

# Trends, drivers, triggers

## Voices from CEE on the Future of Europe 2024 and beyond

Compiled by Maliek Banat, Visegrad Insight junior fellow

The process of European integration is no longer seen as a depoliticised matter after a ‘decade of crises’ in the region: first the eurozone crisis, the migration crisis and now the pandemic. Voices from a wide range of spectrums have since offered their critique of the EU as a political project — **today’s majority (47%) are in favour of the EU but not in how it has been realised thus far.**

Ripples of anti-Europeanism — fuelled by the mishandling of such crises — have given rise to extreme nationalism and provided political opportunities for populists interested in the short-term and often with no deeper ideological backbone. The consequent deconstruction of EU politics has also given [impetus](#) to the traditionally ‘horizontal’ civil society grassroots movements to mobilise and become more ready for the arena of formal politics.

**Today, 6 in 10 Europeans agree that the coronavirus crisis has made them reflect on the future of Europe**, with ‘health risks’ being the biggest perceived threat in the immediate future. At the same time, the EU’s importance as a crisis management actor — whether through the procurement of vaccines or the injection of stimulus packages — has led to its **highest level of public trust since the spring of 2008.**

Nevertheless, this does not mean the EU’s internal divisiveness on issues like migration, climate change, austerity measures and other policies has disappeared. For example, despite a stronger Frontex border guard agency and beefed up external borders, the EU is now better prepared to combat irregular migration but there remains no widely accepted [consensus](#) on the Afghan refugee policy. Even ostensibly appealing initiatives — such as the banking and energy unions — get nowhere without buy-in from member states.

If the bloc carries on with its usual horse-trading of the *comme d’habitude* intergovernmental response, it is unlikely to reach its ambitious agenda which was set out in the Green Deal or the Digital Compass. Parallel to that, the potential failure of member states to efficiently allocate recovery funds towards a green and digital recovery is likely to reverse current levels of trust in EU institutions.

Political debate in Brussels, meanwhile, is unavoidable as the Union is yet to develop a coherent policy of strategic autonomy and define its place in international relations amidst the rise of China and a contested role of America in the world. After more than a year of the pandemic, **many Europeans feel that they cannot rely on the US, China or Russia and thus have to move towards greater self-reliance.**

The Conference of Europe is a window to reconstruct the narrative of the European Union that embeds a value-based agenda and acts as an alternative to the consensus approach within the EU. **Understanding of how the EU works is at its all-time high**, which is why overwhelming calls for change cannot be underestimated. Last but not least, the mobilisation of civil society will be the deciding [counterforce](#) to populist hijacking of the conference or the false veneer of grassroots activism embodied by ‘friendly NGOs’ of ruling ethnonationalist parties in Europe.

According to Eurobarometer, **90% of Europeans demand that citizens' voices are taken more into account in decisions about the future of Europe**. When asked how the EU should change after COVID-19, **seven out of twelve countries polled by the ECFR said that it needed to develop a unified response to global threats and challenges**. While the early stages of the crisis saw many citizens rally behind their national governments and EU member states move towards more cooperation, the next stage of the crisis could [lead](#) to more political divisions both within states and between them.

In what is an increasingly politicised debate over the strategic vision of the Union itself, it is thus important to identify the CEE’s most pressing threats and challenges that lie ahead:

Threat	Trends	Drivers	Triggers
Erosion of media independence and pluralism	<ul style="list-style-type: none"> <li>• State hijacking of media in Poland and Hungary, attacks on journalists and cutting of funds to independent STA in Slovenia</li> <li>• Independent journalism in CEE is struggling against disinformation fuelled by pro-Kremlin and oligarchic interests</li> </ul>	<ul style="list-style-type: none"> <li>• Rule of Law Report 2021</li> <li>• Advertising market change from transitional to digital</li> <li>• Disinformation campaigns usage</li> <li>• SLAPPs</li> </ul>	<ul style="list-style-type: none"> <li>• Elections</li> <li>• Bankruptcy or ownership changes</li> </ul>
Deterioration of rule of law	<ul style="list-style-type: none"> <li>• Met with a decline of CSO participation in government consultation over the years</li> <li>• Hijacking of the judicial system in Poland and elsewhere</li> </ul>	<ul style="list-style-type: none"> <li>• Presence of political parties that do not respect EU’s core values in the EP</li> </ul>	<ul style="list-style-type: none"> <li>• Elections</li> </ul>
Climate change	<ul style="list-style-type: none"> <li>• Floods, droughts and other manifestations of extreme weather are more likely (latest IPCC report)</li> <li>• CEE governments criticised by some for not doing enough for the climate in recovery plans</li> </ul>	<ul style="list-style-type: none"> <li>• Political myopia of political leaders, no investment in genuine long-term solutions</li> <li>• Legacy problems - underinvestment in renewables</li> </ul>	<ul style="list-style-type: none"> <li>• Natural disasters occurrence (flood, forest fires)</li> <li>• New radical policies - raising prices on energy</li> <li>• EU <a href="#">fails</a> to achieve</li> </ul>

		<ul style="list-style-type: none"> <li>• New tech coming in</li> <li>• Big energy suppliers/ powers competition (Russia, US)</li> <li>• Wetlands</li> </ul>	major reforms and/or institutionalisation, leaving climate change as one of those fields where member states formulate potential sub-groups that are less efficient
Migration	<ul style="list-style-type: none"> <li>• Weaponising of illegal migrants as hybrid warfare tactics by Lukashenka</li> <li>• Inflow of economic migrants from the east to Central Europe, outflow of skilled workers to the west</li> </ul>	<ul style="list-style-type: none"> <li>• Populist rhetorics, far-right alliances</li> </ul>	<ul style="list-style-type: none"> <li>• Deteriorating security situation in the MENA region, similar to the American withdrawal from Afghanistan</li> </ul>
Terrorism	<ul style="list-style-type: none"> <li>• Low instances compared to Western Europe, but fear over Islamic and right-wing terrorism prevalent</li> <li>• Central Europe as a buffer between Western Europe and the Balkans</li> <li>• Financing of terrorism <a href="#">online</a></li> </ul>	<ul style="list-style-type: none"> <li>• Terrorist attacks in Western Europe</li> <li>• Populist rhetoric and fear-mongering</li> </ul>	<ul style="list-style-type: none"> <li>• Revival of Islamic extremism</li> <li>• Growing popularity of self-declared paramilitary neo-nazi groups</li> </ul>
Euroscepticism	<ul style="list-style-type: none"> <li>• Ruling parties in PL and HU attacking EU law, clashes over 'sovereignty', invocation of article 7</li> <li>• Youth of Europe doubts whether the EU has what it takes to discipline eruptions of authoritarianism within the bloc</li> </ul>	<ul style="list-style-type: none"> <li>• Right-wing nationalist movements</li> <li>• Traditional Europeannists becoming excessively defensive</li> <li>• Presence of political parties that do not respect EU's core values in the EP</li> </ul>	<ul style="list-style-type: none"> <li>• Failure of national governments to efficiently spend recovery funds + poor vaccine rollout</li> <li>• Foreign policy issues further polarize and split members (i.e. Russia)</li> <li>• Another Brexit</li> <li>• Elections in France and Germany</li> <li>• Unemployment, worsening welfare</li> </ul>
Weakening of Transatlantic bond	<ul style="list-style-type: none"> <li>• Little readiness to take the reins from the US, EU helpless bystanders: Nagorno-Karabakh, no sanctions against Russia for troop mobilisation in UA</li> <li>• While the perception of the US political system under Biden is improving after Trump, the European public remains <a href="#">sceptical</a> about the restoration of America's leadership — they see a point of no return to the West of the Cold</li> </ul>	<ul style="list-style-type: none"> <li>• America's descent, focus on Pacific theatre</li> <li>• Ethnic demographic shift in the US — more focus on Africa, Asia</li> </ul>	<ul style="list-style-type: none"> <li>• EU strategic autonomy</li> <li>• Joint Trade and Technology Council proves to be just an extension of America's China policy, repels Europe</li> </ul>

	<p>War era</p> <ul style="list-style-type: none"> <li>• Mostly in the north and west, but definitely not CEE - more than half of the respondents still think the American political system is broken after events like the storming of the Capitol Hill. Out of 12 polled countries, only in PL, HL, and IT have large majorities think the political system works well (perhaps they weren't as perplexed by Trumpism due to the popularity of their own far-right establishments)</li> </ul>		
<p>Second wave of populism</p>	<ul style="list-style-type: none"> <li>• Nativist sentiments, ingrained social conservatism continue to create support for right-wing parties; while progressive youth is leaving the countries</li> <li>• There are emerging continental divides due to the pandemic: young &amp; old, people economically affected by COVID &amp; people less affected, people who see states as oppressors &amp; people who see the state as protector</li> <li>• supporters of Vox in Spain, the League in Italy, the Freedom Party in Austria, the Sweden Democrats, and the Party for Freedom in the Netherlands are more likely to blame the impact of the crisis on the government or institutions than on individuals.</li> </ul>	<ul style="list-style-type: none"> <li>• CEE's youth does not share values with Western and Northern Europe, i.e. on homosexuality</li> <li>• CEE's youth does not share values with Western and Northern Europe, i.e. on homosexuality (Hungarians split on the controversial law). Pew Research shows half of the youth opposes gay marriage in PL and HU; 70-73% oppose in LT and LV</li> <li>• Young people's erosion of trust in the current political system after lockdowns and sacrifices during COVID.</li> <li>• Populist countries becoming more libertarian and exploiting residues of the pandemic, portraying mainstream parties as authoritarian</li> </ul>	<ul style="list-style-type: none"> <li>• Some short-term internal turmoil (political, economic, societal)</li> <li>• Increased competition for jobs due to automation</li> </ul>
<p>Demographic burdens on labour force and economy</p>	<ul style="list-style-type: none"> <li>• Population in decline and rapidly aging = deteriorating age dependency ratio.</li> <li>• Brain drain of young, skilled,</li> </ul>	<ul style="list-style-type: none"> <li>• Frustration of youth perpetuates the brain drain cycle</li> </ul>	<ul style="list-style-type: none"> <li>• Unpopular government decisions exacerbate this</li> </ul>

	educated workers to the West.		
Health risks	<ul style="list-style-type: none"> <li>• Double standards of food lead to increased illegal imports of food and products from Western Europe, which is often not subject to health and safety checks</li> <li>• Waste from western <a href="#">Europe</a></li> <li>• Outflow of doctors from east to west, CEE trains doctors and they leave for better salaries</li> </ul>	<ul style="list-style-type: none"> <li>• Relatively <a href="#">low</a> health expenditure in CEE</li> </ul>	<ul style="list-style-type: none"> <li>• Future pandemics</li> </ul>
EU in international relations - unable to strike the right balance	<ul style="list-style-type: none"> <li>• Inability to speak with a common voice (EU-level) on foreign policy issues (i.e. Israel, Russia, etc.)</li> <li>• Astanisation of regional conflicts, Europe is excluded from the settlement of regional conflicts in favour of Russia and Turkey (Nagorno-Karabakh)</li> <li>• Defence integration may be supported by most, but France still hasn't given a definition of their defence initiative, unclear how a European Army would differ from PESCO</li> <li>• Still no common policy towards China</li> </ul>	<ul style="list-style-type: none"> <li>• An increasingly multipolar world where China and the US are focused on their interests</li> <li>• No common defence capability</li> </ul>	<ul style="list-style-type: none"> <li>• Strategic overreach, 'European Champions' - alienates CEE</li> <li>• The US no longer engaged in large-scale military operations in Africa and the Middle East, leaves Europe to the crises and conflict resolution</li> </ul>
Failure to achieve economic convergence across the bloc, achieve digital transformation of economies	<ul style="list-style-type: none"> <li>• Need a new economic model to move into higher-value chain production, but according to European Innovation Scoreboard 2019, all CEE states are either 'moderate' or 'modest' innovators (Bulgaria and Romania worst in Europe). Also requires large capital outlays and a high level of education — weaknesses of CEE.</li> <li>• Young STEM-educated, ICT-capable generation shrinking</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of stable political environment</li> <li>• Mediocre education environment</li> <li>• Lack of an infrastructure level-playing field</li> <li>• Low 5G readiness</li> </ul>	<ul style="list-style-type: none"> <li>• Economic crises, frugal four reluctance</li> <li>• The Green Deal inequities</li> <li>• Return to austerity</li> <li>• Offshoring by MNCs</li> <li>• Inability to reskill population</li> </ul>
Cyberattacks	<ul style="list-style-type: none"> <li>• Cyberattacks on the bloc increasingly annually</li> </ul>	<ul style="list-style-type: none"> <li>• As countries transition to more e-government services, particularly vulnerable citizen info</li> </ul>	<ul style="list-style-type: none"> <li>• Increase of rogue states</li> </ul>
Economic and trade dependency on Russia and China	<ul style="list-style-type: none"> <li>• Trade with Russia rebounding, mostly energy imports</li> <li>• Europe cannot maintain its standard of living without China as a trade partner</li> <li>• Health materials like masks can become strategic products - what</li> </ul>	<ul style="list-style-type: none"> <li>• Nord Stream 2</li> <li>• Increasing Chinese freight to Europe</li> <li>• China's BRI and 17+1, plus infrastructure investment</li> </ul>	

	prevents the same happening to rare metals vital for production value chains and Europe's future industry?		
Disinformation campaigns from malign actors	<ul style="list-style-type: none"> <li>Region's declining media literacy, low disinformation resilience</li> <li>Russia's hybrid warfare, attacks on NATO legitimacy</li> </ul>		<ul style="list-style-type: none"> <li>Belarus falls, Ukraine falls — Eastern Europe has no bulwark against hybrid tactics</li> <li>Elections always bring opportunities</li> </ul>
Mediocre education	<ul style="list-style-type: none"> <li>PL and HU growing pressure on independent scholars and institutions to play conservative politics</li> <li>Unequal distribution of opportunities/ access to high-quality education</li> <li></li> </ul>	<ul style="list-style-type: none"> <li>Reluctance by govts to reform the education sector</li> </ul>	
Deteriorating situation in Eastern Neighborhood	<ul style="list-style-type: none"> <li>Situation in Belarus, security in Ukraine - lots of wildcards</li> </ul>		<ul style="list-style-type: none"> <li>Unanimity rules hinder response, like the Cyprus vote against Belarus sanctions</li> <li>Nagorno-Karabakh conflicts spark up</li> </ul>
Oligarchy and state capture	<ul style="list-style-type: none"> <li>Private entrepreneurship is under pressure from uneven competition from the political sphere (Hungarian cronyism, CZ and SK rise of wealthy class to politics)</li> </ul>		
Corruption	<ul style="list-style-type: none"> <li>Associated with democratic backsliding, see statistics below</li> <li>High public perception of corruption</li> </ul>		<ul style="list-style-type: none"> <li>More influx of EU funds, also 3SI funds and private investment</li> </ul>
Energy insecurity	<ul style="list-style-type: none"> <li>Dependency on Russia for energy supplies, Nord Stream 2; 50% on average across the CEE</li> <li>HU cooperating with Russia to build nuclear plants</li> <li>Crises like pandemics have a disproportionate impact on Europeans in the south and east relative to wealthier citizens of north and west</li> </ul>		<ul style="list-style-type: none"> <li>Weaponising of the pipeline by Moscow</li> </ul>
Economic insecurity	<ul style="list-style-type: none"> <li>EU citizens consider rising unemployment and handling of</li> </ul>	<ul style="list-style-type: none"> <li>Rising rent prices in European capitals</li> </ul>	<ul style="list-style-type: none"> <li>Unemployment as jobs lost to</li> </ul>

	the recession the biggest failures of the EU in 2021	<ul style="list-style-type: none"> <li>• The pandemic</li> </ul>	automation creates an abundance of traditional labourers
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## Trust and distrust in EU institutions

Since summer 2020 **trust in EU institutions has risen from 43% to 49%** – the highest since spring of 2008. **Understanding of how the EU works is also at an all-time high**, with younger generations more fluent in comprehension – they are also [less](#) likely to be in favour of dismantling the EU. Trust in EU institutions has been on a generally positive trend since 2015. However, according to polling [commissioned](#) by ECFR, **slow vaccine roll-out has had a negative impact on the public perception of the EU** – clearly, the public is disappointed by the performance of EU institutions, such as failure by the Commission to secure a sufficient supply of vaccines throughout February and March 2021, but still **agrees that cooperation on an EU-level is essential**.

During the same time interval, trust in national governments on average fell from 40% to 36% (although this number varies across countries). **6/8 countries that distrust their government most are from the CEE:** Czechia and Slovenia (81% tend not to trust in both countries), Latvia (77%), Croatia (75%), Spain and Slovakia (both 74%), Greece (71%) and Poland (70%). People in countries most badly hit by the pandemic, which are in south and east Europe, tend to be more suspicious of the governments' intentions behind lockdowns and other restrictive measures.

A useful distinction on attitudes towards the European Union is provided by Centre Kantar sur le Futur de l'Europe. Accordingly, there are two types of support: 'diffuse support', or the intangible feelings such as the endorsement of a vision and values, and 'specific support', which is the assessment of the effectiveness at the EU level. As such, the more common type of support across the bloc is diffuse support. **Almost half of the total public opinion across the bloc [views](#) the EU as not 'effective'**, but this does not necessarily translate into Euroscepticism or opposition to European integration.

Political jockeying of the EU may be interpreted as a driver for the exhaustive list of threats listed above. As mentioned, the EU's effectiveness in dealing with potential threats not only translates to its reputation as a crisis-management tool but also the overall trust in the EU institutions. Below are some perceived institutional weaknesses of the bloc's political process that have spurred calls for reform in recent years:

- Clashes between the European Council and the European Commission over the *Spitzenkandidat*, or the election process of the EU Commissioner that is criticised for cementing existing party structures and giving the power almost automatically to the EPP. The system has lots of opponents, including the V4 countries who want more clout in Brussels and French President Emmanuel Macron. Macron's stance reflects the French 'unitarian' conception of sovereignty

that clashes with the pluralist conception of institutional and political practices more common in most countries of the EU.

- The power struggle between the EU Parliament and Council, as shown by the EU recovery budget negotiations. The relative success of EP in the ‘rule of law’ clause.
- More authority ceded to the European Parliament, at the expense of the Council and particularly the Commission, will only [weaken](#) further the EU’s capacity to develop and implement policy while shifting the fragile and fundamental institutional balance of power.

## Strategic autonomy

Beyond the pandemic, the EU continues to re-evaluate its role in what is an increasingly multipolar world order dominated by great power competition. Europeans are not blind to **waning American leadership on the continent and are preparing for the latter’s shift towards the Pacific**. This has led to advocacy for **European strategic autonomy, or the capacity to act autonomously in predominantly the security sector**, but also economy and technology. According to Thierry Breton, EU Commissioner for Internal Market and advocate of the concept, ‘Europe as a Market’ no longer fits the geopolitical reality. As the world becomes more transactional, ‘Europe as a Power’ is the most logical course, so the argument goes.

While the evolving realities — as outlined in the strategic compass — are recognised by all member states, strategic autonomy means different things to different member states. Recent events that transpired in Afghanistan show **the need for Europe to develop its own military capacity independent of the US**, says EU’s chief diplomat Josep Borell — if not, Europe could face similar scrambles for exit in Iraq and the Sahel region. Such calls fall in line with Macron’s call for a European Army, which faces at least two obstacles:

- 1) it is not clear how the army would be different from PESCO initiatives
- 2) lack of buy-in from within the bloc

**Europe’s eastern flank countries**, in particular, **are more reliant on Transatlanticism for security guarantees and their threat perception of Russia is more heightened than the rest of Europe**. As such, they [prefer](#) a more cautious, gradual and calculated approach towards decoupling from Washington. For example, most Eastern European countries — with exception of Slovenia and Czechia — oppose the creation of a European rapid reaction force.

The other side of the argument is that a more capable, and thus more autonomous Europe, can better work with a more Pacific-oriented administration of Joe Biden. That means Europe taking charge of its own security, like allocating proper contributions to the NATO budget but also working towards common defence. The COVID-19 crisis exposed the dramatic industrial and medical dependencies of the continent, a nail in the



coffin for the West's ambition to preserve and diffuse their hegemonic positions through global governance structures. The discourse, therefore, goes beyond just Europe's security and focuses on the **EU's status as a global superpower**.

Breton argues that exercising global influence via soft power is no longer sufficient, a more powerful Europe requires hard power. Since **European voters today feel like there are no more 'natural alliances' with other countries that transcend different policy issues**, there is a need to build a stronger sense of self and take a cooperative rather than confrontational stance on the changing international environment. **This means transactional partnerships with actors like China and Russia, who many Europeans view not as allies but as 'necessary partners'**.

But is the accumulation of hard power the answer? That is up for debate. A survey by the ECFR shows that when asked about the EU's future, **most respondents (33%) say, 'The EU should be a beacon of democracy and human rights, prioritising the rule of law and high democratic standards within its own ranks,' while only 18% say that, "The EU should be one of the world's great powers, capable of defending itself from external threats, including through military means when necessary.'**

**Interestingly, France is one of the few countries that prefer the latter over the former.** Power dynamics are certainly at play when it comes to the question of Europe pursuing an interests-based foreign policy versus a values-based one. The enlargements to CEE countries have forced France to clarify its European project and face the fact that the EU is not just an instrument to promote French national interests. Likewise, Central Europe had to do its share, like debunking the old *Intermarium* connotations of the Three Seas Initiative (previously seen as an attempt to counter German influence in the region).

To say the least, there is reasoning on both sides. **Western Europe's push for a globally competitive 'European Champions' campaign stirs [suspicions](#) about protectionism and distrust among Central Europeans.** Meanwhile, the democratic backsliding and deteriorating rule of law among CEE members complicates efforts to escape old stereotypes in pursuit of a political and economic level playing field in the bloc.