



**ANNUAL SURVEY REPORT:
REGIONAL OVERVIEW**

4th Wave (Spring 2019)

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

MAY 2019

**#
STRONGER
TOGETHER**



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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 February and March 2019, a fourth wave of annual surveys was carried out across the six Eastern partner countries (Armenia, Azerbaijan, Belarus, Georgia, the Republic of 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 the EaP countries.

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

The purpose of the annual surveys is to investigate the opinion and the level of information that citizens of the EaP countries have on the EU in general and, in particular, on EU-funded cooperation and development programmes/projects. In order to monitor changes over time, the surveys are being carried out annually from 2016 until 2020.

This document presents the results of the **4th wave of annual surveys** (spring 2019) conducted in **the EaP region**¹ and is organized around four main sections:

- **General perceptions of the EU**
This section looks at how citizens perceive the EU’s image, the relationship between their country and the EU, their awareness of the EU’s financial support and their opinion of its benefits, as well as their level of trust towards the EU, also compared with the role of other foreign institutions. During the third wave, a new set of questions that touched upon perceived myths about the EU, was also added, in order to gather greater insights on how the EU is perceived by citizens.
- **Sources of information**
This section looks at the main sources of information in the country, both in the national language and other foreign languages. Specific focus is placed on EU-related information, programmes financed by the EU and its institutional communication instruments.
- **Country evaluation and future expectations**
This section provides an assessment of how citizens view their country’s and their personal future. Specific focus is placed on current functioning of democracy and most pressing concerns.
- **Profiling attitudes towards the EU**
This section is dedicated to profiling citizens with a positive and a neutral stance towards the EU. Attitudes are profiled against a comprehensive set of indicators, such as the main socio-demographic characteristics, passive and active exposure to EU-related information, awareness and effectiveness of EU’s financial support, level of trust towards the EU and other international institutions, perceptions of the country’s and personal future and main concerns, as well as the common beliefs about the EU.

All sections, together with an analysis of the results of the 4th wave of the survey, also provide comparisons between the findings of the 2018, 2017 and 2016 surveys where relevant.

¹ Country reports have been produced for each of the Eastern partner countries.

2. Research methodology in brief

The survey was conducted in February - March 2019, following the same methodology adopted in the previous rounds of data collection (spring 2018, 2017 and 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 stratified by unit size, expressed in terms of population, level of urbanisation and geographical area. Three groups of settlements² and three areas 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 age³ 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 walk⁴ 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. The calibration variables were the same as those used in the previous wave (settlement size, gender, age, employment status, geographical area, education level, religious faith and mother tongue).

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) / Capital.

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

⁴ 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 of the EU

- Around half of the population of the six EaP countries has a positive image of the EU; around one third has a neutral stance (34%) and only one tenth (10%) feels negative about it. **The perceptions are the most positive since 2016 (52%, up 7 percentage points) and the awareness of the EU is also very high – only 4% of the EaP population is ‘not aware of’ or has ‘never heard about the EU’.**
- The increase in the number of EU-supporters was noted across all six EaP countries – and particularly in Armenia (62%, up 14%), where the consequences of the Velvet Revolution in 2018 produced a significant shift in attitudes towards the country’s institutions as well as the EU. Notable increases in positive perceptions were also observed in Ukraine (56%, up 7%), Moldova (55%, up 7%) and Azerbaijan (46%, up 7%). As in 2018, Belarusians account for the lowest share of positively-oriented citizens (36%, up 2%). The situation in Georgia, remained constant with 50% of citizens positive about the EU.
- For the fourth year in a row, **‘peace, security and stability’ is the primary value for 65% of the overall population**, reflecting the challenging geo-political position of EaP countries. In fact, aside from Moldovans – whose primary value is ‘absence of corruption’ – nearly three quarters of Ukrainians (73%) and over half of Belarusians (60%), Armenians (58%), Georgians (55%) and Azerbaijanis (52%) mentioned it. At the same time, 72% of the EaP population ‘strongly’ or ‘very strongly’ associated it with the EU, revealing how EaP citizens perceive it as a solid ‘safeguard’.
- Most of the EaP population also associated the EU with all other values – especially ‘human rights’ and ‘economic prosperity’ (80% both) – showing how individuals, in general, well acknowledge the positive economic and democratic climate prevailing in the EU. **The EU is, in fact, the most trusted foreign institution and the only one trusted by the majority of EaP citizens (58%).**
- **At country level, the EU enjoys the highest levels of trust in Georgia (71%), followed shortly by Moldova (65%), Ukraine (63%) and Armenia (61%).** Trust levels are somewhat lower in Belarus, still most citizens are confident in the EU (51%). In Azerbaijan, trust levels are very low (35% of citizens trust the EU and between 20% and 25% for the UN, NATO and EEU).

EU relations with EaP countries and awareness of EU financial support

- Overall, **67% of EaP citizens believe that relations between their country and the EU are ‘good’**, 17% consider them as ‘bad’ and 11% did not comment on the quality or ‘were not aware of them’ (5%). Armenians were the most positive (92%, up 12%) – and more so than in 2018. A more positive trend was also recorded in Belarus (62%, up 12%) and Azerbaijan (74%, up 9%). Perceptions were stable in Ukraine (63%, up 1%) and only slightly less positive in Georgia (80%, down 3%) and Moldova (68%, down 6%). It is worth noting that between 12% and 20% of Azerbaijanis, Belarusians and Ukrainians did not comment on the quality of the relations or ‘were not aware of them’.
- Currently **54% of the EaP population knows that the EU financially supports their country** (it was 57% in 2018). **The ‘rating’ of its effectiveness continues to rise slowly in line with the upward historical trend (50% of citizens who were aware of the EU support, up 7% since 2016).** Armenians (72%), Azerbaijanis (70%) and Georgians (62%) are more likely to appreciate it more than the Moldovans (53%), Ukrainians (46%) and, particularly, Belarusians (41%).

- **Over half of EaP citizens who are aware of the EU's financial support know at least one specific programme financed by the EU in their country (53%) and this figure has greatly increased since 2017 (up 18%).** Awareness of specific programmes is highest in Georgia (61%), Moldova (59%) and Ukraine (56%) – the three countries are indeed the main beneficiaries under the EU's European Neighbourhood Instrument. Around 40% of citizens in Armenia (40%), Azerbaijan (43%) and Belarus (37%) could also recall one or more programmes financed by the EU.
- **As in the previous waves, the most recalled programmes are those in the field of education (48%, up 6% since 2018).** These are in fact the most well-known in all EaP countries except Moldova, with peaks of acknowledgement in Azerbaijan (65%), Belarus (52%) and Ukraine (51%). As in 2018, the most cited projects in Moldova were those in the field of 'infrastructure development' (61%). It should also be noted that 32% of Ukrainians mentioned 'energy efficiency/global warming' programmes.
- Overall, around one third of EaP citizens think that all foreign institutions – except for the EEU – support their countries to the same extent as the EU. Around one third are also convinced that the IMF/World Bank are bigger providers of financial assistance than the EU; and around one tenth that this is the case for the UN and the United States. Conversely, 43% of EaP citizen feel that the Russian Federation supports their country less than the EU – the only exception being Belarus and Armenia, where 60% and 45% of the population is convinced that it is the other way around. Both countries have full membership in the EEU and display the highest levels of trust towards it.
- As in previous waves, the main positive effects of the EU's support (and closer integration with it) are the increase in 'tourism' – mentioned by 61% of the population – as well as the 'greater access to products and services' (56%), and the 'improved trade' (54%). Around 40% of citizens also acknowledged the positive effects on 'education' (42%), 'employment opportunities' (41%), 'law enforcement' (37%), 'infrastructure' (37%) and 'health-care' (36%).
- The increase in 'tourism' was well perceived in all countries and particularly in Georgia (85%), Azerbaijan (70%) and Armenia (68%). The appreciation of **'greater access to more products and services' and 'improved trade' has also increased since 2018 (up 7% and 6% respectively).**
- When asked to identify areas where they would like greater support from the EU, around one in two EaP citizens mentioned the **'economic development' (50%); and around one in three cited 'greater employment opportunities' (34%), 'reducing corruption' (32%) and/or 'improving the quality of the health-care system' (29%).** The promotion of 'economic development' is the most important area of intervention in Armenia (47%), Belarus (50%), Georgia (49%) and Ukraine (57%); Azerbaijanis would favour more support in 'promoting better education' and 'creating greater employment opportunities' (41% both), and Moldovans in 'tackling corruption', their utmost concern (52%).

Media usage as sources of information

- **Television continues to be the most popular source of information in EaP countries** – only 10% of citizens 'never' watch it – followed by 'word of mouth' – 20% 'never' rely on it – and new media, such as Internet – 39% 'never' access it – and social media – 44% 'never' use them. Print media are used by around one in two citizens (48%) and the radio by 39% of the population. As for the official EU website – 83% of residents of the EaP countries never use it, it was 86% in 2018.
- If language and ownership of the media are considered, **the vast majority of EaP citizens rely on their country's media in the national language (87%),** followed by the country's media in Russian (70%). Foreign media in Russian are also used by 47% of EaP citizens, and their usage is particularly common in Belarus (70%) and Armenia (61%) and Moldova (59%), where Russian TV channels are freely available. Media in other languages, be it the country's media or foreign media, are never used by around 80% of EaP citizens – with only around 10% relying on them 'always' or 'often' – and most popular in Armenia and Azerbaijan, where 25% of citizens 'frequently' rely on them.

- As in 2018, **‘word of mouth’ appears to be the most trusted source of information in EaP countries (57%)** and, particularly, in Belarus (79%). **Television is the second front runner (53%)** – with the highest levels of trust stated by Armenians (70%) and Georgians (69%). Between 40% and 50% of EaP citizens also **trust the Internet (49%)** and **social media (40%)**. Print media and the radio collect lower levels of trust compared to last year (33% and 28%, down 7% and 10% respectively). Trust in the official EU website is basically stable since 2018 (26% of EaP residents) – peaking in Ukraine at 30%.

Sources of information about the EU

- Around **half of the EaP citizens (54%) state they have seen or heard some information about the EU in last three months preceding the survey**. This finding is in line with last year and still very far from the 70% peak recorded during the 2016 wave and which can probably be linked to the entry in force of the DCFTA agreements in Moldova and Ukraine. Passive exposure continues to be particularly common in Moldova (79%) and Ukraine (59%), as well as in Belarus (54%). In Georgia and Armenia, over one third of citizens were reached by EU-related information (35% and 39% respectively); in Azerbaijan only one in five citizens (26%), though an increase of 7 percentage points was observed compared to 2018.
- **Over half of EaP citizens (53%) feel that ‘their national media represented the EU positively’**. A similar share of the population also thinks that the information they read, watch or access online helps them ‘very much’ or ‘fairly’ to have a better understanding of the EU (51%). Armenians (66%), Moldovans (66%) and Ukrainians (57%) are more likely to be satisfied with the quality of the EU-related information.
- No change was observed with regard to the levels of ‘active’ exposure to EU-related information across the EaP region compared to last year (49% of citizens look for or access it). In fact, only 16% of citizens access it ‘frequently’ or ‘very frequently’, with most citizens ‘never’ accessing it (51%) and around one third relying on ‘sporadic’ access (33%). Television and the Internet continue to be the main providers of EU-related information for citizens actively seeking information about the EU (57% and 53% respectively).
- As in 2018, Moldovans are the most likely to access information on the EU (68%, of which 29% ‘frequently’) – possibly due to the high figures of ‘passive’ exposure (79%). Levels of ‘active’ exposure have increased or remained mainly stable in Armenia, Georgia and Ukraine – where between 51% and 61% of the population looked for EU-related information either ‘frequently’ or ‘sporadically’. Around 40% of Azerbaijanis also engaged in EU-related searches – though less ‘frequently’ than last year (down 6%). In Belarus, only less than one in four citizens ‘frequently’ (3%) or ‘not very frequently’ (20%) access/search for information on the EU.
- **Half of ‘active searchers’ accesses EU-related information in their national language, 47% does so in Russian and 3% in English**, with no change compared to 2018. The usage of Russian is particularly common among Belarusians (99%) and Ukrainians (55%). On the contrary, nearly all Azerbaijanis (84%) and Georgians (82%) and 71% of both Armenians and Moldovans access information in their national language – with only between 10% and 25% using Russian and/or less than 10% English.
- Around one third of citizens actively seeking for information about the EU look for ‘general information about the EU’ (35%), ‘social and political news’ (33%), ‘economic news’ (29%) and ‘the EU relations with their home country’ (29%). Between 15% and 25% also search for information about ‘lifestyle in EU Member States’ (25%), ‘educational and cultural programmes’ (21%) and ‘opportunities offered by the EU’ (15%), while only 8% of EaP citizens who look for information about the EU are generally interested in ‘the EU’s relations with EaP countries’.

View of country's current situation

- Compared to 2018, **trust levels towards the different national institutions and political parties** have remained stable or recorded a slight increase. Nevertheless, they **remain overall very low – and the religious authority continues to be the only institution towards which trust exceeds distrust (48% versus 41%)**. Regional and local public authorities are the second front runners, trusted by 42% of EaP citizens – but distrusted by 50% –, followed by the government (36% versus a 58% distrust rate) and the parliament (31% versus 62%). Only 22% of EaP citizens trust their political parties.
- Nearly **60% of EaP citizens appear to be ‘not very’ (36%) or ‘not at all’ (22%) satisfied with the way democracy works in their country**, nevertheless reflecting a mildly more positive view compared to 2018 (34% of citizens are satisfied versus 29% last year). The increase in the overall level of satisfaction can be primarily linked to the change in attitudes of Armenians: 66% of the population is currently satisfied with the way democracy works in their homeland versus 26% in 2018.
- A slight improvement was also assessed in the path towards democratic governance; still the only two elements that most citizens feel apply to their country are ‘gender equality’ (62%, up 5% since 2017) and ‘freedom of speech’ (50%, up 7%). **‘Free and fair elections’, ‘rule of law’, ‘equality and social justice’, ‘independence of the judiciary’, ‘good governance’ were all assessed as much more ‘problematic’: around 60-65% of EaP citizens stated that they do ‘not really’ or ‘not definitely’ apply to their country**. The issue of ‘corruption’ is particularly critical – according to three quarters of citizens it does not ‘definitely’ (40%) or ‘not really’ (33%) apply to their country – outlining how all six EaP countries face challenges in addressing it.

Future expectations

- In line with the trend recorded at country level, **citizens of the EaP countries seem to be slightly more optimistic towards their own future (58%) than to the future of their country (48%)** – and slightly more optimistic about both compared to 2018 (up 2% and 3% respectively). Expectations are mostly stable in Ukraine, Moldova and Georgia – where between 54% and 72% of citizens are optimistic towards their personal future and between 45% and 59% towards the future of their country. Belarusians seem slightly more concerned about the future of their country (59% are pessimistic versus 54% in 2018); while Azerbaijanis (68%) and, particularly, Armenians (70%) are much more optimistic about their country's future, reflecting their hopes in the new country's leadership.
- As in 2018, **‘low living standards and poverty’, ‘unemployment’ and ‘low salaries and pensions’ appear to be the most pressing concern for around 40% of the population**, possibly due to the contextual economic situation of many EaP countries. In addition, the memory of the 2014-15 crisis is still very close and around one third of citizens are worried about ‘the economic crisis’. Around 30% of EaP citizens also mentioned ‘security issues and war’ (28%) and 10% ‘territorial conflicts’ – and more so in Ukraine, Azerbaijan, Georgia and Armenia. In addition to ‘low salaries and pensions’, Moldovans' priority remains the widespread issue of ‘corruption’ (47%).

Profiling attitudes towards the EU: positive versus neutral

- **Citizens with a positive view of the EU account for over half of EaP citizens (52%, up 6% since 2018)**. They tend to be slightly more concentrated among the younger age groups (41%), the most educated (40%) and the bigger cities' residents (39%). They are also more likely to be native speakers of their national language (78%). Conversely ‘neutral’ citizens - who account for around one third of the population (34%, down 3%) – are more likely to be females (60%), elderly (36%), have a lower level of education (71%), live in smaller settlements (51%) and be native Russian speakers (36%).
- Levels of ‘active’ and ‘passive’ exposure to EU-related information as well as the type and the language of the media ‘frequently’ used are strong characterising factors in profiling attitudes:

64% of EU supporters have seen or heard information about the EU and/or have looked for/accessed information on the EU (versus 46% and 35% for 'neutral' citizens). In addition, 62% are 'frequent' users of new media and 26% of 'traditional media only' (versus 46% and 42% for 'neutral' citizens).

- If searching for EU-related information, 55% of EU supporters use their national language, 41% Russian and 4% English – versus 39%, 59% and 2% of 'neutral' citizens. While EU supporters appear to be slightly more interested in 'economic news' (33%), 'the EU relations with their home country' (32%) 'lifestyle in the EU' (28%) and 'education and cultural programmes' (23%), 'neutral' citizens are mainly interested in 'general information on the EU' (37%) and/or 'social and political news' (33%), displaying lower levels of interest for all other EU-related information.
- Levels of exposure impact on all other perceptions. In fact, EU supporters share a higher level of confidence in all foreign institutions – whereas, for 'neutral' individuals, trust prevails over distrust only for the EU – and a much stronger and more positive vision of the EU and its financial support. **Only 44% of 'neutral' EaP citizens trust the EU**, 60% describe the relations between their country and the EU as 'good', 46% acknowledge EU's financial support and 39% of those aware of the EU support consider it as effective (versus respectively 80%, 83%, 66% and 59% among EU supporters).
- When it comes to the assessment of common beliefs, 'neutral' individuals are again less positive than EU supporters – their level of agreement to all statements does not exceed 57% (versus 85% for EU supporters). The highest share of approval was recorded for the statements that 'the EU is an independent actor in foreign relations'; at the opposite end, **only 40% of neutrally oriented citizens agreed with the fact that 'the EU fosters the preservation of traditional values in our society'**. Given that 'neutral' citizens are more likely to be users of Russian media, it is highly probable that they are more influenced by the anti-western narrative disseminated by these media than EU supporters.
- **'Neutral' citizens are** also less 'optimistic' towards their personal future and particularly the future of their country (49% are 'not optimistic' versus 44% of EU supporters). In fact, they seem **much more concerned about the current economic situation and all related issues, such as 'low salaries and pensions', 'low living standards and poverty', 'unemployment' and 'the economic crisis', 'high prices and taxes' and 'the unaffordability of the healthcare'**.

3.2. Perceptions of the European Union

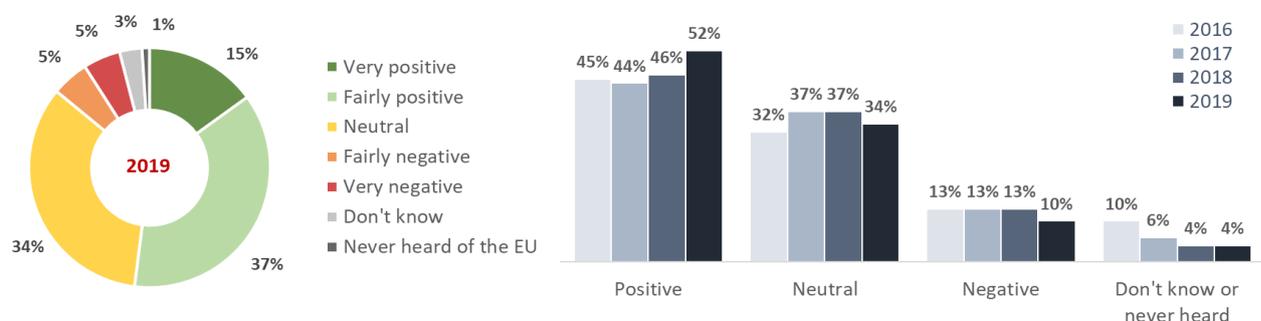
Over half of EaP citizens have a positive image of the European Union (52%), 34% feel neutral about it and only 10% hold a negative view. Awareness of the EU is also very high and only 4% of people are not aware of or have never heard about the EU. The increase in the number of EU-supporters was recorded across all six EaP countries – and particularly in Armenia (62%, up 14%). The EU is the most trusted international institution and the only one trusted by the majority of EaP citizens (58%), confirming the finding that sees it ‘strongly’ associated with all positive values. At country level, the EU enjoys the highest levels of trust in Georgia (71%) and the lowest in Azerbaijan (35%). Around 70% of EaP citizens also believe that relations between their country and the EU are ‘good’ (67%) and around 50% are aware of the financial support provided by the EU to their countries. In fact, most EaP citizens are confident that ‘the EU provides tangible benefits to citizens in their everyday lives’ and more so compared to 2018 (65%, up 6%). As in previous waves, the main positive effects of the EU’s support (and closer integration with it) are the increase in ‘tourism’ – mentioned by 61% of the population – the ‘greater access to products and services’ (56%), and the ‘improved trade’ (54%).

3.2.1. General perceptions of the EU

Around half of the population of the six EaP countries has a positive image of the European Union; around one third has a neutral stance (34%) and only one tenth (10%) feels negative about it. **Perceptions are the most positive since 2016 (52%, up 7 percentage points) and the awareness of the EU is also very high – only 4% of the EaP population is ‘not aware of’ or has ‘never heard about the EU’ (down 6% since 2016).**

The increase in the number of EU-supporters was recorded across all six EaP countries – and particularly in Armenia (62%, up 14% since 2018), where the consequences of the Velvet Revolution produced significant shift in attitudes towards the country’s institutions as well as the EU. Remarkable increases in positive perceptions were also observed in Ukraine (56%, up 7%), Moldova (55%, up 7%) and Azerbaijan (46%, up 7%) – where still 15% of citizens are ‘not aware of’ or ‘have never heard about the EU’⁵. As in 2018, Belarusians account for the lowest share of positively-oriented citizens (36%, up 2%), with as much as 53% of the population neutrally-oriented and 9% negative. The situation is stable in Georgia, with one in two citizens who feel positive about the EU (50%, up 1%).

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



⁵ As in previous waves, the high share of citizens who ‘are not aware of’ or ‘have never heard about the EU’ can be linked to the low levels of ‘passive’ exposure to information on the EU that was recorded in Azerbaijan. In fact, only 26% of citizens said that they had heard about the EU in the three months preceding the survey – which is much lower than in the other EaP countries.

FIGURE 2 – Do you have a ‘very positive’, ‘fairly positive’, ‘neutral’, ‘fairly negative’ or ‘very negative’ image of the European Union? (Q2.1) – Country specific picture

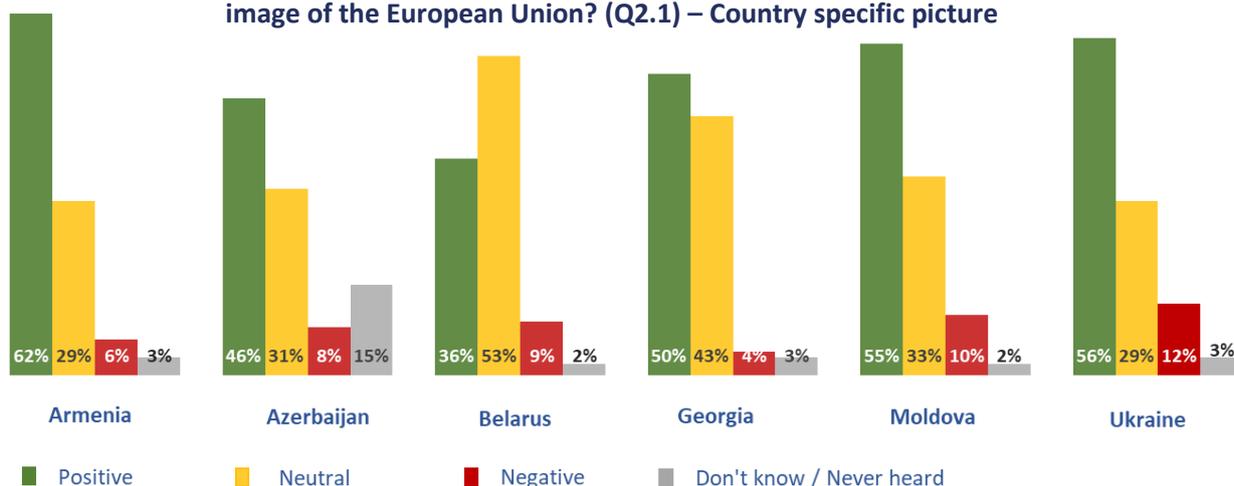


Figure 3 provides the rating of the values which are ‘strongly’ and ‘very strongly’ associated with the EU and that are most important at a personal level⁶. **For the fourth year in a row, ‘peace, security and stability’ is the primary value for 65% of the overall population**, reflecting the challenging geo-political position of EaP countries. In fact, aside from Moldovans – whose primary personal value is ‘absence of corruption’ – nearly three quarters of Ukrainians (73%) and over half of Belarusians (60%), Armenians (58%), Georgians (55%) and Azerbaijani (52%) mentioned it. At the same time, 72% of the EaP population ‘strongly’ or ‘very strongly’ associated ‘peace, security and stability’ with the EU, despite the latter not being a security alliance nor a military power. This strong association – which has gained another 5 percentage points compared to 2018 – reveals how EaP citizens perceive the EU as a solid interlocutor able to support the EaP countries in easing tensions in the region, sustaining their territorial integrity and resolving frozen conflicts and territorial disputes⁷.

‘Human rights’ and ‘economic prosperity’ are second (39%) and third (34%) front runners as personal values; while ‘freedom of the media’, ‘respect for other cultures’ and ‘freedom of religion’, on the other hand, were the least frequently mentioned (all by less than 10% of EaP citizens).

As in previous waves, **most of the population tend to associate the EU with all values – especially ‘human rights’ and ‘economic prosperity’ (80% both)** – showing how EaP citizens, in general, well acknowledge the positive economic and democratic climate prevailing in the EU. For the third year in a row, ‘absence of corruption’ has the lowest level of positive associations, although 61% (up 3% since 2018) of EaP citizens link it ‘strongly’ or ‘very strongly’ with the EU⁸.

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

⁷ There are a number of ‘frozen’ conflicts in the EaP region, which affect their relationship with Russia as well as their international relationship with the EU and NATO. The five ‘problematic’ regions are: Crimean Peninsula and Eastern Ukraine (Donetsk and Lugansk regions), Transnistria in Republic of Moldova, Abkhazia and South Ossetia in Georgia, Nagorno-Karabakh in Armenia and Azerbaijan. When explicitly asked if ‘integration with the EU will increase the country’s security and stability’, 67% of EaP citizens strongly or somewhat agreed (up 3% since 2018).

⁸ In fact, the EU’s contribution in tackling corruption was well acknowledged by most of EaP citizens. When explicitly asked if ‘the EU is committed to fighting corruption’, 66% of EaP citizens ‘strongly’ or ‘somewhat’ agreed with the proposed statement, peaking at 75% in Ukraine.

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

(Percentages refer to citizens who have heard of the EU)



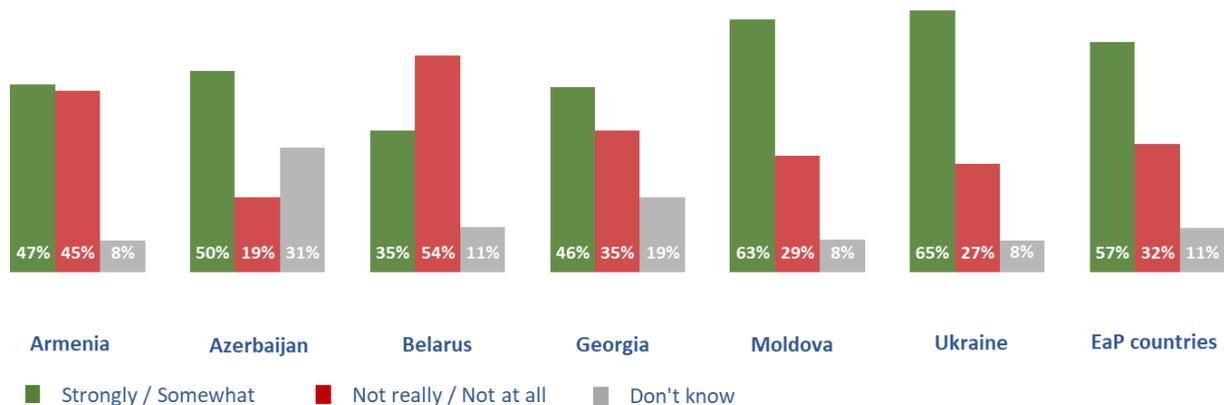
Values strongly associated with the EU

Most important personal values

Most EaP citizens are also confident that ‘the EU fosters the preservation of traditional values in [their] society’ (57%, up 1% since 2018)⁹. Ukrainians (65%) and Moldovans (63%) are those more inclined to agree with the statement – with only less than 30% of citizens in open disagreement. Armenians seem fairly equally split between agreement (47%) and disagreement (45%), whereas Georgians and, particularly, Belarusians – who are the most neutral towards the EU – are less likely to view the EU as preserving traditional values (46% and 35% respectively). One in two Azerbaijanis tend to agree with the statement (50%), with the rest of the population unaware (31%) or in open disagreement (19%).

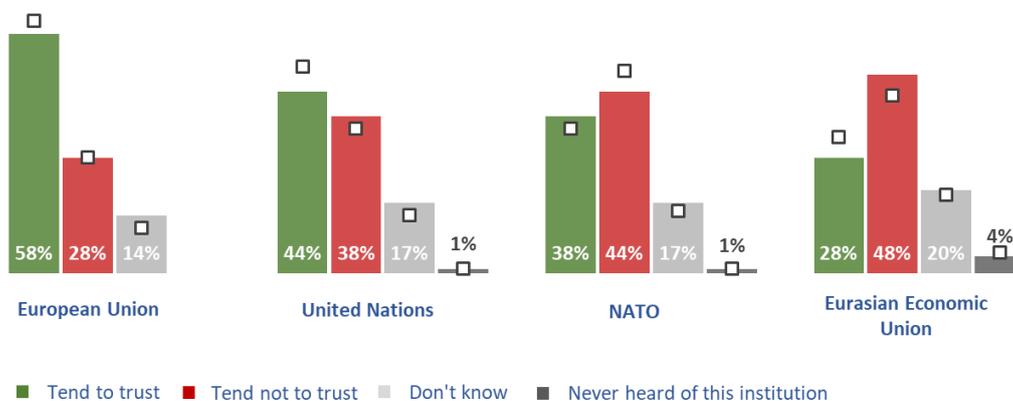
⁹ The third wave saw the introduction of a new set of questions, targeted at gaining greater insights into how the Union is perceived by citizens. Respondents were asked to rate their agreement with the following set of statements according to a five-grade scale (‘strongly’, ‘somewhat’, ‘not really’, ‘not at all’, or ‘don’t know’): ‘the EU fosters the preservation of traditional values in our society’, ‘the EU provides tangible benefits to citizens in their everyday lives’, ‘the EU is committed to fighting corruption’, ‘the EU is an independent actor in foreign relations’ and ‘integration with the EU increases the country’s security and stability’.

FIGURE 4 – ‘The EU fosters the preservation of traditional values in our society.’
To what extent do you agree with this statement about the EU?
(Percentages refer to citizens who have heard of the EU)



The EU is the most trusted foreign institution and the only one trusted by the majority of EaP citizens (58%), confirming the finding that sees it ‘strongly’ or ‘very strongly’ associated with all positive values. A decrease of around 5 percentage points in the levels of trust was observed with regard to the UN (44%) and the EEU (28%) – which remains the least trusted foreign institution in the EaP region. As for NATO, despite the fact that distrust still exceeds trust (44% versus 38%), EaP citizens seem slightly more positively disposed towards it than in 2018 (up 3%).

FIGURE 5 – Trust towards different institutions (Q2.11)
(Percentages refer to citizens who have heard of the EU)



At country level, the EU is the most trusted international institution in all EaP countries. More specifically, Georgia is the clear frontrunner in this respect (71%), followed shortly by Moldova (65%), Ukraine (63%) and Armenia (61%). Trust levels are somewhat lower in Belarus, still most citizens are confident the EU (51%, up 4% since 2018). As for Azerbaijan, trust levels in the country are generally very low – and even lower than in 2018 – due to a widespread unfamiliarity with the role of foreign institutions: between 34% and 47% of the population did not answer the question or ‘had never heard of them’. As a result, the EU scored a 35% level of trust, the UN and the EEU a 25% level of trust and the NATO a minimal 20%. Belarusians, Moldovans and Armenians are also mainly not confident in the NATO (only 19%, 30% and 31% of citizens respectively have trust in it), as opposed Ukrainians (45%) and particularly Georgians (55%). The highest levels of trust towards the EEU were recorded in Belarus (48%) and Armenia (46%): both countries have full membership.

TABLE 1 – Trust towards different institutions (Q2.11)

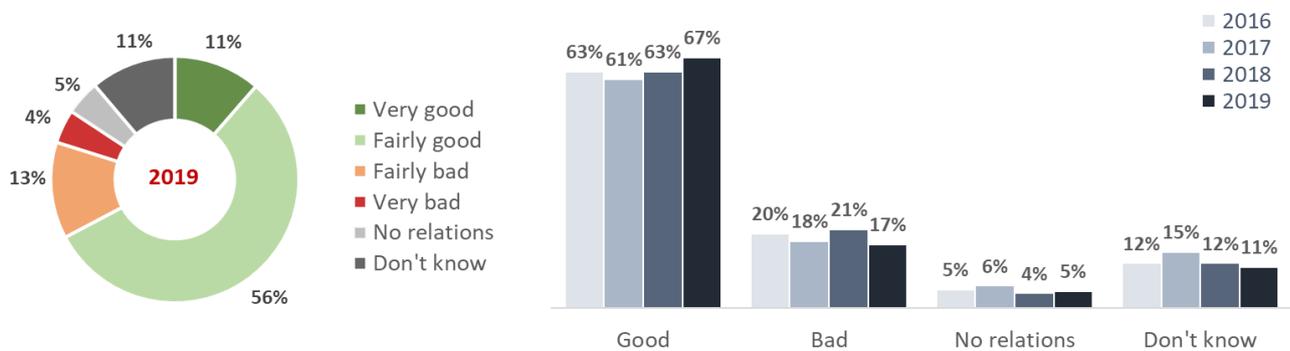
Q2.11. I would like to ask you a question about how much trust you have in certain institutions. (Percentage of the population who answered 'tend to trust')							
	Armenia	Azerbaijan	Belarus	Georgia	Moldova	Ukraine	EaP Countries
European Union	61%	35%	51%	71%	65%	63%	58%
United Nations	52%	25%	47%	56%	42%	45%	44%
NATO	31%	20%	19%	55%	30%	45%	38%
Eurasian Economic Union	46%	25%	48%	23%	35%	22%	28%

Percentages refer to EaP citizens who have heard of the EU

3.2.2. EU relations with EaP countries and awareness of EU financial support

Nearly 70% of EaP citizens believe that relations between their country and the EU are 'good' (67%). The remaining population is nearly equally split between those who believe the relations to be 'bad' (17%) and those who did not comment on the quality of the relations (11%) or 'were not aware of them' (5%). Findings are more optimistic than in 2018 (up 4%), reflecting the increase in positive perceptions towards the EU.

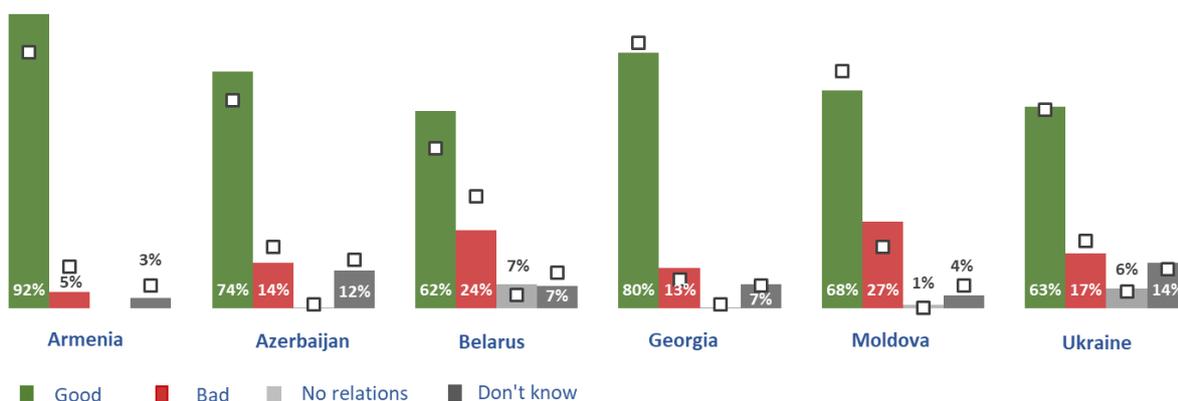
FIGURE 6 – In general, how would you describe the relations that the European Union has with your country? (Q2.4) – Regional overview
(Percentages refer to citizens who have heard of the EU)



Residents of Armenia (92%, up 12%) perceive the relationship between the EU and their countries in the most positive light and much more so compared to 2018. A more positive trend was also recorded in Belarus (62%, up 12%) and Azerbaijan (74%, up 9%). Perceptions are stable in Ukraine (63%, up 1%) and only slightly less positive in Georgia (80%, down 3%) and particularly Moldova (68%, down 6%), where around one third of the population are convinced that the relations between their country and the EU are 'bad' (27%, the highest figure of all EaP countries). It should also be noted that between 12% and 20% of Azerbaijanis, Belarusians and Ukrainians did not comment on the quality of the relations or 'were not aware of them'.

FIGURE 7 – In general, how would you describe the relations that the European Union has with your country? (Q2.4) – Country specific picture

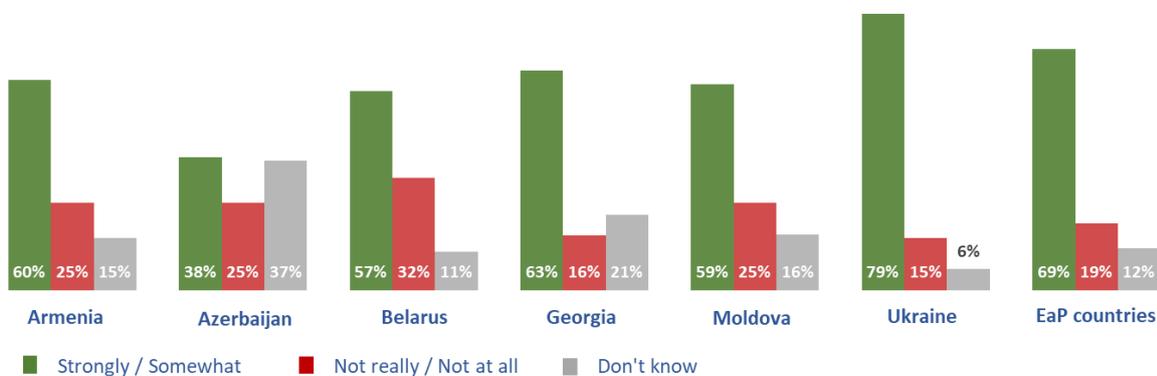
(Percentages refer to citizens who have heard of the EU)



Most EaP citizens are confident that ‘the EU is an independent actor in foreign relations’ (69%, up 4% since 2018).¹⁰ One in five (19%) do not agree with this statement and one in ten (12%) do not have a definite opinion. As in 2018, Ukrainians are those more inclined to agree with the statement – with only 15% of citizens in open disagreement (down 9% since 2018) and 6% not commenting on the statement. Levels of agreement are also high among Armenians, Belarusians, Georgians and Moldovans – between 57% and 63% of citizens are convinced that ‘the EU is an independent actor in foreign relations.’ In fact, only Azerbaijanis display low levels of agreement (38%). Azerbaijanis are also the most unaware/undecided on the issue, with 37% of the population not providing a definite answer.

FIGURE 8 – ‘The EU is an independent actor in foreign relations’. To what extent do you agree with this statement about the EU?

(Percentages refer to citizens who have heard of the EU)

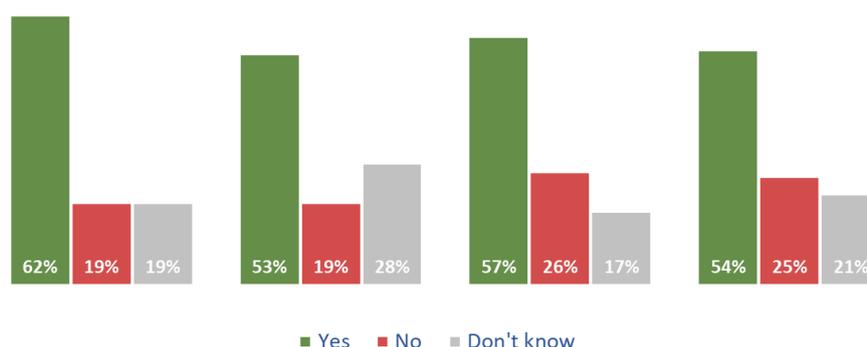


No significant change was observed with regard to the share of EaP citizens who are aware of the EU’s financial support. Currently **54% of the overall population knows that the EU supports their country** (it was 57% in 2018); 25% is convinced that this is not the case and 21% is basically unaware of it.

¹⁰ The third wave saw the introduction of a new set of questions, targeted at gaining greater insights into how the Union is perceived by citizens. Respondents were asked to rate their agreement with the following set of statements according to a five-grade scale (‘strongly’, ‘somewhat’, ‘not really’, ‘not at all’, or ‘don’t know’): ‘the EU fosters the preservation of traditional values in our society’, ‘the EU provides tangible benefits to citizens in their everyday lives’, ‘the EU is committed to fighting corruption’, ‘the EU is an independent actor in foreign relations’ and ‘integration with the EU increases the country’s security and stability’.

FIGURE 9 – As far as you know, does the European Union provide your country with financial support? (Q2.5)

(Percentages refer to citizens who have heard of the EU)



Ukrainians (57%, down 3%), Armenians (71% up 2%), Georgians (74%, up 7%) and particularly Moldovans (85%, down 2%) tend to acknowledge the EU's financial support more frequently compared to Belarusians (37%, down 7%) and Azerbaijanis (28%, down 1%). Moreover, 42% of Belarusians and 33% of Azerbaijanis do not recognise the EU's financial support. While in Belarus this finding may be related with the slow progress on the consolidation of strategic relations and partnership with the EU, which, in turn, affected the launch of approved projects and programmes in the country (the acknowledgement decreased by 7% since 2018); in Azerbaijan a shift from negative answers (33%, down 7% since 2018) to unawareness has been recorded and currently 39% of the populations was unable to provide a definite answer to this question.

TABLE 2 – Provision of financial support by the EU

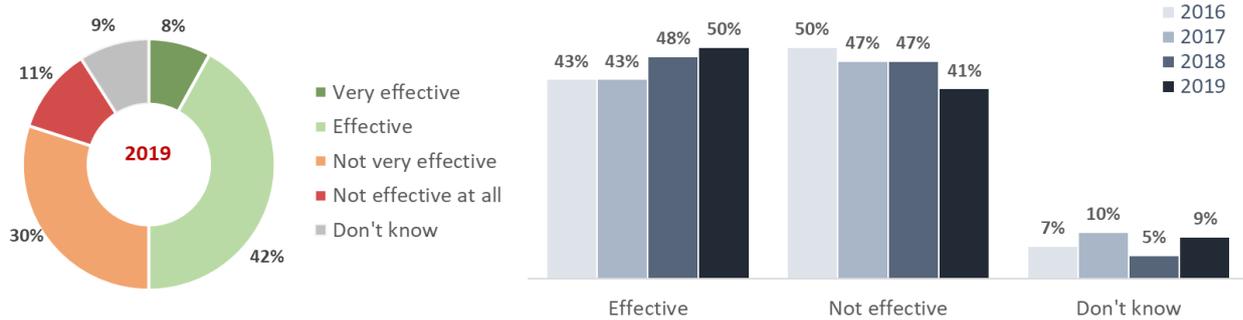
Q2.5. As far as you know, does the European Union provide your country with financial support?							
	Armenia	Azerbaijan	Belarus	Georgia	Moldova	Ukraine	EaP Countries
Yes	71%	28%	37%	74%	85%	57%	54%
No	17%	33%	42%	5%	7%	23%	25%
Don't know	12%	39%	21%	21%	8%	20%	21%
Total	100%	100%	100%	100%	100%	100%	100%

Percentages refer to citizens who have heard of the EU

As for the effectiveness of financial support, a slight increase in positive opinions was observed compared to last year (50%, up 2 % since 2018) in line with the upward historical trend (up 7% since 2016). Around 40% of EaP citizens aware of the EU's financial support still do not acknowledge the positive effects of it (41%, down 6% since 2018 and 9% since 2016); while only 9% of citizens could not come up with a definite answer.

FIGURE 10 – How effective do you think the support has been? (Q2.5.1) – Regional overview

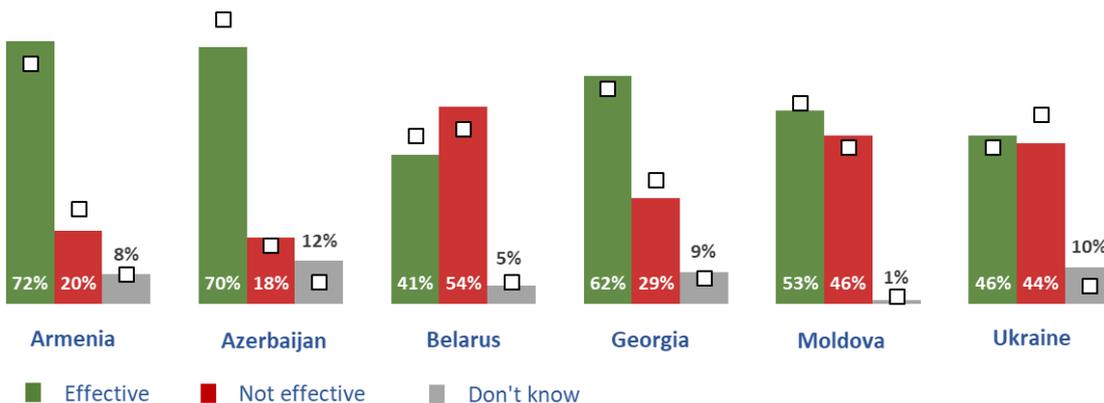
(Percentages refer to citizens who were aware of the EU’s financial support)



Among those who are aware of the EU’s financial support, perceptions on its effectiveness were the most positive in Armenia (72%), Azerbaijan (70%) and Georgia (62%). Around one in two Moldovans (53%) also consider the EU’s financial support ‘effective’ (versus 46% of citizens who do not); whereas Ukrainians are basically split (46% versus 44%), though a shift from negative perceptions to unawareness was observed compared to last year. In fact, only in Belarus, the majority of citizens who are aware of the EU’s financial support deem it ‘not effective’ (54%) and more so compared to last year (up 6%).

FIGURE 11 – How effective do you think the support has been? (Q2.5.1) – Country specific picture

(Percentages refer to citizens who were aware of the EU’s financial support)

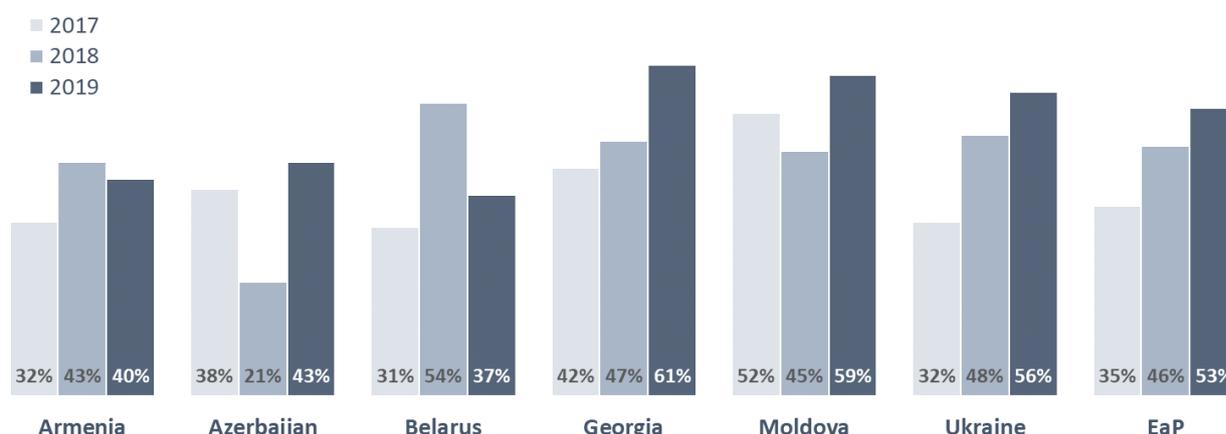


Over half of EaP citizens who are aware of the EU’s financial support know at least one specific programme financed by the EU in their home country (53%) and awareness has greatly increased since 2017 (up 18%). Awareness of specific programmes is highest in Georgia, Moldova and Ukraine – the three countries are indeed the main beneficiaries under the EU’s European Neighbourhood Instrument. In 2017, Georgia and Moldova were also the leading EaP country as beneficiary of development assistance from multiple EU sources, while Ukraine was the leading recipient when it came to macroeconomic assistance from the EU¹¹. Around 40% of citizens in Armenia (40%), Azerbaijan (43%) and Belarus (37%) could recall one or more programmes financed by the EU.

¹¹ See Eastern Partnership Index 2017, Charting Progress in European Integration, Democratic Reforms, and Sustainable Development Eastern Partnership Civil Society Forum, 2018, <https://eap-csf.eu/eastern-partnership-index/>

FIGURE 12 – Do you know of any specific programmes financed by the European Union in your country? (Q2.6) – Percentage of ‘Yes’ responses

(Percentages refer to citizens who were aware of the EU’s financial support)



As in previous waves, **the most recalled programmes are in the field of education** (48%, up 6% since 2018). These are in fact the most recognised programmes in all EaP countries except Moldova, with peaks of acknowledgement in Azerbaijan (65%), Belarus (52%) and Ukraine (51%). In fact, EaP countries are participating in/benefiting from many EU programmes, such as Creative Europe and Horizon 2020, and exchanges between the EU and EaP countries continue to flourish due to Mobility Partnership Programmes – the introduction of visa-free travel has also impacted on student and academic mobility. ‘Health and medicine programmes’ – the second front runners – were mentioned by 37% of EaP citizens; followed by programmes in the field of ‘infrastructure development’ (26%), ‘culture’ (24%), ‘economic reforms/business promotion’ (23%), ‘energy efficiency and global warming’ (23%), ‘justice/police reforms’ (21%) and ‘agricultural and rural development’ (19%). As in 2018, the most cited projects in Moldova were those in the field of infrastructure development (61%). It should also be noted that 32% of Ukrainians mentioned ‘energy efficiency/global warming’ programmes – possibly due to the signature of two energy efficiency deals with the EU and the European Investment Bank, and the start of the Climate Innovation Vouchers Program funded by the EU and the European Bank of Reconstruction and Development¹².

As for personal involvement with an EU-funded project in the past twelve months, only 4% of EaP citizens were personally involved, with no significant difference between individual countries.

FIGURE 13 – Which specific programme(s) do you know? (Q2.6.1, multiple answers possible)

(Percentages refer to citizens who were aware of specific programmes financed by the EU)



Residents of EaP countries were also asked to compare the support provided by different international donors with the support provided by the EU. The first thing that should be noted is that the level of

¹² More details about country data are provided in Annex, Table A1.

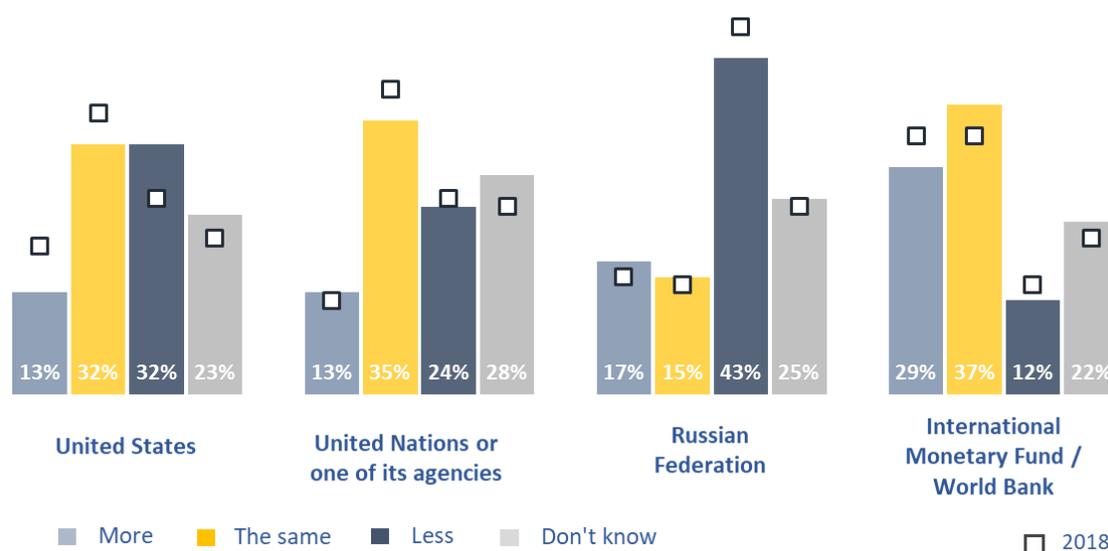
confidence in answering the question – measured by the share of individuals who did not provide a definite answer – continues to be quite low as between 22% and 28% of EaP citizens answered ‘don’t know’¹³. Secondly, compared to 2018, the level of confidence slightly decreased for the UN and the United States, while it slightly increased or remained stable for the Russian Federation and the IMF/World Bank.

Overall, around one third of EaP citizens thinks that all foreign institutions – except for the Russian Federation – support their countries to the same extent as the EU. Around one third are also convinced that the IMF/World Bank are bigger providers of financial assistance than the EU; and around one tenth that this is also the case for the UN and the United States. Conversely, 43% of EaP citizen feel that the Russian Federation supports their country less than the EU – the only exception being Belarus and Armenia, where 60% and 45% of the population is convinced that it is the other way around. As previously noted, both countries have full membership in the EEU and display the highest levels of trust towards it.

In line with the finding that sees only 28% of Azerbaijanis aware of the fact that the EU financially sustains their country, between 51% and 61% of them could not rate the extent of EU support in comparison to that provided by other international organisations (it was around 50% in 2018).

FIGURE 14 – 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 citizens who have heard of the EU)



Most EaP citizens are confident that ‘the EU provides tangible benefits to citizens in their everyday lives’ and more so compared to 2018 (65%, up 6%)¹⁴. Around one in four (25%, down 5%) do not agree with the statement and one in ten (10%) do not have a definite opinion.

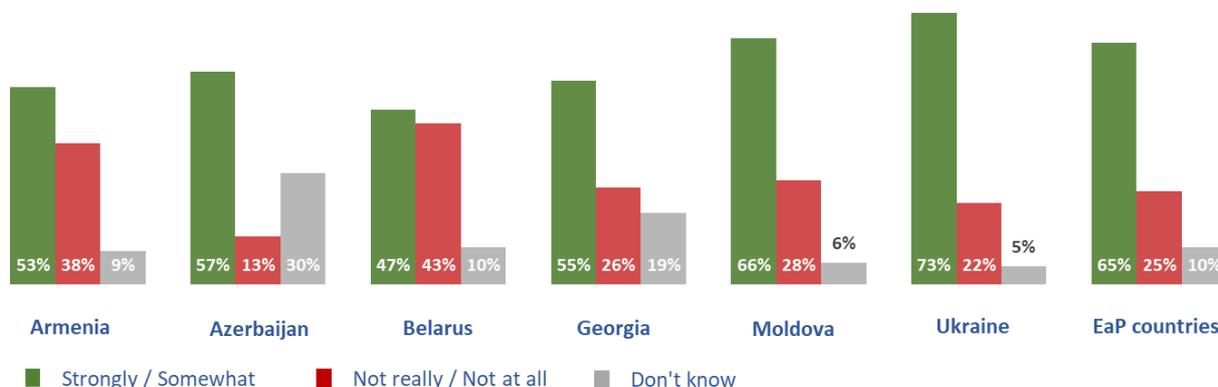
Levels of agreement are quite high in all EaP countries (between half and three quarters of the citizens agreed with the statement), with peaks of 73% in Ukraine and 66% in Moldova. In fact, only in Armenia and Belarus around 40% of citizens expressed open disagreement (38% and 43% respectively). As for Belarus, levels of strong disagreement are in fact lower than those noted in 2018 (down 6%), whereas ‘milder’ disagreement is more widespread (up 8%), reflecting the generally ‘neutral’ and ‘cautious’

¹³ More details about country data are provided in Annex, Table A2.

¹⁴ The third wave saw the introduction of a new set of questions, targeted at gaining greater insights into how the Union is perceived by citizens. Respondents were asked to rate their agreement with the following set of statements according to a five-grade scale (‘strongly’, ‘somewhat’, ‘not really’, ‘not at all’, or ‘don’t know’): ‘the EU fosters the preservation of traditional values in our society’, ‘the EU provides tangible benefits to citizens in their everyday lives’, ‘the EU is committed to fighting corruption’, ‘the EU is an independent actor in foreign relations’ and ‘integration with the EU increases the country’s security and stability’.

attitude of Belarusians. It should also be noted that Azerbaijanis are again the most unaware/undecided on the issue, with 30% of the population not providing a definite answer.

FIGURE 15 – ‘The EU provides tangible benefits to citizens in their everyday lives’.
To what extent do you agree with this statement about the EU?
(Percentages refer to citizens who have heard of the EU)



As in previous waves of the survey, the main positive effects of the EU’s support are the increase in ‘tourism’ – mentioned by 61% of the population – as well as the enlargement of consumer market, meant as ‘greater access to products and services’ (56%), and ‘trade’ (54%). Around 40% of citizens also acknowledged the positive effects on ‘education’ (42%), ‘employment opportunities’ (41%), ‘law enforcement’ (37%), ‘infrastructure’ (37%) and ‘health-care’ (36%).

The increase in ‘tourism’ was well perceived in all countries and particularly in Georgia (85%, up 4% since 2018), Azerbaijan (70%, up 5%) and Armenia (68%, stable).. The appreciation of ‘greater access to more products and services’ and ‘improved trade’ has also recorded an increase since 2018 (up 7% and 6% respectively) confirming the importance of the EU as a key partner of the EaP countries in the trade of services and, particularly, goods¹⁵. In fact, in all countries except Georgia and Moldova over half of the population mentioned both areas¹⁶. The positive effect on ‘education’ (42%, up 3%) was particularly well perceived in Armenia and Azerbaijan, where nearly 60% of citizens are convinced that the EU’s support impacted ‘fairly’ or ‘very much’ on the quality of education – again possibly due to the increase in the awareness of education programmes financed by the EU.

EaP citizens were also asked to identify areas where they would like greater support from the EU¹⁷. As in 2018, around one in two EaP citizens mentioned the ‘economic development’ (50%); and around one in three cited ‘greater employment opportunities’ (34%), ‘reducing corruption’ (32%) and ‘improving the quality of healthcare system’ (29%). While the promotion of ‘economic development’ seems the most important area of intervention in Armenia (47%), Belarus (50%), Georgia (49%) and Ukraine (57%); Azerbaijanis would primarily favour a stronger support from the EU in ‘promoting better education’ (41%) and ‘creating greater employment opportunities’ (41%), and Moldovans seem more interested in the EU’s support in ‘tackling corruption’ (52%)¹⁸.

¹⁵ In terms of goods, the EU was the largest partner for four out of six countries, namely for Azerbaijan, for which the EU is a large energy consumer, and for Ukraine, Moldova and Georgia, which are all implementing Association Agreements, incorporating Deep and Comprehensive Free Trade Area (DCFTAs), with the EU. For Belarus and Armenia, members of the Eurasian Economic Union (EAEU), the EU is the second largest trading partner after Russia. In terms of services, the EU is a dominant partner for Moldova, and important partner for Ukraine and Belarus, but less so for South Caucasus countries due to the absence of a direct land border. See Eastern Partnership Index 2017, Charting Progress in European Integration, Democratic Reforms, and Sustainable Development Eastern Partnership Civil Society Forum, 2018, <https://eap-csf.eu/eastern-partnership-index/>

¹⁶ More details about country data are provided in Annex, Table A3.

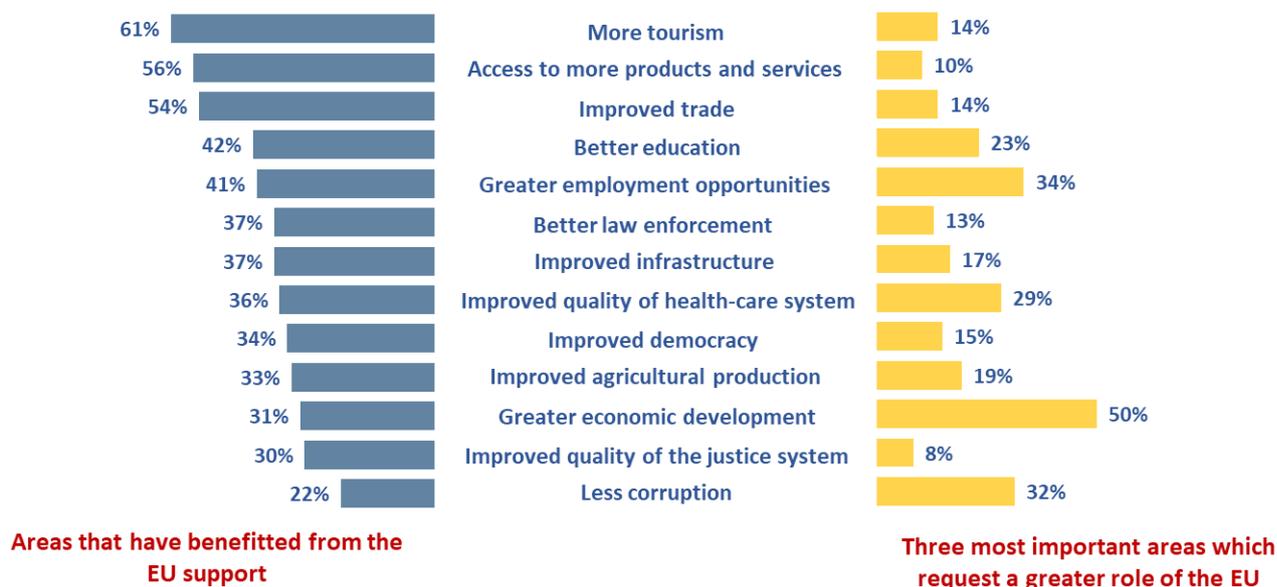
¹⁷ Respondents were asked to name and rank the three most important areas in which the EU should play a greater role.

¹⁸ More details about country data are provided in Annex, Table A4.

It is worth noting that 40% of Ukrainians also mentioned it and that EU’s contribution to fighting corruption was seen as the least effective for the third year in a row: only 22% of the EaP citizens mentioned it as an area that had benefitted from EU support - although an increase of 3 percentage points was recorded compared to 2018.

FIGURE 16 – Areas that have benefitted ‘very much’ or ‘fairly’ from EU support (Q2.8) & three most important areas in which citizens request a greater role of the EU (Q2.9)

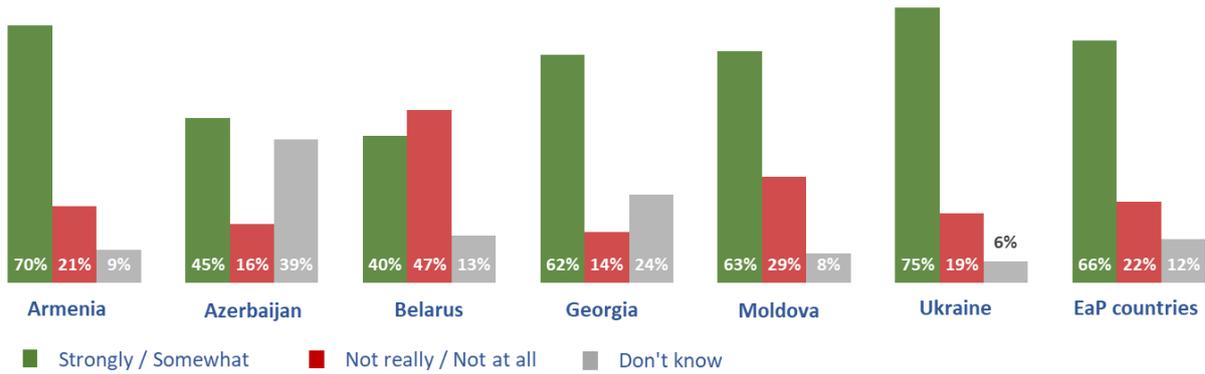
(Percentages refer to citizens who have heard of the EU)



Nevertheless, when directly asked if ‘the EU is committed to fighting corruption’, most EaP citizens provided a positive answer (66%)¹⁹ – with peaks among Ukrainians (75%) and Armenians (70%). This finding suggests that, even if one third of EaP citizens would favour more support from the EU in tackling corruption, nevertheless they do acknowledge the EU’s commitment in this regard. As for other common beliefs, Azerbaijanis provided the highest level of ‘don’t know’ responses (39%) attesting a level of unawareness of the EU, and all related issues and perceptions, which is much higher than in the other EaP countries.

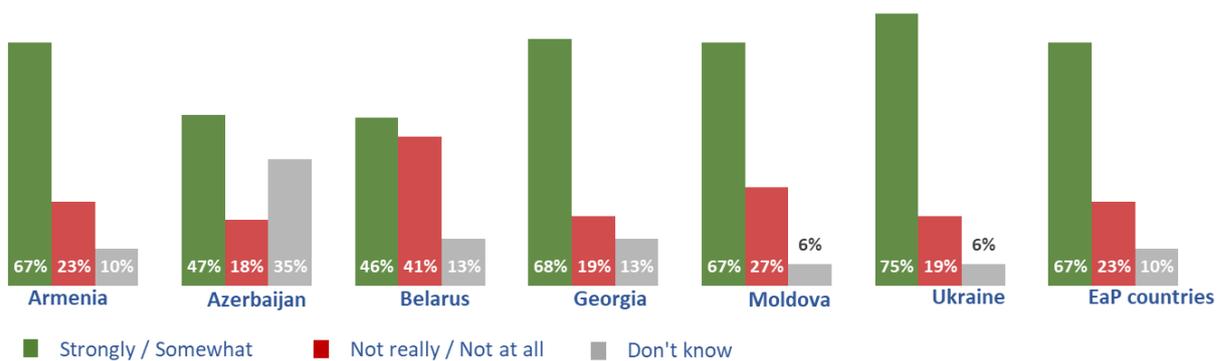
¹⁹ The third wave saw the introduction of a new set of questions, targeted at gaining greater insights into how the Union is perceived by citizens. Respondents were asked to rate their agreement with the following set of statements according to a five-grade scale (‘strongly’, ‘somewhat’, ‘not really’, ‘not at all’, or ‘don’t know’): ‘the EU fosters the preservation of traditional values in our society’, ‘the EU provides tangible benefits to citizens in their everyday lives’, ‘the EU is committed to fighting corruption’, ‘the EU is an independent actor in foreign relations’ and ‘integration with the EU increases the country’s security and stability’.

FIGURE 17 – ‘The EU is committed to fighting corruption’.
To what extent do you agree with this statement about the EU?
(Percentages refer to citizens who have heard of the EU)



Most EaP citizens are also confident that ‘integration with the EU increases the country’s security and stability’ (67%, up 3%)²⁰ – with only one in four citizens (23%) are not agreeing with the statement and one in ten (10%) do not have a definite opinion. Considering that the whole region is faced with many security challenges and ‘peace, security and stability’ is indeed the primary personal value for 65% of the EaP population, this finding shows how more EaP citizens each year perceive the EU as a strong safeguard with regard to their territorial integrity and peaceful existence. In fact, only in Belarus and Azerbaijan less than one in two citizens supports the statement: Belarusians seem nearly equally split between agreement (46%) and disagreement (41%), while Azerbaijanis are again the most unaware/undecided (35%).

FIGURE 18 – ‘Integration with the EU increases the country's security and stability’.
To what extent do you agree with this statement about the EU?
(Percentages refer to citizens who have heard of the EU)



²⁰ The third wave saw the introduction of a new set of questions, targeted at gaining greater insights into how the Union is perceived by the citizens. Respondents were asked to rate their agreement with the following set of statements according to a five-grade scale (‘strongly’, ‘somewhat’, ‘not really’, ‘not at all’, or ‘don’t know’): ‘the EU fosters the preservation of traditional values in our society’, ‘the EU provides tangible benefits to citizens in their everyday lives’, ‘the EU is committed to fighting corruption’, ‘the EU is an independent actor in foreign relations’ and ‘integration with the EU increases the country's security and stability’.

3.3. Sources of information on the EU

*As in 2018, most EaP citizens have seen or heard information about the EU in the last three months (54%); and 'passive' exposure continues to be particularly common in Moldova (79%), Ukraine (59%) and Belarus (54%). Levels of 'active' exposure across the EaP region are also stable (49%, of which 16% 'frequent' and 33% 'sporadic' look for information about the EU). Moldovans are again the most 'active' (68%) of all EaP countries; over one in two Armenians, Georgians, and Ukrainians have accessed EU-related information at least once. **The representation of the EU in national media is overall positive (53%)** as is the 'quality' of information – 51% of citizens say that it helps them 'very much' or 'fairly' to have a better understanding of the EU. **Television and the Internet are the main sources** of both 'passive' (respectively 67% and 36%) and 'active' information about the EU (respectively 57% and 53%).*

Around one third of citizens actively seeking for information about the EU searched for 'general information about the EU' (35%), 'social and political news' (33%), 'economic news' (29%) and 'the EU relations with their home country' (29%); and around one fifth (18%, up 3% since 2018) have used EU informational websites at least once, with the EU Facebook page recording most accesses (14%). Around one in two EaP citizens who searched for information on the EU did it in their national language (50%) or in Russian (47%); only 3% in English. The usage of Russian is particularly common among Belarusians and Ukrainians.

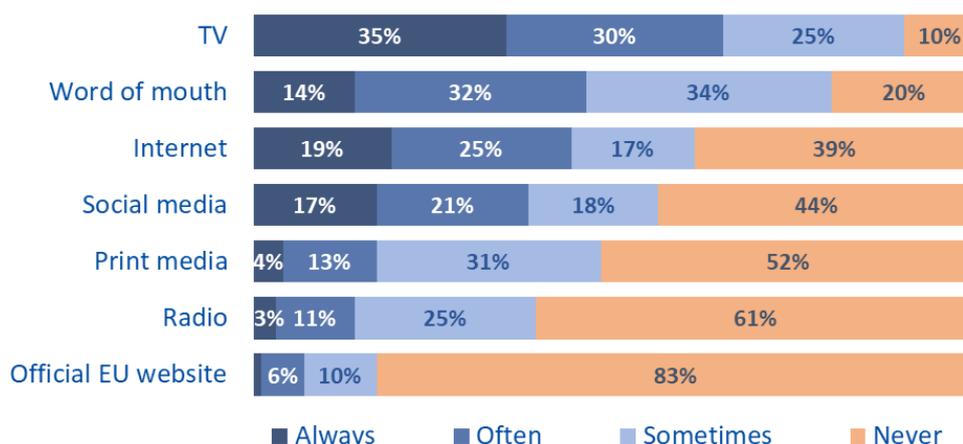
3.3.1. Media usage as sources of information

Television continues to be the most popular source of information in EaP countries – only 10% of citizens 'never' watch it – followed by 'word of mouth' – 20% 'never' rely on it – and new media, such as Internet – 39% 'never' access it – and social media – 44% 'never' use them. Print media are used by around one in two citizens (48%) and the radio by 39% of the population. As for the official EU website – 83% of residents of the EaP countries 'never' use it, it was 86% in 2018.

However, if only very frequent usage of media is considered, the gap with TV is less wide (35% 'always' rely on it) and Internet and social media (with respectively 19% and 17% of individuals 'always' relying on them) slightly overcome 'word of mouth' (14%). At country level, Azerbaijanis are the most likely to be frequent users of the television (89% of citizens), whereas as much as 64% of Belarusians mentioned 'word of mouth' as a primary source of information (and only 62% 'the TV'). The usage of the Internet is also particularly widespread among Moldovans (62% of them 'always' or 'often' use it) and Armenians (62%). The latter are also very keen users of social media (57%). It should also be noted that around 10% of Moldovans, Ukrainians and Armenians mentioned the official EU website among their sources of information – whereas in the other three EaP countries the share of usage of this source of information is below 5%²¹.

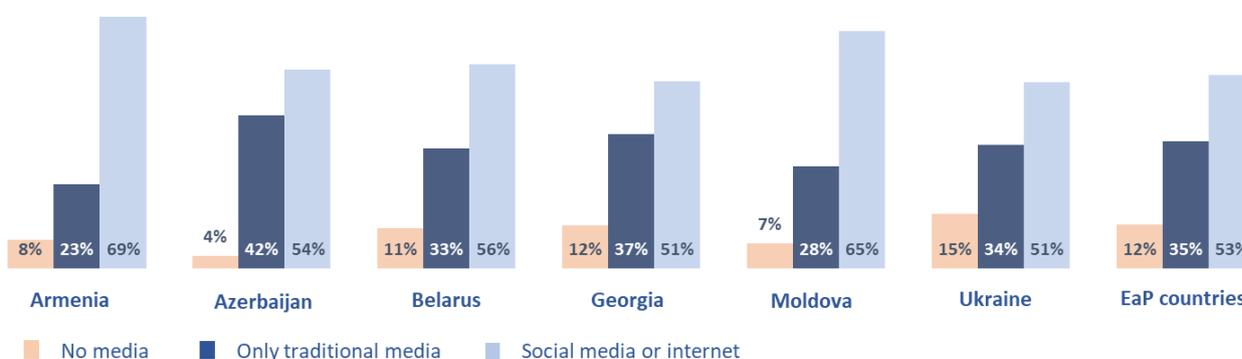
²¹ More details about country data are provided in Annex, Table A5.

FIGURE 19 – Type of media used as a source of information (Q3.7)



The breakdown of frequent users of traditional media only, new media and no media is shown in Figure 20²². If the exclusive usage of traditional media is compared with that of new media, it is evident how the latter have definitely surpassed the former (53% versus 35%) in all countries, and even in Georgia where users of ‘traditional media only’ were still prevalent in 2018 (50% versus 37% in 2019). As last year, the gap between new media and traditional media only is particularly wide in Armenia (69% versus 23%) and Moldova (65% versus 28%), consistent in Ukraine (51% versus 34%) and Belarus (56% versus 33%), and much more contained in Azerbaijan (54% versus 42%). Overall, people who do not frequently use any of the above-mentioned media account for 12% of the population, with no significant difference compared to 2018.

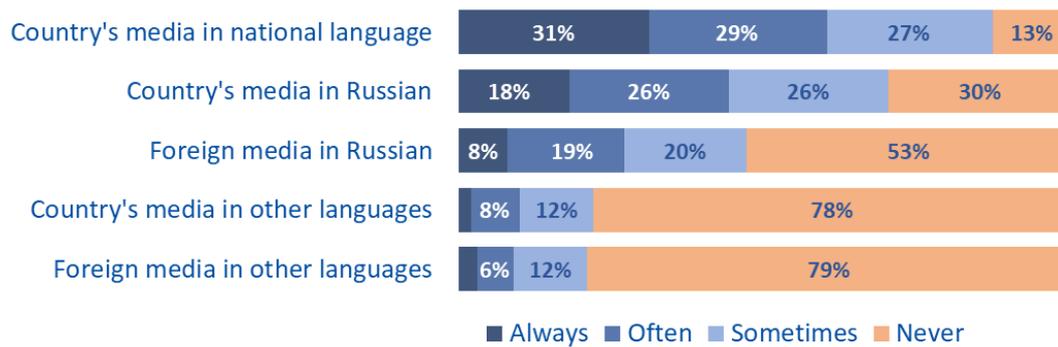
FIGURE 20 – Type of media frequently used as source of information



As in previous waves, the **vast majority of people in the EAP countries rely on their country’s media in the national language** (‘always’ – 31%, ‘often’ – 29%, ‘sometimes’ – 27%), **followed by the country’s media in Russian** (‘always’ – 18%, ‘often’ – 26%, ‘sometimes’ – 26%). Foreign media in Russian are also used by 47% of EAP citizens (up 4% since 2018), and their usage is particularly common in Belarus (70%) and Armenia (61%) and Moldova (59%). Media in other languages, be it the country’s media or foreign media, are ‘never’ used by around 80% of EAP country residents – with only around 10% of citizens relying on them ‘always’ or ‘often’.

²² 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 that ‘always’ or ‘often’ use either the Internet (including the official EU website) or social media.

FIGURE 21 – Usage of media in national language, Russian and other languages (Q3.7)



In the figure below, the usage of media has been compared according to three main profiles of users: individuals who frequently use media in their national language; individuals who frequently use media in Russian; and individuals who use media in other foreign languages²³.

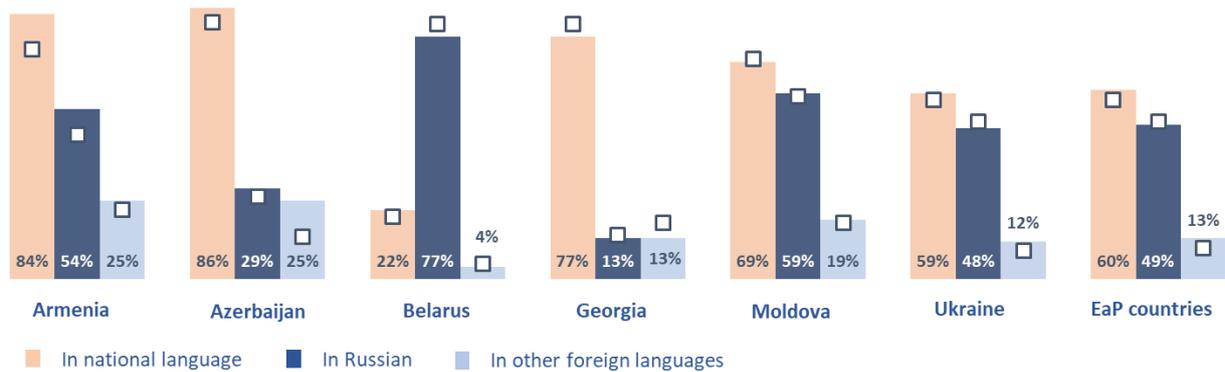
Overall, media in the national language continue the most popular source of information (60%, up 3% since 2018). Frequent usage of media in Russian is also widespread (49% of EaP citizens), whereas 13% citizens also rely on media in another foreign language with no significant change compared to 2018.

The analysis of the sources of information according to language outlines important differences across the six EaP countries. In Belarus, where the majority of citizens use Russian in their daily lives and where the leading Russian broadcasters are received freely, 77% of citizens are frequent users of media in Russian. Media in the Russian language are also quite popular in Moldova and Armenia (59% and 54% of citizens respectively), where Russian TV channels are freely available, as in Belarus. Half of Ukrainians also rely on media in Russian (48%); however, the broadcasting of Russian media has been restricted following the 2014 conflict, and its popularity undermined, with the result that most citizens in fact rely on national media in the Russian language rather than Russian media themselves. Azerbaijanis and Georgians are less frequent users of media in Russian (29% and 13% of citizens respectively), with around 80% of the population frequently relying on media in their national language²⁴. As for media in foreign languages other than Russian, they are most popular in Armenia (25%), Azerbaijan (25%) where around one in four citizens frequently rely on them.

²³ The first group includes all individuals who 'always' or 'often' use media in national language; the second group includes all individuals who 'always' or 'often' use the country's or foreign media in Russian; while the last group includes all individuals who 'always' or 'often' use the country's 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.

²⁴ The role of Russian TV channels in Armenia, Belarus and Moldova is significant, as these are freely available through terrestrial transmitters and the so-called 'hybrid channels', or through different local broadcasters and cable television services. To various extents, these are among the most popular media resources and national broadcasters strive to provide an alternative and reduce their impact. On the contrary, in Azerbaijan and Georgia, Russian channels are only available through cable television, satellite, aerial or the Internet, therefore their role is more limited. In Ukraine, measures to restrict Russian channels were implemented after the armed conflicts in 2014: a number of Russian TV channels were banned from cable and their popularity has been undermined. See: Monitoring of Russian channels by MEMO 98, Final report, 2015. http://www.csdialogue.eu/sites/default/files/monitoring_report_executive_summary.pdf

FIGURE 22 – Frequent usage of media in national language, Russian and other languages



As in 2018, **‘word of mouth’ appears to be the most trusted source of information (57%)** – particularly in Belarus (79%) as opposed to Azerbaijanis who display the lowest level of trust towards this source of information (31%). **Television is the second front runner (53%)** – with the highest levels of trust declared by Armenians (70%) and Georgians (69%). Between 40% and 50% of EaP citizens also trust the Internet (49%) and social media (40%); whereas other traditional sources of information – such as print media and the radio collect lower levels of trust compared to last year (33% and 28%, down 7% and 8% respectively). Trust in the official EU website is basically stable (26% of EaP residents) – peaking in Ukraine at 30%²⁵.

More than one in two residents of EaP countries trust their country’s media in the national language (55%). Country’s media in Russian is trusted by 39% of EaP citizens and foreign media in Russian by 31% of citizens. National media and foreign media in languages other than Russian gather a level of trust of around 20%²⁶. At country level, media in the national language is mostly trusted by Armenia (74%), while Belarusians are as confident towards their country’s media in national language than towards foreign media in Russian (50% both). In fact, Belarusians are more likely to trust foreign media (both in Russian and other languages) if they are foreign rather than nationally owned media . Between around 30% and 40% of Armenians, Moldovans and Ukrainians also trust foreign media in Russian – and between around 40% and 50% national media in Russian. As for media in other foreign languages – in addition to Belarus – their levels of trust peak in Armenia and Moldova – where respectively around one in four and one in five citizens are oriented towards trusting them.

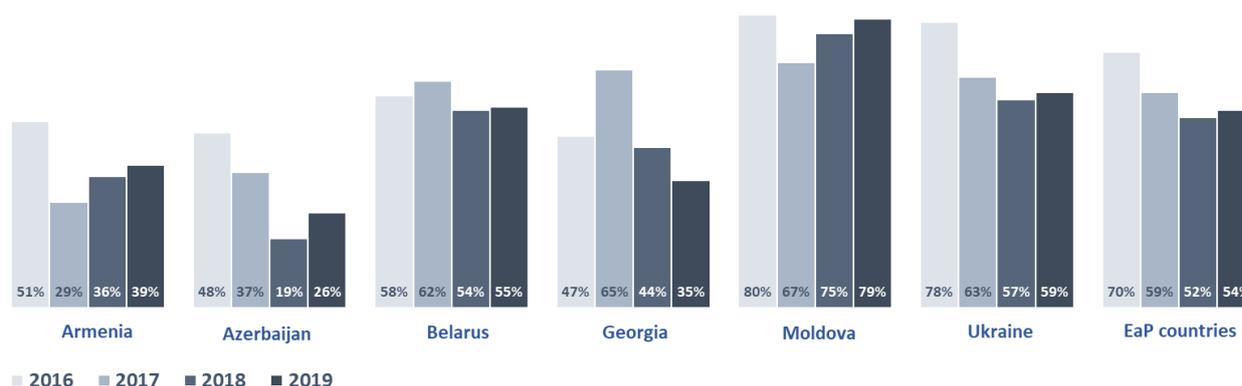
3.3.2. Sources of information about the EU

Around half of the EaP countries (54%) state they have seen or heard some information about the EU in the three months before the survey took place. This finding is in line with last year and still very far from the 70% peak recorded during the 2016 wave and that can be linked to the entry in force of the DCFTA agreements in Moldova and Ukraine (the effects on Georgia are evident in the 2017 wave). In fact, passive exposure continues to be particularly common in Moldova (79%) and, to a less extent, in Ukraine (59%), as well as in Belarus (54%). In Georgia and Armenia, over one third of citizens were reached by EU-related information (35% and 39% respectively); in Azerbaijan only one in five citizens (26%), though an increase of 7 percentage points was observed compared to 2018.

²⁵ More details about country data are provided in Annex, Table A6.

²⁶ More details about country data are provided in Annex, Table A6.

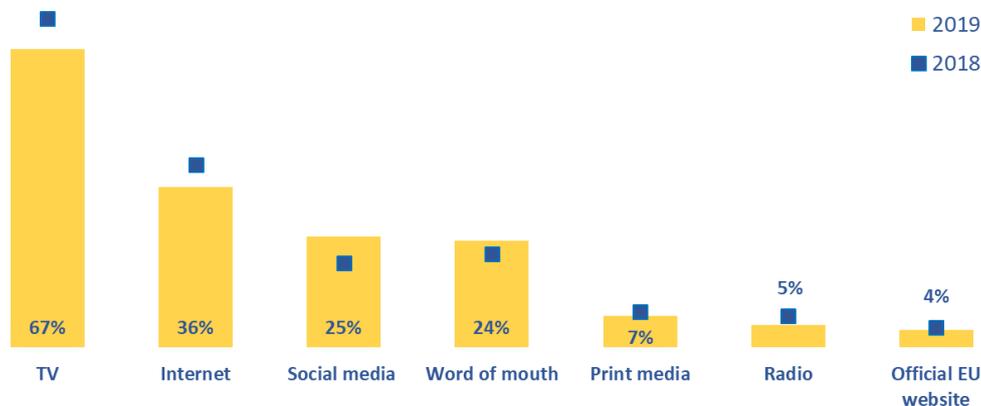
FIGURE 2 – Citizens who have seen or heard information about the EU in the last three months
(Percentages refer to citizens who have heard of the EU)



As expected, television continues to be the main source of EU-related information, although slightly less than in 2018 (67%, down 7%). Passive exposure through the Internet has also recorded a small decrease (36%, down 5% since 2018); whereas information about the EU is increasingly spread through social connections – i.e. social media networks (25%, up 6%) and ‘word of mouth’ (24%, up 3%). Print media, radio and the official website were mentioned by less than 10% of EaP citizens (respectively 7%, 5% and 4%).

FIGURE 24 – Where or from whom have you seen or heard information about the EU in the last three months? (Q3.2.1, multiple answers possible)

(Percentages refer to citizens who have heard any information about the EU in the last three months)



As in 2018, television continues to be the main source of EU-related information in all countries and particularly in Azerbaijan, Georgia and Belarus (82%, 76% and 76% of the respective citizens mentioned it). The Internet is a relevant source of passive exposure in Moldova and more so compared to last year (59%, up 4% with a gap of only 10 percentage points with the TV). New media are also key in Armenia and Ukraine, where 38% and 34% of citizens respectively cited the Internet and 25% and 30% respectively social media. It is worth noting that, over a quarter of citizens in Moldova (29%) and Ukraine (27%) said that they had heard information about the EU through ‘word of mouth’. Passive exposure from the radio and print media is also higher in Moldova (12% and 10% respectively), whereas it does not exceed 8% in all other EaP countries. EU-related information through the official EU website did not reach more than 5% of EaP citizens – with Moldova again as front runner (5%).

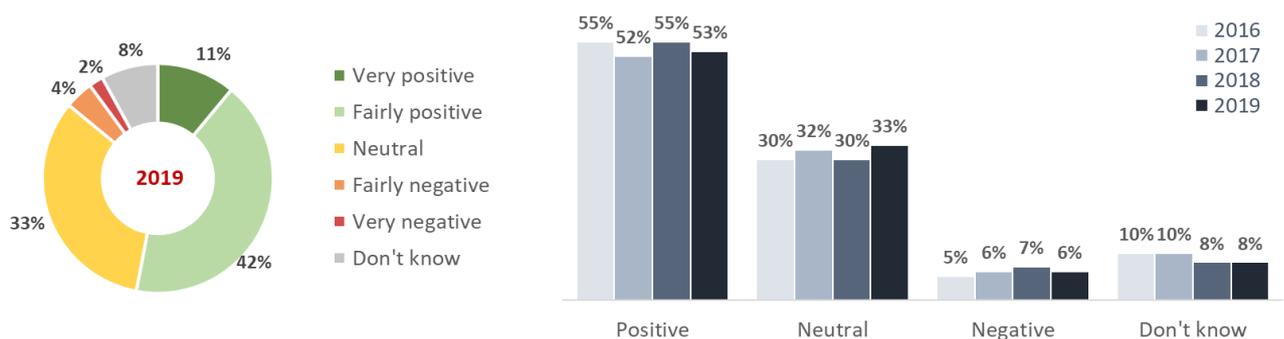
TABLE 6 – Source of information for those who have heard or seen information about the EU

	Q3.2.1 Where or from whom have you seen or heard information about the EU in the last three months? (Multiple answers possible)						
	TV	Internet	Social media	Word of mouth	Print media	Radio	Official EU website
Armenia	68%	38%	25%	8%	2%	2%	1%
Azerbaijan	82%	44%	18%	8%	3%	3%	1%
Belarus	76%	32%	8%	18%	8%	6%	2%
Georgia	76%	26%	16%	15%	4%	1%	2%
Moldova	69%	59%	17%	29%	10%	12%	5%
Ukraine	62%	34%	30%	27%	6%	4%	4%
EaP Countries	67%	36%	25%	24%	7%	5%	4%

Percentages refer to citizens who have heard about the EU

When asked to evaluate the image of the EU in the national media, over half of EaP residents felt that their national media represented the European Union positively (11% ‘very positively’ and 42% fairly positively), with no significant change compared to last year. Around a third of the population believe the EU’s representation in the national media to be ‘neutral’ (33%) and only 6% perceive it as ‘negative’. As in 2018, less than one in ten citizens did not have an opinion regarding this issue (8%).

FIGURE 25 – In general, how would you say the EU was presented in the national media? (Q3.3)
(Percentages refer to citizens who have heard about the EU)



Most of the population gathered a ‘positive’ image of the EU from national media, except for Belarus – where the population is nearly equally split between those who consider the EU representation in the national media to be ‘positive’ (47%) and those who deem it ‘neutral’ (40%) or ‘negative’ (7%) – and Azerbaijan, where again ‘positive’ opinions (43%) nearly match ‘neutral’ (30%) and ‘negative’ (8%) assessments. Azerbaijanis also account for the greatest share of ‘don’t know’ responses (19%), confirming the higher level of unawareness of the EU, and all related issues and perceptions, compared to other EaP countries.

TABLE 7 – Representation of the EU in the national media

	Q3.3. In general, how would you say the EU was presented in the national media?				Total
	Positive	Neutral	Negative	Don't know	
Armenia	63%	26%	4%	7%	100%
Azerbaijan	43%	30%	8%	19%	100%
Belarus	47%	40%	7%	6%	100%
Georgia	59%	30%	4%	7%	100%
Moldova	55%	35%	5%	5%	100%
Ukraine	55%	32%	6%	7%	100%
EaP Countries	55%	33%	6%	8%	100%

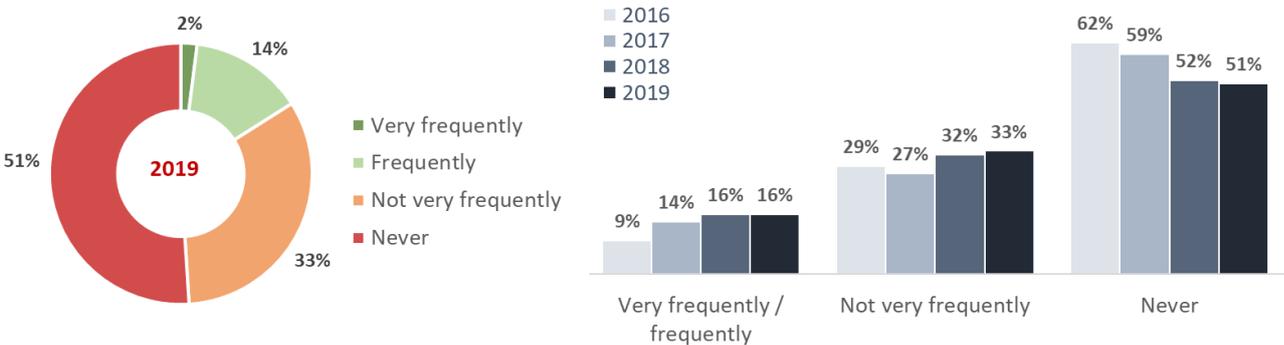
Percentages refer to citizens who have heard about the EU

According to 51% of residents of the EaP countries, the information they read, watch or access online ‘very much’ or ‘fairly’ helps them to have a better understanding of the European Union – with no change compared to 2018. A quarter of citizens feel that the information does not help them ‘very much’ to better understand the EU and 15% are convinced that the information is ‘not at all’ useful. In general, Armenians (66%), Moldovans (66%) and Ukrainians (57%) are more likely to be satisfied with the quality of the EU-related information they can access. On the contrary, Belarusians are the most critical: around three quarters of the population claim that the information they read, watch or access online does not help them ‘very much’ (41%) or ‘at all’ (36%) to have a better understanding of the EU.

The following section looks specifically at sources of information about the EU; hence it only refers to the residents of EaP countries who actively look for/access information on the EU.

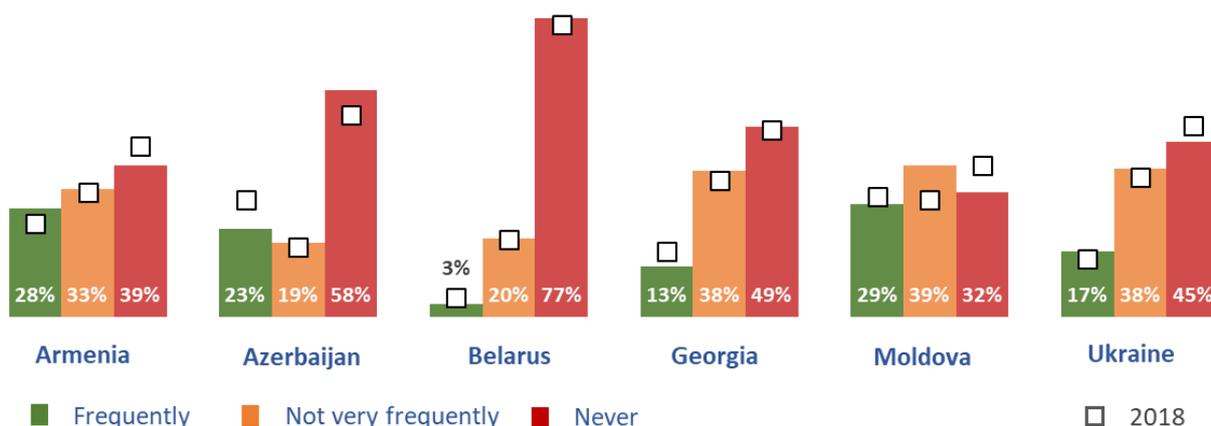
No change was observed with regard to the levels of active exposure to EU-related information across the EaP region compared to last year (49% of citizens look for or access it). In fact, only 16% of citizens access it ‘frequently’ or ‘very frequently’, with most citizens ‘never’ accessing it (51%) and around one third relying on ‘sporadic’ access (33%).

FIGURE 26 – How often do you look for/access information on the EU? (Q3.1) – Regional overview
(Percentages refer to citizens who have heard of the EU)



As in 2018, Moldovans are the most likely to access information on the EU (68%, of which 29% frequently) – possibly due to the high figures of passive exposure (79%). Levels of ‘active’ exposure have increased or remained mainly stable in Armenia, Georgia and Ukraine – where between 51% and 61% of the population looked for EU-related information either ‘frequently’ or ‘sporadically’. Around 40% of Azerbaijanis also engaged in EU-related searches – though less ‘frequently’ than last year (down 6%). In Belarus, only less than one in four citizens ‘frequently’ (3%) or ‘not very frequently’ (20%) access/search for information on the EU, with no significant changes compared to 2018.

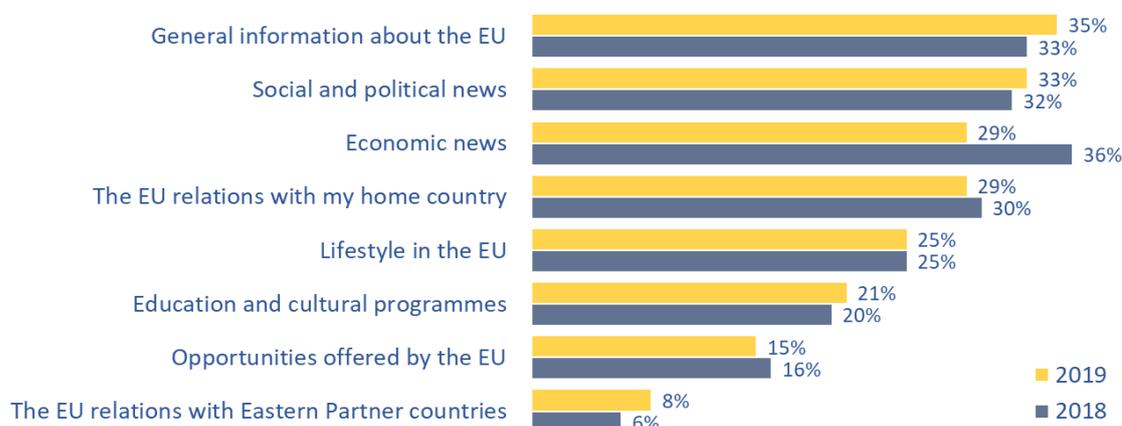
FIGURE 27 – How often do you look for/access information on the EU? (Q3.1) – Regional overview
(Percentages refer to citizens who have heard of the EU)



Every second person (50%) who searches for information about the EU accesses it in their national language, 47% does so in Russian and 3% in English, with no change compared to 2018. The usage of Russian is particularly common among Belarusians, where nearly all individuals who search for information about the EU do so in Russian (99%). Sources in Russian are also preferred by Ukrainians (55% versus 43% national. On the contrary, nearly all Azerbaijanis (84%) and Georgians (82%) and around 70% of Armenians (71%) and Moldovans (71%) access information in their national language – with only between 10% and 25% using Russian and/or less than 10% English.

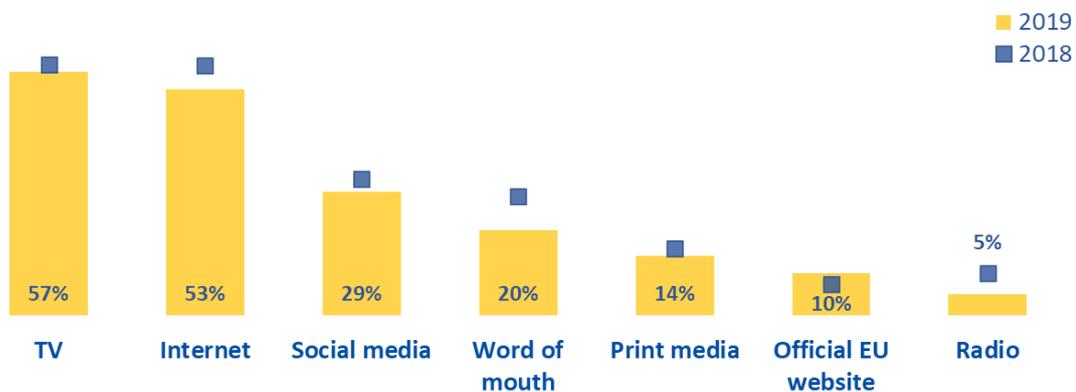
Around one third of ‘active searchers’ look for ‘general information about the EU’ (35%), ‘social and political news’ (33%), ‘the EU relations with their home country’ (29%) – with no significant change compared to 2018 – and ‘economic news’ (29%, down 7%). Between 15% and 25% also search for information about ‘lifestyle in EU Member States’ (25%), ‘educational and cultural programmes’ (21%) and ‘opportunities offered by the EU’ (15%), while only 8% of EaP citizens looking for information about the EU are generally interested in ‘the EU’s relations with EaP countries’. At country level, it is worth noting that as much as 39% of Georgians concentrated their searches on the ‘relations between Georgia and the EU’ and one in five Armenians on ‘the EU’s relations with other EaP countries’. On the other hand, Moldovan and Azerbaijan ‘active’ searchers of information about the EU are mainly interested in ‘the lifestyle in EU Member States’ (around 40% of citizens).

FIGURE 28 – What type of information do you normally look for? (Q3.1.2, multiple answers possible)
(Percentages refer to citizens who have looked for/accessed information on the EU)



As in 2018, television and the Internet continue to be the main providers of information for citizens actively seeking information about the EU (57% and 53% respectively). Social media is pretty much stable at 29%; whereas less and less citizens continue to rely on word of mouth (20%, down 8%). No significant change was recorded with regard to print press (14%), the official EU website (10%) or the radio (5%).

FIGURE 29 – Where do you go to find information about the EU? (Q3.1.4, multiple answers possible)
(Percentages refer to citizens who have looked for/accessed information on the EU)



The television remains the main source of information on the EU only in Azerbaijan (65%) and Ukraine (59%). However, while Azerbaijanis apparently face some difficulties in accessing EU-related contents due to the restricted media space in the country, which makes the national television the main media source – access to all other sources except the Internet is very low. Ukrainians have easier access to more varied sources: 46% of citizens seeking information about the EU searched the Internet; 33% social media and 23% ‘word of mouth’.

The Internet is the main source of information for Armenians (61%,) – who are also keen users of social media (30%), Moldovans (74%) and, especially, Belarusians - where 79% of active searchers used the Internet versus 66% last year. As for Georgians, they seem fairly equally split between television and the Internet (56% and 55% respectively), with an additional 27% of ‘active’ citizens relying on social media. ‘Word of mouth’ is commonly used only by Belarusians and Ukrainians (26% and 23% respectively) – who are also the most likely to access the official EU website (12% both) – in all other EaP countries its usage does not exceed 5%. Virtually no one also relies on the radio – except for Moldovans (11% of citizens).

TABLE 8 – Source of information for those who look for information about the EU

Q3.1.4 Where do you go to find information about the EU? (Multiple answers possible)							
	TV	Internet	Social media	Word of mouth	Print media	Official EU website	Radio
Armenia	48%	61%	30%	17%	5%	3%	3%
Azerbaijan	65%	59%	19%	3%	1%	1%	1%
Belarus	36%	79%	15%	26%	13%	12%	8%
Georgia	56%	55%	27%	9%	6%	5%	2%
Moldova	56%	74%	20%	18%	11%	4%	11%
Ukraine	59%	46%	33%	23%	17%	12%	5%
EaP Countries	57%	53%	29%	20%	14%	10%	5%

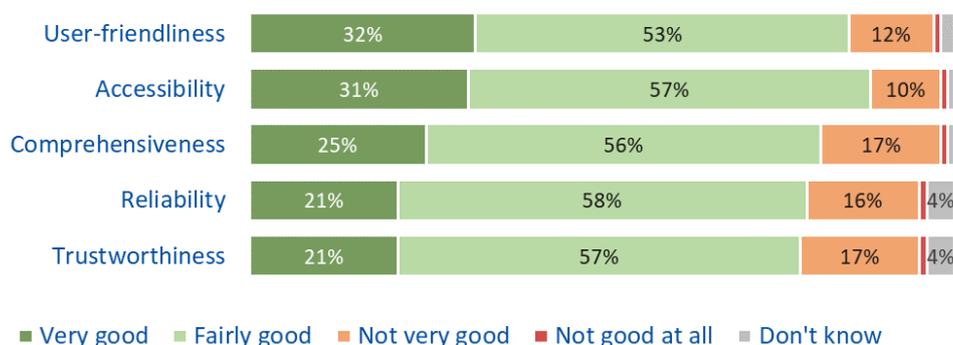
Percentages refer to citizens who have looked for/accessed information on the EU

No significant change was observed in the rating of EU-related information since 2018. Positive opinions were recorded with regard of all characteristics from over three quarters of ‘active’ searchers – of which between 21% and 32% ‘very’ positive and around 55% ‘fairly’ positive. More specifically, the best ratings were observed with regard to user-friendliness (‘very’ – 32%; ‘fairly’ – 53%) and accessibility (‘very’ – 31%; ‘fairly’ – 7%). At country level, figures were slightly lower only in Azerbaijan: not only citizens face

more difficulties in accessing information on the EU, but apparently, they seem also more sceptical in rating its reliability and trustworthiness.

FIGURE 30 – How would you rate the information in terms of...? (Q3.1.5)

(Percentages refer to citizens who have looked for/accessed information on the EU)



Around one in five citizens (18%, up 3% since 2018) who have heard about the EU have used EU informational websites²⁷ at least once. The Facebook page of the EU is the most accessed (14% of ‘active’ users), followed by the EU institution website (6%) and the EU projects’ website (6%). All other EU pages – such as the EU Twitter pages, the EU Delegation website and the ‘EU NEIGHBOURS’ website – have an access share below 5%.

Moldovans are the most active searchers of the EU websites, with as many as 22% of citizens accessing the EU Facebook page and around 15% the EU institutions’ website and the EU projects’ website. This finding is consistent with the high levels of both ‘passive’ and ‘active’ exposure to EU-related information recorded in the country. On the contrary, Azerbaijani and Belarusians display the lowest figures: only the EU Facebook page recorded a 5% access rate from ‘active’ Belarusians, with all other EU websites ranking below.

TABLE 9 – Usage of EU websites

Q3.5 Have you ever used any of the following? <i>(Percentage of the population who answered yes)</i>							
	Armenia	Azerbaijan	Belarus	Georgia	Moldova	Ukraine	EaP Countries
EU institutional website	7%	2%	3%	7%	15%	7%	6%
EU Delegation website	4%	1%	1%	3%	6%	6%	4%
EU projects’ websites	6%	2%	2%	8%	14%	6%	6%
‘EU NEIGHBOURS’ website	3%	1%	1%	3%	8%	2%	2%
EU Twitter	4%	1%	2%	3%	7%	7%	5%
EU Facebook	15%	3%	5%	13%	22%	17%	14%

Percentages refer to citizens who have heard about the EU

²⁷ EU HQ institutions’ websites; EU Delegations websites; EU projects websites; ‘EU NEIGHBOURS’; EU Twitter; EU Facebook.

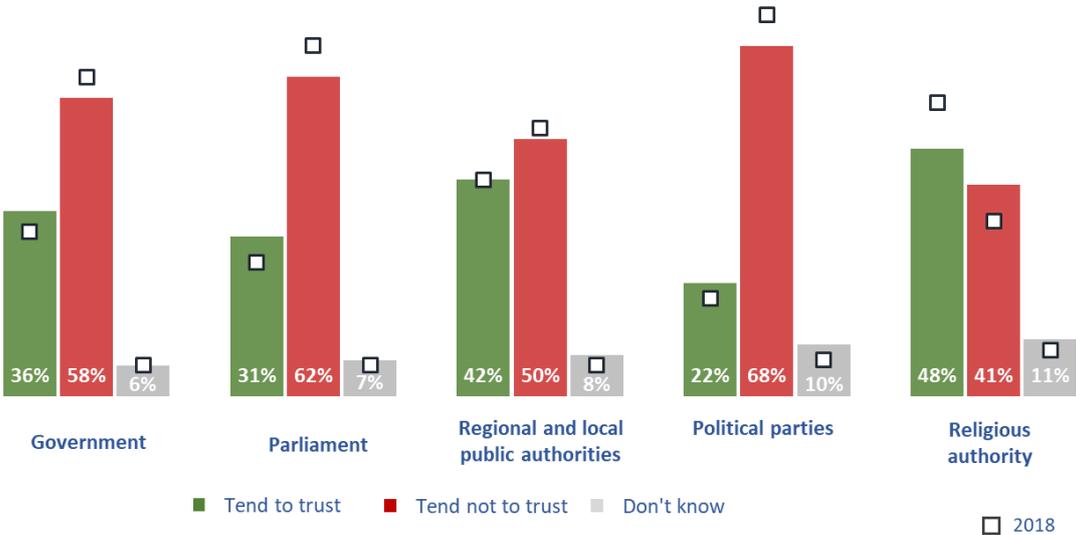
3.4. Views of residents of EaP countries on current situation and future expectations

Compared to 2018, trust levels towards the different institutions and political parties in the EaP region have kept stable or recorded a slight increase. Nevertheless, they remain overall very low – and the **religious authority continues to be the only one towards which trust exceeds distrust** (48% versus 41%). **Regional and local public authorities are the second front runners, trusted by 42% of EaP citizens – but distrusted by 50% –**, followed by the Government (36% versus a 58% distrust rate) and the Parliament (31% versus 62%). Only 22% of EaP citizens trust their political parties. Accordingly, **58% of EaP citizens appear to be ‘not very’ or ‘not at all’ satisfied with the way democracy works in their country**. Nevertheless, a slight increase in positive perceptions (34%, up 5%) was recorded, primarily due to the change in attitudes of Armenians (66% versus 26% in 2018). A slight improvement was also assessed in the path towards democratic governance; still, the only two elements that most citizens feel apply to their country are ‘gender equality’ (65%) and ‘freedom of speech’ (50%), whereas ‘free and fair elections’, ‘rule of law’, ‘equality and social justice’, ‘independence of the judiciary’, ‘good governance’ and, particularly ‘no corruption’ are still far from achieved. **Citizens continue to be more ‘optimistic’ towards their own future (58%) than that of their country (48%)**. As in 2018, ‘low living standards and poverty’, ‘unemployment’ and ‘low salaries and pensions’ appear to be the most pressing concern for around 40% of the EaP population, pointing in the direction of a more inclusive economic process.

3.4.1. View of country’s current situation

Compared to 2018, trust levels towards the different institutions and political parties in the EaP region have remained stable or recorded a slight increase. Nevertheless, they remain overall very low – and the religious authority continues to be the only one towards which trust exceeds distrust (48% versus 41% – although with a much narrower gap than last year). Regional and local public authorities are the second front runners, trusted by 42% of EaP citizens – but distrusted by 50% –, followed by the Government (36% versus a 58% distrust rate) and the Parliament (31% versus 62%). Only 22% of EaP citizens trust their political parties – despite the fact that elections took place in nearly all EaP countries before or right after data collection.

FIGURE 31 – Please tell us your level of trust in the following institutions (Q4.1)



The regional image, though, tends to ‘flatten’ attitudes and perceptions and the picture is more complex and varied at country level. In fact, Azerbaijanis display a very high level of trust towards their institutions, with 85% of citizens trusting the government, 70% the parliament, 67% regional and local public

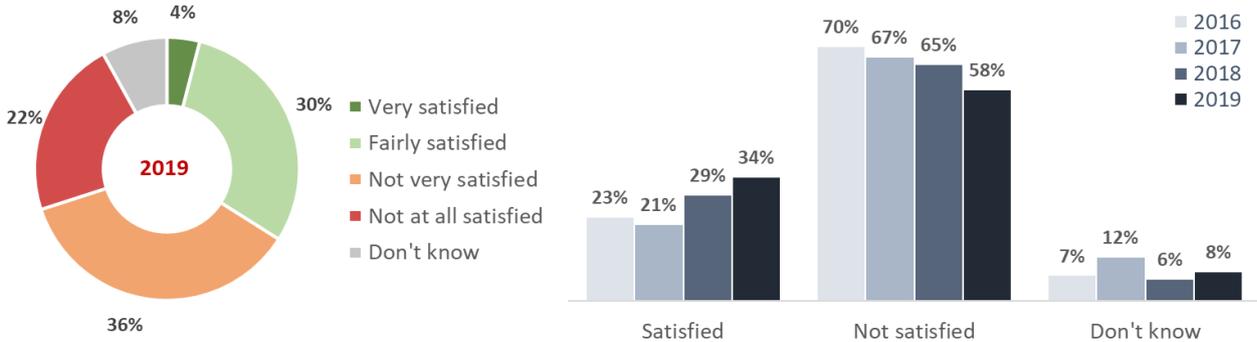
authorities and even 51% the political parties. Belarusians and Georgians are also comparatively quite confident in their institutions, whereas in Armenia, the change in the political context following the 2018 ‘Velvet Revolution’ has produced a significant increase in levels of trust compared to previous years. Currently nearly three quarters of Armenians trust their government (72%, up 44%) and 66% their parliament (up 47%). On the opposite end is Ukraine, where citizens share the lowest levels of confidence in their institutions and political parties of all EaP countries. Moldovans are also very disillusioned – ‘corruption’, ‘independence of the judiciary’ and ‘poor governance’ continue to be the most problematic areas in the country according to citizens – however an increase in trust levels towards the Government (28%, up 4%) and, particularly, the Parliament (22%, up 9%) was observed, reflecting the more positive expectations of the newly elected institutions.

TABLE 10 – Trust in national institutions by country

Q4.1. Please tell us your level of trust for the following institutions (Percentage of the population who answered ‘Tend to trust’)							
	Armenia	Azerbaijan	Belarus	Georgia	Moldova	Ukraine	EaP Total
Government	72%	85%	56%	41%	28%	20%	36%
Parliament	66%	70%	53%	37%	22%	16%	31%
Regional and local public authorities	49%	67%	48%	46%	30%	36%	42%
Political parties	43%	51%	32%	25%	17%	13%	22%
Religious authority	41%	59%	44%	69%	61%	45%	48%

When it comes to the evaluation of the current situation in terms of democracy, 58% of EaP citizens appear to be ‘not very’ or ‘not at all’ satisfied with the way democracy works in their country, nevertheless reflecting a mildly more positive view compared to 2018 (34% of citizens are satisfied versus 29% last year).

FIGURE 32 – On the whole, are you ‘very satisfied’, ‘fairly satisfied’, ‘not very satisfied’ or ‘not at all satisfied’ with the way democracy works in your country? (Q4.3) – Regional overview



In fact, the increase in the overall level of satisfaction can be primarily linked with the change in attitudes of Armenians: 66% of the population is currently satisfied with the way democracy works in their homeland versus 26% in 2018. As in 2018, Azerbaijanis (49%) and Belarusians (40%) display higher levels of satisfaction – which is expected considering that they are also quite confident towards their own institutions. Georgians (77%), Moldovans (76%) and Ukrainians (60%) are the most dissatisfied. However it is worth noting that while in Georgia disillusionment has slightly increased, perceptions are somewhat more positive in both Moldova and Ukraine.

FIGURE 33 – On the whole, are you ‘very satisfied’, ‘fairly satisfied’, ‘not very satisfied’ or ‘not at all satisfied’ with the way democracy works in your country? (Q4.3) – Country specific picture

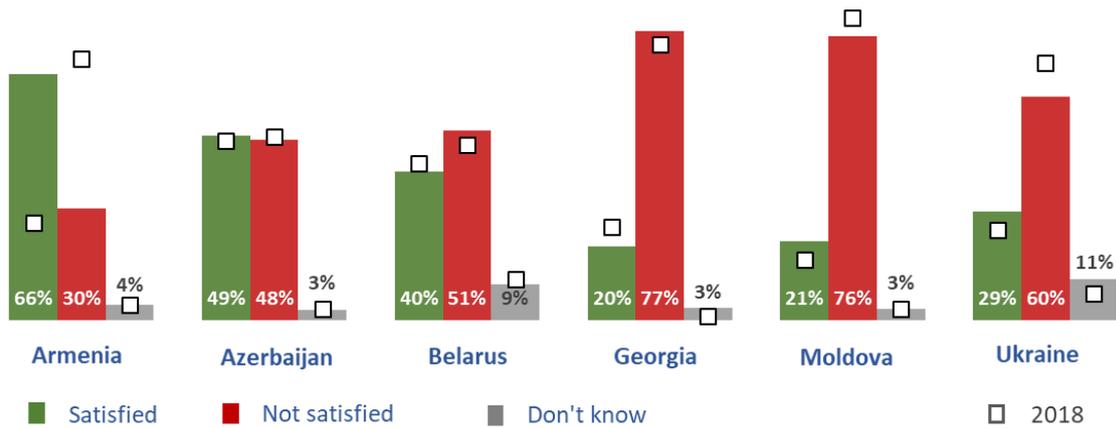
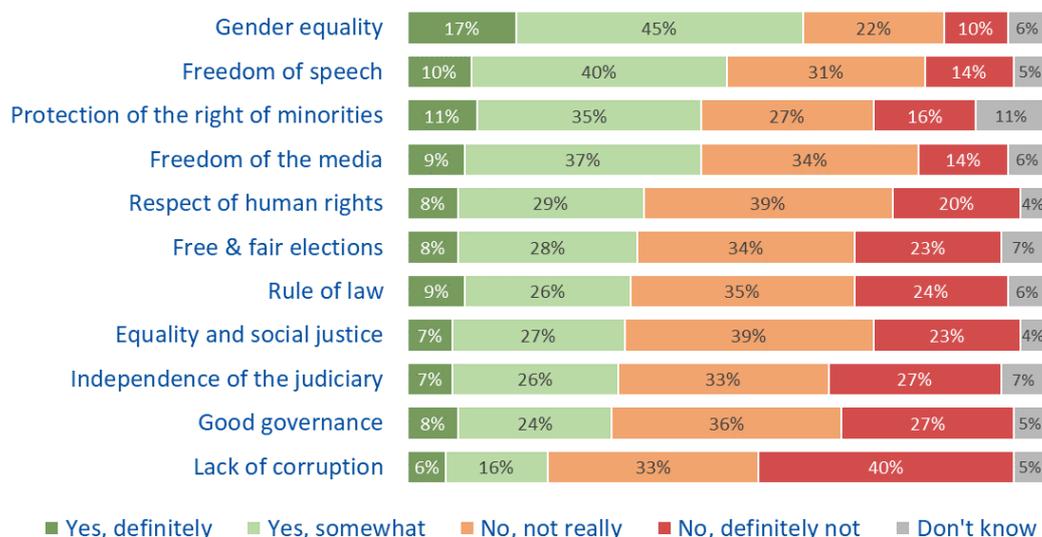


Figure 34 displays the ranking of the democratic elements that apply to their country according to EaP citizens – in this sense it provides a ‘true-to-life measure’ of the extent to which citizens believe that their countries have managed to establish sustainable democratic institutions and practices. Overall, a slight improvement has been observed compared to 2018, still, the only elements that most citizens feel applies to their country are ‘gender equality’ (62%, up 5% since 2018) and ‘freedom of speech’ (50%, up 7%). The hierarchy of the other elements that EaP citizens believe apply to their country is largely consistent with last year’s findings and ‘respect of human rights’, ‘free and fair elections’, ‘rule of law’, ‘equality and social justice’, ‘independence of the judiciary’ and ‘good governance’ were assessed as much more problematic (around 60-65% of EaP citizens stated that they do ‘not really’ or ‘not definitely’ apply to their country). In particular, despite a more positive evaluation, the issue of corruption continues to be the most critical – 40% of EaP citizens say it ‘definitely’ does not apply to their country and for 33% it does ‘not really’ apply – outlining how all six EaP countries face challenges in addressing it.

FIGURE 34 – To what extent do you think that the following elements apply in your country? (Q4.4)



As in 2018, Azerbaijanis, Belarusians and Georgians provide on average more positive assessments about the prevalence of most democratic indicators in their country and they were joined, this year, by Armenians. The shift in Armenians’ attitudes is really impressive: in 2018 the majority of the population acknowledged that only two indicators, namely ‘freedom of the media’ and ‘freedom of speech’, were guaranteed in Armenia; in 2019 all democratic indicators are over the 50% threshold. Moldovans and particularly Ukrainians continue to be the most disillusioned with regard to the path towards democratic governance; in fact, only elements associated with individual freedom seem guaranteed in these

countries, whereas progress towards democratic reforms and governance appears to have overall stalled. ‘Corruption’, ‘independence of the judiciary’ and ‘poor governance’ continue to be the most problematic areas: less than 22% of citizens are convinced that they apply to their country. It is also worth noting that ‘corruption’ is the most problematic issue in all EaP countries – only in Armenia, most citizens (56%) do not consider it an issue.

TABLE 12 – Elements that apply to the country

Q4.4. To what extent do you think that the following elements apply in your country? (Percentage of the population who answered ‘Yes, definitely’ or ‘Yes, somewhat’)							
	Armenia	Azerbaijan	Belarus	Georgia	Moldov a	Ukraine	EaP Total
Freedom of speech	89%	61%	59%	64%	40%	44%	50%
Free & fair elections	87%	63%	52%	37%	27%	24%	36%
Gender equality	63%	62%	70%	56%	55%	60%	62%
Protection of the rights of minorities	74%	73%	53%	59%	45%	35%	46%
Independence of the judiciary	61%	64%	51%	31%	22%	22%	33%
Freedom of the media	86%	65%	48%	62%	35%	40%	46%
Respect of human rights	73%	66%	52%	43%	37%	25%	37%
Rule of law	71%	68%	60%	32%	26%	21%	35%
Good governance	70%	68%	53%	31%	22%	19%	32%
Lack of corruption	56%	35%	35%	28%	13%	13%	22%
Equality and social justice	59%	62%	44%	39%	25%	25%	34%

3.4.2. Future expectations

In line with the trend recorded at country level, citizens of the EaP countries seem to be slightly more optimistic towards their own future (58%) than to the future of their country (48%) – and slightly more optimistic about both compared to 2018 (up 2% and 3% respectively).

FIGURE 35 – How optimistic are you about the future of your country? (Q4.5) – Regional overview

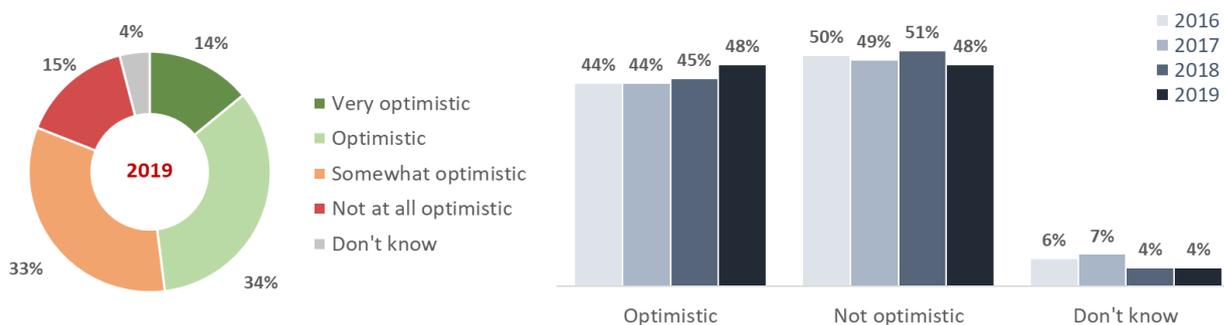
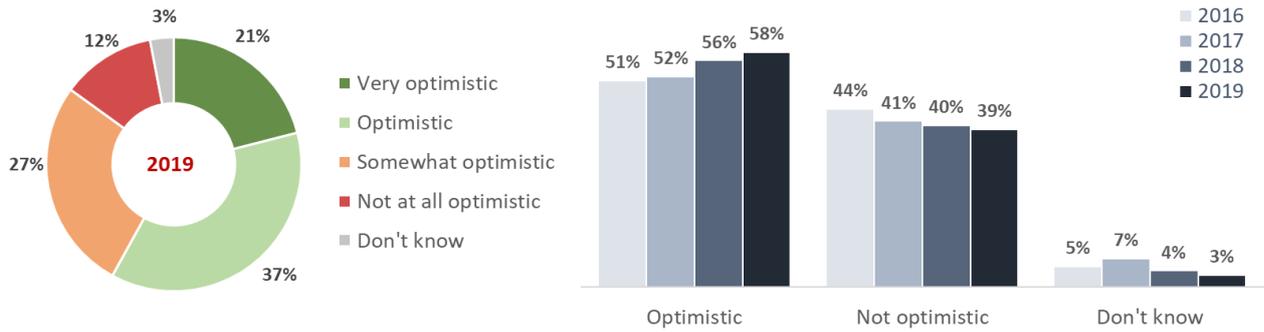


FIGURE 36 – How optimistic are you about your personal future? (Q4.6) – Regional overview



Compared to last year, expectations are mostly stable in Ukraine, Moldova and Georgia – where between 54% and 72% of citizens are optimistic towards their personal future and between 45% and 59% towards the future of their country. Belarusians seem slightly more concerned about the future of their country, (59% are pessimistic versus 54% in 2018); while Azerbaijanis (68%) and, particularly, Armenians (70%) are much more optimistic about their country’s future, reflecting their hopes in the new country’s leadership.

FIGURE 37 – How optimistic are you about the future of your country? (Q4.5) – Country specific picture

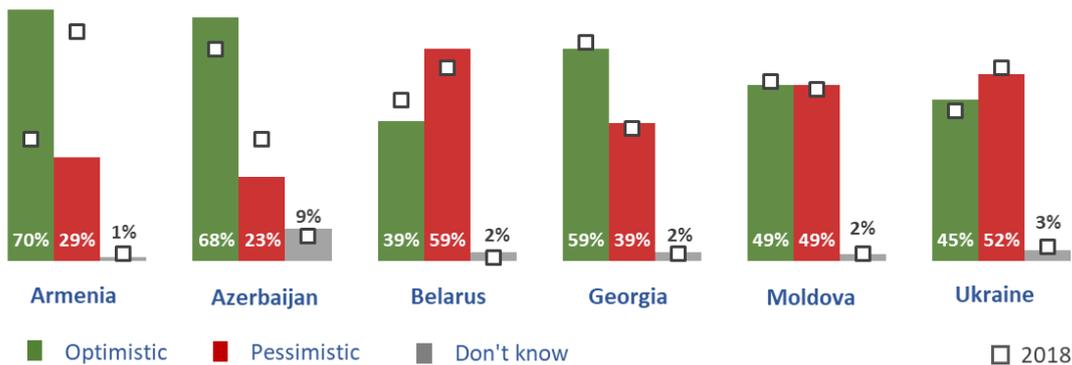
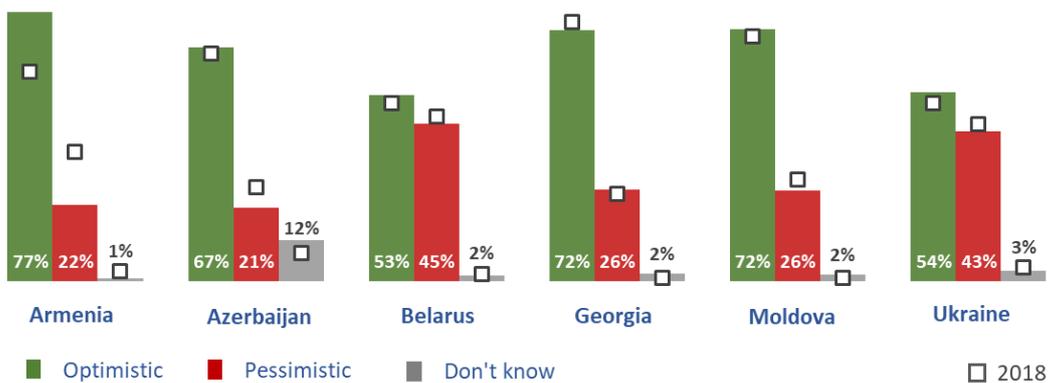


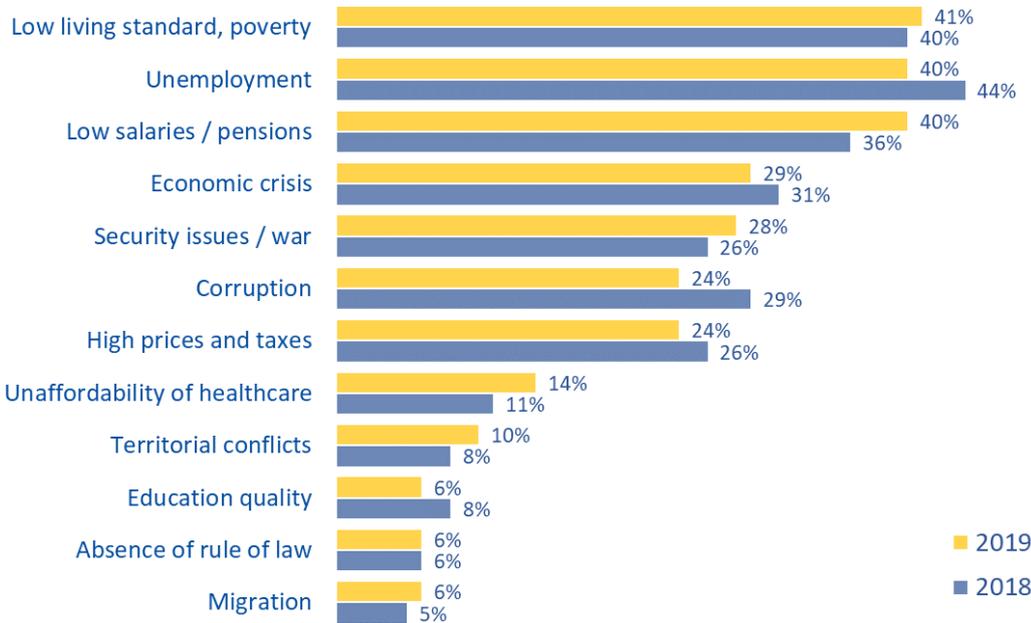
FIGURE 38 – How optimistic are you about your personal future? (Q4.6) – Country specific picture



As in 2018, ‘low living standards and poverty’, ‘unemployment’ and ‘low salaries and pensions’ appear to be the most pressing concern for around 40% of the EaP population. This finding might plausibly be explained by the economic situation in many EaP countries: Armenia and Georgia have the highest unemployment rate of the whole EaP region; in Ukraine inflation is impacting on the incomes and living standards of citizens; in Belarus, the low economic growth persists, and the economy remains vulnerable. In fact, despite the fact that most countries have recovered from the 2014-15 crisis, around one third of EaP citizens are still worried about ‘the economic crisis’ (29%).

Around 30% of EaP citizens also mentioned ‘security issues and war’ (28%, up 2% since 2018) and 10% ‘territorial conflicts’ (up 2% as well). It is worth noting that, despite the issue of the unresolved dispute over Transnistria, these issues - mentioned by only 2% of citizens - are not a major concern for Moldovans, while they are much more felt in Ukraine (39% and 8% respectively); Azerbaijan (20% and 24% respectively); Georgia (4% and 22% respectively) and Armenia (19% and 6% respectively). Aside ‘low salaries and pensions’, Moldovans’ priority remains the widespread issue of ‘corruption’, which was mentioned by 47% of citizens²⁸.

FIGURE 39 – What do you consider to be the most pressing problems facing your country? (Q4.2, multiple answers possible)



²⁸ More details about country data are provided in Annex, Table A7.

3.5. Profiling attitudes towards the EU: positive versus neutral

EaP citizens with a positive view of the EU account for nearly half of the population (52%, up 6% since 2018). Compared to citizens with a neutral view of the EU (34%, down 3%), they tend to be slightly more concentrated among the younger age groups (41%), the most educated (40%) and bigger cities' residents (39%). They are also more likely to be native speakers of their national language (78%), whereas 'neutral' individuals are more likely to be females (60%), elderly (36%), with a low level of education (71%), live in smaller settlements (51%) and be native Russian speakers (36%). Levels of 'active' and 'passive' exposure to EU-related information as well as the type of media 'frequently' used are strong characterising factors: 64% of EU supporters have seen or heard information about the EU and the same share have looked for/accessed information on the EU (versus 46% and 35% for 'neutral' citizens). Levels of exposure impact on all other perceptions. In fact, EU supporters share a higher level of confidence in all foreign institutions – whereas, for neutral individuals, trust prevails over distrust only for the EU – and a much stronger and more positive vision of the EU. They also tend to be more 'optimistic' towards their personal future and particularly the future of their country.

In this section, the attitudes of EaP citizens towards the EU have been analysed according to two main profiles: individuals that have a positive image of the EU and those who are neutral towards it²⁹.

Attitudes were profiled against a comprehensive set of indicators, starting with the main socio-demographic characteristics, followed by passive and active exposure to EU-related information (including main language used and subjects of interest), assessment of the relationship between their country and the EU, awareness and effectiveness of its financial support and level of trust towards the EU and other foreign institutions, and finally the perception of the country's and respondents' personal future and main concerns.

3.5.1. Positive attitudes

Citizens with a positive view of the EU account for over half of all EaP citizens (52%, up 6% since 2018). Compared to the general population of the EaP region, they tend to be slightly more concentrated among the younger age groups (41% are aged between 15 and 34 years versus 35% among EaP citizens overall), the most educated (40% have a high level of education, versus 34%) and the bigger cities' residents (39% versus 36%). They are also more likely to be native speakers of their national language (78% versus 71%) than the overall EaP population. No peculiarities were assessed with regard to gender and employment status: 53% of EU supporters are females and 65% are unemployed or inactive.

²⁹ Individuals that were mostly negatively oriented were excluded from the comparison, as their number was too small for the results to be statistically significant.

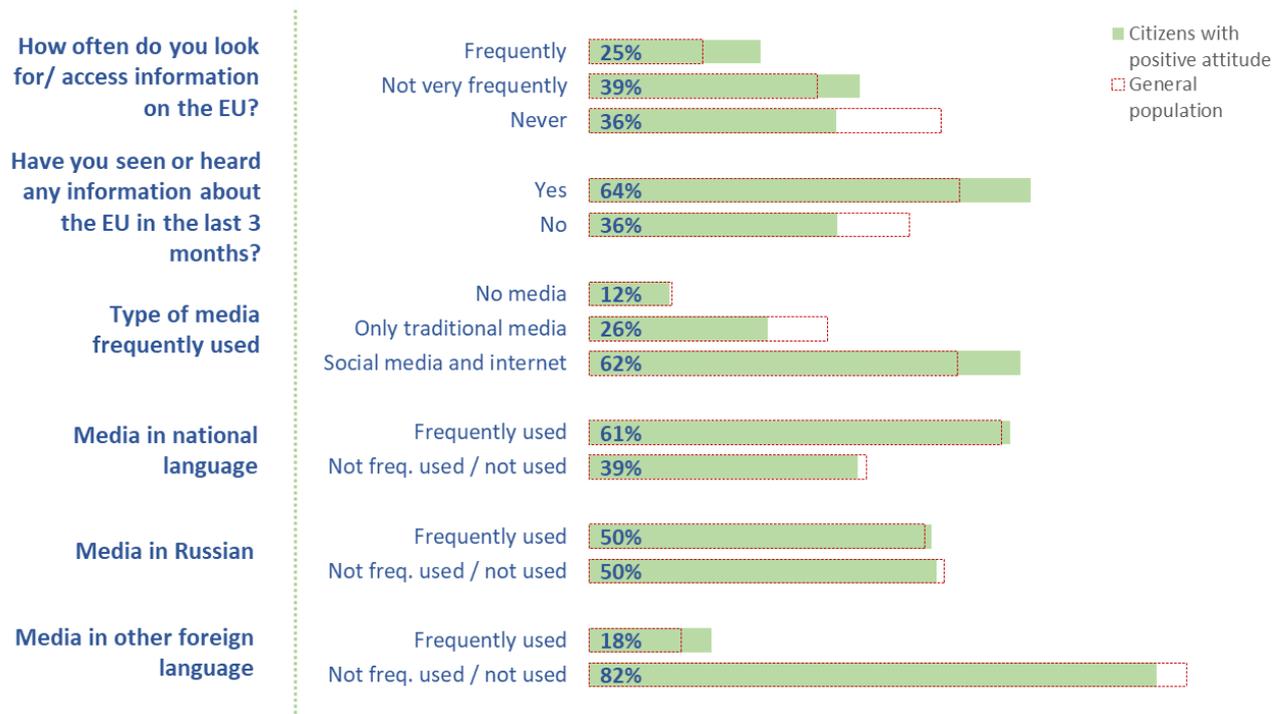
FIGURE 40 – Socio-demographic characteristics and country of EaP country residents with a positive image of the EU



EaP citizens with a positive view are more likely to be actively and passively exposed to information about the EU than the EaP citizens in general. In fact, 64% (up 2% since 2018) had seen or heard information about the EU in the three months preceding the survey (versus 54% for the overall EaP population) and 64% (up 4% since 2018) look for/access information on the EU frequently (25%) or not very frequently (39%) – the corresponding figures of active exposure in the general EaP population stand at 16% and 33% respectively.

EU supporters are keener users of new media – 62% frequently use the Internet and social media (compared to 53% of the general EaP population) – and less likely to rely exclusively on traditional media only (26% versus 35%). EaP citizens with a positive attitude towards the EU are also more likely to use media in other foreign languages (18% versus 13%). If searching for EU-related information, 55% of EU supporters who are ‘active’ searchers use their national language, 41% Russian and 4% English – the respective figures for the general population are 50%, 47% and 3%. They also appear to be slightly more interested in ‘economic news’ (33% versus 29%), ‘the EU relations with their home country’ (32% versus 29%) and ‘lifestyle in the EU’ (28% versus 25%) and ‘education and cultural programmes’ (23% versus 21%).

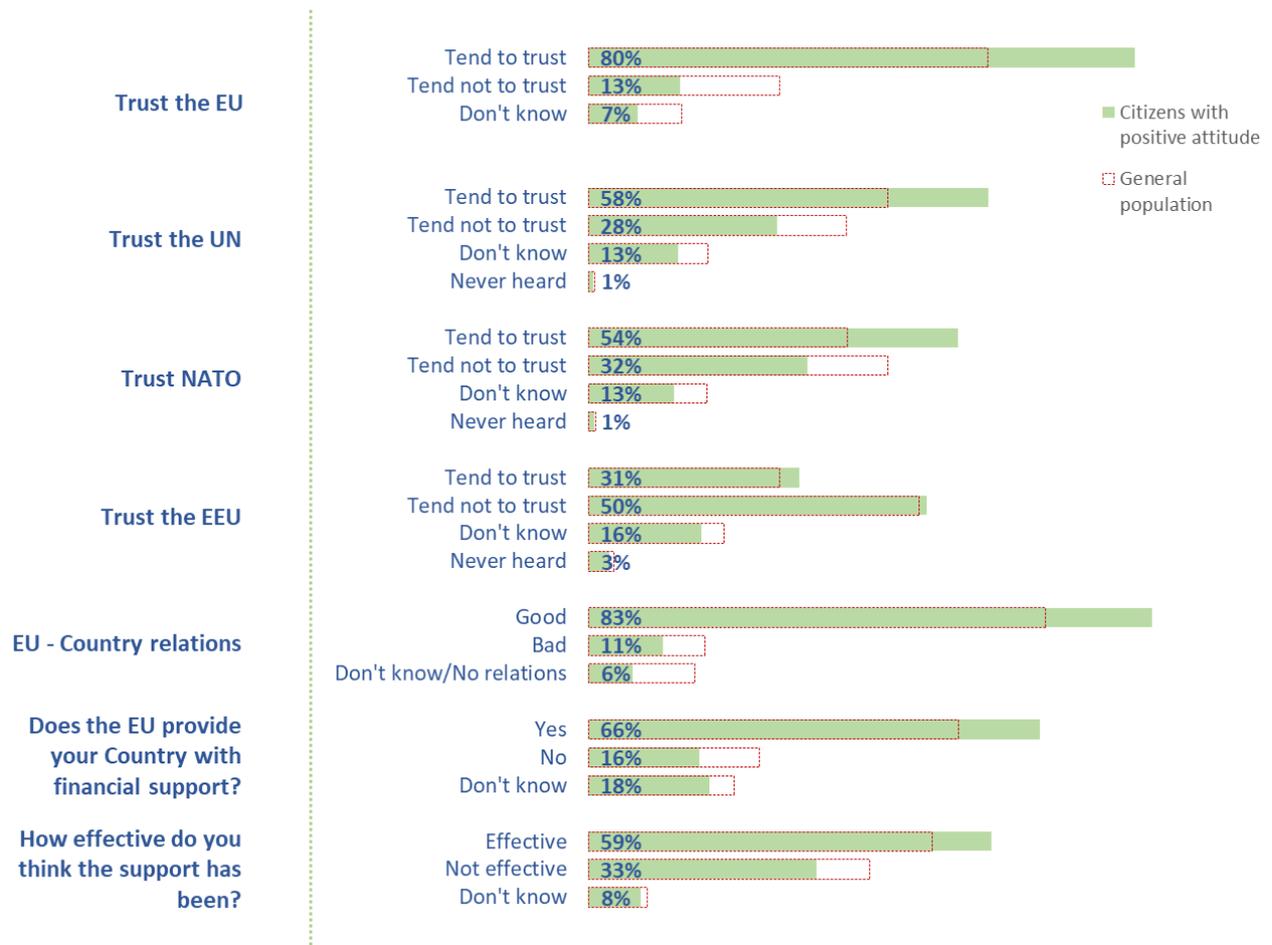
FIGURE 41 – Exposure to information about the EU and media usage among EaP country residents with a positive image of the EU



A positive image of the EU is definitely linked to a higher level of confidence in the EU and in all foreign institutions compared to the general population. Nevertheless, it should be noted that while the difference between the levels of trust is very wide for the EU (80% of positively oriented citizens trust it, corresponding to a difference of 22% percentage points), the UN (58%, difference equal to 14%) and NATO (54%, difference equal to 16%), when it comes to the EEU, opinions tend to converge (31%, difference equal to 3%).

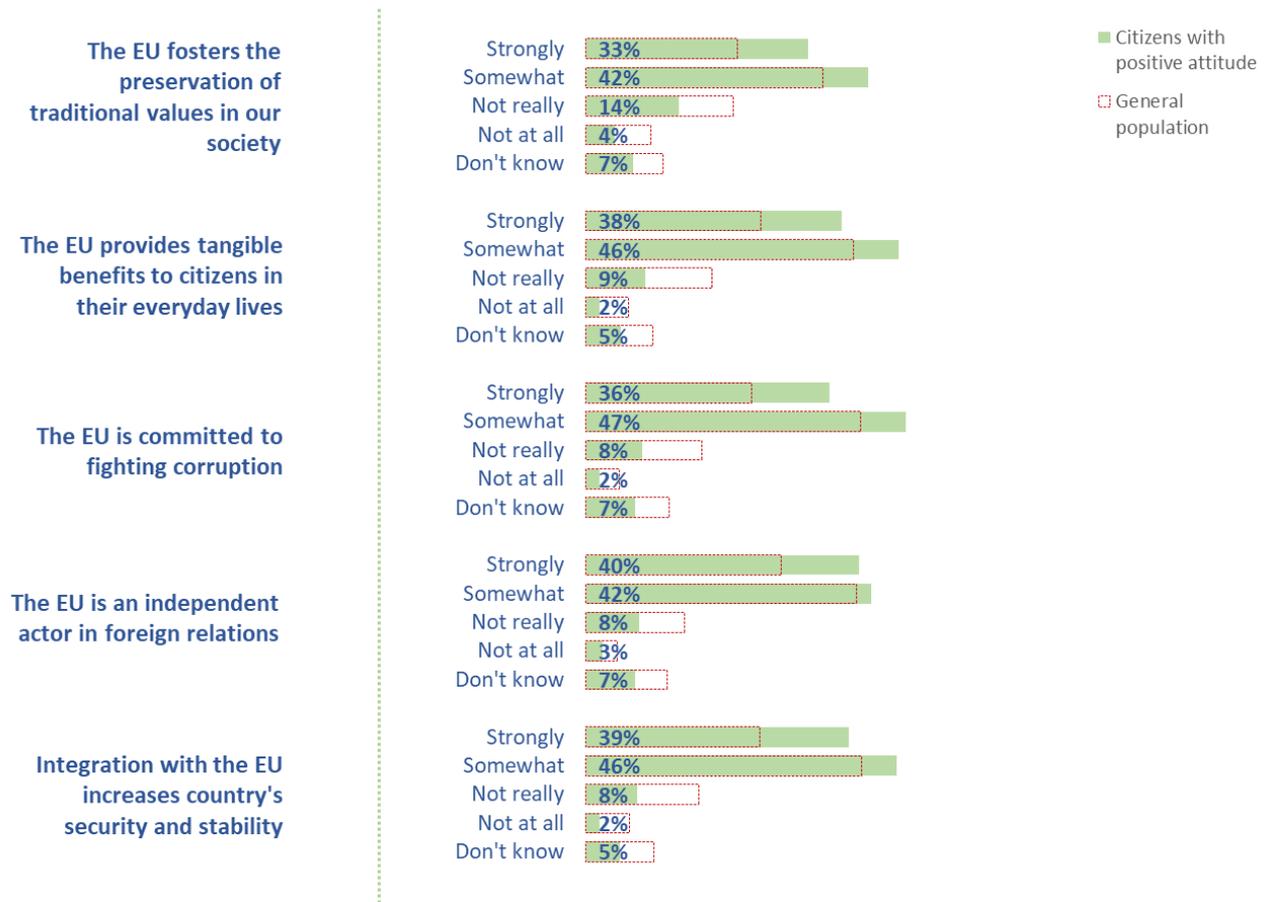
In addition, 83% of all EU supporters hold a ‘good’ image of the relations between their country and the EU (versus 67% in the general population), 66% acknowledge the EU’s financial support (versus 54%) and 59% of them rate the it as effective (versus 50%). **All figures are consistent with last year’s findings and confirm how the greater exposure to EU-related information has a great impact on acknowledgement of the EU role.**

FIGURE 42 – Attitudes towards the EU among EaP country residents with a positive image of the EU



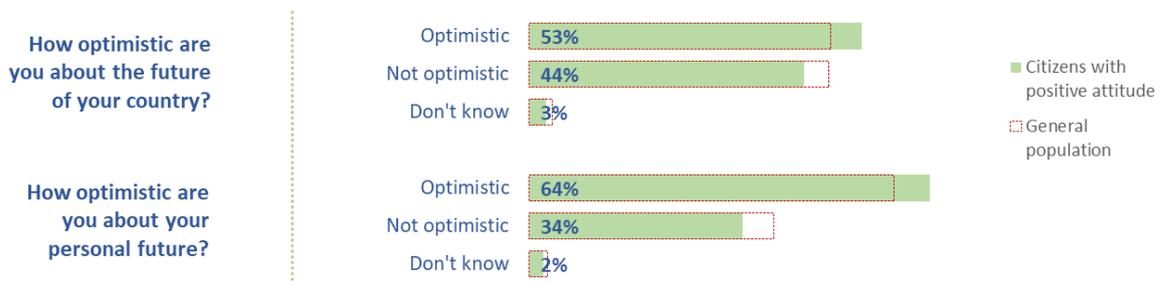
Over 80% of EU supporters ‘strongly’ or ‘somewhat’ agree with four (out of five) statements on common beliefs regarding the EU – reaching a peak of 85% when it comes to the rating of the effects of closer integration with the EU on country’s ‘security and stability’ – the respective figure for the overall population is 65%. As previously noted, more EaP citizens each year perceive the EU as a strong safeguard with regard to their territorial integrity and peaceful existence. In fact, the only statement that collected a slightly lower level of ‘agreement’ is ‘the EU fosters the preservation of traditional values in our society’ – still 75% of EU supporters substantially agreed with it and lower levels of agreement were recorded only among Georgians and Belarusians due to the widespread popularity of Russian media and/or anti-western media sources.

FIGURE 43 – Common beliefs of EaP country residents with a positive image of the EU



EU supporters are more positive than the overall population with regard to their personal future (64% portrayed themselves as 'optimistic' versus 58%) and their country's future (53% versus 48%). In general, no significant differences are recorded as regards the most pressing problems that EaP countries are facing, with the only exception of 'salaries and pensions' towards which EU supporters seem to be slightly less worried than the overall population (36% versus 40%).

FIGURE 44 – View of the future among EaP country residents with a positive image of the EU



3.5.2. Neutral attitudes

EaP citizens with a neutral view of the EU account for slightly over one third of the population (34%, down 3%). Compared to EU supporters, EaP citizens with a neutral view are more likely to be females (60% versus 53%), elderly (36% are over 55 versus 24%), have a lower level of education (71% versus 60%) and live in smaller settlements (51% versus 46%). In addition, 36% are native Russian speakers compared to 21% among EU supporters.

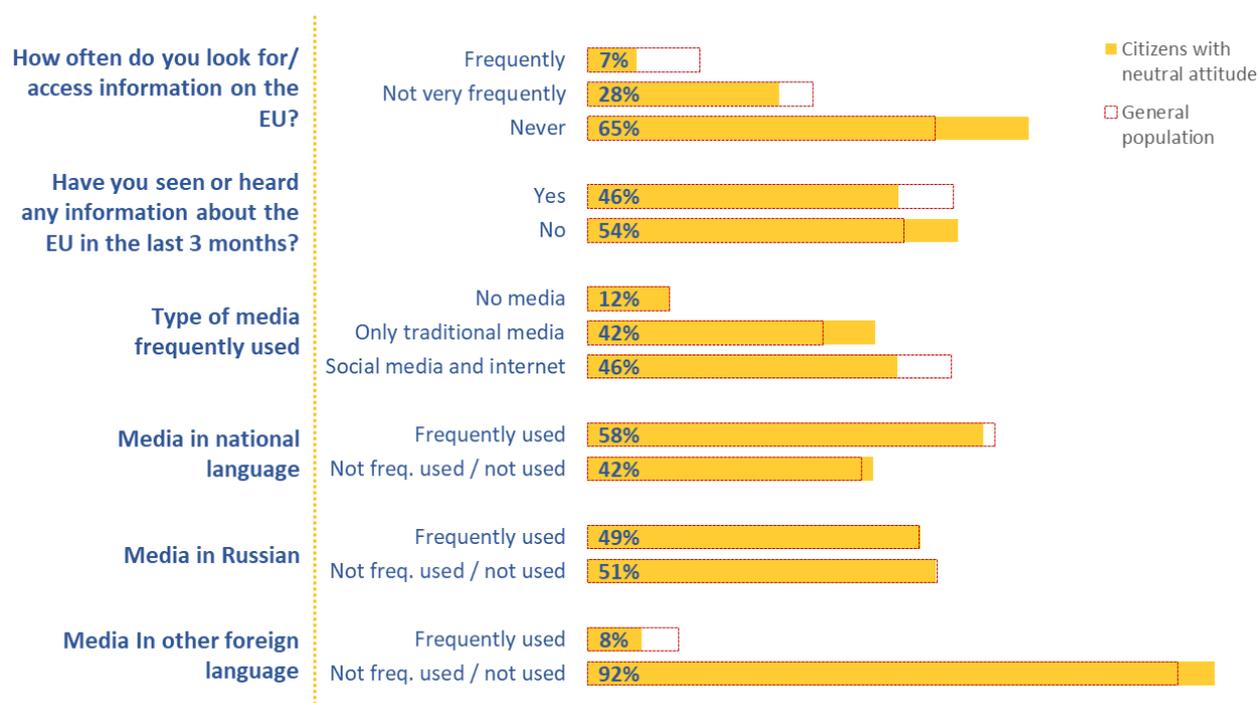
FIGURE 45 – Socio-economic characteristics and country of EaP country residents with a neutral image of the EU



Around half of those holding a neutral stance have not heard any information about the EU in the three months preceding the survey (54%), and around 65% have not accessed/searched for EU-related information (36% for ‘passive’ and ‘active’ exposure of EU supporters). Neutrally oriented citizens are also more likely to rely exclusively on traditional media (42%) than positively oriented EaP citizens (26%) and less likely to be frequent users of new media (46% versus 62%).

If searching for EU-related information, 59% of neutrally oriented citizens who are ‘active’ searchers use Russian, 39% their national language and only 2% English – the respective figures for EU supporters are 41%, 55% and 4%. Compared to positively oriented citizens, they mainly search for ‘general information on the EU’ (37%) and/or ‘social and political news’ (33%), displaying lower levels of interest for all other EU-related information. In particular, only 20% of neutrally-oriented citizens who looked for information searched for ‘the EU relations with my home country’ (versus 32% of EU supporters) and ‘economic news’ (versus 33%), only 19 for ‘lifestyle in the EU’ (versus 28%), only 16% for ‘educational and cultural programmes’ (versus 23%) and only 4% for ‘the relations with other EaP countries’ (versus 9%).

FIGURE 46 – Exposure to information about the EU and media usage among EaP country residents with a neutral image of the EU

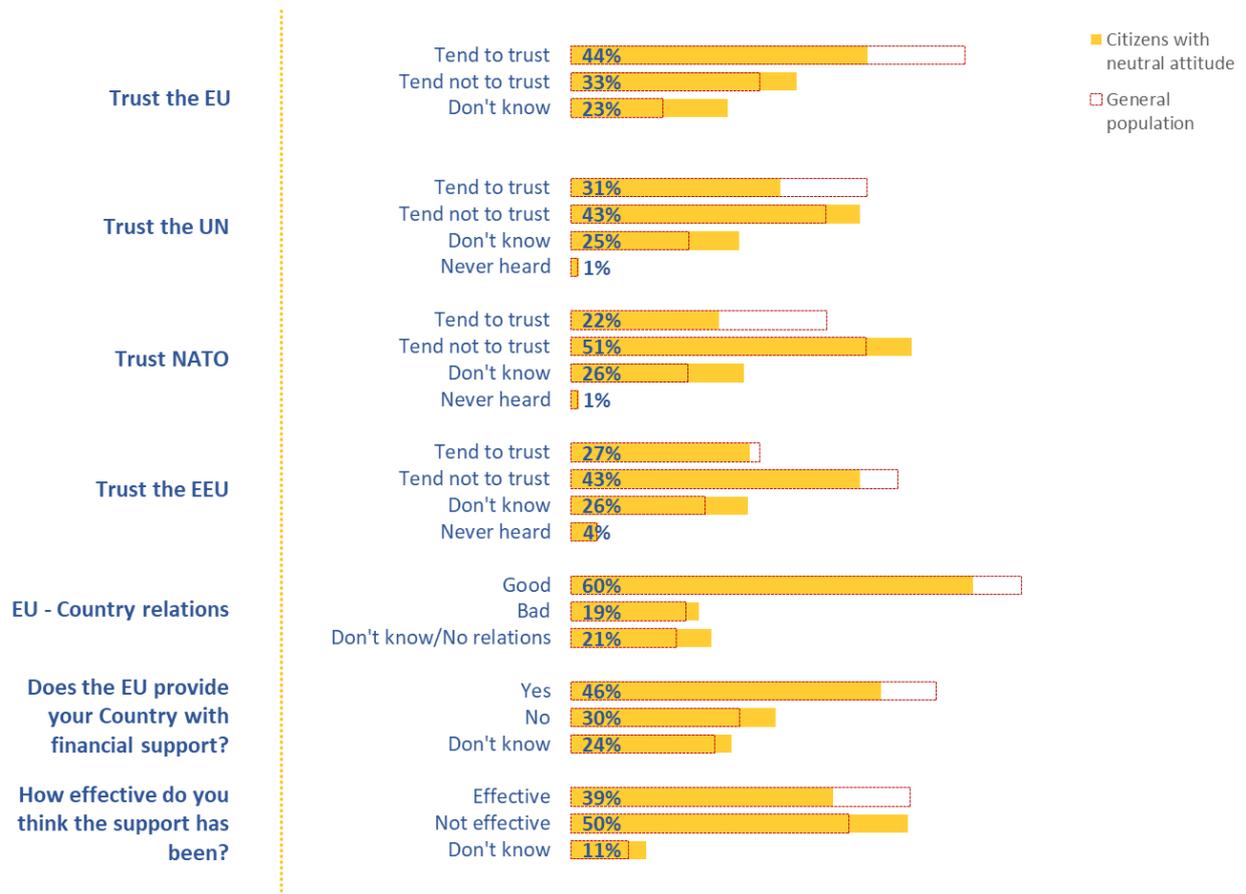


As opposed to EU supporters, ‘neutral’ citizens display a lower awareness of main foreign institutions: in fact, around one in four could not rate its level of trust, nor evaluate the nature of relationship between the EU and their country and/or the extent of its financial support. Their disinterest in foreign politics is linked to their lower exposure to EU-related information – which clearly extends to other foreign institutions.

In fact, trust prevails over distrust only for the European Union and 44% of ‘neutral’ EaP citizens trust the EU (versus 33% who distrust it). Over 40% of neutrally oriented EaP citizens distrust the UN and the EEU (43% both); over 50% distrust NATO (though opinions are less negative than in 2018 by 7 percentage points).

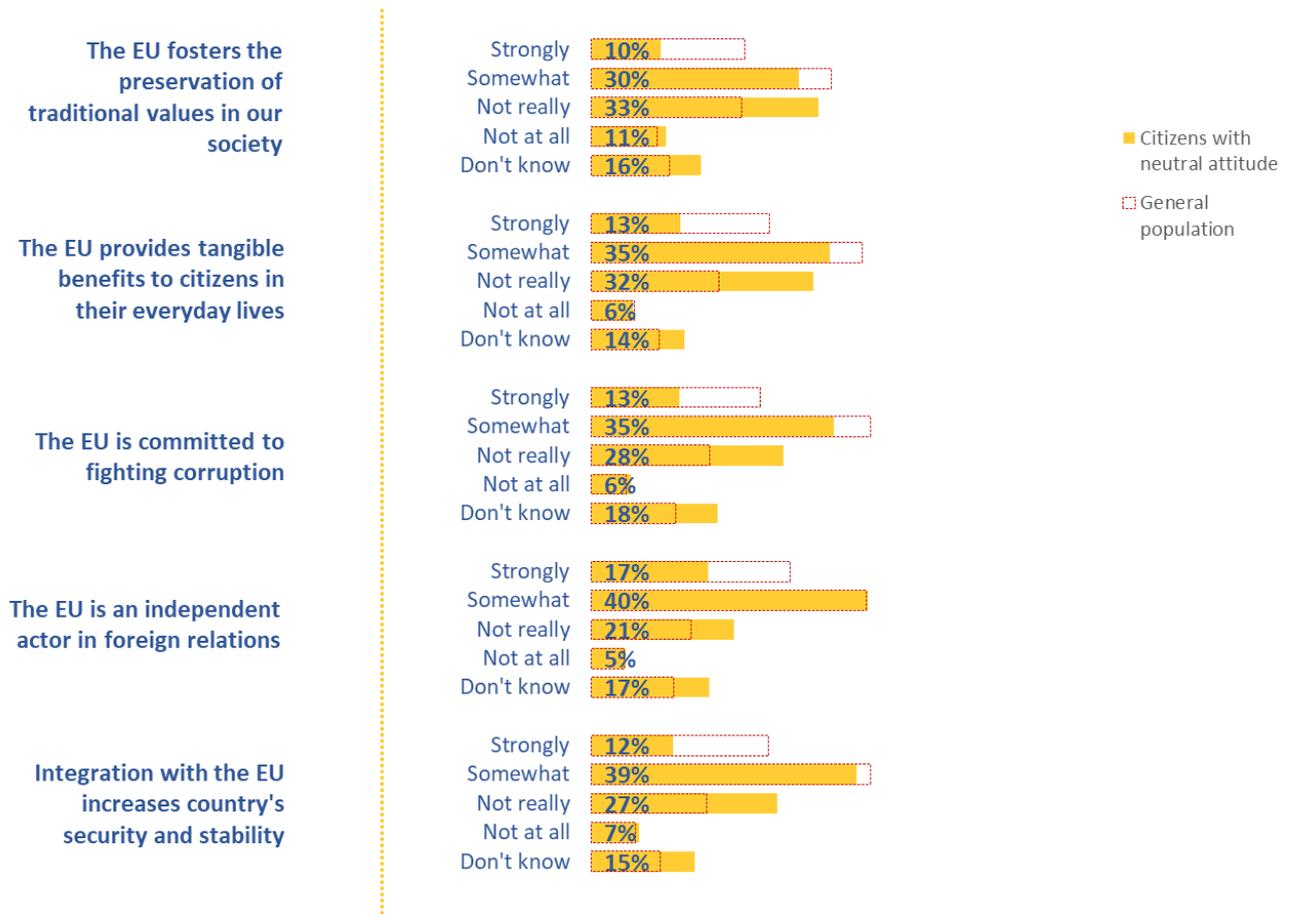
The assessment of the relations between EaP countries and the EU and the acknowledgement of the EU’s financial support is again less positive than for EU supporters: only 60% of ‘neutral’ citizens would describe the relations between their country and the EU as ‘good’, 46% acknowledge EU’s financial support and 39% of them consider it as effective (versus 83%, 66% and 59% respectively for EU supporters).

FIGURE 47 – Attitudes towards the EU among EaP country residents with a neutral image of the EU



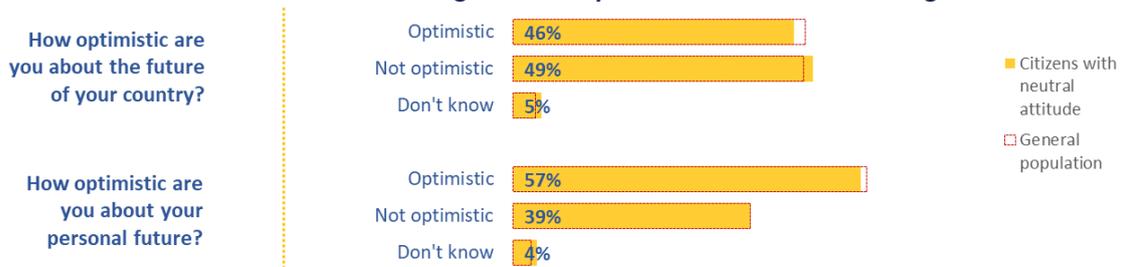
When it comes to the assessment of common beliefs, individuals holding a neutral image of the EU are again less positive than both EU supporters – in fact, the level of agreement for all statements does not exceed 57% (85% for EU supporters). The highest share of approval was recorded for the statements that ‘the EU is an independent actor in foreign relations’ (57%); at the opposite end, only 40% of neutrally oriented citizens agreed with the fact that ‘the EU fosters the preservation of traditional values in our society’. Given that neutrally oriented citizens are more likely to be users of Russian media, it is probable that they are more influenced by anti-western narrative conveying the message that Europeanisation is a threat to national culture and identity than EU supporters and, in general, the overall population.

FIGURE 48 – Common beliefs of EaP country residents with a neutral image of the EU



Levels of optimism are not so high among neutrally oriented citizens – and particularly with regard to the future of their country (49% are ‘not optimistic’). In fact, they seem much more concerned than EU supporters of the current economic situation and all related issues such as ‘low salaries and pensions’ (47%), ‘low living standards and poverty’ (42%), ‘unemployment’ (42%) and ‘the economic crisis’ (33%). Around 25% of ‘neutral’ citizens also mentioned ‘high prices and taxes’ (27%) and 15% ‘the unaffordability of the healthcare’. These concern – which account for both their greater pessimism and their more indifferent view towards the EU – call in the direction of more inclusive economic policies.

FIGURE 49 – View of the future among EaP country residents with a neutral image of the EU



4. Annex

TABLE A1 – Knowledge of specific programmes by country

Q2.6.1. Which specific programme(s) do you know? (Multiple answers possible)							
	Armenia	Azerbaijan	Belarus	Georgia	Moldova	Ukraine	EaP Total
Education programmes	32%	65%	52%	41%	37%	51%	48%
Health and medicine programmes	18%	41%	39%	38%	29%	39%	37%
Infrastructure development projects	7%	14%	21%	40%	61%	22%	26%
Cultural programmes	12%	16%	48%	10%	15%	27%	24%
Economic reforms/business promotion	14%	29%	18%	21%	17%	25%	23%
Energy efficiency programme and global warming programme	4%	2%	15%	3%	8%	32%	23%
Justice reforms/police reforms	9%	9%	5%	5%	15%	28%	21%
Agricultural and rural development programmes	21%	29%	9%	25%	19%	11%	14%

Percentages refer to EaP country residents who were aware of the EU's financial support

TABLE A2 – EU financial support compared to that of other institutions by country

Q2.7. As far as you know, for each of the following international institutions or foreign countries, would you say that it provides more, the same, or less financial support to your country than the European Union?								
		Armenia	Azerbaijan	Belarus	Georgia	Moldova	Ukraine	EaP Total
United States	More	23%	8%	7%	31%	6%	14%	13%
	The same	25%	9%	36%	27%	24%	37%	32%
	Less	32%	26%	36%	13%	48%	32%	32%
	Don't know	20%	57%	21%	29%	22%	17%	23%
	Total	100%	100%	100%	100%	100%	100%	100%
United Nations or one of its agencies	More	22%	9%	11%	14%	3%	15%	13%
	The same	27%	10%	44%	30%	20%	39%	35%
	Less	22%	20%	23%	14%	42%	24%	24%
	Don't know	29%	61%	22%	42%	35%	22%	28%
	Total	100%	100%	100%	100%	100%	100%	100%
Russian Federation	More	45%	16%	60%	3%	19%	6%	17%
	The same	18%	10%	25%	5%	18%	14%	15%
	Less	23%	23%	8%	47%	47%	55%	43%
	Don't know	14%	51%	7%	45%	16%	25%	25%
	Total	100%	100%	100%	100%	100%	100%	100%
International Monetary Fund / World Bank	More	34%	20%	18%	22%	8%	35%	29%
	The same	25%	8%	47%	26%	30%	42%	37%
	Less	15%	16%	15%	9%	29%	9%	12%
	Don't know	26%	56%	20%	43%	33%	14%	22%
	Total	100%	100%	100%	100%	100%	100%	100%

Percentages refer to EaP country residents who have heard of the EU

TABLE A3 – Benefits from current EU support

Q2.8. To what extent would you say that your country has benefitted from the current European Union support in the following areas? (Percentage of the population who answered 'very much' or 'fairly')							
	Armenia	Azerbaijan	Belarus	Georgia	Moldova	Ukraine	EaP Total
Improved democracy	59%	38%	30%	42%	39%	31%	34%
Greater economic development	57%	44%	34%	30%	34%	26%	31%
Access to more products and services	61%	54%	54%	49%	46%	58%	56%
More tourism	68%	70%	58%	85%	48%	58%	61%
Improved infrastructure	49%	48%	39%	54%	48%	30%	37%
Improved trade	53%	63%	57%	43%	41%	54%	54%
Better education	59%	59%	43%	48%	48%	36%	42%
Greater employment opportunities	43%	28%	41%	28%	40%	44%	41%
Improved agricultural production	50%	52%	28%	33%	36%	30%	33%
Less corruption	48%	25%	20%	28%	23%	19%	22%
Better law enforcement	53%	47%	28%	32%	31%	37%	37%
Improved quality of healthcare system	61%	44%	36%	57%	43%	30%	36%
Improved quality of the justice system	46%	44%	24%	57%	29%	26%	30%

Percentages refer to EaP country residents who have heard of the EU

TABLE A4 – 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. (Three most important areas)							
	Armenia	Azerbaijan	Belarus	Georgia	Moldova	Ukraine	EaP Total
Improved democracy	16%	10%	14%	13%	13%	16%	15%
Promote economic development	47%	26%	50%	49%	35%	57%	50%
Promote access to more products and services	5%	4%	20%	2%	8%	11%	10%
Increase tourism	22%	25%	25%	12%	8%	10%	14%
Improved infrastructure	7%	7%	13%	14%	34%	19%	17%
Improved trade	13%	20%	29%	8%	14%	10%	14%
Promote better education	35%	41%	26%	36%	22%	18%	23%
Create greater employment opportunities	26%	41%	40%	41%	30%	31%	34%
Improve agricultural production	26%	14%	12%	29%	12%	22%	19%
Reduce corruption	21%	19%	9%	11%	52%	40%	32%
Promote better law enforcement	5%	6%	17%	12%	13%	15%	13%
Improve quality of healthcare system	42%	21%	30%	39%	37%	27%	29%
Improve quality of the justice system	19%	4%	4%	18%	15%	8%	8%

Percentages refer to EaP country residents who have heard of the EU

TABLE A5 – Media usage frequency

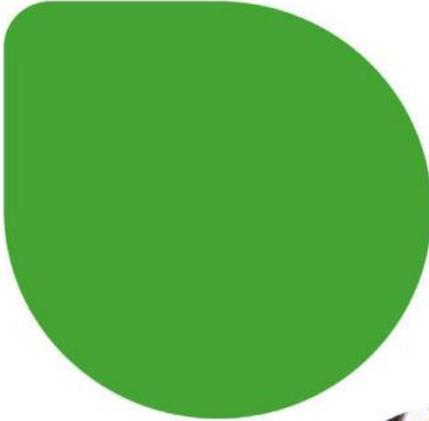
Q3.7. & Q3.8. How frequently would you say that you use the following? (Percentage of population who answered 'always' or 'often')							
	Armenia	Azerbaijan	Belarus	Georgia	Moldova	Ukraine	EaP Total
Television	78%	89%	62%	76%	69%	58%	65%
Word of mouth	62%	41%	64%	44%	36%	40%	46%
Internet	62%	52%	54%	40%	62%	39%	44%
Social media	57%	41%	42%	44%	37%	35%	38%
Print media	12%	6%	23%	9%	17%	19%	17%
Radio	20%	13%	22%	6%	25%	13%	14%
Official EU websites	8%	2%	3%	4%	11%	9%	7%
Country's media in national language	84%	86%	22%	78%	69%	60%	60%
Country's media in Russian	41%	22%	70%	7%	54%	45%	44%
Foreign media in Russian	39%	23%	46%	9%	33%	23%	27%
Country's media in other languages	20%	16%	3%	7%	14%	10%	10%
Foreign media in other languages	16%	20%	3%	8%	14%	7%	9%

TABLE A6 – Trust towards different types of media

Q3.9. & Q3.10. Which is your level of trust for the following media as a source of information? (Percentage of population who answered 'Tend to trust')							
	Armenia	Azerbaijan	Belarus	Georgia	Moldova	Ukraine	EaP Total
Television	70%	62%	59%	69%	49%	47%	53%
Internet	49%	35%	60%	45%	48%	49%	49%
Social media	41%	23%	49%	42%	33%	41%	40%
Radio	37%	22%	48%	20%	31%	24%	28%
Print media	34%	20%	51%	25%	31%	32%	33%
Official EU websites	23%	5%	28%	21%	29%	30%	26%
Word of mouth	53%	31%	79%	49%	38%	59%	57%
Country's media in national language	74%	65%	50%	67%	48%	52%	55%
Country's media in Russian	49%	22%	35%	14%	41%	38%	39%
Foreign media in Russian	39%	22%	50%	15%	30%	29%	31%
Country's media in other languages	27%	17%	15%	15%	21%	20%	20%
Foreign media in other languages	23%	21%	35%	15%	26%	18%	19%

TABLE A7 – Most pressing problems in EaP countries

Q4.2. What do you consider to be the most pressing problems facing your country?							
	Armenia	Azerbaijan	Belarus	Georgia	Moldova	Ukraine	EaP Total
Low living standard, poverty	34%	26%	39%	34%	33%	46%	41%
Low salaries / pensions	25%	42%	60%	27%	54%	37%	40%
Unemployment	50%	67%	37%	79%	34%	31%	40%
Economic crisis	25%	11%	40%	38%	23%	30%	29%
Security issues / war	19%	20%	6%	4%	1%	39%	28%
Corruption	16%	18%	20%	6%	47%	27%	24%
High prices and taxes	13%	16%	44%	26%	25%	21%	24%
Unaffordability of healthcare	18%	9%	14%	16%	13%	15%	14%
Territorial conflicts	6%	24%	4%	22%	2%	8%	10%
Absence of rule of law	9%	4%	7%	10%	8%	5%	6%
Education quality	15%	12%	7%	16%	12%	2%	6%
Migration	10%	1%	5%	8%	29%	5%	6%



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