

**OPEN Neighbourhood —
Communicating for a stronger partnership:
connecting with citizens across the Eastern
Neighbourhood**

June 2017

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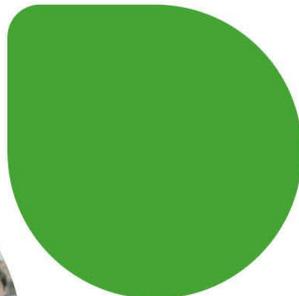
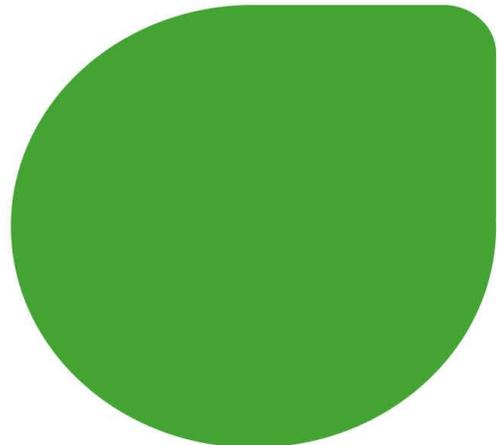
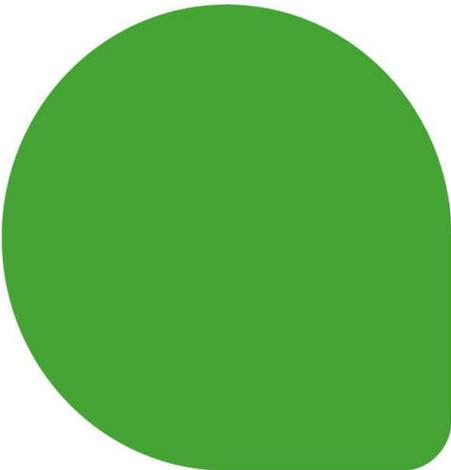


TABLE OF CONTENTS

1. Background	3
2. Research methodology in brief.....	4
3. Survey findings	5
3.1. Executive summary	5
3.2. Perceptions about the European Union	8
3.2.1. General perceptions about the EU.....	8
3.2.2. EU relations with Belarus and awareness of EU financial support	12
3.2.3. Attitudes towards the EU: a snapshot.....	17
3.3. Sources of information on the EU	19
3.3.1. Media usage as sources of information	19
3.3.2. Sources of information about the EU.....	23
3.3.3. Sources of information and attitude towards the EU	27
3.4. View of Belarus's current situation and future expectations	29
3.4.1. View of Belarus's current situation	29
3.4.2. Future expectations.....	31
3.4.3. Views of the country and attitude towards the EU: a snapshot	34
4. Annex.....	35



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*The surveys have been carried out in the six Eastern Partner countries by
ACT LLC and their network partners*

1. Background

Between March and May 2017, a second wave of annual surveys was carried out across the six Eastern Partner countries (Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine). The research was conducted within the framework of the EU-funded “OPEN Neighbourhood — Communicating for a stronger partnership: connecting with citizens across the Eastern Neighbourhood” (‘**EU NEIGHBOURS east**’) project.

The ‘**EU NEIGHBOURS east**’ project aims to increase the understanding of EU support in the Eastern Partner (EaP) countries through improved communication. The **overall objective** of the project is to contribute to the improvement of public perception of the EU, as well as to a better understanding of European policies and their impact through the regional and bilateral EU support and cooperation programmes in Eastern Partner countries.

The project develops information and communication materials, carries out awareness-raising and information campaigns and assesses the perception of the EU and its support through opinion polling and media monitoring.

As part of the opinion polling strategy, the purpose of the annual surveys is to investigate the opinion and the level of information that citizens of the EaP countries have about the EU in general and, in particular, about EU-funded cooperation and development programmes/projects. In order to monitor changes over time, the surveys are being carried out annually from 2016 until 2019.

This document presents the results of the **Annual Survey – 2nd wave** (Spring 2017) conducted in **Belarus**¹ and covers the following broad topics:

- General perceptions about the EU
- Values associated with the EU
- Assessment of EU relations with Belarus
- Awareness of financial support provided by the EU and assessment of its effectiveness
- Sources of information
- Country evaluation and future expectations

Alongside an analysis of the results of the 2nd wave of the survey, this document provides a comparison between the findings of the 2016 and 2017 surveys where relevant.

¹ A similar report has been produced for each EaP country. Additionally, a macro-area report is being prepared that will compare the results across the region.

2. Research methodology in brief

The survey was conducted in April 2017, following the same methodology adopted in the previous round of data collection (Spring 2016). 1,000 face-to-face interviews were carried out and respondents were randomly selected according to the sampling strategy described below. In order to estimate the characteristics of the target population (i.e. general population aged 15 and over and living in the country), the sampling weights were calculated by applying a specifically designed estimation procedure.

Sampling strategy

The survey used a two-stage sample design with settlements as primary sampling units (PSUs) and individuals as secondary units.

In the first stage, the sample was composed of 30 units (cities/towns) and it was stratified by unit size, expressed in terms of population and level of urbanisation, and geographical area. Three groups of settlements² and three areas³ were used for a total of nine strata. Within each stratum, three or four sample units were randomly selected, with the probability of their selection proportional to their size. A compromise between an equal allocation and a proportional allocation was applied in order to distribute the secondary sampling units (1,000 individuals) by strata. In each selected settlement, a minimum of 20 interviews were carried out. The additional interviews that were carried out were distributed proportionally to the PSU's size.

The second-stage sample was also stratified. In this case, gender and age⁴ were considered for a total of six strata. In each selected settlement, secondary sampling units were distributed proportionally among strata.

The individuals to be interviewed were selected randomly, according to the random walk⁵ principle.

Estimation phase

An estimation procedure was carried out in order to estimate the characteristics of the target population from the survey respondents. The technique used for the construction of the survey estimator (i.e. sampling weights) was based on the predictive approach to regression estimator. In particular, a calibration estimator was built based on the general category of model-assisted estimators (Deville and Särndal 1992). The procedure included the computation of a sampling design weight for each sampled respondent by calculating the inclusion probability of both primary and secondary sampling units (i.e. settlements and individuals) and the calibration of the sampling design weights to known population totals. Three new calibration variables (education level, religious faith and mother tongue) were added to those used in the previous wave (settlement size, gender, age, employment status and geographical area) to produce calibrated weights, and therefore to improve the quality of survey findings, as they allowed for a better correction of any selection bias. Nevertheless, it is worth mentioning that the introduction of additional auxiliary variables in the estimation procedure could occasionally explain part of the difference between the estimates of the two years.

² Groups of settlements: 1) Small settlements (less than 20,000 inhabitants); 2) Medium-sized settlements (20,000-150,000 inhabitants); 3) Large settlements (above 150,000 inhabitants).

³ Geographical areas: 1) East (Mogilev, Gomel); 2) Centre (Vitebsk, Minsk city, Minsk region); West (Brest, Grodno).

⁴ Age groups: 1) 15-34 years; 2) 35-54 years; 3) 55 or more years.

⁵ This technique is based on very precise instructions for the interviewers. First, a starting point should be selected for each cluster. Second, it is necessary to define a step. A step can be defined according to the size of the cluster. The third important consideration is the movement route. Each interviewer should have detailed instructions on how to follow the route in rural settlements and urban areas. Each interviewer should begin from the starting point, according to the predefined step size and route, and contact a total predefined number of households.

3. Survey findings

3.1. Executive summary

General perceptions about the EU

- As in 2016, around half of Belarusians have a generally neutral image of the EU, though this figure is up slightly in 2017 compared to the previous year (53% in 2017 vs. 46% in 2016). Meanwhile, the share of those who had a negative perception of the EU has decreased from 13% in 2016 to 6% in 2017.
- For the majority of Belarusians (from those who have heard about and/or know the European Union), the EU is very strongly or fairly strongly associated with freedom of religion and media (82% and 81% respectively), freedom of speech (77%), human rights (75%), economic prosperity and individual freedom (both 74%) and rule of law (70%). The weakest association was observed with regards to the absence of corruption (37%). The most important personal value for the majority appears to be peace, security and stability (cited by 73% of people). Freedom of religion, respect for other cultures and freedom of the media seem to have the lowest importance at a personal level.
- The European Union seems to be the most trusted foreign institution in Belarus: slightly more than half of Belarusians tend to trust the EU, followed by the United Nations (46%) and the Eurasian Economic Union (46%).

EU relations with Belarus and awareness of EU financial support

- 54% of Belarusians (compared to 58% in 2016) describe their country's relationship with the European Union as fairly or very good. Almost one in five citizens were not able to provide an opinion – 11% do not know whether they think relations are good or bad and 8% think there are no relations between Belarus and the EU.
- Similar to the results from 2016, 39% of Belarusians are aware that the EU provides financial support to their country, while the rest of the population is equally split between those who think that the EU does not provide any support (30%) and those who simply do not know (31%).
- Since 2016, the proportion of people believing that the financial support provided by EU is effective has decreased from 56% to 47%. Moreover, the share of those who think that financial support from the EU to Belarus is not very effective has increased from 27% to 43%.
- Only a third of those who are aware of the EU's financial support know about specific EU-funded programmes in Belarus. The most well-known EU-financed programmes are educational programmes (54%), followed by health and medicine (48%) and economic reforms/business promotion and cultural programmes (both 23%).
- Every second person in Belarus considers that the Russian Federation provides more financial support to their country than the EU, while only a third think the same about the International Monetary Fund/World Bank. As in 2016, a significant number of people were not aware of the details of the financial support of different international agencies and answered, "don't know" (between 15 and 30%).

- Half of Belarusians believe that Belarus has benefitted ‘fairly’, and to a lesser extent ‘very much’, from EU support through increased tourism, access to more products and services and improved trade.
- The two areas where most Belarusians felt the EU should play a greater role were economic development (54%) and increased employment opportunities (40%).

Attitudes towards the EU: a snapshot

- Citizens with a positive image of the EU are also more likely to be more positively oriented towards all other indicators compared to the neutrally minded population. In particular, 75% of those who have a positive attitude towards the EU also tend to trust the EU more, compared to less than half of those who are mostly neutral (45%). Differences between the proportions of people with positive and neutral images of the EU vary from 10% to 21% for other indicators, such as how good the relationship between the EU and Belarus is, awareness of the EU’s provision of financial support and effectiveness of EU support.
- The top three values which are strongly associated with the EU by Belarusians with a positive image of the EU are freedom of media (91%), freedom of religion (90%) and freedom of speech (88%). These values are also linked to the EU for people with a neutral image of the EU, although to a slightly lesser extent (78%, 79% and 73% respectively).
- Similarly, those with positive attitudes towards the EU see more benefits for Belarus from the EU, compared to those who are neutrally oriented. The majority believe that the European Union has “very much” or “fairly much” increased access to more products, improved trade and accelerated tourism.

Media usage as sources of information

- Television is the most popular media channel – 28% of Belarusians always watch TV, 41% often and 25% sometimes. The next most commonly used source of information is word of mouth (from neighbours, friends, colleagues, etc.) with 80%, followed by print media (77%).
- Russian language media, be it national or foreign, is the most commonly used media source among Belarusians – 22% of them always follow the country’s media in Russian, 40% use it often and 31% sometimes; as for the foreign media in Russian it is also consumed by 77% of the population with different frequency. The country’s media in the national language is used by only 5% of the population on a regular basis and by 61% in general.

Sources of information about the EU

- 62% of Belarusians said that they had heard about the European Union in the last three months, slightly more than in 2016 (58%). Most of the information they have been exposed to came from television (86%), followed by the internet (36%), word of mouth (21%) and print media (17%).
- The most common attitude towards the representation of the EU in national media is the same as last year – 46% of the population think that the EU is represented in the national media in a rather neutral way, while more people (33%) think the EU is positively represented than negatively (11%).
- Only 10% of Belarusian people search for information on the European Union very frequently or frequently, and the majority of them (68%) never try to access this type of information. Similar to media consumption in general, the most common information source for accessing information on the EU is Russian language media (94%). As for media channels, while TV is the most common channel for receiving any type of information, for active searches for information on EU issues, people prefer the internet over TV (61% and 47% respectively).

- Most people who search for information about the EU rate the information as being user-friendly (very – 25%; fairly – 65%) and accessible (very – 25%; fairly – 61%).

Source of information and attitude towards the EU

- The survey results show that consumption of internet and social media as information sources positively affects attitudes towards the EU. Less than a third (30%) of those who frequently use only traditional media have a positive attitude towards the EU, while this figure goes up among the consumers of internet and social media: 43% of Belarusians who frequently use social media or the internet have a positive image of the EU. In the same way, people who are dependent on traditional media value the effectiveness of the EU's financial support less than those using new technologies to access media. Trust towards the EU is higher among the users of the internet and social media.
- Russian media users tend to have a more positive perception of the European Union and to be aware of its financial support, although non-Russian media consumers consider the EU's financial support to be effective. No major differences are observed between the two groups in terms of trust towards the EU and evaluating its relations with Belarus.

View of Belarus's current situation

- The most trusted institutions in Belarus are the Government and Parliament of the country (50% and 44% respectively). However, Belarusian citizens' level of trust towards these institutions has fallen slightly since 2016. The proportion of people who did not trust regional and local public authorities remains at the same level as in 2016 (47%). Religious authority is trusted by less than half of Belarusian citizens, while with more than 35% of people tend not to trust it.
- Significantly fewer people in 2017 seem to be very or fairly satisfied with the way democracy works in Belarus compared to the previous year (48% vs. 31% in 2017).
- The greatest share of Belarusians (72%) think that gender equality is the one value that applies to Belarus compared to all other values. More than half of the population also believe that the rule of law exists in Belarus (57%). Equality and social justice, and lack of corruption seem to be the least applicable elements in Belarus (cited by 35% and 28% of people respectively).

Future expectations

- Belarusians seem to be generally more optimistic about their own future (51%) than the future of their country (40%).
- The most pressing problems in Belarus are unemployment and low salaries and pensions (61% for both), followed by the economic crisis (47%), low living standards and poverty (41%) and high prices and taxes (36%).

Views of the country and attitude towards the EU

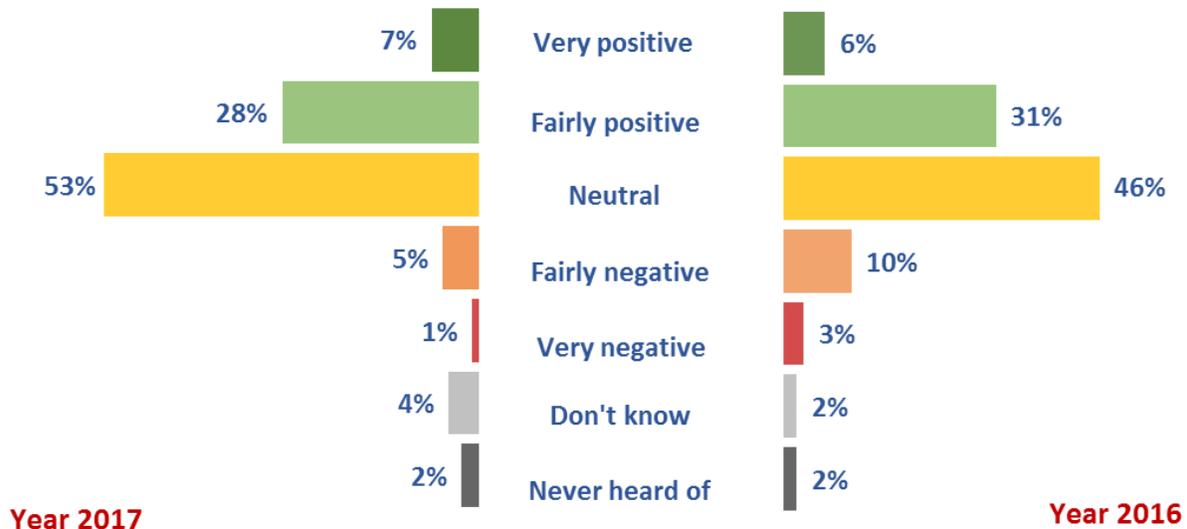
- Interestingly, individuals who have a neutral image of the EU are more likely to be positive about state bodies like the government of Belarus, its parliament, regional and local authorities and political parties; they are also more likely to sympathize with local religious authorities, compared to those with a positive image of the EU, and are more satisfied with the way democracy works in Belarus. The level of personal optimism is higher among people who have a positive view of the EU.
- Almost everyone, regardless of their attitude towards the European Union, indicated the same pressing problems in Belarus, with unemployment and low salaries/pensions at the top of the list.

3.2. Perceptions about the European Union

3.2.1. General perceptions about the EU

The study results showed that, as in 2016, around half of Belarusian citizens have a neutral image of the European Union (53% in 2017 vs. 46% in 2016). The neutral attitude towards the EU seems to have increased slightly in 2017 compared to the previous year (+7%), while the proportion of those with fairly positive or very positive images has remained the same (35% in 2017 vs. 37% in 2016) – see fig. 1. However, the share of citizens with a negative view of the EU decreased from 13% to 6% in 2017. The proportion of people reporting no awareness or opinion about the EU was about the same in both surveys (4% in 2016 vs 6% in 2017).

FIGURE 1 – Do you have a very positive, fairly positive, neutral, fairly negative or very negative image of the European Union? (Q2.1)



Positive attitudes towards the EU are somewhat prevalent among males (37% vs. 32% females) and the middle-aged population bracket (37% among the 35-55 age group vs. 33% among youth and the elderly). Additionally, the attitude of Belarusians towards the EU appears to be related to the level of education: a higher proportion of highly educated people have a positive image of the EU compared to those with medium and low levels of education (45% vs. 32% for low and/or medium levels of education) – see tab. 1. Moreover, residents of medium-sized settlements tend to have a more positive attitude towards the EU compared to those living in smaller or larger areas (40% vs. 34% and 32% respectively). The study did not reveal any notable differences among people with different employment statuses and/or from diverse geographical locations (see tab. 1).

TABLE 1 – Perception of the EU

Q2.1. Do you have a very positive, fairly positive, neutral, fairly negative or very negative image of the European Union?		Positive	Neutral	Negative	Don't know / Never heard	Total
Settlement size	Equal to or more than 150,000 inhabitants	34%	53%	6%	7%	100%
	Between 20,000 and 150,000 inhabitants	40%	48%	7%	5%	100%
	Less than 20,000 inhabitants	32%	55%	6%	7%	100%
Gender	Male	37%	51%	7%	5%	100%
	Female	32%	54%	5%	9%	100%
Age group	15-34 years	33%	57%	4%	6%	100%
	35-54 years	37%	53%	7%	3%	100%
	55 years & above	33%	48%	8%	11%	100%
Education level	Low/medium level	32%	54%	7%	7%	100%
	High level	45%	48%	5%	2%	100%
Employment status	Employed/ Self-employed	35%	56%	5%	4%	100%
	Unemployed or temporarily not working/inactive	33%	48%	7%	12%	100%
Geographical area	East	36%	52%	3%	9%	100%
	North/centre	33%	54%	8%	5%	100%
	West	36%	52%	6%	6%	100%
Total		35%	53%	6%	6%	100%

Most Belarusians (who have heard about and/or know the European Union) very strongly or fairly strongly associate the EU with the following values: freedom of religion and media (82% and 81% respectively), freedom of speech (77%), human rights (75%), economic prosperity and individual freedom (74% for each) and rule of law (70%). Slightly fewer people, but still more than 60%, feel that the EU represents values such as democracy (67%), respect for other cultures (65%) and equality and social justice (62%). Moreover, every second citizen believes that the EU represents peace, security and stability (58%) and honesty and transparency (49%). The weakest association was observed with regards to the absence of corruption (36%). Between 7% and 19% of Belarusians per studied value did not know how to answer the question. The findings are consistent with last year's survey.

TABLE 2 – Values associated with the EU

Q2.3. To what extent does the European Union represent the following values for you?						
	Very strong	Strong	Weak	Very weak	Don't know	Total
Freedom of religion	25%	57%	9%	1%	10%	100%
Freedom of the media	25%	56%	9%	2%	8%	100%
Freedom of speech	17%	60%	12%	2%	9%	100%
Human rights	20%	55%	17%	1%	7%	100%
Economic prosperity	21%	53%	10%	2%	14%	100%
Individual freedom	20%	54%	15%	2%	9%	100%
Rule of law	16%	54%	15%	3%	12%	100%
Democracy	17%	50%	15%	2%	16%	100%
Respect for other cultures	20%	45%	21%	4%	10%	100%
Equality and social justice	16%	46%	25%	3%	10%	100%
Peace, security and stability	17%	41%	28%	6%	8%	100%
Honesty and transparency	9%	40%	31%	3%	17%	100%
Absence of corruption	6%	31%	36%	8%	19%	100%

Percentages refer to Belarusians who have heard about the EU

Figure 2 below compares the values that are strongly associated with the EU with the most important personal values for Belarusians⁶. Study results showed that the majority of Belarusians tend to strongly associate all values with the EU (except for the absence of corruption), while the most important single

⁶ Respondents were asked to choose and rank the three most important personal values from a list of 13 items.

personal value for the majority of Belarusians appears to be **peace, security and stability** (cited by 73% of people). It is important to note that all other values are less than half as important at a personal level compared to peace, security and stability. Human rights, honesty and transparency and individual freedom are important personal values for a third of those asked. Freedom of religion, respect for other cultures and freedom of the media seem to have the lowest importance at a personal level (the proportion of respondents varies from 3 to 5 per cent per value).

FIGURE 2 – Values strongly or very strongly associated with the EU (Q2.3) & three most important personal values (Q4.7)

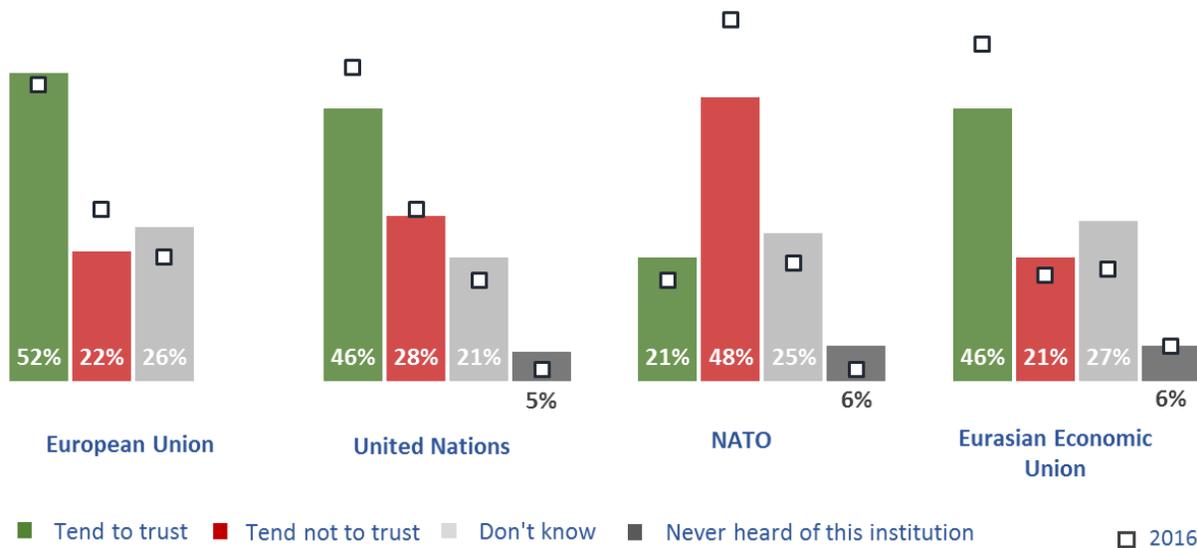


Percentages refer to Belarusians who have heard about the EU

The perception of the EU was also assessed through an open-ended question where people were asked to name the first issues that came to their minds when thinking of the EU. As expected, positive associations mostly revolved around European integration (34%), economic prosperity & high standard of living (20%) and travelling/tourism (12%). As for the negative issues associated with the EU, chaos and instability was named by 5% of the Belarus people, the same number highlighted the migration issue and 4% declared they just do not believe in/support the EU. It should be noted that one fifth of citizens did not know how to answer, either because it was too difficult to answer or they had nothing to say.

The European Union seems to be the most trusted foreign institution in Belarus: slightly more than half of Belarusians (52%) tend to trust the EU. The United Nations and the Eurasian Economic Union are the second most trusted institutions (both 46%), although the level of trust has decreased since the previous wave (from 53% and 57% respectively). Only one fifth of Belarusians reported trust towards NATO (21%) (fig. 3).

FIGURE 3 – Trust towards different institutions (Q2.11)



Percentages refer to Belarusians who have heard about the EU

The level of trust in the European Union is influenced by the level of education: 62% of highly-educated Belarusians tend to trust the EU, compared to 49% of people with medium and low levels of education (tab 3). The European Union is particularly trusted by people residing in the west of the country (60%), by male citizens (55%), and by individuals of working age (15-34 years – 56%, 35-54 years – 53%, 55 years & above – 46%), compared to other sub-groups.

TABLE 3 – Trust towards the European Union

Q2.11. I would like to ask you a question about how much trust you have in the EU		Tend to trust	Tend not to trust	Don't know or never heard of the EU	Total
The European Union					
Settlement size	Equal to or more than 150,000 inhabitants	48%	25%	27%	100%
	Between 20,000 -and150,000 inhabitants	56%	21%	23%	100%
	Less than 20,000 inhabitants	54%	18%	28%	100%
Gender	Male	55%	22%	23%	100%
	Female	49%	21%	30%	100%
Age group	15-34 years	56%	15%	29%	100%
	35-54 years	53%	23%	24%	100%
	55 years & above	46%	27%	27%	100%
Education level	Low/medium level	49%	22%	29%	100%
	High level	62%	19%	19%	100%
Employment status	Employed/ Self-employed	54%	21%	25%	100%
	Unemployed or temporarily not working/inactive	49%	22%	29%	100%
Geographical area	East	45%	14%	41%	100%
	North/centre	51%	25%	24%	100%
	West	60%	23%	17%	100%
Total		52%	22%	26%	100%

Percentages refer to Belarusians who have heard about the EU

3.2.2. EU relations with Belarus and awareness of EU financial support

Positive perceptions of Belarus' relations with the EU seem to have slightly declined compared to last year: 54% of Belarusians (compared to 58% in 2016) describe their country's relationship with the European Union as fairly or very good (fig. 4). Almost one in five citizens were not able to provide either a positive or negative answer to this question – 11% do not know whether relations are good or bad and 8% think there are no relations between Belarus and the EU.

FIGURE 4 – In general, how would you describe the relations that the European Union has with your country? (Q2.4)



Percentages refer to Belarusians who have heard about the EU

The opinion of relations between Belarus and the EU tends to vary by employment status: the share of those who deem relations with the EU to be good is higher among employed people (57% versus 49%). Alongside this, people from small settlements (60%) and those living in the Eastern part of the country (62%) tend to have a more positive opinion in comparison to other sub-groups in the same categories.

TABLE 4 – Relations between the EU and Belarus

Q2.4. In general, how would you describe the relations that the European Union has with Belarus?		Good	Bad	Don't know/No relations	Total
Settlement size	Equal to or more than 150,000 inhabitants	53%	30%	17%	100%
	Between 20,000 and 150,000 inhabitants	44%	30%	26%	100%
	Less than 20,000 inhabitants	60%	23%	17%	100%
Gender	Male	53%	29%	18%	100%
	Female	54%	26%	20%	100%
Age group	15-34 years	52%	32%	16%	100%
	35-54 years	54%	27%	19%	100%
	55 years & above	56%	23%	21%	100%
Education level	Low/medium level	54%	26%	20%	100%
	High level	58%	29%	13%	100%
Employment status	Employed/ Self-employed	57%	28%	15%	100%
	Unemployed or temporarily not working/inactive	49%	27%	24%	100%
Geographical area	East	62%	22%	16%	100%
	North/centre	48%	31%	21%	100%
	West	56%	25%	19%	100%
Total		54%	27%	19%	100%

Percentages refer to Belarusians who have heard about the EU

39% of Belarusians are aware that the EU provides financial support to their country (tab. 5). The number of people who are aware of EU financial support to Belarus is higher among men (42%), youngsters (43%), more educated individuals (54%), and people residing in the western part of the country (46%). It should also be highlighted that the share of Belarusians who do not know whether the EU provides support to their country remains significant (31%), accounting for nearly two out of five medium-sized city residents and unemployed people (38% and 37% respectively).

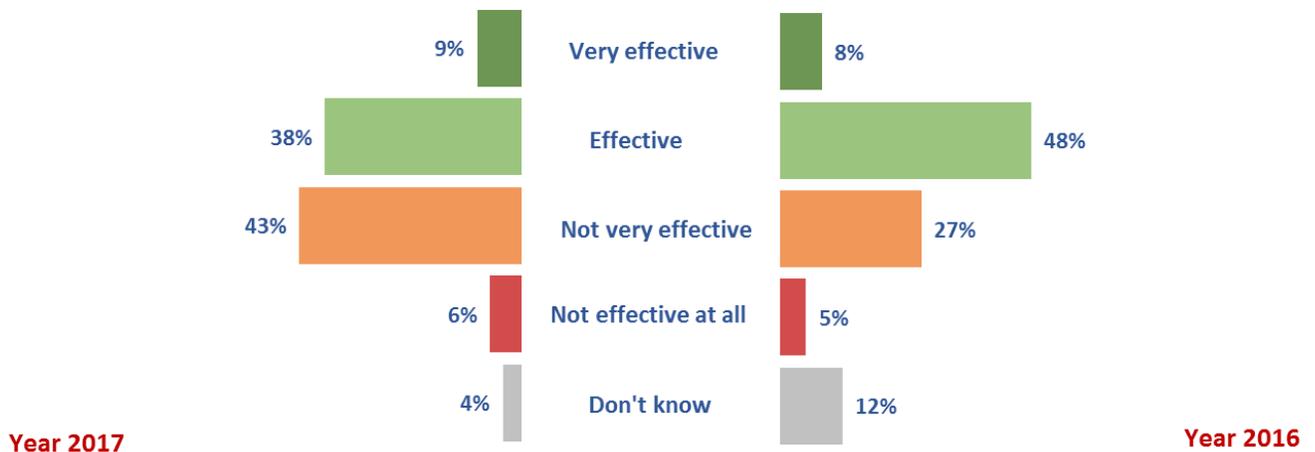
TABLE 5 – Provision of financial support by the EU

Q2.5. As far as you know, does the European Union provide Belarus with financial support?		Yes	No	Don't know	Total
Settlement size	Equal to or more than 150,000 inhabitants	40%	35%	25%	100%
	Between 20,000 and 150,000 inhabitants	37%	25%	38%	100%
	Less than 20,000 inhabitants	39%	27%	34%	100%
Gender	Male	42%	32%	26%	100%
	Female	36%	29%	35%	100%
Age group	15-34 years	43%	23%	34%	100%
	35-54 years	37%	33%	30%	100%
	55 years & above	37%	34%	29%	100%
Education level	Low/medium level	36%	31%	33%	100%
	High level	54%	31%	15%	100%
Employment status	Employed/ Self-employed	40%	34%	26%	100%
	Unemployed or temporarily not working/inactive	37%	26%	37%	100%
Geographical area	East	39%	32%	29%	100%
	North/centre	35%	32%	33%	100%
	West	46%	25%	29%	100%
Total		39%	30%	31%	100%

Percentages refer to Belarusians who have heard about the EU

As shown in the figure below (fig. 5), almost half the population feel the financial support provided by the EU is not effective (not very effective – 43%, not effective at all – 6%), and it is noteworthy that there has been a significant increase in those sharing this opinion. The share of people believing that the financial support provided by the EU is effective has decreased from 56% to 48% compared to 2016; moreover, the proportion of people who were uncertain about this issue has decreased sharply, from 12% last year to 4% in 2017.

FIGURE 5 – How effective do you think the support has been? (Q2.5.1)



Percentages refer to Belarusians who were aware of the EU's financial support

The highest percentage of people who believe the financial support provided by the EU is effective is to be found among those living in medium-sized settlements (67%), in the west of the country (60%), among women (52%), the younger generation (57%) and unemployed individuals (54%) (tab. 6). Perception of the effectiveness of EU financial support seems to be dramatically different across different regions of the country: as mentioned above, 69% of residents of the western regions of the country believe that EU financial support is effective, as do 54% of residents of eastern regions, while a huge difference is observed with the residents of the central part of the country – the share of those who feel EU support is effective in these areas is almost two times smaller, at just 35%. More generally, the groups most sceptical about the effectiveness of EU financial support appear to be among those with higher levels of education (60%) and residents of the north/centre (62%).

TABLE 6 – Effectiveness of the support

Q2.5.1. How effective do you think the support has been?		Effective	Not effective	Don't know	Total
Settlement size	Equal to or more than 150,000 inhabitants	43%	52%	5%	100%
	Between 20,000 and 150,000 inhabitants	67%	30%	3%	100%
	Less than 20,000 inhabitants	43%	55%	2%	100%
Gender	Male	42%	53%	5%	100%
	Female	52%	45%	3%	100%
Age group	15-34 years	57%	41%	2%	100%
	35-54 years	40%	56%	4%	100%
	55 years & above	44%	50%	6%	100%
Education level	Low/medium level	51%	46%	3%	100%
	High level	34%	60%	6%	100%
Employment status	Employed/ Self-employed	43%	53%	4%	100%
	Unemployed or temporarily not working/inactive	54%	44%	2%	100%
Geographical area	East	54%	40%	6%	100%
	North/centre	35%	62%	3%	100%
	West	60%	37%	3%	100%
Total		47%	49%	4%	100%

Percentages refer to Belarusians who were aware of the EU's financial support

Only about a third of citizens who are aware of the EU's financial support know about specific EU-funded programmes in Belarus (tab. 7). The study results showed that the greatest proportion of people who are knowledgeable about EU-funded programmes in Belarus is to be found among educated people (46%).

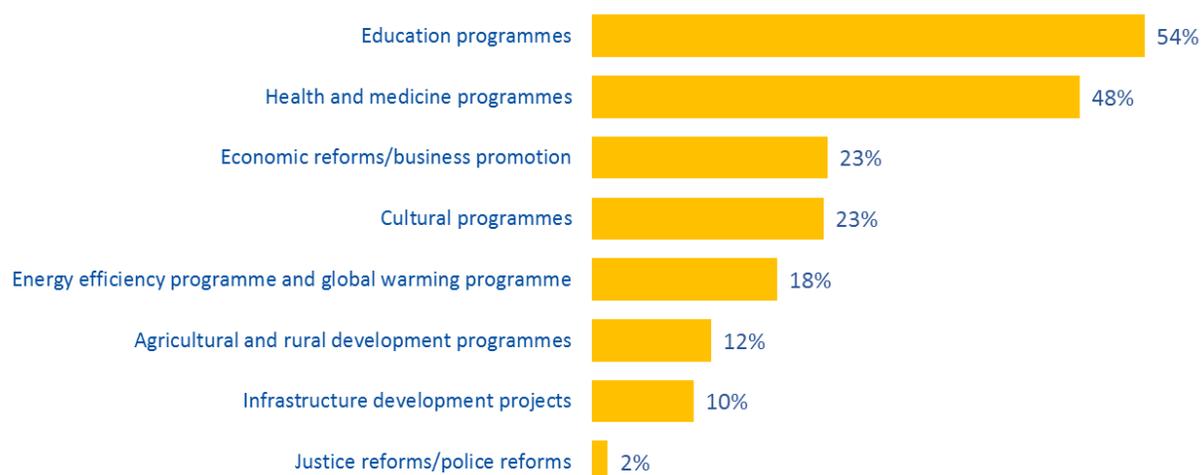
TABLE 7 – Programmes financed by the EU

Q2.6. Do you know of any specific programmes financed by the European Union in Belarus?		Yes	No	Total
Settlement size	Equal to or more than 150,000 inhabitants	25%	75%	100%
	Between 20,000 and 150,000 inhabitants	39%	61%	100%
	Less than 20,000 inhabitants	34%	66%	100%
Gender	Male	31%	69%	100%
	Female	30%	70%	100%
Age group	15-34 years	30%	70%	100%
	35-54 years	39%	61%	100%
	55 years & above	23%	77%	100%
Education level	Low/medium level	25%	75%	100%
	High level	46%	54%	100%
Employment status	Employed/ Self-employed	33%	67%	100%
	Unemployed or temporarily not working/inactive	27%	73%	100%
Geographical area	East	32%	68%	100%
	North/centre	39%	61%	100%
	West	17%	83%	100%
Total		31%	69%	100%

Percentages refer to Belarusians who were aware of the EU's financial support

The most well-known EU-funded programmes in Belarus are educational programmes (54%), followed by health and medicine (48%) and economic reforms/business promotion and cultural programmes (23% each) (fig. 6). The proportion of people who are aware of programmes on energy efficiency and global warming, agricultural and rural and infrastructure development programmes varies between 10 and 18%. Very few people in Belarus seem to be aware of justice reform/police reform programmes.

As for personal involvement with an EU-funded project in the past twelve months, only 3% of Belarusians were personally involved in an EU-funded project, mainly as a programme participant or volunteer.

FIGURE 6 – Which specific programme(s) do you know? (Q2.6.1, multiple answers possible)

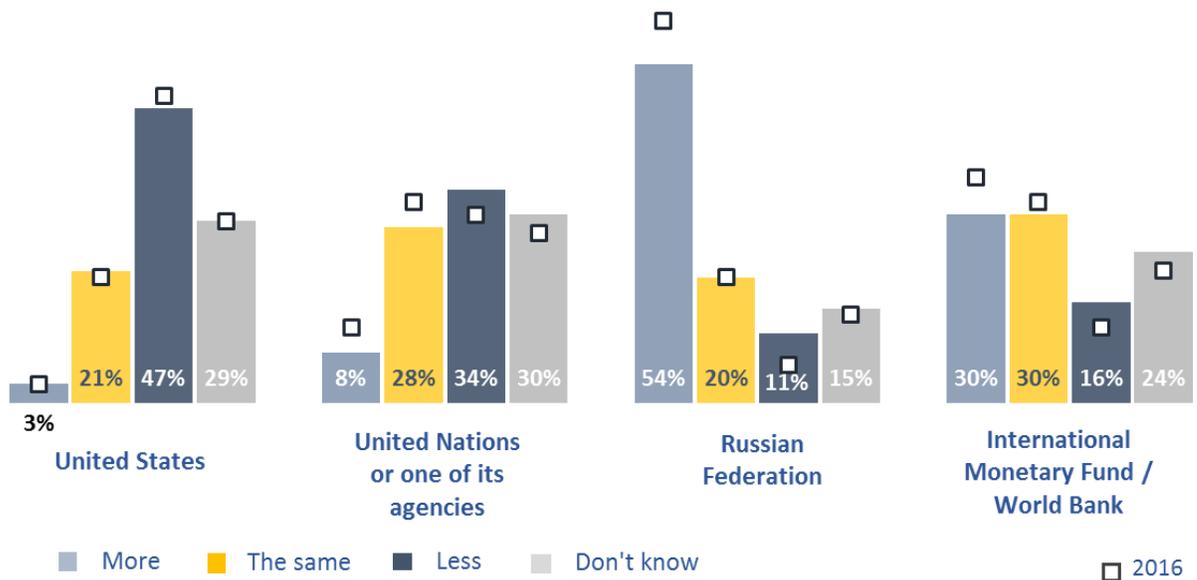
Percentages refer to Belarusians who were aware of the EU's financial support

The survey suggests that one in two people in Belarus believe that the Russian Federation provides more financial support to their country than the EU, while only 30% think the International Monetary Fund/World Bank provide more (fig. 7).

Almost half of those asked think the EU provides more support than the United States (47%), and nearly a third believe the country receives more financial support from the EU than from the UN or one of its agencies. It is worth noting that the number of people who believe that Russia or the International Monetary Fund/World Bank provide the most support has decreased since 2016 (from 61% to 54% for Russia, and from 36% to 30% for the IMF).

As in 2016, a significant number of people were not aware of the details of the financial support of different international agencies and answered “don’t know” (US – 29%; UN – 30%; RF – 15%; IMF/WB – 24%).

FIGURE 7 – As far as you know, for each of the following international institutions would you say that it provides more, the same, or less financial support to your country than the European Union? (Q2.7)



Percentages refer to Belarusians who have heard about the EU

The main cited benefits of EU financial support include the increase in tourism (53%), access to more products and services (53%), improved trade (53%) and better education (42%)⁷. Moreover, about one third of the population acknowledged the benefit from the EU’s support in terms of attaining higher quality healthcare and improved democracy in the country (34% each).

It is notable that EU is less associated with a decrease in corruption (11%). However, corruption is not one of Belarusians’ priorities (only 12% feel the EU should do more in this area), and they would rather have greater support for economic development (54%) and employment (40%)⁸.

Another area in which people think the country could do with greater EU support is improved trade (34%).

⁷ More details are provided in Annex, Table A1.

⁸ Respondents were asked to name and rank the three most important areas in which the EU should play a greater role. See Appendix Table A2 for more details.

FIGURE 8 – Areas that have benefitted very much or fairly from EU support (Q2.8) & three most important areas that require greater participation from the EU (Q2.9)



Percentages refer to Belarusians who have heard about the EU

3.2.3. Attitudes towards the EU: a snapshot

In this section, the attitude of Belarusians towards the EU has been analysed according to two main profiles: individuals that have a positive attitude towards the EU and those who are mostly neutral.⁹ Four indicators were considered: level of trust, relationship between Belarus and the EU, awareness of EU financial support, and the effectiveness of EU support.

It is worth noting that people with a positive image of the EU are also more likely to be more positively oriented towards all four indicators, compared to the neutrally-minded population (fig. 9). In particular, 75% of those who have a positive attitude towards the EU also tend to trust the EU more, compared to less than half of those who are mostly neutral (45%). Moreover, the difference in attitude between the people with positive and neutral images of the EU is at least 10% for the rest of the three indicators, such as good relations between the EU and Belarus, awareness of EU provision of financial support and effectiveness of EU support (differences vary from 10% to 21% for different indicators)¹⁰.

⁹ Individuals that were mostly negatively oriented were excluded from the comparison, as their number was too small for the results to be statistically significant.

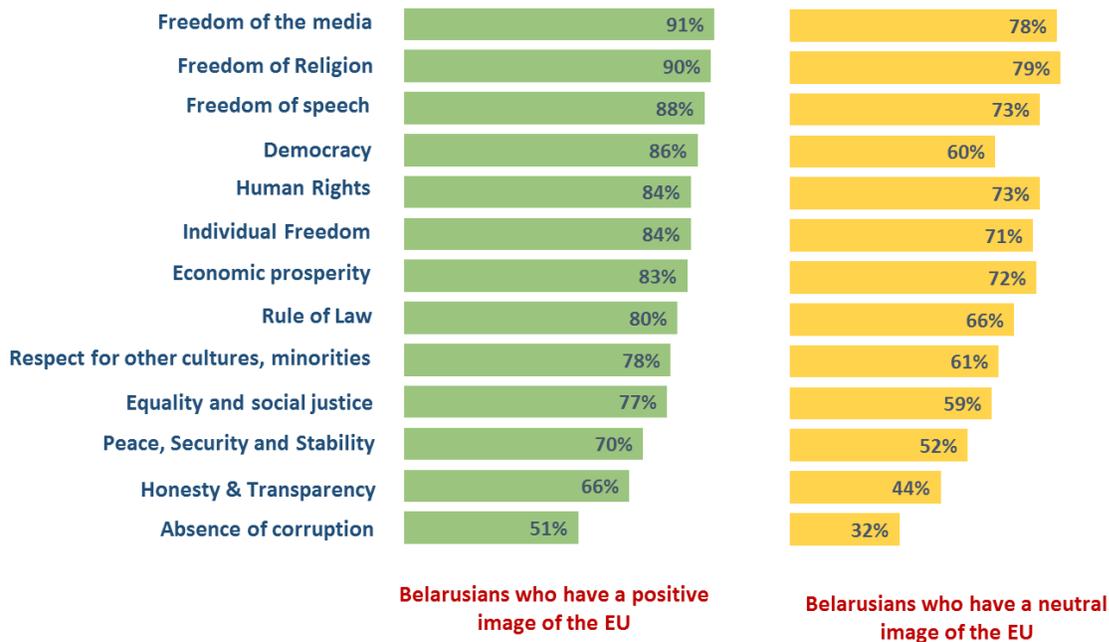
¹⁰ More details are provided in Annex, Table A3.

FIGURE 9 – Attitudes towards the EU: positive versus neutral



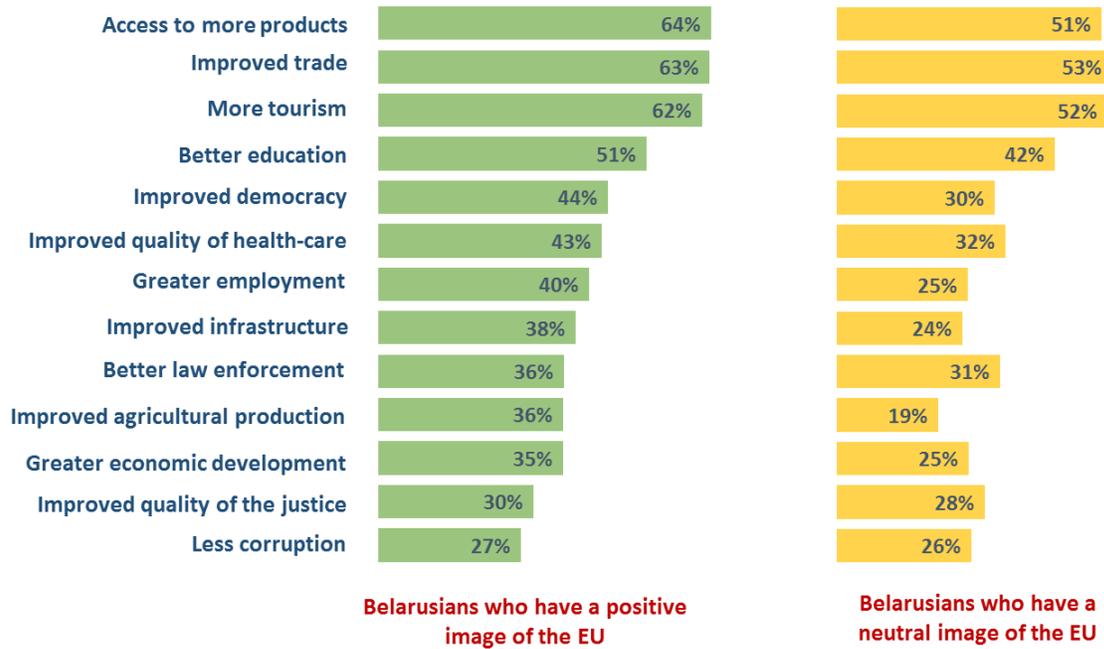
The top three values which Belarusians with a positive image of EU strongly associate with the EU are freedom of media (91%), freedom of religion (90%) and freedom of speech (88%). These values are also strongly linked with the EU for people with a neutral image of the EU (78%, 79% and 73% respectively). Individuals that have a positive image of the EU are also more likely to strongly link all other values with the EU compared to the neutral population: democracy (86% vs. 60%), human rights (84% vs. 73%), individual freedom (84% vs. 71%), economic prosperity (83% vs. 72%) and rule of law (80% vs. 66%) (fig. 10). The least associated values – such as absence of corruption, honesty and transparency – are similarly associated for both groups.

FIGURE 10 – Values strongly associated with the EU – positive versus neutral



Similarly, those with positive attitudes towards the EU see more benefits for Belarus from the EU compared to those who are neutrally oriented. As shown in figure 11, both positively and neutrally oriented individuals believe that the European Union has very much or fairly increased access to more products (64% and 51% respectively), improved trade (63% and 53%) and increased tourism (62% and 52%). More than half of those who have a positive image of the EU, and 42% of neutrally oriented people, also cited better education as a result of EU support. Moreover, both population groups seem to be more critical in terms of economic development (35% and 25% respectively) followed by quality of justice (30% and 28%) and corruption (27% and 26%).

FIGURE 11 – Areas that have very much or fairly benefitted from EU support: positive versus neutral

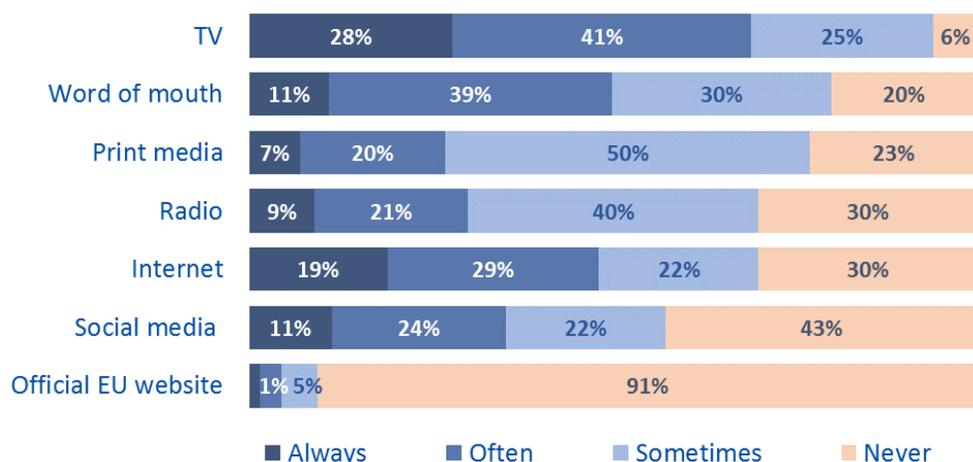


3.3. Sources of information on the EU

3.3.1. Media usage as sources of information

Among Belarusian citizens, television is the most popular media channel – 28% of the population always watch TV, 41% often and 25% sometimes (fig. 12). The next most commonly used source of information is word of mouth (from neighbours, friends, colleagues, etc.) – 80% of the population cite it as a source of information, with different frequencies. Interestingly, print media remains quite a popular information channel (used by 77% of the population), although the share of people that always use it is quite low (7%). Internet and radio are used by 70% of people and social media appears to be less popular (57% use social media with different frequencies). As for the EU website, it is never used by the majority of population (91%).

FIGURE 12 – Type of media used as a source of information (Q3.7)



The survey results show that people who do not frequently use any of the above-mentioned media account for only 12% of population of Belarus; 36% of Belarusians frequently use only traditional media and people that are active on social media and the internet represent half of the population (52%)¹¹ (tab. 8).

People that use only traditional media are more likely to be from the older age group, residing in small settlements and in the western part of the country (61%, 40% and 40% respectively), while young, employed and more highly educated people favour internet and social media more (79%, 58% and 65% respectively).

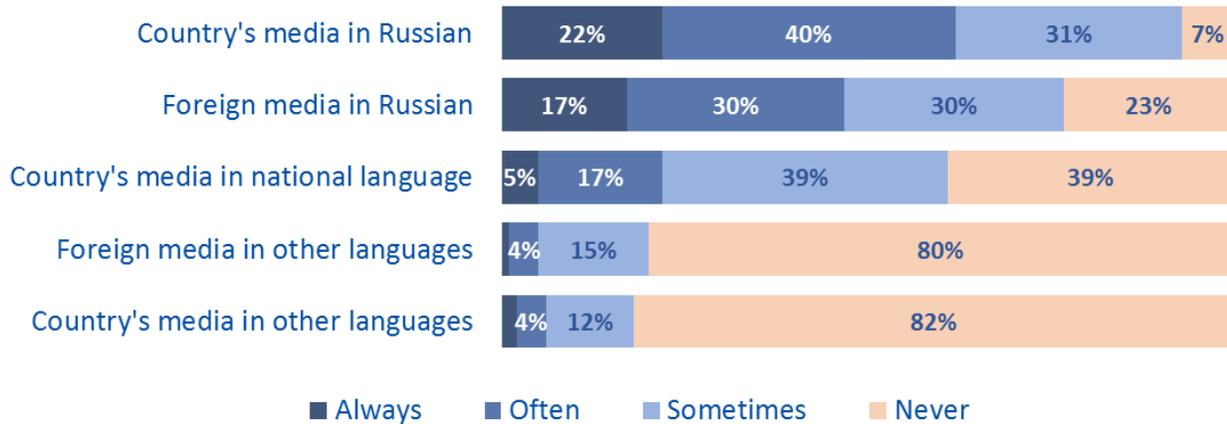
TABLE 8 – Type of media frequently used as a source of information

		Type of media frequently used as a source of information (Q3.8)				Word of mouth used as a source of information (Q3.8)
		No media	Only traditional media	Social media or internet	Total	
Settlement size	Equal to or more than 150,000 inhabitants	12%	36%	52%	100%	43%
	Between 20,000 and 150,000 inhabitants	6%	30%	64%	100%	51%
	Less than 20,000 inhabitants	14%	40%	46%	100%	57%
Gender	Male	9%	36%	55%	100%	51%
	Female	14%	37%	49%	100%	47%
Age group	15-34 years	12%	9%	79%	100%	50%
	35-54 years	7%	38%	55%	100%	51%
	55 years & above	17%	61%	22%	100%	46%
Education level	Low/medium level	12%	39%	49%	100%	50%
	High level	10%	25%	65%	100%	51%
Employment status	Employed / Self-employed	8%	34%	58%	100%	51%
	Unemployed or temporarily not working/inactive	16%	39%	45%	100%	47%
Geographical area	Centre	17%	32%	51%	100%	43%
	East	9%	37%	54%	100%	48%
	West	10%	40%	50%	100%	59%
Total		12%	36%	52%	100%	49%

¹¹ The first group includes all individuals who do not “always or often” use any of the surveyed media; the second group includes all individuals who “always or often” use only traditional media (such as television, radio and print media); while the last group includes all individuals who always or often use either the internet (including the official EU website) or social media.

Russian-language media, be it from Belarus or Russia, is the most commonly used media source (fig. 13). 22% of Belarusians always use the country’s media in Russian, 40% use it often and 31% sometimes; as for foreign media in Russian, it is also consumed by 77% of the population with different frequencies. Media in the national language is consumed by 61% of Belarusians, although only 5% of the population always use this source of information. Foreign or local media in other languages is rarely used: 80% of the population never use foreign media in other languages and 82% never use local media in other languages.

FIGURE 13 – Usage of media in Belarusian, Russian and other languages (Q3.7)



In the table below, the socio-demographic characteristics of the population have been analysed according to three main profiles – individuals that frequently use media in their national language (22%), individuals that mostly use media in Russian (71%) and those who rely on media in foreign languages (7%)¹².

Although the Russian language media is the most popular information source among all socio-demographic groups, inhabitants of small settlements (population less than 20,000) and those representing the older age group (55+) tend to rely more on media in their national language than other groups.

¹² The first group includes all individuals who “always or often” use media in Belarusian; the second group includes all individuals who “always or often” use national or foreign media in Russian; while the last group includes all individuals who “always or often” use national or foreign media in other languages. The frequent use of media in one language is not exclusive, in the sense that individuals might also access media in other languages.

TABLE 9 – Frequent usage of media in Belarusian, Russian and other languages

		Individuals that always or often use media		
		In national language	In Russian	In other foreign language
Settlement size	Equal to or more than 150,000 inhabitants	17%	71%	5%
	Between 20,000 and 150,000 inhabitants	22%	68%	10%
	Less than 20,000 inhabitants	29%	74%	8%
Gender	Male	21%	73%	6%
	Female	23%	70%	8%
Age group	15-34 years	12%	60%	8%
	35-54 years	18%	76%	5%
	55 years & above	36%	76%	8%
Education level	Low/medium level	23%	71%	5%
	High level	17%	75%	10%
Employment status	Employed / Self-employed	21%	72%	8%
	Unemployed or temporarily not working/inactive	24%	70%	6%
Geographical area	Centre	23%	65%	8%
	East	18%	74%	6%
	West	28%	72%	9%
Total		22%	71%	7%

Levels of trust towards different media sources are similar to the usage patterns of media: the most trusted media source is the country’s media in Russian (54%) followed by foreign media in Russian (48%). 44% of Belarusians also trust the country’s media in the national language, while the trust towards media sources in other languages is either low or people find it difficult to judge them in this regard. As for the different types of media, word of mouth and TV are the most trusted sources of information in Belarus (62% and 57% respectively). 27% of people trust the official EU website, although due to lack of use and awareness of this information source, the majority (57%) find it difficult to answer this question (i.e. replying with “don’t know”)¹³.

¹³ More details are provided in Annex, Table A4.

3.3.2. Sources of information about the EU

62% of Belarusians claimed to have heard about the European Union in the last three months, slightly up on 2016 (58%). As for the differences in terms of demographics, males are still more likely to have been exposed to information about the EU recently (66%). Additionally, people living in the western part of the country are more likely to have seen or heard information about the EU in the last three months (tab. 10).

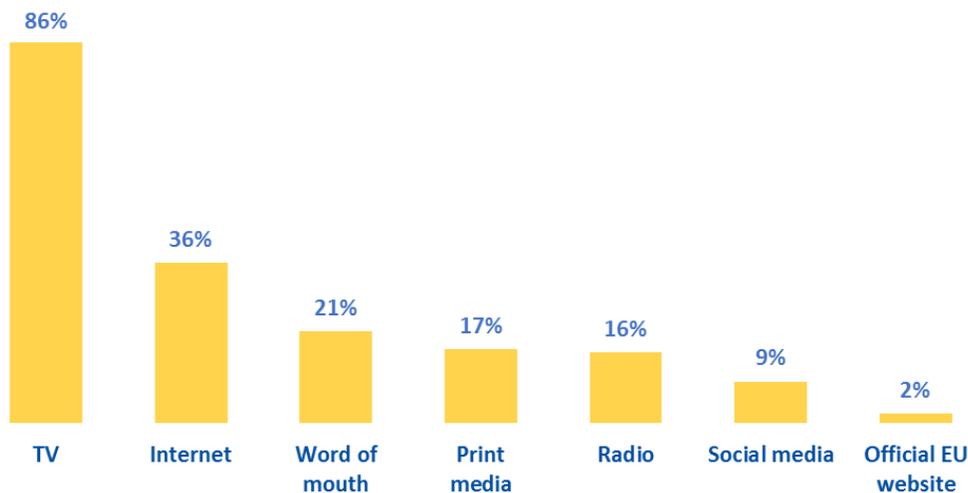
TABLE 10 – Exposure to information about the EU

Q3.2. Have you seen or heard any information about the EU in the last three months?		Yes	No	Total
Settlement size	Equal to or more than 150,000 inhabitants	55%	45%	100%
	Between 20,000 and 150,000 inhabitants	71%	29%	100%
	Less than 20,000 inhabitants	67%	33%	100%
Gender	Male	66%	34%	100%
	Female	58%	42%	100%
Age group	15-34 years	65%	35%	100%
	35-54 years	59%	41%	100%
	55 years & above	62%	38%	100%
Education level	Low/medium level	60%	40%	100%
	High level	68%	32%	100%
Employment status	Employed/ Self-employed	59%	41%	100%
	Unemployed or temporarily not working/inactive	66%	34%	100%
Geographical area	East	47%	53%	100%
	North/centre	61%	39%	100%
	West	79%	21%	100%
Total		62%	38%	100%

Percentages refer to Belarusians who have heard about the EU

Information sources for the EU are similar to general information sources – most of the information recently obtained by people came from television (86%). Every third citizen (36%) has heard or read information about the EU on the internet, and for about every fifth (21%) word of mouth is the primary information source. Print media and radio were cited as information sources on EU issues for 17% and 16% of the population respectively.

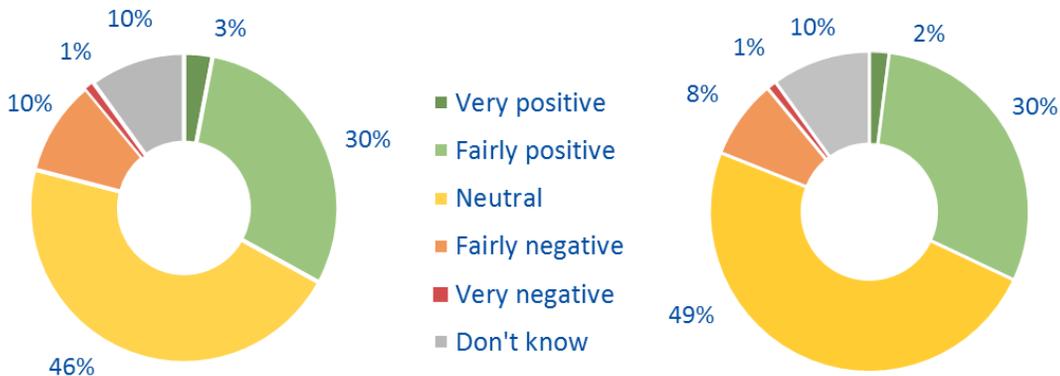
FIGURE 14 – Where or from whom you have you seen or heard information about the EU in the last three months? (Q3.2.1, multiple answers possible)



Percentages refer to Belarusians who have heard about the EU

Attitudes towards the image of the EU in the national media are the same as last year's – 46% of the population think that the way the EU is represented in the national media is rather neutral; the share of those who think that the EU is positively represented (33%) is higher compared to those who think it is negatively portrayed (11%).

FIGURE 15 – In general, how would you say the EU was presented in the national media? (Q3.3)



Percentages refer to Belarusians who have heard about the EU

Inhabitants of large cities are more critical towards the representation of the EU in the national media – only 25% of them think the EU's image in national media is positive compared to 37% and 41% of medium and small city residents respectively.

TABLE 11 – Representation of the EU in the national media

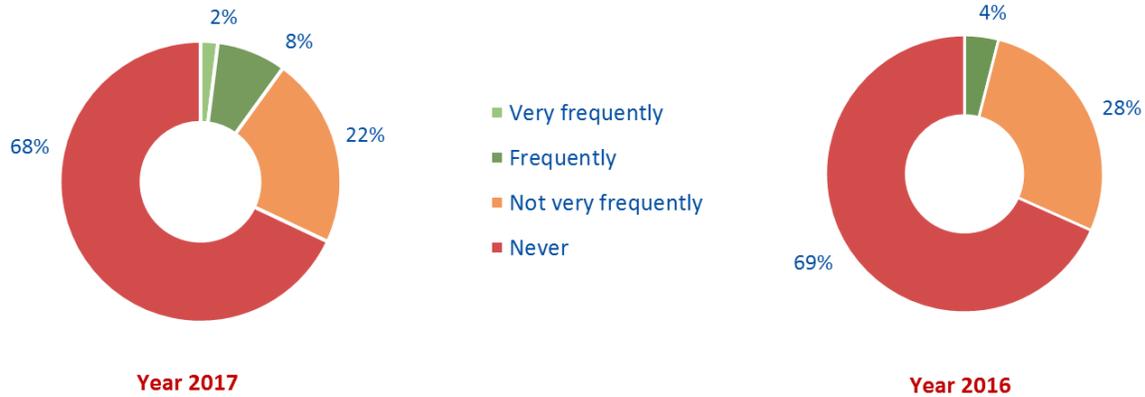
Q3.3. In general how would you say the EU was presented in the national media?		Positive	Neutral	Negative	Don't know	Total
Settlement size	Equal to or more than 150,000 inhabitants	25%	53%	10%	12%	100%
	Between 20,000 and 150,000 inhabitants	37%	46%	7%	10%	100%
	Less than 20,000 inhabitants	41%	37%	15%	7%	100%
Gender	Male	34%	45%	13%	8%	100%
	Female	32%	47%	9%	12%	100%
Age group	15-34 years	35%	43%	16%	6%	100%
	35-54 years	32%	47%	11%	10%	100%
	55 years & above	32%	47%	7%	14%	100%
Education level	Low/medium level	32%	46%	11%	11%	100%
	High level	37%	41%	13%	9%	100%
Employment status	Employed/ Self-employed	31%	49%	12%	8%	100%
	Unemployed or temporarily not working/inactive	36%	42%	11%	11%	100%
Geographical area	East	36%	50%	3%	11%	100%
	North/centre	29%	45%	15%	11%	100%
	West	37%	44%	11%	8%	100%
Total		33%	46%	11%	10%	100%

Percentages refer to Belarusians who have heard about the EU

The majority of the population (79%) claim that the information they read, watch or access online does not help them to have a better understanding of the EU. Only 18% find the online information helpful.

The following section looks specifically at sources of information about the EU, and therefore refers only to Belarusians who actively look for/access information on the EU. Only one in ten people access information on the European Union very frequently or frequently (8% and 2% respectively), showing an increase since 2016 when only 4% of Belarusians claimed to be looking for this type of information. Still, the majority of people (68%) never try to access information on the EU.

FIGURE 16 – How often do you look for / access information on the EU? (Q3.1)



Percentages refer to Belarusians who have heard about the EU

The highest share of people who have frequently looked for information on the EU can be found in small settlements (16%) and is represented mainly by young people and those with high levels of education (tab. 12). Inhabitants of large settlements and those representing the eldest age group are less likely to look for this type of information.

TABLE 12 – Accessing information about the EU

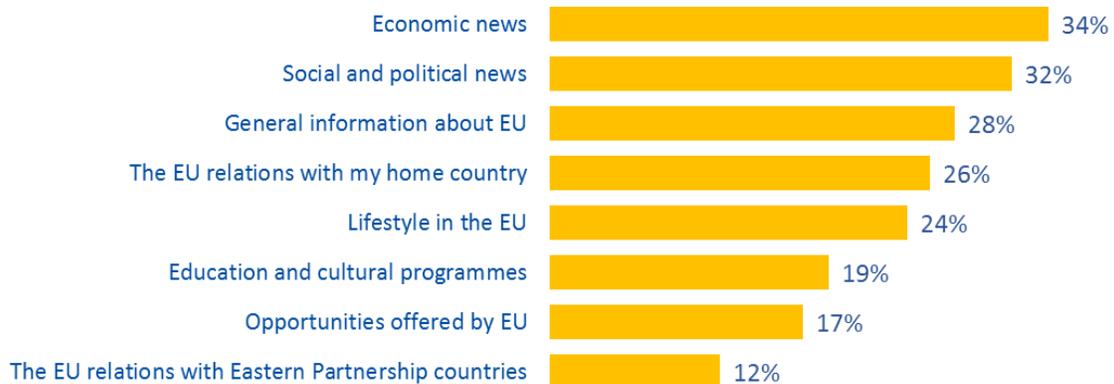
Q3.1. How often do you look for/ access information on the EU?		Frequently	Not very frequently	Never	Total
Settlement size	Equal to or more than 150,000 inhabitants	6%	16%	78%	100%
	Between 20,000 and 150,000 inhabitants	7%	32%	61%	100%
	Less than 20,000 inhabitants	16%	26%	58%	100%
Gender	Male	11%	23%	66%	100%
	Female	8%	22%	70%	100%
Age group	15-34 years	13%	26%	61%	100%
	35-54 years	9%	26%	65%	100%
	55 years & above	7%	15%	78%	100%
Education level	Low/medium level	9%	22%	69%	100%
	High level	15%	26%	59%	100%
Employment status	Employed/self-employed	10%	23%	67%	100%
	Unemployed or temporarily not working/inactive	9%	22%	69%	100%
Geographical area	East	9%	28%	63%	100%
	North/centre	9%	22%	69%	100%
	West	12%	17%	72%	100%
Total		10%	22%	68%	100%

Percentages refer to Belarusians who have heard about the EU

The vast majority of Belarusians who search for information about the EU access information in Russian (94%), while only 4% access it in English and 2% in their national language.

People who search for information on the EU are mainly concerned with economic news (34%), social and political news (32%), general affairs happening in the European Union (28%) and the relations of Belarus with the EU (26%). One in four of those accessing information on the EU (24%) are interested in the lifestyle in the EU, and one in five (19%) try to find out more about the education system. Only 12% of those who ever look for information on the EU are concerned with its relations with the Eastern Partner countries.

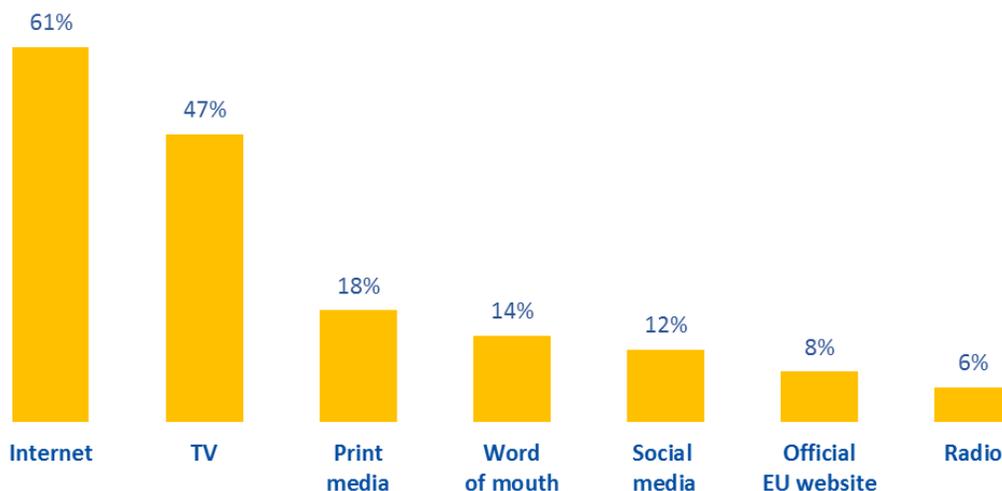
FIGURE 17 – What type of information do you normally look for? (Q3.1.2, multiple answers possible)



Percentages refer to Belarusians who have looked for/accessed information on the EU

As mentioned above, TV is the most common information source for information about the EU (86%), but when asked about the information source they turn to when searching for particular information, most Belarusians tend to use the internet (61%), while TV is the second most used source (47%). 18% of those searching for information about the EU rely on print media and 14% on word of mouth. The official website of the EU is used by only 8%.

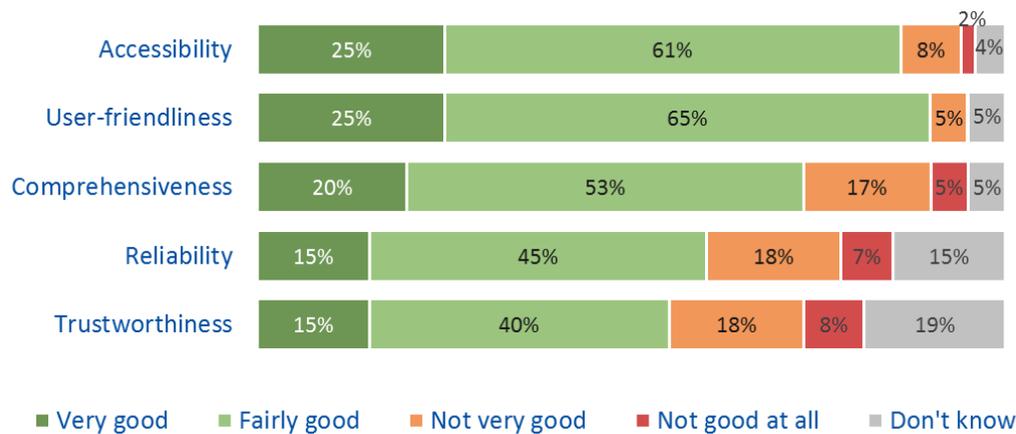
FIGURE 18 – Where do you go to find information about the EU? (Q3.1.4, multiple answers possible)



Percentages refer to Belarusians who have looked for/accessed information on the EU

In terms of accessibility, information about the EU is rated negatively by only 10% of those who search actively, and even fewer people (5%) say that it is not user friendly. 73% of Belarusians searching for information about the EU say that it is comprehensive, 60% think that it is reliable and 55% think the information is entirely or fairly trustworthy.

FIGURE 19 – How would you rate the information in terms of... (Q3.1.5)



Percentages refer to Belarusians who have looked for/accessed information on the EU

It is worth noting that every tenth Belarusian (10%) among those who have heard about the EU uses any of the official EU websites, be it the institutional website, delegation website, websites of EU projects, EU Neighbours east portal or EU social media accounts. The EU institutional website and EU project websites are the most commonly used, by 4% of the population.

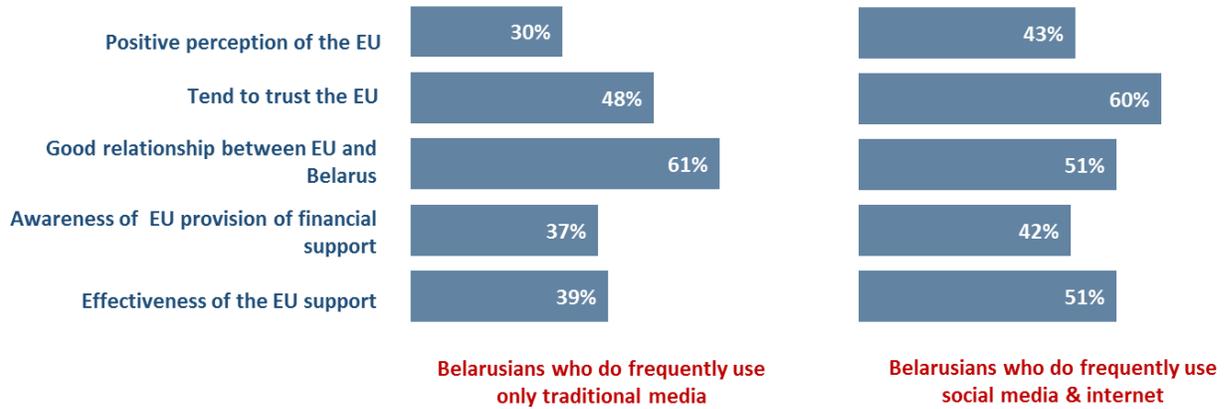
3.3.3. Sources of information and attitude towards the EU

As in section 3.3.1, the attitudes of Belarusians towards the EU have been analysed according to three main profiles – individuals that do not frequently use any media, individuals that frequently rely on traditional media and those who are regularly active on social media. Attitudes towards the EU and its perceived values have been analysed according to these subgroups in order to find out to what extent media consumption patterns define influences on people’s attitudes.

In general, the survey results show that the consumption of internet and social media as information sources positively affects attitudes towards the EU. Only one in three (30%) of those that frequently use only traditional media have a positive attitude towards the EU, while this figure goes up among people who use the internet and social media: 43% of Belarusians who frequently use social media or the internet have a positive image of the EU. In the same way, people who are dependent on traditional media are less convinced of the effectiveness of EU financial support, compared to those using new media. Trust towards the EU is also higher among users of the internet and social media¹⁴.

¹⁴ More details are provided in Annex, Table A5.

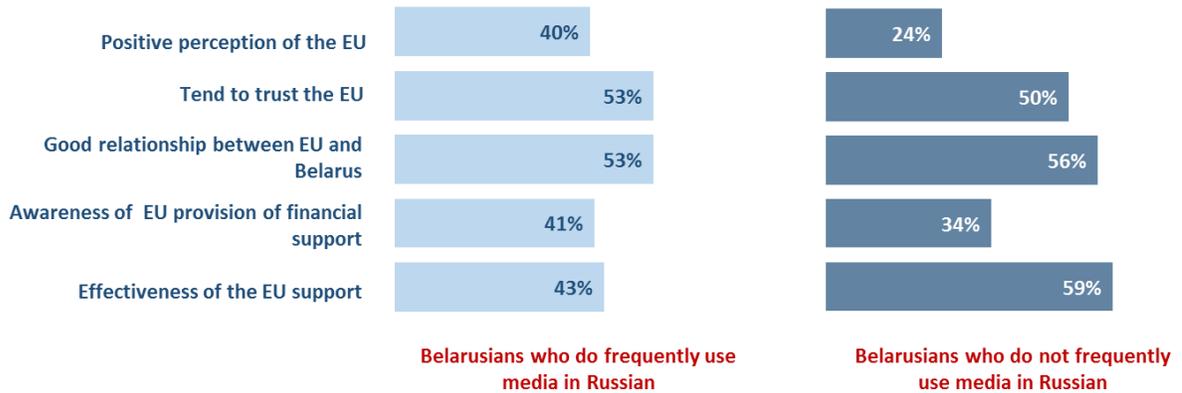
FIGURE 20 – Type of media frequently used as a source of information and attitude towards the EU



Percentages refer to Belarusians who have heard about the EU

Attitudes towards the EU have also been assessed by comparing the people that frequently use media in Russian against those who do not (fig. 21).¹⁵ In general, Russian media users tend to have a more positive perception of the European Union and to be aware of its financial support, although non-Russian media consumers consider the EU financial support to be effective. No major differences are observed between the two groups in terms of trust towards the EU and evaluating its relations with Belarus.

FIGURE 21 – Usage of media in Russian and attitude towards the EU



Percentages refer to Belarusians who have heard about the EU

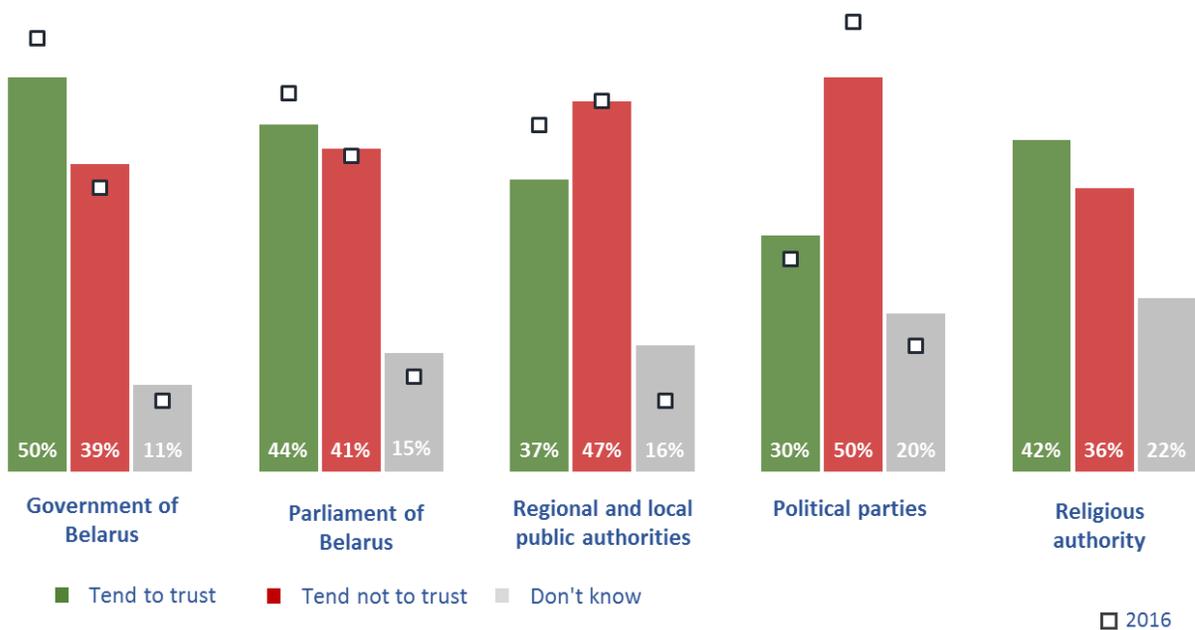
¹⁵ More details are provided in Annex, Table A6.

3.4. View of Belarus’s current situation and future expectations

3.4.1. View of Belarus’s current situation

The survey shows the most trusted institutions in Belarus to be the government and parliament (50% and 44% respectively). However, Belarusian citizens’ level of trust towards these institutions has fallen slightly since 2016: 55% of Belarusians reported trust towards the government in 2016, and 50% in 2017, with a similar decline in trust towards the parliament (fig. 22). The proportion of people who did not trust regional and local public authorities remains at the same level across the years (47%). However, the level of distrust towards political parties fell by 7% since 2016 (57% vs. 50% in 2017). Another finding relates to the new variable that was included in 2017: the institutions of religious authority are trusted by less than half of Belarusian citizens, while more than 35% of people tend not to trust it.

FIGURE 22 – Please tell us your level of trust for the following institutions. (Q4.1)



When analysing the current situation in terms of democracy in Belarus, the results suggest that 17% fewer people seem to be very or fairly satisfied with the way democracy works in Belarus than last year (48% vs. 31% in 2017) (fig. 23).

The proportion of people who said they are totally dissatisfied with the functioning of democracy in their country has also increased since 2016.

FIGURE 23 – On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy works in Belarus? (Q4.3)



If looking at the same variable (the way democracy works in the country) across various socio-demographic groups, one can see that residents of large cities (64%), male citizens (59%), the younger generation (61%), people with a high level of education (62%) and those from the west of the country (58%) tend to show more criticism and a greater level of dissatisfaction with democracy in Belarus than other sub-groups within the same categories (tab. 13).

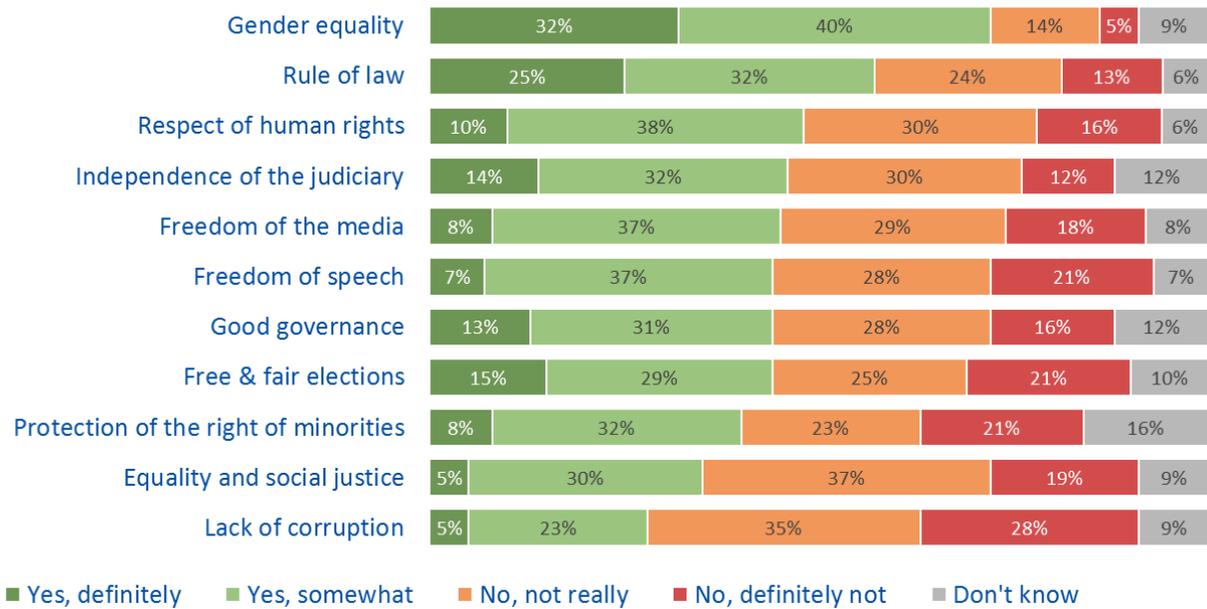
TABLE 13 – Satisfaction with democracy in Belarus

Q4.3. On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy works in Belarus?		Satisfied	Not satisfied	Don't know	Total
Settlement size	Equal to or more than 150,000 inhabitants	27%	64%	9%	100%
	Between 20,000 and 150,000 inhabitants	35%	46%	19%	100%
	Less than 20,000 inhabitants	33%	47%	20%	100%
Gender	Male	27%	59%	14%	100%
	Female	34%	51%	15%	100%
Age group	15-34 years	22%	61%	17%	100%
	35-54 years	33%	54%	13%	100%
	55 years & above	37%	51%	12%	100%
Education level	Low/medium level	32%	53%	15%	100%
	High level	29%	62%	9%	100%
Employment status	Employed/ Self-employed	32%	56%	12%	100%
	Unemployed or temporarily not working/inactive	29%	54%	17%	100%
Geographical area	East	27%	53%	20%	100%
	North/centre	36%	55%	9%	100%
	West	24%	58%	18%	100%
Total		31%	55%	14%	100%

In terms of values that apply to Belarus, the largest share of the population (72%) feel gender equality applied in their country, compared to other values. More than half of the population believe that the rule of law exists in Belarus (57%), while nearly half of citizens surveyed consider that respect of human rights (48%) and independence of the judiciary (46%) apply in the country (fig. 24). People’s attitudes are also positive towards the remaining elements, such as freedom of speech, protection of the rights of minorities, freedom of the media, free and fair elections and good governance – the proportion of people considering that these elements apply in Belarus varies from 40 to 45%. Moreover, results suggest that equality and social justice and lack of corruption seem to be the least applicable elements in Belarus (supported by 35% and 28% of people respectively).

These indicators seem to have fallen compared to 2016, thus highlighting a shift from a positive opinion to a negative and/or more indefinite position.

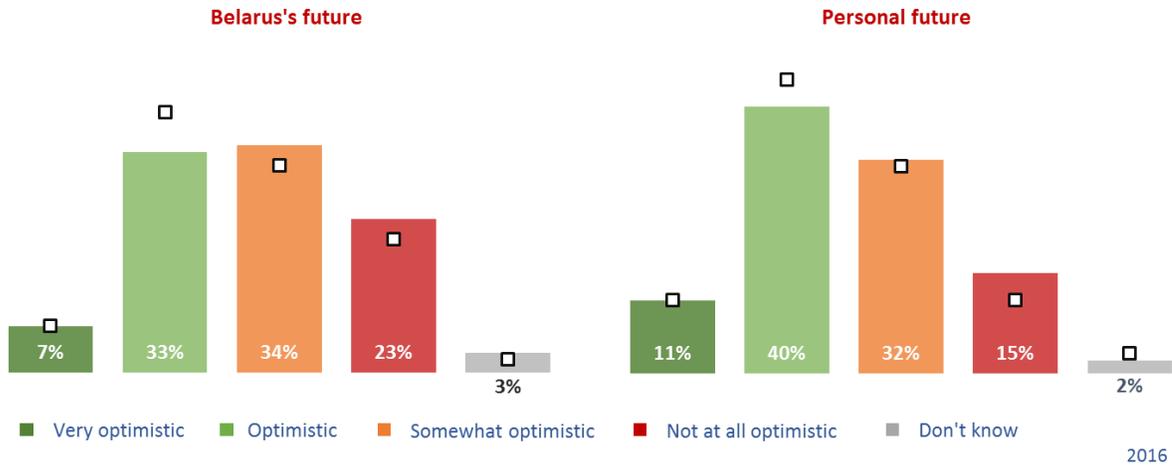
FIGURE 24 – To what extent do you think that the following elements apply in Belarus? (Q4.4)



3.4.2. Future expectations

Belarusians generally seem to be more optimistic regarding their own future (51%) than the future of their country (40%). In both cases, the degree of optimism expressed by Belarusians has fallen slightly compared to the previous year (55% and 46% respectively) (fig. 25).

FIGURE 25 – How optimistic are you about the future of your country? (Q4.5) & How optimistic are you about your personal future? (Q4.6)



The degree of optimism towards the country’s future somewhat differs among different socio-demographic groups. Namely, the highest level of pessimism/critical attitude was observed among people residing in large settlements (67%), males (59%), the middle age group (61%), employed individuals (60%) and people residing in the west of the country (67%) – tab. 14.

TABLE 14 – Optimism regarding Belarus’s future

Q4.5. How optimistic are you about the future of your country?		Optimistic	Pessimistic	Don't know	Total
Settlement size	Equal to or more than 150,000 inhabitants	31%	67%	2%	100%
	Between 20,000 and 150,000 inhabitants	51%	43%	6%	100%
	Less than 20,000 inhabitants	46%	51%	3%	100%
Gender	Male	39%	59%	2%	100%
	Female	40%	55%	5%	100%
Age group	15-34 years	41%	54%	5%	100%
	35-54 years	34%	61%	5%	100%
	55 years & above	44%	55%	1%	100%
Education level	Low/medium level	39%	58%	3%	100%
	High level	41%	57%	2%	100%
Employment status	Employed/ Self-employed	38%	60%	2%	100%
	Unemployed or temporarily not working / inactive	42%	53%	5%	100%
Geographical area	East	40%	53%	7%	100%
	North/centre	44%	54%	2%	100%
	West	31%	67%	2%	100%
Total		40%	57%	3%	100%

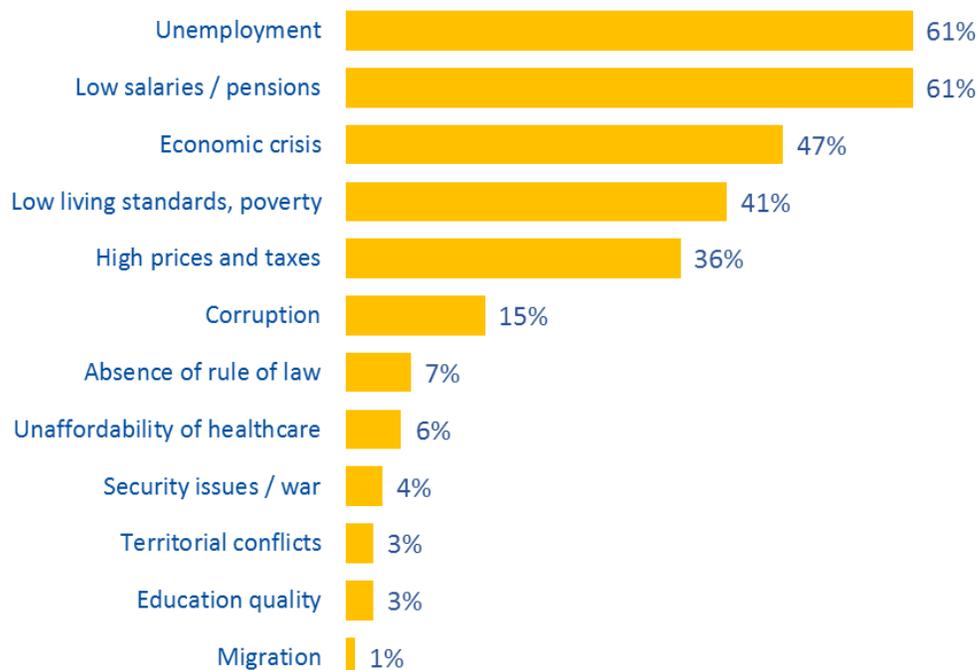
As for their personal future, people from large settlements (53%), the middle age group (53%), those with lower levels of education (50%) and people living in the western part of the country (58%) tend to be more pessimistic than other groups.

TABLE 15 – Optimism regarding personal future

		Optimistic	Pessimistic	Don't know	Total
Settlement size	Equal to or more than 150,000 inhabitants	46%	53%	1%	100%
	Between 20,000 and 150,000 inhabitants	58%	38%	4%	100%
	Less than 20,000 inhabitants	54%	44%	2%	100%
Gender	Male	52%	46%	2%	100%
	Female	49%	48%	3%	100%
Age group	15-34 years	56%	41%	3%	100%
	35-54 years	44%	53%	3%	100%
	55 years & above	52%	46%	2%	100%
Education level	Low/medium level	48%	50%	2%	100%
	High level	58%	39%	3%	100%
Employment status	Employed/ Self-employed	49%	49%	2%	100%
	Unemployed or temporarily not working / inactive	53%	44%	3%	100%
Geographical area	East	50%	45%	5%	100%
	North/centre	57%	42%	1%	100%
	West	39%	58%	3%	100%
Total		51%	47%	2%	100%

The most pressing problems in Belarus are unemployment and low salaries and pensions (61% for both), followed by the economic crisis (47%), low living standards and poverty (41%) and high prices and taxes (36%) (fig. 26). As previously noted, the survey showed that Belarusians singled out employment and economic development as areas where the EU should play a greater role.

FIGURE 26 – What do you consider to be the most pressing problems facing your country? (Q4.2, multiple answers possible)

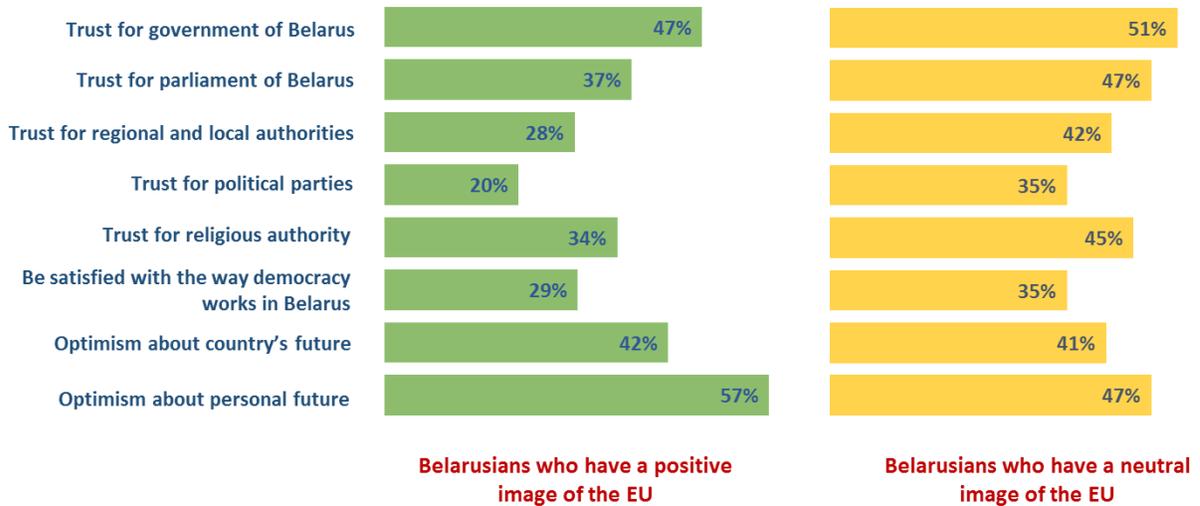


3.4.3. Views of the country and attitude towards the EU: a snapshot

As in section 3.2.2, the views of the country and attitude towards the EU have been analysed according to two main profiles: individuals that have a positive attitude towards the EU and those who are mostly neutral.¹⁶ Eight indicators were considered: trust in the government, trust in the parliament, trust in regional and local authorities, trust in political parties, trust in religious authority, satisfaction with the functioning of democracy, optimism about the country’s future and optimism about the respondents’ personal futures.

Interestingly, individuals that have a neutral image of the EU are more likely to be more positively oriented towards state bodies like the government of Belarus, its parliament, regional and local authorities and political parties; they are also more likely to sympathise with local religious authorities compared to those with a positive image of the EU and are more satisfied with the way democracy works in Belarus. On the other hand, the level of personal optimism is higher among people feeling positive about the EU.¹⁷

FIGURE 27 – Views of the country and attitude towards the EU: positive versus neutral



Almost everyone, regardless of their attitude towards the European Union, highlighted the same pressing problems in Belarus, with unemployment and low salaries/pensions at the top of the list (both 61%)¹⁸.

¹⁶ Individuals that were mostly negatively oriented were excluded from the comparison, as their number was too small for the results to be statistically significant.

¹⁷ More details are provided in Annex, Table A7.

¹⁸ More details are provided in Annex, Table A8.

4. Annex

TABLE A1 – Benefits from current EU support

Q2.8. To what extent would you say that Belarus has benefitted from the current European Union support in the following areas?						
	Very much	Fairly	Not very much	Not at all	Don't know	Total
More tourism	11%	42%	24%	11%	12%	100%
Access to more products and services	11%	42%	26%	11%	10%	100%
Improved trade	7%	46%	26%	11%	10%	100%
Better education	5%	37%	29%	15%	14%	100%
Improved quality of healthcare system	6%	28%	30%	21%	15%	100%
Improved democracy	4%	30%	30%	21%	15%	100%
Better law enforcement	3%	27%	27%	28%	15%	100%
Greater employment opportunities	5%	25%	30%	28%	12%	100%
Improved infrastructure (streets, sewage, water, etc.)	4%	23%	38%	22%	13%	100%
Greater economic development	4%	23%	39%	22%	12%	100%
Improved quality of justice system	2%	24%	30%	26%	18%	100%
Improved agricultural production	4%	21%	35%	25%	15%	100%
Less corruption	2%	22%	28%	32%	16%	100%

Percentages refer to Belarusians who have heard about the EU

TABLE A2 – Areas in which the EU should play a greater role

Q2.9. Please tell us in which sectors you think the European Union should play a greater role		
	The specific item was selected as the first most important area	The specific item was selected as the first, second or third most important area
Promote economic development	27%	54%
Create greater employment opportunities	14%	40%
Improve trade	11%	34%
Improve democracy	10%	20%
Improve infrastructure (streets, sewage, water, etc.)	8%	20%
Promote access to more products and services	8%	24%
Improve quality of healthcare system	7%	27%
Promote a better education	4%	20%
Increase tourism	4%	18%
Promote better law enforcement	3%	17%
Improve agricultural production	2%	10%
Reduce corruption	2%	12%
Improve quality of justice system	0%	4%

Percentages refer to Belarusians who have heard about the EU

TABLE A3 – Attitudes towards the EU: positive versus neutral

		Image of the EU	
		Positive	Neutral
Trust towards the EU	Tend to trust	75%	45%
	Tend not to trust	10%	23%
	Don't know	15%	32%
	<i>Total</i>	100%	100%
Relations between the EU and Belarus	Good	63%	53%
	Bad	27%	27%
	Don't know/No relations	10%	20%
	<i>Total</i>	100%	100%
Awareness of financial support by the EU	Yes	54%	33%
	No	25%	32%
	Don't know	21%	35%
	<i>Total</i>	100%	100%
Effectiveness of the EU's support	Effective	56%	41%
	Not effective	42%	55%
	Don't know	2%	4%
	<i>Total</i>	100%	100%

TABLE A4 – Trust towards different type of media
Q3.9. & Q3.10. Which is your level of trust for the following media as a source of information?

	Tend to trust	Tend not to trust	Don't know	Total
Official EU website	27%	16%	57%	100%
Television	57%	34%	9%	100%
Radio	45%	31%	24%	100%
Print media	46%	37%	17%	100%
Social media	35%	36%	29%	100%
Internet	54%	26%	20%	100%
Word of mouth	62%	16%	22%	100%
Country's media in national language	44%	37%	19%	100%
Country's media in Russian	54%	36%	10%	100%
Country's media in other languages	15%	42%	43%	100%
Foreign media in Russian	48%	30%	22%	100%
Foreign media in other languages	20%	37%	43%	100%

TABLE A5 – Type of media frequently used as a source of information and attitude towards the EU

		Type of media frequently used as source of information (Q3.8)		Word of mouth frequently used as source of information (Q3.8)	
		Only traditional media	Social media or internet	Yes	No
Perception of the EU	Positive	30%	43%	36%	35%
	Neutral	62%	49%	53%	55%
	Negative	7%	6%	8%	5%
	Don't know	1%	2%	3%	5%
	Total	100%	100%	100%	100%
Trust towards the EU	Tend to trust	48%	60%	58%	46%
	Tend not to trust	25%	20%	21%	23%
	Don't know	27%	20%	21%	31%
	Total	100%	100%	100%	100%
Relations between the EU and Georgia	Good	61%	51%	57%	51%
	Bad	21%	33%	29%	26%
	Don't know/No relations	18%	16%	14%	23%
	Total	100%	100%	100%	100%
Awareness of financial support by the EU	Yes	37%	42%	39%	39%
	No	32%	28%	32%	28%
	Don't know	31%	30%	29%	33%
	Total	100%	100%	100%	100%
Effectiveness of the EU's support	Effective	39%	51%	46%	48%
	Not effective	57%	45%	51%	47%
	Don't know	4%	4%	3%	5%
	Total	100%	100%	100%	100%

Percentages refer to Belarusians who have heard about the EU

TABLE A6 – Frequent usage of media in Russian and attitude towards the EU

		Frequently used media in Russian	
		Yes	No
Perception of the EU	Positive	40%	24%
	Neutral	51%	61%
	Negative	7%	3%
	Don't know	2%	12%
	Total	100%	100%
Trust towards EU	Tend to trust	53%	50%
	Tend not to trust	25%	13%
	Don't know	22%	37%
	Total	100%	100%
Relations between the EU and Belarus	Good	53%	56%
	Bad	30%	20%
	Don't know/No relations	17%	24%
	Total	100%	100%
Awareness of financial support by the EU	Yes	41%	34%
	No	30%	32%
	Don't know	29%	34%
	Total	100%	100%
Effectiveness of the EU support	Effective	43%	59%
	Not effective	53%	39%
	Don't know	4%	2%
	Total	100%	100%

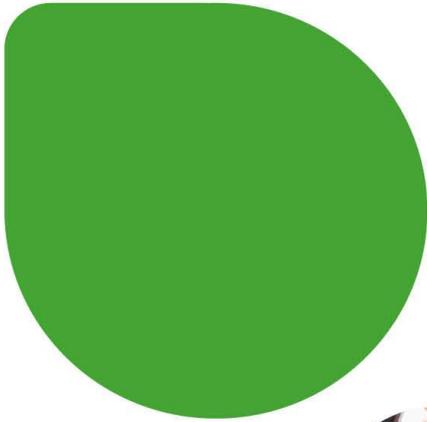
Percentages refer to Belarusians who have heard about the EU

TABLE A7 – Views of the country and attitude towards the EU: positive versus neutral

		Attitude towards the EU	
		Positive	Neutral
Trust for government of Belarus	Tend to trust	47%	51%
	Tend not to trust	46%	34%
	Don't know	7%	15%
	<i>Total</i>	<i>100%</i>	<i>100%</i>
Trust for parliament of Belarus	Tend to trust	37%	47%
	Tend not to trust	52%	35%
	Don't know	11%	18%
	<i>Total</i>	<i>100%</i>	<i>100%</i>
Trust for regional and local authorities	Tend to trust	28%	42%
	Tend not to trust	58%	40%
	Don't know	14%	18%
	<i>Total</i>	<i>100%</i>	<i>100%</i>
Trust for political parties	Tend to trust	20%	35%
	Tend not to trust	60%	43%
	Don't know	20%	22%
	<i>Total</i>	<i>100%</i>	<i>100%</i>
Trust for religious authority	Tend to trust	34%	45%
	Tend not to trust	42%	32%
	Don't know	24%	23%
	<i>Total</i>	<i>100%</i>	<i>100%</i>
Satisfaction with the way democracy works in Belarus	Yes	29%	35%
	No	59%	51%
	Don't know	12%	14%
	<i>Total</i>	<i>100%</i>	<i>100%</i>
Optimism about country's future	Optimistic	42%	41%
	Pessimistic	54%	57%
	Don't know	4%	2%
	<i>Total</i>	<i>100%</i>	<i>100%</i>
Optimism about personal future	Optimistic	57%	47%
	Pessimistic	42%	50%
	Don't know	1%	3%
	Total	100%	100%

TABLE A8 – Most pressing problems in Belarus

Q4.2. What do you consider to be the most pressing problems facing your country? (multiple answers possible)		
	Attitude towards the EU	
	Positive	Neutral
Unemployment	63%	58%
Low salaries / pensions	53%	68%
Economic crisis	44%	47%
Low living standard, poverty	42%	40%
High prices and taxes	27%	42%
Corruption	19%	13%
Unaffordability of healthcare	9%	5%
Absence of rule of law	7%	7%
Security issues / war	5%	2%
Education quality	3%	3%
Territorial conflicts	2%	4%
Migration	1%	0%



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