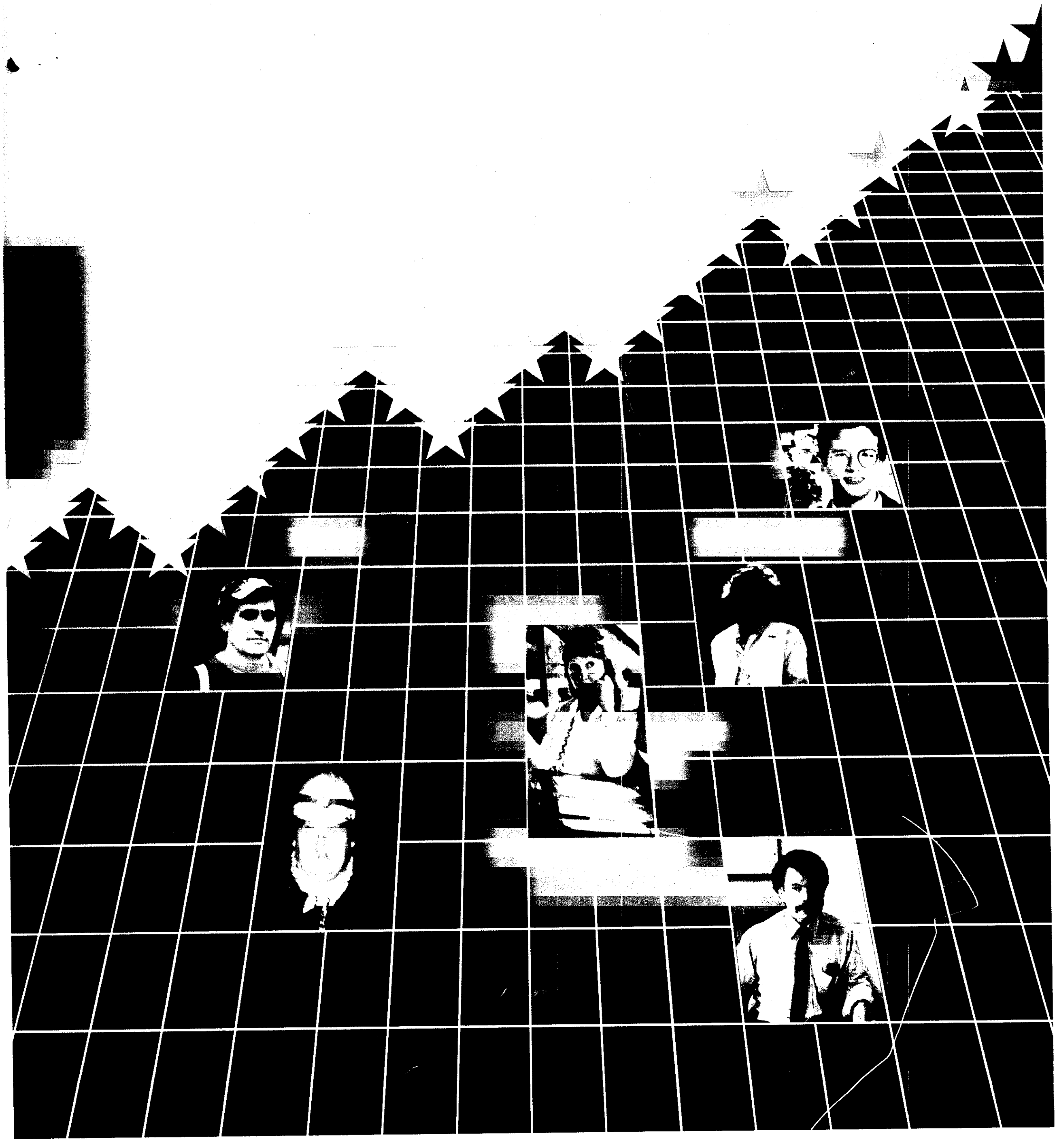
MARCH 1994 No. 4

CENTRAL AND EASTERN EUROBAROMETER

PUBLIC OPINION AND THE EUROPEAN UNION (16 COUNTRIES' SURVEY)



INCLUDES: SPECIAL POST-ELECTION RUSSIA SURVEY

EUROPEAN COMMISSION

HIGHLIGHTS

The European Commission's EUROBAROMETER surveyed 16,716 people in 16 Central and Eastern European countries during November 1993 to assess public support for the European Union, as well as for political and economic change. A supplementary survey was carried out in European Russia immediately after the 12th December Parliamentary elections to discover to what degree, if any, the results had affected the views of its citizens concerning the development of democracy and support for economic reform.

* Most Russians are just as pessimistic about their country's direction after their elections as one month before. Support for the market economy among Russians has diminished further, with two-to-one against, while six-to-one are now dissatisfied with their country's democracy. Even more extraordinary, exactly the same percentage of Russians fear the advent of a dictatorship within the year ahead (33%) as twelve months ago. It seems that elections and the plebiscite on the new constitution are perceived to have done little to advance the cause of democracy in Russia.

* Perceptions of the importance of the European Union and Russia grow in the region as a whole (excluding Russia herself), while a third less people feel the United States is primarily where their country's future lies. The European Union comes first in all countries where it has signed or is negotiating Europe Agreements, plus Albania. Russia's influence in Armenia grows very significantly (+43). In European Russia itself, the United States is best placed, slightly ahead of "other Commonwealth of Independent States countries", as it is in the Former Yugoslav Republic of Macedonia.

* A gradual erosion is taking place in the generally positive image of the European Union in many countries. The position in Visegrad countries in particular is however still more positive (37%) than neutral (34%) or negative (8%). Armenia registers the biggest leap in positive feelings towards the European Union (+16); Slovenia - the greatest fall (-15).

* The concept of a market economy is rejected by absolute majorities in all Euro-CIS countries surveyed. By contrast, nowhere is there a majority against it in PHARE recipient countries, with Latvians, Slovenes and Slovaks divided. However, economic hardship is taking its toll: Support for the market economy declines just as much in PHARE countries as the Euro-CIS (-6) compared to a year ago.

* Albania (whose economy grew) is the only country where most people say their household finances improved during the past year. For six out of ten in the region, household finances got worse in 1993, while only a sixth say they improved. Nevertheless, more people in both PHARE and Euro-CIS countries on average still want economic reforms and privatisation to be speeded up rather than go slower, even if support for the market economy itself is not so strong in some places.

* Levels of dissatisfaction with the development of democracy are two-to-one in PHARE countries overall and five-to-one in the Euro-CIS. Previously, only Lithuania had a majority satisfied - now most are dissatisfied everywhere except in the Czech Republic, whose people are divided. Human rights are also a hot topic. Primarily conceived in economic terms, even less people say they are respected than last year overall. Only in Visegrad countries (except Poland), Albania and Estonia (despite ethnic minority views) do majorities say there is respect.

INTRODUCING THE EUROBAROMETER

Standard EUROBAROMETER public opinion surveys have been conducted in the European Union (EU) every Spring and Autumn since 1973 on behalf of Directorate-General X for Information, Communication, Culture, Audiovisual of the European Commission. Around 12,800 persons of the 15+ age group are interviewed EU-wide face-to-face on a nationally-representative basis in all 12 Member States. Reports have been published on the results every June and December. A trends volume comes out every March. From 1994, monthly tracking of public opinion as well as polls of top decision-makers will commence within the European Union.

Central and Eastern EUROBAROMETER started in Autumn 1990 when nationally-representative surveys were undertaken for the European Commission in Bulgaria, Czechoslovakia, Hungary and Poland. For the second wave of research, the number of countries was expanded and included nationally-representative samples from Albania, Estonia, Latvia, Lithuania, Romania and Russia west of the Urals as well. Central and Eastern EUROBAROMETER No.3 further added Armenia, Belarus, Georgia, the Former Yugoslav Republic of Macedonia, Moldova, Slovenia and Ukraine, while taking into account the split of Czechoslovakia. Georgia and Moldova were not surveyed in 1993. In virtually all of the 16 countries covered by Central and Eastern EUROBAROMETER No. 4, around 1,000 persons of the 15+ age group were interviewed face-to-face in their homes.

Funding was not available from the European Commission for Central and Eastern EUROBAROMETER No. 4. We therefore wish to thank all participating Eastern European institutes for having undertaken a shorter survey, free of charge, for which Gallup UK undertook the data-processing for the project on their own initiative. In addition, a short series of questions was asked by ROMIR in European Russia immediately after the 12th December elections.

Although the same technical standards for surveys available in most of the European Union cannot necessarily be expected to be found in Central and Eastern Europe at the present time, the results, cautiously read, do allow us a unique insight into the attitudes of the citizens of Central and Eastern Europe as they face revolutionary times.

In accordance with the normal practice for this type of survey, the European Commission disclaims all responsibility for questions, results and commentaries. This report, drawn up by the "Surveys, Research, Analyses" Unit of Directorate-General X for Information, Communication, Culture, Audiovisual is an internal document of the European Commission.

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CONTENTS

MAJOR NEWS ITEMS AROUND TIME OF MAIN FIELDWORK: 1ST NOVEMBER - 5TH DECEMBER 1993

September-early November	Civil war engulfs Georgia.
30th October	Czech Republic elected to UN Security Council.
31st October	60 Estonian, Latvian and Lithuanian Parliamentarians endorse creation of a future Baltic Council.
2nd November	Hungarian Parliament ratifies friendship and cooperation treaties with Croatia and Slovenia, securing minority rights in all three countries.
4th November	Romania becomes Council of Europe's 32nd member.
10th November	Polish Sejm confirms new left-wing government.
	Several ethnic Albanians arrested on allegations of preparing armed rebellion in the Former Yugoslav Republic of Macedonia.
	New coalition government formed in Slovakia.
15th November	Albanian-Greek governments discuss their differences in Tirana.
18th November	The Ukrainian Parliament "conditionally" ratifies the START-1 Treaty.
	Belarusian Parliament ratifies CIS economic union and agrees monetary union with Russia.
	40,000 trade unionists demonstrate in Bucharest.
22nd November	Armenia introduces its own currency, the "dram".
25th November	First reading of new draft law on citizenship by the Latvian Parliament.
26th November	Bulgaria reaches agreement on debt reduction with London club creditors.
6th December	European Council adopts Europe Agreements with Poland and Hungary and Interim Agreement with Bulgaria.
12th December	Parliamentary elections held in Russia.

1. ECONOMIC AND DEMOCRATIC REFORMS

1.1 Overall situation

Winter came early to Europe this year. By mid-November 1993, the temperature throughout Russia had already dropped to -20° centigrade, hugely increasing energy consumption and creating shortages. It was said to be the worst start to winter for the last fifty years in the Ukraine.

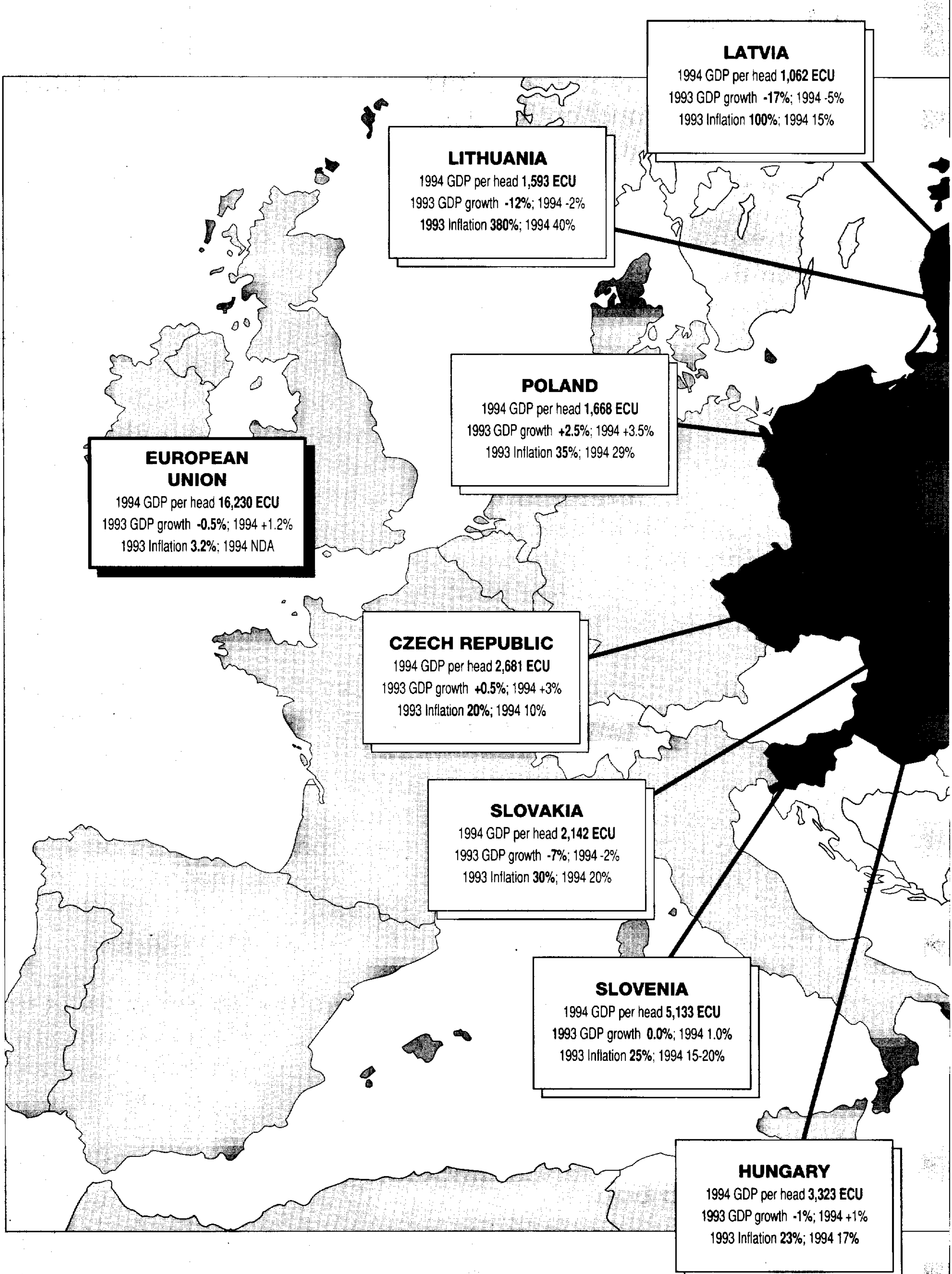
Amid the snows and freezing temperatures, hundreds of interviewers braved the weather to bring the views of their compatriots to our attention in Central and Eastern EUROBAROMETER No.4. The process was not without major difficulties. In the Ukraine and many other countries, interviewers walked up to ten kilometres in the snow to reach villages because buses had stopped running for lack of fuel. Apathy was prevalent, especially in the Commonwealth of Independent States, oftentimes because of worse-than-rudimentary living conditions and the belief that people's views did not count anyway. Suspicion played a role - a number of Albanians refused to answer questions because they thought the interviewers were tax collectors. Then, even when the questionnaires had finally been completed, lack of electricity delayed Armenia's results being processed in Yerevan for a whole week.

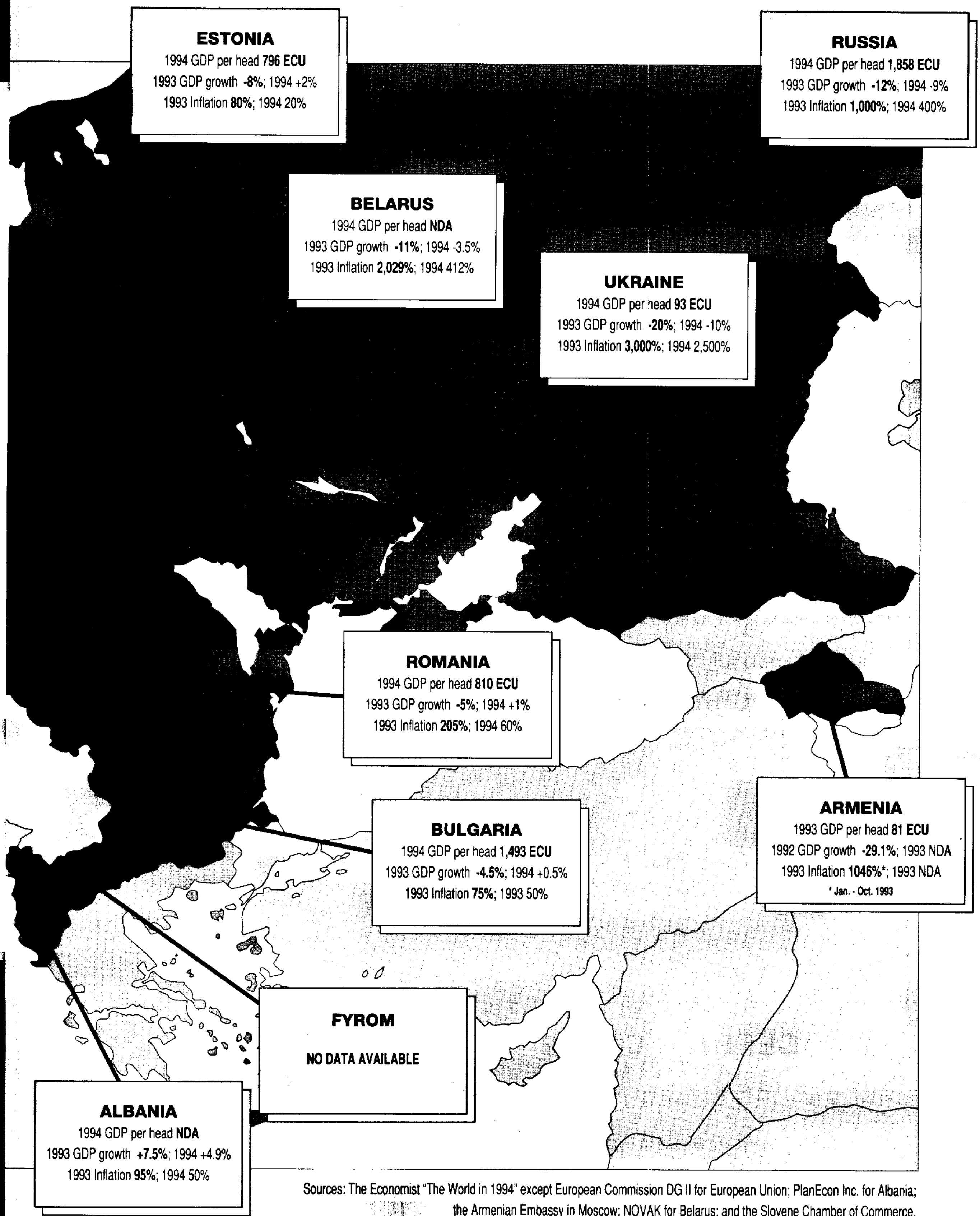
Georgia and Moldova were not surveyed this time, mainly because of lack of access to significant parts of those countries. Funding limitations reduced the number of questions polled on behalf of the European Commission this year. It is a tribute to Central and Eastern Europe that the public opinion and market research industry has sufficiently developed in the region to allow questions to be placed on an omnibus or "piggy-backed" on another survey in the same month in sixteen countries - a great success for the development of the market economy in the region only four years after the fall of the Berlin Wall.

The Central and Eastern EUROBAROMETER was also there at the start, and is in its fourth year of surveying public opinion in the region. In this report - apart from the normal analysis of current results and changes since a year ago - we take the opportunity of reviewing in brief how views have evolved on key issues where the longest time-series are available: Visegrad countries - the Czech Republic, Hungary, Poland and Slovakia - and Bulgaria.

COUNTRIES POLLED FOR CENTRAL & EASTERN EUROBAROMETER No.4 (Autumn 1993)

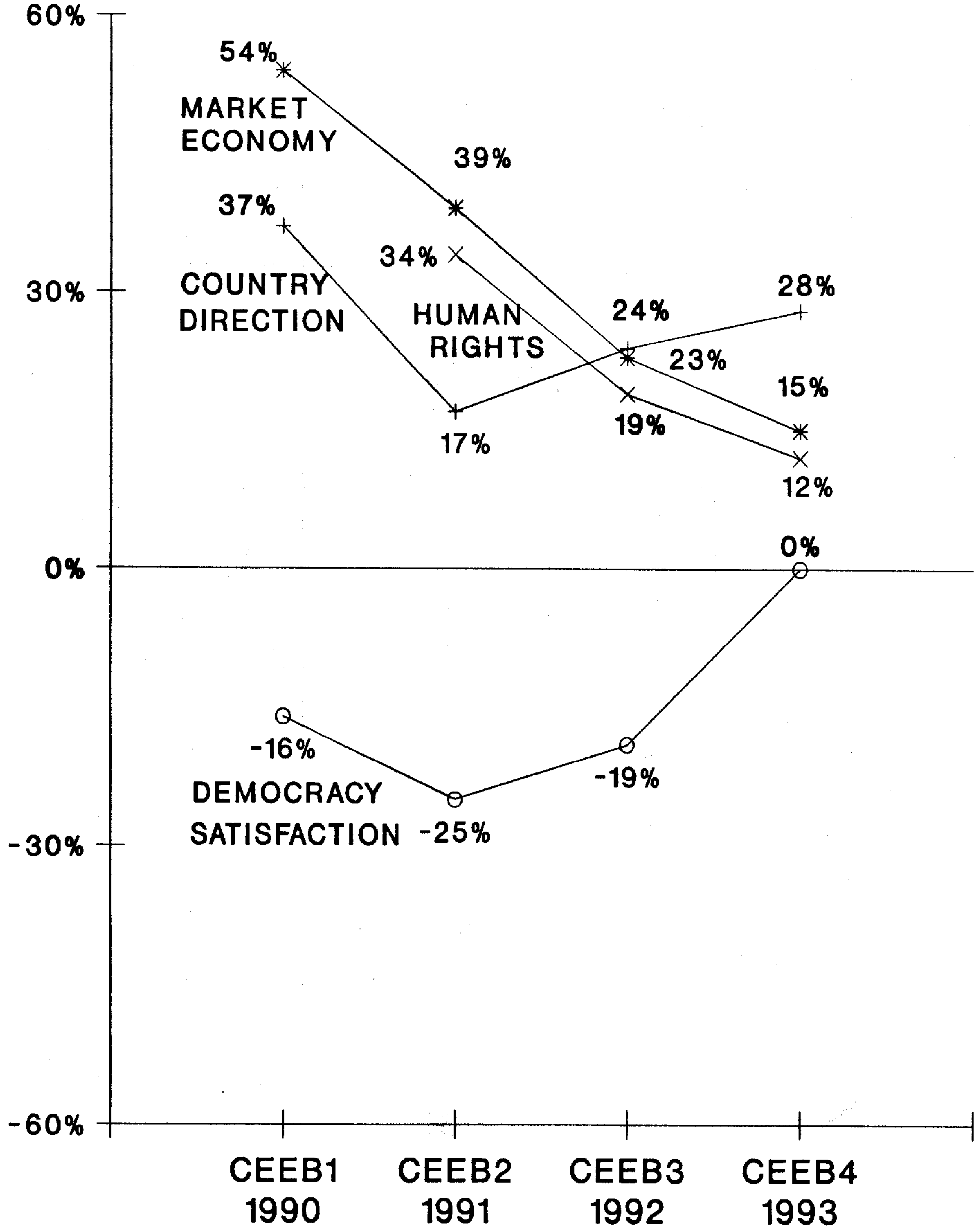
(European Union data given for comparison)



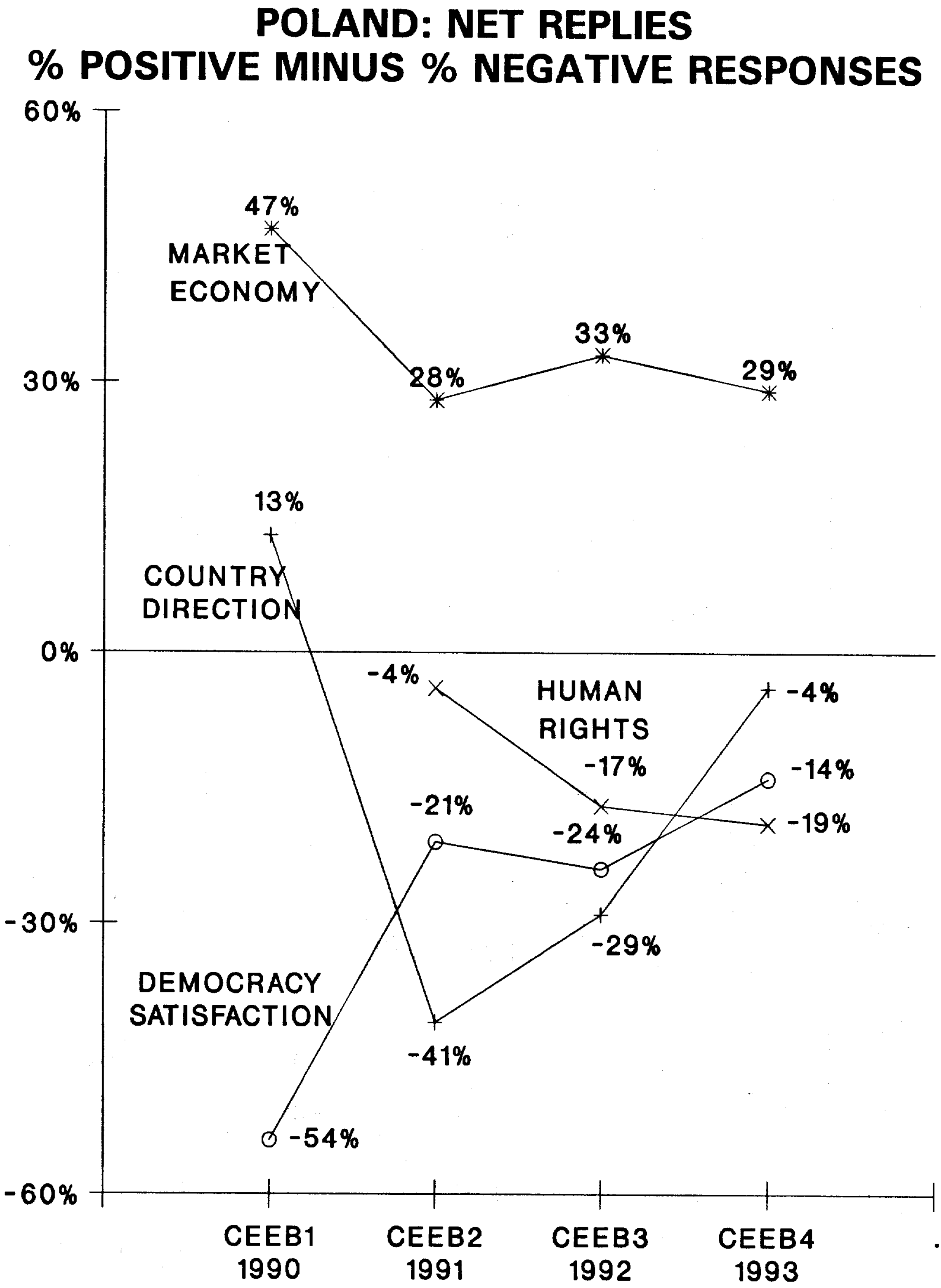


Sources: The Economist "The World in 1994" except European Commission DG II for European Union; PlanEcon Inc. for Albania; the Armenian Embassy in Moscow; NOVAK for Belarus; and the Slovene Chamber of Commerce. Conversion US$ 1.13 = 1 ECU. NDA = No data available. 1993 – Estimates; 1994 – Forecasts.

CZECH REPUBLIC: NET REPLIES
% POSITIVE MINUS % NEGATIVE RESPONSES



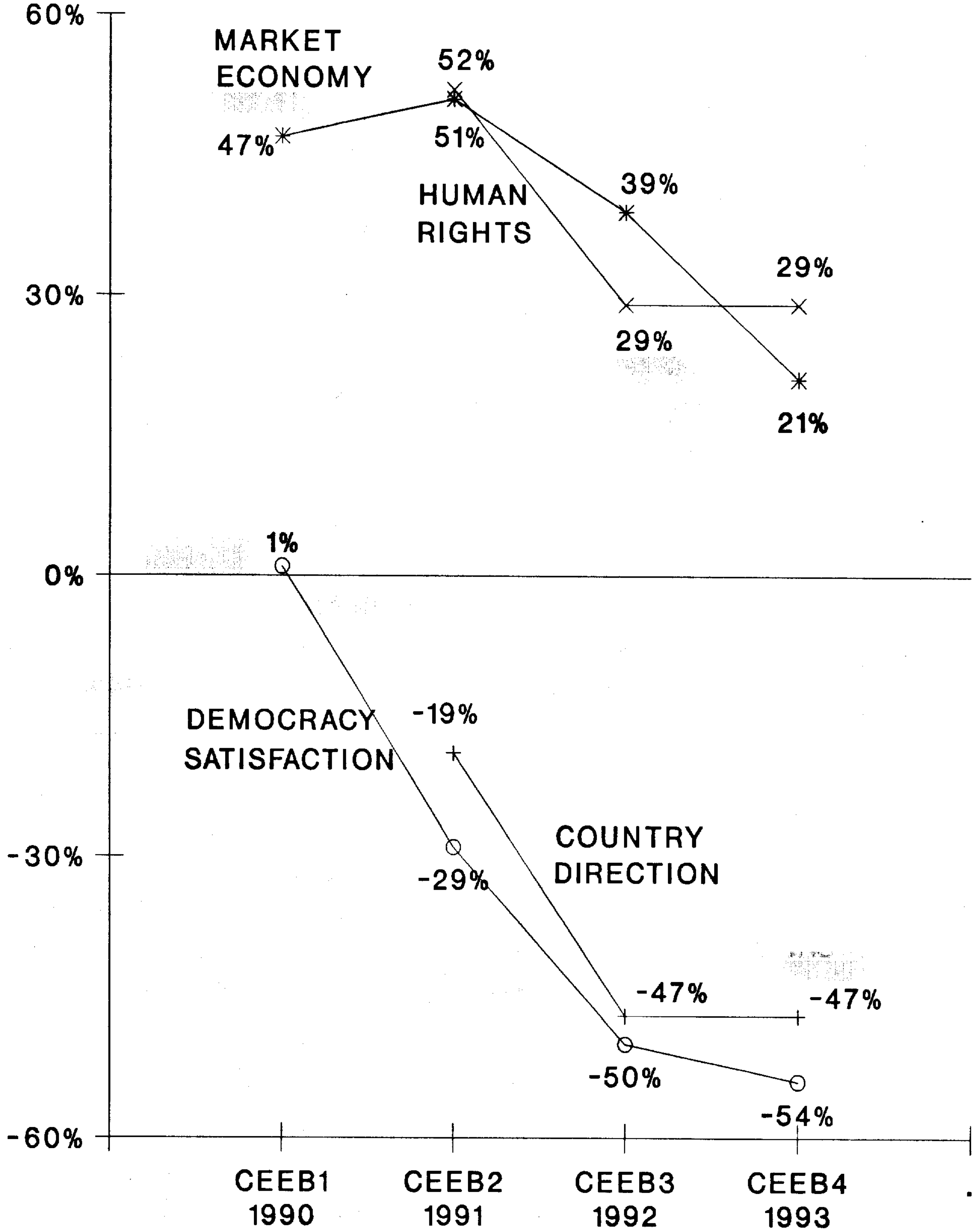
TEXT FIGURE 1 **EUROBAROMETER/GALLUP**



TEXT FIGURE 2

EUROBAROMETER/GALLUP

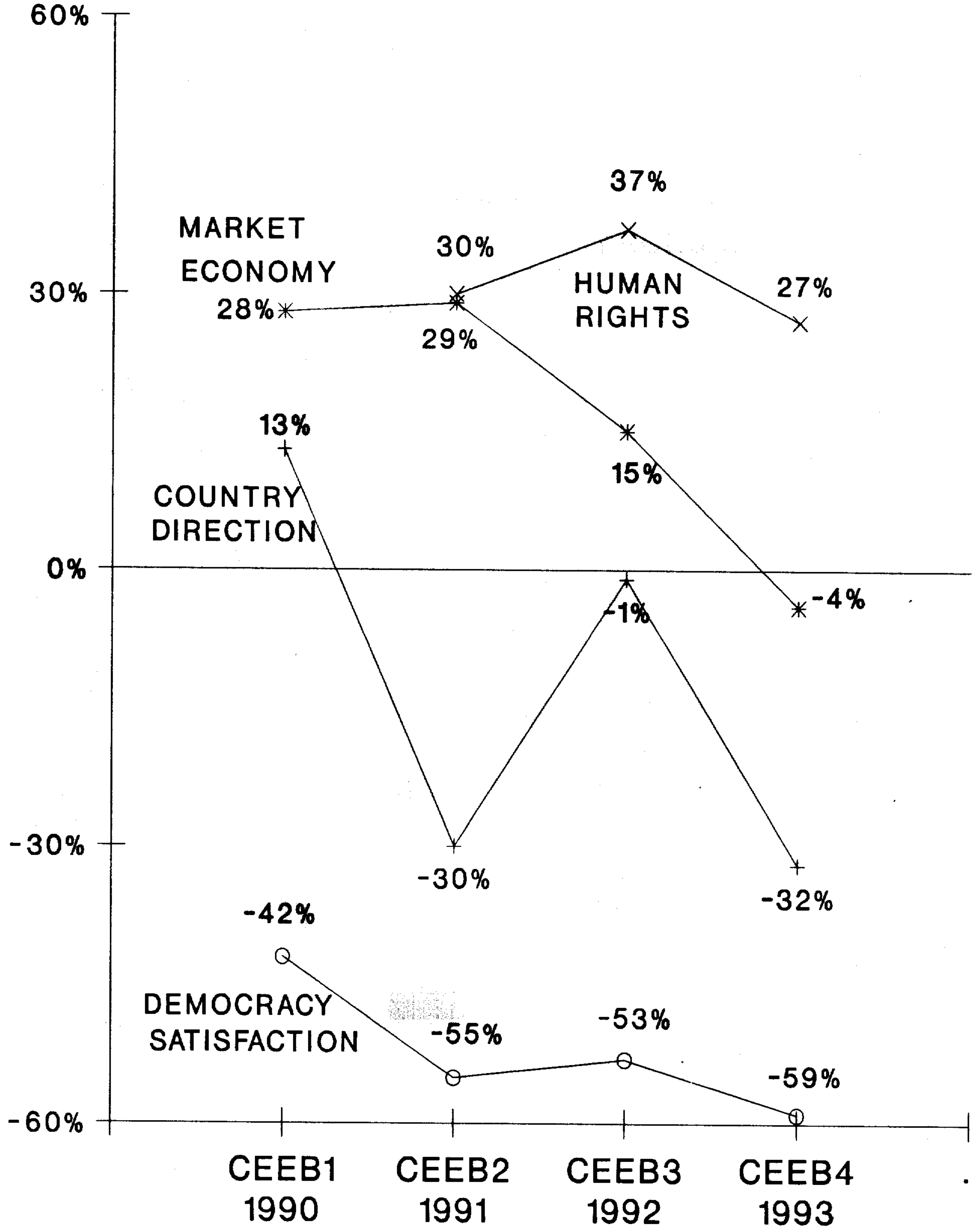
HUNGARY: NET REPLIES
% POSITIVE MINUS % NEGATIVE RESPONSES



TEXT FIGURE 3

EUROBAROMETER/GALLUP

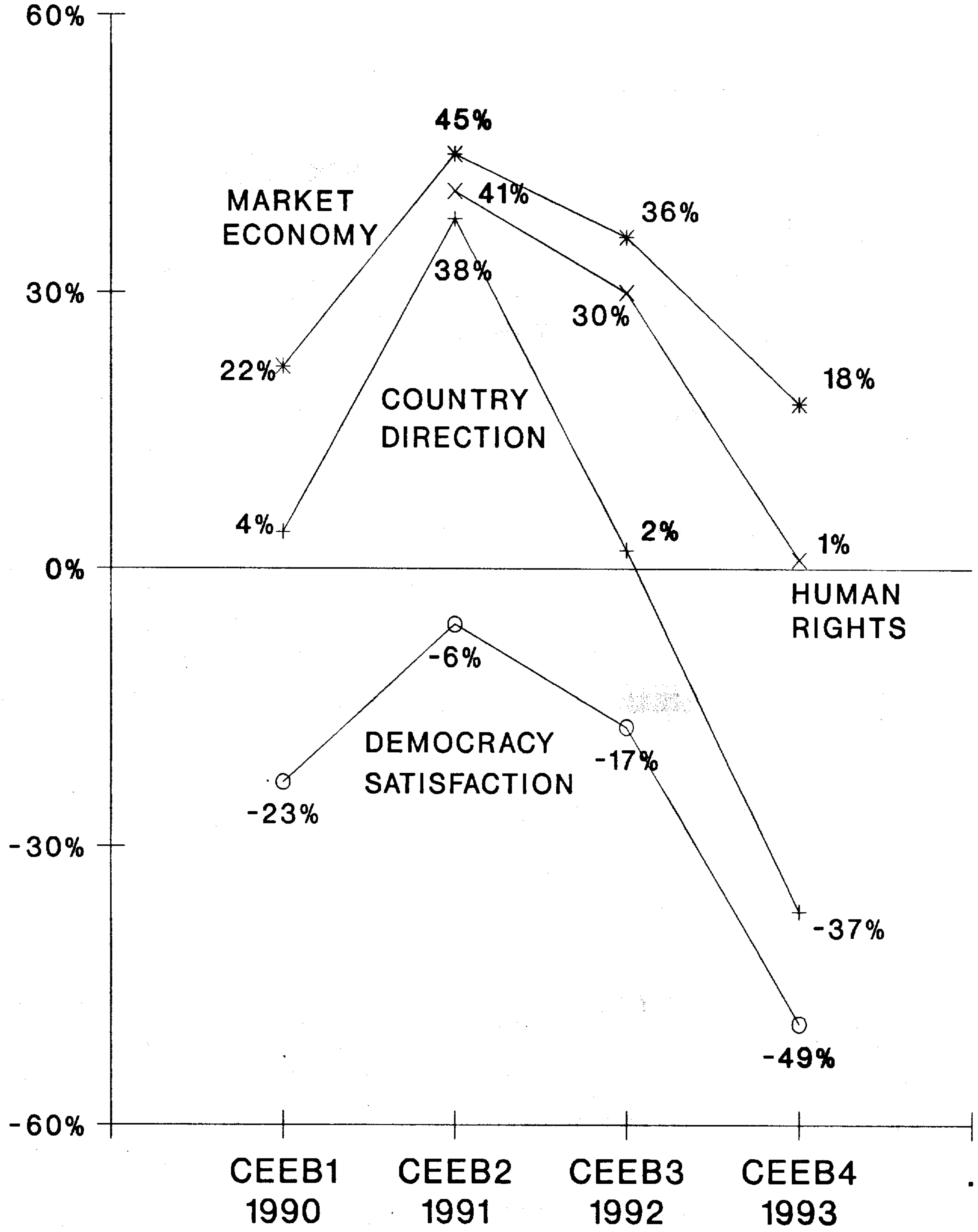
SLOVAKIA: NET REPLIES
% POSITIVE MINUS % NEGATIVE RESPONSES



TEXT FIGURE 4

EUROBAROMETER/GALLUP

BULGARIA: NET REPLIES
% POSITIVE MINUS % NEGATIVE RESPONSES



TEXT FIGURE 5

EUROBAROMETER/GALLUP

Among Visegrad countries[1], the **Czech Republic** seems in the best shape with none of its four standard indicators - country direction, support for market economy, satisfaction with democracy and human rights - in the negative this time. Commitment to the market economy, however, has been declining along with the numbers of people saying they believe human rights are being respected[2]. However, the recovery of faith in Czech democracy shows optimism not often found in many countries elsewhere (Text Figure 1).

Next comes **Poland**, most of whose people have continued their fairly steady commitment to the free market over the past three years despite very radical economic shock therapy. Since last year, Poland has registered big improvements in the direction people see their country going and satisfaction with their democracy (albeit still in the negative). The recent 19th September General Election seems to have ushered in a "wait-and-see" attitude towards their new government. Unlike fellow Visegrad countries, however, many Poles on balance continue to perceive there is a lack of respect for human rights (Text Figure 2).

Most **Hungarians** continue to show growing scepticism about their country's direction and development of democracy, as they brace themselves for elections in 1994. Faith in the market economy is declining but human rights are perceived by most to be largely upheld (Text Figure 3).

Slovaks[3] are perhaps in the most difficult position of the Visegrad Four. All their indicators decline this time. Divided feelings towards their "velvet dissolution" last year have mainly turned to unhappiness about their country's direction once again.

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[1] Results are for the PERMANENT RESIDENTS of these countries, not the ethnic groups of the region. Thus, in particular, "Estonians" and "Latvians" include all ethnic minorities permanently resident in those countries, whether they have the vote or not.

[2] In Central and Eastern EUROBAROMETER No. 3, an open-ended question was asked to clarify what people understood by the term "human rights". It showed that individual human rights concerns are expressed primarily in economic and social hardship terms, while those saying there is respect for human rights mainly give more conventional, political explanations, such as relatively newly-won freedoms.

[3] Note the sample size for Slovakia is smaller than the usual 1,000 persons interviewed: 471 for CEEB1; 354 for CEEB2; 734 for CEEB3; 684 for CEEB4.

Dissatisfaction with Slovakia's democratic development is stronger than even Hungary's, as the Slovakian government faced several political crises throughout 1993. Slovakia is also the only Visegrad country where people are split as to their support for the market economy. Human rights is the one bright star in an apparently darkening sky (Text Figure 4).

In **Bulgaria** - the only non-Visegrad country surveyed from Autumn 1990 onwards - matters have turned pessimistic in a sudden way since the very visible euphoria of two years ago, just after the UDF victory at the 13th October 1991 General Election. Although there is still (declining) majority support for the free market, and divided views about respect for human rights, there is deepening and serious levels of dissatisfaction with their country's direction and the development of democracy which makes the so-called Balkan "oasis of stability" look increasingly troubled (Text Figure 5).

In **Romania**, after initial doubts in Autumn 1991, most people continue to be in favour of the market economy. Some improvement has occurred since last time concerning satisfaction with their democracy, but Romanians are divided about their country's direction and perceived respect for human rights continues to fall.

The results of this year's Central and Eastern EUROBAROMETER generally show mixed progress, as most democratically-elected governments in the region bravely struggle to implement economic reforms for the long-term good - but at the short-term extreme pain - of their citizens.

Already visible in the previous Central and Eastern EUROBAROMETER, the new division of Eastern Europe continues apace. Increasing frustration and despair is being expressed among many citizens in the European parts of the Commonwealth of Independent States surveyed (termed the Euro-CIS[4] for the purposes of this report). Although by no means necessarily positive, the news is better in most countries outside the Euro-CIS, particularly among the indefatigable Albanians, whose views continue to defy gravity!

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[4] For the purposes of this survey, "Euro-CIS" is the combination of the views of the permanent residents of Armenia, Belarus, Russia (West of the Urals) and the Ukraine, weighted by population size.

Compared to a year ago, biggest improvements in our four indicators occur in the Baltic states of Estonia and Latvia. Estonia's results show a recovery from declines between October 1991 and November 1992[5], including now more positive than negative feelings about the state of their human rights (despite unresolved citizenship problems as a factor in that equation). However, despite rigorous market reforms in 1993, Latvia's equally strong performance this year has not quite recuperated its more significant falls between Central and Eastern EUROBAROMETER No.2 and No.3. By contrast, all of Lithuania's indicators decline. Despite stronger support for the market economy being registered than the two other Baltic states, its country's economic reform programme has in fact been largely in abeyance this year.

Surprisingly, relatively-wealthy **Slovenia registers the greatest decline** of all countries concerning our four indicators this time (along with Bulgaria as already discussed). Increasing doubts are being expressed by many Slovenes, especially about their country's direction and their commitments towards a market economy.

Asked in Central and Eastern EUROBAROMETER No.4 about **whether they feel things in their country are going in the right or wrong direction**, people in the Euro-CIS say by more than two-to-one that things are going in the wrong (56%) rather than right direction (24%). The largely negative view is also predominant in PHARE[6] recipient countries, but to a far lesser degree (34% "right"; 43% "wrong") (Annex Figure 1).

Over the past year, both pessimism (-7) and optimism (-3) have fallen in PHARE countries. The upsurge in those who "don't know" (+9) indicates that more people are reserving their judgement about what is happening in their country compared to last time, particularly in Visegrad countries (-12 "wrong direction"; +10 "don't know").

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[5] Graphics showing trends over the past three Central and Eastern EUROBAROMETER surveys for Albania, the three Baltic states, Romania and European Russia, although not published here, are available from "Surveys, Research, Analyses" Unit on request.

[6] PHARE (originally "Aid for the Economic Reconstruction of Poland and Hungary) is the name of the European Union's assistance programme to Albania, Bulgaria, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia and Slovenia. For the purposes of this survey, "PHARE" denominates the average values of the views of the permanent residents of the above countries, weighted by the respective country's population size.

Most Albanians, Czechs, Estonians and Latvians believe their country is going in the right direction. Poles are divided - with very many declaring they "don't know" (32%) following recent elections which herald a victory for reform-communist parties and their allies - along with Slovenes and Romanians. Absolute majorities of Slovaks, Bulgarians, Lithuanians and Hungarians think things in their country are going in the wrong direction.

Among PHARE countries, the biggest negative shifts occur in Bulgaria (+20 "wrong") and Slovenia (-27 "right"; +18 "wrong"). Apart from Poland's big fall in negative feelings (-20 "wrong"), big improvements are registered in two Baltic states - Estonia (+10 "right") and Latvia (+10 "right"). In Latvia, fieldwork coincides with celebrations marking the 75th Anniversary of the Republic (18th November 1918).

In the Euro-CIS, the numbers of those feeling their respective country is going in the wrong direction increases (+5) while optimism diminishes further (- 4). The air of pessimism is felt in all Euro-CIS countries, but substantially less so in European Russia (47% "wrong") than in the Ukraine (75% "wrong"), Armenia[7] (69%"wrong") and Belarus (64% "wrong"). Pessimism has slightly fallen in European Russia over the past year (-4 "wrong"), has remained stable at a very depressed levels in Armenia, and increased dramatically in Belarus (+15 "wrong") and Ukraine (+23 "wrong").

People from the Former Yugoslav Republic of Macedonia are divided (44% "right"; 40% "wrong") as to the direction of their state. Last year's results are little different (47% "right";43% "wrong").

1.2 Household finances

Despite progress in reorientating economies in the post-communist era in many countries, the benefits of any change have still to be perceived to be trickling down tangibly into people's pockets.

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[7] Armenians results this time are nationally-representative, including North-Eastern, Vai and Zangezur areas which were not surveyed last time. Changes since last year therefore EXCLUDE these areas for comparability purposes.

In 1993, real GDP growth was registered in three countries surveyed - Albania, Poland and (just) the Czech Republic, an improvement compared to 1992. It is anticipated that these countries' economy will continue to grow in 1994, and perhaps be joined by the first signs of real GDP growth (+0.5% to +2% forecast) in Estonia, Slovenia, Hungary, Romania and Bulgaria (see map for sources).

Nevertheless, the situation is quite different in the Euro-CIS. Here the biggest falls in 1993 real GDP growth for the whole region are registered: Armenia (-29% real GDP growth), Ukraine (-20%), Russia (-12%) and Belarus (-11%), with further falls anticipated for 1994.

Any benefits of reforms also have to keep up with high inflation, from an annual 20% in the Czech Republic to 3,000% in Ukraine in 1993. The Euro-CIS has the highest inflation with all four countries surveyed registering over 1,000% annual rate of inflation throughout 1993.

These economic conditions dictate that **only most Albanians (60%) say their household finances got better in the twelve months preceding November/December 1993,** when the fieldwork for this survey was undertaken there. Everywhere else most people say the financial situation of their household got worse (Annex Figure 2).

Taking people's opinions in PHARE recipient countries as a whole, 56% say their household finances got worse, 29% that they stayed the same, and only 13% that they got better. The weighted average result for people's views in PHARE countries is almost the same (56:29:13) as for the Former Yugoslav Republic of Macedonia (56:30:12).

Compared to how they perceived the state of their household finances in 1992 (as shown in Central and Eastern EUROBAROMETER No. 3), less people say finances got worse in 1993 in Estonia (-26 "got worse") and Latvia (-18 "got worse"). Many Bulgarians (+ 11 "got worse") and Romanians (+12 "got worse") experienced the opposite.

The Euro-CIS result even more clearly portrays the evolving divisions between rich and poor within societies - fewer remained unaffected (21% "stayed the same") than in PHARE countries generally, while more got richer on the one hand (16%) and poorer on the other (63%). Notably there were significantly fewer worse off in European Russia (53%) than in other parts of the Euro-CIS (Armenia and Belarus: both 71%; Ukraine: 82% "worse").

Biggest perceived falls in household finances in the Euro-CIS seem to have taken place in the Ukraine (+16) between 1992 and 1993.

Looking forward to the next twelve months, the perceived situation seems marginally more optimistic. Almost as many in PHARE countries think that their household finances will stay the same (30%) as fall (32%), but those believing household finances will improve are less numerous (26%) (Annex Figure 3).

Most Albanians (59%) expect their household finances to improve in 1994. Many Slovenes think on balance their financial situation will get better or stay the same. Romanians, Czechs, Estonians, Poles and Latvians are divided. More Lithuanians are pessimistic than optimistic, while Slovaks, Bulgarians and Hungarians show the most frequent pessimism among PHARE recipient countries.

For the past two years, many Bulgarians had - on balance - hoped their household finances would improve the following year and had been disappointed each time. Many Romanian hopes have similarly been dashed on those same occasions. Now, the results show many Bulgarians and Romanians becoming more cautious in their assessment as to what may happen next time.

Compared to the last Central and Eastern EUROBAROMETER (No. 3), peoples' household finances in 1993 everywhere generally were reported to have turned out worse than people had originally thought they would.

In Euro-CIS countries overall, people are more likely to think household finances will decline (37%) rather than stay the same (23%) or get better (17%) in 1994. Once again, there is a big difference on this issue in European Russia and the others. While Russians are in fact divided about what will happen, most of their Euro-CIS colleagues on balance expect increased financial hardship, especially an absolute majority of Ukrainians.

In the Former Yugoslav Republic of Macedonia, people are rather more balanced in their expectations than in PHARE countries as a whole. They are more likely to say their finances will stay the same (39%) rather than increase (29%) or decrease (25%) in 1994.

The European Union (EU)[8] has been hit by economic recession too. According to Eurostat, the combined economies of the Twelve shrunk in 1993 (real GDP growth -0.5%) and not much growth is anticipated in 1994 overall (real GDP growth, +1.2%). While unemployment continues to grow (October 1993: 10.7%), at least inflation remains under control (1993: 3.2%).

Average household finances are not as much affected by the downturn in the European Union's economies (given the fact that 89.3% are still in employment). Half of all EU citizens say that their household finances stayed the same in 1993 (50%), while a third (34%) say they got worse and a sixth that they got better (15%). Not much change is expected for 1994 (23% "better"; 49% "same"; 24% "worse"). Only quite a number of East Germans report improvements in their household finances in the preceding twelve months (40:41:19).

1.3 Economic reform and privatisation

Here the differences between people's views in PHARE-recipient countries and the Euro-CIS is perhaps at their starkest[9].

Asked whether they personally feel that the creation of a free market economy, that is one largely free from state control, is right or wrong for the future of their country, people from PHARE-recipient countries are convinced by a majority of almost two-to-one that the market economy is right (51%) rather than wrong (27%) for them. By contrast, the citizens of the Euro-CIS say by a majority of around two-to-one that a market economy is wrong (53%) rather than right (30%) for their country (Annex Figure 4).

[8] The European Union came into existence on 1st November 1993 when the Treaty of Maastricht came into force. See standard EUROBAROMETER report No. 40 (Autumn 1993) for full details of all results concerning public opinion within the Union.

[9] See the Central and Eastern EUROBAROMETER No. 3 (Autumn 1992) supplement: "The Socio-demographics of Change" also for a detailed analysis of the wide gap in the views between the "haves" and "have nots", young and old, urban and rural, intelligentsia and blue collar workers concerning economic and democratic reforms in the region (for documentation, please write or fax "Surveys, Research, Analyses" Unit at the European Commission).

Support for the market economy has fallen in both PHARE recipient countries and the Euro-CIS (both -6 "right") since a year ago. Nevertheless, opposition remains largely unchanged in PHARE countries (+2 "wrong") compared to a worsening of the situation in the Euro-CIS (+8 "wrong").

There are majorities in favour of the market economy in eight PHARE-recipient countries - Albania (71%), Lithuania (57%), Poland (53%), Romania (52%), Estonia (52%), Czech Republic (51%), Bulgaria (47%) and Hungary (46%). Latvians, Slovenes and Slovaks are divided on the issue. Nowhere is there a majority against.

However since a year ago, support for the market economy has fallen primarily in Slovenia (-20 "right"), Romania (-13), Slovakia (-11) and Hungary (-10), while those thinking the market economy is wrong for their country increased the most in Slovenia (+14 "wrong") and in Bulgaria (+10). Most PHARE countries experience falls in public support for the market economy (except in Albania, Estonia and Latvia) this time, but this is twice as likely to have led to an increase in the numbers of those who "don't know" rather than those who oppose it.

In Euro-CIS countries, there are absolute majorities against the market economy, ranging from half of all Ukrainians to two-thirds of Armenians. Nowhere there are more than a third in favour of a market economy. Support declines everywhere.

The Former Yugoslav Republic of Macedonia this time falls more into the Euro-CIS type of result. Half of its citizens are against the market economy, with around a third in favour.

People in PHARE countries and the Euro-CIS overall almost equally say that the speed of economic reform is too slow (39% and 35% respectively). Twice as many in PHARE (20%) as Euro-CIS (9%) are satisfied that the speed is about right. Around a sixth (16% and 17%) in both say it is too fast (Annex Figure 5).

Nevertheless, the biggest difference is that three times more people in the Euro-CIS say spontaneously that reforms have not even begun (22%) in their country, than people in PHARE countries (7%), on average.

Around **an eighth** of Bulgarians, Romanians and Latvians complain spontaneously that there are no reforms in their country, the highest result in PHARE countries. By contrast, **between a quarter and a third** have the same complaint in Armenia, Ukraine and Belarus (and Ukraine's complaint has increased by a significant +23 since last time). In European Russia, **a fifth** say there are no reforms taking place.

More Bulgarians, Slovenes, Lithuanians, Slovaks, Latvians, Hungarians and Estonians say things are going too slowly (than about the right speed and too fast *combined*). By the same measure Poles, Albanians and Romanians are divided. Half of all Czechs are content that economic reform is progressing at about the right speed, with about the same numbers (a fifth) in each of the "too fast" and "too slow" camps.

In Albania (-21 "too slow"), Poland (-10) and Slovenia (-10) in particular, less people want economic reform to go faster than was the case in Autumn 1992. Support for speeding up economic reform increases the most in Lithuania (+18 "too slow") and Slovakia (+16).

In the Former Yugoslav Republic of Macedonia, the urgency of economic reform is clear, despite largely negative feelings towards the market economy. Nearly half say reforms are going too slow, four times as many as say they are too going too fast. Problems with international recognition of the country coupled with sanctions against neighbouring Serbia have hurt its economy.

Privatisation of state enterprises has roughly the same response. Citizens of Euro-CIS countries are as persistent that privatisation of state enterprises is going too slowly for them (38%) as people from PHARE countries on average (36%). However, people from PHARE countries are more likely to say that privatisation is going about the right speed (19%) or too fast (20%) than people from the Euro-CIS (13% "right speed" and 15% "too fast"). However, a quarter of people from PHARE countries and a third in the Euro-CIS say they "don't know" (Annex Figure 6).

Again *combining* those who feel **privatisation of state enterprises** is progressing at the right speed and too fast for ease of analysis, **the sentiment that things are going too slowly in this field is most keenly felt in Slovakia, followed by Bulgaria, Romania, Latvia, Albania and Estonia.** The situation is not as clear-cut in Slovenia, Lithuania and the Czech Republic where, nevertheless, those who say privatisation is going too slow, are more numerous than those saying it is going too fast.

While Hungary is divided, more Poles say the speed of privatising state enterprises is going too fast this time (31%) rather than about right (17%) or too slow (24%). Over half of Poland's GDP is now generated from the private sector, the small Warsaw stock exchange has performed wonderfully in 1993 and a major sell-off of the state sector is promised for the near future. This result suggests - despite the very real success of Poland's new market economy - that the psychological groundwork among Polish citizens for the sell-off needs more careful preparation.

Since Central and Eastern EUROBAROMETER No. 3 (Autumn 1992), the view that privatisation of state enterprises is going too slowly has increased the most in Slovakia (+15) and the Ukraine (+10) but also experienced major declines in European Russia (-15), Slovenia (-14), Poland (-13), Albania (-12) and Romania (-11).

Of all countries in the entire region surveyed, Ukrainians are the keenest to say that privatisation of the state sector should proceed more quickly. For the Euro-CIS, this is followed by relative majorities of Belarusians and Armenians. However, Russians are not that convinced, with more saying things are going too fast and about the right speed *combined*, than too slow.

People in the Former Yugoslav Republic of Macedonia are divided between those saying privatisation is going too fast and those saying it is going too slow.

1.4 Democracy and human rights

One of the big surprises for many observers immediately after the fall of the Berlin Wall was how quickly most Eastern Europeans became disillusioned with their newly-found democracy. Already by Autumn 1991, only Lithuania had a majority satisfied with the development of their country's democracy, a result that was repeated in Autumn 1992. This year, even most Lithuanians have become disillusioned. **Now, no country - in PHARE or the Euro-CIS - registers a majority satisfied with the development of their country's democracy** (Annex Figure 7).

In PHARE countries, people are on average around two-to-one dissatisfied (57%) rather than satisfied (32%) with how their democracy is developing. In Euro-CIS, dissatisfaction levels are almost five-to-one (71% "dissatisfied"; 15% "satisfied").

Perceptions concerning democracy's development have not changed much in PHARE countries overall compared to last time (0 "satisfied"; -4 "not satisfied"), nor in the Euro-CIS (+3;-3).

Only the Czechs are divided between those satisfied and dissatisfied with their democracy. The biggest dissatisfaction among PHARE countries is registered in the Visegrad countries of Hungary and Slovakia, where around three-quarters are dissatisfied. The Former Yugoslav Republic of Macedonia also has more dissatisfied than satisfied. Armenia has the biggest dissatisfaction level (84%) among the Euro-CIS and in the region overall.

Satisfaction **with the development of democracy** increases the most in the past twelve months in Latvia (+13 "satisfied") and the Czech Republic (+10), while dissatisfaction also decreases the most significantly in Estonia (-12 "not satisfied") and Romania (-13).

By contrast, dissatisfaction with the development of democracy has climbed, especially in Bulgaria (+16 "not satisfied"), Lithuania (+13) and Slovenia (+10).

There is also mounting public disillusionment with how national democracy works within the Twelve Member States of the European Union compared to a year ago (although things have stabilised since the last survey six months ago). Now 54% of EU citizens are dissatisfied and only 43% satisfied with the way their country's democracy works[10].

People in Central and Eastern European were asked **whether they feel there is respect for individual human rights in their country or not**[11]. PHARE country results are split (44% "a lot/some respect"; 49% "not much/at all respect"). Three-quarters of people in the Euro-CIS, however, say there is "not much/at all respect" (75%), while only a fifth (21%) say there is "a lot/some respect" (Annex Figure 8).

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[10] In the standard EUROBAROMETER, respondents are asked about their satisfaction *WITH THE WAY DEMOCRACY WORKS* in their country. In the Central and Eastern EUROBAROMETER, *WITH THE WAY DEMOCRACY IS DEVELOPING* in their country. See standard EUROBAROMETER report No. 40 (Autumn 1993) for full results.

[11] See footnote 2 about the meanings of the term "human rights" in the region.

Absolute majorities say human rights are respected a "lot/some" in three out of four Visegrad countries (Hungary, Slovakia and the Czech Republic) as well as in Albania and Estonia. Most people from the Former Yugoslav Republic of Macedonia also say theirs are generally respected. Bulgarians are divided, while majorities of Romanians, Slovenes, Latvians, Poles and three quarters of Lithuanians complain theirs **are largely not respected.** Most Russians and Ukrainians are as gloomy as Lithuanians, while Armenians are even more so. Belarus comes out relatively well among Euro-CIS countries with "only" two-to-one saying there is "not much/at all" respect rather than a "lot/some" respect for individual human rights.

Since last year, the picture has got worse overall. "Not much/not at all" respect for individual human rights is given more frequently as an answer in both PHARE (+8) and Euro-CIS countries (+10).

This time, significantly more Estonians say human rights are respected (+13 "lot/some") but views concerning lack of respect have grown the most significantly in Lithuania (+24 "not much/at all"), Bulgaria (+18), the Ukraine (+16), Armenia (+16) and Slovenia (+ 15).

Steps are being taken in Estonia and Latvia to try and resolve citizenship problems facing their large ethnic minorities with the help of the Council of Europe and the Conference on Security and Cooperation in Europe. In Estonia, the ethnic majority are two-to-one (61:33) of the opinion that human rights are respected, while the *combined* view of their minorities shows more (45:51) saying there is "not much/at all" respect. In Latvia, the ethnic majority is much more divided (48:49) while ethnic minorities are more likely to say there is "not much/at all" respect (41:56) as well.

However, Estonia's ethnic minorities have improved their opinion on this subject since last year (+13 "lot/some" respect; -15 "not much/at all" respect) equally with their ethnic majority (+14; -1, as far fewer "don't know"). Latvia's ethnic majority is marginally less likely to say human rights are respected (-2; +4) compared to last time, while their minorities' viewpoint has also improved (+11; -6).

2. THE EUROPEAN UNION

2.1 Where do countries' futures lie?

As political developments unfold in the region, shifts occur in people's perceptions of where their country's future may lie. Asked for the first time in Central and Eastern EUROBAROMETER No.3, three "key players" were perceived as the most important forces for the region - the European Community, Russia and, to a lesser degree, the United States. Although this year's results confirm the predominance of the first two (outside Russia) in particular, important adjustments in people's outlooks have occurred.

Taking results for the region as a whole *excluding* European Russia[12], nearly three out of ten this time see the future of their country most closely tied up with the European Union (29%), almost a quarter with Russia (22%) and around a tenth with the United States (11%) (Annex Figures 9-13).

Another fifth see other possible "tie-ups": other European countries like Austria, Switzerland, Sweden and Finland (9%), other Central and Eastern European countries (6%), Japan/Korea (2%) and Turkey (1%). Germany is spontaneously mentioned independently of the European Union by some (3%). Few say spontaneously that they should depend on themselves (4%) or that none of the above are tied to their country's future (1%).

In the region as a whole excluding Russia, the European Union (+3) and Russia (+3) have gained in "future influence". The main loser is the United States (-6), with about a third less people compared to last year thinking now their country's future is tied up with it (17% then, 11% now).

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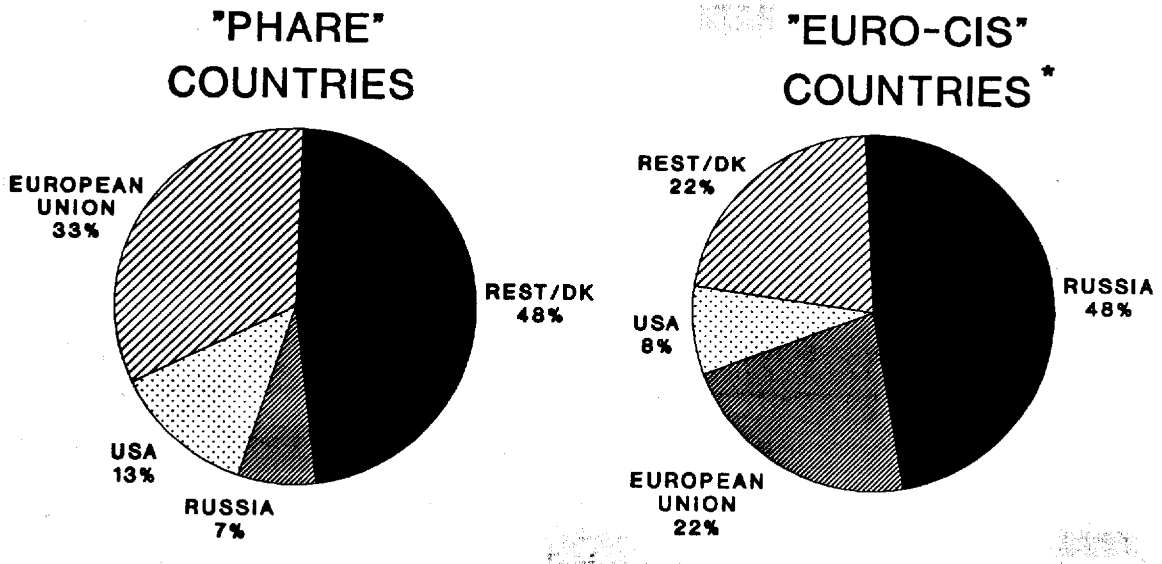
[12] As "Russia" was one of the answer categories, Russians West of the Urals were asked "other CIS countries" as a substitute. Hence, results for European Russia are reported separately from the rest of the region. The technical error in the Polish result of this question last year has been corrected and all shifts reflect this amendment.

MOST IMPORTANT FUTURE PARTNER FOR PEOPLE IN ...

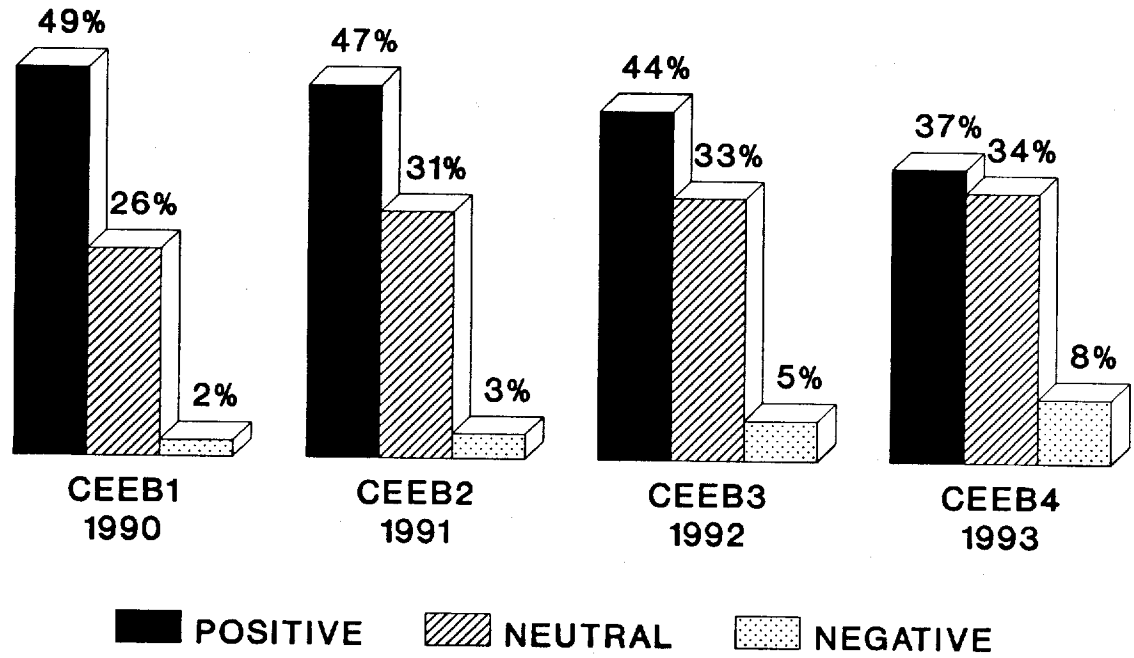


* EXCLUDING RUSSIA

TEXT FIGURE 6

EUROBAROMETER/GALLUP

EUROPEAN UNION'S IMAGE IN VISEGRAD



TEXT FIGURE 7

EUROBAROMETER/GALLUP

Objectively, the reemergence of Russia as a regional power is clear. Last year, more Armenians answered spontaneously that their country's future belongs to no-one but themselves (33% "depend on ourselves" plus "none of them") than anything else. Then came Russia (29%) and the United States (23%). Now an overwhelming 72% of Armenians acknowledge the influence of Russia, a +43 increase for Russia in the space of just one year. Only 4% of Armenians now say their future is on their own.

Unlike in Armenia, Russia was already foremost in people's minds last year in both Belarus (54%) and the Ukraine (39%). This time, Russia continues to be predominant among most Belarusians (50%). Their country recently agreed monetary union with Russia. There has been a +7 rise in Russia's importance in the Ukraine (46%), where relations are often less warm.

Russia is also a strong consideration for many people living in Baltic states - in Lithuania (29%, a much weaker first place) and in Latvia especially (27%, equal with "other European countries like Austria, Switzerland, Sweden and Finland"), but not much in Estonia (13%). Since last year, Russia's perceived future influence in the Baltic states has marginally declined (-4) and currently rests at 25%, virtually equal with "other European countries like Austria, Switzerland, Sweden and Finland" (23%) and the European Union (21%).

Taking ***Euro-CIS results excluding Russia*** as a whole, 48% of people in the region see their country's future tied up with Russia, 22% with the European Union and 8% with the United States (Text Figure 6).

The European Union maintains its predominant position among PHARE countries (33%) virtually unchanged (-1) from last time. It is the top result in Albania (60%), the Czech Republic (46%), Slovenia (41%), Slovakia (37%), Poland (36%) and Romania (32%). It is also in first place among a quarter of Hungarians (24%) and Bulgarians (24%). The European Union therefore comes first in all countries where it has signed Europe Agreements - the Visegrad Four, Bulgaria and Romania.

The EU's position gains the most in Estonia (+9), Slovenia (+8) and, interestingly, the Ukraine (+7, now in second place after Russia). It falls by far the most in Bulgaria (-13). It is hoped that the recent (much awaited and long delayed) Interim Europe Agreement between Bulgaria and the European Union - adopted by the European Council just after fieldwork for this survey was completed and due to take effect on 31st December 1993 - will increase confidence in the long-term nature of this relationship.

The United States continues to have pride of place in Russian minds (26%), much to the same degree as last time (+1), but many Russians are not oblivious to their future concerning other CIS countries (21%), in which commitment has largely stayed the same (-2) since a year ago.

The United States loses the most ground this time in Armenia (-11) and Poland (-10). However its position has strengthened in the Former Yugoslav Republic of Macedonia (+6), where it now finds itself (29%) ahead of everyone else. However, a quarter (24%) of people in the Former Yugoslav Republic of Macedonia now say they should depend on themselves (+14), while less (-7) say the EU (18%) is their future. "Other European countries like Austria, Switzerland, Sweden and Finland" are still the first choice of more than a quarter of Estonians (43%, where it is easily first), Slovenes, Slovaks, Czechs and Latvians.

2.2 The European Union's image in the region

As has been seen, much is expected of the European Union, especially by people from those countries it has signed Europe Agreements with.

As is well known, the European Union has risen to that challenge, committing over 3.3 billion ECU from its PHARE programme and over 1.3 billion ECU from its TACIS programme (Technical Assistance to the Commonwealth of Independent States) by the end of 1993 to help establish market economies in the region. It also disbursed loans, loan guarantees, medical and food aid. By September 1993, the European Union and its Member States had committed 65% of world assistance given to the CIS and 45% to PHARE recipient countries.[13]

[13] Source for EU-East European trade and aid: External Information Division, Directorate-General X, European Commission.

"Europe Agreements" establishing associations between the European Union and the Visegrad Four, Bulgaria and Romania have been signed, geared to their possible future membership of the Union. Negotiations for a similar agreement with Slovenia have begun. "Partnership and Cooperation Agreements" are also being negotiated with individual CIS countries to strengthen political and economic ties. Trade and cooperation agreements already exist with CIS countries as well as with Albania, Slovenia and the Baltic states.

The European Union imports 78% of all products bought by OECD countries from its six Eastern European associate countries. However, the trade surplus between them had grown to 2.5 billion ECU in the Community's favour by the end of 1992.

Asked whether their **impressions of the aims and activities of the European Community are generally positive, neutral or negative,** more people in PHARE countries on balance say it is positive (40%) rather than say "neutral" (29%) or "negative" (9%). The result is not that much different in the Euro-CIS as a whole (38:29:6) (Annex Figure 14).

With the exception of the Former Yugoslav Republic of Macedonia - where people are divided - **at least twice as many people from all countries in the region have a positive rather than negative image of the European Community.**

Albanians, Lithuanians, Romanians, Bulgarians and Latvians are more likely to say the European Community's image is positive, rather than *neutral or negative combined*. By the same measure, Slovaks, Poles and Hungarians are split. Czechs, Estonians and Slovenes tend more to the "neutral". Slovenes have the highest percentage of those "negative" about the European Union among PHARE countries (15%).

In the Euro-CIS, an absolute majority of Armenians are positive towards the European Community. While a relative majority of Ukrainians say they are positive, Belarusians and Russians are more balanced between those "positive" and "neutral" about it.

Nevertheless, the positive image of the European Community has declined over the past year, both in PHARE countries overall (-7 points "positive"; +2 "neutral"; +4 "negative") as well as the Euro-CIS (-4; +2; +4).

On the other hand there are significant positive movements, notably in Armenia (+16 "positive") as well as Slovakia (+9). The European Union increased its food and medical aid in 1993 to Armenia to ten times the level of 1992. However, heavy falls in positive impressions of the European Union also occur in Slovenia (-15 "positive", despite a Europe Agreement being negotiated), Poland (-11), Romania (-10) and Bulgaria (-9).

The gradual decline of the European Union's image in Visegrad countries continues. Undoubtedly, expectations concerning the "West" were unrealistically high at the start and the new reality has taken its toll. Delays in Europe Agreements coming into force and trade disputes may also have been more recent factors. Since Autumn 1990, positive views about "the aims and activities of the European Community" have fallen 12 points in Visegrad as a whole, those neutral have increased 8 points, while negative views have gone up 6 points. Now views are almost balanced between those "positive" (37%) and "neutral" (34%), with those outright negative still very few (8%) (Text Figure 7).

Since 1990, Czech results have become a little less positive and a little more neutral every year, with a significant rise of those "negative" (+7) in 1993. Positive impressions towards the European Community decreased quite steeply in Hungary between 1990 and 1992 (-17), steadying (+2) this year. In Poland, positive feelings remained numerous throughout 1990-1992 at just under half the population before decreasing steeply (-10) this year. Only many Slovaks buck the trend, with this year's rise in respondents with positive feelings (+9) reversing some of their largely "neutral" trend until now.

3. POST-ELECTION RUSSIA[14]

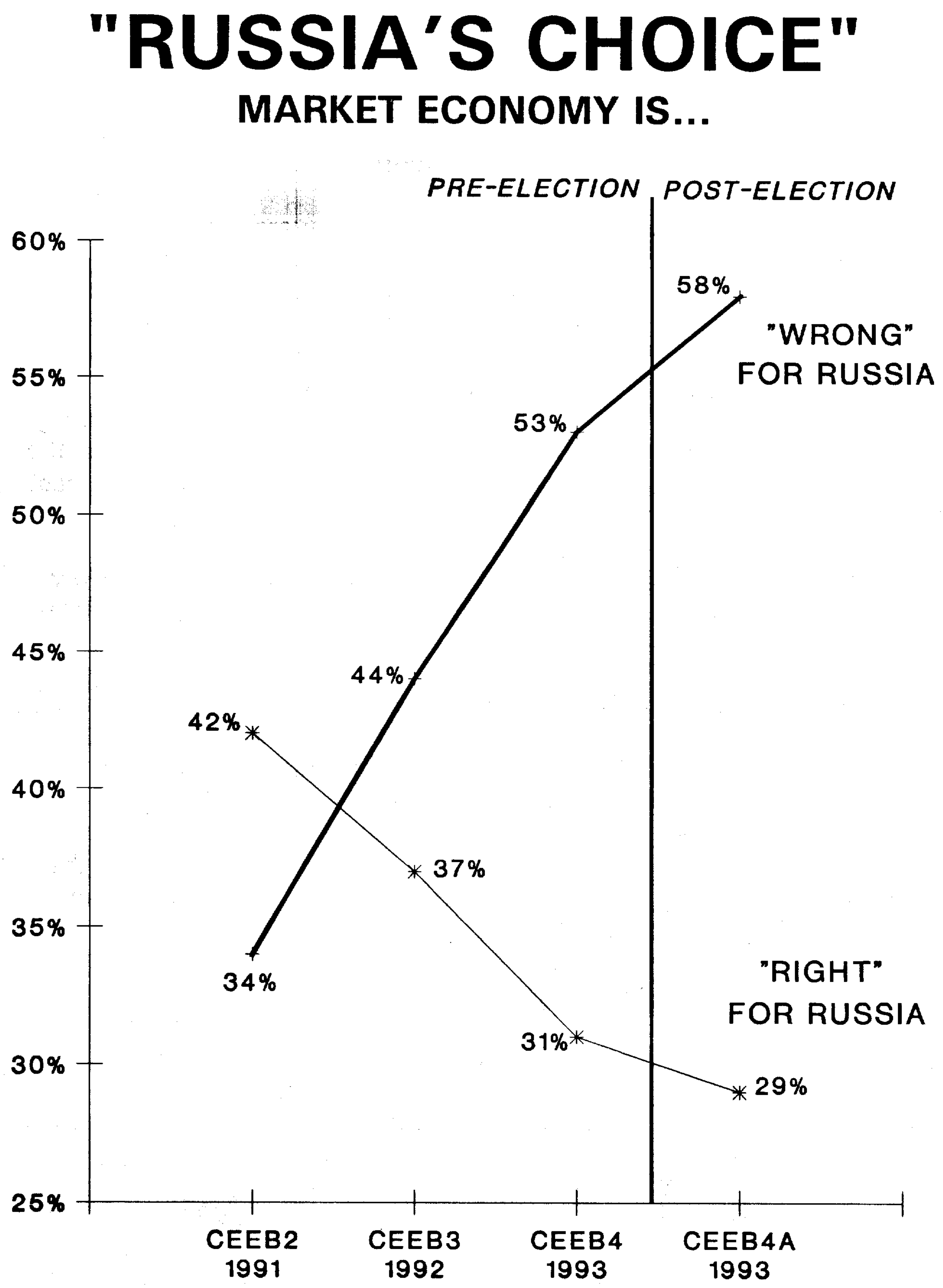
3.1 Overall situation and economic reform

Political commentators and pre-election surveys were predicting a victory for Russia's pro-reform blocs - and in particular Yegor Gaidar's "Russia's Choice" - throughout much of the run-up to the Parliamentary elections scheduled for 12th December 1993. As often in the run-up to the real event, the first signs of a surge in popular mood for the anti-reform blocs and parties was observed just before the last week of the election campaign. After that week, during which no public opinion survey results could be published, many analysts were surprised at the extent to which this "sudden surge" actually translated into votes cast for anti-reform blocs and parties.

The outcome was indeed a victory for the economic reform "go slow" camp. Surveys at the beginning of the campaign suggested the ultra-nationalist Liberal Democrat Party of Vladimir Zhirinovsky had the support of between 2% and 7% of the population. But once his message started being heard, his party finally came first with (23.8%) of the vote, followed by Russia's Choice (15.4%), not that far ahead of the Communist Party (12.4%). The three main anti-reform blocs (the Liberal Democrat Party, the Communist Party of the Russian Federation, and the Agrarian Party) gained 182 seats in the State Duma. The four pro-reform blocs (Russia's Choice, the Yavlinsky-Boldyrev-Lukin bloc, the Party of Russian Unity and Concord, and the Russian Movement for Democratic Reform) now hold 164 seats. The balance of power therefore rests with independents and other parties.

Yet the election result should not have been a surprise for readers of Central and Eastern EUROBAROMETER reports. For much of the basis of the reform camp's political platform had been eroded by public opinion long before the recent Parliamentary elections were even called.

[14] An additional representative sample of 1087 persons of the 15+ age group was surveyed from 13th-31st December 1993 in Russia West of the Urals immediately after the 12th December 1993 Russian Parliamentary elections. Our thanks to ROMIR for help in the analysis.



TEXT FIGURE 8

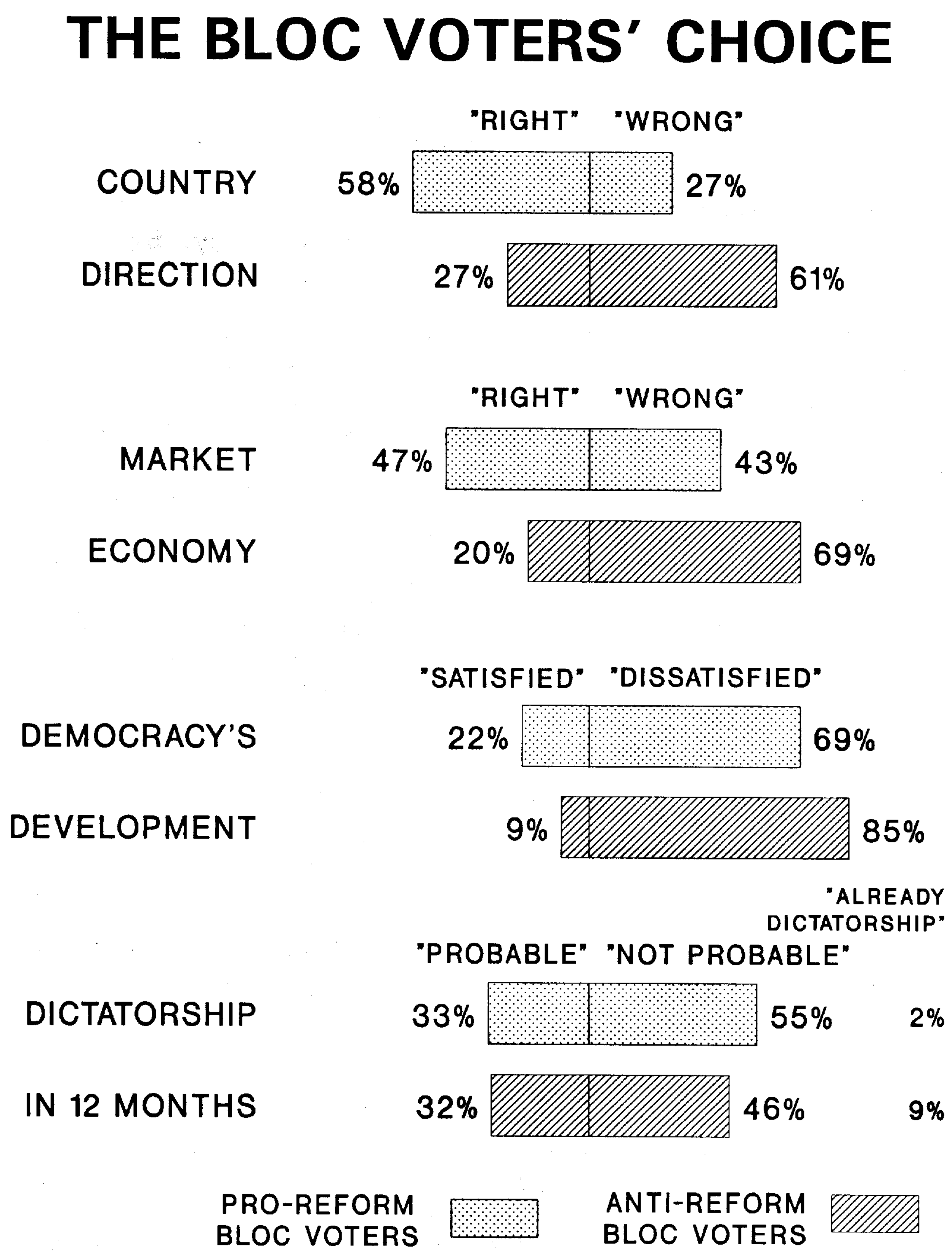
EUROBAROMETER/ROMIR

Those saying that they **personally feel that the creation of a free market economy, that is one largely free from state control, is right for their country's future** were in a majority (42% "right"; 34% "wrong") only in Autumn 1991, just before price liberalisation and the break-up of the former Soviet Union turned Russia and the world upside down. Since then, inflation has helped send the value of people's incomes tumbling and opposition to the market economy has grown steadily. By November 1993, 53% of Russians said the market economy was wrong for their country, while 31% thought otherwise. Only one month later - immediately after Russia's Parliamentary elections - opposition to a market economy grew a further +5 points. **Now those that say the market economy is wrong for their country's future outnumber those who say it is right by exactly two-to-one (58% "wrong"; 29% "right")** (Text Figure 8).

As overall results for Central and Eastern EUROBAROMETER No.4 show, European Russia is by no means a laggard in the Euro-CIS when it comes to its people's views. Despite being largely negative about their own situation and that of their country, they are at least more numerous in being positive on most matters than many Armenians, Belarusians and Ukrainians - except in one crucial area - the speed of economic reform and privatisation (Annex Figures 1-7).

Despite more Russians saying economic reform and privatisation are going "too slow" rather than either "about the right speed" or "too fast", those in the latter two camps combined outnumber those who want to go faster. Only three in ten in fact say economic reforms (30%) and privatisation (29%) are going too slowly, the former result down from well over half (58%) in Autumn 1991 and almost four out of ten (38%) in Autumn 1992. 19% say spontaneously that there are no economic reforms taking place.

Overall, the Parliamentary elections seem to have polarised European Russia further. Asked whether they **feel things in their the country are going in the right or wrong direction,** 31% said it was going in the right direction and 47% in the wrong direction, just before Russia's elections. Now, opposing viewpoints have diverged further (-9 "don't know"), with an increase in both those saying their country's direction is right (+4) and those saying it is wrong (+5). After the elections, 36% say the country is going in the right direction and 50% that it is not.



TEXT FIGURE 9

EUROBAROMETER/ROMIR

Looking at it another way, there has been a gradual increase taking place in the percentage of people who say Russia is going in the right direction, from 26% in Autumn 1992 to 36% in December 1993. The differing trends shown for those saying their country's direction is right and for those who support the market economy tend to suggest that evaluation of Russia's direction has as much to do with political as purely economic reform-related issues.

If an analysis is made of the results between those who say they voted for pro-reform blocs (n=203) and those who say they voted for anti-reform blocs[15] (n=208), this picture becomes clearer. Pro-reform bloc voters say by two-to-one that they feel things in Russia are going in the right direction while anti-reform bloc voters say by an even wider margin that they are not. Nevertheless, looking at their views related to the market economy, even if anti-reform bloc voters are over three-to-one against the market economy, pro-reform voters are virtually split on the issue. Thus although pro-reform voters are much more likely to support the market economy then anti-reform bloc voters, there is still much more to their support for pro-reform bloc views than just the market economy (Text Figure 9).

3.2 Democracy and dictatorship

Disillusionment with the development of democracy also marginally increased (+4 "dissatisfied") in European Russia just after the 12th December Parliamentary elections. Just before, the level of dissatisfaction was around five-to-one. Now, six-to-one are dissatisfied rather than satisfied with the way Russia's democracy is developing (13% "satisfied"; 75% "dissatisfied").

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[15] As defined in chapter 3, paragraph 2 for the pro-reform blocs. The anti-reform bloc voters analysed are LDP and Communists Party self-declared voters *combined*, weighted by size of declared vote. The data used for this analysis are exceptionally not weighted by age, education and region.

This is particularly notable as the election coincided with a plebiscite on a new constitution. 54.8% of Russia's 106 million eligible voters took part in it, of which 58.4% voted for the draft. Thus the constitution has the approval of around 32% of eligible voters. Yet still only 13% of Russians West of the Urals express satisfaction with their democracy's development (as compared to 75% who do not), two and a half times less than the percentage of those in the whole of Russia who approved the draft constitution, the document on which their country's future democracy is to be based.

87% of those who say they backed pro-reform bloc candidates say they also voted for the draft constitution; only 10% had voted against. However, anti-reform voters split; 46% voted for the draft and 44% against. Strong presidential powers contained in the draft may have attracted many anti-reformers to vote for the new constitution.

Even before the elections themselves, there did not seem to be any particular mood of euphoria at the prospect of political change by the democratic process. Just after the dramatic events of 3rd-4th October 1993, when civil war was only narrowly averted in Russia and the old Parliament ejected, satisfaction at the prospect of greater democracy seemed to only marginally budge the highly negative results registered by Central and Eastern EUROBAROMETER survey No.4 (Autumn 1993) compared to one year earlier (+5 "satisfied"; -5 "dissatisfied").

People were also asked about the **likelihood of a dictatorship existing in their country "within the next 12 months"**. Remarkably, despite all the events and changes in Russia over the past year - including the elections - the results are virtually the same as a year before. A relative majority feel dictatorship is unlikely (44%), roughly the same (+2) as before, while a sizeable minority say they feel a dictatorship is likely (33%), no different from last time. The small minority that say spontaneously that dictatorship already exists in Russia (5%) stays (+2) largely the same.

Anti-reform bloc voters are more likely to be dissatisfied with the development of Russia's democracy than pro-reform bloc voters. Nevertheless disillusionment is sufficiently widespread for pro-reform bloc voters to be still more than three-to-one dissatisfied. Pro-reform bloc voters are more likely to dismiss the possibility of a dictatorship within the year than the anti-reformers, while four out of ten anti-reformers say either a dictatorship is probable or that it already exists (Text Figure 9).

ANNEXES

GRAPHICS OF FULL RESULTS

NOTES ON ANNEX FIGURES

* All numbers portrayed in the graphics are percentages.

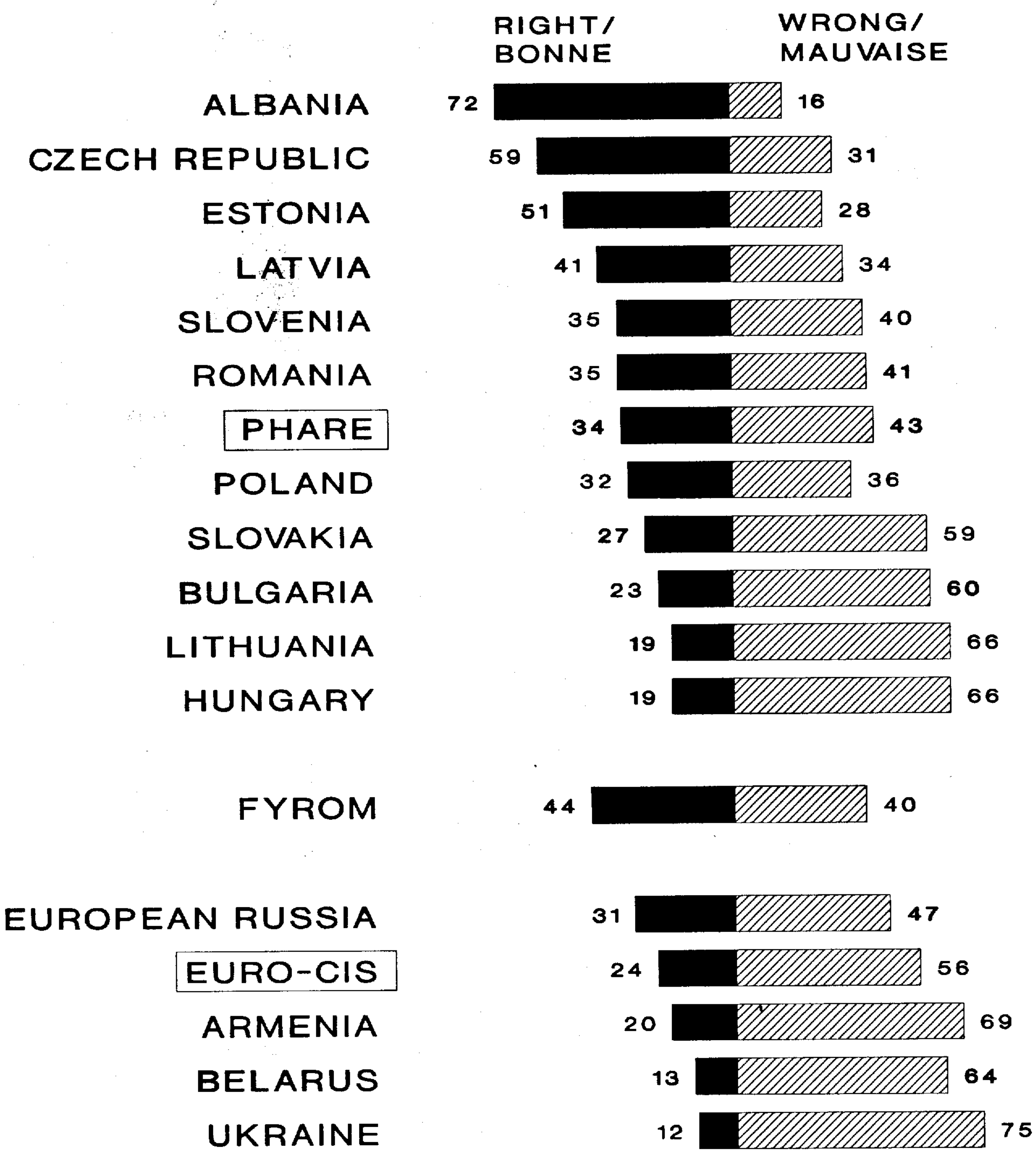
* Respondents who gave no answer to a question or who answered "don't know" are not shown.

* Where more than one positive or negative answer is possible, the responses are often combined.

* Totals for PHARE aid recipient countries and the Euro-CIS (the European part of the Commonwealth of Independent States surveyed this year) are weighted by the population size of each country associated with it.

* The Former Yugoslav Republic of Macedonia is shortened to its acronym FYROM. It is shown separately because it is not currently a recipient of PHARE assistance, nor obviously a part of the Commonwealth of Independent States.

DIRECTION OF COUNTRY - RIGHT OR WRONG ?/ EVOLUTION DU PAYS - BONNE OU MAUVAISE VOIE

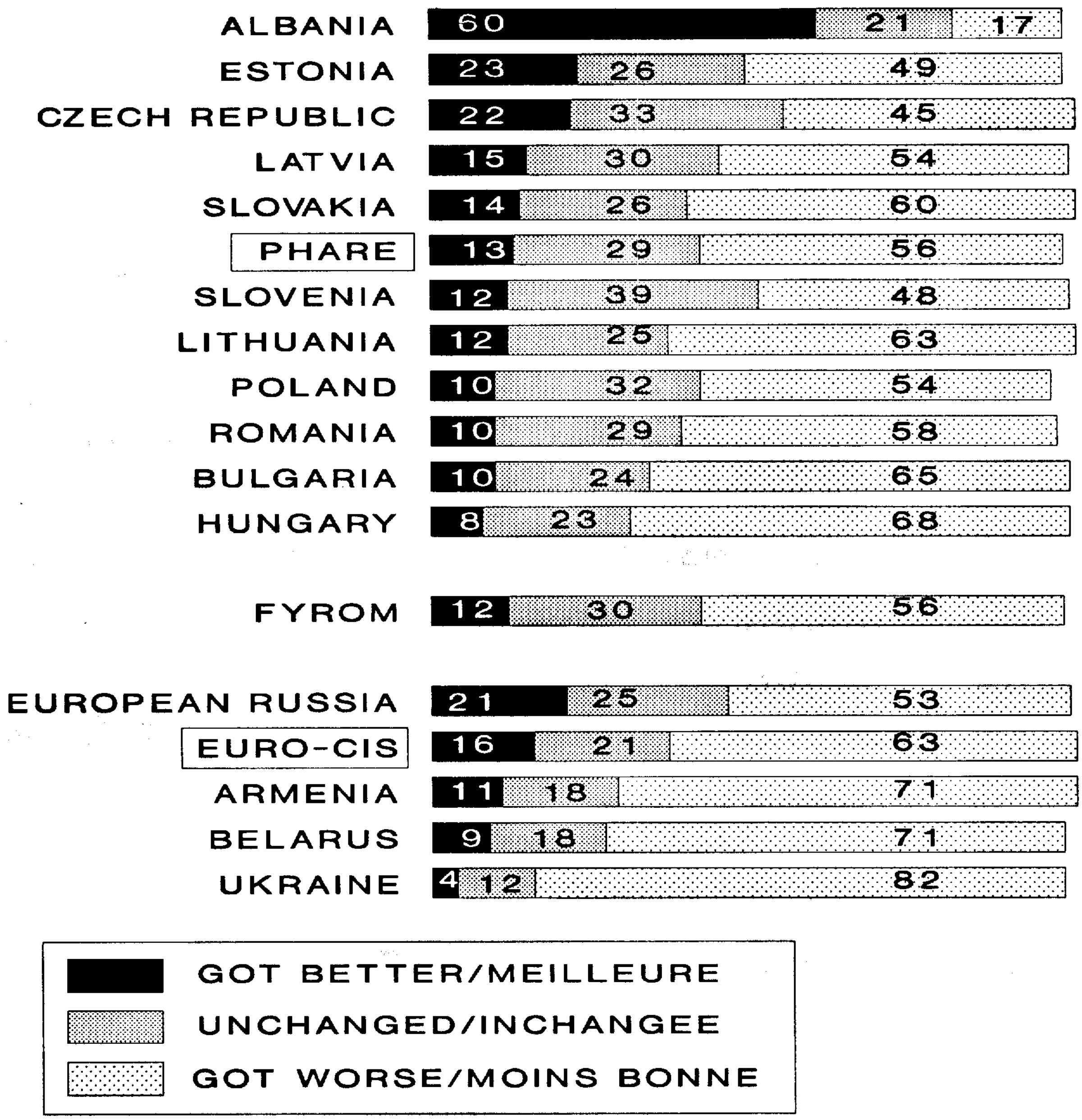


Q. IN GENERAL, DO YOU FEEL THINGS IN (OUR COUNTRY) ARE GOING IN THE RIGHT OR IN THE WRONG DIRECTION ?/

EN GENERAL, ESTIMEZ-VOUS QUE LA SITUATION DANS (NOTRE PAYS) EVOLUE DANS UNE BONNE OU DANS UNE MAUVAISE VOIE ?

ANNEX FIGURE 1 **EUROBAROMETER/GALLUP**

HOUSEHOLD FINANCES - PAST 12 MONTHS/ FINANCES DU MENAGE - LES 12 DERNIERS MOIS



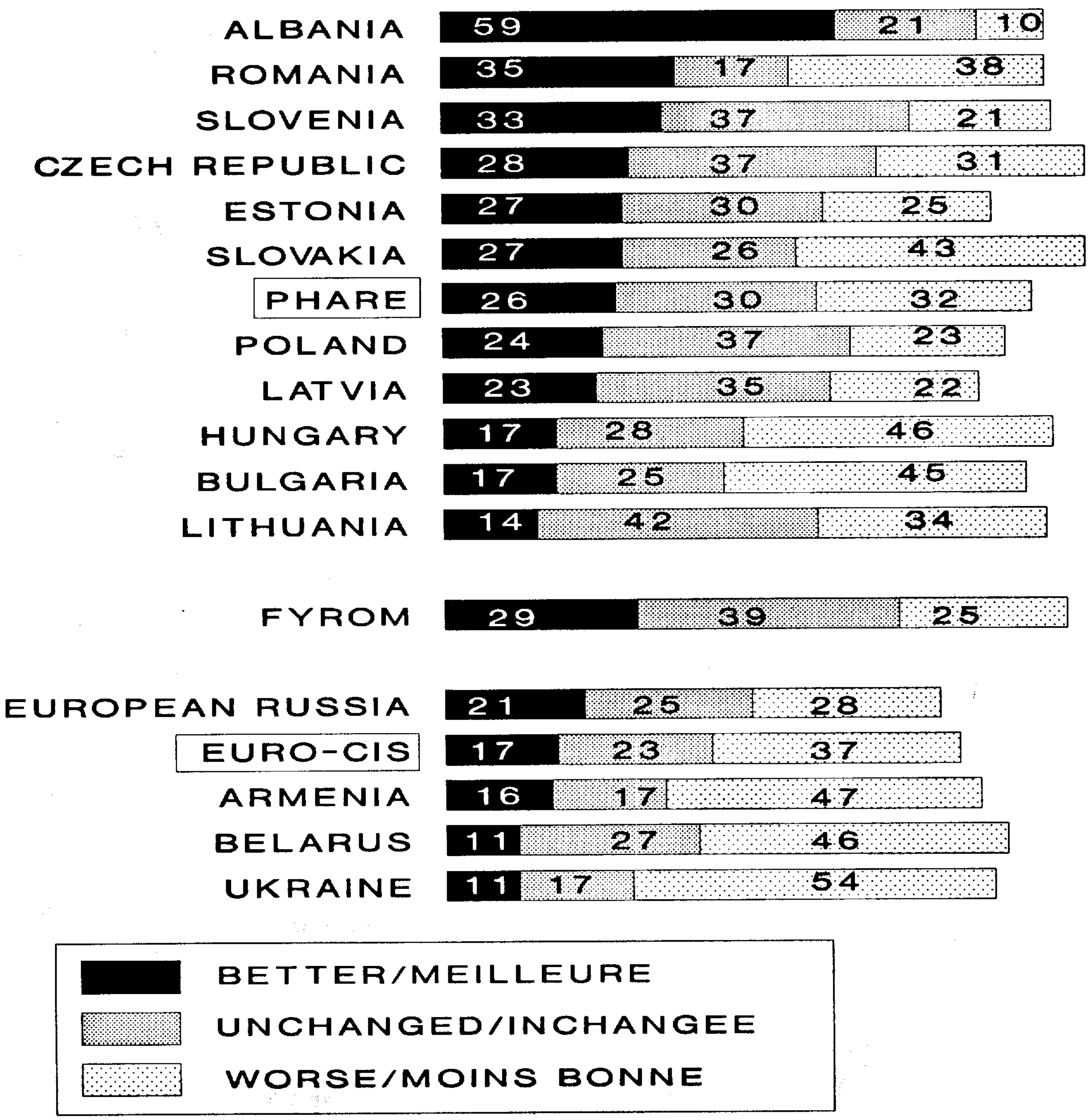
Q. COMPARED TO 12 MONTHS AGO, DO YOU THINK THAT THE FINANCIAL SITUATION OF YOUR HOUSEHOLD HAS GOT A LOT BETTER, GOT A LITTLE BETTER, STAYED THE SAME, GOT A LITTLE WORSE OR GOT A LOT WORSE ?/

PAR RAPPORT A CE QU'ELLE ETAIT IL Y A 12 MOIS, PENSEZ-VOUS QUE LA SITUATION FINANCIERE DE VOTRE MENAGE EST ACTUELLEMENT BIEN MEILLEURE, UN PEU MEILLEURE, INCHANGEE, UN PEU MOINS BONNE OU BIEN MOINS BONNE ?

ANNEX FIGURE 2

EUROBAROMETER/GALLUP

HOUSEHOLD FINANCES - NEXT 12 MONTHS
FINANCES DU MENAGE - LES 12 PROCHAINS MOIS

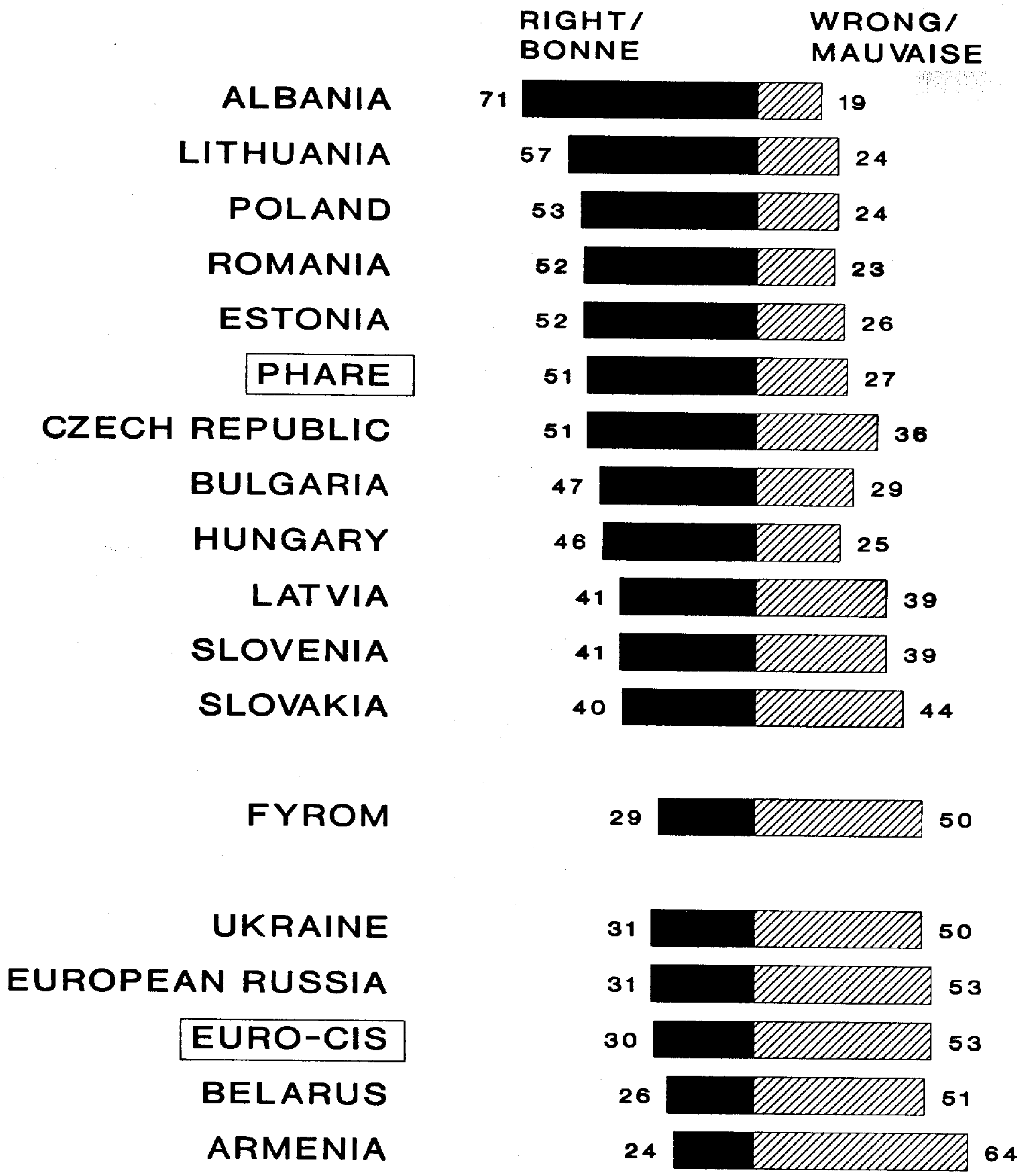


Q. AND OVER THE NEXT 12 MONTHS, DO YOU EXPECT THE FINANCIAL SITUATION OF YOUR HOUSEHOLD WILL GET A LOT BETTER, GET A LITTLE BETTER, STAY THE SAME, GET A LITTLE WORSE OR GET A LOT WORSE ?/

ET DANS LES 12 PROCHAINS MOIS, PENSEZ-VOUS QUE LA SITUATION FINANCIERE DE VOTRE MENAGE SERA BIEN MEILLEURE, UN PEU MEILLEURE, INCHANGEE, UN PEU MOINS BONNE OU BIEN MOINS BONNE ?

ANNEX FIGURE 3 **EUROBAROMETER/GALLUP**

MARKET ECONOMY - RIGHT OR WRONG ?/ ECONOMIE DE MARCHE - BONNE OU MAUVAISE ?



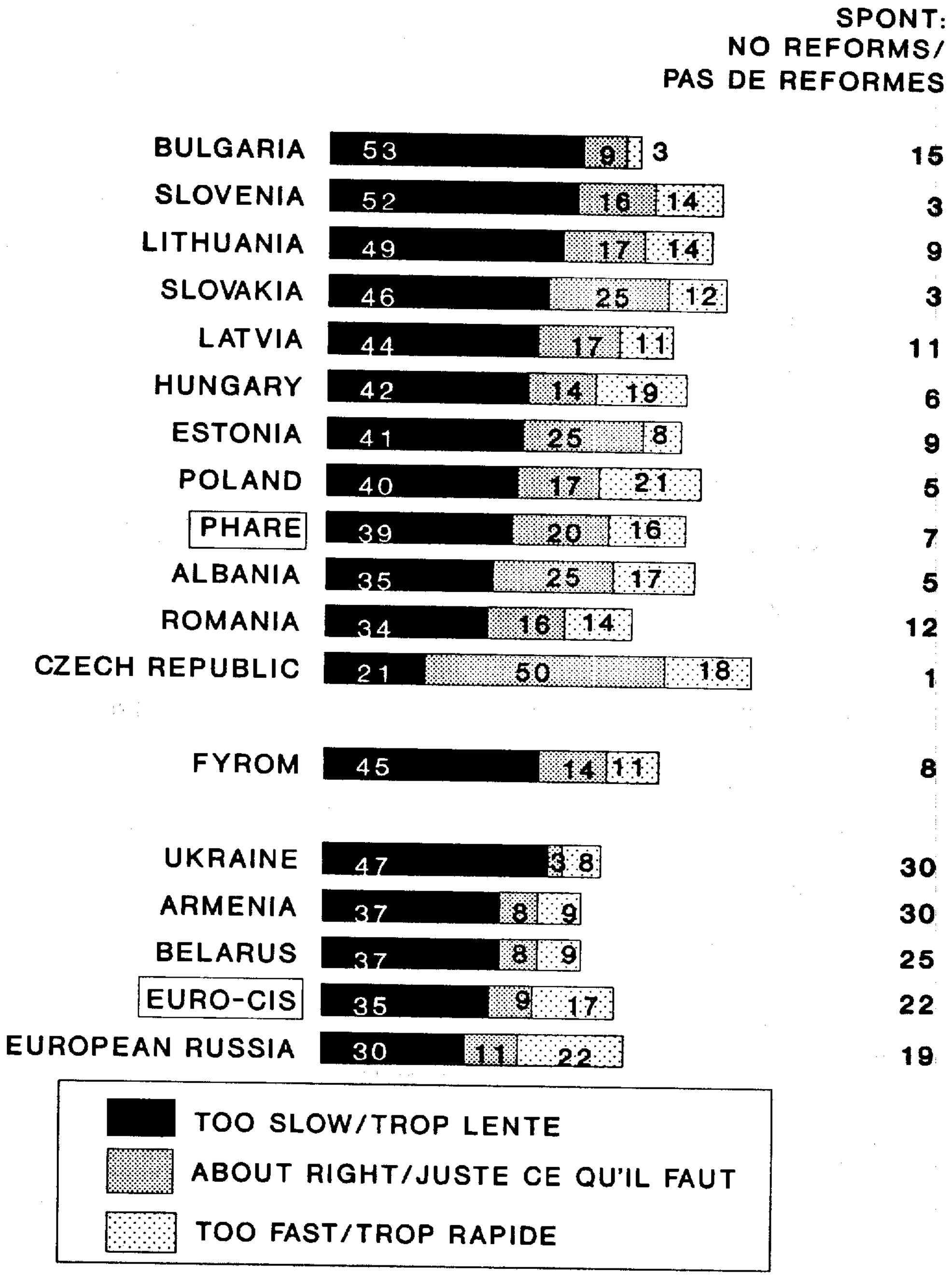
Q. DO YOU PERSONALLY FEEL THAT THE CREATION OF A FREE MARKET ECONOMY, THAT IS ONE LARGELY FREE FROM STATE CONTROL, IS RIGHT OR WRONG FOR (OUR COUNTRY'S) FUTURE ?/

PERSONELLEMENT, PENSEZ VOUS QUE LA CREATION D'UNE ECONOMIE DE MARCHE, C'EST-A-DIRE TRES PEU CONTROLE PAR L'ETAT, SOIT UNE BONNE OU UNE MAUVAISE CHOSE POUR L'AVENIR DE (NOTRE PAYS) ?

ANNEX FIGURE 4

EUROBAROMETER/GALLUP

ECONOMIC REFORMS - TOO FAST OR TOO SLOW ?/
REFORMES ECONOMIQUES - TROP RAPIDES OU TROP LENTES ?



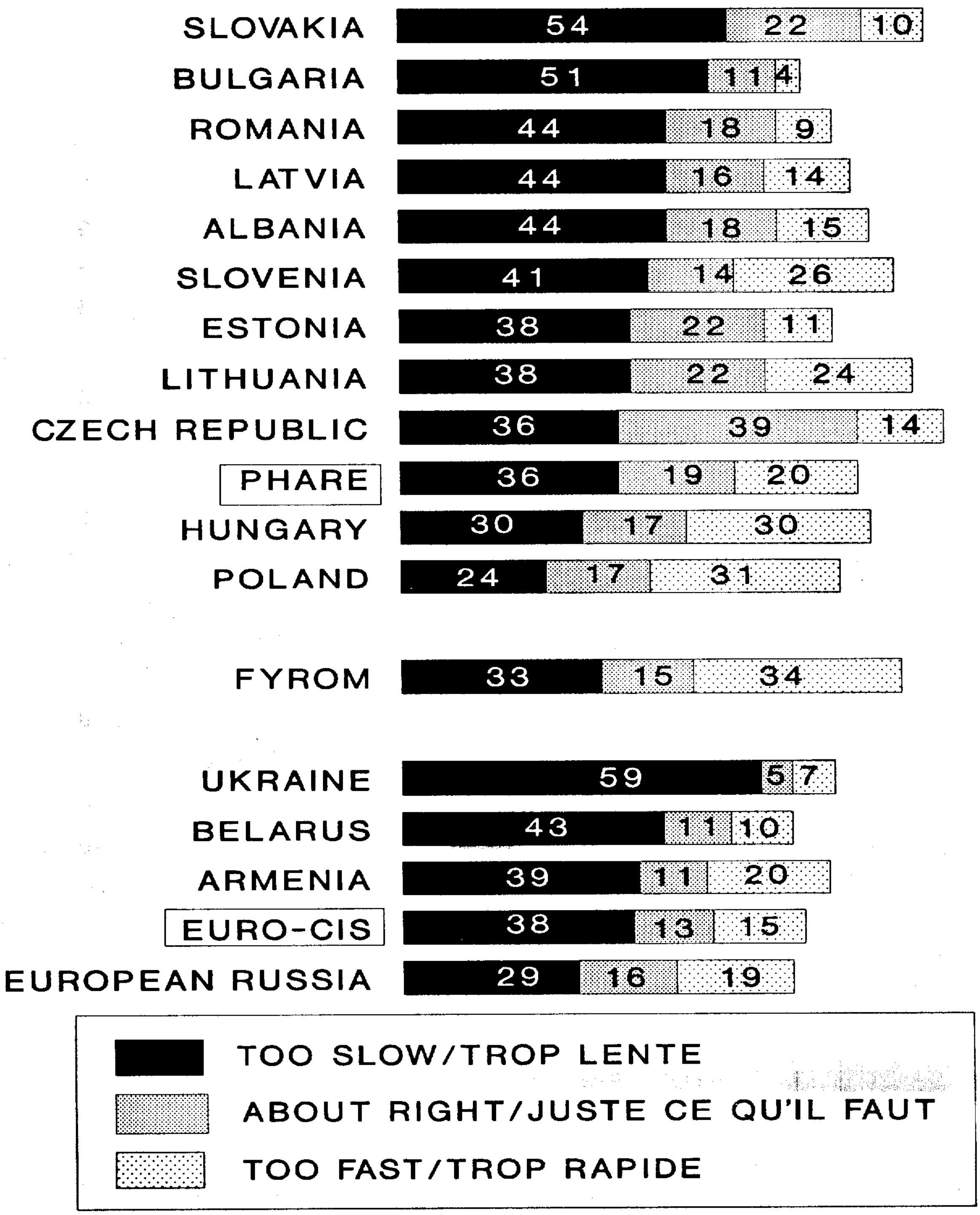
Q. THE WAY THINGS ARE GOING, DO YOU FEEL THAT (OUR COUNTRY'S) ECONOMIC REFORMS ARE GOING TOO FAST, TOO SLOW OR ABOUT THE RIGHT SPEED ?/

ETANT DONNE L'EVOLUTION ACTUELLE, ESTIMEZ-VOUS QUE LES REFORMES ECONOMIQUES (DANS NOTRE PAYS) PROGRESSENT TROP RAPIDEMENT, TROP LENTEMENT OU COMME IL CONVIENT ?

ANNEX FIGURE 5

EUROBAROMETER/GALLUP

PRIVATISATION - TOO FAST OR TOO SLOW ?/ PRIVATISATION - TROP RAPIDE OU TROP LENTE ?

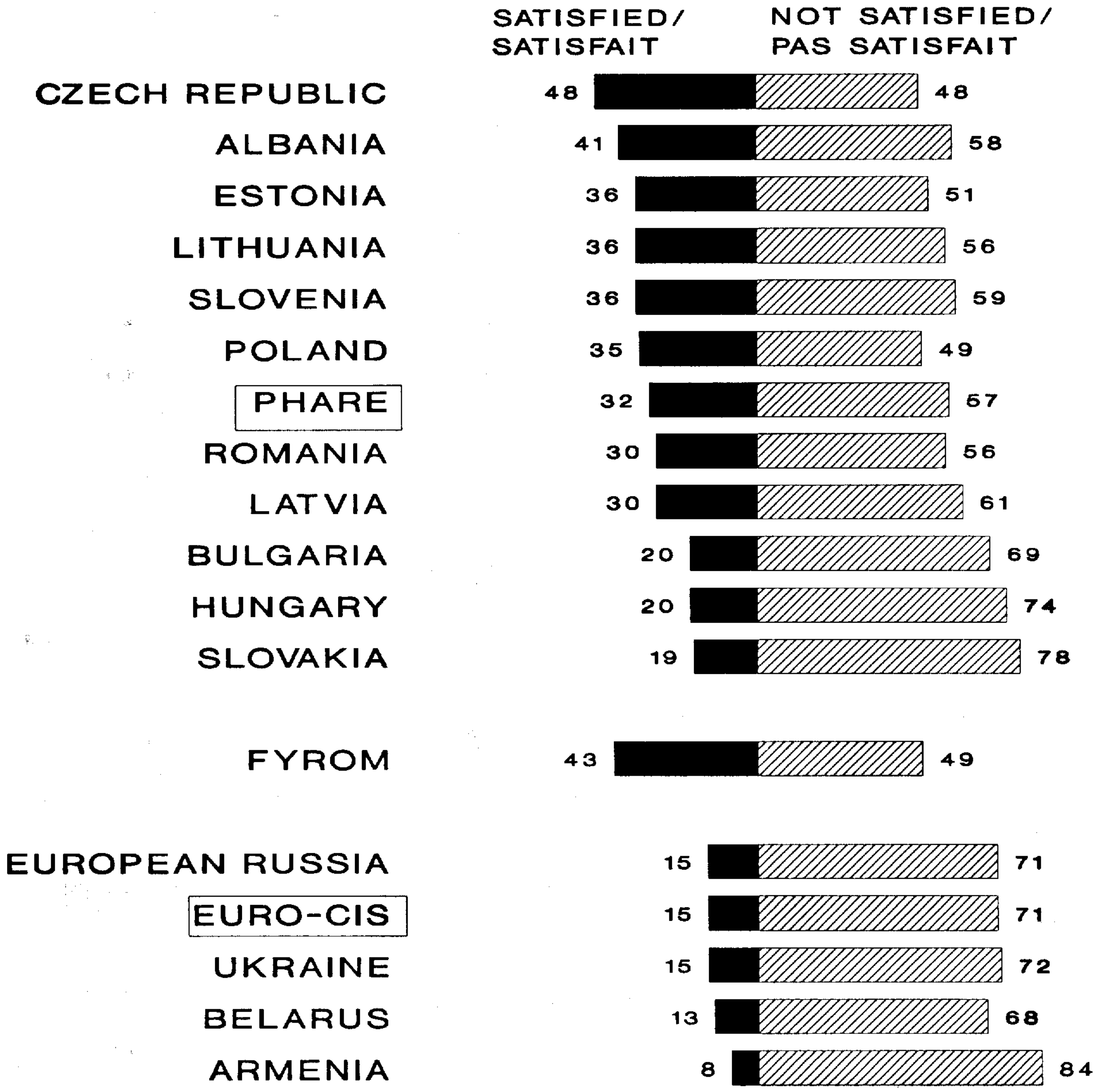


Q. DO YOU THINK THE PROCESS OF PRIVATISING (OUR COUNTRY'S) STATE ENTERPRISES IS GOING TOO FAST, TOO SLOW OR ABOUT THE RIGHT SPEED ?/

PENSEZ-VOUS QUE LE PROCESSUS DE PRIVATISATION DES ENTREPRISES PUBLIQUES (DE NOTRE PAYS) PROGRESSE TROP RAPIDEMENT, TROP LENTEMENT OU COMME IL CONVIENT ?

ANNEX FIGURE 6 **EUROBAROMETER/GALLUP**

SATISFACTION WITH DEVELOPMENT OF DEMOCRACY/ SATISFACTION AVEC LA DEMOCRATISATION

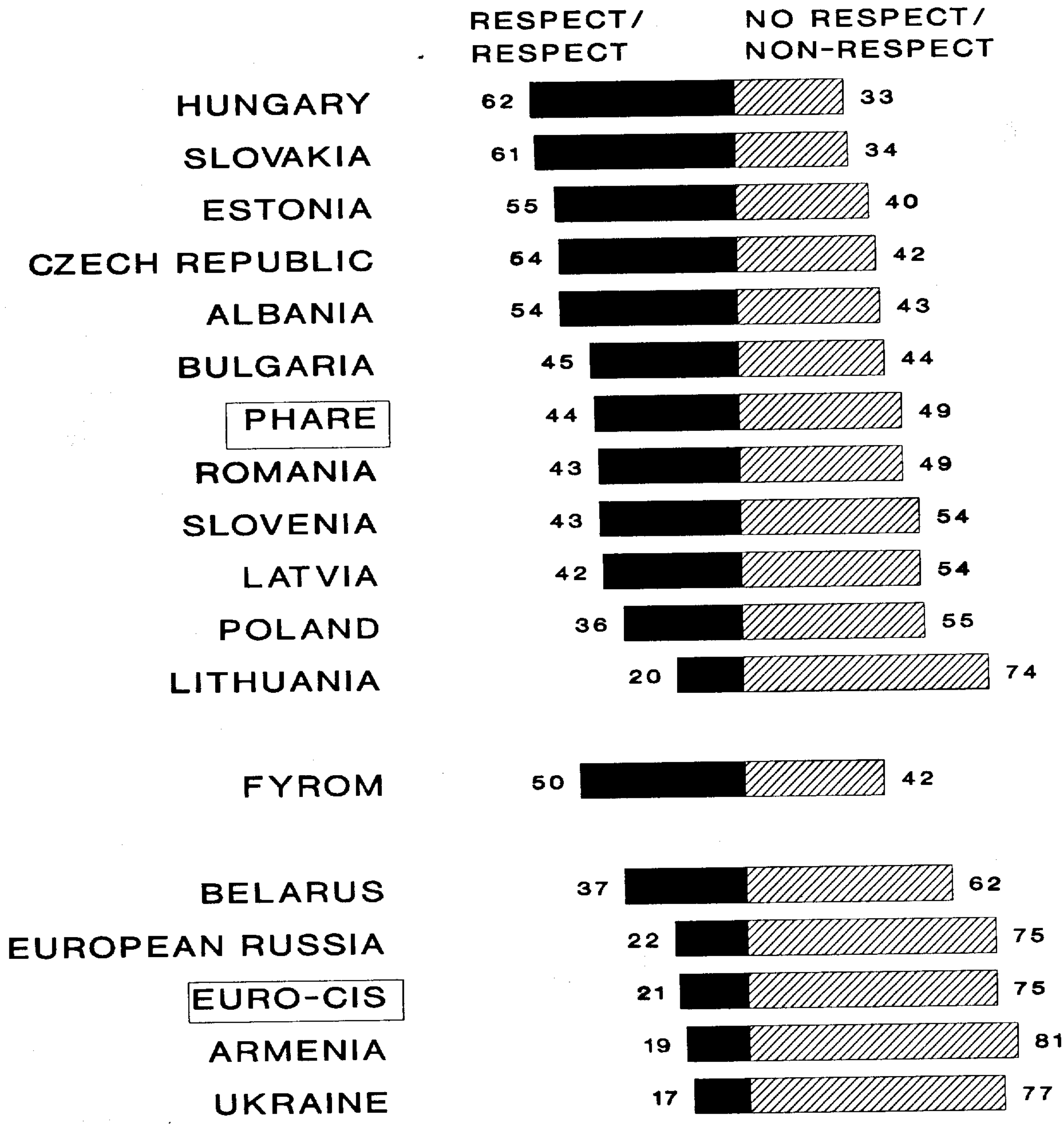


Q. ON THE WHOLE, ARE YOU VERY SATISFIED, FAIRLY SATISFIED, NOT VERY SATISFIED OR NOT AT ALL SATISFIED WITH THE WAY DEMOCRACY IS DEVELOPING IN (OUR COUNTRY) ?/

DANS L'ENSEMBLE, ETES-VOUS TRES SATISFAIT, PLUTOT SATISFAIT, PLUTOT PAS SATISFAIT OU PAS DU TOUT SATISFAIT DE LA FACON DONT LA DEMOCRATIE S'INSTALLE DANS (NOTRE PAYS) ?

ANNEX FIGURE 7 **EUROBAROMETER/GALLUP**

RESPECT FOR HUMAN RIGHTS
RESPECT DES DROITS DE L'HOMME



Q. HOW MUCH RESPECT IS THERE FOR INDIVIDUAL HUMAN RIGHTS NOWADAYS IN (OUR COUNTRY) ? DO YOU FEEL THERE IS A LOT OF RESPECT FOR INDIVIDUAL HUMAN RIGHTS, SOME RESPECT, NOT MUCH RESPECT OR NO RESPECT AT ALL?/

COMMENT RESPECTE-T-ON LES DROITS DE L'HOMME ACTUELLEMENT (DANS NOTRE PAYS) ? ESTIMEZ-VOUS QU'IL Y A BEAUCOUP DE RESPECT POUR LES DROITS DE L'HOMME, UN PEU DE RESPECT, PAS BEAUCOUP DE RESPECT OU PAS DE RESPECT DU TOUT ?

ANNEX FIGURE 8

EUROBAROMETER/GALLUP

WHERE DOES OUR COUNTRY'S FUTURE LIE ?/
OU SE SITUE L'AVENIR DE NOTRE PAYS ?

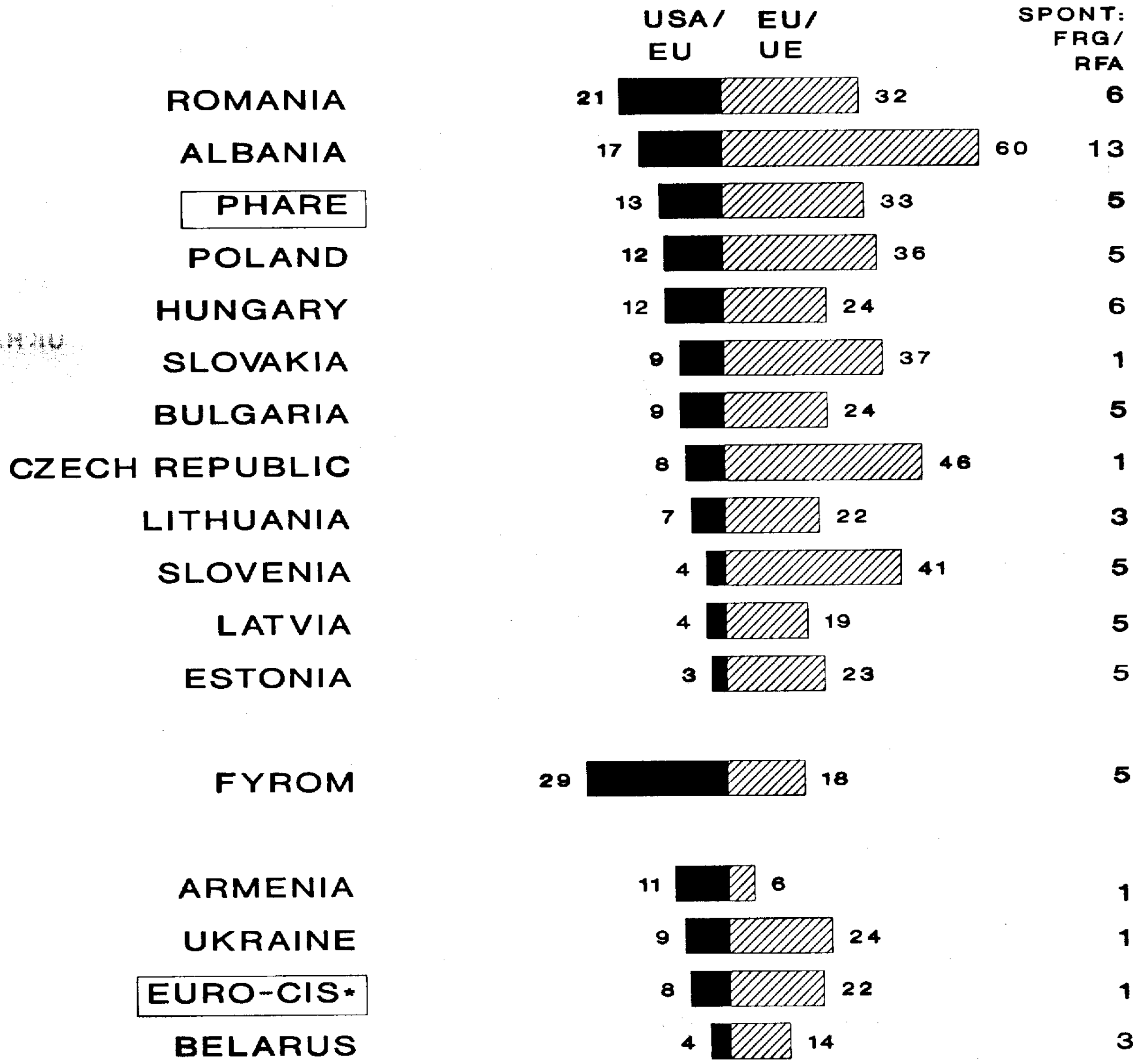
	EUROPEAN RUSSIA RESULT	RESULT FOR REST	TOP RESULT IN:-
EUROPEAN UNION	13	29	ALBANIA, CZECH R., SLOVENIA, SLOVAKIA, POLAND, ROMANIA
RUSSIA		22	ARMENIA, BELARUS, UKRAINE
OTHER CIS	21		
USA	26	11	
OTHER "WESTERN" EUROPEAN STATES	5	9	ESTONIA
OTHER EASTERN EUROPEAN STATES	2	6	
NONE OF THESE	2	1	
DEPEND ON OURSELVES	9	4	
GERMANY	2	3	
JAPAN/SOUTH KOREA	3	2	
TURKEY	1	1	

NB: NO SINGLE RESPONSE HIGHER THAN 30% IN / AUCUNE REPONSE SUPERIEURE A 30% EN BULGARIA (EU:24%), HUNGARY (EU:24%),LATVIA ("OTHER WESTERN"/RUSSIA:BOTH 27%), LITHUANIA (RUSSIA:29%), FYROM (USA:29%),AND EUROPEAN RUSSIA (USA:26%)

ANNEX FIGURE 9

EUROBAROMETER/GALLUP

WHERE DOES OUR COUNTRY'S FUTURE LIE ?/ OU SE SITUE L'AVENIR DE NOTRE PAYS ?



(NB: ONLY ONE ANSWER ALLOWED / UNE SEULE REPONSE PERMISE)

**EUROPEAN RUSSIA EXCLUDED / RUSSIE EUROPEENE EXCLUE*

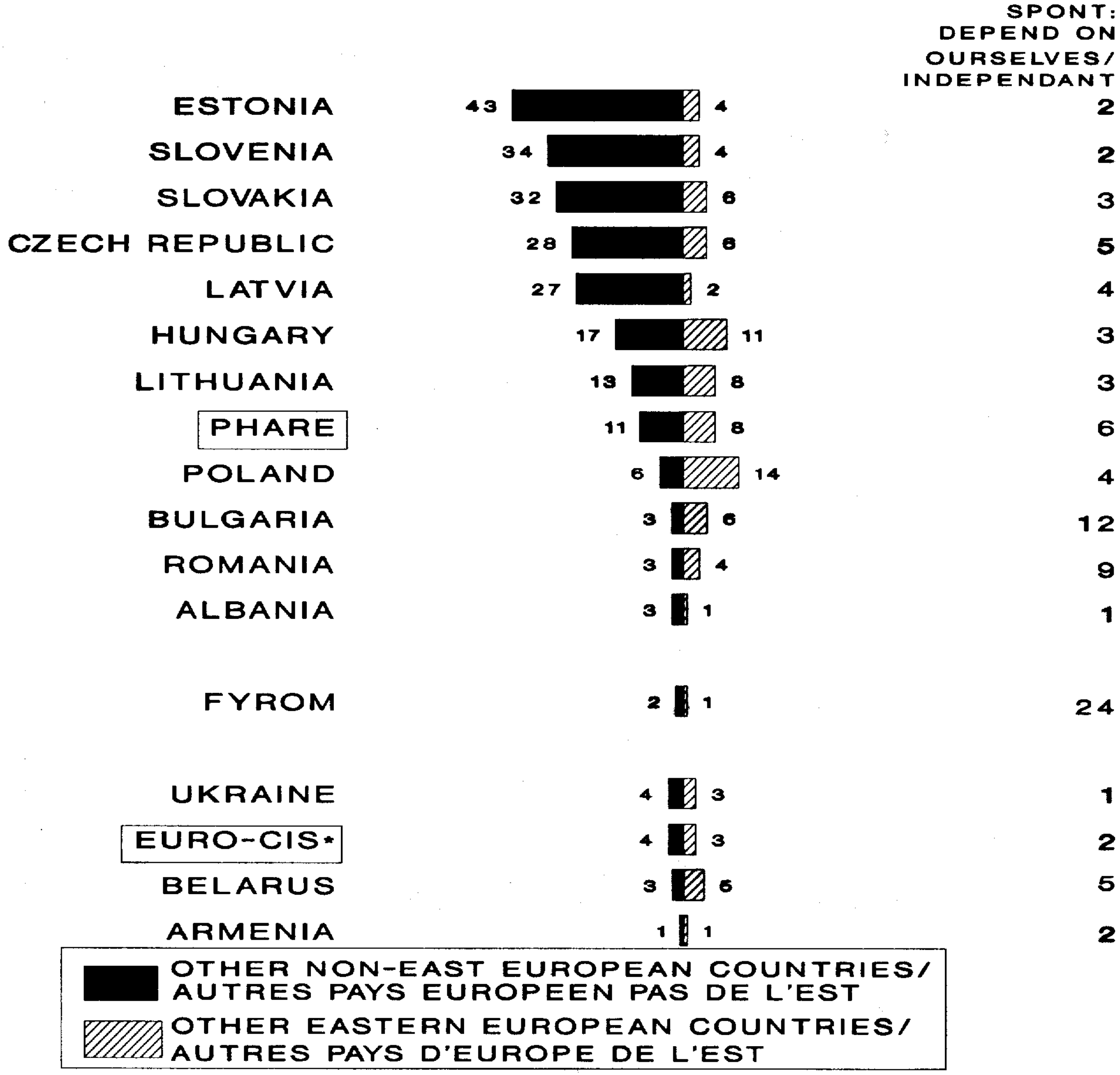
Q. AS THINGS NOW STAND, WITH WHICH OF THE FOLLOWING DO YOU SEE (OUR COUNTRY'S) FUTURE MOST CLOSELY TIED UP ? ... THE UNITED STATES, THE EUROPEAN COMMUNITY (SPONTANEOUS: GERMANY)/

DANS LA SITUATION ACTUELLE, AVEC LEQUEL DES (GROUPES DE) PAYS SUIVANTS PENSEZ-VOUS QUE LE FUTUR (DE NOTRE PAYS) SOIT LE PLUS ETROITEMENT LIE ? ... LES ETATS-UNIS, LA COMMUNAUTE EUROPEENNE (SPONT.: ALLEMAGNE)

ANNEX FIGURE 10

EUROBAROMETER/GALLUP

WHERE DOES OUR COUNTRY'S FUTURE LIE ?/ OU SE SITUE L'AVENIR DE NOTRE PAYS ?



(NB: ONLY ONE ANSWER ALLOWED / UNE SEULE REPONSE PERMISE)

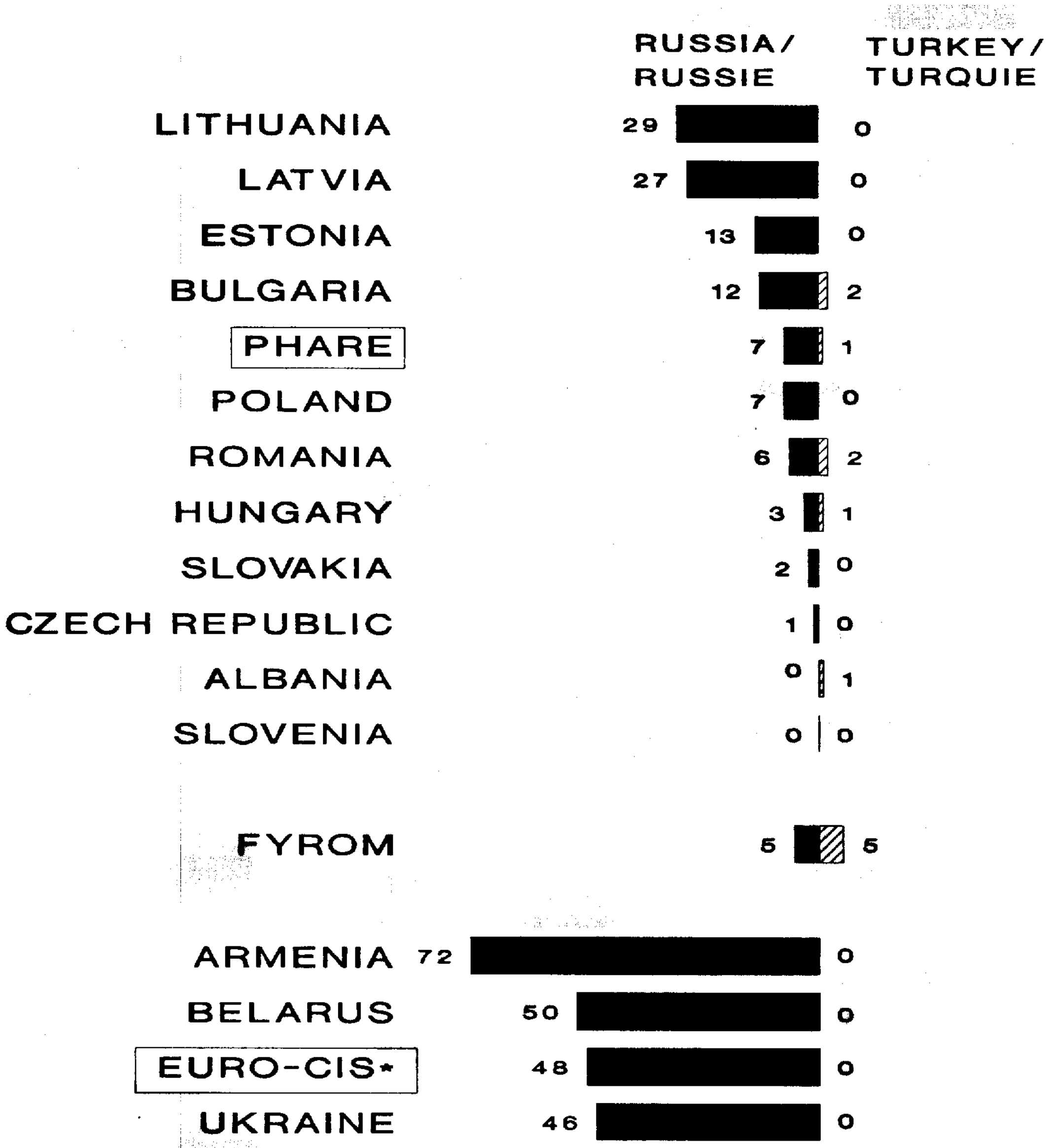
**EUROPEAN RUSSIA EXCLUDED / RUSSIE EUROPEENE EXCLUE*

Q. AS THINGS NOW STAND, WITH WHICH OF THE FOLLOWING DO YOU SEE (OUR COUNTRY'S) FUTURE MOST CLOSELY TIED UP ?
... OTHER EUROPEAN COUNTRIES LIKE AUSTRIA, SWITZERLAND, SWEDEN AND FINLAND; OTHER CENTRAL AND EASTERN EUROPEAN COUNTRIES/

DANS LA SITUATION ACTUELLE, AVEC LEQUEL DES (GROUPES DE) PAYS SUIVANTS PENSEZ-VOUS QUE LE FUTUR (DE NOTRE PAYS) SOIT LE PLUS ETROITEMENT LIE ?
... AUTRES PAYS EUROPEENS TELS L'AUTRICHE, LA SUISSE, LA SUEDE ET LA FINLANDE; AUTRES PAYS D'EUROPE CENTRALE ET DE L'EST

ANNEX FIGURE 11 **EUROBAROMETER/GALLUP**

WHERE DOES OUR COUNTRY'S FUTURE LIE ?/ OU SE SITUE L'AVENIR DE NOTRE PAYS ?



(NB: ONLY ONE ANSWER ALLOWED / UNE SEULE REPONSE PERMISE)

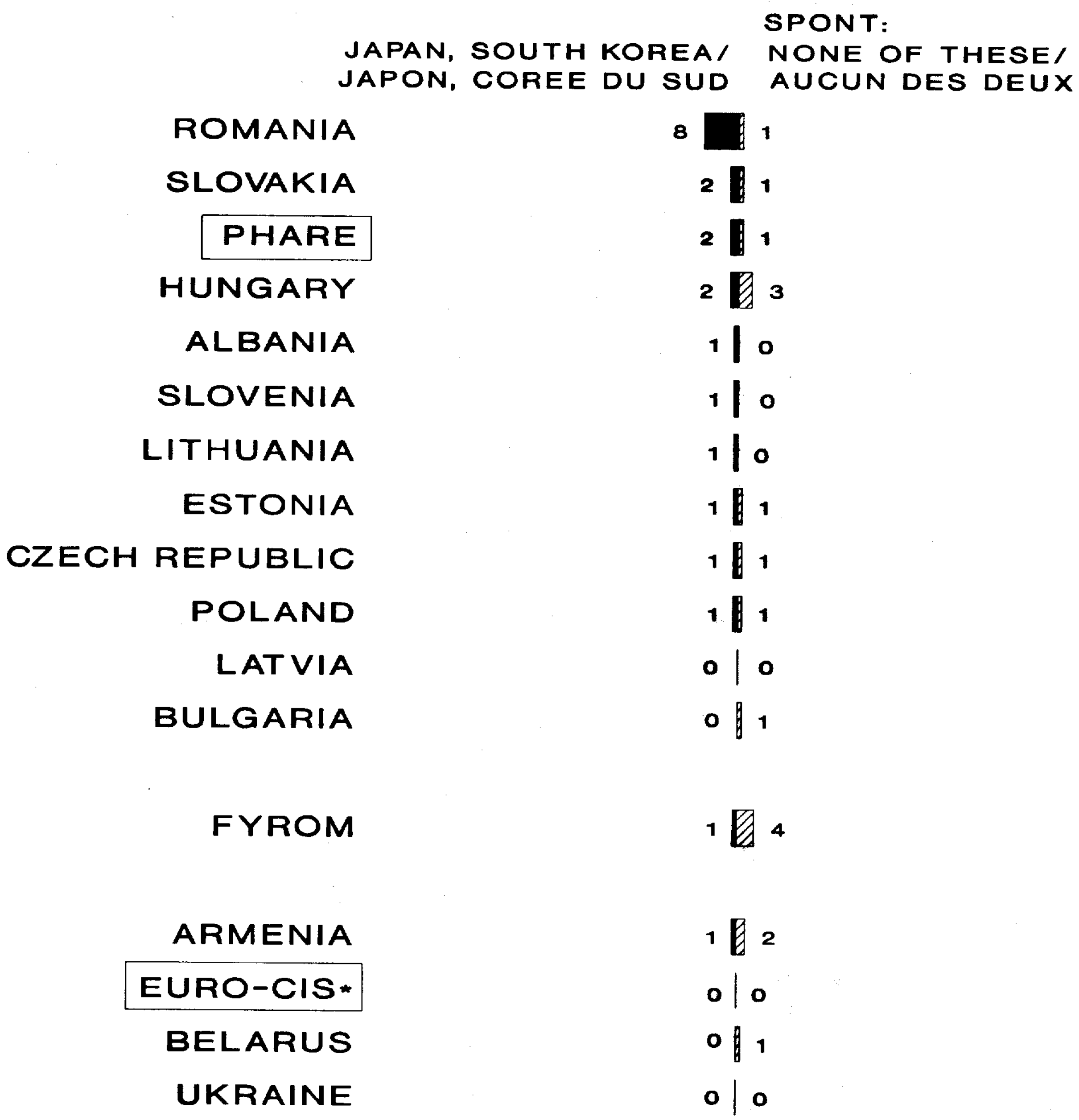
**EUROPEAN RUSSIA EXCLUDED / RUSSIE EUROPEENE EXCLUE*

Q. AS THINGS NOW STAND, WITH WHICH OF THE FOLLOWING DO YOU SEE (OUR COUNTRY'S) FUTURE MOST CLOSELY TIED UP ? ... RUSSIA (FOR RUSSIA: "OTHER COUNTRIES IN THE COMMONWEALTH OF INDEPENDENT STATES"); TURKEY/

DANS LA SITUATION ACTUELLE, AVEC LEQUEL DES (GROUPES DE) PAYS SUIVANTS PENSEZ-VOUS QUE LE FUTUR (DE NOTRE PAYS) SOIT LE PLUS ETROITEMENT LIE ? ... LA RUSSIE (POUR LA RUSSIE: "AUTRES PAYS DE LA COMMUNAUTE DES ETATS INDEPENDANTS); LA TURQUIE

ANNEX FIGURE 12 **EUROBAROMETER/GALLUP**

WHERE DOES OUR COUNTRY'S FUTURE LIE ?/ OU SE SITUE L'AVENIR DE NOTRE PAYS ?



(NB: ONLY ONE ANSWER ALLOWED / UNE SEULE REPONSE PERMISE)

****EUROPEAN RUSSIA EXCLUDED / RUSSIE EUROPEENE EXCLUE***

Q. AS THINGS NOW STAND, WITH WHICH OF THE FOLLOWING DO YOU SEE (OUR COUNTRY'S) FUTURE MOST CLOSELY TIED UP ? ... JAPAN/SOUTH KOREA; (SPONTANEOUS: NONE OF THESE)/

DANS LA SITUATION ACTUELLE, AVEC LEQUEL DES (GROUPES DE) PAYS SUIVANTS PENSEZ-VOUS QUE LE FUTUR (DE NOTRE PAYS) SOIT LE PLUS ETROITEMENT LIE ? ... LE JAPON/LA COREE DU SUD; (SPONT.: AUCUN)

ANNEX FIGURE 13 **EUROBAROMETER/GALLUP**

IMAGE OF EUROPEAN UNION/
IMAGE DE L'UNION EUROPEENNE

Q. AS YOU MIGHT KNOW, 12 STATES OF "WESTERN" EUROPE FORM TOGETHER THE "EUROPEAN COMMUNITY". WOULD YOU SAY THAT YOUR IMPRESSIONS OF THE AIMS AND ACTIVITIES OF THE EUROPEAN COMMUNITY ARE GENERALLY POSITIVE, NEUTRAL OR NEGATIVE ?/

COMME VOUS LE SAVEZ SANS DOUTE, 12 ETATS D'EUROPE OCCIDENTALE FORMENT LA "COMMUNAUTE EUROPEENNE". DIRIEZ-VOUS QUE VOS IMPRESSIONS QUANT AUX BUTS ET ACTIVITES DE LA COMMUNAUTE EUROPEENNE SONT EN GENERAL POSITIVES, NEUTRES OU NEGATIVES ?

ANNEX FIGURE 14 **EUROBAROMETER/GALLUP**

ANNEXES

HOW THE POLL WAS DONE

COORDINATION AND DETAILS OF PARTICIPATING INSTITUTES

Overall Co-ordination: DGX.B-SRA (EUROBAROMETER)
Statistical Data Processing: GALLUP UK
Regional coordination: ROMIR for Belarus, European Russia and Armenia
BBSS for Albania, Bulgaria, FYROM, Romania and Ukraine
AISA undertook fieldwork in Czech Republic and Slovakia

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TECHNICAL SPECIFICATIONS - INTRODUCTION

Between 1st November and 5th December 1993 the institutes listed above conducted the fourth wave of the Central and Eastern EUROBAROMETER with the help of the **European Commission**, Directorate General X for Information, Communication, Culture, Audiovisual, "Surveys, Research, Analyses, (EUROBAROMETER)" Unit. All requests for further information should be addressed to either Mr. Karlheinz REIF or Mr George CUNNINGHAM, EUROBAROMETER, (T120 - 1/107), European Commission, B-1049 Brussels. Tel. 32-2-299.94.41, Fax. 32-2-299.92.05.

All EUROBAROMETER data are stored at the Zentral Archiv (Universität Köln, Bachemer Strasse 40, D-5000 Köln 41). They are at the disposal of all institutes which are members of the European Consortium for Political Research, of the Inter-University Consortium for Political and Social Research (Michigan) and all those interested in social science research.

DETAILS ON SAMPLING

A total of 16 countries in Central and Eastern Europe were surveyed: Albania, Armenia, Belarus, Bulgaria, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, the Former Yugoslav Republic of Macedonia (FYROM), Poland, Romania, European Russia, Slovakia, Slovenia and Ukraine. In total 16,716 citizens aged 15 years and over were interviewed face-to-face in their private residences in Central and Eastern Europe as a whole. The survey was fully nationally-representative.

As with Central and Eastern EUROBAROMETER No. 2 and No. 3, each institute adopted a multi-stage random probability sample design. There were slight variations in each country's sample design to take account of its individual characteristics and population structure. In each of the 16 countries surveyed, interviews were conducted throughout every region within its national boundaries.

SAMPLING POINTS

Albania	150
Armenia	61
Belarus	104
Bulgaria	150
Czech Republic	109
Estonia	165
FYROM	110
Hungary	100
Latvia	101
Lithuania	102
Poland	251
Romania	152
Euro-Russia	89
Slovakia	86
Slovenia	154
Ukraine	119
TOTAL	2003

The sampling points for each country were selected, in the first instance, via a division into its major socio-economic areas. A list of these is appended. Within each of these areas smaller electoral or administrative districts were randomly selected and, taking into account such factors as the relative size of the population living in rural and urban settlements, the number and distribution of sampling points in each of these districts was finalised.

In general ten interviews were conducted around each sampling point, with individuals being selected via one of three main methods, these being:-

i) Contact randomly selected from a list of the electorate. In most cases such lists were no more than three years old.

ii) Random selection of addresses from published, or specially commissioned lists, with individuals being selected via a Kish matrix or other random method.

iii) Random route from a selected starting point (often the central bus station in larger settlements) with individuals again being selected via a Kish matrix or other random method.

Quite understandably, in many instances address or electoral data was not available for the population below the age of enfranchisement, and therefore quotas were imposed to ensure that the correct number of 15-17 year olds were interviewed.

The maximum number of interviews in any individual household was one. All interviews were conducted face-to-face by fully-trained interviewers in people's homes.

In each country the final sample was representative of the adult population aged 15+ years.

REALISATION OF FIELDWORK

	FIELDWORK	NUMBER OF RESPONDENTS
Albania	25 November - 5 December	1054
Armenia	2 November - 25 November	1000
Belarus	6 November - 27 November	1143
Bulgaria	5 November - 13 November	1198
Czech Republic	4 November - 23 November	817
Estonia	4 November - 11 November	1011
FYROM	15 November - 23 November (MACEDONIA)	1097
Hungary	5 November - 14 November	972
Latvia	17 November - 27 November	992
Lithuania	10 November - 17 November	1020
Poland	13 November - 18 November	1004
Romania	13 November - 25 November	1176
European Russia	1 November - 14 November	1377
Slovakia	5 November - 18 November	684
Slovenia	25 November - 29 November	1000
Ukraine	17 November - 5 December	1171
TOTAL	1st November - 5th December	16,716
EU 12 (Comparison)	13th October - 9th November	13,063

WEIGHTING OF DATA

Where possible, the results for each country were post-weighted by a matrix of highest level of education completed within age, and also according to the regional distribution of the country's adult population. Where information was not available for education within age, the results were weighted by each factor separately, and also by region.

Weighting by an interlocking matrix of age and education was possible in: Armenia, Belarus, Czech Republic, Estonia, Hungary, Lithuania, Poland, European Russia, Slovakia and Slovenia. The overall results for Central and Eastern Europe as a whole were weighted according to each country's 15+ population. The data for each country's population by age, education and region was provided by participating national institutes.

	POPULATION TOTAL(15+yrs) (000s)	PROPORTION OF EAST EUROPE POPULATION
Albania	2,242	1.00
Armenia	2,300	1.02
Belarus	7,815	3.49
Bulgaria	6,800	2.04
Czech Republic	8,138	3.64
Estonia	1,222	0.55
FYROM	1,354	0.61
Hungary	8,374	3.74
Latvia	2,096	0.94
Lithuania	2,842	1.27
Poland	28,239	12.62
Romania	17,738	7.93
European Russia	88,772	39.65
Slovakia	3,960	1.77
Slovenia	1,562	0.70
Ukraine	40,343	18.03
	5	
TOTAL	223,797	100.00%

AREAS COVERED

Albania
Tirana
Northern
Central
Southern

Armenia
Ararat
Sevan
Central
Shirak
Lory
Yerevan
North-Eastern
Vai
Zangezur

Belarus
Brest
Vitebsk
Gomel
Grodno
Minsk (city)
Minsk (district)
Mogiljev

Bulgaria
Varna
Razgrad
Mihailovgrad
Lovetch
Sofia-city
Sofia District
Plovdiv
Bourgas
Haskovo

Czech Republic
Prague
Central Bohemia
Southern Bohemia
Western Bohemia
Northern Bohemia
Eastern Bohemia
Southern Moravia
Northern Moravia

Estonia
North-Western
North-Eastern
South-Eastern
South-Western
Western

FYROM
Skopski, Povardarski
Pelagoniski
Ohrid
Polostaski
Bregalnicki
Kumanovski

Hungary
Central
Northern Hungary
Northern Great Plain
Southern Great Plain
Southern Transdanubia
Northern Transdanubia

Latvia
Riga
Vldzeme
Zemgale
Kurzeme
Latgale

Lithuania
Zemaitija
Aukstaitija
Suvalkija
Dzukija
Pietrycui Lietuva

Poland
Central
Eastern
Little Poland' Southern
Silesia
Western Pomerania
Great Poland

Romania
Oltenia
Muntenia
Dobrogea
Moldova
Transilvania
Crisana-Maramures,Banat
Bucuresti

European Russia
Northern
Northern-Western
Central
Volgo-Vjatsky
Central (Black Earth)
Along Volga
North-Caucasian
Urals

Slovakia
Bratislava
Central Slovakia
Eastern Slovakia
West Slovakia

Slovenia
Gorenjska
Primorska
Osrednja Slovenija
Koroska in Savinjska
Dolenjska in Posavje
Stajerska in Prekmurje

Ukraine
Kiev
Northern
Central
North-Eastern
North-Western
Eastern
Western
South Western
South
Krym

GALLUP

Gallup in the UK is a member of the Gallup International Group of companies which has recognized affiliates in 50 countries worldwide, including almost all European Union (EU) and EFTA countries. The British company was formed in 1937 and is the largest independent research organisation in Britain. Throughout the worldwide group, all companies are independently-owned and managed by their working directors. The headquarters of the Membership Association of Gallup International is in London.

Gallup International has had nearly 20 years of close association with the European Commission. Initially, the French affiliate of Gallup International directed by Madame Helen Riffault pioneered the standard EUROBAROMETER survey conducted at least twice a year in all EU countries on behalf of the Commission. This became the basis of the EUROBAROMETER report over the 15 year period 1973-1989. Currently under the direction of Madame Nicole Jamar, EOS Gallup Europe has been responsible for the 'FLASH EUROBAROMETER' framework contract for up to five years since 1990. This involves telephone and face-to-face omnibus surveys in all twelve EU countries.

Gallup in the UK was one of the Western pioneers of research in Eastern Europe and the former Soviet Union, with early surveys in Eastern Europe stretching back to 1972. It conducted the first direct measures of voting intentions, political opinion and media awareness by a western pollster in Hungary, former Czechoslovakia, Lithuania and Bulgaria. Subsequently, most of the companies participating in the Central and Eastern EUROBAROMETER have had a close working relationship with Gallup International and many are either members or candidates for recognition by this body. In 1992 Gallup UK set up a continual television audience measurement survey on behalf of Russian Federation Television, and this research instrument has now been extended to cover Bulgaria.

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