resonating among citizens."

**Linda Curika,**  
University of Latvia

"It is evident that the Russian Federation is shifting towards a war economy, enacting military reforms, etc., which implies that mere NATO membership is not sufficient to deter Russia. This is more about Russia's capabilities and aggressiveness than about trust in NATO."

**Ieva Gajauskaitė,**  
Military Academy of Lithuania

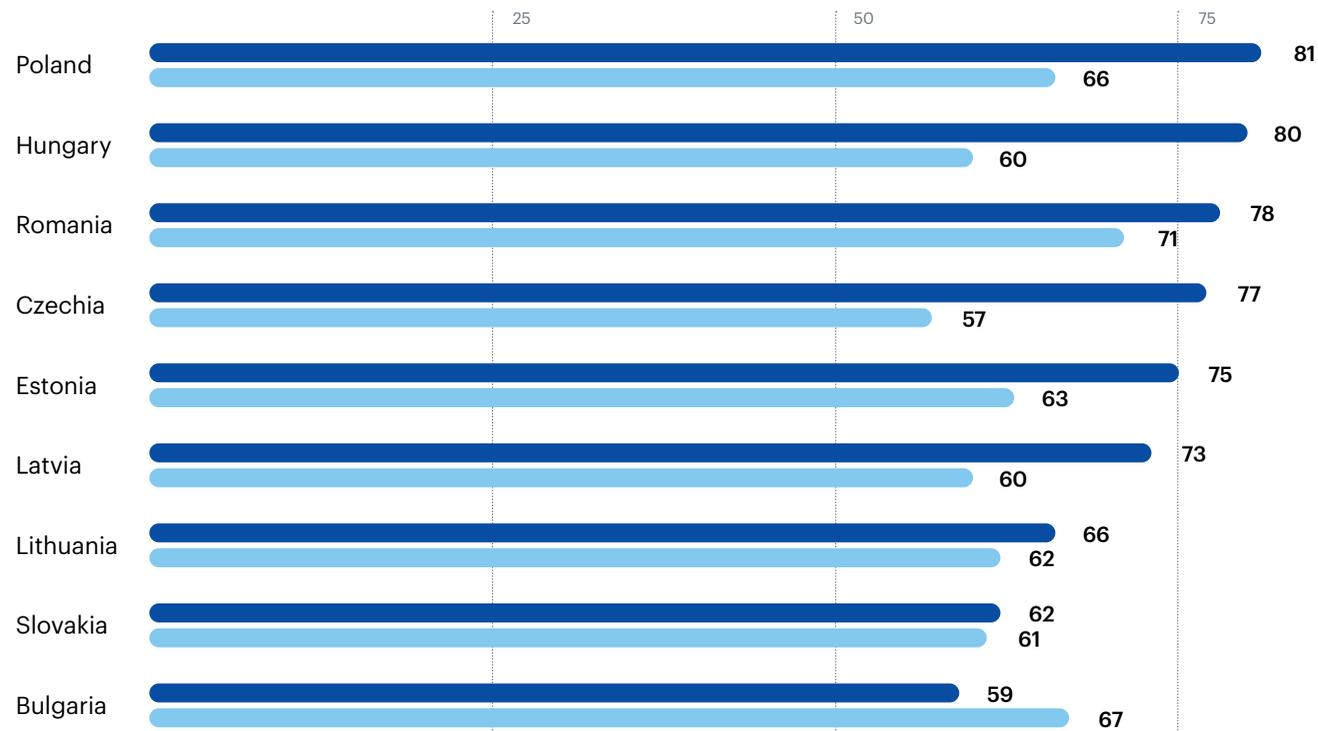
# In NATO and army we trust

On average, 72% of respondents across CEE countries have faith in NATO's collective defence and its deterrence concept, while 63% believe that

the EU should begin to establish its own military force to reduce dependence on the United States. The preference for NATO cooperation over the development of EU capabilities is more pronounced in 6 out of 9 countries surveyed, with the highest disparity in Czechia and Hungary. A notable exception is Bulgaria, where 67% of respondents favour the development of an EU army over the 59% who trust NATO's deterrence.

## Those who agree with the following statements: (%)

- My country's membership in NATO makes it less likely that a foreign nation will attack us.
- EU should start building its own army to limit dependence on the United States.



## Those who completely and rather trust armed forces in their country. (%)



## The most trusted institutions in CEE region. (%)



The overarching trend suggests that CEE countries recognise the importance of building their own resilience and supporting the development of their capabilities, whether through the EU or NATO framework.

The belief in NATO as a security guarantee also correlates with growing confidence in the armed forces of CEE countries. The armed forces, owing to their apolitical nature and heightened significance amid the war in Ukraine, have maintained their status as the most trusted public institution in the region — on average, 69% of CEE respondents trust them.

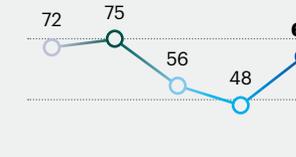
## Country focus: Trust in armed forces over the years. (%)

- 2020
- 2021
- 2022
- 2023
- 2024

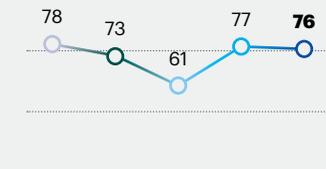
### Bulgaria



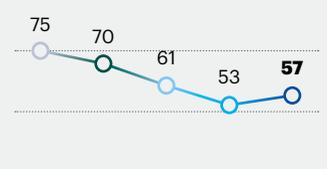
### Slovakia



### Romania



### Hungary



Bulgaria stands as a notable exception in the region regarding trust in the armed forces. A systematic distrust in its own public institutions may also explain why respondents, rather than having confidence in their own military, are the second strongest proponents for the EU to develop its own army.

Slovakia witnessed a significant increase in trust towards its armed forces, with a rise of 20 percentage points within one year. Following the initial shock of Ukraine's invasion and subsequent disinformation campaigns that questioned the capability of Slovak soldiers to defend their country<sup>6</sup>, trust levels are gradually returning to those seen before the invasion.

Romania has observed a similar trend to Slovakia, with trust in the armed forces significantly declining following the invasion of Ukraine in 2022 but slowly rebounding to pre-invasion levels. This suggests that Romanians were also questioning their army's capabilities in the invasion's imminent aftermath in a country which shares a 600-kilometer border with Ukraine.

Hungary's decline in trust in 2023 could be caused by the Ministry of Defence's decision to terminate the employment of soldiers who had reached the age of 45 and had at least 25 years of service<sup>7</sup>, causing the departure of some of the most senior and experienced members of the armed forces.

## 03

# 56%

of CEE respondents perceive Germany as one of the most important strategic partners for their country, a return to the pre-war stance.

## A partner or a threat?

The full-scale invasion of Ukraine has significantly altered attitudes towards major geopolitical players, both within Europe and globally, reinstating security as a paramount factor in determining allies or adversaries. These shifts in perspective remain evident with Russia broadly regarded as a threat by the majority in the region, and the United States seen as a crucial ally. Two years into the war, some changes in perceptions occurred, largely mirroring the actions and rhetoric of the given states. This is particularly true for Germany, which has notably increased its commitments and assertive support for

Ukraine, ranking just behind the United States in terms of military assistance<sup>8</sup>. The past year has also seen a growing awareness of China, evidenced by a slight uptick in the country's recognition as both a strategic partner and a security concern, with Lithuania and Czechia leading in acknowledging the threats emanating from Beijing.

In contrast, in some countries, a notable concern is present regarding the threat perceived from Western societies and their values, fuelled by disinformation campaigns chiefly propagated by Russia and adopted by domestic actors.

# Strategic partnerships

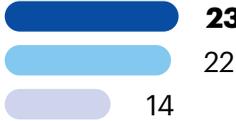
Which of the following global actors do you consider to be most important strategic partners for your country?  
Pick max. 2. (%)

Regional average ● 2024 ● 2022 ● 2021

## United States



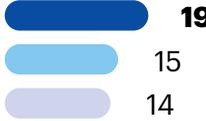
## United Kingdom



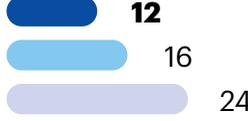
## Germany



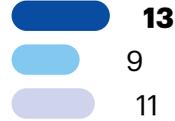
## France



## Russia



## China



12%

In the CEE region view Russia as a strategic partner, a steady decline since 2021.

# Germany



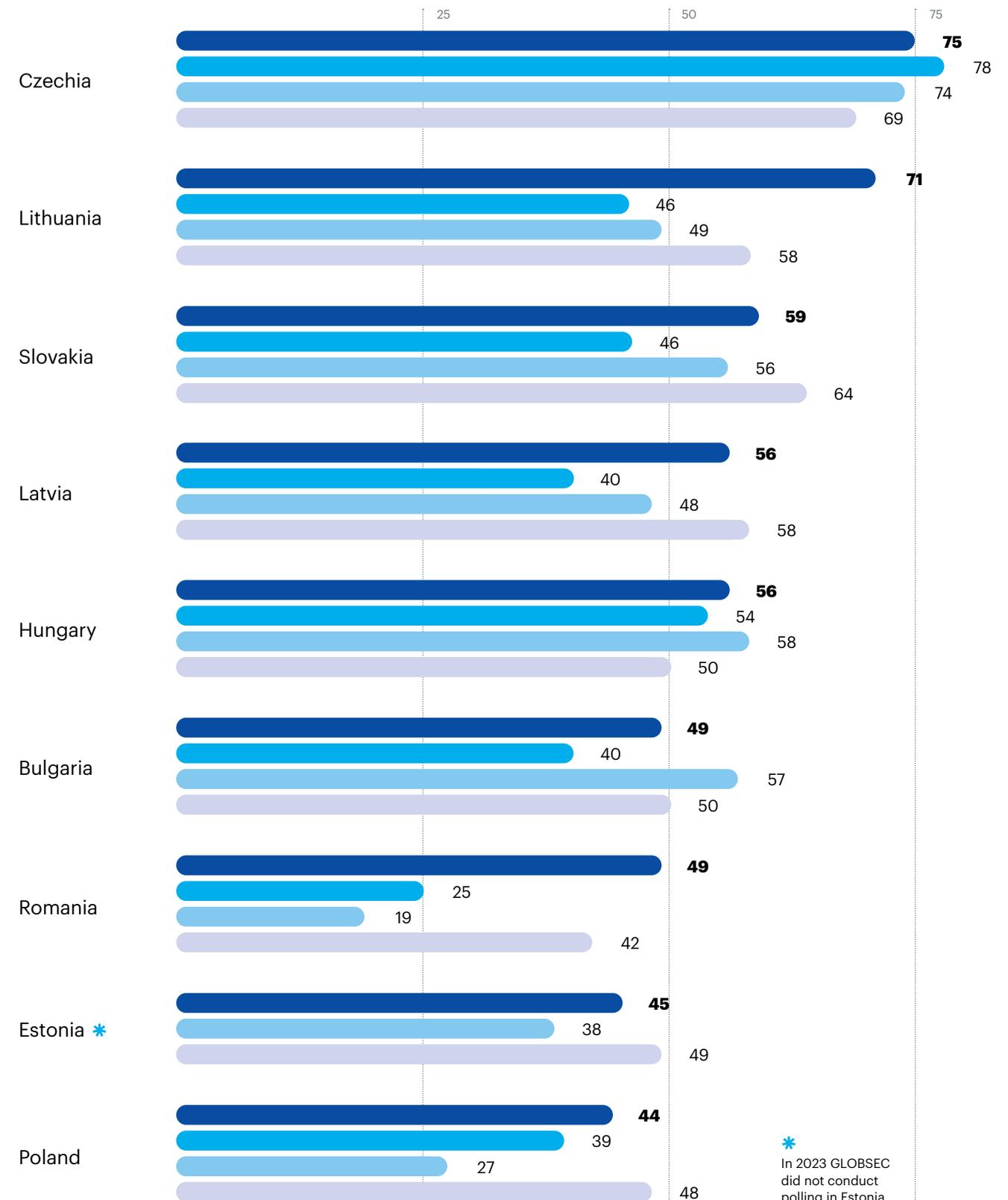
After two years of reduced emphasis on Germany, recent data suggests Germany's comeback, reasserting its status as the most important strategic partner for the CEE region in 7 out of 9 countries. This resurgence may be attributed to Germany's policy shift regarding Ukraine in May 2023<sup>9</sup> and its enhanced commitment to regional security<sup>10</sup>, alongside more decisive rhetoric. For instance, Germany's decision to bolster NATO's eastern flank by deploying 4,000 troops might have influenced perceptions in Lithuania<sup>11</sup>, while the stationing of Eurofighter jets to safeguard Romanian airspace<sup>12</sup> likely contributed to a marked improvement in Romania's view. Consequently, Germany is now recognised not merely as a partner associated with economic cooperation but also as a key guarantor of regional security, in parallel with the United States.

"The increasingly perceived importance of Germany as Lithuania's most vital strategic partner can be attributed to Germany's decision to deploy additional military units and upgrade NATO's Enhanced Forward Presence rotational forces to brigade level in Lithuania by 2027. Although Germany had already stationed its rotational forces there in 2017, the agreement reached at the NATO Summit in Madrid likely reinforced Germany's position as one of Lithuania's most significant strategic allies."

 **Balys Liubinavičius,**  
Debunk.org

## Those who selected Germany as a one of two key strategic partners. (%)

● 2024 ● 2023 ● 2022 ● 2021



\* In 2023 GLOBSEC did not conduct polling in Estonia.

# The United States



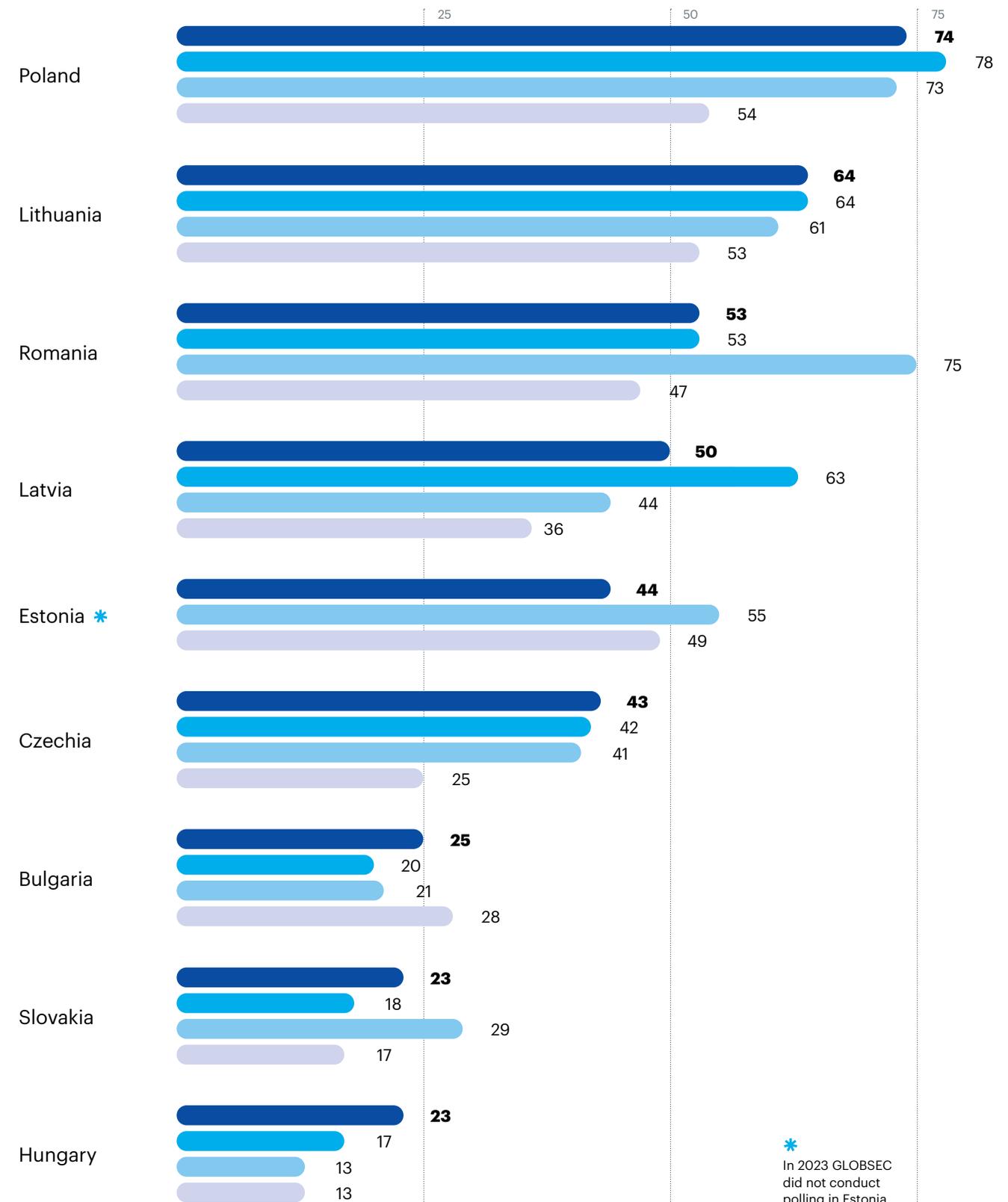
The United States is viewed as a strategic partner by 44% of CEE respondents. This perception has remained stable in the region over the past two years, with the US being considered the most important strategic ally in Poland and Romania. The only significant increase during this period was observed in Hungary, where positive perceptions of the US rose by 10% compared to 2021. Conversely, following a surge in 2023, the view of the US as a strategic partner in Latvia fell by 13 percentage points.

# 44%

of CEE respondents perceive the US as the most important strategic partner for their country.

## Those who selected the US as one of the two key strategic partners. (%)

● 2024 ● 2023 ● 2022 ● 2021



\* In 2023 GLOBSEC did not conduct polling in Estonia.

# United Kingdom



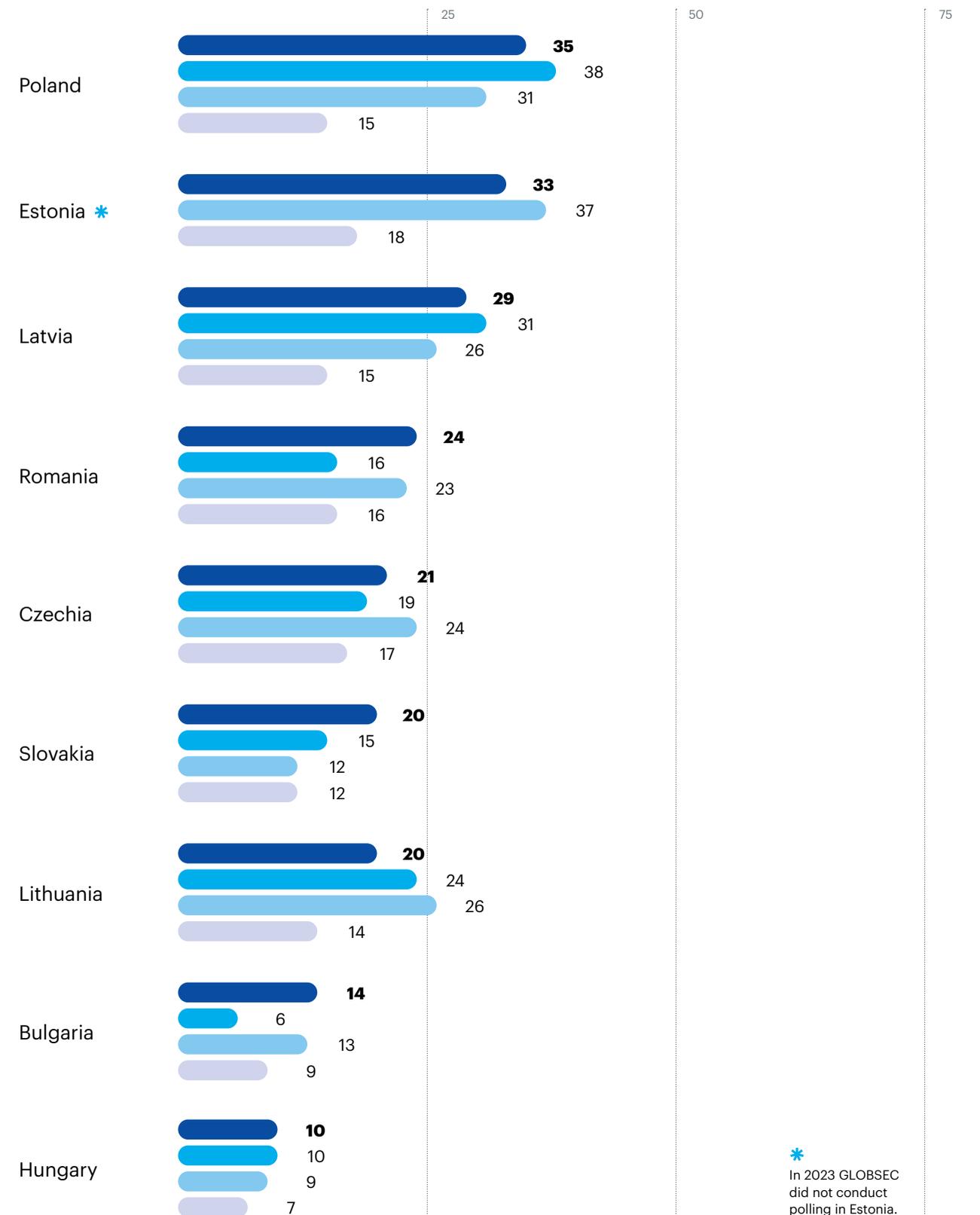
The UK is viewed as a key strategic partner by approximately one-third of respondents in Estonia, Latvia, and Poland. In Bulgaria and Romania, after a decline in 2023, recognition of the UK has returned to 2022 levels, a rebound that may be attributed to the UK's bolstered presence in the region. Specifically, in January 2024, the UK announced an increase in military support to Romania, enhancing the security defences in the Black Sea region<sup>13</sup>. Additionally, in October 2023, the UK and Bulgaria signed a declaration on a new UK-Bulgaria Strategic Partnership aimed at "expanding defence and security ties, tackling Russian disinformation, and addressing organised immigration crime"<sup>14</sup>.

"The number of respondents viewing the UK as Bulgaria's main strategic partner has more than doubled over the past year. This surge may be due to increased British efforts to sanction local political and business figures entangled in Russian corruption networks. Despite this, the preference for strategic partnerships with London remains the second lowest in the CEE."

**Rumena Filipova,**  
Institute for Global Analytics

## Those who selected the UK as one of the two key strategic partners. (%)

● 2024 ● 2023 ● 2022 ● 2021



\* In 2023 GLOBSEC did not conduct polling in Estonia.



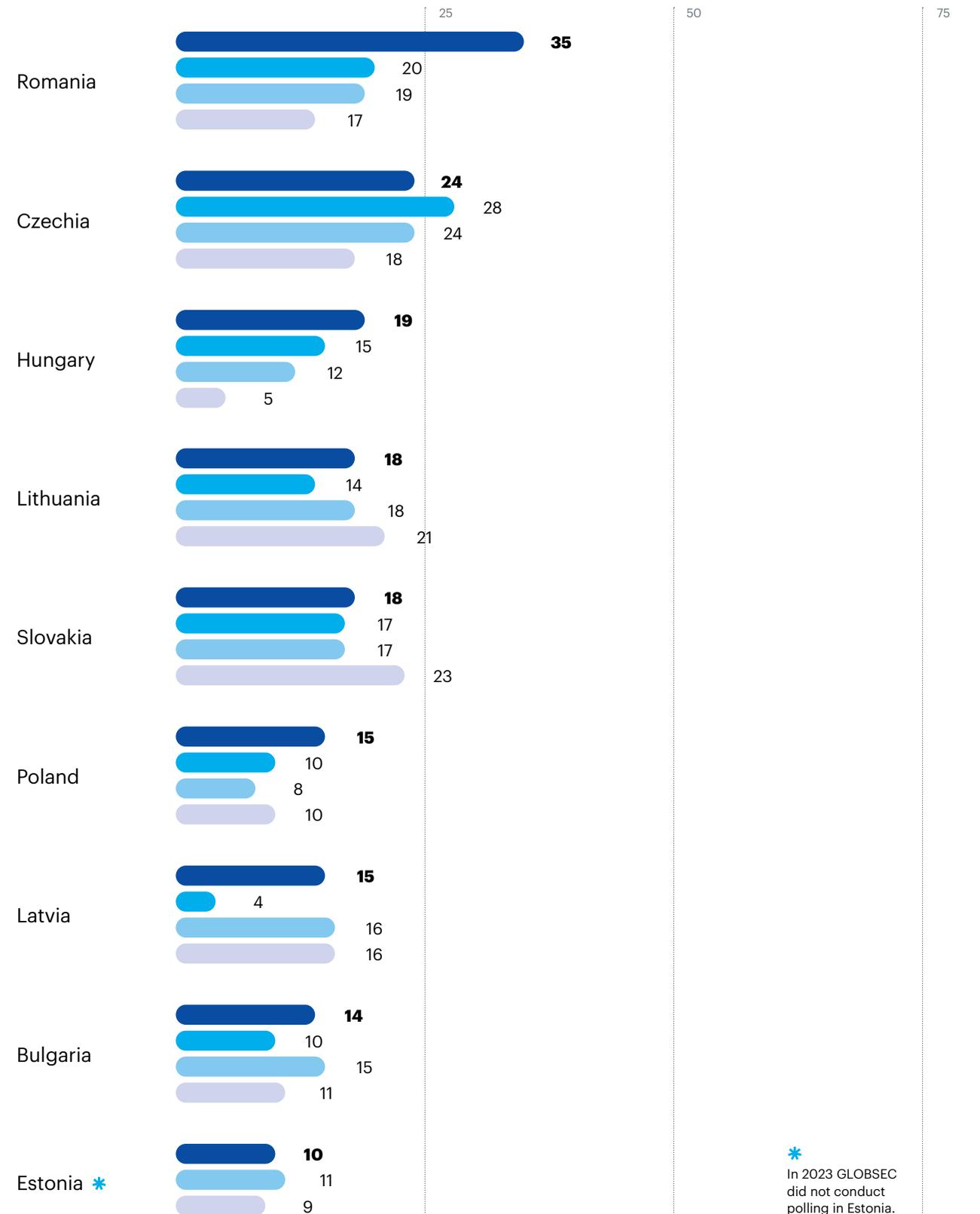
# France

Only 20% of CEE respondents view France as the most significant strategic partner for their countries. France is seen as a key strategic partner by more than one-third of Romanians, marking an 18% increase from 2021, alongside smaller rises in Latvia and Poland. This upswing mirrors France's intensified engagement in these countries. For example, in Romania, France announced an enhanced military presence<sup>15</sup>. In Latvia, the new Strategic Partnership Action Plan was signed in December 2023<sup>16</sup>.

**35%**  
of Romanians now view France as one of the most important strategic partners.

## Those who selected France as one of the two key strategic partners. (%)

● 2024 ● 2023 ● 2022 ● 2021



\* In 2023 GLOBSEC did not conduct polling in Estonia.



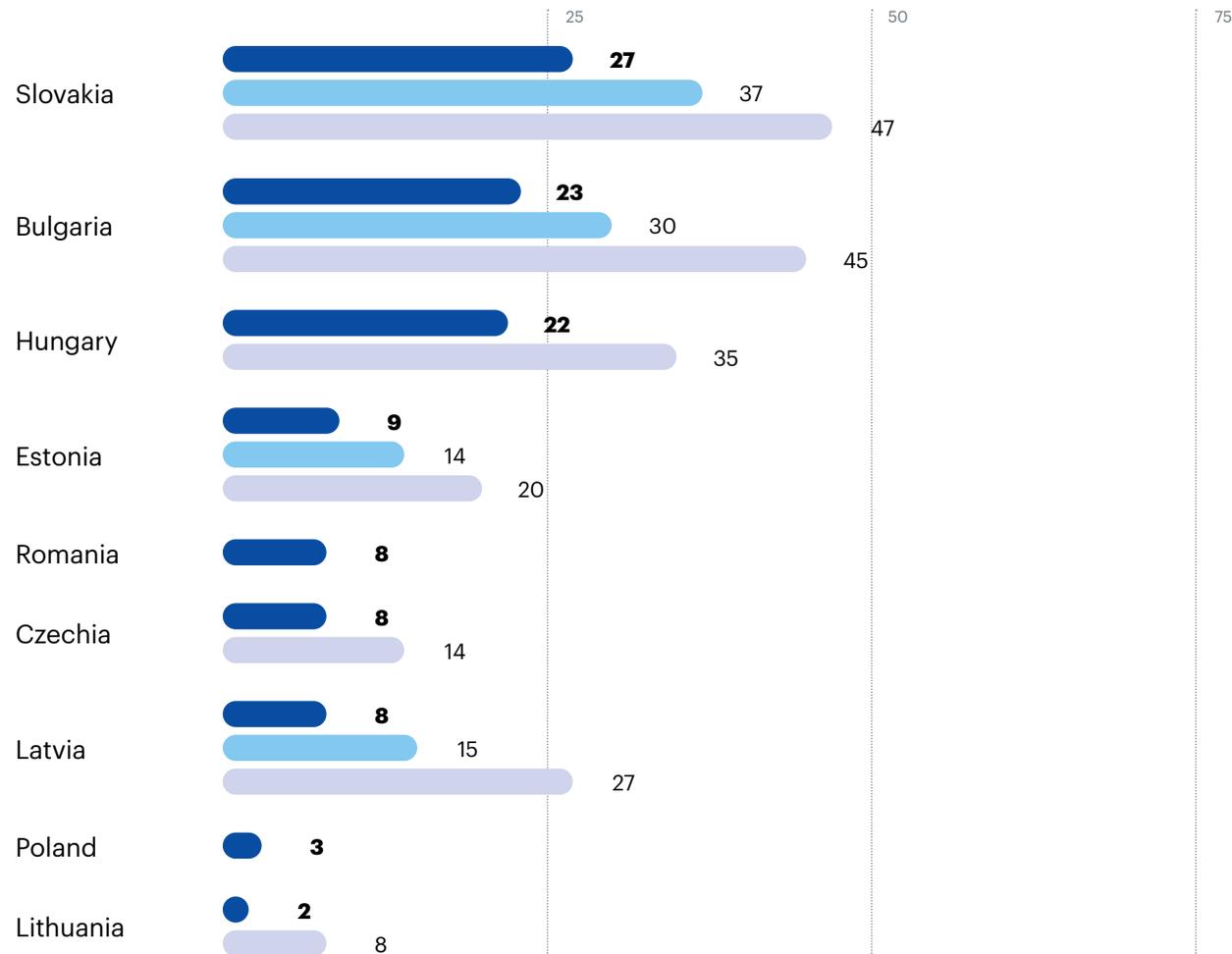
# Russia

Despite the ongoing conflict, Russia is still regarded as a strategic partner by nearly a quarter of respondents in Bulgaria, Hungary and Slovakia. The third round of data collection following the Russian invasion of Ukraine reveals that there exists a pro-Kremlin support base of at least 20% in these countries. If the initial shock of the invasion and the subsequent atrocities did not alter this stance, it is improbable that it will diminish further, owing to strong cultural connections, years of sustained influence operations<sup>17</sup>, and political rhetoric

that portrays Russia as a key strategic ally<sup>18</sup>. The last point is particularly relevant for some respondents, whose preferences of Russia or China may represent mere pragmatic reflections on their government's efforts to sustain relations with these regimes.

## Those who selected Russia as one of the two key strategic partners. (%)

● 2024 ● 2022 ● 2021



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



# China

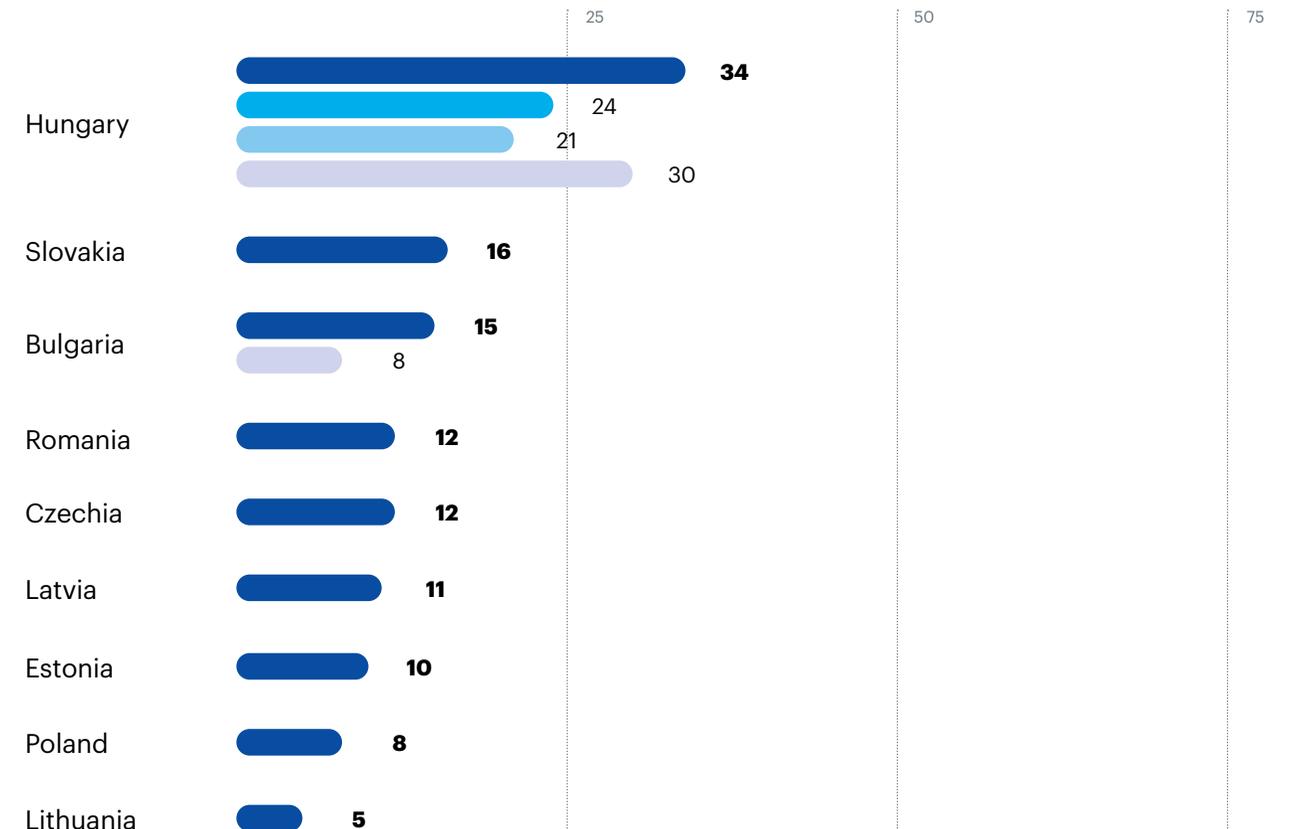
“The perception of China as one of the two most significant strategic partners of Hungary aligns with the Hungarian government’s long-standing narrative that China is a crucial ally, capable of bringing prosperity to Hungary and creating job opportunities. There are several Chinese investments that could be interpreted as the realisation of the ruling party’s narratives regarding China.”

Patrick Szicherle, GLOBSEC

While Russia’s perceived influence is diminishing, even among the traditionally more pro-Kremlin countries in CEE, China’s image as a strategic partner in the region is gradually rising, especially in Hungary, which stands out in the region. Although the number of respondents who see China as a strategic partner is not on par with that for the US, Germany, or even Russia, there is a slow but steady increase in positive perceptions that aligns with the Chinese approach of prioritising long-term strategic objectives and goals.

## Those who selected China as one of the two key strategic partners. (%)

● 2024 ● 2023 ● 2022 ● 2021



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

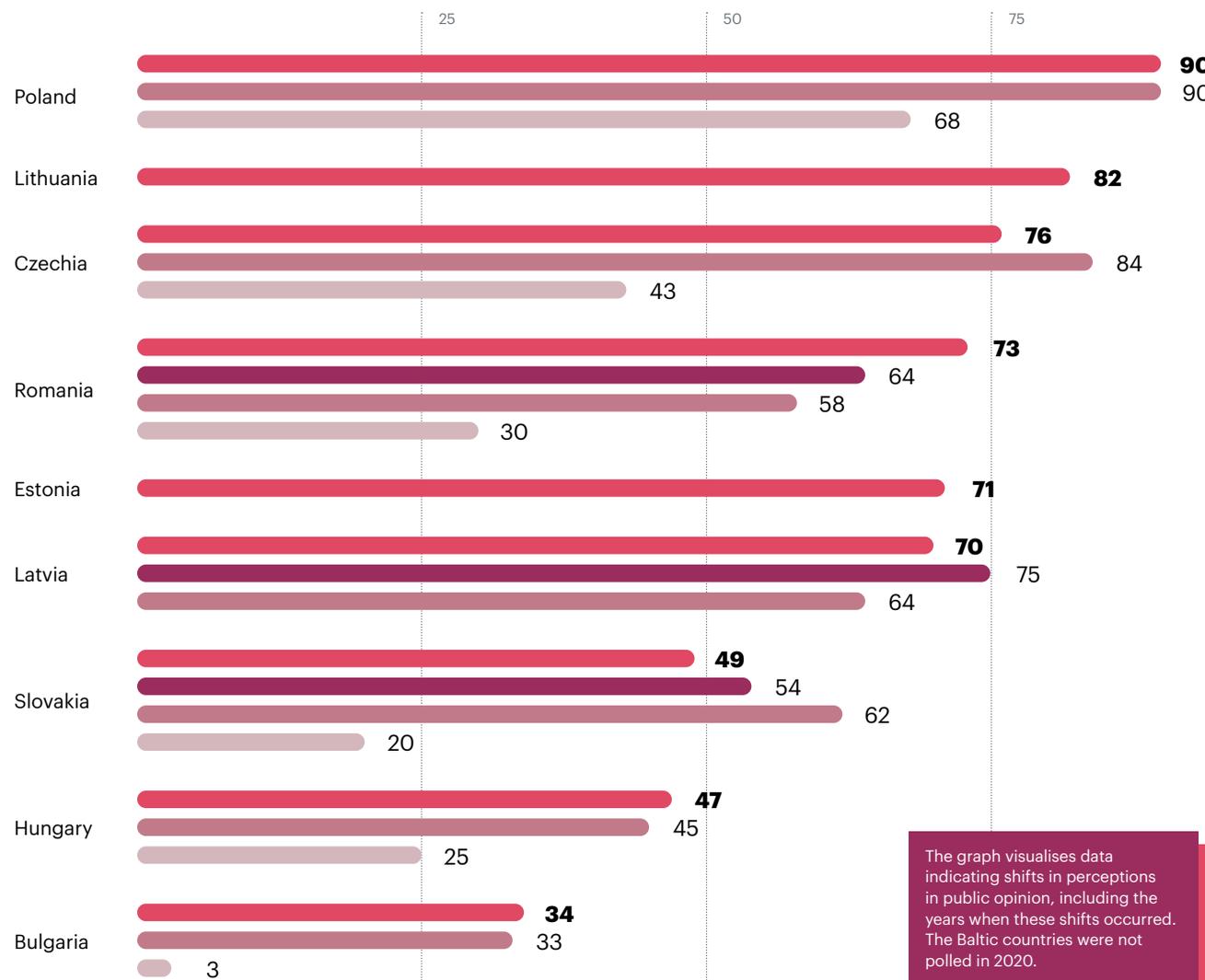
# Threat perceptions



Russia still a threat

## Those who consider Russia to be a security threat to their country (%)

● 2024 ● 2023 ● 2022 ● 2020



The graph visualises data indicating shifts in perceptions in public opinion, including the years when these shifts occurred. The Baltic countries were not polled in 2020.

In 6 out of 9 countries surveyed, a majority of respondents, accounting for 66% across the CEE region, view Russia as a security threat, albeit with notable variations throughout the region. While the perception of Russia as a security threat has stayed relatively constant in most countries since the full-scale invasion, Romania has seen a steady increase since 2022, with Czechia and Slovakia experiencing a declining trend in the same timeframe. Nonetheless, Czechia remains among the countries most concerned about security threats from Russia, whereas respondents in Slovakia remain less vigilant.

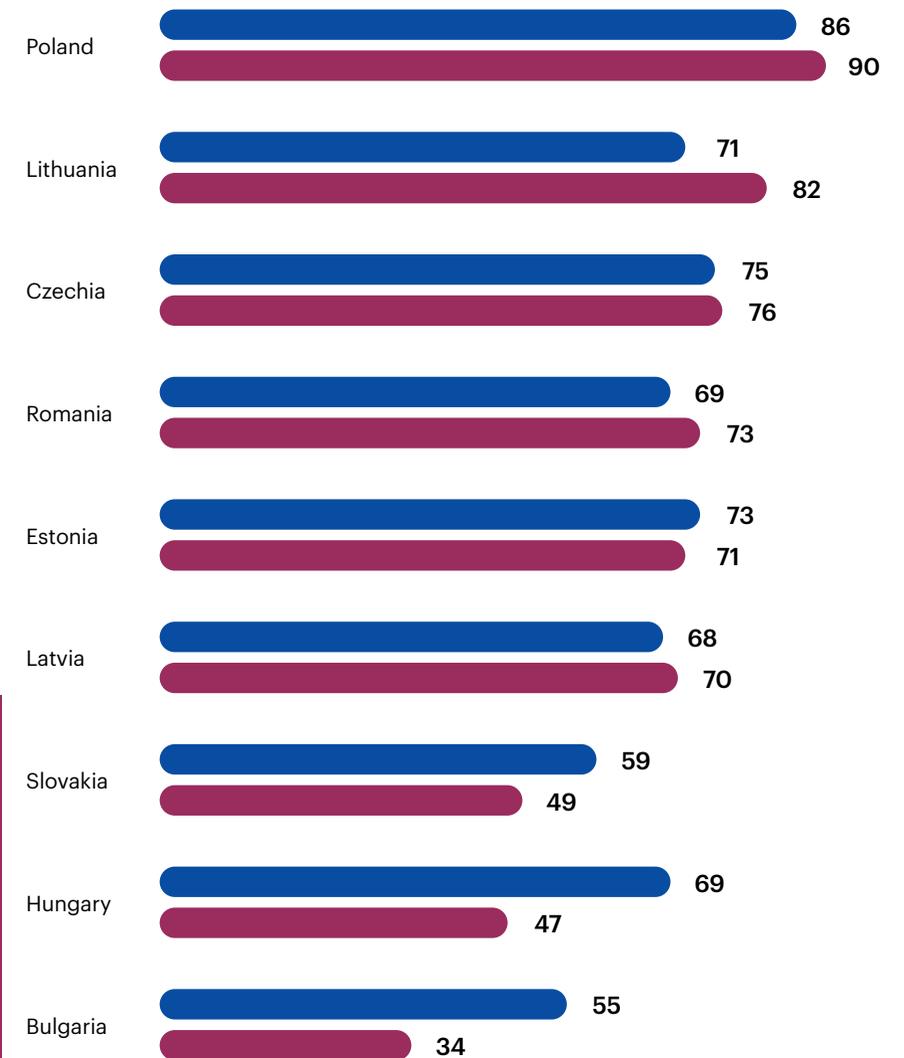
Focusing on the long-term shifts, perceptions of Russia as a threat were significantly lower before 2022 in countries where the polling was conducted, which reflects changes in security guarantees and threat perceptions following the full-scale invasion of Ukraine. The fact that the data has remained rather stable, and distinctly different from the pre-2022 period, indicates a solidification of these changed attitudes, which are expected to persist.

**69%**  
of CEE respondents agree that Russia is attempting to weaken the EU and NATO.

In Bulgaria, Hungary, and Slovakia, the perception of Russia as a security threat is notably lower than in other countries of the CEE region. However, when considering the perception of the Kremlin's malign influence in the region, a heightened awareness of Russia's activities has been observed. On average, 69% of CEE respondents agree that Russia is attempting to weaken the EU and NATO, with absolute majorities in Bulgaria, Hungary and Slovakia also concurring with this statement.

## Those who agree with the following: (%)

- Russia is trying to weaken the EU and NATO
- Russia is a security threat to my country

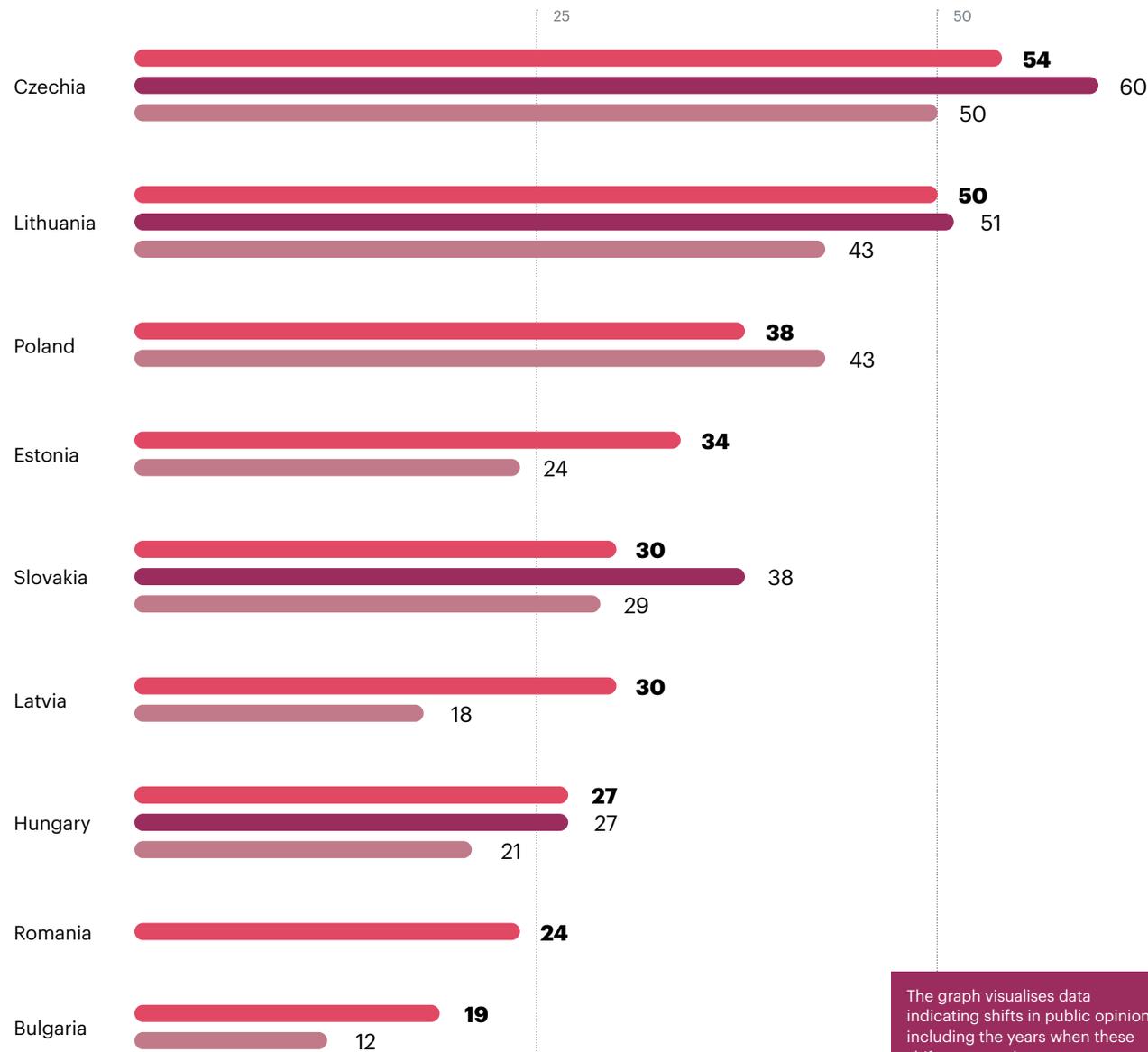




# Awareness of China rising

## Those who consider China to be a security threat to their country (%)

● 2024 ● 2023 ● 2022



The graph visualises data indicating shifts in public opinion, including the years when these shifts occurred.

Overall, with the exception of Poland and Slovakia, there has been an observed increase in the perception of China as a threat over the years. This trend can be partially attributed to the strengthening of China-Russia relations following the invasion of Ukraine<sup>19</sup> and an increased presence of China in public discourse<sup>20</sup>. Notably, only in Czechia and Lithuania - regional leaders in the recognition of Chinese influence - does a majority of the population recognise a China as a security threat.

Nonetheless, China is considered a security threat by only 34% of the region, a figure significantly lower than that for Russia, suggesting a need for greater awareness-raising. In Poland, Czechia, and Slovakia, the perception of China as a security threat has decreased this year, following a spike in 2023 in the latter two, likely due to increased attention on relations with Taiwan at that time<sup>21</sup>.

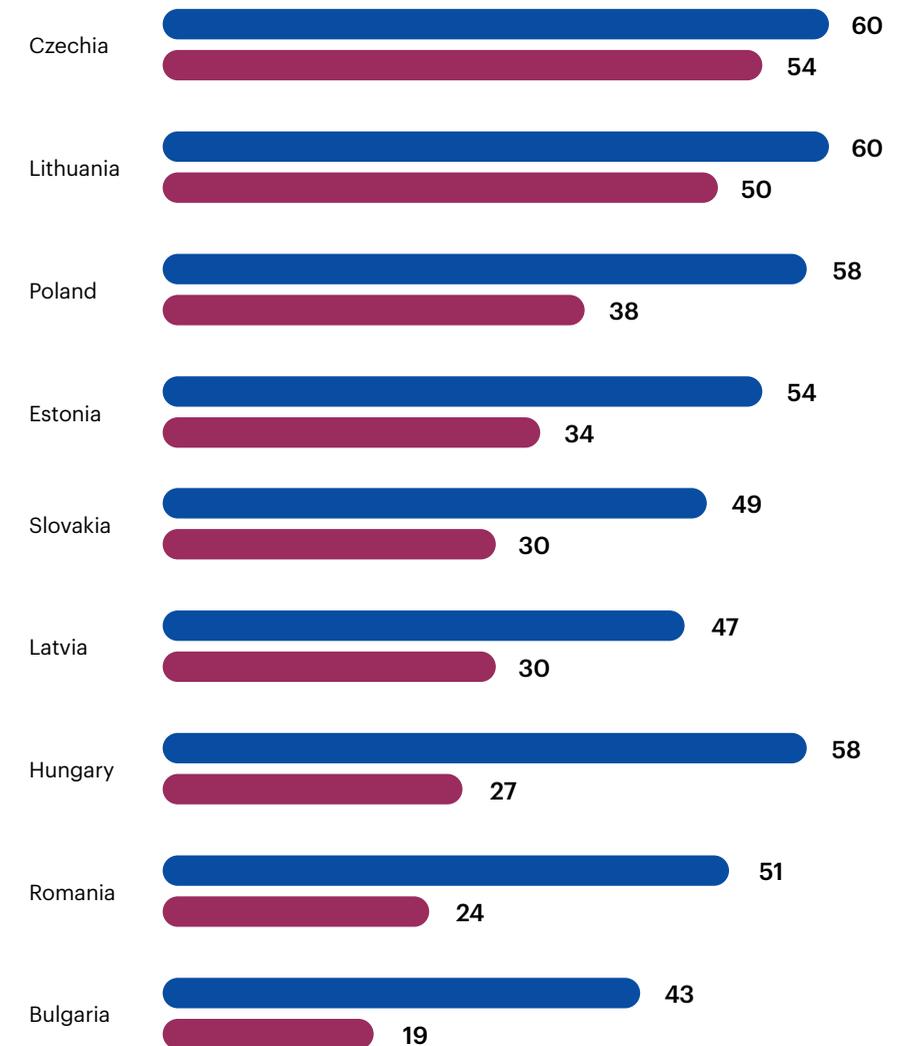
However, when respondents are specifically asked if China is attempting to weaken the EU and NATO, an increase in awareness occurs. This suggests higher sensitivity to China's influence operations in a broader region, but a lack of knowledge or understanding of the activities undertaken in the respondents' respective countries.

"In Estonia, over the past two years, the perception that China is assisting Russia in its war on Ukraine, effectively "allying" with Russia, has significantly strengthened. Additionally, security services have become more vocal about China's activities. While they do not equate the threat with that posed by Russia, the increased discussion has impacted individuals who had been previously undecided."

**Merili Arjakas,**  
International Centre for Defence and Security

## Those who agree with the following: (%)

● China is trying to weaken the EU and NATO  
● China is a security threat to my country

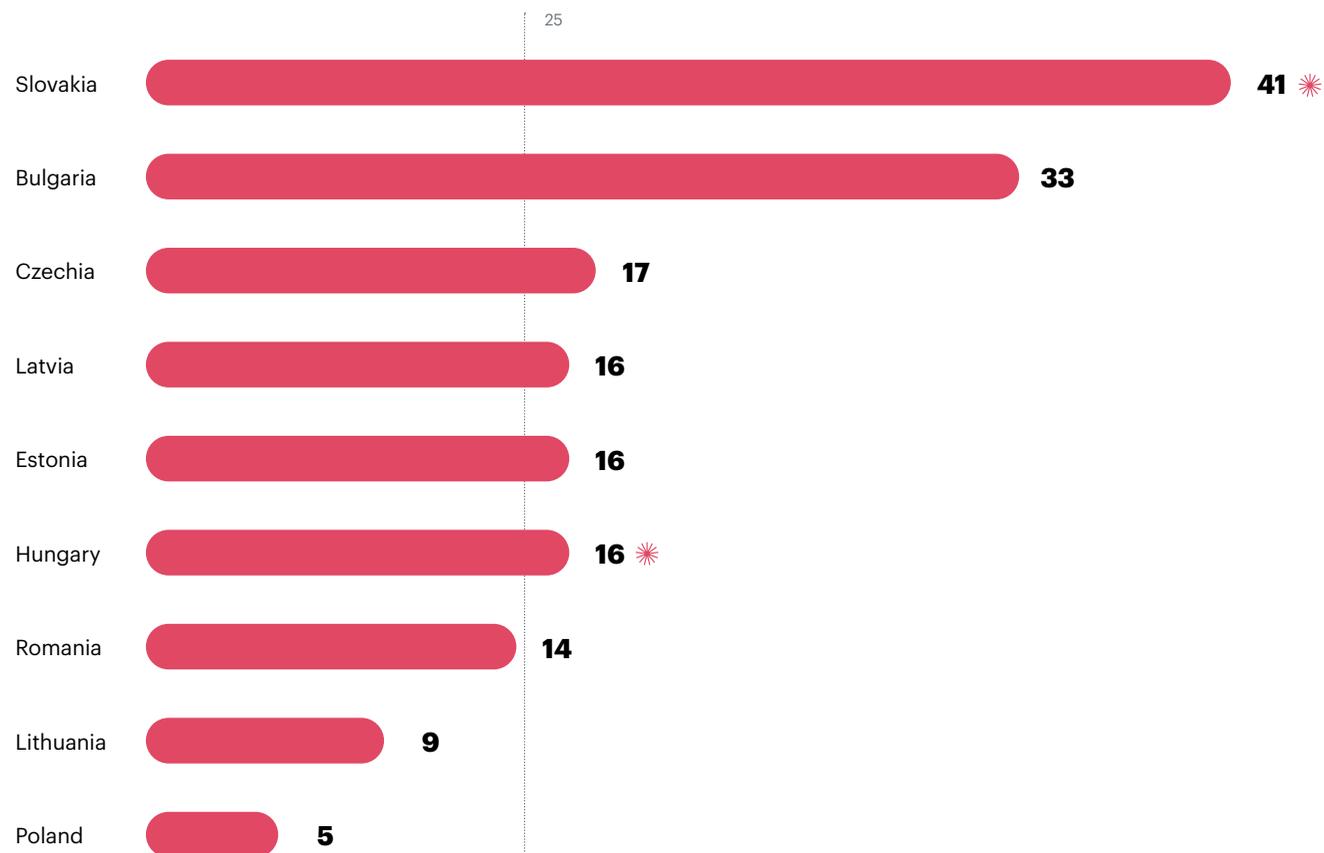




# US not a threat

Those who consider the US to be a security threat to their country (%)

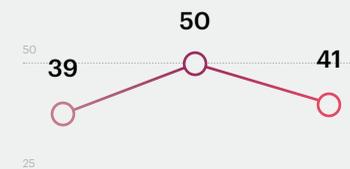
● 2024



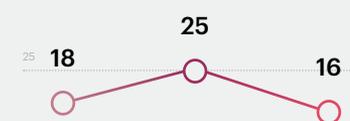
## Country focus: US as security threat over the years. (%)

● 2022 ● 2023 ● 2024

Slovakia



Hungary



The US, serving as the primary security guarantor and one of the most crucial strategic partners in the region, has been depicted as a security threat by Russian propaganda to undermine its position<sup>22</sup>. Despite the portrayal of the US and NATO as aggressors in the war in Ukraine<sup>23</sup>, the perception of the US as a threat to national security has remained consistently low across the region, except for Slovakia and Bulgaria.

# 76%

of CEE respondents do not consider the US to be a security threat for their country.

“The 2023 spike in Slovakia can be traced to intense campaigning during the pre-election period starting in 2022, in which anti-US narratives were extensively utilised by many leading political parties. These narratives predominantly related to the war in Ukraine, framing the US as a force pulling Slovakia into the war. The resonance of such rhetoric was confirmed in the GLOBSEC Trends 2023, in which 66% of Slovak respondents, the highest proportion in the region, agreed with such statement.”

 **Jana Kazaz,**  
GLOBSEC

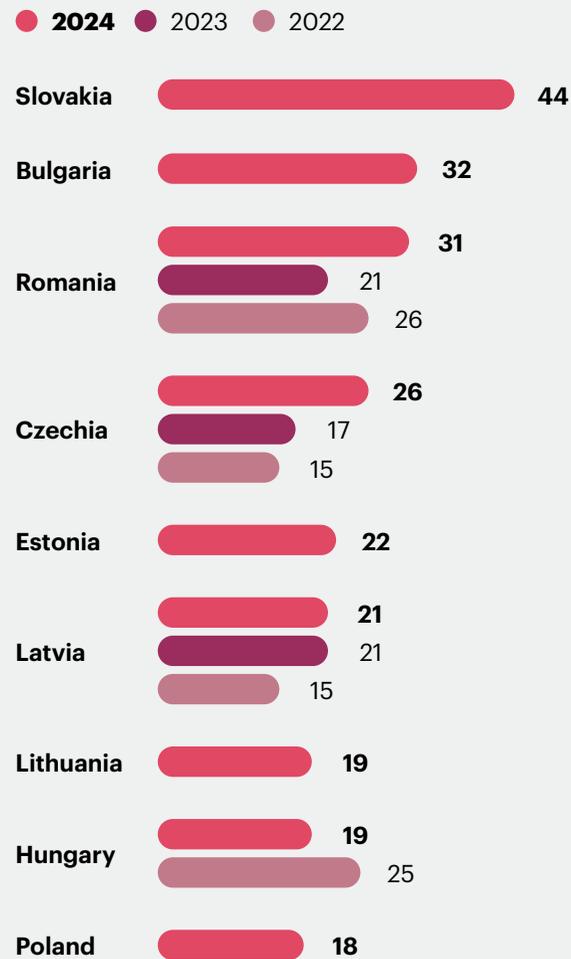
# Alleged threat of Western societies

Disinformation, polarising, and populist narratives have also taken root in the CEE region, although differences among countries persist. Slovak respondents are feeling most threatened by the Western society, with Bulgaria and Romania following closely behind. The long-term information operations orchestrated by the Kremlin, alongside declarations and activities of domestic actors, contribute to these perceptions, exemplified by narratives that suggest the decline of Western civilization due to its support for LGBTI+ rights, gender equality, and multiculturalism, labelling these as deviations from “traditional values.”<sup>24</sup> By invoking terms such as “tradition” and “family values,” the Kremlin positions itself as a moral counterbalance to the perceived decay of the West. Similarly, domestic actors often portray themselves as defenders of “national values” against these constructed threats and adversaries.

A peculiar case in this respect is Romania, where almost a third of respondents believe in the narrative of alleged Western threat while simultaneously exhibiting strong pro-West sentiments, as evidenced by its support for NATO and awareness of Russia. Conversely, the sense of threat from the “West” has been declining in Hungary, despite the government’s prolonged use of “anti-West” rhetoric.

## Those who agree that Western societies and their way of living threaten us. (%)

Some people claim that there are certain groups of people, countries or ideas that threaten our own identity and values. Do you personally think any of the following groups, countries or ideas threaten your identity and values or not? Western societies and their way of living.



The graph visualises data indicating shifts in public opinion, including the years when these shifts occurred.

# 44%

of Slovak respondents feel threatened by the Western societies.

“The data from Hungary can be partly explained by a portion of population embracing the government’s narrative that Hungarians are protected by the ruling party from Western values. Meanwhile, Hungarian opposition voters are decidedly pro-West, rarely perceiving the West as a threat at any level.”

**Patrick Szicherle,**  
GLOBSEC

“Given the occurrence of four types of elections and the rise of populist and extremist movements in Romania, elements of disinformation campaigns promoting the narrative of the “decadent West” have been amplified in the country’s information space, often aiming to sow distrust and discord among the population.”

**Matei Vrabie,**  
Funky Citizens

**52%**  
of CEE  
respondents see  
Ukraine's future  
in the EU, NATO  
or both.

**04**

## UKRAINE: CEE must do some work

The CEE region has been considered crucial in the provision of both rhetorical and material support for Ukraine since the outset of Russia's unjustified full-scale invasion. Such support is largely reflected in the public opinion that remains unchanged in 2024. Nonetheless, the differences between the countries are visible, public opinion in certain instances could present a significant challenge to European and Ukrainian decision-makers over the long term. In some CEE countries, there is a considerable number of respondents without a firm stance on issues related to Ukraine, making

them more vulnerable to information manipulation and thus potential targets for malign actors. Maintaining and bolstering popular support for Kyiv is crucial for the EU's security, as underscored by the case of Ukraine's withdrawal from Avdiivka in early 2024 due to a shortage of artillery shells<sup>25</sup>. In the meantime, malign actors will persist in targeting public opinion on this issue and fostering confusion about the war, aiming to exploit any possible vulnerabilities within CEE societies.

# Recognising Russia's wrongdoing

Which of these statements do you relate with the most?  
For the conflict in Ukraine is primarily responsible: (%)

Russia that invaded Ukraine    Ukraine that oppressed Russian-speaking part of population    West that provoked Russia    Do not know

● 2023 ● 2024    ● 2023 ● 2024    ● 2023 ● 2024    ● 2023 ● 2024

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



**61%**  
of respondents from the CEE region say Russia is primarily responsible for the war.



In 2024, an absolute majority in 7 out of 9 countries identified Russia as primarily responsible for the war in Ukraine. In Bulgaria and Slovakia, only a relative majority of respondents viewed Russia as the main perpetrator. For the second consecutive year, the majority of respondents in these two countries appeared more convinced by narratives propagated by the Kremlin to undermine support for Ukraine, suggesting that either Ukraine or the West is responsible. These

attitudes can be partly attributed to a generally Russia-friendly populace, based on historical ties<sup>26</sup> and the widespread concept of pan-Slavism<sup>27</sup>, as well as to narratives disseminated by local pro-Kremlin figures<sup>28</sup>. In Bulgaria, the influence of pro-Kremlin actors within the media sector and the shared Orthodox Christian religion with Russia are also significant factors of vulnerability<sup>29</sup>.

Public opinion has notably shifted in Latvia and Romania. The decrease in the former mainly translated into uncertainty, manifested by 19% of respondents either unsure of their answer to the question or choosing not to respond. In Romania, this shift has led to increased support for the narrative that Ukraine instigated the war, with additional respondents moving from blaming the West in 2023 to holding Ukraine accountable in 2024.

“The increased tendency among Romanians to perceive Ukraine as culpable for the war stems from the spread of narratives alleging mistreatment of all minorities by Ukraine, including the Romanian-speaking minority. These shifts in public opinion can also be attributed to war fatigue and frustration over the economic repercussions of the conflict.”

**Matei Vrabie,**  
Funky Citizens

The data underscore the need for effective strategic communication emphasising Russia's sole responsibility for the war, highlighting the atrocities committed by Russian soldiers in Ukraine, and elucidating the potential impacts on individual countries and the region should Russia emerge victorious from the conflict. This need is underscored by the observation that those who attribute the war

to Russia are less inclined to believe the widespread pro-Kremlin narrative that supplying weapons to Ukraine equates to provoking Russia and escalates the risk of war for their own country. Therefore, ensuring that the public comprehends Russia's exclusive culpability in the conflict will enhance their resilience against disinformation regarding Western military aid to Ukraine.

### Those who agree with the following statements: (%)

- Russia is primarily responsible for the war
- By providing military equipment and weapons to Ukraine, our country is provoking Russia and bringing itself closer to the war.

Hungary is not included in the chart because the latter question was not asked in the country due to the lack of provision of military support.



# Ukraine's future

In the CEE region, there is no country where the absolute majority of respondents envision Ukraine as a member of both the EU and NATO, despite this being the objective of Ukraine's current leadership and supported by the majority of the Ukrainian population<sup>30</sup>. In 6 out of 9 countries surveyed, the relative majority of CEE respondents advocate for Ukraine's membership in both the EU and NATO, with at least another 10% in favour of Ukraine joining one of the two organisations.

In Czechia, Hungary, and Slovakia, the prevailing view is that Ukraine should remain a neutral country, which confirms the ongoing allure of so-called "peace" narratives centred on Ukraine maintaining neutrality,<sup>31</sup> a status expressly desired by the Kremlin<sup>32</sup>. In Czechia, however, overall support for Ukraine's membership in either or both organisations significantly exceeds those favouring neutrality, unlike in Hungary and Slovakia where a greater number of people prefer to see Ukraine maintain a neutral stance than join either or both blocs. The data suggests that public opinion in these two countries could represent a significant obstacle to Ukraine's long-term ambitions.

## Should Ukraine be/become... (%)

	a member of EU	a member of NATO	a member of EU and NATO	a neutral country	in the Russian sphere of influence
Bulgaria	8	2	31	30	10
Czechia	10	10	35	36	4
Estonia	6	6	48	29	2
Hungary	8	4	24	57	3
Latvia	6	6	49	28	1
Lithuania	11	6	49	20	1
Poland	11	14	40	24	3
Romania	8	10	40	30	7
Slovakia	11	3	15	49	11

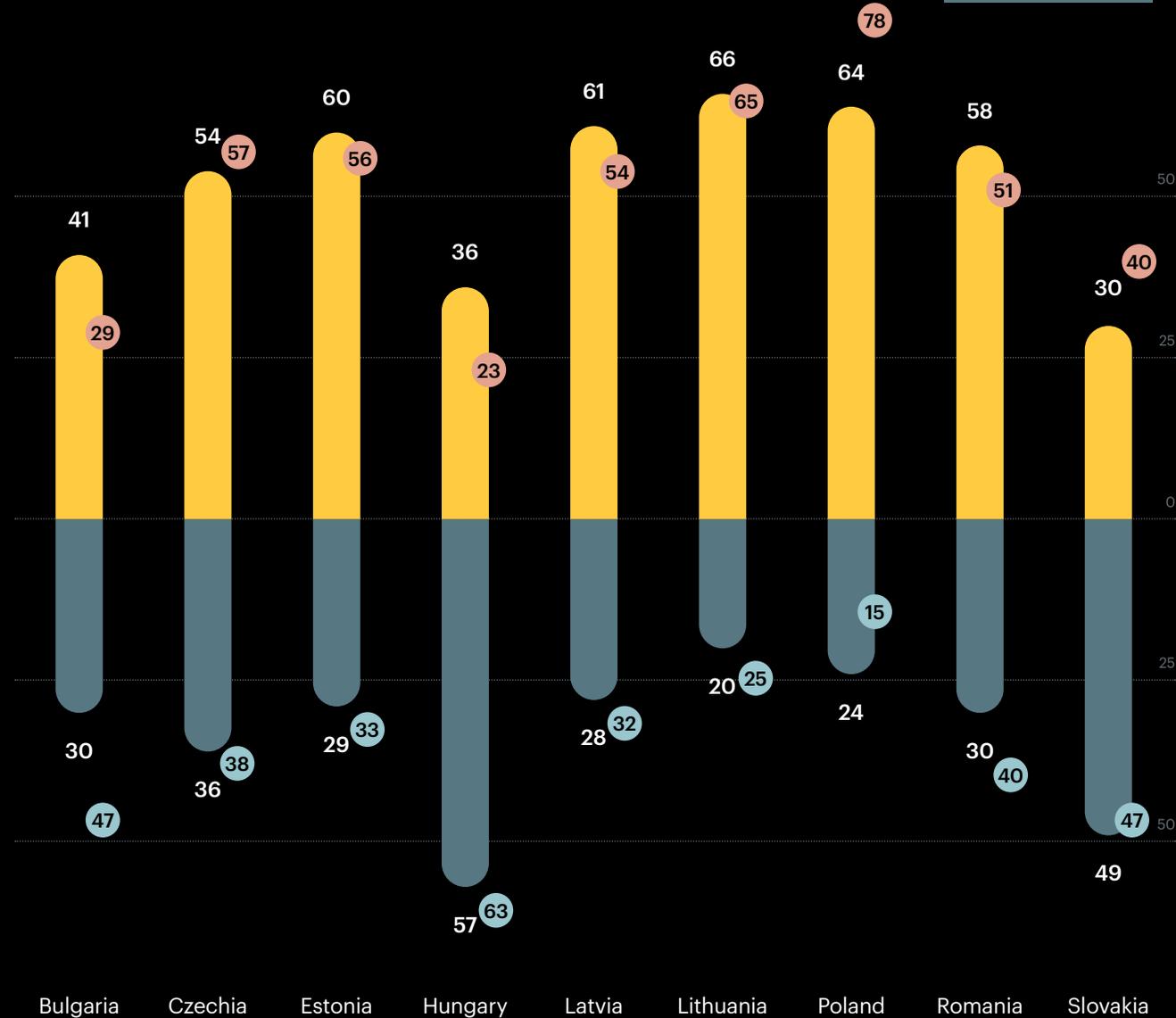
# Change since 2022

## Should Ukraine be/become part of the EU, NATO or both. (%)

A member of the EU, NATO, or both  
● 2024 ● 2022

A neutral country  
● 2024 ● 2022

The 'EU and NATO' category merges the proportion of those who answered that Ukraine should be either in the EU or NATO, and both the EU and NATO to gauge overall backing for Ukraine's Transatlantic orientation.



Shifts over two years reveal an overall increase in respondents who believe Ukraine should join the EU, NATO, or both. Only Poland and Slovakia notably deviate from this trend, although Poland continues to be one of the strongest proponents of Ukraine's NATO membership in the region. Along with the three Baltic states, it is among the countries with

absolute majorities in favour of Ukraine joining both blocs, aligning with the rhetoric and actions of their political leadership<sup>33</sup>. The cases of Bulgaria and Hungary demonstrate that people can be persuaded of the merits of supporting Ukraine, even within predominantly pro-Kremlin environments.

Examining EU and NATO membership individually, the dynamics differ from one country to another but indicate an increase in support across most of them.

The data show that widespread support exists within the CEE region for Ukraine to join the Western institutional framework. However, considerable effort is still required on this topic, although the magnitude of the task varies from country to country. Concerns regarding the impact of Ukraine's EU membership on the agricultural sector, for example, have already sparked significant tensions<sup>34</sup>.

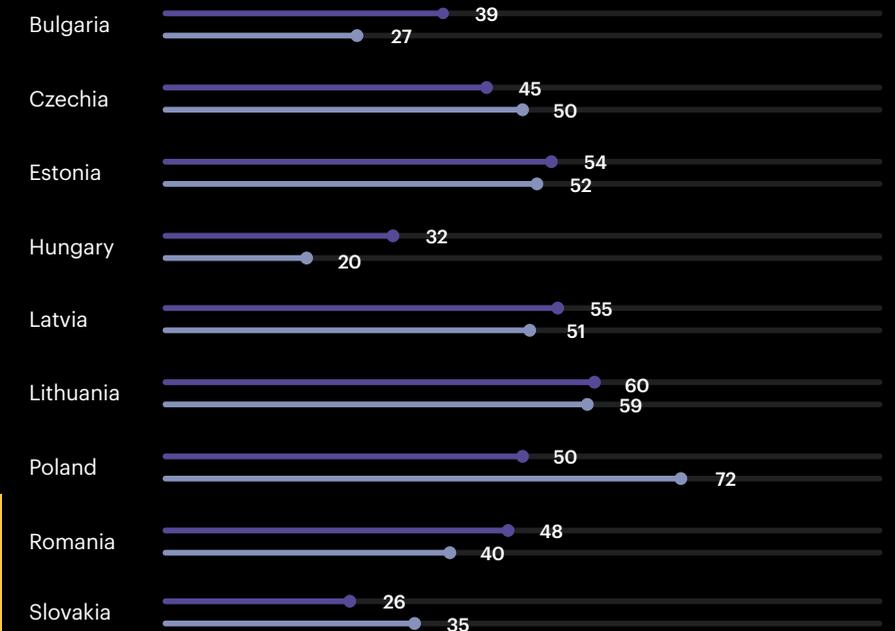
"Due to concerns surrounding agricultural imports, Polish perspectives on Ukraine's EU membership are shaped by fears of economic competition. Poles worry that Ukrainian agricultural products could destabilise the Polish market. Meanwhile, enthusiasm for Ukraine's NATO membership is waning among Poles, driven by increasing scepticism regarding Kyiv's victory and influenced by local pro-Kremlin narratives about the mobilisation of the Polish army for a premeditated war against Russia, portraying Poles as cannon fodder for foreign interests."

**Paweł Terpilowski,**  
Demagog Poland

## Those who agree that Ukraine should be/become part of the EU or both the EU and NATO. (%)

● 2024 ● 2022

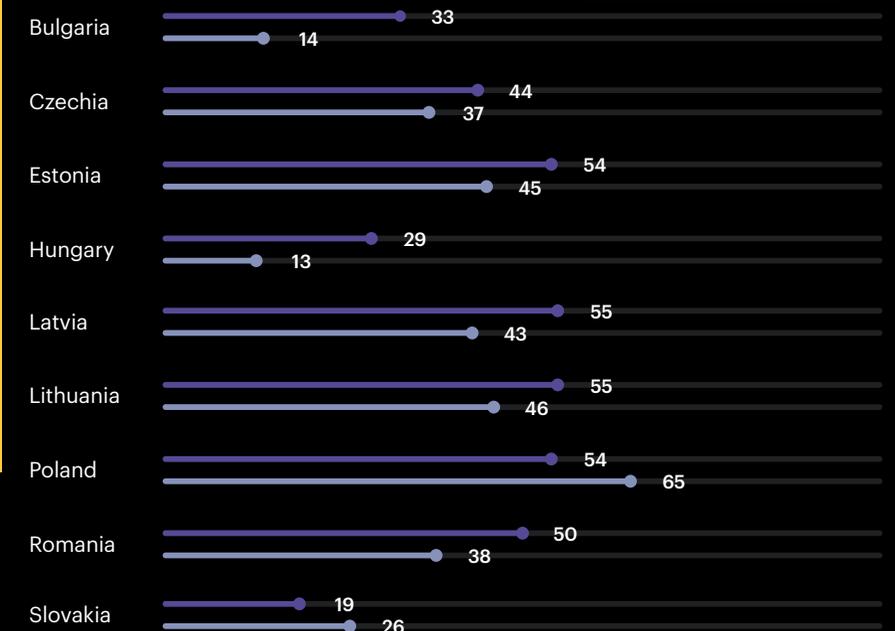
Support for Ukraine's EU membership (respondents who said they see Ukraine in EU or both EU and NATO)



## Those who agree that Ukraine should be/become part of NATO or both the EU and NATO. (%)

● 2024 ● 2022

Support for Ukraine's NATO membership (respondents who said they see Ukraine in NATO and both EU and NATO).



# Fears must be addressed

In all eight countries<sup>35</sup>, a majority of respondents agreed that supplying Ukraine with weapons aids in their defence against Russia. A narrative undermining support for Ukraine in its struggle for freedom, however, also resonates within the region.

Even in Poland, for instance, one-third of respondents concur that arms deliveries to Ukraine provoke Russia and escalate the conflict. These results underline that Central and Eastern Europeans recognise the importance of assisting Kyiv in its resistance against Russia, but pro-Kremlin narratives, which threaten the West with war<sup>36</sup>, have also left an imprint on public opinion.

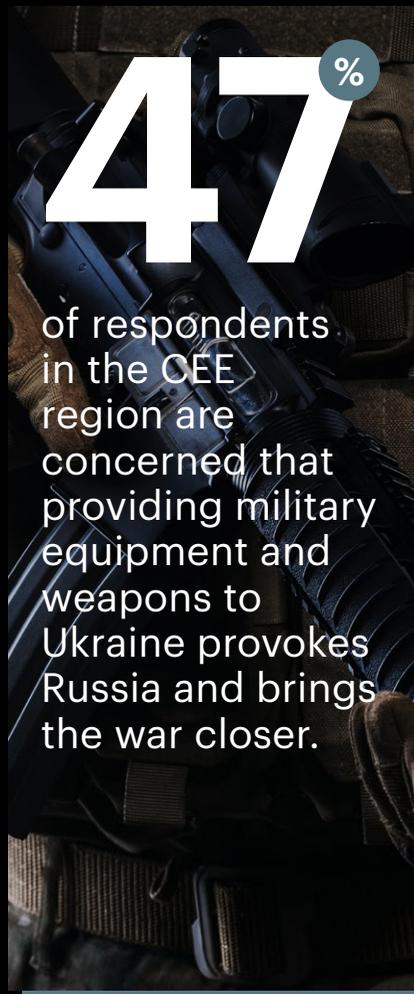
Latvia and Lithuania deserve special mention, as the most significant shifts in public opinion occurred among respondents in these two Baltic countries.

“Vladimir Putin’s war rhetoric against the Baltics has been intensifying and accompanied by frequent Kremlin-controlled media coverage. Consequently, concerns about a potential upcoming war have been rising among the population in Latvia, and populist/pro-Kremlin channels on social media have intensified promotion of views that the support for Ukraine is provoking a war with Russia.”

 **Linda Curika**,  
University of Latvia

“It could be argued that this outcome, concerning fears of provoking a war with Russia, reflects a general atmosphere of apprehension in the region, particularly in light of the significant losses Ukraine experienced at the start of 2024, such as the retreat of the Ukrainian Armed Forces from Avdiivka. This situation may be exacerbated by concerns that Lithuania and the Baltic states at large could be next should Ukraine succumb.”

 **Balys Liubinavičius**,  
Debunk.org



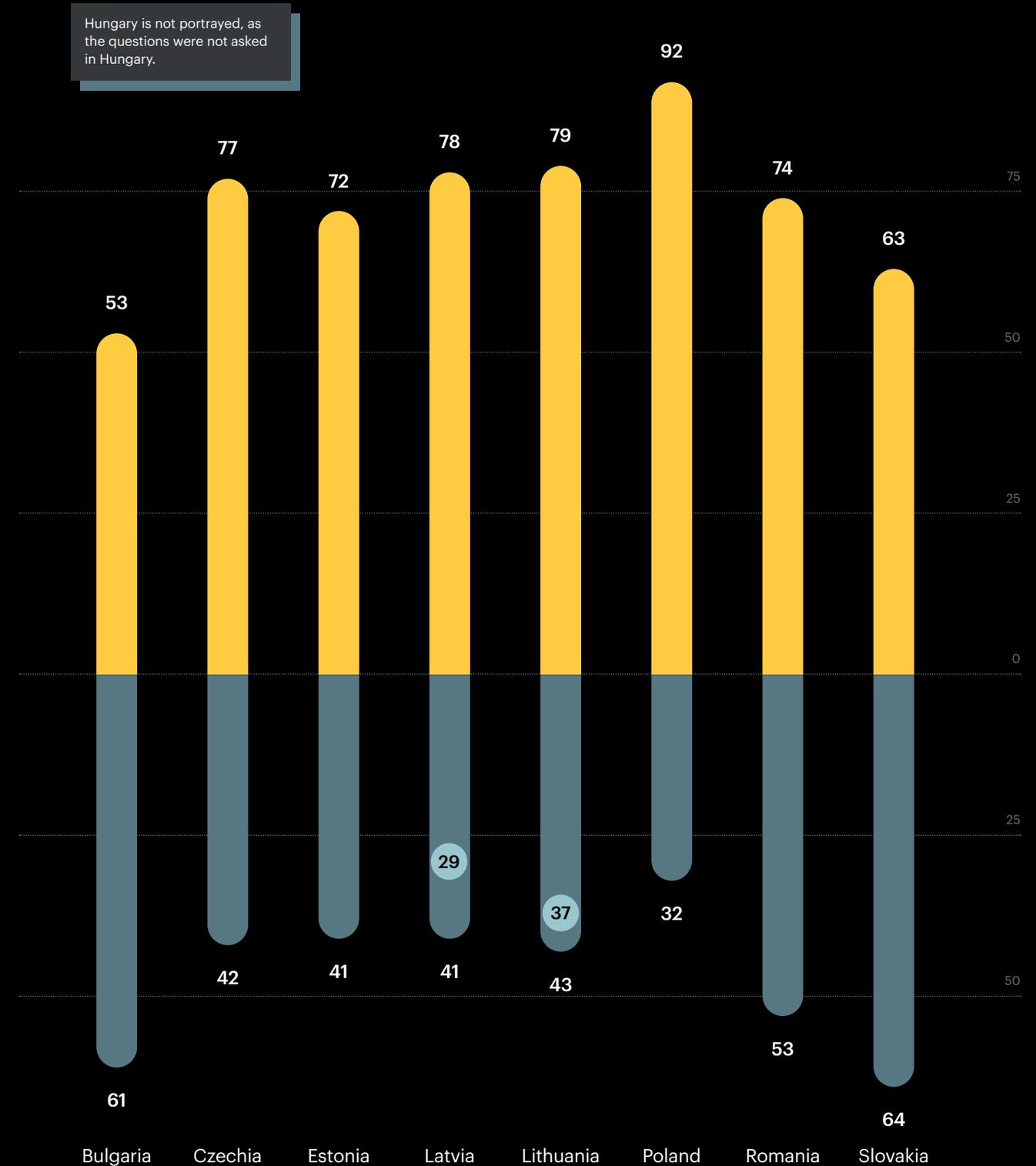
## Those who agree with the following statements: (%)

By providing military equipment and weapons to Ukraine, [our country] is helping Ukraine defend itself against Russia

By providing military equipment and weapons to Ukraine, [our country] is provoking Russia and bringing itself closer to the war

● 2024

● 2024 ● 2023



# Ukrainian migrants are preferred

The majority of CEE respondents across all countries do not feel threatened by migrants from Ukraine. Conversely, in 7 out of 9 countries, a majority perceive migrants arriving from other non-European countries as a threat. This perception disparity between the two groups can be attributed to the prevalent anti-migration narratives across the EU, which largely focus on arrivals who are culturally distinct from the majority of the European population<sup>37</sup> — unlike those from Ukraine.

Romania presents a notable exception, where only 35% of respondents felt threatened by non-European migrants, a figure merely 5 percentage points higher than for Ukrainian migrants. This suggests a third of the local population opposes immigration under any circumstances. However, Romania lacks the segment of respondents who oppose immigration solely based on specific backgrounds, unlike the other 8 countries, where the difference between the two groups is at least 23 percentage points.

**29%**  
of CEE respondents believe migrants from Ukraine threaten their identity and values.

In contrast, **57%** view migrants from outside of Europe as a threat.

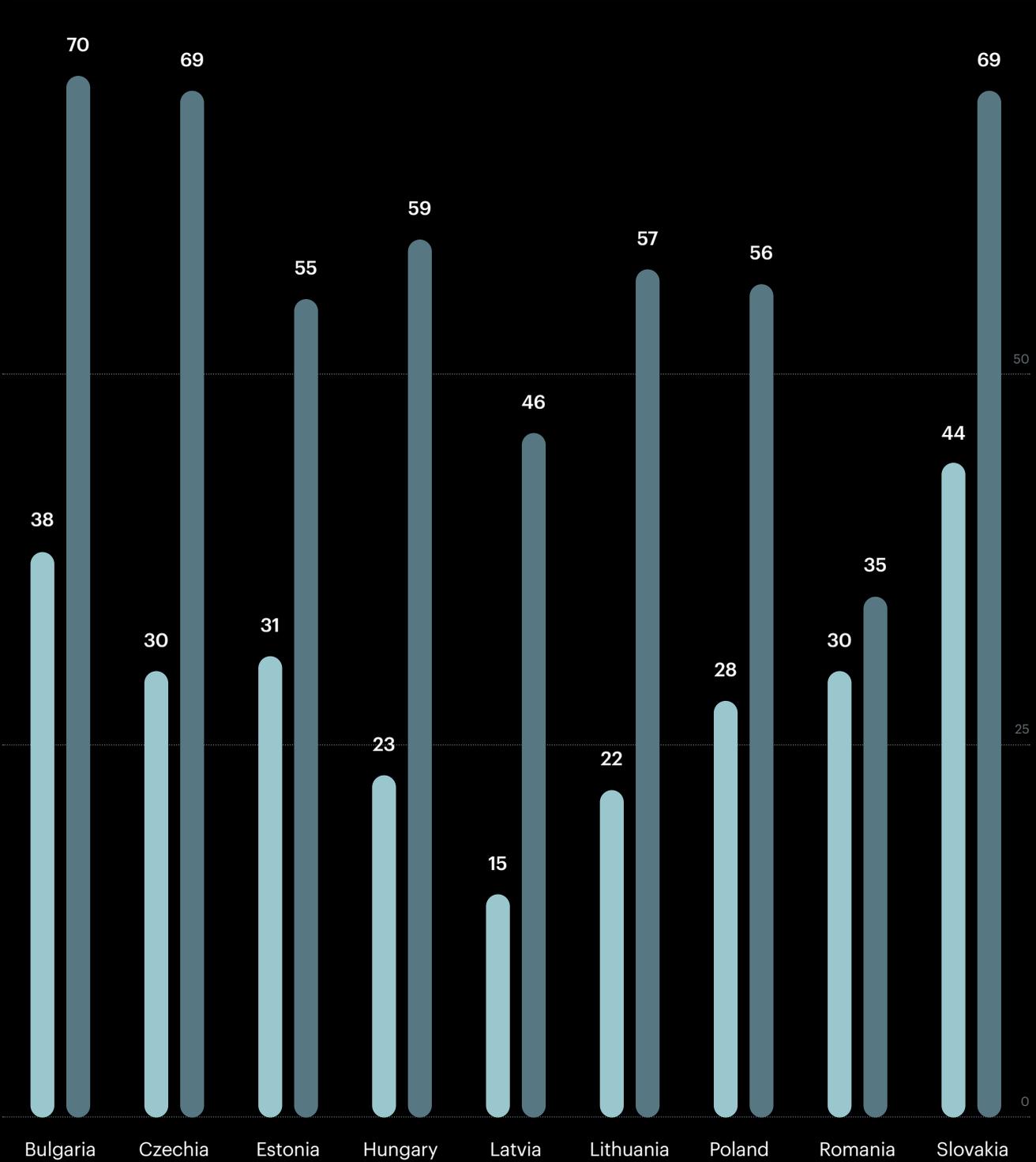
“Given Romania’s history of multiculturalism and its status as a destination for various migration waves, the country has developed a more open attitude towards migrants and diversity compared to its regional counterparts. This historical backdrop has likely played a crucial role in shaping Romanians’ views on migration. In recent years, economic considerations, such as labour shortages and demographic challenges, have also encouraged a pragmatic approach to the issue.”

**Elena Calistru,**  
Funky Citizens

Some people claim there are certain groups of people, countries or ideas that threaten our own identity and values. Do you personally think any of the following groups, countries or ideas threaten your identity and values or not? (%)

Yes, they threaten

- Migrants coming from Ukraine
- Migrants coming from other countries outside of Europe





05

82%

of CEE respondents believe democracy is a good system for their country.

## Democracy not in crisis

As a substantial portion of EU citizens head to the polls in 2024, perceptions of democracy, its core values, and the institutions necessary for its functioning become particularly important. Overall, this year's results demonstrate that appreciation for democracy, based on respect for human rights and the rule of law, is stable and shared by a majority across the region.

Compared to previous years, when we inquired about support for a "strong leader" who does not have to bother with elections or parliament - a question that

offered a wider scope for interpretation - this year offers a clearer view of the support for a totalitarian regime. While most CEE citizens reject the idea of totalitarianism and embrace democracy, some findings should sound the alarm for pro-democracy actors. In addition to the lack of acceptance of minorities and trust in the media, vulnerabilities are stemming mostly from a lack of understanding of key concepts and their implications for citizens' daily lives, including liberal democracy, totalitarianism, or far-right extremism.

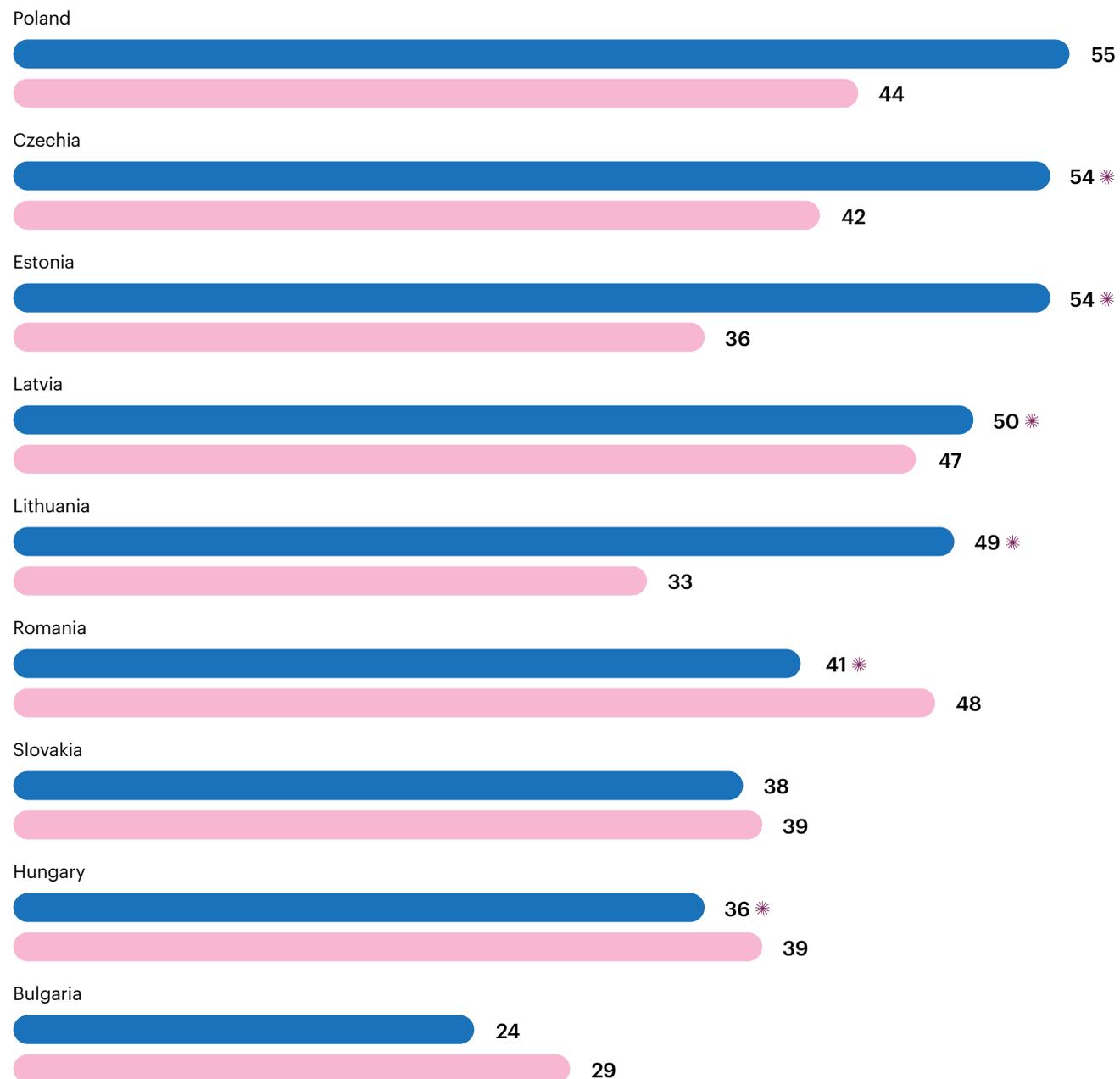
# Satisfied? Not? That is the question.

If you take all circumstances into account, to what extent are you overall satisfied with how democracy works in your country? (%)

● Satisfied

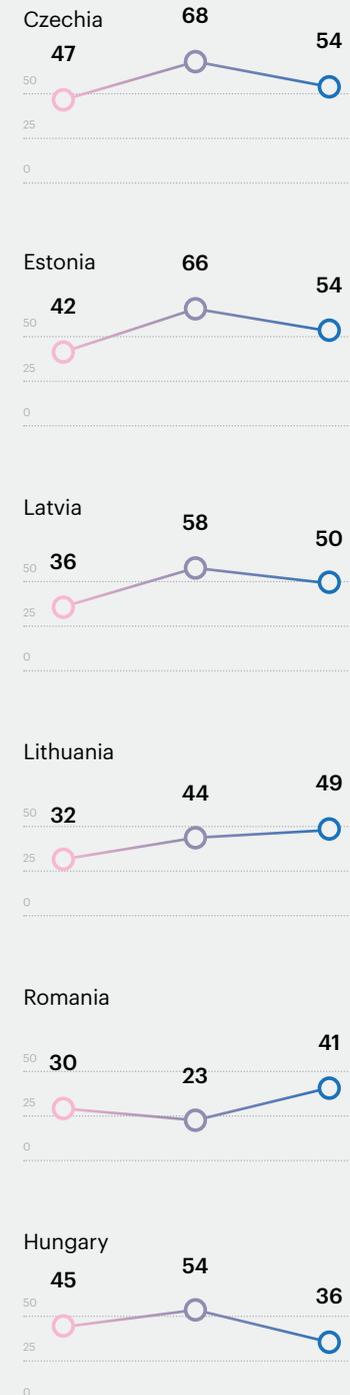
How much do you personally trust or distrust the government in your country? (%)

● Definitely or rather trust



## Country focus: Satisfaction with democracy over the years (%)

● 2020 ● 2022 ● 2024



In 7 of 9 surveyed countries, satisfaction with how democracy functions is higher than in 2020, yet this varies significantly from country to country, both in terms of differing levels of satisfaction and shifts over the years. In some countries, such as Bulgaria, Poland, and Slovakia, the level of satisfaction with democracy has remained relatively stable since 2020. In contrast, satisfaction in other countries fluctuates in various directions.

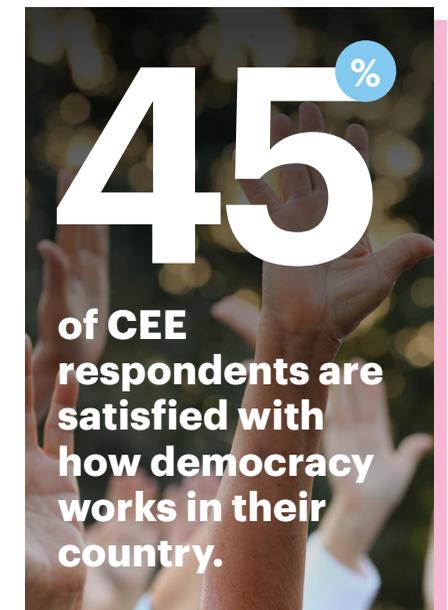
A consistent rise in satisfaction was only observed in Lithuania and Romania, whereas the rest of the countries experienced a different trend, with a spike in 2022 followed by a decline in 2024. The spike is likely attributable to the full-scale invasion of Ukraine, which may have led societies to appreciate the value of living in a secure democratic system, subsequently lowering expectations in other areas of concern. The wave of societal solidarity expressed towards Ukraine, including the large-scale acceptance of refugees, could be another contributing factor to the spike. Two years into the war, these attitudes have declined, though not to 2020 levels.

The abovementioned theory is further supported by the fact that attitudes towards the war in Ukraine correlate with satisfaction with democracy. Societies in which both leaders and citizens have consistently shown strong support for Ukraine and identified Russia as both the aggressor and security threat also express greater satisfaction with the functioning of democracy in their own country.

Moreover, the data suggests that satisfaction with democracy does not necessarily correlate

with political turmoil and shifts in government. The three countries with stable levels of satisfaction —Bulgaria, Poland, and Slovakia— have experienced significant governmental changes over the past four years. Satisfaction with democracy neither automatically aligns with trust in one's government, as demonstrated by the figures in Czechia, Estonia, and Lithuania.

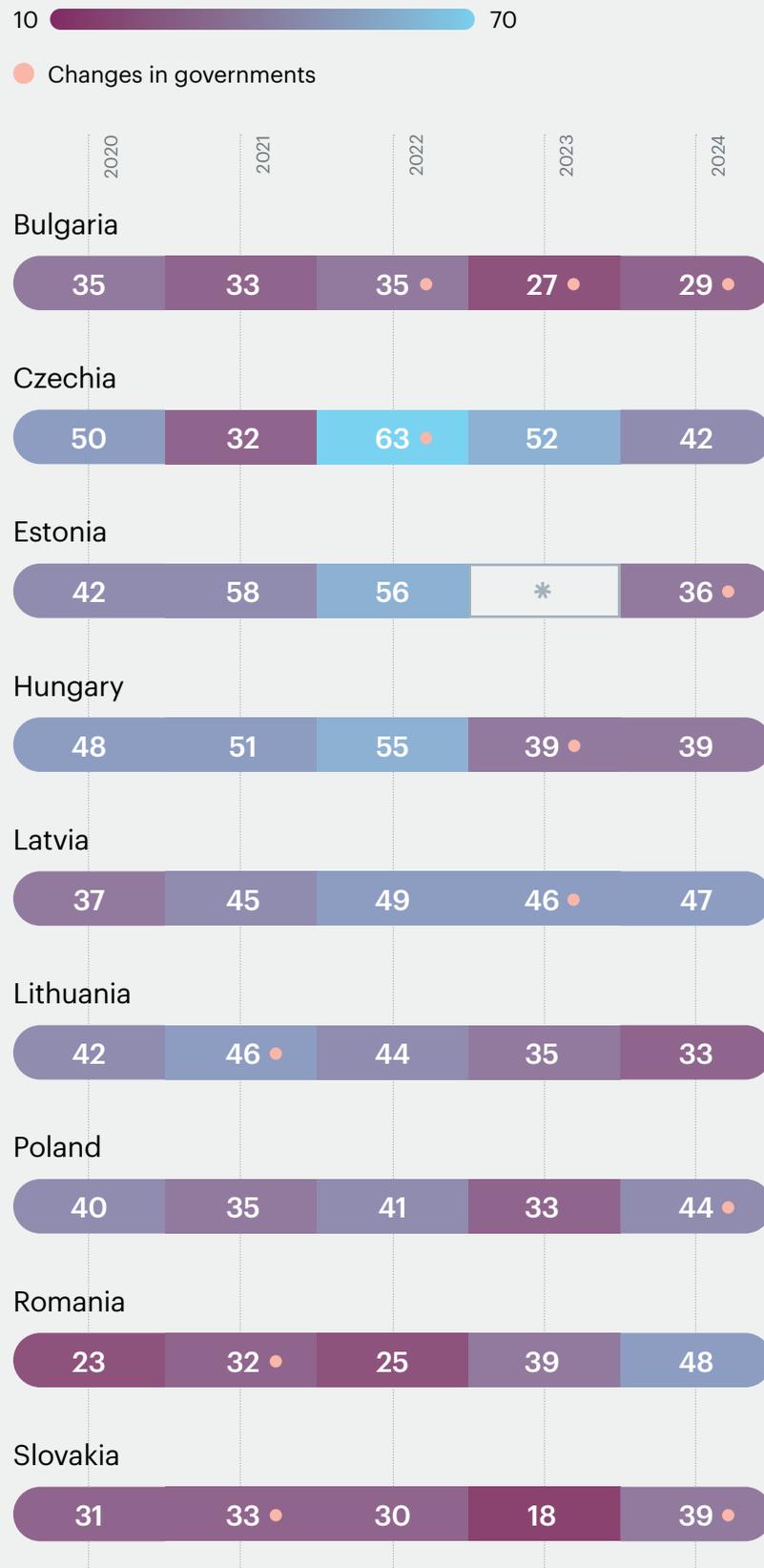
Hungary stands out as the only country where satisfaction with democracy is considerably lower than in 2020 or 2022. Concurrently, respondents expressed more extreme views on a more sensitive scale, indicating greater polarisation on this issue—15% of Hungarians were very satisfied with democracy, the highest percentage in CEE, while 45% were very dissatisfied, also the highest amount in the region.



# Trust not so stable

Compared to previous years, trust in governments is more evenly distributed across the region, with less variation between the countries surveyed. The average trust in government stands at 40%, and the gap between the most trusted government in Romania and the least trusted government in Bulgaria is notably narrower than in 2022. Similar to satisfaction with democracy, trust in government tends to be more volatile in certain countries, specifically Czechia, Hungary, Estonia, and Romania.

## Trust in government over the years (%)



\* In 2023 GLOBSEC did not conduct polling in Estonia.

# Baltic presidents most trusted

As in previous years, the average trust in the countries' presidents remains significantly higher than in their governments. Given that all the surveyed countries operate under parliamentary democracies, the role of the president is more representative than involved in policy-making, which likely contributes to this phenomenon.

This year, however, the presidents of the Baltic states enjoy notably higher trust levels than their counterparts in other countries. The trust levels for presidents of Hungary and Slovakia are not showcased, as new presidents were either appointed or elected during the polling and around the publication of the report.

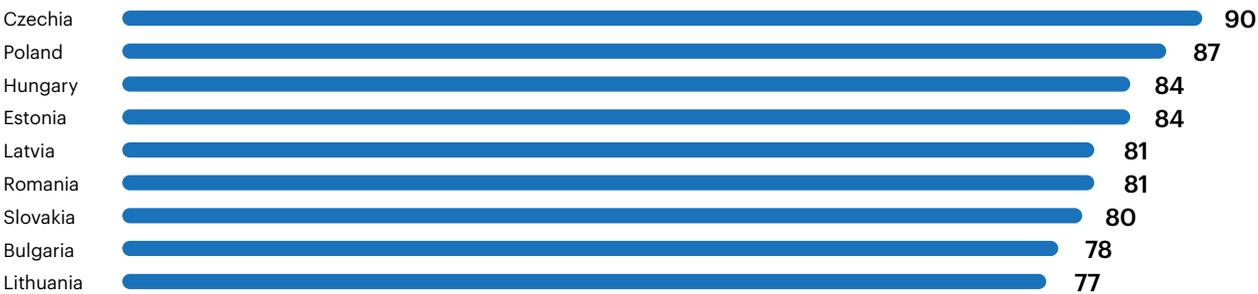
## Trust in president (%)



Data for the Hungarian and Slovak presidents are not included because changes in the presidency occurred either during or after the publication of this report.

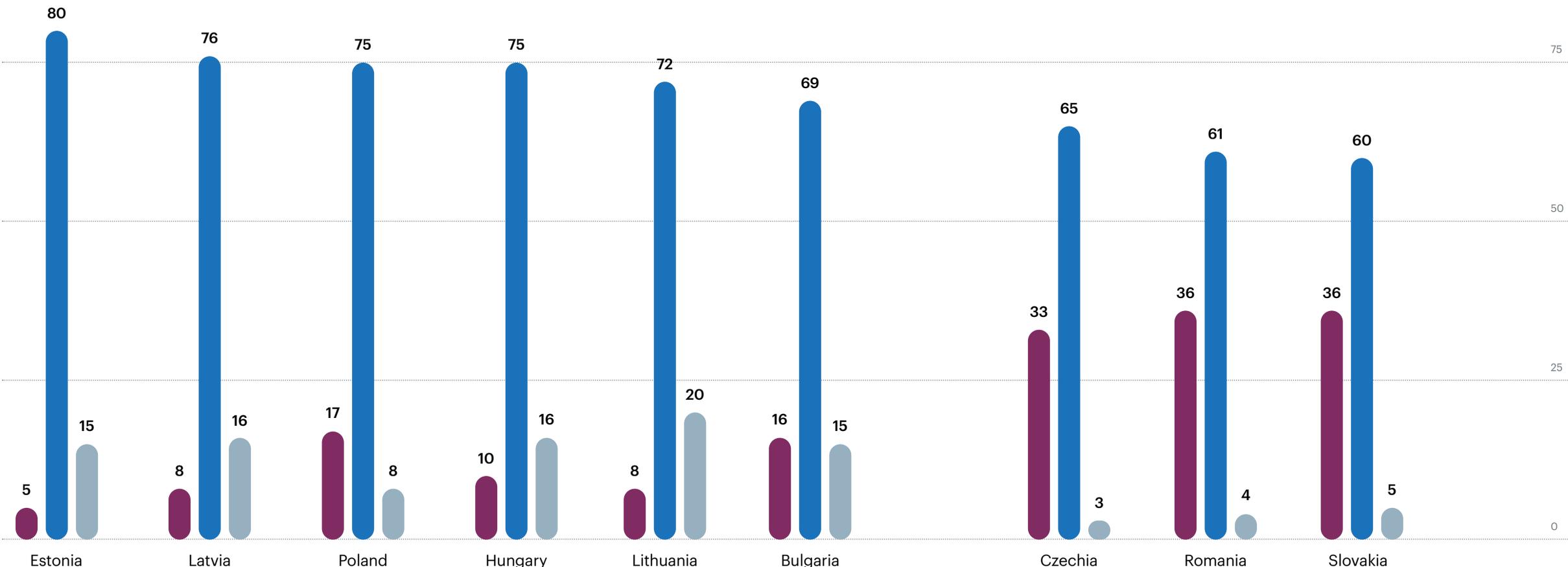
# Democracy wins, with a totalitarian wink

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



Totalitarian system without regular elections is good for our country. (%)

● Agree ● Disagree ● Do not know (not read)



The perception of democracy as a beneficial form of governance for one's country has been overwhelmingly shared across CEE since the inception of the GLOBSEC Trends polling. 82% of respondents across the region concur with the statement that democracy, as a system grounded in equality, human rights, freedoms, and the rule of law, is advantageous for their country, with only minor variations.

Support for a totalitarian regime, however, shows more significant differences, with Slovakia, Romania, and, to a certain degree, Czechia, standing out as notable outliers. The fact that a third of respondents in these 3 countries approve of a totalitarian system should be a cause for concern. Equally alarming is the 15-20% of respondents in 6 of 9 countries who are either unable or unwilling to address the question. These findings indicate a potential lack of education or public discourse on the signs and perils of a totalitarian regime, which could be, or is already, exploited by extremist political actors.

"The appeal of a totalitarian regime stems from various historical and political factors and should be quickly addressed before these sentiments are fully exploited."

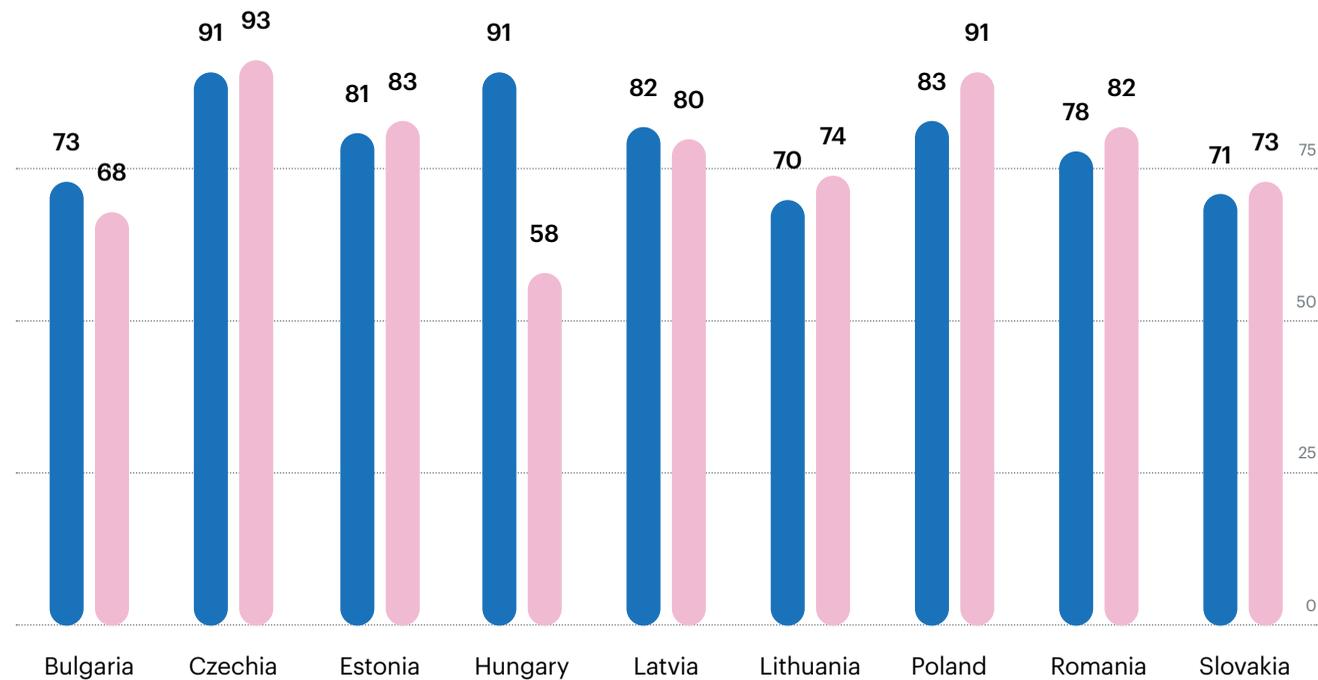
**Dominika Hajdu,**  
GLOBSEC

# Liberal complexity

Those who agree with the following statements:

● **Respect and tolerance towards each other, no matter the sexual orientation of colour of the skin is important for our society.** (%)

● **We live in a liberal democracy where individual rights and freedoms should be protected, and it should stay that way.** (%)



Previous GLOBSEC polls have shown a lower level of support for liberal democracy as a preferred form of governance for the respondents' country compared to "just" democracy, even when both were defined in the same manner<sup>38</sup>. The general interpretation was associated with "liberalism" and anything prefixed with "liberal" being demonised by nationalistic populists to spread fear and gain political advantage. However, the responses to this year's statements reveal a more nuanced attitude. They indicate that when liberal democracy is portrayed not as an external

concept but as integral to the existing system, acceptance of liberal democracy significantly increases.

Hungary presents a significant anomaly, where support for tolerance ranks among the highest in CEE, yet only 58% affirm living in a liberal democracy and wish for it to continue as such. This considerable discrepancy might stem from the perception among many Hungarians that their system does not qualify as a liberal democracy, evidenced in international indices<sup>39</sup>, as well as Viktor

Orbán's portrayal<sup>40</sup> of Hungary as embodying an illiberal<sup>41</sup> democracy, as a supposed contrast to liberal democracy.

Czechia also presents a paradox of contrasting support for totalitarianism with an overwhelming 93% of respondents backing liberal democracy. On the contrary, Lithuania consistently exhibits low support for the human rights and values underpinning liberal democracy, contrasting with its progressively tolerant stance towards Ukraine.

## Those who agreed that liberal democracy as a system based on equality, human rights and freedoms, rule of law is good for our country, in 2023. (%)

Data from the polling conducted in 2023, data for Estonia showcase responses from 2022.



"Czech citizens often base their assessment of the country's post-communist evolution on its international standing, participation in multinational organisations, and handling of complex issues like migration and the pandemic. Attitudes towards the democratic era are shaped more by the challenges encountered by citizens rather than the political system per se. Conversely, disillusionment with democracy's inability to address socioeconomic disparities, perceptions of inefficiency or corruption within democratic institutions, or nostalgia for the perceived stability and order of a bygone regime might enhance the allure of totalitarianism."

**Kristína Šefčíková,**  
Prague Security Studies Institute

## Liberalism as a threat not appealing

The tactics of demonising liberalism and portraying it as a threat to traditional values do not resonate with the majority in every CEE country. Slovakia is an outlier in this context, not solely because the narrative of liberalism posing a threat resonates with 43% of respondents - twice the regional average. Slovakia also distinguishes itself because a significant portion of its society (at least 16%) concurrently believes that living in a liberal

democracy is beneficial and that liberal democracy represents a threat. This paradoxical overlap can be attributed to a tendency to lack rational assessment of statements that echo the rhetoric of favoured political representatives.

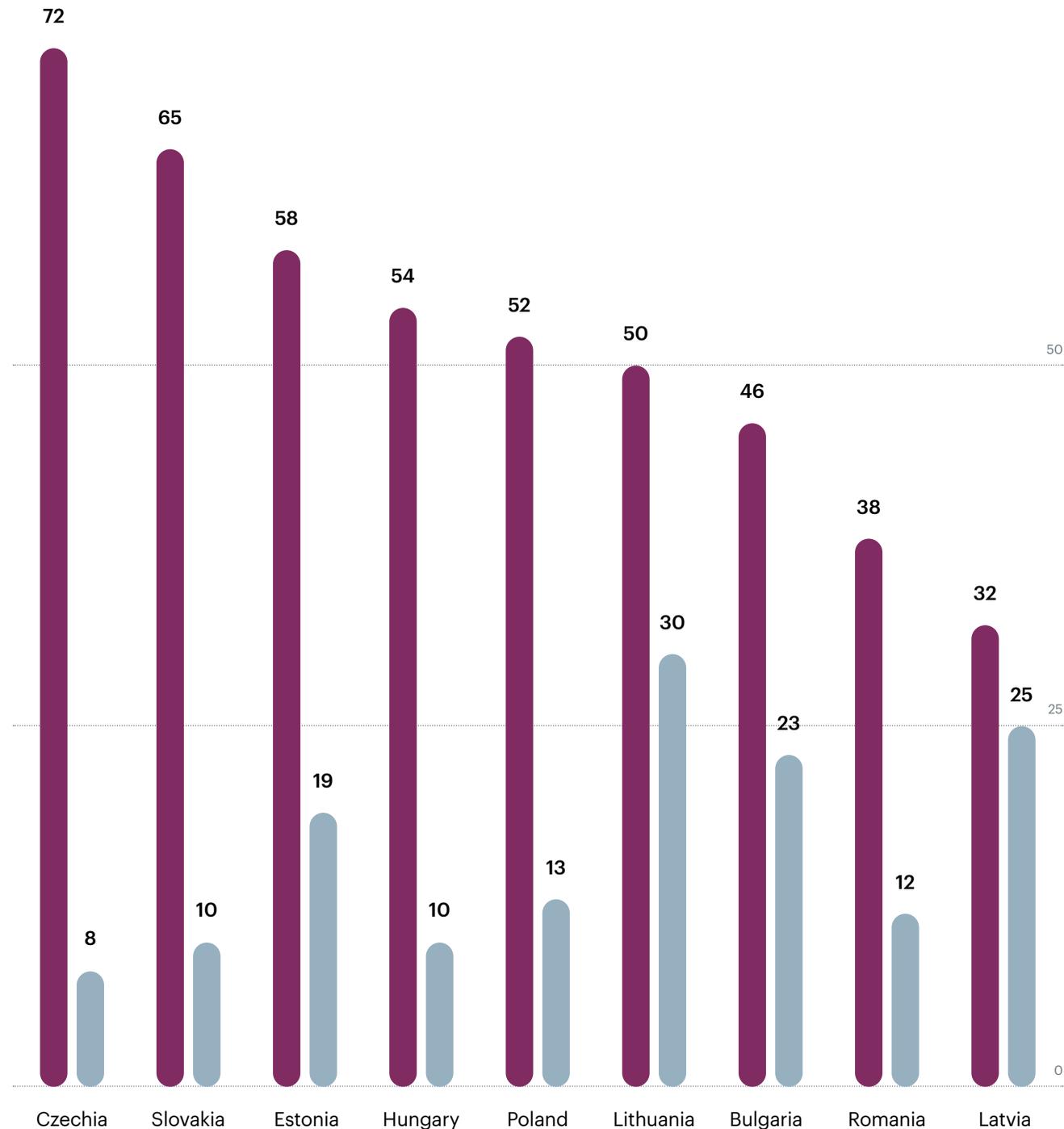
## Those who believe that liberal democracy threatens their own identity and values. (%)



# A true threat

## Those who believe that far-right nationalists threaten their own identity and values. (%)

● Agree ● Do not know (not read)



In contrast to liberal democracy, far-right nationalism poses a genuine threat to the democratic values and principles upon which 21<sup>st</sup> century societies have been established. The threat of far-right nationalism is most acknowledged in Czechia and Slovakia. Latvia, Romania, and Bulgaria, on the other hand, are at the opposite spectrum, with the majority not recognising far-right nationalism as a threat. The precise interpretation of the results indicates a need for further research into people’s understanding of far-right nationalism, especially at times when terms like “fascism” and “Nazism” are carelessly used to label opponents.

The low recognition of far-right nationalism as a threat in many countries can be attributed to the high number of individuals who either did not want to or could not respond to the question. This reveals a degree of vulnerability similar to that observed in the question of support for a totalitarian regime. If societies cannot comprehend the dangers posed by far-right nationalism and acknowledge it as a threat, they become susceptible to its influences.

“Far-right groups have gradually become part of the mainstream political, societal, and media discourse. Although some political figures have condemned far-right groups as a threat, there has not been a unified and clear-cut stance against them among the majority of major political parties in Bulgaria. The combination of political and media “normalisation” of far-right positions, alongside occasional societal and political pushback, has made it challenging for citizens to orient themselves and adopt a decisive stance.”

“” **Rumena Filipova,**  
Institute for Global Analytics

“The discussion about far-right nationalism in Romania is not as prevalent, and it is possible that awareness of the issue is very low. At the same time, the prevalence of narratives such as “Romania being treated as a colony by the West” or “Romania as a second-hand European country”, due to the Schengen debacle, might suggest to many that there are no “true nationalists” and that more patriotism might be needed, hence far-right nationalism is not seen as a problem.”

“” **Elena Calistru,**  
Funky Citizens

**17%**  
of CEE respondents cannot determine whether far-right nationalism poses a threat to their values and identity.

“While other countries in the region are experiencing political turbulence, Czechia maintains a relatively stable political scene, which supports the perception of threats posed by far-right ideologies. Recently, Czech law enforcement has intensified efforts to prosecute members of the far-right nationalist community found guilty of inciting hate and violence against certain societal groups or harassing medical personnel during the pandemic. These cases received considerable media attention and might have heightened Czech vigilance towards the dangers of far-right ideologies.”

“” **Kristina Šefčíková,**  
Prague Security Studies Institute

46%

of CEE respondents trust standard mainstream media in their country.

06

# Media: Free but not so trusted

The media play a pivotal role in bolstering societal resilience and safeguarding democracies. Investigative journalists unearth corruption scandals, malign influences, and set the agenda on issues meriting public attention. Trust in the media is thus essential for the robust functioning of democracy. Amid a global trend of diminishing trust in institutions, trust in media within CEE mirrors that of its Western European counterparts<sup>42</sup>.

While the media should be subject to public scrutiny, investigative journalists are increasingly targeted by smear

campaigns, hate speech, and even death threats. Such practices, coupled with efforts to exert governmental control over public media, are concurrent with the democratic backsliding observed in several CEE nations<sup>43</sup>.

The recent enactment of the European Media Freedom Act<sup>44</sup>, aimed at enhancing the protection of journalists and media from political interference, increasing transparency of media ownership, and facilitating access to media diversity<sup>45</sup>, signals a potential shift towards a better information environment in CEE.

# Perception of media freedom increased

## Independence ≠ trust (%)

Those who consider their media rather or completely free

Those who trust the media

● 2024 ● 2023

● 2024 ● 2023

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



On average, 57% of respondents across CEE consider the media to be completely or relatively free. This represents a 5 percentage point increase over the past year, driven by changes in perceptions in Bulgaria, Poland and Slovakia. This trend aligns with the findings of the World Press Freedom Index 2023<sup>46</sup>, where 8 of the 9 countries analysed showed improvement compared to 2022. However, the perception that standard media are completely or relatively free does not automatically equate to trust in them.

## World Press Freedom Index 2023



## Independence does not equate trust

Years of smear attacks that have undermined the credibility of investigative journalists, along with practices of political capture and editorial changes demanded by the owners, have eroded trust in standard media among citizens. The paradox of believing the media to be free while not trusting them has been widespread in the CEE region, although the trust has been increasing - 46% of CEE respondents now trust standard media, with notable increases observed in Slovakia, Poland, and Hungary. The rise in trust in Poland could be attributed to the change in government, whereas the situation in Slovakia is more complex.

## Same numbers, different information environment

While 50% of both Czechs and Slovaks trust standard media, and 73% believe that their media are either relatively or completely free, the information environments in these two countries are different. Attempts to control the largest media<sup>47</sup>, the legitimisation of disinformation outlets<sup>48</sup>, and the refusal to engage with standard mainstream media<sup>49</sup> may have fostered a perception among consumers of disinformation outlets that their "alternative" media are "finally" free<sup>50</sup>.

"Some actions that have resulted in regaining control over Polish public media have faced heavy criticism from experts as illegal. This crisis is, in fact, still ongoing, with the public broadcaster's legal status being questionable. Although Polish public media continue to operate, they are currently in a state of liquidation. This situation undoubtedly undermines trust."

**Pawel Terpilowski,**  
Demagog Poland

"Slovak society is fighting for the political independence of the public broadcaster, as the newly elected government announced plans to restructure it, effectively turning the media into tools of government influence. The government is also attempting to influence the most-watched private TV channel. Measures have already been implemented, and pressure has been exerted to diminish its coverage and criticism of domestic politics."

**Katarina Klingová,**  
GLOBSEC

# Trust matters

Media independence and trust correlate negatively with respondents' belief in disinformation narratives about Ukraine and their stance on Ukraine's EU and NATO membership. On average, 61% of CEE respondents believed Russia was responsible for the war. This perception rose to 71% and 70% among those who trust mainstream media and believe it to be completely free. Similarly, while 37% of respondents across the CEE region supported EU and NATO membership for Ukraine,

this figure increased to 47% among those who perceived the standard media as completely free. In Estonia, Czechia, and Lithuania, the impact of perceived media independence on respondents' support for EU and NATO enlargement by Ukraine exceeded 20 percentage points.

Regarding the question of responsibility for the war, both trust in and the perception of media freedom were aligned with identifying Russia as the primary aggressor. However, when it

comes to Ukraine's EU and NATO membership, the correlation is stronger among those who believe that standard mainstream media are completely free. In essence, if respondents believed that standard mainstream media in their country were completely free, they were more likely to support Ukraine becoming a member of the EU and NATO.



**In Hungary, the more respondents trust standard mainstream media in their country, the less they are inclined to support Ukraine's EU and NATO membership.**

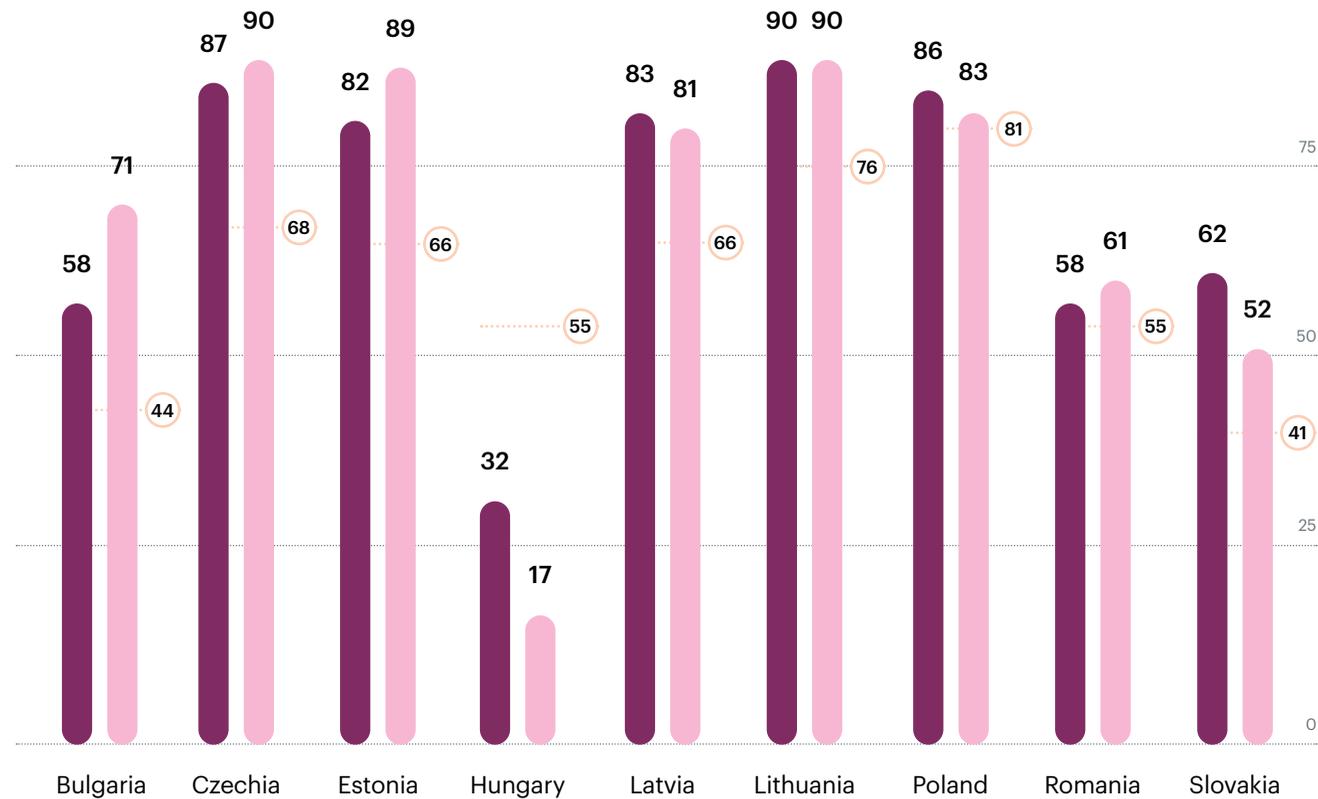
## Hungary a regional exception

The consumption of state-controlled media significantly influences perceptions in Hungary. When Hungarians express distrust towards standard mainstream media, many of which are government-controlled, or do not regard the media as completely free, a greater

number of respondents are likely to perceive Russia as an aggressor and invader of Ukraine. Consequently, these respondents also show higher levels of support for Ukraine's membership in the EU and NATO.

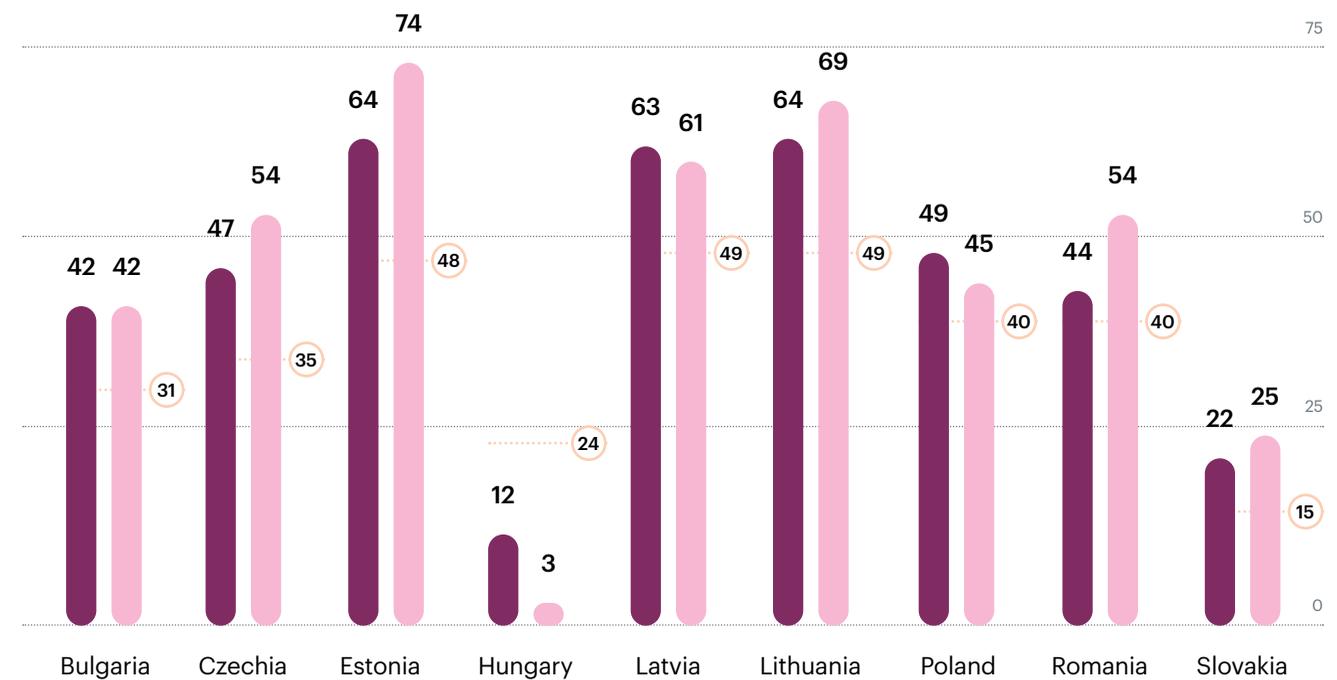
### Those who believe that Russia is primarily responsible for the war in Ukraine (%)

- if respondents completely or rather trust standard mainstream media
- if respondents perceive media to be completely free
- average perception



### Those who believe that Ukraine should become a member of the EU and NATO (%)

- if respondents completely or rather trust standard mainstream media
- if respondents perceive media to be completely free
- average perception





**64%**  
of CEE  
respondents  
agree that  
the work of  
non-profit  
organisations  
is important for  
the functioning  
of democratic  
society.

**07**

# Targets of smear campaigns

Disinformation and smear campaigns targeting non-governmental organisations (NGOs), migrants, and LGBTI+ people have become increasingly common in many countries, whether during pre-election periods or beyond. NGOs are often branded as foreign agents<sup>51</sup> or accused of being funded by the West<sup>52</sup>, casting doubt on their integrity and objectives. LGBTI+ people are frequently depicted as representing an “ideology” or “agenda”<sup>53</sup> that fuels dehumanisation and discrimination. Migrants, especially those from non-European countries, are often being portrayed as economic opportunists<sup>54</sup> or cultural intruders<sup>55</sup>.

The degree of trust with hateful and disinformation narratives differs across CEE countries and is shaped by historical, cultural, and political contexts. The impact of the latter, however, should not be overstated, as evidenced by varying responses from countries where nationalistic populists either were or still are in power. The following pages offer insights into the level of agreement with the most prevalent disinformation narratives, as well as the potential counter-narratives.

# NGOs proving their stance

The majority of respondents in each polled country believe that NGOs are an essential part of a democratic society's functioning, presenting a potent counter-narrative to smear campaigns. While in democratic countries, these organisations collaborate with governments to enhance societal functioning, this model does not apply to all CEE countries, particularly Hungary and Slovakia, where NGOs are consistently demonised by multiple political leaders.

In Hungary, however, government narratives against NGOs have not taken root, with smear campaigns seemingly having the opposite effect on society. Over the past five years, attitudes towards NGOs have shifted in Bulgaria, Poland, and Slovakia, with the perception of their importance increasing in Bulgaria but decreasing in the latter two.

One prevalent narrative in smear campaigns against NGOs is the accusation of "foreign

agents", typically employed by nationalist forces to portray NGOs as enemies of the state. This narrative gained traction in the 2010s following the introduction of "foreign agent" regulations in Russia<sup>56</sup>, inspiring similar proposals across CEE, with, so far, only Hungary implementing them in the EU space<sup>57</sup>. The belief in the "foreign agent" narrative negatively correlates with recognition of NGOs' importance for democracy, except in Romania.

## Those who agree with the following statements: (%)

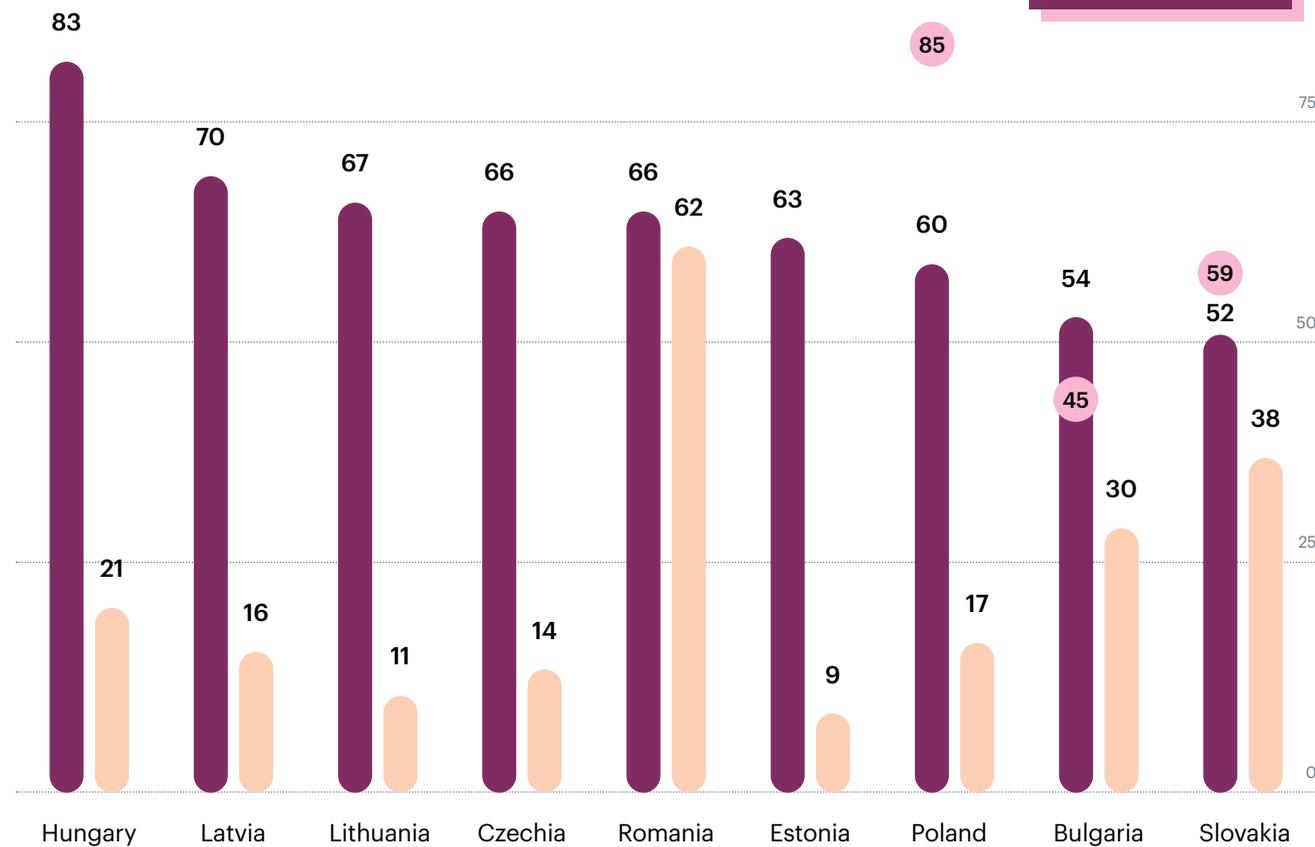
The work of non-profit organisations (NGOs) is important for the functioning of a democratic society.

● 2024 ● 2019

Non-profit organisations are foreign agents.

● 2024

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



"The Hungarian ruling party's anti-NGO narrative has generally found favour among their electoral base and the far-right, while opposition voters have likely been more inclined to reject it. This result is presumably because, despite a years-long campaign, no evidence of wrongdoing by Hungarian NGOs has ever been presented."

♥️ Patrik Szicherle, GLOBSEC

"For most watchdog or good governance NGOs, almost no domestic donors exist, with the main funding sources being international or European organisations. Politicians or interest groups critical of NGOs may spread narratives portraying them as unpatriotic or beholden to foreign interests, rhetoric that has been promoted through legislative initiatives over the last ten years aiming to 'stop foreign interference through NGOs'."

♥️ Elena Calistru, Funky Citizens

"The main narratives surrounding Slovak NGOs include accusations of manipulating public perceptions, accepting funds from George Soros, and acting as tools of the West to undermine democratically-elected leaders by orchestrating colour revolutions. Slovak NGOs are facing backlash from disinformation actors and top political officials, becoming a focal point particularly before elections."

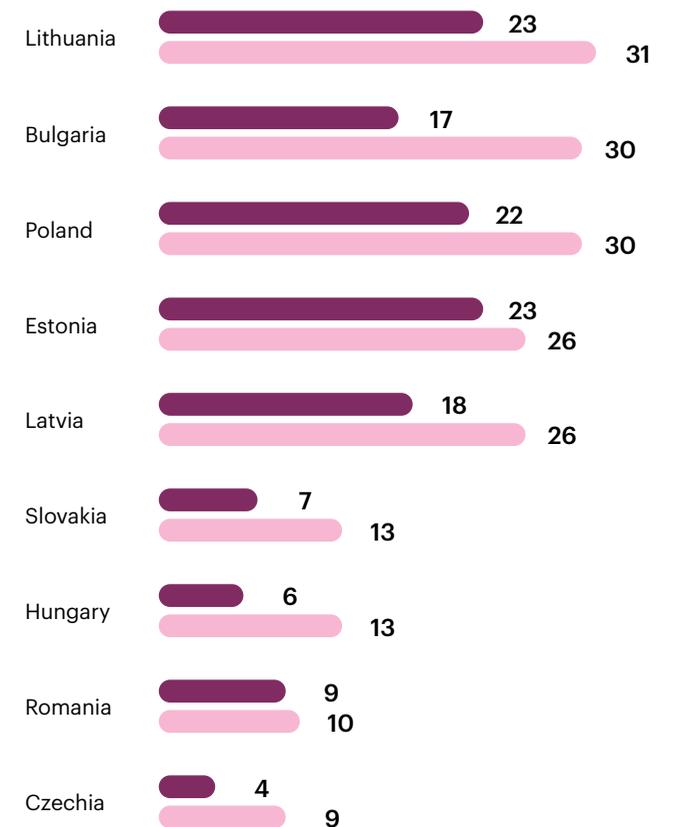
♥️ Viktoria Musilová, GLOBSEC

# NGO uncertainties

In 5 of 9 countries, approximately a fifth to a quarter of respondents were unable to answer the question regarding the importance of NGOs to democracy. This indicates a general lack of understanding about the operations and functions of NGOs, as well as their invaluable contributions to democratic systems. This lack of awareness stems from insufficient public discourse or education on the subject, coupled with limited exposure to diverse viewpoints or discussions surrounding NGOs.

## Those who did not know how to respond to the following statements: (%)

- The work of non-profit organisations (NGOs) is important for the functioning of a democratic society.
- Non-profit organisations are foreign agents.

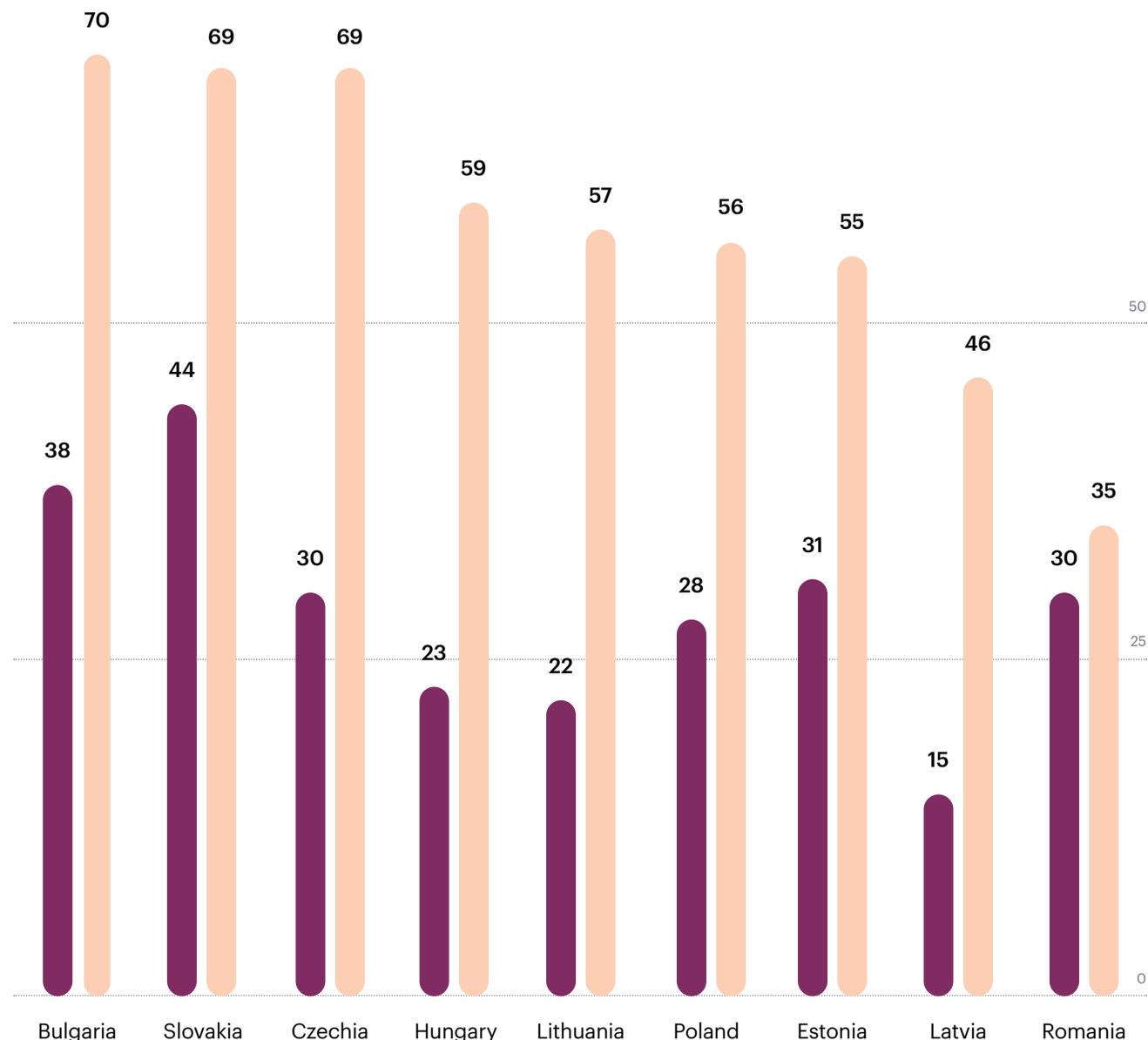


# Migrants: Reluctance beyond Europe's borders

Some people claim that there are certain groups of people, countries or ideas that threaten our own identity and values. Do you personally think any of the following groups, countries or ideas threaten your identity and values or not? (%)

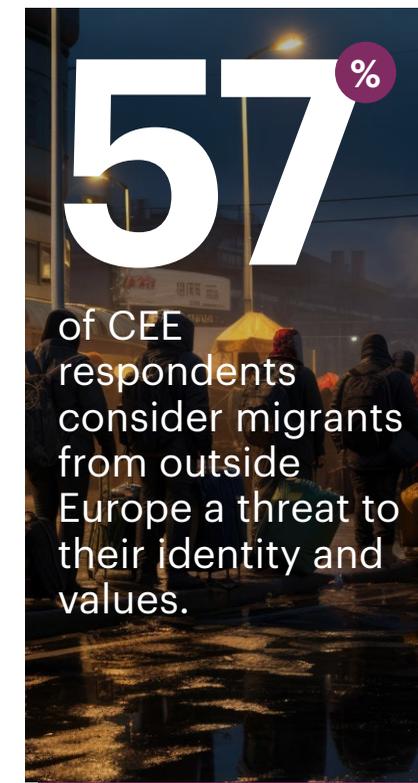
Yes, they threaten

● Migrants coming from Ukraine ● Migrants coming from other countries outside of Europe



As highlighted in the chapter on Ukraine, migrants from outside Europe are perceived as a greater threat than those from Ukraine following the full-scale invasion. In 7 of 9 countries, over half of the respondents view migrants from outside Europe as a threat to their identity and values.

This perception may be attributed to the relatively homogeneous nature of the CEE region, which lacks diversity in terms of ethnicity and religion. Narratives designed to stoke fears about migration, which began to proliferate mainly in the early 2010s during the EU migration crisis, typically depicted immigrants and refugees with different skin colours and religions<sup>58</sup> as perpetrators of violent crimes against residents, capitalising on deep-seated xenophobia<sup>59</sup>. Since then, the issue of immigration has remained politicised, particularly in the run-up to elections, and continues to shape public opinion.



## Turning away from economic migrants

The counter-narrative that tries to highlight the necessity of migration due to workforce shortages does not seem to resonate with CEE respondents, except in Romania, where the acceptance of migrants is above average. These findings further underscore the politicisation of migration and the absence of data-driven, rational public discussions that explain the dynamics of migration across the region. This overlooks the reality that certain skilled positions require expertise that may no longer be available within the local population.

“This data can largely be attributed to the repetitive messaging from parties like ANO and Freedom and Direct Democracy (SPD), which have significant influence, particularly since the onset of the conflict in Ukraine. These parties consistently emphasise that migrants impose a substantial burden on the Czech social welfare system, insurance agencies, and so forth, implying that they deprive Czech citizens of benefits and contribute negatively to the economy.”

**Kristína Šefčíková,**  
Prague Security  
Studies Institute

Our country needs migrants from other countries to cover for the lack of workforce in various economic areas. (%)

● Agree



# Region divided over the LGBTI+ rights

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

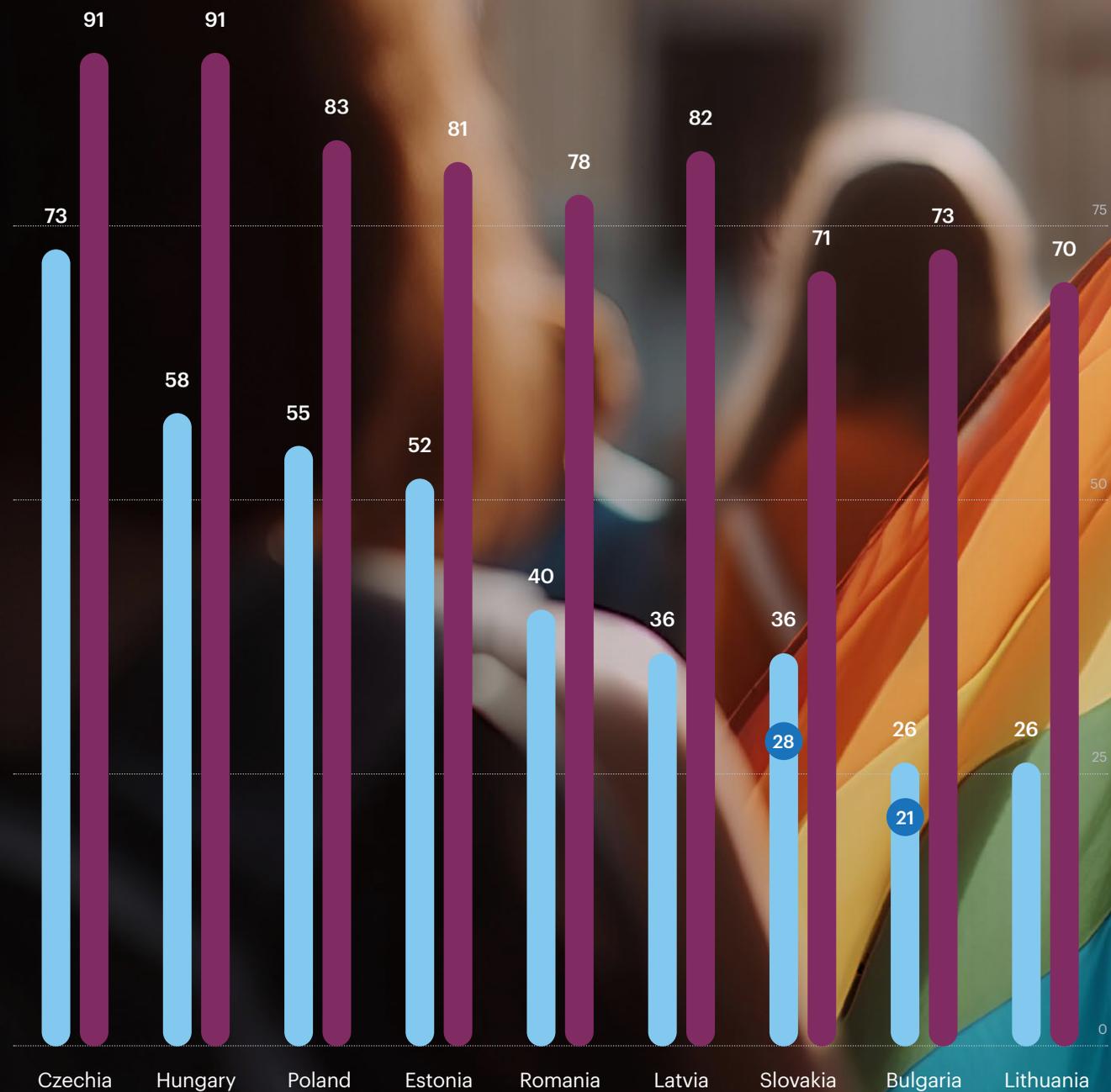
## Those who agree that... (%)

Rights of the LGBTI+ community (such as the right to marriage) should be guaranteed.

● 2024 ● 2023

Respect and tolerance towards each other, no matter the sexual orientation or colour of the skin is important for our society.

● 2024



While on average 80% of CEE respondents agree that respect and tolerance towards each other, regardless of sexual orientation, are important for their society, attitudes towards the practical implementation of these principles in the form of equal rights vary significantly. With LGBTI+ people representing a minority in each CEE country, the region struggles with a discrepancy between tolerance and the application of equal rights in practice.

The support for the rights of LGBTI+ people has remained relatively stable across the region compared to the previous year, with minor changes observed in Slovakia and Bulgaria. However, the level of support varies widely among the countries. From an overwhelming majority in Czechia to merely a quarter of respondents in Bulgaria and Lithuania, the support for LGBTI+ rights marks one of the questions with the largest perceptual differences across CEE.

Despite only slight majority approval, Estonia has enacted legislation allowing same-sex marriages since January 2024 as the first post-Soviet country.<sup>60</sup> While Czechia allowed same-sex couples to register their partnerships as early as 2006, the country has yet to adopt legislation permitting marriage or adoption for LGBTI+ individuals<sup>61</sup>. Among the countries analysed, four legally recognise same-sex unions: Czechia, Estonia, Hungary and Latvia<sup>62</sup>.

**The lowest support for the LGBTI+ people is observed in Bulgaria and Lithuania.**

“Lithuanian society tends to be more accepting of traditional values linked to marriage between a man and a woman. Thus, the question of tolerance towards individuals’ sexual orientation primarily revolves around the inclination to validate gender-neutral partnerships rather than democracy as a system.”

**Ieva Gajauskaitė,**  
Military Academy of Lithuania



08

# AI: Stepping into the spotlight

AI has transcended its origins as a niche specialty among IT enthusiasts to occupy the spotlight in public discourse by 2023. OpenAI's ChatGPT has been instrumental in this shift, showcasing AI's capabilities and limitations while highlighting its ubiquitous impact on daily life<sup>63</sup>. The potential of AI to streamline tasks, especially in sectors like healthcare and production, has been widely acknowledged, although there are also concerns about its implications for job displacement on a grand scale. Consequently, AI has emerged as a key topic due to its undeniable influence across industries, its potential to

**47%**  
of CEE  
respondents  
feel pessimistic  
about the future  
with AI.

transform information environments, and its impact on citizens' information consumption habits, which could significantly affect democracies.

In response to AI's ascendancy, there has been a concerted, multisectoral call for regulation. The EU has introduced the AI Act, celebrated as the world's first comprehensive AI legislation<sup>64</sup>. It outlines responsibilities for AI creators and users according to the associated risk levels and specifies prohibitions, including behaviour manipulation, social scoring, and the use of real-time remote biometric identification techniques like facial recognition. In the United States, notable Senate hearings and an executive order by President Biden have introduced the country's most extensive AI regulations and guidelines, focusing on safety and security<sup>65</sup>. Conversely, some nations, including the United Kingdom, have chosen not to regulate AI<sup>66</sup>.

Survey data from the CEE region reveals that 47% of respondents are pessimistic about the potential impact of AI on their or future generations' lives. Closer analysis identifies three distinct groups based on their sentiments towards AI. The first group, consisting of Hungary, Estonia, Latvia, and Lithuania, shows a nearly even split between optimism and pessimism about AI, with a notable portion of the population in some countries, especially Lithuania, remaining undecided. The second group, including Bulgaria, Czechia, Poland, and Slovakia, features a higher percentage of respondents feeling negative about AI and fewer undecided individuals. The third group comprises Romania alone, where 57% of respondents are optimistic about AI, setting it apart in the region.

"AI is viewed with great optimism in Romania, attributed to the country's flourishing IT sector, rich in highly skilled software development and engineering professionals. This enthusiasm likely derives from AI's potential to revolutionize information access, automate daily tasks, and generate high-tech employment opportunities, possibly counteracting brain drain. Additionally, non-governmental organizations play a crucial role in promoting digital literacy and enhancing AI awareness within communities."

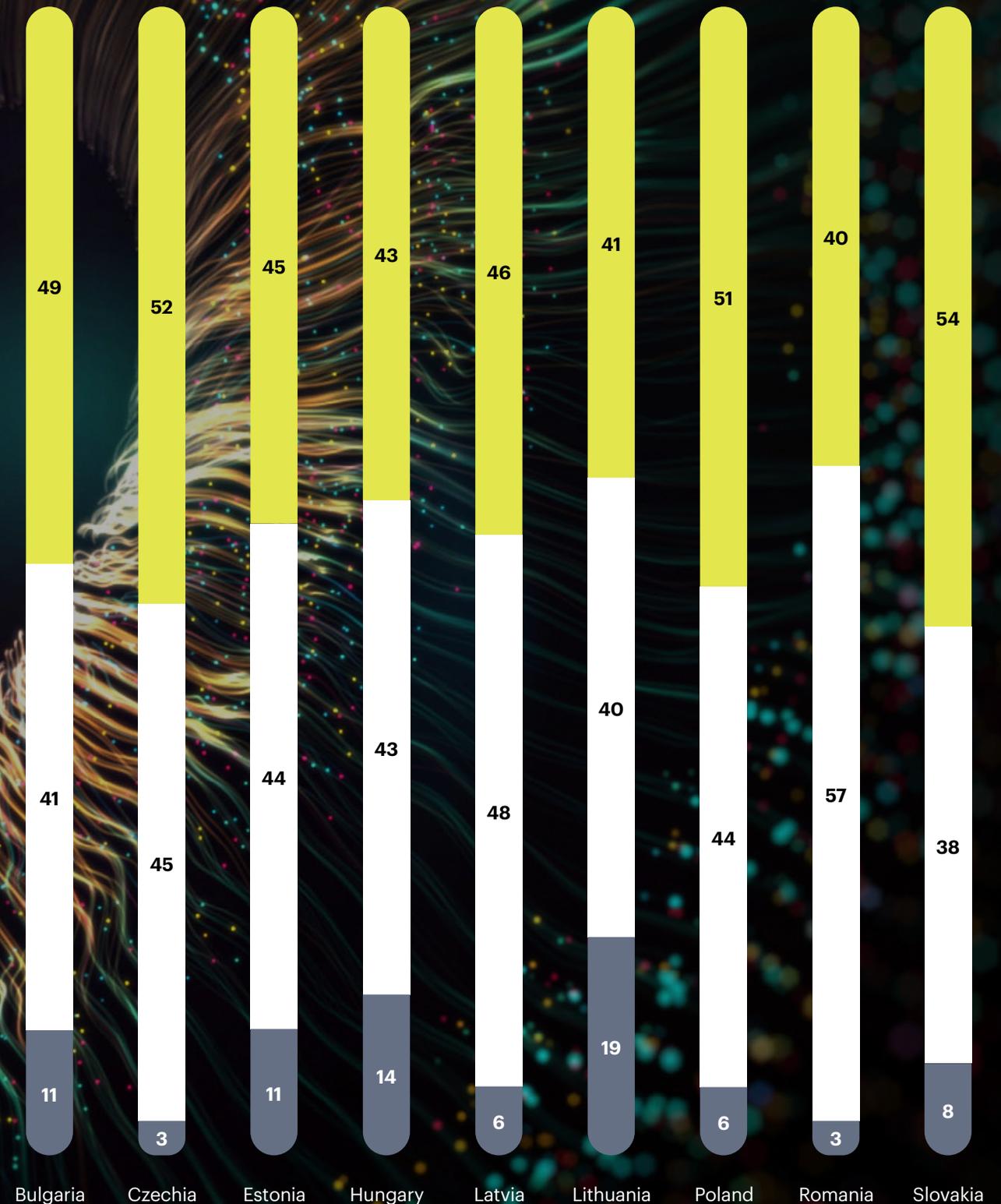
 **Matei Vrabie,**  
Funky Citizens

**57%**  
of respondents in Romania are optimistic about the future with AI.

People's pessimism about AI may arise from a range of factors, a considerable portion of which could be attributed to a lack of understanding. When individuals do not fully comprehend AI technology and its implications, they may feel uncertain or harbour misconceptions about its capabilities. Given that AI is progressively integrating into our lives and future, investing in education and fostering open discussions about the challenges and opportunities presented by AI will be essential in addressing these concerns.

### When thinking about the potential impact of artificial intelligence on your life or the lives of next generation, to what extent do you feel optimistic or pessimistic? (%)

● Pessimistic ● Optimistic ● Do not know (not read)



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## Methodology

The outcomes and findings of this report are based on public opinion poll surveys carried out in February-March 2024 on a representative sample of the population in nine countries: Bulgaria, Czechia, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, and Slovakia. The surveys were conducted on a sample of 1,000 respondents per country (9,000 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; thus, some values depicted in graphs might not add up to 100%. To improve the readers' experience, the responses in closed questions with a scale were generalised. For example, a question with the options definitely agree / rather agree / rather disagree

/ definitely disagree were merged to agree / disagree. All numbers shown in the report are in percentages. The results of the report were consulted with experts across the CEE region, whose insights are included in the report within the text or as specific quotes.

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