



**ANNUAL SURVEY REPORT:
REGIONAL OVERVIEW**

5th Wave (Spring 2020)

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

MARCH 2020

**#
STRONGER
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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

In February 2020, a fifth 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 **5th wave of annual surveys** (Spring 2020 – **before COVID-19 crisis**) conducted in **the EaP region**¹ and is organised 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 5th wave of the survey, also provide comparisons between the findings of the 2019, 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 (field work) took place between February and March 2020 (before COVID-19 crisis), following the same methodology adopted in the previous rounds of data collection (Spring 2019, 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

- **Half of the population of the six EaP countries (49%, down 3% since 2019) has a positive image of the European Union (EU), around one third has a neutral stance (36%, up 2%) and only one tenth (11%, up 1%) feels negative about it. The awareness of the EU is also high – only 4% of the EaP population is ‘not aware of’ or has ‘never heard about the EU’ (down 6% since 2016).**
- **In Moldova (61%), Ukraine (51%) and Georgia (49%) – the three signatories of the Association Agreement (AA) – the majority of the population continues to be pro-EU. In Armenia too, attitudes towards the EU are mainly positive (53%) as a consequence of the Velvet Revolution, although its effects are gradually fading (down 9% since 2019). The situation is mostly stable in Azerbaijan (44%), where nevertheless more citizens are aware of the EU every year (only 12% of citizens have never heard of the EU, down 7% since 2017). Neutrality remains the most common attitude in Belarus (46%), followed by a ‘fair’ appreciation (28%).**
- **‘Peace, security and stability’ remains the primary value of the EaP population (65%),** reflecting the challenging geo-political position of their countries. Aside from Moldovans and Azerbaijanis – whose primary personal values are respectively ‘economic prosperity’ (52%) and ‘honesty and transparency’ (46%) – most Ukrainians, Armenians, Georgians and Belarusians mentioned it. At the same time, 69% of the EaP population ‘strongly’ or ‘very strongly’ associated it with the EU.
- **Most of the EaP population also associated the EU with all other values – especially ‘human rights’ and ‘economic prosperity’ (78% both) –** showing how individuals acknowledge the positive economic and democratic climate prevailing in the EU. **‘Absence of corruption’ continues to score the lowest level of positive associations with the EU (56%);** however, most citizens acknowledge the EU’s contribution to tackling corruption and this figure seems more linked to the fact that corruption is indeed a ‘chronic’ issue in the region.
- **The EU is the most trusted foreign institution and the only one trusted by the majority of EaP citizens (60%).** Trust is higher in Georgia (69%), Ukraine (66%), Moldova (63%) and Armenia (60%) and lower in Belarus (45%) and Azerbaijan (41%), where confidence in the EU and other foreign institutions is undermined by a lack of familiarity with their role. The highest levels of trust towards the EAEU were observed in the two member countries: Belarus (39%) and Armenia (51%).

EU relations with EaP countries and awareness of EU financial support

- **Nearly 70% of EaP citizens describe the relations between their country and the EU as ‘fairly good’ (54%) or ‘very good’ (12%).** Armenians are the most positive (86%); at the opposite end is Belarus, where only 54% of citizens are convinced that the relations between their country and the EU are ‘good’. Except for Moldova (74%, up 6%) and Ukraine (64%, up 1%), perceptions in EaP countries are slightly less positive than in 2019. It should also be noted that 18% of Azerbaijanis did not comment on the quality of the relations or ‘were not aware’ of them.
- **Currently 57% of the EaP population knows that the EU financially supports their country (it was 54% in 2019).** Ukrainians (62%), Armenians (65%), Georgians (71%) and particularly Moldovans (82%) tend to acknowledge the EU’s financial support much more frequently compared to Belarusians (41%) and Azerbaijanis (30%).

- **If EaP citizens are aware of EU's financial support, most tend to consider it 'effective' (53%)** and the share of 'satisfied' citizens has increased in line with the upward historical trend (up 10% since 2016). Perceptions are the most positive in Armenia (80% of citizens who are aware of the EU's financial support, up 8%), Azerbaijan (76%, up 6%), Georgia (69%, up 7%) and Moldova (58%, up 5%), but **the largest increase was observed in Belarus, where 52% of citizens are currently convinced that EU's support has been 'effective' (up 11%)**, stopping the declining trend and realigning with the peak recorded in 2016 (56%).
- **Nearly half of EaP citizens who are aware of the EU's financial support know at least one specific programme financed by the EU (48%). Education programmes are the most recalled** in all EaP countries except Moldova **and more so each year** (55% of citizens aware of some specific programmes financed by the EU mentioned projects in this field, up 7% since 2019) attesting the continued participation of EaP citizens in Horizon 2020, Erasmus+ and EU Mobility Programme. In Moldova, 58% of citizens mentioned 'infrastructure development' programmes; in Ukraine, 25% of citizens mentioned 'energy efficiency/global warming' programmes.
- **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;** 27% of EaP citizens are also convinced that the IMF/World Bank are bigger providers of financial assistance than the EU; and around 15% that this is also the case for the UN and the United States. Conversely, only one quarter of EaP citizens feel that the Russian Federation supports their country to the same extent as the EU (13%) or more (13%), the only exception being Belarus (77%) and Armenia (61%), who have full membership in the EAEU and display the highest levels of trust towards it.
- **EaP citizens identify and rate the most positive effects of the EU's support in terms of greater movement of both people and products.** The fuelling of 'tourism' and 'trade', as well as the 'greater access to products and services' were the most mentioned areas, respectively by 63%, 55% and 60% of citizens. Around 40% of them also acknowledged the positive effects on 'education' (41%), 'employment opportunities' (37%) and 'infrastructure' (36%).
- **The increase in 'tourism' was well perceived in all countries – not only those where the visa-liberalisation was introduced – and particularly in Georgia (76%), Azerbaijan (69%) and Armenia (68%). The fuelling of 'trade' also touched upon non-signatories of the AA agreement, such as Armenia (60%) and Azerbaijan (56%), confirming the importance of the EU as a key trading partner of the EaP countries.** The positive effect on 'education' and 'infrastructure' was particularly well perceived in Armenia (60% both) and Georgia (55% and 64% respectively).
- **Half of EaP citizens would favour more support from the EU for 'economic development' (50%); and around one third for 'greater employment opportunities' (35%), in 'reducing corruption' (34%) and 'improving the quality of healthcare system' (33%).** The promotion of 'economic development' seems the primary area of intervention in Belarus (49%), Georgia (47%) and Ukraine (57%); 'the quality of education' is key for Azerbaijanis (46%) while Moldovans would preferably target 'corruption' (45%) and improve 'the quality of the healthcare system' (43%).

Media usage as sources of information

- **Television' and 'word of mouth' continue to be the most popular sources of information in EaP countries:** only 11% and 15% of the population respectively 'never' rely on them. **EaP citizens are also increasingly turning to the Internet and social media regularly:** around half of them 'always' or 'often' use them versus around 10% who use 'print press' and/or the radio. As for the official EU website, only 14% of residents of the EaP countries use it 'always', 'often' or sometimes.
- Due to varying degrees of media space restriction and polarisation, the **vast majority of people in the EaP countries continue to rely on their country's media, either in the national language** (only 12% 'never' rely on them) **or Russian** (26%). Foreign media in Russian are used by 53% of EaP citizens (up 6% since 2019), and particularly in those countries where Russian is widely

spoken by the population and/or Russian TV channels are more easily available for free, such as Moldova (66%), Belarus (65%) and Armenia (56%). Media in other languages are ‘never’ used by around 80% of EaP citizens – less than 10% use them ‘always’.

- **Word of mouth’ appears to be the most trusted source of information (62%)** – particularly in Belarus (74%) and Ukraine (70%). **Country’s media in the national language are the second front runner (58%)** – especially in Armenia (70%) – **followed closely by Internet (53%) and the television (51%)**. Social media is trusted by 45% of EaP citizens (up 5% since 2019); whereas other traditional sources of information – such as print media and the radio collect lower levels of trust each year (30% and 24%, down 3% and 4% respectively). **Trust in the official EU website is basically stable (27% of EaP residents) – peaking in Ukraine at 32%**.

Sources of information about the EU

- **Around half of the EaP citizens (53%) state they have seen or heard some information about the EU in last three months preceding the survey.** Passive exposure continues to be quite common in Moldova (69%) and, to a lesser extent, in Ukraine (58%) and Belarus (54%), whereas only around 40% of Georgians and Armenians and around 30% of Azerbaijani were recently reached by EU-related information.
- **Almost half of EaP citizens (47%) 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 (54%). Most residents in all countries except Belarus are satisfied with the quality of the EU-related information they can access. The most significant increase in figures was observed in Azerbaijan (59%, up 12%).
- **Levels of ‘active’ exposure across the EaP region are slowly increasing across waves and half of citizens look for or access information on the EU** – 16% ‘frequently’ or ‘very frequently’ and 34% ‘sporadically’ (versus 29% and 9% respectively in 2016). **EU-related information is increasingly targeted through new media** – the Internet (61% of ‘active searchers’, up 8%) and social media (40%, up 11%). By contrast, ‘active’ exposure linked to TV usage has largely declined (40%, down 17%).
- Moldovans are the most likely to access information on the EU (65%; of which 27% ‘frequently’), possibly due to the high figures of passive exposure (69%). ‘Active’ exposure has increased in Azerbaijan (48%, up 6%), mainly kept stable in Ukraine (53%) and Georgia (48%) and dropped in Armenia, where 47% of citizens never accessed any information on the EU (versus 39% in 2019). In Belarus, only 28% of citizens access/search for information on the EU.
- **Nearly half of EaP citizens who search for information about the EU use Russian (49%) or their national language (47%)** – only 3% do so in English. The usage of Russian is particularly common among Belarusian (95%) and Ukrainian (57%) ‘active searchers’. On the contrary, most Azerbaijanis (83%), Georgians (74%) Armenians (67%) and Moldovans (65%) who access EU-related information do it in their national language – with only between 11% and 25% using Russian and less than 10% English.
- Around 40% of ‘active searchers’ looked for ‘general information about the EU’; around one third for ‘the EU relations with [their] home country’, ‘social and political news’, and ‘lifestyle in the EU’. Between 20% and 30% searched for ‘economic news’, ‘opportunities offered by the EU’ and ‘educational and cultural programmes.’ Moldovans display strong and varied interests – with over 28% of ‘active searchers’ targeting nearly all thematic areas; Georgians, Armenians and Azerbaijani are mostly interested in ‘educational and cultural programmes’ (around 36%); while Ukrainians and Belarusians are into more general information, including ‘lifestyle’ (around 40%).

View of country's current situation

- **Trust levels towards the different institutions and political parties in the EaP region remain quite low** and the religious authority is the only authority trusted by the majority of citizens (52%). Regional and local public authorities are trusted by 43% of EaP citizens (but distrusted by 48%), followed by the Government (41% versus a 50% distrust rate) and the Parliament (32% versus 59%). Only 24% of citizens trust their political parties.
- **Accordingly, only 33% of EaP citizens appear to be 'satisfied' with the way democracy works in their country**, with no significant change compared to 2019. Levels of satisfaction have kept mostly stable in Armenia (68%), Azerbaijan (49%), Georgia (22%) and Ukraine (31%) – and in line with findings observed for levels of trust. **Dissatisfaction has increased in Belarus (56%, up 5%) – as well as in Moldova (78%, up 2%), which remains the most dissatisfied of all EaP countries.**
- **The only elements that most EaP citizens feel apply to their country are 'gender equality' (60%, down 2% since 2018) and 'freedom of speech' (54%, up 4%), with no significant change since 2019.** The hierarchy of the other elements that EaP citizens believe apply to their country is also largely consistent with last year's findings and the issue of **'corruption' is still the most critical – 46% of EaP citizens (up 6%) say it 'definitely' does apply to their country, with peaks of 57% in Moldova.** On average, Armenians provided the most positive assessment, which is impressive considering that in 2018 the majority of the population acknowledged that only 'freedom of the media' and 'freedom of speech' were guaranteed in Armenia.

Future expectations

- **Most EaP citizens are not optimistic about the future of their country (51%).** Expectations are mostly stable in Belarus, Georgia and Ukraine; Moldovans and, primarily, Azerbaijani appear more concerned about their countries' future; while Armenians are the most optimistic, reflecting their hopes following the Velvet revolution. Optimism towards personal futures is more common (60%) and slightly increasing across waves (it was 58% last year and 51% in 2016).
- **'Low living standards and poverty', 'unemployment' and 'low salaries and pensions' are the most pressing concern for the EaP population (41%, 38% and 35% respectively).** One quarter of citizens also mentioned 'security issues and war' – with peaks among Ukrainians (37%), Armenians (17%) and Azerbaijani (18%) – and 10% 'territorial conflicts' – with peaks among Azerbaijani (30%) and Georgians (19%). Despite the unresolved dispute over Transnistria, these issues are not a main concern for Moldovans, whose priorities remain 'low salaries and pensions' (59%), 'corruption' (41%), and 'low living standards and poverty' (41%).

Profiling attitudes towards the EU: positive versus neutral

- **Citizens with a positive view of the EU account for almost half of all EaP citizens (49%, down 3% since 2019).** Compared to the general population of the EaP region, they tend to be slightly more concentrated among the younger age groups (40%), the most educated (41%) and native speakers of their national language (77%).
- **EaP citizens with a neutral view of the EU account for roughly one third of the population (36%, up 2% since 2019).** 'Neutral' citizens are more likely to be middle-aged (38%), have a lower level of education (70%) and be native Russian speakers (31%).

- **Passive exposure to EU-related information among ‘neutral’ citizens is low** – 41% versus 64% of EU supporters – **and their interest in EU-related matters is even more limited:** only 9% of ‘neutral’ citizens frequently search for information on the EU and 34% does it ‘sporadically’ (versus 24% and 37% respectively for EU supporters). In fact, if actively searching, neutral citizens display lower levels of interest for all other EU-related matters than the EU supporters and only ‘general information’ was more searched by them (44% versus 37%).
- **Around half of neutral citizens are frequent users of new media** (53% versus 71% of EU supporters); **around one third exclusive users of traditional media** (33% versus 22%), **and 14% do not frequently rely on any media at all** (versus 7%). If searching for EU-related information, **55% of neutrally oriented citizens use Russian, 43% their national language and only 2% English** – the respective figures for EU supporters are 43%, 51% and 4%.
- Levels of exposure impact on all other perceptions and EU supporters share a higher level of confidence in all foreign institutions and a much stronger and more positive vision of the EU and its financial support. Only 46% of ‘neutral’ EaP citizens trust the EU, 58% describe the relations between their country and the EU as ‘good’, 45% acknowledge EU’s financial support and 37% of them consider it as effective (versus respectively 84%, 82%, 72% and 65% among EU supporters).
- In addition, while most neutrally oriented individuals agree with all five statements on common beliefs, they tend to be far less positive than EU supporters and their levels of agreement do not exceed 62% (84% for EU supporters). The highest share of approval was observed for the statement ‘the EU is an independent actor in foreign relations’ (62%); at the opposite end, only 51% of neutrally oriented citizens agreed with the statement that ‘EU’s commitment to fighting corruption’, ‘the EU provides tangible benefits to citizens in their everyday live’ and ‘the EU fosters the preservation of traditional values in their society’.
- Levels of optimism are accordingly not so high among ‘neutral’ citizens – and particularly regarding the future of their country (57% are ‘not optimistic’, up 8% since 2019). In fact, they seem much more concerned than EU supporters with the current economic situation and all related issues such as ‘unemployment’ (41%), ‘low salaries and pensions’ (38%), ‘high prices and taxes’ (27%) and ‘the unaffordability of the healthcare’ (21%).

3.2. Perceptions of the European Union

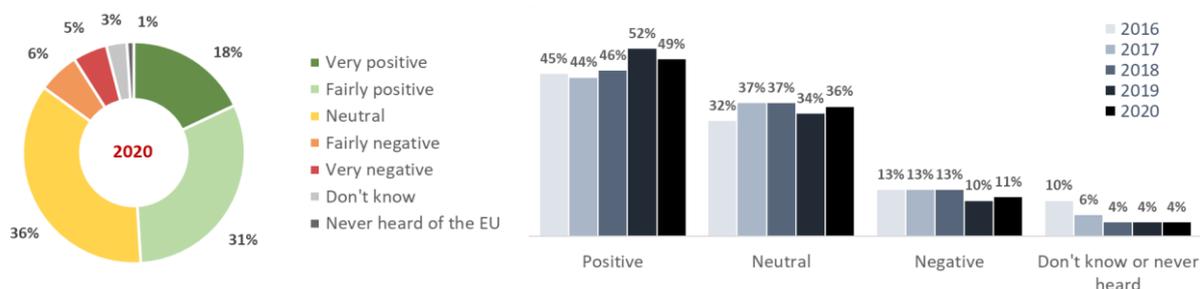
Half of EaP citizens have a positive image of the European Union (49%), 36% feel neutral about it and only 11% hold a negative view. In fact, neutrality remains the most common attitude only in Belarus (46%). Overall, only 4% of people are not aware of or have never heard about the EU and awareness is at its peak even in Azerbaijan (88%, up 7% since 2017). The EU is the most trusted international institution and the only one trusted by the majority of EaP citizens (60%), 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 (69%) and the lowest in Azerbaijan (41%), where confidence in the EU and other foreign institutions is undermined by the unfamiliarity of their role. Around 70% of EaP citizens also believe that relations between their country and the EU are ‘good’ and around 60% 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’ (63%), with a peak of 68% in Ukraine. As in previous waves, the main positive effects of the EU’s support (and closer integration with it) are ‘tourism’ (63%), ‘trade’ (55%) and ‘greater access to products and services’ (60%). The positive effects on ‘education’ and ‘infrastructure’ were particularly well perceived in Armenia and Georgia.

3.2.1. General perceptions of the EU

Half of the population of the six EaP countries (49%, down 3% since 2019) has a positive image of the European Union (EU), around one third has a neutral stance (36%, up 2%) and only one tenth (11%, up 1%) feels negative about it. The awareness of the EU is very high – only 4% of the EaP population is ‘not aware of’ or has ‘never heard about the EU’ (down 6% since 2016).

In Moldova (61%, up 6% since 2019), Ukraine (51%, down 5%) and Georgia (49%, down 1%) – the three signatories of the Association Agreement (AA) – the majority of the population continues to be pro-EU. In Armenia too, attitudes towards the EU are mainly positive (53%) possibly due to the consequences of the Velvet Revolution that brought a significant shift in perceptions, although its effects are slightly fading (down 9% since 2019). The situation is mostly stable in Azerbaijan (44%, down 2%), where more citizens are also aware of the EU every year (only 12% of citizens provided a ‘don’t know’ response or have never heard of the EU, down 7% since 2017)⁵. Neutrality remains the most common attitude in Belarus (46%), followed by a ‘fair’ appreciation (28%). Still, Belarusians are well aware of the European Union (EU) and only 4% of them have no opinion or have never heard of it.

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 27% 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

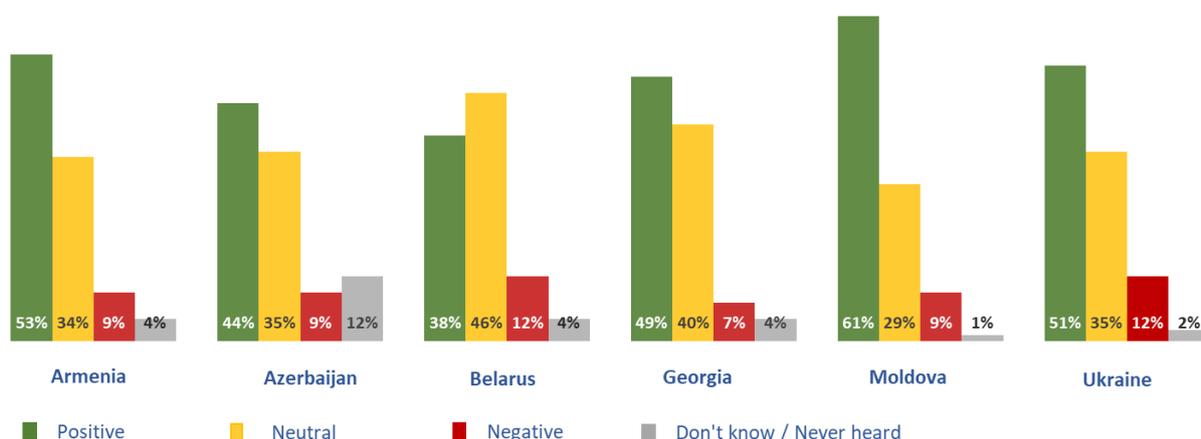


Figure 3 provides the rating of the values which are ‘strongly’ and ‘very strongly’ associated with the EU and that are most important at a personal level⁶. **For the fifth year in a row, ‘peace, security and stability’ is the primary value for 65% of the overall population**, reflecting the challenging geo-political position of EaP countries. In fact, aside from Moldovans and Azerbaijanis – whose primary personal values are respectively ‘economic prosperity’ (52%) and ‘honesty and transparency’ (46%) – nearly three quarters of Ukrainians (73%) and 61% of Armenians and Georgians and 58% Belarusians mentioned it⁷. At the same time, 69% 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 reveals that the EaP citizens perceive the EU as a solid and independent interlocutor able to support the EaP countries in easing tensions in the region, sustaining their territorial integrity and resolving frozen conflicts and territorial disputes⁸.

‘Human rights’ and ‘economic prosperity’ are second (37%) and third (34%) front runners as personal values; by contrast, ‘freedom of the media’, ‘respect for other cultures’, ‘freedom of religion’ and ‘democracy’ were mentioned each by less than 10% of EaP citizens, with no change since 2019.

As in previous waves, **most of the population tend to associate the EU with all values – especially ‘human rights’ and ‘economic prosperity’ (78% both)**. For the fourth year in a row, **‘absence of corruption’ has the lowest level of positive associations with the EU, possibly due to the fact that it is a ‘chronic’ issue in the region**⁹. Nevertheless, it is worth noting that, as the latest elections in Armenia, Moldova, and Ukraine have shown, the fight against corruption enjoys widespread popular support and these changes are often associated with increasingly close cooperation with the EU: despite being the weakest association, most EaP citizens link it ‘strongly’ or ‘very strongly’ with the EU (56%) and the EU’s contribution in tackling corruption is in fact well acknowledged by them (66%)¹⁰.

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 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. These conflicts are ‘frozen’ because despite negotiations, no real breakthrough has in fact taken place.

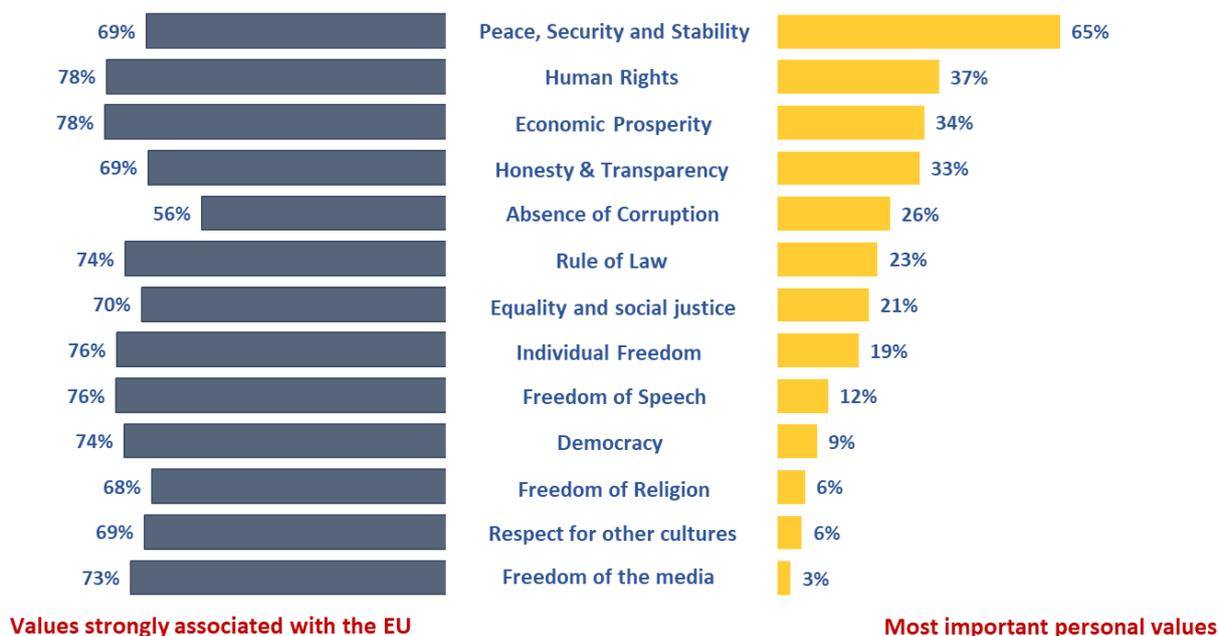
⁸ When explicitly asked if ‘integration with the EU will increase the country’s security and stability’, 64% of EaP citizens strongly or somewhat agreed. In addition, the EU is considered an ‘independent actor in foreign relations’ by 68% of EaP citizens. The attitude of citizens is most positive in Ukraine, where figures recorded peaks of 72% and 76% respectively.

⁹ According to Transparency International, Eastern Europe and Central Asia is the second-lowest performing region on the Corruption Perceptions Index (CPI), with an average score of 35 - scores range from zero (highly corrupt) to 100 (very clean). Across the region, countries experience limited separation of powers, abuse of state resources for electoral purposes, opaque political party financing and conflicts of interest. Of the six EaP countries, only two scored above the global average: Georgia (56) and Belarus (45). However, Armenia (42) has improved by seven points since 2018, following the Velvet revolution and the formation of a new parliament, whereas corruption (and limited separation of powers) remains an issue in Moldova (32), Azerbaijan (30) and Ukraine (30), despite change brought along by recent elections. (See: https://www.transparency.org/news/feature/cpi_2019_global_highlights).

¹⁰ When explicitly asked if ‘the EU is committed to fighting corruption’, 66% of EaP citizens ‘strongly’ or ‘somewhat’ agreed with the proposed statement and 32% would see favorably more support from the EU to ‘tackle’ the issue.

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)



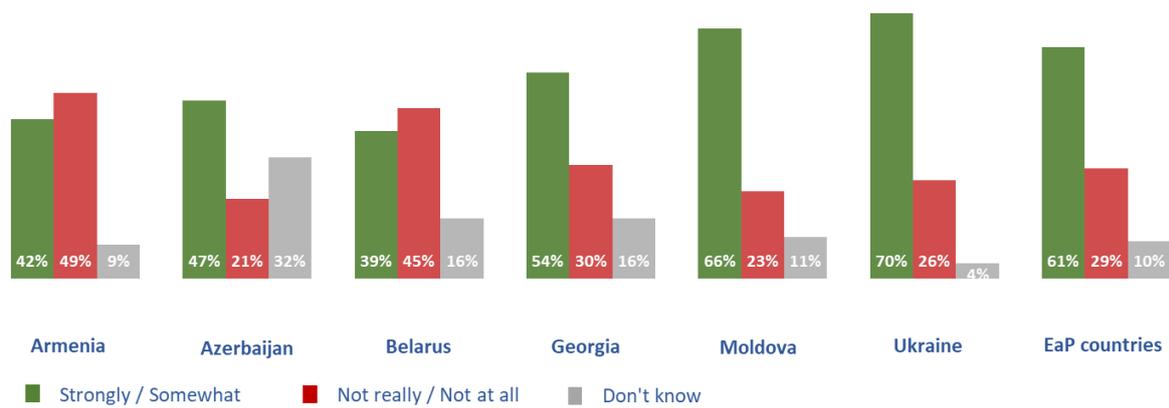
Most EaP citizens tend to agree with the proposed statements on common beliefs¹¹. However, confidence in the assumption that ‘the EU fosters the preservation of traditional values in [their] society’ is slightly lower (61% versus, for instance, 68% in the case of ‘the EU is an independent actor in foreign relations’). As a matter of fact, Ukrainians (70%), Moldovans (66%) and Georgians (54%) are those more inclined to agree with the statement; Azerbaijanis are split between agreement (47%) and unawareness (32%) or open disagreement (21%); and Belarusians and, particularly, Armenians are more pending towards disagreement (45% and 49% respectively). This finding seems consistent with the application of Russian ‘soft power’ in Armenia that argues that Russian ‘family values’ are closer to the (more conservative) traditional Armenian culture than the alien ‘European values’, which it is suggested pose a threat to the Church and the Armenian family unit¹².

¹¹ 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’.

¹² Despite the limitations and impediments to Russian disinformation, there is evidence of the application of Russian ‘soft power’ in the country driven by the efforts to promote the Russian language (as an official second language), the proposed renaming of streets, and erection of monuments glorifying the Soviet past, and an effective assault on ‘European values’. (Source: Disinformation and resilience in Eastern and Central Europe. Disinformation Resilience Index 2018).

**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?**

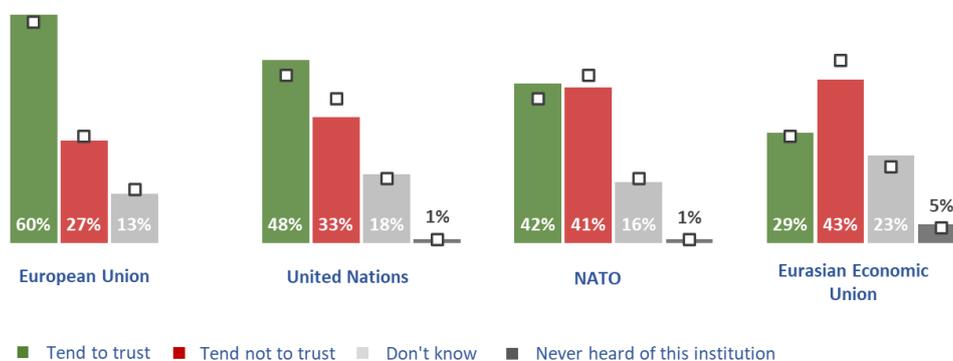
(Percentages refer to citizens who have heard of the EU)



The EU continues to be the most trusted foreign institution and the only one trusted by the majority of EaP citizens (60%, up 2%), confirming the finding that sees it ‘strongly’ or ‘very strongly’ associated with all positive values. Trust in the UN (48%, up 4%) and NATO (42%, up 4%) has increased compared to last year, reflecting the more favourable views observed in Ukraine compared to 2019 (up 7 and 5 percentage points respectively)¹³. No change was observed with regard to the Eurasian Economic Union (EAEU), which remains the least trusted foreign institution in the EaP region (29%).

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 frontrunner in this respect (69%), followed closely by Ukraine (66%), Moldova (63%) and Armenia (60%). Trust levels are lower in Belarus (45%) and Azerbaijan (41%), where confidence in all foreign institutions appears to be very low due to a widespread unfamiliarity of their role: between 25% and 32% of Belarusians and between 28% and 47% of Azerbaijanis did not answer the question or ‘had never heard of them’. Azerbaijanis and Belarusians are also mainly not confident in NATO (only 25%, and 23% of citizens respectively have trust in it) – together with Moldovans (21%) and Armenians (32%)

¹³ According to a poll conducted on June 2019 by Rating Group Ukraine on behalf of the International Republican Institute, the number of Ukrainians who support joining the North Atlantic Treaty Organization (NATO) has grown to the highest level since 2014, reaching 53%. When answering about the benefits of NATO membership, 44% of people who support joining the Alliance believe that it would defend Ukraine, 46% say it would help to increase the standards of Ukraine’s defense system and 6% say it would help to elevate the country’s international prestige. The idea of the referendum about joining NATO was brought to the public by President Zelensky back in March 2019 when he was campaigning for the presidency. Zelensky claimed that though he supports both joining NATO and the European Union, these issues should be decided by national referendum. See: <https://www.iri.org/resource/kyiv-post-cites-new-ukraine-poll-nato-support-grows-ukraine-reaches-53-percent>.

– and as opposed to Ukrainians (50%) and Georgians (59%). The highest levels of trust towards the EAEU were recorded in the two countries that have full membership: Belarus (39%) and Armenia (51%).

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

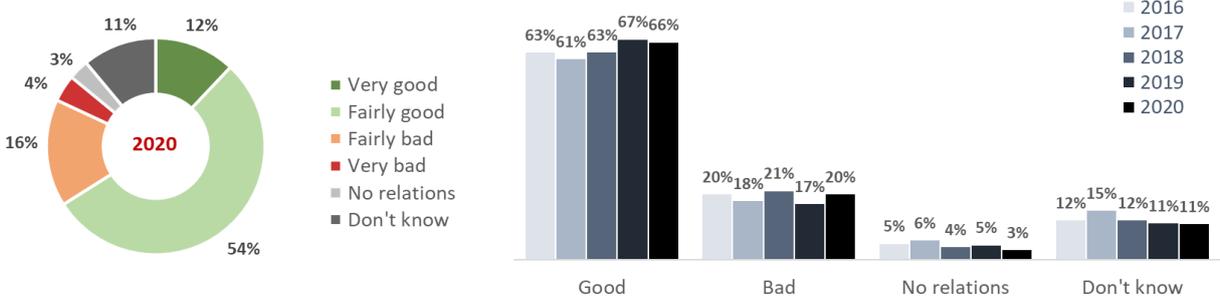
Q2.11. I would like to ask you a question about how much trust you have in certain institutions. (Percentage of the population who answered 'tend to trust')							
	Armenia	Azerbaijan	Belarus	Georgia	Moldova	Ukraine	EaP Countries
European Union	60%	41%	45%	69%	63%	66%	60%
United Nations	54%	31%	41%	57%	40%	52%	48%
NATO	32%	25%	23%	59%	21%	50%	42%
Eurasian Economic Union	51%	26%	39%	27%	33%	26%	29%

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 describe the relations between their country and the EU as ‘fairly good’ (54%) or ‘very good’ (12%), with no change compared to last year. The remaining population is nearly equally split between those who believe the relations to be ‘bad’ (20%) and those who did not comment on the quality of the relations (11%) or ‘were not aware of them’ (3%).

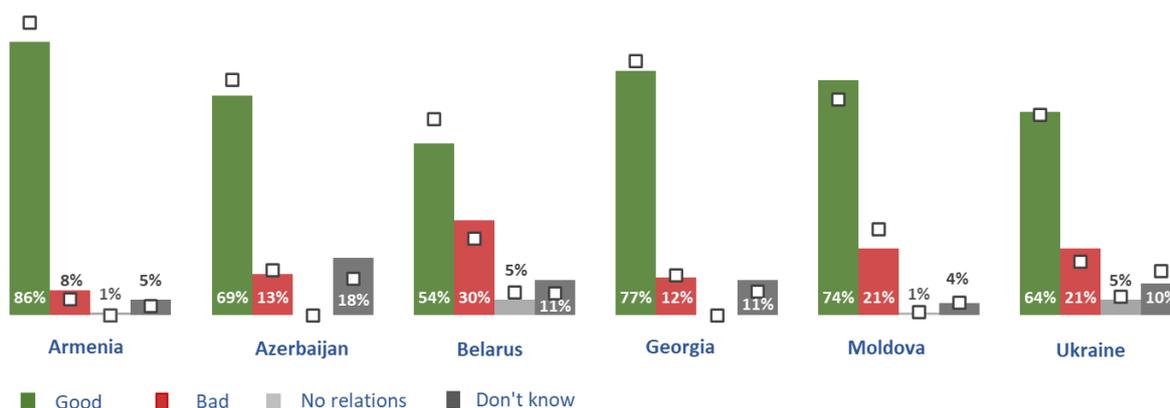
FIGURE 6 – In general, how would you describe the relations that the European Union has with your country? (Q2.4) – Regional overview
(Percentages refer to citizens who have heard of the EU)



Positive opinions were observed across all six EaP countries and across all socio-demographic groups. As in 2019, residents of Armenia (86%) perceive the relationship between the EU and their countries in the most positive light; at the opposite end is Belarus, where 54% of citizens are convinced that the relations between their country and the EU are ‘good’ and 30% that they are ‘bad’. Except for Moldova (74%, up 6%) and Ukraine (64%, up 1%), perceptions in EaP countries are slightly less positive than in 2019. It should also be noted that 18% of Azerbaijanis 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

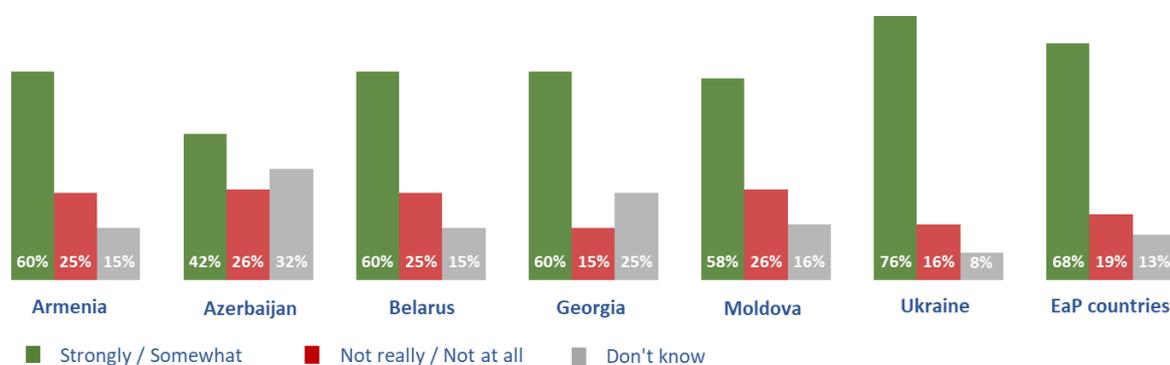
(Percentages refer to citizens who have heard of the EU)



Nearly 70% of EaP citizens are confident that ‘the EU is an independent actor in foreign relations’ (68%) with no change since 2019.¹⁴ Ukrainians are those more inclined to agree with the statement (76%) – with only 16% of citizens in open disagreement and 8% not commenting on the issue. Around 60% of citizens are convinced that ‘the EU is an independent actor in foreign relations’ in all other EaP countries except Azerbaijan. Azerbaijanis display the lowest level of agreement (42%) and the highest level of unawareness (32%). One quarter of Georgians also did not provide 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)

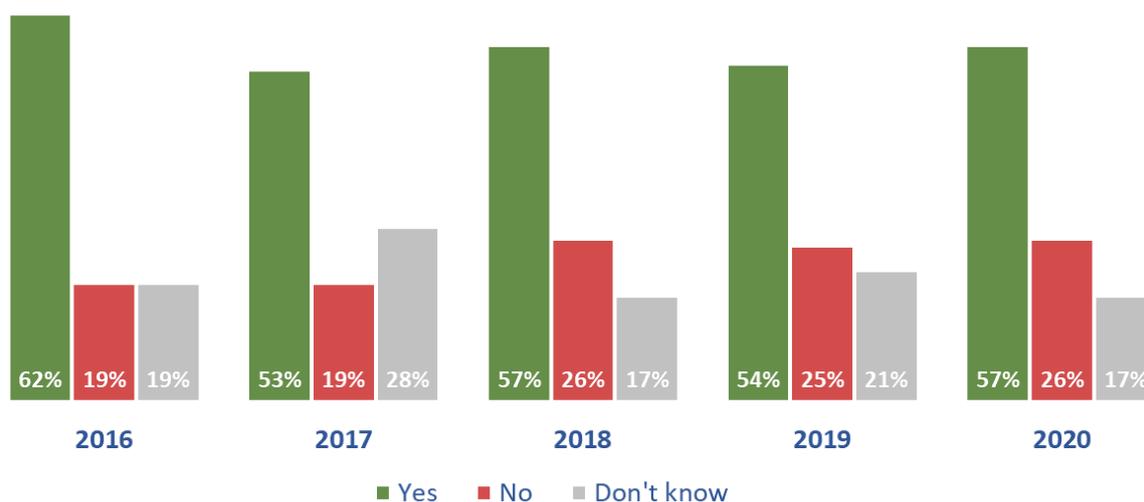


EaP citizens are only slightly more aware of the EU’s financial support compared to 2019 and currently **57% of the overall population know that the EU supports their country** (it was 54% last year).

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’.

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 (62%), Armenians (65%), Georgians (71%) and particularly Moldovans (82%) tend to acknowledge the EU’s financial support much more frequently compared to Belarusians (41%) and Azerbaijanis (30%). 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; in Azerbaijan, a large share of the population continues to be unable to provide a definite answer to this question (36%). By contrast, in Ukraine the share of individuals answering ‘do not know’ has nearly halved since last year (11%, down 9%).

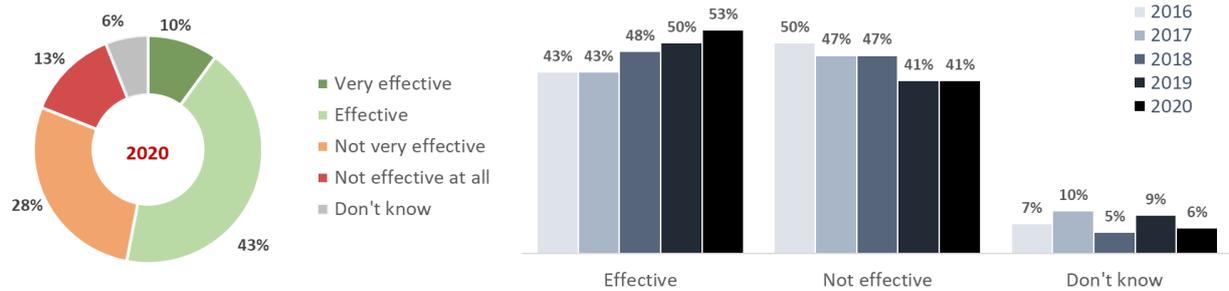
TABLE 2 – Provision of financial support by the EU

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	65%	30%	41%	71%	82%	62%	57%
No	17%	34%	33%	7%	6%	27%	26%
Don't know	18%	36%	26%	22%	12%	11%	17%
Total	100%	100%	100%	100%	100%	100%	100%

Percentages refer to citizens who have heard of the EU

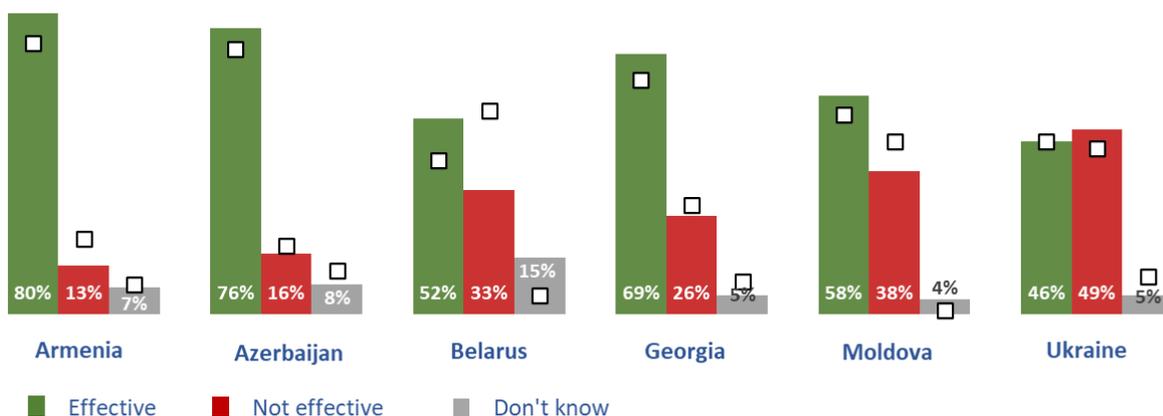
If EaP citizens are aware of EU’s financial support, most tend to consider it ‘effective’ (53%) and the share of ‘satisfied’ citizens has increased in line with the upward historical trend (up 10% since 2016).

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)



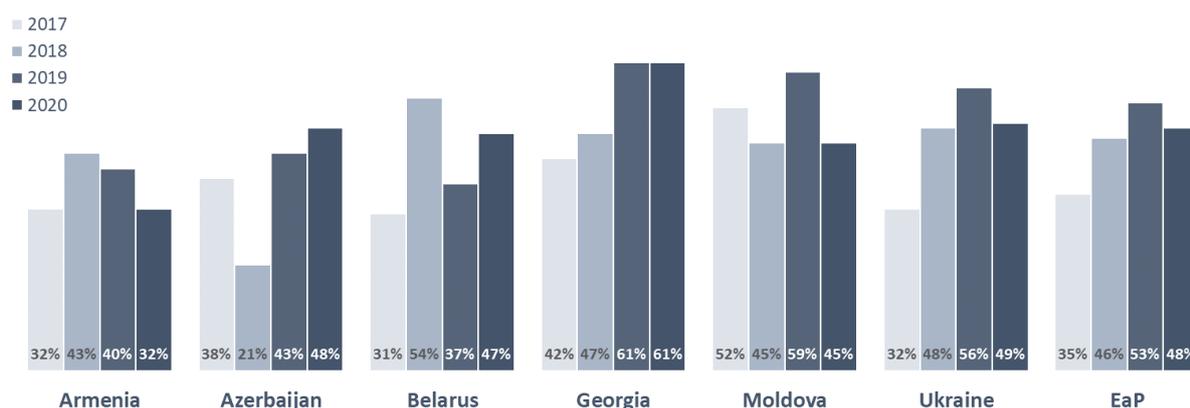
Among those who are aware of the EU’s financial support, perceptions on its effectiveness are the most positive in Armenia (80%, up 8%), Azerbaijan (76%, up 6%), Georgia (69%, up 7%) and Moldova (58%, up 5%). Ukrainians remain basically split (46% versus 49%), with no important change compared to 2019. But the largest shift was observed in Belarus, where 52% of citizens are currently convinced that EU’s support has been effective (up 11%), stopping the declining trend and realigning with the peak recorded in 2016 (56%).

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)



Nearly 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 (48%). Though it has slightly decreased compared to 2019 (down 5%), awareness of specific programmes remains high in Georgia (61%), Ukraine (49%) and Moldova (45%) and has increased in Azerbaijan (48%, up 5%) and, particularly, in Belarus (47%, up 10%). In fact, only in Armenia, less than one third of citizens who are aware of the EU’s financial support know about specific EU-funded programmes – and this figure is back at the 2017 level.

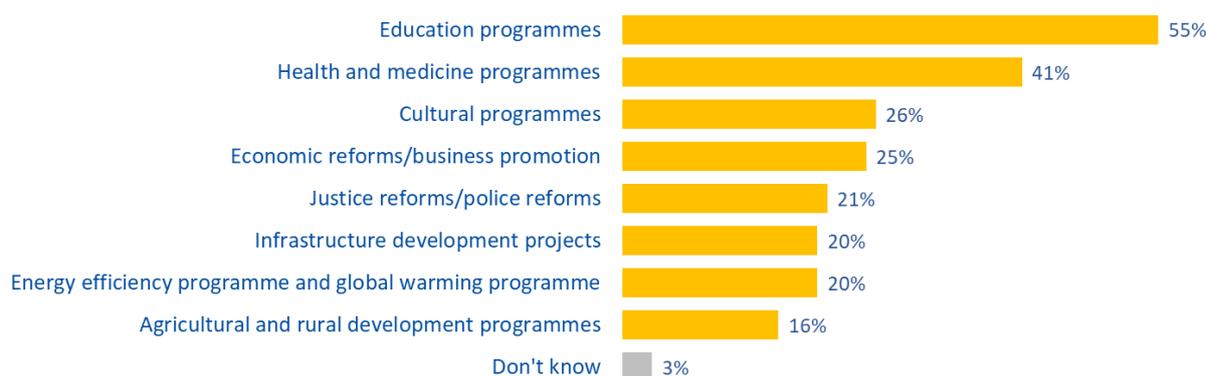
FIGURE 12 – Do you know of any specific programmes financed by the European Union in your country? (Q2.6) – Percentage of ‘Yes’ responses
(Percentages refer to citizens who were aware of the EU’s financial support)



The most recalled programmes are in the field of education and more so each year (55% of citizens aware of some specific programmes financed by the EU mentioned projects in this field, up 7% since 2019) – attesting the continued participation of EaP citizens in Horizon 2020, Erasmus+ and the EU Mobility Programme. These are in fact the most recognised programmes in all EaP countries except Moldova,¹⁵ with peaks of acknowledgement in Azerbaijan (71%), Belarus (59%) and Ukraine (58%). ‘Health and medicine programmes’ – the second front runners – were mentioned by 41% of EaP citizens; followed by programmes in the field of ‘culture’ (26%) and ‘economic reforms/business promotion’ (25%). ‘Infrastructure development’ programmes were mentioned by 20% of EaP citizens, with peaks of 58% of Moldovans¹⁶. One quarter 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 Programme funded by the EU and the European Bank of Reconstruction and Development¹⁷.

Only 7% of EaP citizens were personally involved with an EU-funded project in the past twelve months. At country level, stronger acknowledgement is reflected in stronger involvement: for instance, in Belarus where the acknowledgment of EU’s financial support has largely increased, the share of citizens who have participated in an EU-funded project in the last 12 months, though small, has nearly doubled (9%, up 5%).

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)



¹⁵ In Moldova, ‘infrastructure development projects’ are the most well-known programmes (58%), still ‘education programmes’ were mentioned by 43% of citizens (up 6%).

¹⁶ EU assistance has helped to achieve tangible improvements in people’s daily lives in Moldova. Several projects were completed, contributing to energy efficiency (biomass project), improved road infrastructure (building a bypass around the city of Ungheni), supported customs and border operations (the Palanca jointly operated border crossing point) and youth and educational exchanges (Erasmus+). On connectivity, energy efficiency, climate action, environment and civil protection, Moldova overall has recorded limited progress on implementing reforms in line with the AA/DCFTA. Source: Joint Association Implementation Report on Moldova, European Commission, 2019.

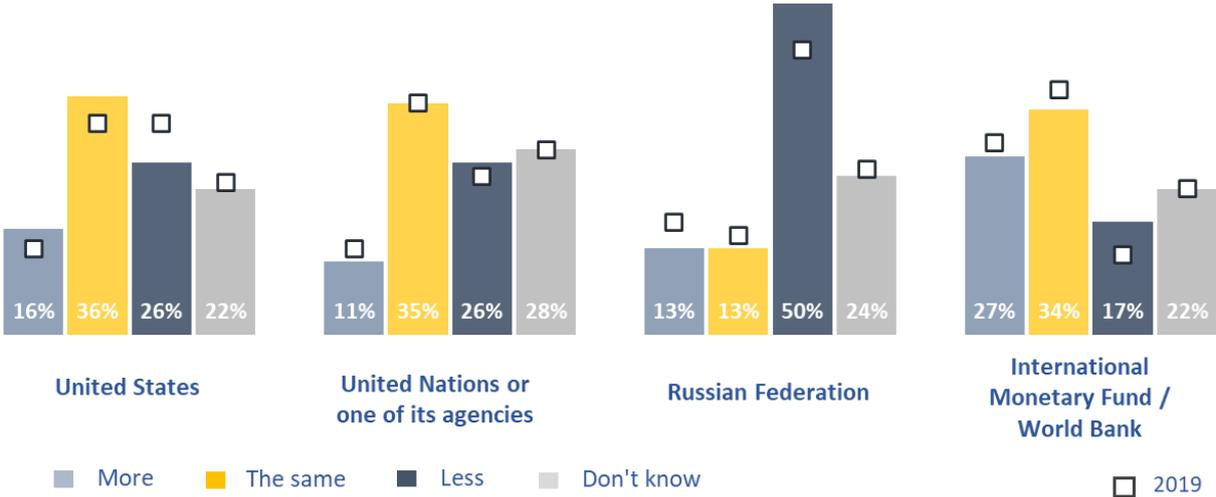
¹⁷ More details about country data are provided in Annex, Table A1.

EaP citizens were also asked to compare the support provided by different international donors with the support provided by the EU. In general, they display a low level of confidence in answering the question, with between 22% and 28% of individuals unable to provide a definite opinion. Azerbaijanis continue to be the least aware of the fact that the EU financially sustains their country, around 55% of them could not rate the extent of EU support in comparison to that provided by other international organisations¹⁸.

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; 27% of EaP citizens are also convinced that the IMF/World Bank are bigger providers of financial assistance than the EU; and 16% and 11% of them that this is also the case for respectively the UN and the United States. Conversely, only a quarter of EaP citizen feel that the Russian Federation supports their country to the same extent as the EU or more (13%), the only exception being Belarus (77%) and Armenia (61%), who have full membership in the EAEU and display the highest levels of trust towards it.

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)

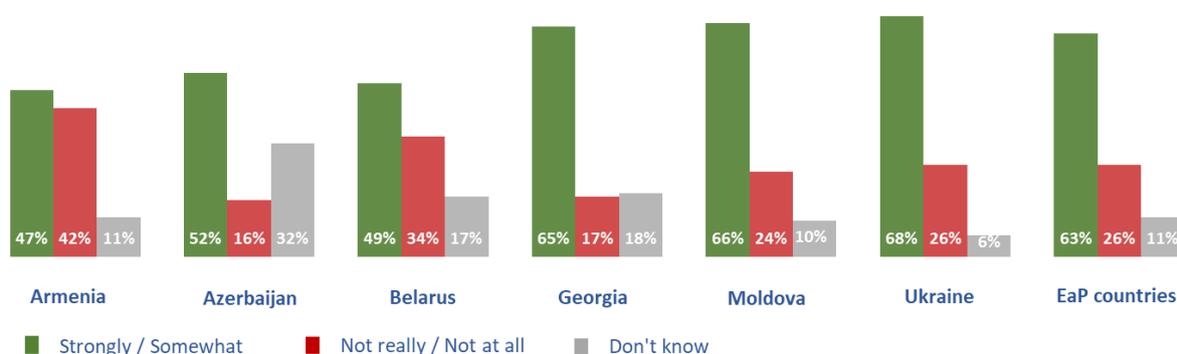


Most EaP citizens are confident that ‘the EU provides tangible benefits to citizens in their everyday lives’ and more so compared to 2018 (63%) with no relevant change since 2019¹⁹.

Levels of agreement are quite high in all EaP countries (between half and two thirds of the citizens agreed with the statement), with peaks of around 65% in Ukraine, Moldova and Georgia. Lower figures were again observed in the two member countries of the EAEU – in Armenia as many as 42% of citizens openly disagree with the statement; in Belarus it is 34%. It should also be noted that around one third of Azerbaijanis did not provide a definite opinion on the issue (32%).

¹⁸ More details about country data are provided in Annex, Table A2.
¹⁹ The third wave saw the introduction of a new set of questions, targeted at gaining greater insights into how the European 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 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)



EaP citizens identify and rate the most positive effects of the EU’s support in terms of greater movement of both people and products. The increase in ‘tourism’ and ‘trade’, as well as the ‘greater access to products and services’ were the most mentioned areas that had benefitted by the EU’s support, respectively by 63% (up 2%), 55% (up 1%) and 60% (up 6%) of them. Around 40% of citizens also acknowledged the positive effects on ‘education’ (41%), ‘employment opportunities’ (37%) and ‘infrastructure’ (36%).

The increase in ‘tourism’ was well perceived in all countries – not only those where the visa-liberalisation regime was introduced – and particularly in Georgia (76%), Azerbaijan (69%) and Armenia (68%). The fuelling of ‘trade’ also touched upon non-signatories of the AA agreement, such as Armenia (60%) and Azerbaijan (56%), confirming the importance of the EU as a key partner of the EaP countries in the trade of goods²⁰. The positive effect on ‘education’ and ‘infrastructure’ was particularly well perceived in Armenia (60% both) and Georgia (55% and 64% respectively)²¹.

EaP citizens were also asked to identify areas where they would like greater support from the EU²². As in 2019, around one in two EaP citizens mentioned the ‘economic development’ (50%); and around one in three cited ‘greater employment opportunities’ (35%), ‘reducing corruption’ (34%) and ‘improving the quality of healthcare system’ (33%). While the promotion of ‘economic development’ seems the most important area of intervention in Belarus (49%), Georgia (47%) and Ukraine (57%); Azerbaijanis would primarily favour a stronger support from the EU in ‘promoting better education’ (46%) and Moldovans seem more interested in the EU’s support in ‘tackling corruption’ (45%) and ‘improving the quality of the healthcare system’ (43%)²³.

²⁰ 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. *Source:* 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/>.

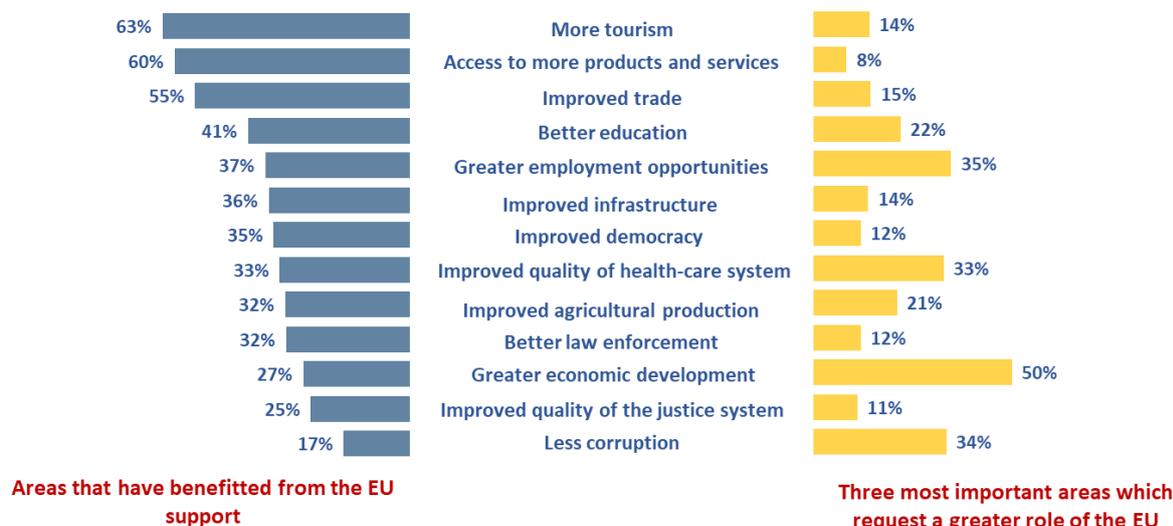
²¹ More details about country data are provided in Annex, Table A3.

²² Respondents were asked to name and rank the three most important areas in which the EU should play a greater role.

²³ More details about country data are provided in Annex, Table A4.

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)

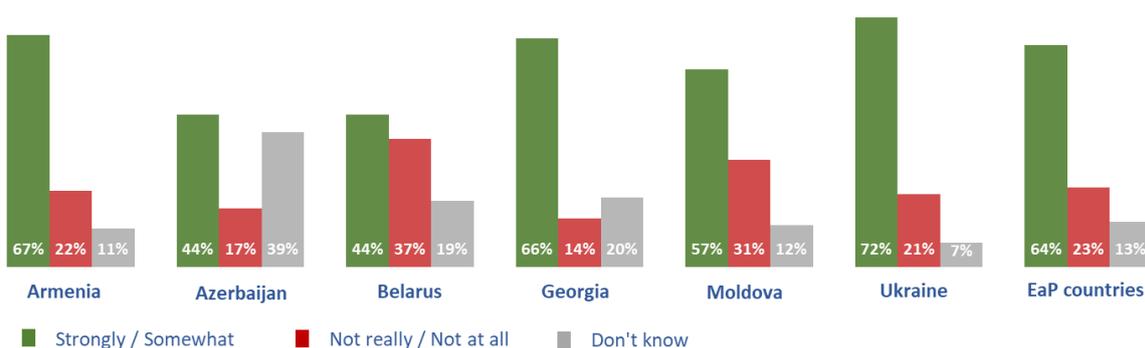
(Percentages refer to citizens who have heard of the EU)



When directly asked if ‘the EU is committed to fighting corruption’, most EaP citizens provided a positive answer (64%)²⁴ – with peaks among Ukrainians (72%), Armenians (67%) and Georgians (66%). 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.

FIGURE 17 – ‘The EU is committed to fighting corruption’.
To what extent do you agree with this statement about the EU?

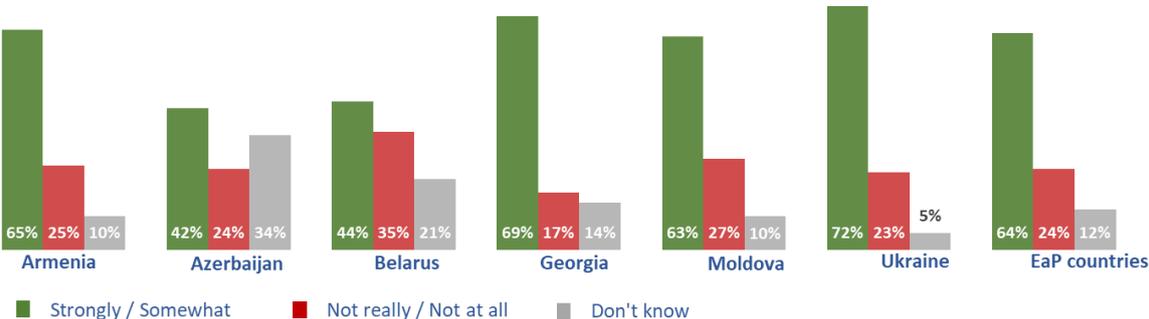
(Percentages refer to citizens who have heard of the EU)



²⁴ The third wave saw the introduction of a new set of questions, targeted at gaining greater insights into how the European 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’.

The same percentage of EaP citizens are confident that ‘integration with the EU increases the country’s security and stability’ (64%) – with only 12% of citizens who do not have a definite opinion (34% in Azerbaijan). Considering that ‘peace, security and stability’ is the primary personal value for the EaP population, this finding shows how a relevant share of the population sees the EU as an unbiased player contrary to other international organisations and particularly NATO. In fact, only Belarusians and Azerbaijanis are less convinced – though the relative majority of citizens is still oriented towards agreement (44% and 42% respectively) rather than disagreement (35% and 24% respectively).

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)



3.3. Sources of information on the EU

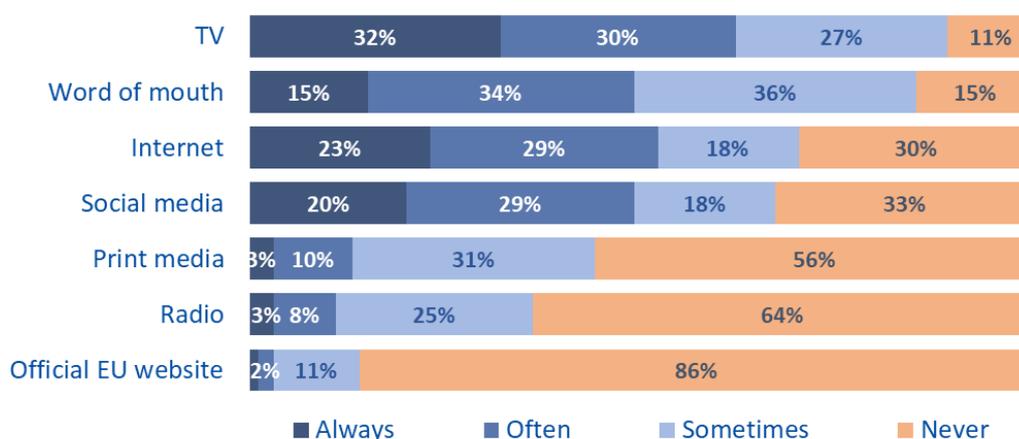
Most EaP citizens have seen or heard information about the EU in the last three months (53%) and ‘passive’ exposure continues to be particularly common in Moldova (69%), Ukraine (58%) and Belarus (54%), whereas only around 40% of Georgians and Armenians and around 30% of Azerbaijani were recently reached by EU-related information. Levels of ‘active’ exposure across the EaP region are slowly increasing across waves and half of citizens look for or access information on the EU – 16% ‘frequently’ or ‘very frequently’ and 34% ‘sporadically’ (versus 29% and 9% respectively in 2016). EU-related information is increasingly targeted through new media, such as Internet (61% of ‘active searchers’, up 8%) and social media (40%, up 11%). Moldovans are again the most ‘active’ (68%) of all EaP countries; while only 28% of Belarusians access/search for information on the EU. The representation of the EU in national media is overall positive (47%) as is the ‘quality’ of information – 54% of citizens say that it helps them ‘very much’ or ‘fairly’ to have a better understanding of the EU. Nearly half of EaP citizens who search for information about the EU use Russian (49%) or their national language (47%) – only 3% do so in English. In addition to ‘general information about the EU’ (40% of EaP citizens who look for EU-related information), the most searched topics are ‘the EU relations with [their] home country’, ‘social and political news’, ‘lifestyle in the EU’, ‘economic news’, ‘opportunities offered by the EU’ and ‘education and cultural programmes’.

3.3.1. Media usage as sources of information

‘Television’ and ‘word of mouth’ continue to be the most popular source of information in EaP countries: only 11% and 15% of the population respectively ‘never’ rely on them. EaP citizens are also increasingly turning to the Internet and social media regularly: around half of them ‘always’ or ‘often’ use them versus around 10% who use ‘print press’ and/or the radio. As for the official EU website, only 14% of residents of the EaP countries use it ‘always’ (1%), ‘often’ (2%) or sometimes (11%) – it was 17% in 2019.

At country level, around three quarters of Azerbaijanis, Armenians and Georgians are frequent users of the television. In Armenia, new media are also very common: 67% of citizens ‘always’ or ‘often’ use the Internet and 62% social media. Moldovans tend to be frequent users of many different media, including less common sources such as the radio (21%), print media (16%) and the official EU website (9%), these are the highest figures of all EaP countries. In Belarus, citizens are nearly equally reliant on the television (57%), ‘word of mouth’ (56%) and the Internet (50%), with all other sources – except social media (38%) rarely mentioned²⁵.

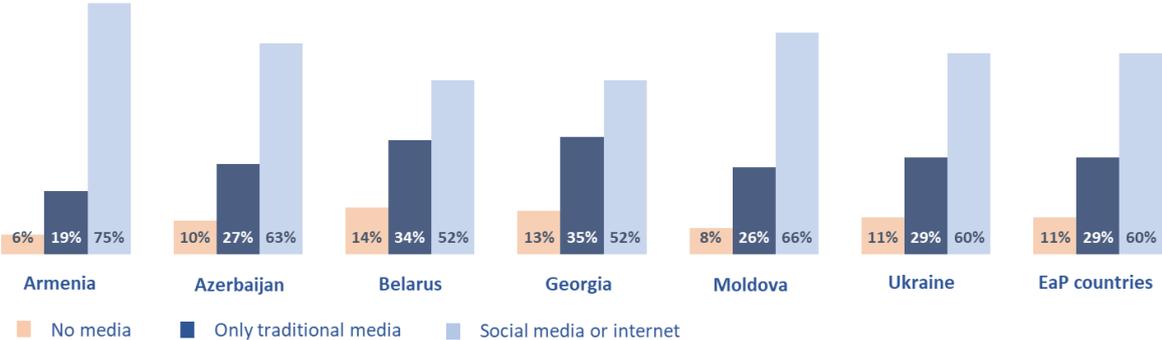
FIGURE 19 – Type of media used as a source of information (Q3.7)



²⁵ More details about country data are provided in Annex, Table A5.

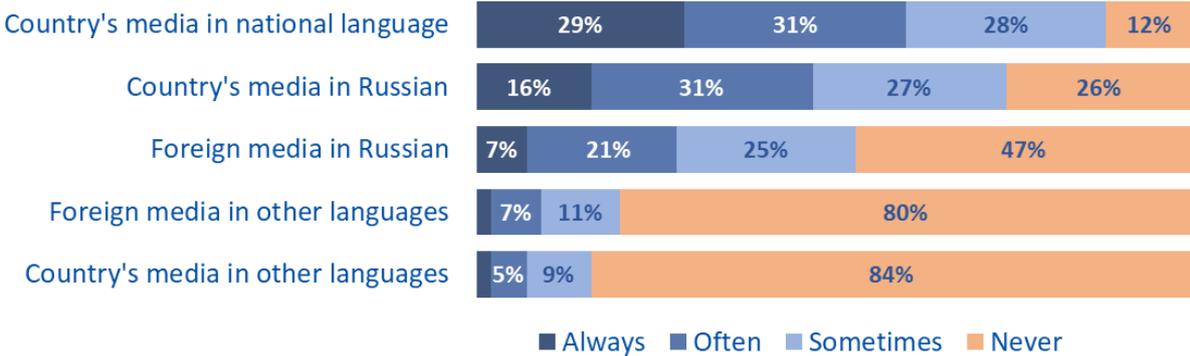
The breakdown of frequent users of traditional media only, new media and no media is shown in Figure 20²⁶. If only very frequent usage is considered, it becomes clear how new media (60%) has surpassed traditional media (29%), even if these include TV, in all countries. The gap between the usage of new media and traditional media only is particularly wide in Armenia (56%) – followed by Moldova (40%), Azerbaijan (36%) and Ukraine (31%) – and much more contained in Belarus (18%) and Georgia (17%). Overall, around one tenth of EaP citizens do not frequently use any of the above-mentioned media, ranging from 6% in Armenia to 14% in Belarus.

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



Due to varying degrees of media space restriction and polarisation, the **vast majority of people in the EaP countries continue to rely on their country’s media, either in the national language** (only 12% ‘never’ rely on them) **or Russian** (26%)²⁷. Foreign media in Russian are also used by 53% of EaP citizens (up 6% since 2019), and particularly in those countries where Russian TV channels are more freely available, such as Moldova (66%), Belarus (65%) and Armenia (56%)²⁸. Media in other languages, be it the country’s media or foreign media, are ‘never used’ by around 80% of EaP citizens – with only less than 10% using them ‘always’ or ‘often’.

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



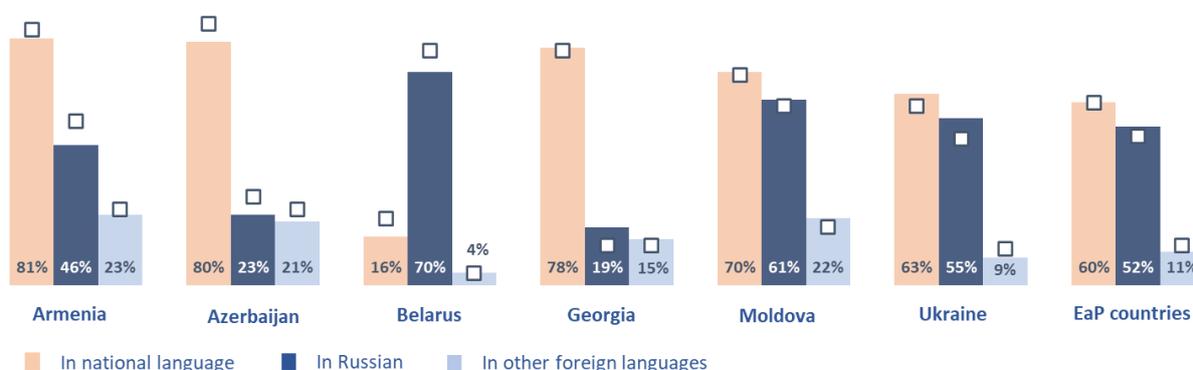
²⁶ The first group includes all individuals who ‘always or often’ use only traditional media (such as television, radio and print media); the second group includes all individuals who ‘always’ or ‘often’ use either the Internet (including the official EU websites) or social media; while the last group includes all individuals who do not ‘always’ or ‘often’ use any of the surveyed media.
²⁷ According to World Press Freedom Index by Reporters Without Borders, the Eastern Europe and Central Asia region – which includes the EaP countries - maintains its ranking at second from the bottom in the World Press Freedom Index. While the situation is stable or improving in Georgia (60th place over 180 countries) and Armenia (61th), where the government loosened its grip after the Velvet revolution, the 2019 elections in Ukraine (96th) and Moldova (91th) have sharpened the polarization and hurt the media climate. The situation remains critical in Belarus (153th) and Azerbaijan (166th), where the government keeps on increasing its control over news and information. See: <https://rsf.org/en/ranking#>
²⁸ See Figure 22.

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 languages²⁹.

Compared to 2019, the gap between ‘frequent usage’ of media in the national language (60%) and ‘frequent usage’ of media in Russian has slightly decreased (52%, it was 49% in 2019), possibly due to the increase in the usage of new media, which may include Russian news websites. Around one in ten EaP citizens also frequently rely on media in another foreign language – which mainly indicates English.

As previously noted, ‘frequent usage’ of media in Russian is more common in those countries where Russian is widely spoken by the population and/or TV channels are more freely available, such as Belarus (70%), Moldova (61%), Ukraine (55%) and Armenia (46%)³⁰. Azerbaijanis and Georgians are less ‘frequent users’ of media in Russian (23% and 19% of citizens respectively), with around 80% of the population frequently relying on media in their national language. Media in other foreign languages are most popular in Armenia (23%), Moldova (22%) and Azerbaijan (21%) where, in addition to English, few citizens also access media in Turkish.

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



As in 2019, ‘word of mouth’ appears to be the most trusted source of information (62%) – particularly in Belarus (74%) and Ukraine (70%) as opposed to Azerbaijanis (29%) and Moldovans (35%) who display the lowest levels of trust towards this source of information. **Countries’ media in the national language are the second front runner (58%)** – with the highest levels of trust declared by Armenians (70%) – followed closely by Internet (53%) and the television (51%). Social media is trusted by 45% of EaP citizens (up 5% since 2019); whereas other traditional sources of information – such as print media and the radio collect lower levels of trust each year (30% and 24%, down 3% and 4% respectively). Trust in the official EU websites is basically stable (27% of EaP residents) – peaking in Ukraine at 32%. Few EaP citizens trust media whose ownership is foreign: 33% media in Russian and 20% in other foreign languages (20%), with higher figures again in Armenia (40% and 26%). It is worth noting that trust is strongly related to usage and citizens struggle when it comes to rating media they do not commonly rely upon³¹.

²⁹ 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.

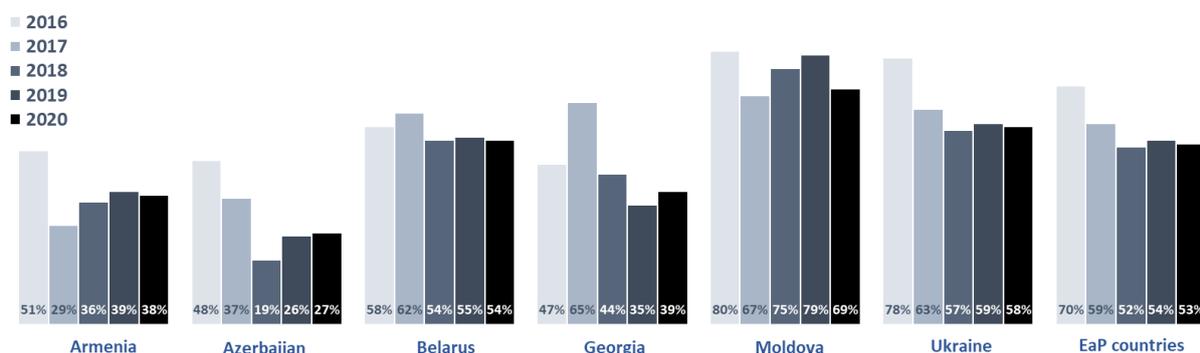
³⁰ The role of Russian TV channels in Armenia, Belarus and Moldova is significant, as these are freely available through terrestrial transmitters and the so-called ‘hybrid channels’, or through different local broadcasters and cable television services. To various extents, these are among the most popular 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, with the result that most citizens rely on national media in Russian rather than Russian media themselves. See: Monitoring of Russian channels by MEMO 98, Final report, 2015. http://www.media-diversity.org/additional-files/documents/Monitoring_report_Russian_TV.pdf

³¹ More details about country data are provided in Annex, Table A6.

3.3.2. Sources of information about the EU

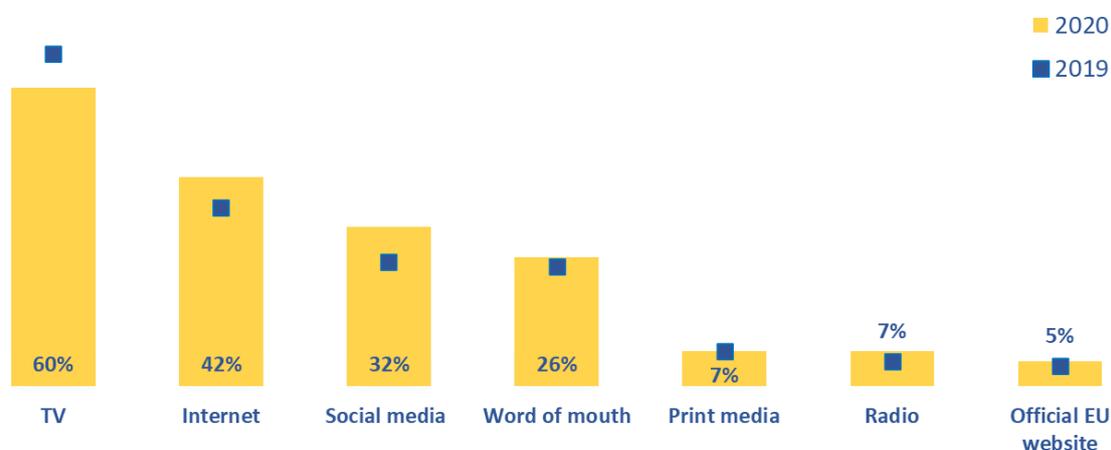
Around half of the EaP citizens (53%) state that they have seen or heard some information about the EU in the three months before the survey took place. This finding, which is in line with last year, is very distant from the 70% peak recorded during the 2016 wave and that can be linked to the entry in force of the DCFTA agreements in Moldova and Ukraine (*the effects on Georgia are evident in the 2017 wave*). It is also worth noting that the exposure of foreign news may be affected by the ‘polarisation’ of media sources and their focus on national issues, also considering that between 2018 and 2020 parliamentary and/or presidential elections have taken place in all EaP countries. At country level, passive exposure continues to be quite common in Moldova (69%) and, to a lesser extent, in Ukraine (58%) and Belarus (54%), whereas only around 40% of Georgians and Armenians and around 30% of Azerbaijani were reached by EU-related information, with no relevant change compared to 2019.

FIGURE 23 – 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)



Television continues to be the main source of EU-related information, although slightly less each year (60% EaP citizens who have seen/heard information about the EU did it through this media, down 7%). By contrast, passive exposure through new media is increasing: 42% of ‘passively exposed’ EaP citizens were reached through the Internet (up 6%) and 32% through social media (up 7%). Exposure through other sources has kept mainly stable at 26% for ‘word of mouth’, 7% for print media and the radio, and 5% for the official website.

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)



Television continues to be the main source of EU-related information in all countries and particularly in Georgia and Azerbaijan (respectively 77% and 73% of citizens who have seen/heard information about

the EU did so through this media). The Internet is a relevant source of passive exposure in Moldova (57%, with a gap of only 3 percentage points with the TV). New media are key in Ukraine too: 40% of citizens who were exposed to EU-related information mentioned the Internet and 38% social media. Around 30% of Moldovans and Ukrainians heard information about the EU through ‘word of mouth’ and around 10% through traditional media – which is higher than other EaP countries. Exposure through the official EU websites stands at 5% – with Moldovans, Ukrainians and Georgians as front runners.

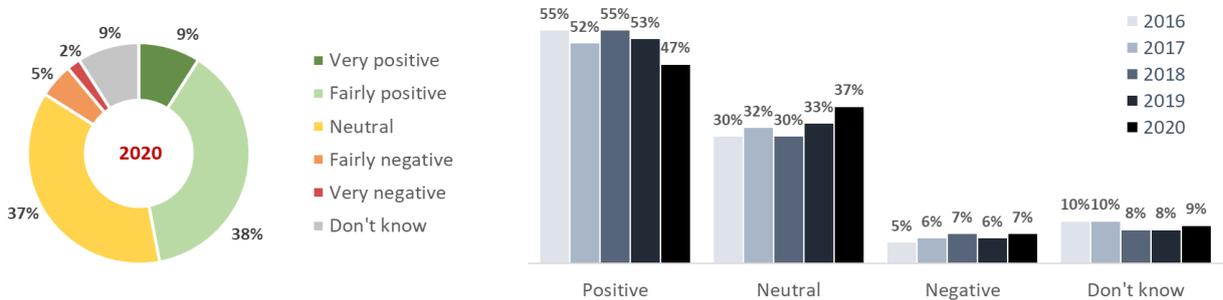
TABLE 6 – Source of information for those who have heard or seen information about the EU

	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	65%	33%	25%	10%	4%	1%	1%
Azerbaijan	73%	40%	22%	9%	3%	1%	1%
Belarus	68%	48%	17%	23%	7%	5%	3%
Georgia	77%	35%	15%	13%	3%	0%	5%
Moldova	60%	57%	25%	27%	9%	9%	4%
Ukraine	55%	40%	38%	30%	8%	8%	6%
EaP Countries	60%	42%	32%	26%	7%	7%	5%

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

Among those who had heard about the EU, 47% of EaP citizens felt that national media presented the European Union positively (9% ‘very positively’, 38% ‘fairly positively’), slightly less than in 2019 (down 6%). Only less than one in ten citizens did not have an opinion regarding this issue (9%).

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)



The EU has the most positive representation on Georgian, Armenian and Moldovan media – according to around 60% of citizens. In Ukraine too, around half of citizens consider the EU representation in the national media as ‘positive’ (48%) and an additional 38% as ‘neutral’. In Belarus, the population is slightly keener to consider the EU as neutrally represented (43%) rather than positively (38%) on country media. In Azerbaijan, ‘positive’ opinions (38%), although low, outnumber ‘neutral’ opinions (32%) due to the fact that as much as 21% of citizens provided a ‘don’t know’ response.

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	58%	28%	5%	9%	100%
Azerbaijan	38%	32%	9%	21%	100%
Belarus	38%	43%	9%	10%	100%
Georgia	59%	29%	2%	10%	100%
Moldova	57%	34%	5%	4%	100%
Ukraine	48%	38%	6%	8%	100%
EaP Countries	47%	37%	7%	9%	100%

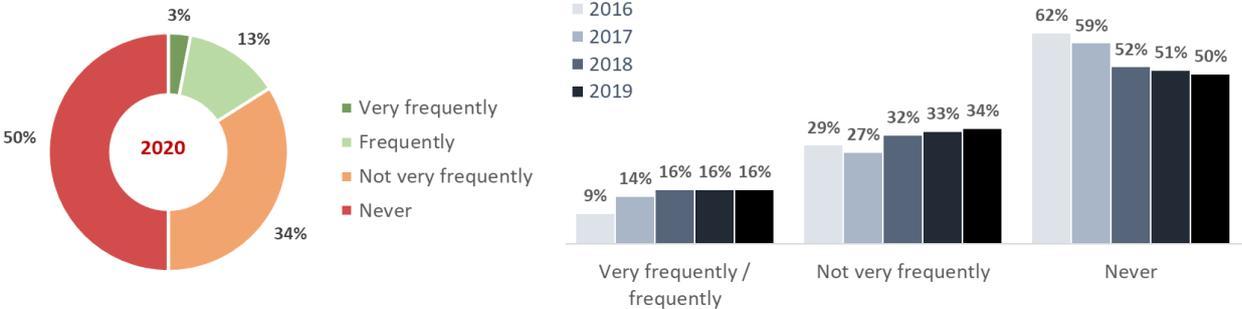
Percentages refer to citizens who have heard about the EU

According to 54% 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 EU. In fact, most residents in all countries except Belarus are satisfied with the quality of the EU-related information they can access. The most significant increase in figures was observed in Azerbaijan (59%, up 12%) who is now in line with Armenia (64%), Moldova (64%) and Ukraine (60%) and has surpassed Georgia (52%). On the contrary, around 70% of Belarusians are critical and claim that the information they access online does not help them ‘very much’ (38%) or ‘at all’ (29%) 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.

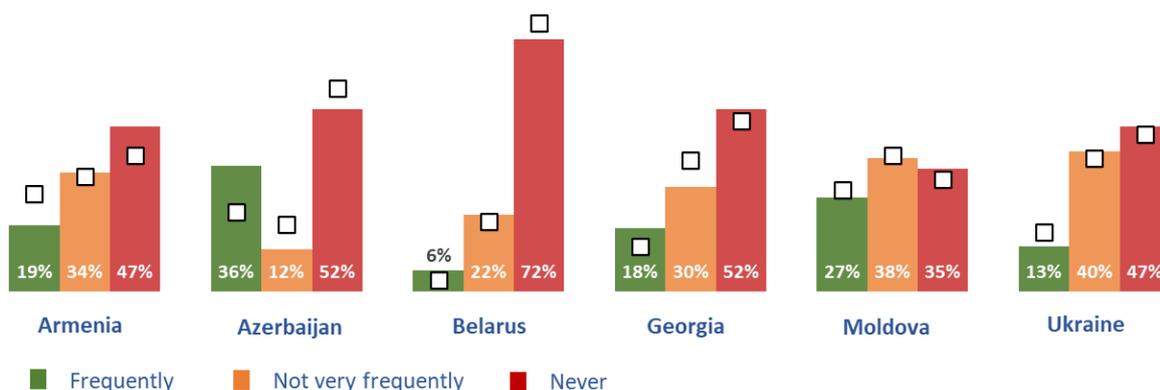
Levels of ‘active’ exposure across the EaP region are slowly increasing across waves and half of citizens look for or access information on the EU – 16% ‘frequently’ or ‘very frequently’ and 34% ‘sporadically’ versus 29% and 9% respectively in 2016.

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 2019, Moldovans are the most likely to access information on the EU (65%, of which 27% frequently) – possibly due to the high figures of passive exposure (69%). Levels of ‘active’ exposure have increased in Azerbaijan (48%, up 6%), mainly kept stable in Ukraine (53%) and Georgia (48%) and dropped in Armenia, where 47% of citizens never looked for/accessed any information on the EU (versus 39% last year). Still most of the Armenians looked for EU-related information either ‘frequently’ or ‘sporadically’. Only in Belarus, less than 30% of citizens ‘frequently’ (6%) or ‘not very frequently’ (22%) access/search for information on the EU, with no relevant changes compared to 2019.

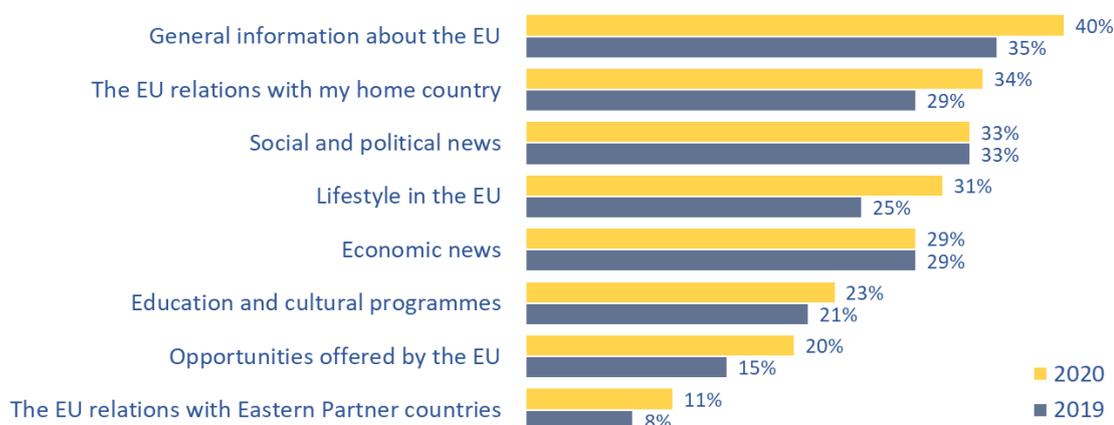
FIGURE 27 – How often do you look for/access information on the EU? (Q3.1) – Regional overview
(Percentages refer to citizens who have heard of the EU)



Nearly half of EaP citizens who search for information about the EU access it in Russian (49%) or in their national language (47%) – only 4% did so in English. The usage of Russian is particularly common among ‘active searchers’ in Belarus (95%) and Ukraine (57%). On the contrary, most Azerbaijanis (83%), Georgians (74%) Armenians (67%) and Moldovans (65%) access information in their national language – with only between 11% and 25% using Russian and/or less than 10% English.

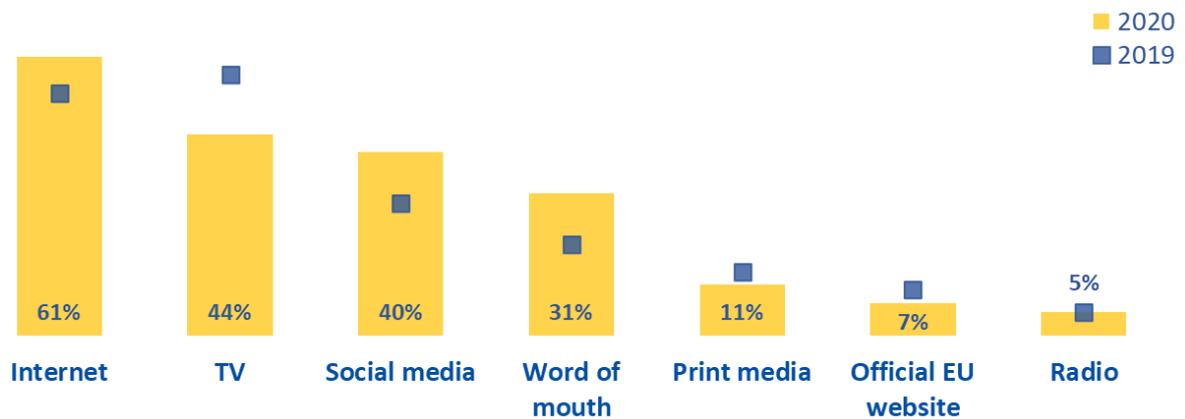
Around 40% of ‘active searchers’ looked for ‘general information about the EU’, around one third for ‘the EU relations with their home country’ (34%), ‘social and political news’ (33%), and ‘lifestyle in the EU’ (31%). Between 20% and 30% also searched for ‘economic news’ (29%), ‘educational and cultural programmes’ (23%) and ‘opportunities offered by the EU’ (20%), while only 11% of ‘active’ EaP citizens are interested in ‘the EU’s relations with other EaP countries’. At country level, Moldovans display a strong and heterogeneous interests, with between 28% and 43% of ‘active searchers of information’ targeting all thematic areas except for ‘the EU’s relations with other EaP countries’ (8%). Georgians, Armenians and Azerbaijanis seem particularly interested in ‘education and cultural programmes’ (around 36%); while Ukrainians and Belarusians targeted more general information about the EU, including ‘the lifestyle’ (around 40%).

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)



EU-related information is increasingly targeted through new media – the Internet (61% of ‘active searchers’, up 8%) and social media (40%, up 11%) – or else circulating by ‘word of mouth’ (31%, up 11%). By contrast, ‘active exposure’ linked to TV usage has largely declined (40%, down 17%). Other traditional media are virtually ignored by ‘active searchers’: 11% relied on print press, 5% on the radio (5%) and 7% accessed the official EU websites.

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 **Internet is the main source of information for those who look for information about the EU in all countries**, with peaks of 83% in Belarus. Moldovan and Georgian ‘active searchers’ are also keen users of Internet (68% and 66% respectively), though still quite reliant on the TV (52% and 40% respectively). Ukrainians tend to rely both on new media (Internet, 58% and social media, 46%, the highest figure of all EaP countries) and ‘word of mouth’ (39%, again the highest figure of all EaP countries). ‘Word of mouth’ is commonly used also by Belarusian ‘active searchers’ of EU-related information (26%) who are the most likely to rely on print press (14%). Access to the official EU websites stands at around 7-8% in all countries except for Armenia and Azerbaijan where it does not exceed 2%. Virtually no one also relies on the radio – except the Moldovans (9%).

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

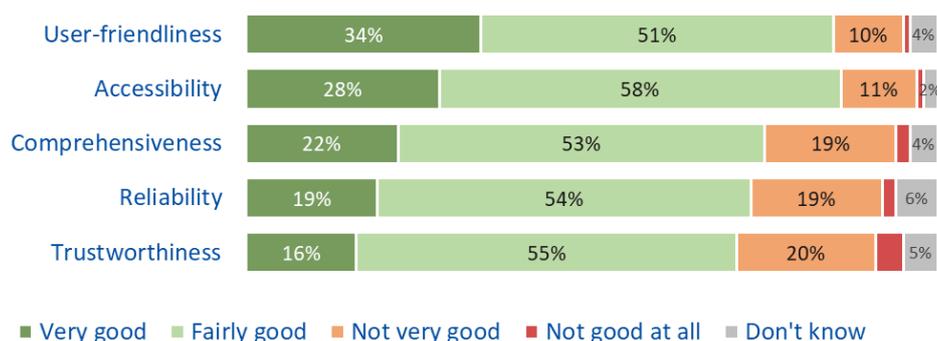
Q3.1.4 Where do you go to find information about the EU? <i>(Multiple answers possible)</i>							
	Internet	TV	Social media	Word of mouth	Print media	Official EU website	Radio
Armenia	59%	36%	33%	11%	4%	2%	3%
Azerbaijan	59%	47%	32%	15%	4%	2%	4%
Belarus	83%	31%	32%	26%	14%	8%	5%
Georgia	66%	40%	28%	7%	3%	8%	1%
Moldova	68%	52%	27%	20%	10%	7%	9%
Ukraine	58%	45%	46%	39%	13%	8%	6%
EaP Countries	61%	44%	40%	31%	11%	7%	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 2019. Positive opinions were observed with regard of all characteristics from over 70% of ‘active searchers’ – of which between 16% and 34% ‘very positive’ and between 51% and 58% ‘fairly positive’. The best ratings were observed with regard to user-friendliness (‘very’ – 34%; ‘fairly’ – 51%) and accessibility (‘very’ – 28%; ‘fairly’ – 58%). 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 (22%, up 4% since 2019), who have heard about the EU, have used EU informational websites³² at least once. The Facebook page of the EU is the most accessed (16% of EaP citizens), followed by the EU institution website (7%), the EU projects’ website (6%) and the EU Twitter pages (6%). Less than 5% of citizens accessed the EU Delegation and the ‘EU NEIGHBOURS’ websites.

Moldovans are the most active users of the EU websites (34%), with most of them accessing the EU Facebook page (31%, up 9% since 2019) and/or the EU institutions’ (13%) and the EU projects’ (12%) websites. This finding is consistent with the high levels of both ‘passive’ and ‘active’ exposure to EU-related information in the country. Access to informational websites is increasing also among Azerbaijani (15%, up 11%) and Belarusians (10%, up 2%), who remain the least likely to access EU websites.

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	6%	4%	3%	10%	12%	8%	7%
EU Delegation website	2%	2%	1%	4%	5%	4%	4%
EU projects’ websites	5%	3%	3%	10%	13%	6%	6%
‘EU NEIGHBOURS’ website	3%	2%	3%	5%	4%	3%	3%
EU Twitter	4%	5%	3%	5%	8%	8%	6%
EU Facebook	14%	12%	4%	21%	31%	19%	16%

Percentages refer to citizens who have heard about the EU

³² EU HQ institutions’ websites; EU Delegations websites; EU projects websites; ‘EU NEIGHBOURS’; EU Twitter; EU Facebook.

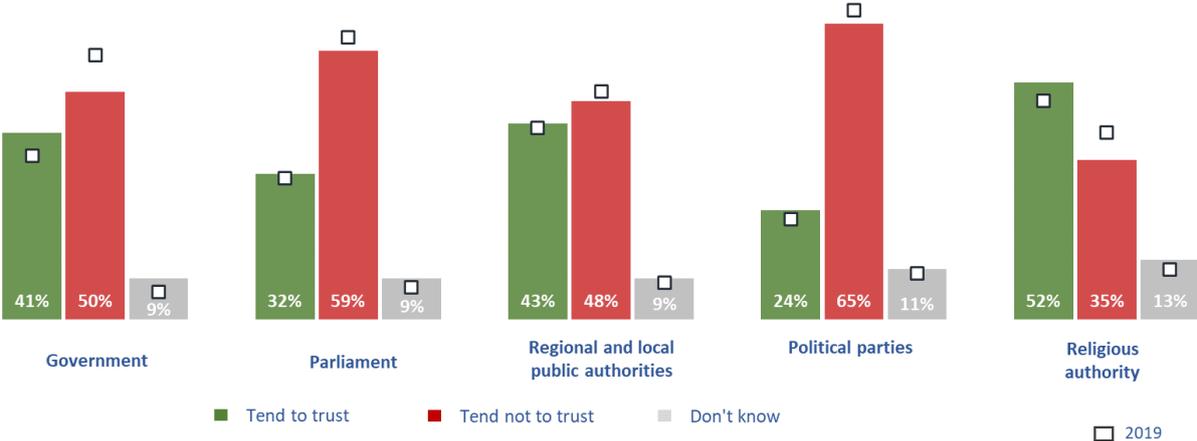
3.4. Views of residents of EaP countries on current situation and future expectations

Trust levels towards the different institutions and political parties in the EaP region remain quite low and the religious authority is the only authority trusted by the majority of citizens (52%). Regional and local public authorities are trusted by 43% of EaP citizens (but distrusted by 48%), followed by the Government (41% versus a 50% distrust rate) and the Parliament (32% versus 59%). Only 24% of citizens trust their political parties. Accordingly, only 33% of EaP citizens appear to be ‘satisfied’ with the way democracy works in their country. Dissatisfaction has increased in Belarus (56%, up 5%), as well as in Moldova (78%, up 2%), which remains the most dissatisfied of all EaP countries. The only elements that most EaP citizens feel applies to their country are ‘gender equality’ (60%) and ‘freedom of speech’ (54%), with no significant change since 2019. The issue of ‘corruption’ is still the most critical – 46% of EaP citizens (up 6%) say it ‘definitely’ does apply to their country, with peaks of 57% in Moldova. Most EaP citizens are not optimistic towards the future of their country (51%) and ‘low living standards and poverty’ (41%), ‘unemployment’ (38%) and ‘low salaries and pensions’ (35%) are their most pressing concerns.

3.4.1. View of country’s current situation

Trust levels towards the different institutions and political parties in the EaP region remain quite low and the religious authority continues to be the only authority trusted by the majority of citizens (52%). Regional and local public authorities are the second front runners, trusted by 43% of EaP citizens, but distrusted by 48%, followed by the Government (41% versus a 50% distrust rate) and the Parliament (32% versus 59%). Only 24% of EaP citizens trust their political parties.

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



The evolution of trust levels in EaP countries follows closely the outcome of recent political events, including elections. In Azerbaijan trust towards their political institutions and particularly the Parliament (57% down 13%) – although largely above the EaP average – has decreased significantly since 2019, possibly due to the February 2020 elections’ results which brought no significant political change contrary to expectations³³. In Belarus too, trust in public institutions and particularly the Parliament (41% down

³³ According to the Election Monitoring and Democracy Studies Center, the victory was secured failing to address recommendations of the Council of Europe’s Parliamentary Assembly on the improvement of the Election Code, in particular with regard to the composition of election commissions to allow for equal and fair representation of various political forces. ‘Violations [that had also] occurred in previous elections – one

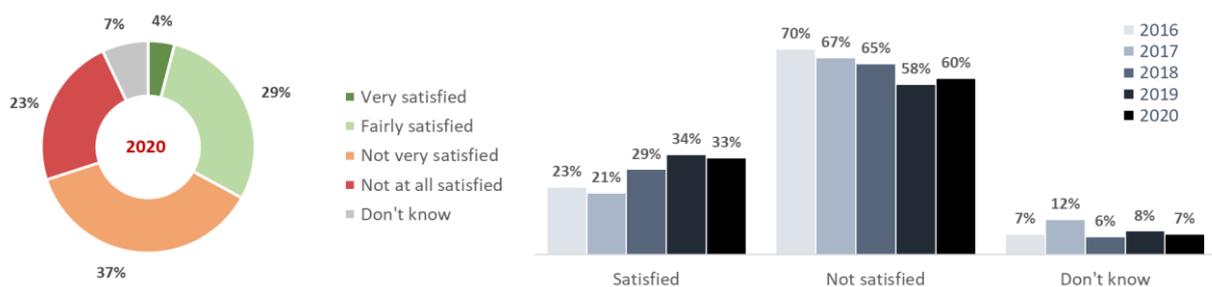
12%) and the political parties (26%, down 6%) also showed a drastic reduction since 2019 – when it was already at moderate levels – following the outcome of the 2019 Parliamentary polls, when the opposition failed to win a single seat. The effect of Moldova’s political turmoil – three governments succeeded each other during 2019 – is also reflected in current figures, with 25% of citizens who trust the Government, 18% the Parliament and 14% the political parties, even less than last year. Levels of trust in Georgia’s institutions and leaders are also not increasing, despite the fact that there is less than a year to elections, reflecting the stall in the revision of the electoral process and the parliamentary tensions of June 2019³⁴. By contrast, in Ukraine where trust levels are historically very low, citizens appear more positive after the outcome of 2019 elections and regional and local public institutions (41%, up 5%), the Government (30%, up 10%), the Parliament (23%, up 7%) and political parties (18%, up 5%) all collected a small increase in trust. In fact, Armenia is the only EaP country where the change in the political context following the ‘Velvet Revolution’ has triggered trust towards the main institutions of the country and, particularly, the Government (76%, up 4% since 2019 and up 48% since 2018).

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	76%	82%	46%	44%	25%	30%	41%
Parliament	59%	57%	41%	37%	18%	23%	32%
Regional and local public authorities	51%	61%	39%	45%	32%	41%	43%
Political parties	34%	48%	26%	26%	14%	18%	24%
Religious authority	50%	58%	33%	68%	69%	52%	52%

Accordingly, only 33% of EaP citizens appear to be ‘satisfied’ with the way how democracy works in their country, with no significant change compared to 2019.

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



Levels of satisfaction have kept mostly stable in Armenia (68%), Azerbaijan (49%), Georgia (22%) and Ukraine (31%). Dissatisfaction has increased in Belarus (56%, up 5%), as well as in Moldova (78%, up 2%) which continues to be the most dissatisfied of all EaP countries.

person voting multiple times, busing of voters, ballot-box stuffing, and voting without registration – were also recorded by observers. Source: <https://smdtaz.org/wp-content/uploads/2020/02/EMDS-100220.pdf>.

³⁴ According to a recent survey conducted by the National Democratic Institute (NDI) and CRRC-Georgia, most Georgians (59%) believe that the ruling party ‘Georgian Dream’ failed to ensure the legitimacy of the upcoming electoral process, switching to a fully proportional system. Around half of the population (45%) also holds the government responsible for the protests and violence that took place in June 2019 (Source: <https://www.ndi.org/publications/ndi-poll-declining-trust-country-s-democratic-institutions-georgians-negatively-assess>).

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

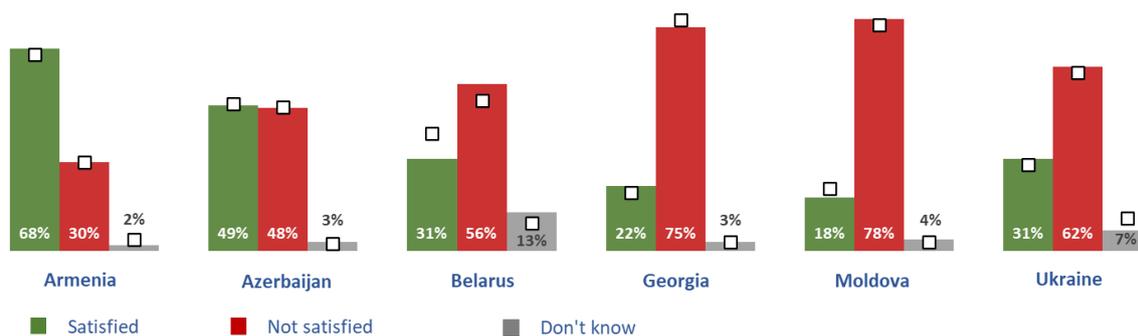
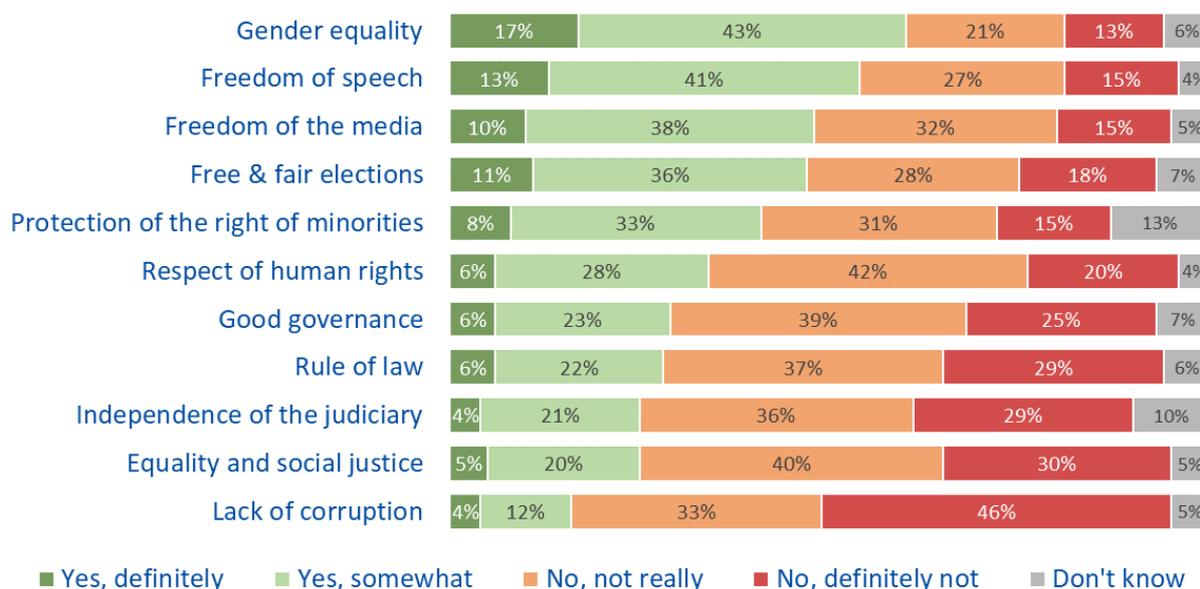


Figure 34 displays the ranking of the democratic elements that apply to their country according to EaP citizens – in this sense it provides a ‘true-to-life measure’ of the extent to which citizens believe that their countries have managed to establish sustainable democratic institutions and practices. The only elements that most EaP citizens feel applies to their country are ‘gender equality’ (60%, down 2% since 2019) and ‘freedom of speech’ (54%, up 4%), with no significant change since 2019. The hierarchy of the other elements that EaP citizens believe apply to their country is also largely consistent with last year’s findings and the issue of ‘corruption’ is still the most critical – 46% of EaP citizens (up 6%) say it ‘definitely’ does not apply to their country, with peaks of 57% in Moldova.

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



As in 2019, Armenians provided on average the most positive assessment about the prevalence of all democratic indicators in their country, which is impressive considering that 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. Azerbaijanis and Georgians also tend to provide more positive assessments than Moldovans, Ukrainians and particularly Belarusians, where citizens’ perceptions of the

democratic process are markedly decreasing. According to most Belarusians only ‘gender equality’ is present in their country (65% and down 5% since 2019). ‘Corruption’, lack of ‘independence of the judiciary’ and ‘poor governance’ are the most problematic areas in Moldova and Ukraine: between 7% and 20% 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 (65%) do not consider it an issue.

TABLE 12 – Elements of democratic indicators 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	Moldova	Ukraine	EaP Total
Freedom of speech	87%	52%	38%	56%	46%	56%	54%
Free & fair elections	78%	41%	33%	38%	35%	52%	47%
Gender equality	59%	61%	65%	51%	61%	58%	60%
Protection of the rights of minorities	73%	60%	42%	50%	46%	33%	41%
Independence of the judiciary	54%	51%	36%	30%	20%	16%	25%
Freedom of the media	85%	57%	32%	54%	40%	48%	48%
Respect of human rights	74%	56%	38%	45%	39%	25%	34%
Rule of law	70%	58%	42%	33%	27%	16%	28%
Good governance	75%	59%	34%	37%	17%	20%	29%
Lack of corruption	65%	35%	17%	33%	9%	7%	16%
Equality and social justice	61%	53%	25%	37%	26%	16%	25%

3.4.2. Future expectations

Most EaP citizens are not optimistic about the future of their country and this is in line with 2019 (51%). Optimism about their personal future is more common (60%) and slightly increasing across waves (it was 58% last year and in 2016 it was 51%).

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

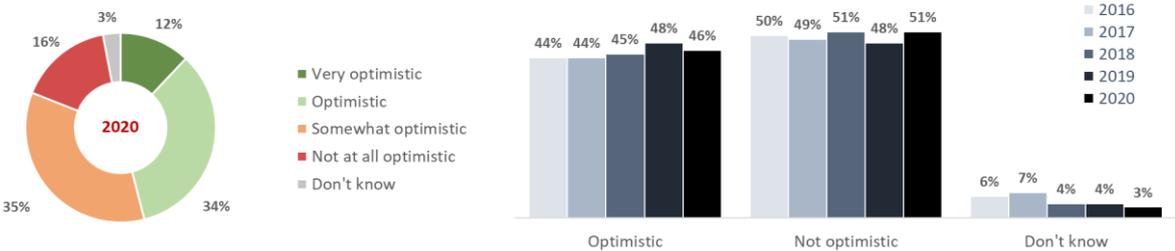
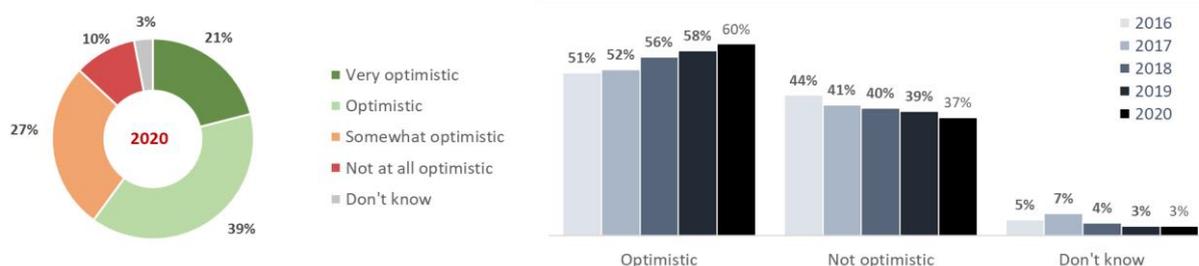


FIGURE 36 – How optimistic are you about your personal future? (Q4.6) – Regional overview



Compared to last year, expectations are mostly stable in Belarus, Georgia and Ukraine – where between 51% and 72% of citizens are optimistic towards their personal future and between 37% and 62% towards the future of their country. Moldovans (53% are pessimistic versus 49% in 2019) and, particularly, Azerbaijani (36% are pessimistic versus 23%) seem more concerned about the future of their country; while Armenians are the most optimistic about their own future (83%, up 6%), as well as their country's future (74%, up 4%), 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

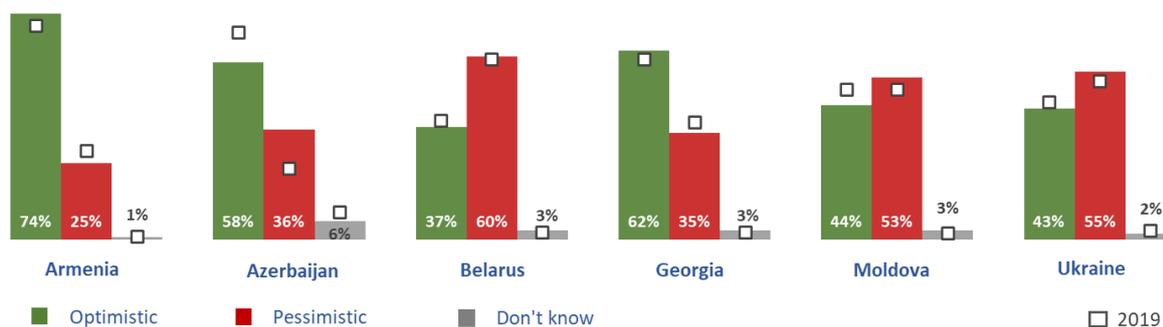
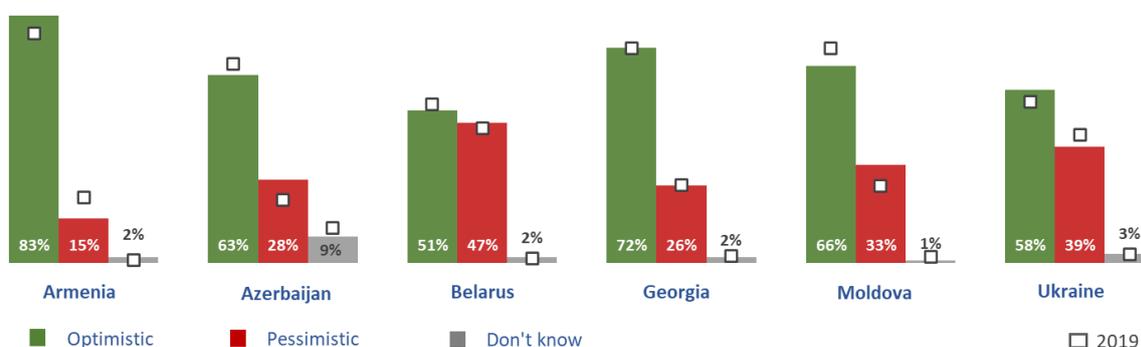


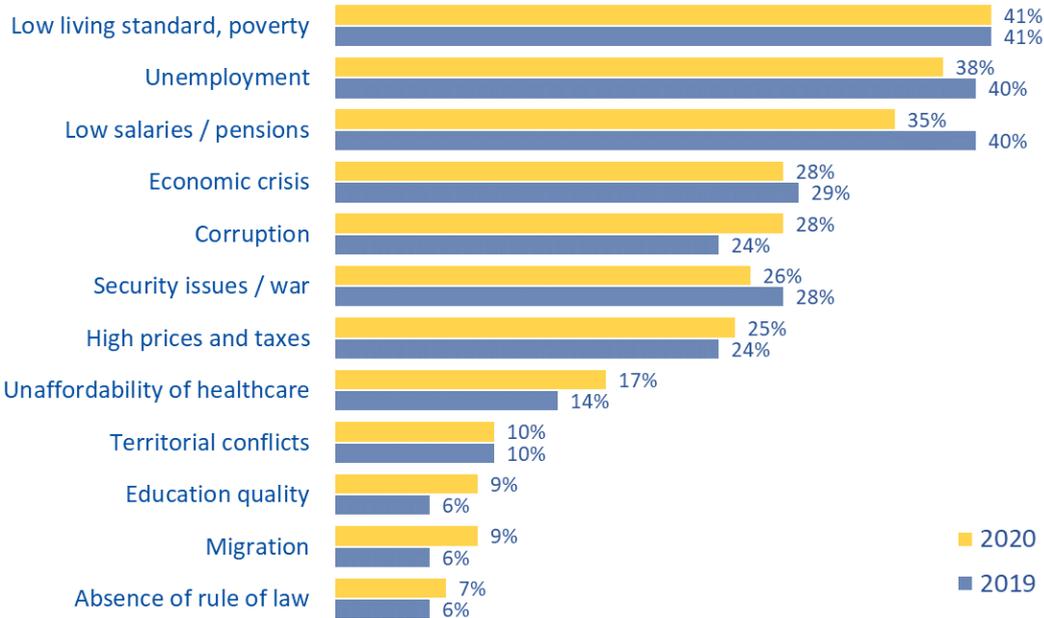
FIGURE 38 – How optimistic are you about your personal future? (Q4.6) – Country specific picture



‘Low living standards and poverty’, ‘unemployment’ and ‘low salaries and pensions’ appear to be the most pressing concern for the EaP population (41%, 38% and 35% respectively). 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, around one third of EaP citizens are still worried about ‘the economic crisis’ (28%).

A quarter of EaP citizens also mentioned ‘security issues and war’ (26%) – with peaks among Ukrainians (37%), Armenians (17%) and Azerbaijani (18%) – and 10% ‘territorial conflicts’ – with peaks among Azerbaijani (30%) and Georgians (19%). Despite the issue of the unresolved dispute over Transnistria, these issues are not a major concern for Moldovans and were mentioned respectively by 1% and 2% of citizens. Aside ‘low salaries and pensions’ (59%), Moldovans’ priority remains the widespread issue of ‘corruption’, which was mentioned by 41% of citizens together with ‘low living standards and poverty’³⁵.

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



³⁵ 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 (49%, down 3% since 2019). Compared to citizens with a neutral view of the EU (36%, up 2%), they tend to be slightly more concentrated among the younger age groups (40%), the most educated (41%) and native speakers of their national language (77%), whereas 'neutral' individuals are more likely to be middle-aged (38%), have a lower level of education (70%) and be native Russian speakers (31%). 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 61% have looked for/accessed information on the EU (versus 41% and 43% 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 who have a positive image of the EU and those who are neutral towards it³⁶.

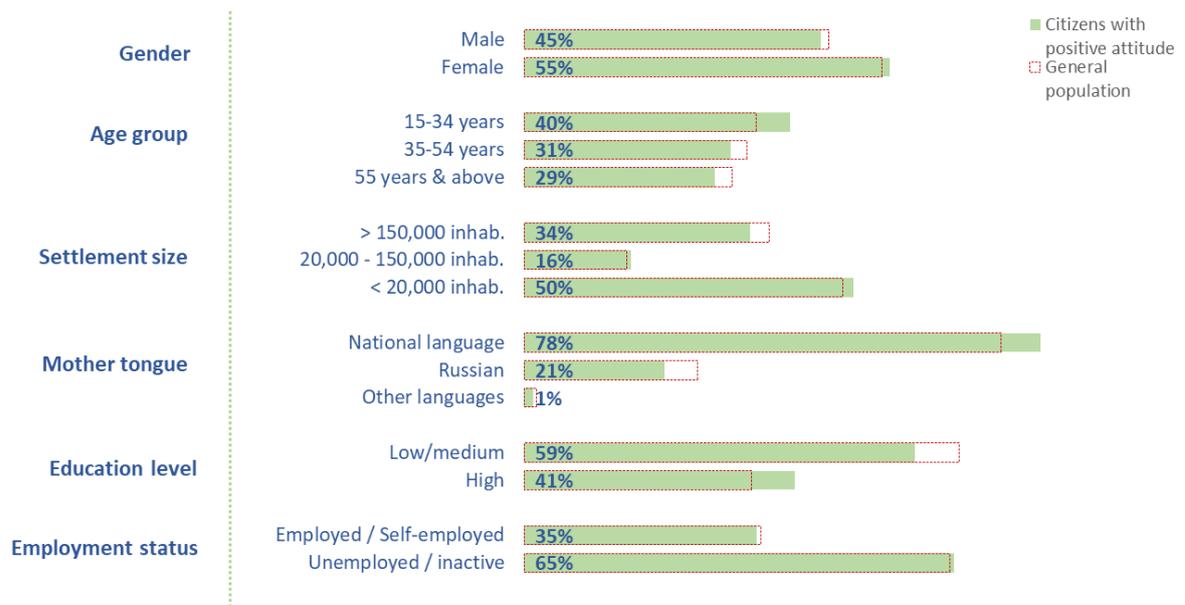
Attitudes were profiled against a comprehensive set of indicators, starting with the main socio-demographic characteristics, followed by passive and active exposure to EU-related information (including main language used and issues of interest), assessment of the relationship between their country and 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 (49%, down 3% since 2019). Compared to the general population of the EaP region, they tend to be slightly more concentrated among the younger age groups (40% are aged between 15 and 34 years versus 35% among EaP citizens overall) and the most educated (41% have a high level of education, versus 34%). They are also more likely to be native speakers of their national language (77% versus 72%) than the overall EaP population.

³⁶ Individuals that were mostly negatively oriented were excluded from the comparison, as their number was too small for the results to be statistically significant.

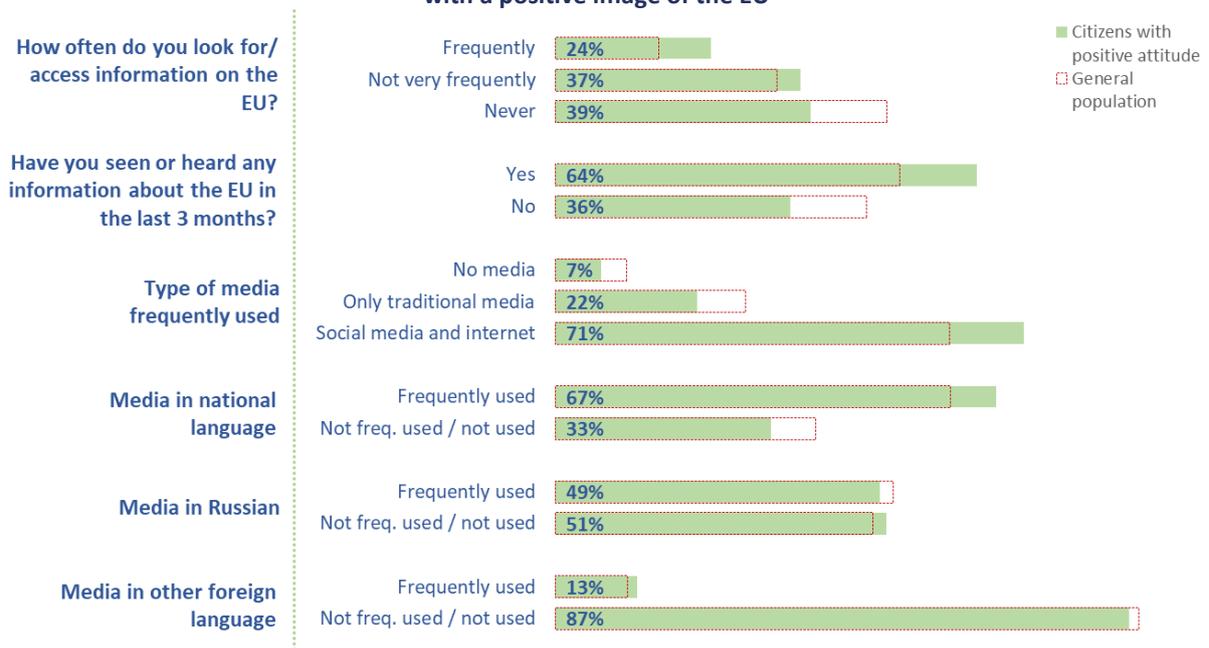
FIGURE 40 – Socio-demographic characteristics and country of EaP country residents with a positive image of the EU



Passive and active exposure to EU-related information is more common among EU supporters. Almost two thirds of them have seen or heard information about the EU (61%) and have actively looked for it (64%) – although only 25% of them ‘frequently’ (versus 53%, 50% and 16% for the general population).

EU supporters are less disposed towards the exclusive usage of traditional media (22% versus 29% in general population) and are stronger users of new media (71% versus 60%). They are also slightly more likely to use media in other foreign languages (13% versus 11%). If actively searching for EU-related information, 51% of EU supporters use their national language, 44% Russian and 5% English – the respective figures for the general population are 47%, 49% and 4%. They also appear to be slightly more interested in ‘the EU relations with [their] home country’ (37% versus 34%), ‘economic news’ (31% versus 29%) and ‘lifestyle in the EU’ (36% versus 31%) than the people with a neutral stance.

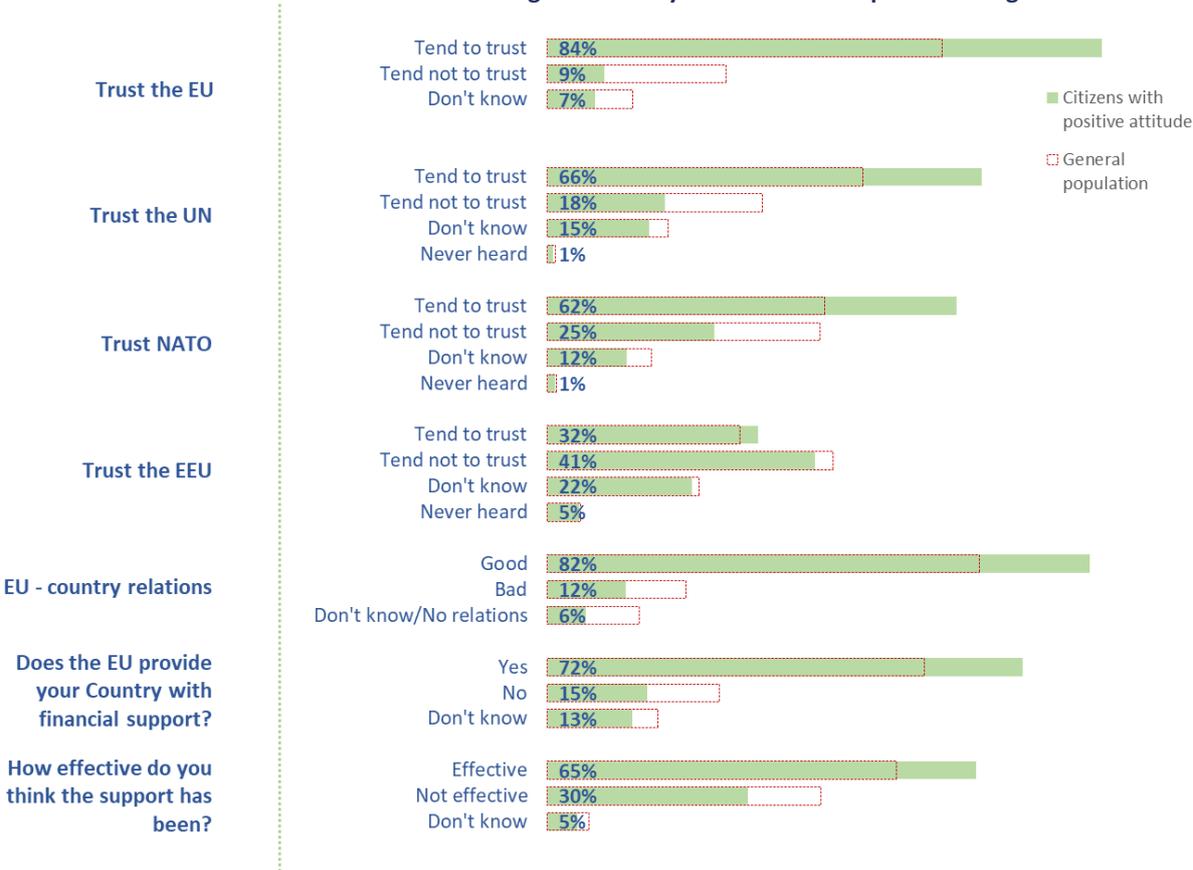
FIGURE 41 – Exposure to information about the EU and media usage among EaP country residents with a positive image of the EU



Over 80% of EU supporters have a positive image of the relations between the EU and their country (82%) and openly trust the EU (84%) – figures for the general population are much lower at 66% and 60% respectively. A positive attitude towards the EU goes together with a higher level of trust in the UN (66% versus 48%) and NATO (62% versus 42%).

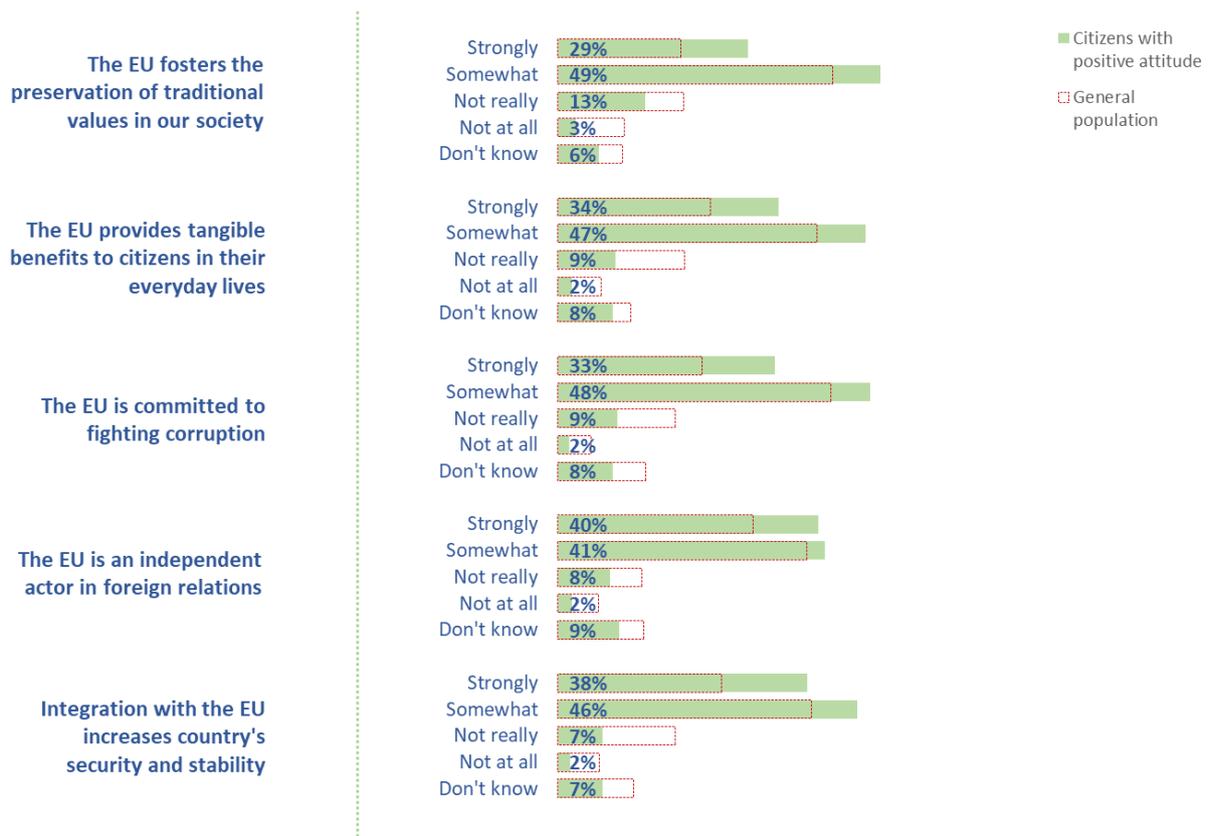
The overwhelming majority of pro-EU citizens acknowledge its financial support (72% versus 57% for the general population) and rate it as effective (65% versus 53%). All figures are consistent with 2019 findings and confirm how a greater ‘passive’ and ‘active’ exposure to EU-related information has a great impact on acknowledgement of the EU’s role.

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



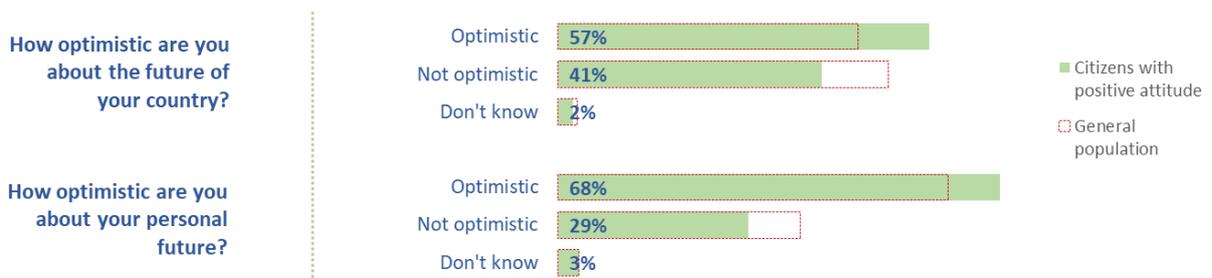
Over 80% of EU supporters ‘strongly’ or ‘somewhat’ agree with four (out of five) statements on common beliefs regarding the EU – reaching a peak of 84% when it comes to the rating of the effects of closer integration with the EU on country’s ‘security and stability’ – the respective figure for the overall population is 64%. 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 78% of EU supporters substantially agreed with it (versus 61% of people with a neutral view).

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 (68% portrayed themselves as ‘optimistic’ versus 60%) and their country’s future (57% versus 46%). EU supporters tend to share similar concerns as the general population, with the only exception of ‘security issues and war’ (29% versus 26%) about which the EU’s supporters seem to be slightly more worried. Conversely ‘low salaries and pensions’ (31% versus 35%) and the ‘unaffordability of the healthcare’ (14% versus 17%) are less of a concern for them although the difference with the general population is really small.

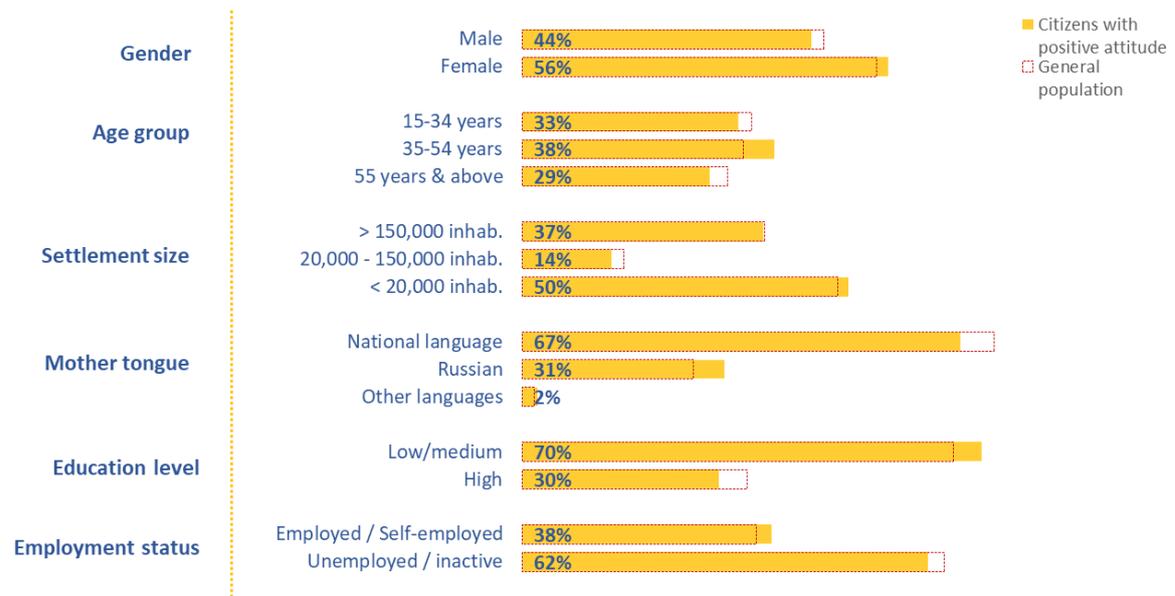
FIGURE 44 – View of the future among EaP country residents with a positive image of the EU



3.5.2. Neutral attitudes

EaP citizens with a neutral view of the EU account for roughly one third of the population (36%, up 2%). Compared to EU supporters, neutral citizens are more likely to be middle-aged (38% versus 31%), have a lower level of education (70% versus 59%) and be native Russian speakers (31% versus 21%).

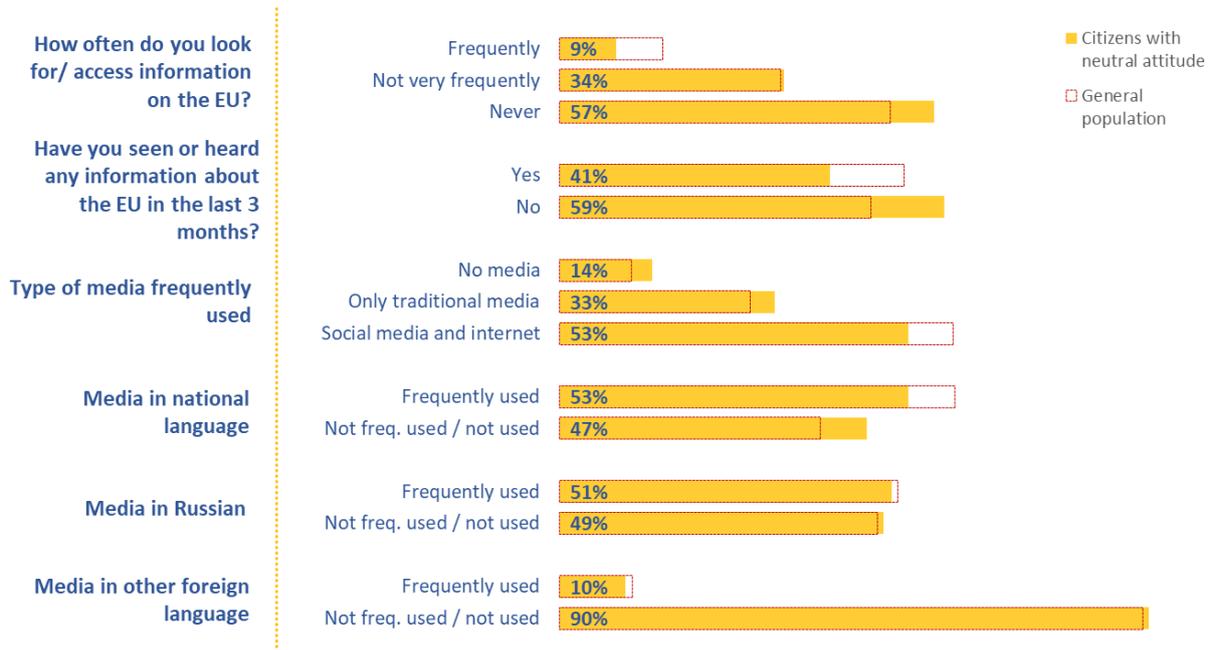
FIGURE 45 – Socio-economic characteristics and country of EaP country residents with a neutral image of the EU



Passive exposure to EU-related information among neutral citizens is low – 41% have seen or heard information about the EU in the three months before the survey (versus 64% of EU supporters) – **and their interest in EU-related matters is even more limited:** only 9% of ‘neutral’ citizens frequently searches for information on the EU and 34% does it ‘sporadically’ (versus 24% and 37% respectively). In fact, if actively searching, neutral citizens display lower levels of interest for all other EU-related matters than the EU supporters and only ‘general information’ was more searched by them (44% versus 37%).

Around half of neutral citizens are frequent users of new media (53% versus 71%); **around one third exclusive users of traditional media** (33% versus 22%), **and 14% do not frequently rely on any media at all** (versus 7%). If searching for EU-related information, **55% of neutrally oriented citizens use Russian, 43% their national language and only 2% English** – the respective figures for EU supporters are 44%, 51% and 4%.

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

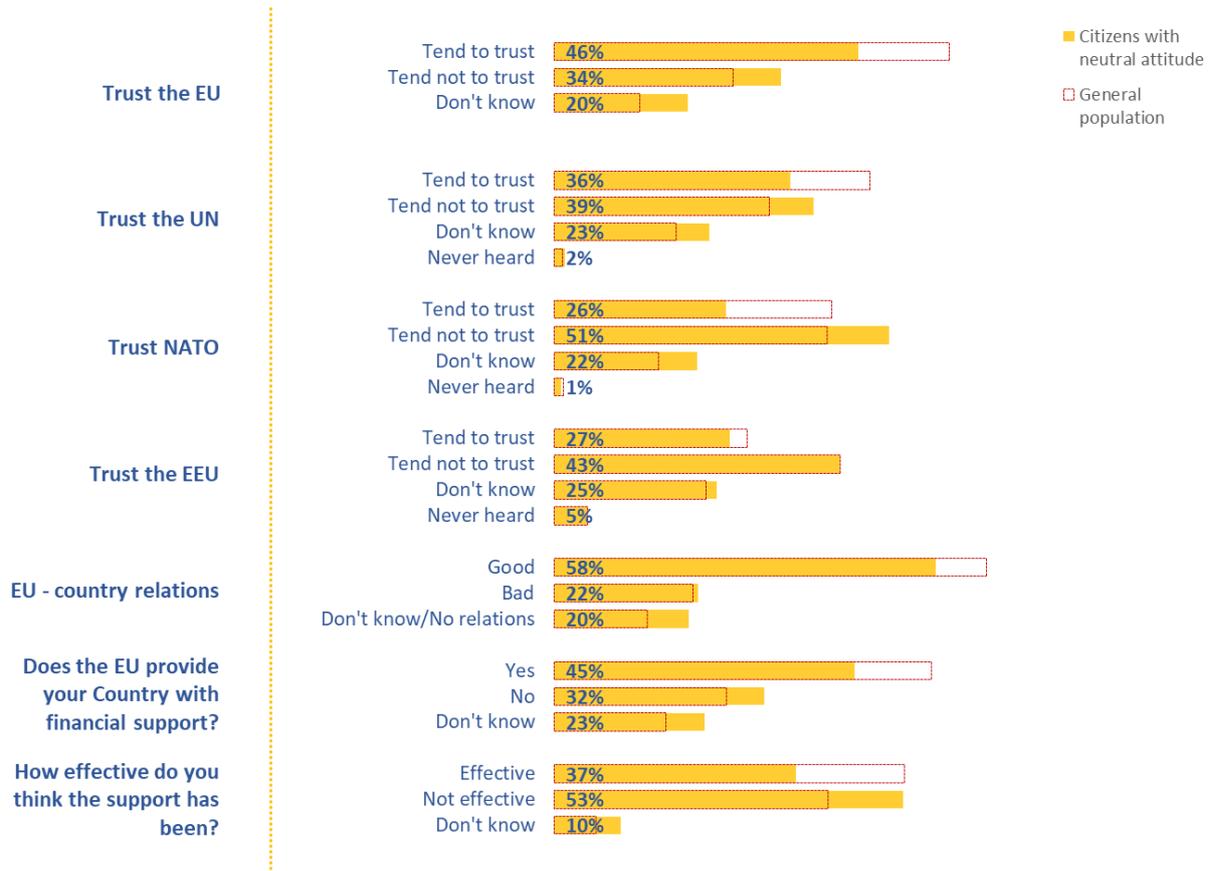


Neutral citizens tend to distrust all foreign institutions except the European Union, for which trust (46%) prevails over distrust (34%) although much less than in the case of EU supporters (84% versus 9% who distrust it). Around half of neutrally oriented EaP citizens distrust NATO (51% versus 25% of EU supporters); around 40% the UN (39% versus 18%) and the EAEU (43% versus 41%).

The assessment of the relations between EaP countries and the EU and the acknowledgement of the EU’s financial support is again less positive: only 58% of ‘neutral’ citizens would describe the relations between their country and the EU as ‘good’, 45% acknowledge EU’s financial support and 37% of them consider it as effective (versus 82%, 72% and 65% respectively for EU supporters).

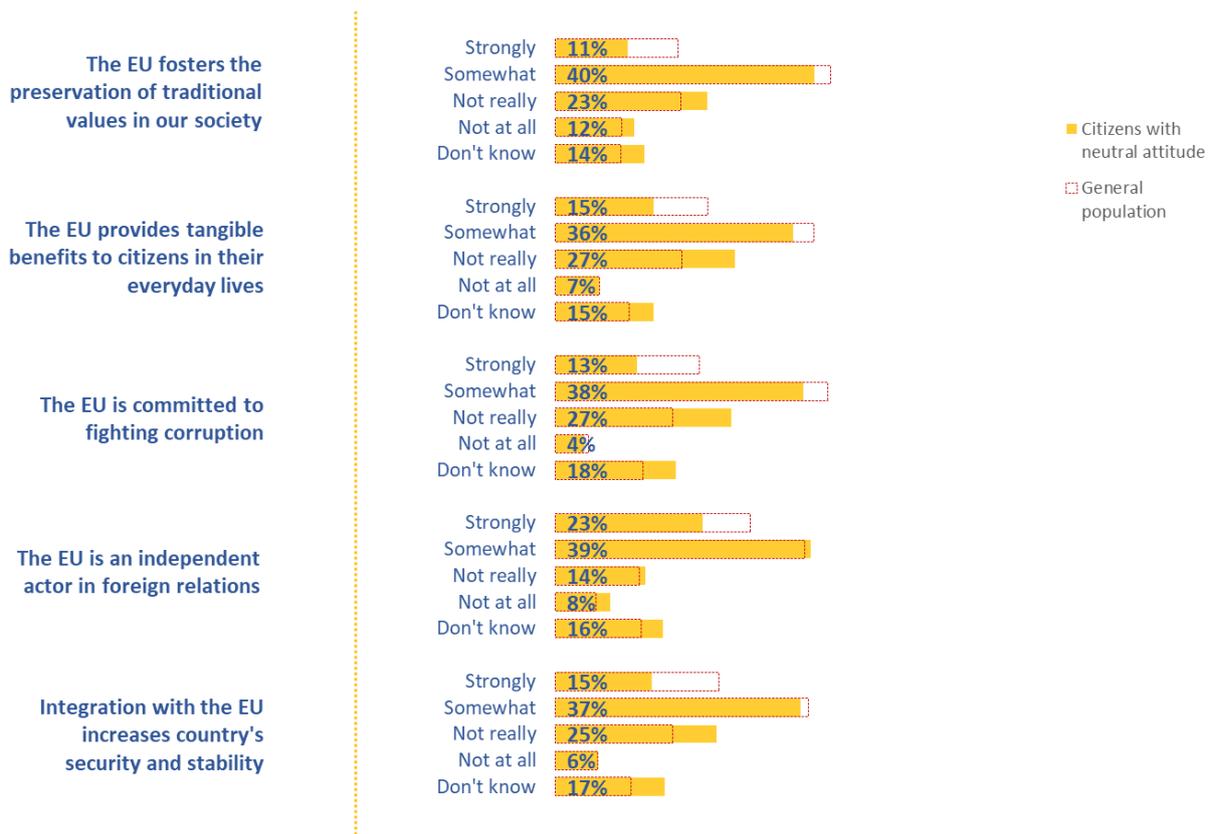
‘Neutral’ citizens also display lower awareness about the main foreign institutions: in fact, around one quarter could not rate its level of trust, nor evaluate the nature of relationship between the EU and their country and/or the extent of its financial support.

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



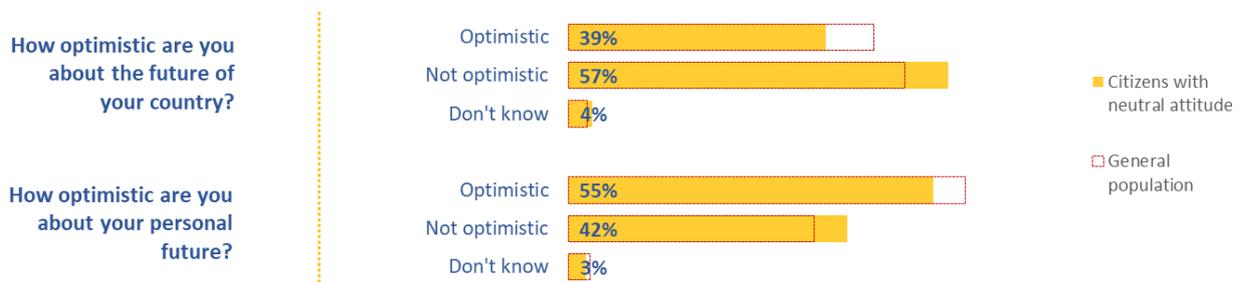
Most neutrally oriented individuals agree with all five statements on common beliefs although they tend to be far less positive than EU supporters – their level of agreement for all statements does not exceed 62% (84% for EU supporters). As in 2019, the highest share of approval was recorded for the statements that ‘the EU is an independent actor in foreign relations’ (62%); at the opposite end, only 51% of neutrally oriented citizens agreed with the statements: ‘the EU is committed to fighting corruption’, ‘the EU provides tangible benefits to citizens in their everyday live’ and ‘the EU fosters the preservation of traditional values in our society’. Again, ‘neutral’ citizens display a lower level of confidence in sharing their beliefs, with around 15% of them unable to provide a definite answer (the level of ‘don’t know’ responses is around 8% for EU supporters).

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 regarding the future of their country (57% are ‘not optimistic’, up 8% since 2019). In fact, they seem much more concerned than the EU’s supporters of the current economic situation and all related issues such as ‘unemployment’ (41%), ‘low salaries and pensions’ (38%), ‘high prices and taxes’ (27%) and ‘the unaffordability of the healthcare’ (21%).

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	28%	71%	59%	41%	43%	58%	55%
Health and medicine programmes	20%	53%	42%	37%	24%	42%	41%
Cultural programmes	15%	28%	33%	11%	18%	29%	26%
Economic reforms/business promotion	22%	11%	20%	21%	17%	29%	25%
Justice reforms/police reforms	3%	13%	0%	9%	20%	28%	21%
Infrastructure development projects	11%	15%	18%	23%	58%	17%	20%
Energy efficiency programme and global warming programme	6%	5%	16%	4%	12%	25%	20%
Agricultural and rural development programmes	23%	37%	8%	34%	20%	12%	16%

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	29%	8%	11%	36%	7%	17%	16%
	The same	23%	13%	31%	25%	28%	45%	36%
	Less	29%	22%	28%	15%	39%	26%	26%
	Don't know	19%	57%	30%	24%	26%	12%	22%
	Total	100%	100%	100%	100%	100%	100%	100%
United Nations or one of its agencies	More	26%	9%	12%	16%	5%	10%	11%
	The same	21%	14%	38%	23%	25%	41%	35%
	Less	23%	20%	21%	14%	32%	30%	26%
	Don't know	30%	57%	29%	47%	38%	19%	28%
	Total	100%	100%	100%	100%	100%	100%	100%
Russian Federation	More	41%	15%	52%	5%	11%	3%	13%
	The same	20%	12%	25%	4%	27%	9%	13%
	Less	24%	21%	8%	54%	47%	66%	50%
	Don't know	15%	52%	15%	37%	15%	22%	24%
	Total	100%	100%	100%	100%	100%	100%	100%
International Monetary Fund / World Bank	More	35%	17%	22%	27%	13%	31%	27%
	The same	23%	15%	34%	19%	31%	40%	34%
	Less	17%	14%	15%	10%	23%	17%	17%
	Don't know	25%	54%	29%	44%	33%	12%	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	60%	36%	26%	45%	34%	34%	35%
Greater economic development	62%	41%	28%	40%	32%	20%	27%
Access to more products and services	66%	49%	47%	56%	57%	65%	60%
More tourism	68%	69%	57%	76%	49%	63%	63%
Improved infrastructure	60%	42%	33%	64%	48%	30%	36%
Improved trade	60%	56%	52%	46%	45%	56%	55%
Better education	60%	52%	45%	55%	49%	35%	41%
Greater employment opportunities	49%	33%	43%	34%	42%	35%	37%
Improved agricultural production	54%	45%	26%	38%	35%	28%	32%
Less corruption	54%	23%	15%	28%	19%	13%	17%
Better law enforcement	54%	38%	23%	37%	26%	31%	32%
Improved quality of healthcare system	64%	40%	36%	53%	40%	27%	33%
Improved quality of the justice system	47%	37%	19%	55%	28%	20%	25%

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	15%	13%	14%	15%	10%	11%	12%
Promote economic development	39%	25%	49%	47%	40%	57%	50%
Promote access to more products and services	8%	6%	19%	3%	6%	7%	8%
Increase tourism	22%	34%	21%	14%	6%	9%	14%
Improved infrastructure	10%	9%	10%	6%	30%	15%	14%
Improved trade	13%	25%	33%	9%	13%	9%	15%
Promote better education	36%	46%	24%	36%	26%	15%	22%
Create greater employment opportunities	22%	35%	42%	42%	29%	34%	35%
Improve agricultural production	24%	13%	9%	27%	11%	26%	21%
Reduce corruption	25%	14%	14%	15%	45%	43%	34%
Promote better law enforcement	9%	6%	15%	8%	14%	13%	12%
Improve quality of healthcare system	43%	25%	36%	42%	43%	31%	33%
Improve quality of the justice system	16%	4%	4%	15%	19%	13%	11%

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

TABLE A5 – Media usage frequency

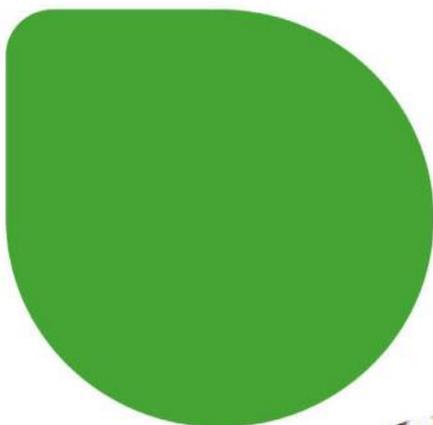
Q3.7. & Q3.8. How frequently would you say that you use the following? (Percentage of population who answered 'always' or 'often')							
	Armenia	Azerbaijan	Belarus	Georgia	Moldova	Ukraine	EaP Total
Television	76%	78%	57%	73%	66%	57%	62%
Word of mouth	58%	51%	56%	50%	43%	47%	49%
Internet	67%	59%	50%	43%	61%	50%	52%
Social media	62%	53%	38%	44%	48%	50%	49%
Print media	10%	5%	15%	8%	16%	13%	13%
Radio	16%	11%	12%	7%	21%	10%	11%
Official EU websites	6%	3%	2%	4%	9%	2%	3%
Country's media in national language	81%	80%	16%	78%	70%	63%	60%
Country's media in Russian	34%	20%	63%	11%	57%	51%	47%
Foreign media in Russian	35%	19%	38%	13%	40%	26%	28%
Foreign media in other languages	15%	17%	3%	12%	17%	7%	9%
Country's media in other languages	18%	13%	2%	6%	13%	6%	7%

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
Official EU website	24%	9%	24%	28%	21%	32%	27%
TV	68%	60%	52%	63%	49%	47%	51%
Radio	36%	18%	38%	16%	25%	22%	24%
Print media	30%	16%	44%	25%	26%	30%	30%
Social media	42%	35%	38%	42%	34%	51%	45%
Internet	53%	44%	49%	51%	49%	56%	53%
Word of mouth	51%	29%	74%	46%	35%	70%	62%
Country's media in national language	70%	66%	44%	66%	48%	60%	58%
Country's media in Russian	42%	25%	57%	18%	36%	43%	41%
Country's media in other languages	27%	21%	14%	17%	14%	19%	19%
Foreign media in Russian	40%	22%	42%	14%	29%	34%	33%
Foreign media in other languages	26%	18%	15%	18%	19%	21%	20%

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	26%	18%	41%	25%	41%	49%	41%
Unemployment	35%	67%	39%	65%	32%	30%	38%
Low salaries / pensions	17%	33%	63%	32%	59%	29%	35%
Corruption	15%	23%	22%	6%	41%	32%	28%
Economic crisis	23%	8%	36%	39%	21%	31%	28%
Security issues / war	17%	18%	4%	7%	1%	37%	26%
High prices and taxes	5%	17%	39%	24%	26%	24%	25%
Unaffordability of healthcare	16%	13%	19%	24%	17%	17%	17%
Territorial conflicts	8%	30%	3%	19%	2%	7%	10%
Education quality	24%	13%	10%	14%	13%	6%	9%
Migration	9%	1%	7%	13%	26%	9%	9%
Absence of rule of law	9%	12%	8%	8%	8%	5%	7%



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