

Izzy Colledge and Anna Ayers (June 2026)

The strategic value of public opinion in the EU's neighbourhood

***FLEET** (Fresh Look at Eastern European Trends) is a FES-initiated network of young, open-minded security experts from across the OSCE space. The group has met regularly since 2015 to develop joint policy proposals on how to resume cooperation and stabilise European security, including [Islands of Cooperation](#) and [Responsible Europe](#). From the outset it has sought to find common ground and develop a joint approach following intensive, contro-*

versial debates. After Russia's full-scale invasion of Ukraine in 2022, members of FLEET continued debating different perspectives, but it became more difficult to develop a unified position or a new joint vision. We thus continue the series of FLEET publications with a collection of essays by various members, which shed light on different components of European security.

Key messages

- The EU's image is contested, seen by some as modernising and beneficial, but by others as linked to higher prices and threats to national identity. Support is largely pragmatic, not ideological, so EU engagement must deliver visible gains on security, prosperity and sovereignty, rather than rely on abstract ideological appeals.
- Concerns about sovereignty, values, and economic costs can erode support, especially when expectations are unmet. The EU should communicate conditions, timelines, limits and benefits clearly, while making its support more tangible in daily life.
- Identity and values are key battlegrounds. Policymakers should show how European rights and freedoms can safeguard, rather than threaten, national ways of life, helping counter disinformation and sovereignty concerns.
- Domestic and external actors strongly shape perceptions, either by overpromising what engagement can deliver or by exploiting dissatisfaction. The EU should seek to understand public attitudes and engage citizens and communities directly with locally relevant support.

Introduction

Confronting a shifting strategic landscape in its neighbourhood and beyond, the European Union's ability to sustain public support in candidate and neighbouring states has become increasingly important for effective external engagement. Positive public opinion is vital to sustaining legitimacy and pursuing strategic objectives in the region. Understanding how the EU can ensure long-lasting public support, and the key pitfalls that risk undermining it, is a key strategic challenge for policymakers.

This paper examines the EU's wider neighbourhood strategy from a bottom-up perspective, drawing on ORB International's primary research among the general public in candidate countries to show how societal attitudes and collective preferences shape political dynamics. It identifies the conditions under which EU policy may gain or lose public legitimacy, and how this may constrain the EU's strategic direction.

We argue that the EU should put public expectations at the centre of its neighbourhood strategy and align policy delivery, communication and political conditionality with locally grounded perceptions of credibility and benefit. Misreading or disregarding public opinion could result in policies that fail to resonate or meet expectations in partner countries. To sustain its influence, EU policy must be calibrated to domestic expectations to avoid legitimacy gaps that may undermine implementation: misaligned expectations, or perceptions that the EU and its domestic partners overpromise and underdeliver, risk undermining credibility. The EU must communicate in ways that strike a local chord and ensure that its credibility is not undermined by mixed signals, or association with domestic political dissatisfaction.

Using empirical examples from research in Moldova, Georgia and the Balkans, we show how citizens interpret EU engagement and provide insights for more responsive and effective policy approaches. We underscore the importance of incorporating the views of those most directly affected in assessing the EU's ability to project influence beyond its borders. Understanding these perspectives can help shape communication strategies, ensure credible commitments and sustain long-term support for EU engagement.

Public opinion as a strategic constraint

The effectiveness of the European Union's engagement in its neighbourhood is shaped not only by institutional agreements and elite decision-making, but also by public attitudes, which condition how policies are received domestically.

ORB International, whose expertise is built on decades of primary research across the European neighbourhood, shows that public views on international partnerships are complex, multilayered and often inconsistent.

Methodological note: data sources

ORB International primary research

- Moldova – quantitative surveys (n=1,300–2,000; seven waves, September 2022–September 2025); qualitative focus groups (eleven rounds, July 2022–August 2025)
- Georgia – quantitative surveys (n=1,300–2,000; six waves, September 2022–August 2025); qualitative focus groups (six rounds, March 2023–July 2025)
- Balkans – quantitative surveys, March 2026 (n=1000 per country in Bosnia and Herzegovina, Bulgaria, Croatia, Greece, Romania, Serbia and Turkey, n=750 per country in Albania, Montenegro, North Macedonia and Kosovo)

Secondary research insights

- Moldova, Institutul de Politici Publice – Public Opinion Barometer
- Georgia, International Republican Institute – Public Opinion Survey in Georgia (September–October 2023); European Commission – Eurobarometer (Autumn 2025)
- Balkans, Regional Cooperation Council – Balkan Barometer 2024 and 2025

There is a risk of oversimplifying this landscape by assuming a clear divide between supporters and opponents of EU integration. In practice, support is often inconsistent and conditional, coexisting with scepticism about reforms and concerns about short- and long-term costs. For example, while the EU is often associated with mobility and opportunity, and represents a progressive choice for safeguarding sovereignty, concerns about higher prices, stringent regulation or ideologies of social change are also widespread. Public opinion tends to be shaped by imagined futures and resonant narratives, and so support for EU engagement is neither stable nor guaranteed.

Failing to account for such ambiguity harbours the danger of overestimating support and provoking an unexpected backlash if tangible positive changes do not materialise. High levels of nominal support may mask shallow commitment. Overpromising by European actors or domestic politicians advocating for EU membership risks accelerating disillusionment if delivery falls short. Sustaining support therefore depends on transparency and credible communication. Focusing on tangible, everyday benefits and delivering promised programmes effectively can build trust and ensure that EU engagement remains sustainable over time.

Perceptions are also shaped by domestic and external political actors, which means that some key drivers of public opinion are beyond the EU's direct control. Domestic actors can mediate perceptions of the EU by making promises about what engagement can deliver, or by linking it to internal issues such as wage stagnation, inflation or corruption, just as actors in EU Member States may use it as a convenient scapegoat for unpopular domestic policies. Disinformation actors, whether operating domestically, regionally or from afar, exploit existing dissatisfaction, amplifying genuine frustration and fatigue to undermine EU support. In this context, the EU's often technocratic approach may fail to offer an effective counter to those seeking to undermine its influence.

Fragile alignment in Moldova: balancing expectations and domestic politics

Moldova illustrates how public opinion dynamics shape the environment in which EU policymakers operate. Beneath headline support for European integration lie conditional attitudes and competing expectations that create both opportunities and constraints for engagement.

Public opinion in Moldova has largely consolidated in favour of closer relations with the EU. ORB International research (Summer 2025) shows that the EU is preferred as a long-term strategic partner (47%) over Russia (34%), reflecting a long-term shift from the early 2010s, where there was a consistent pro-Russian preference.³ However, this trend masks significant complexity, particularly when one turns one's attention from abstract geopolitical preferences to expectations of what the EU can deliver in practice.

What Moldovans expect the EU to deliver

Support for EU engagement throughout the wider European neighbourhood is often pragmatic rather than ideological. Moldovans tend to associate the EU with development, opportunity and protective sovereignty, but this support is contingent on tangible improvements in everyday life. EU membership is often framed as a pathway to modernisation, improved living standards and expanded access to markets and mobility. Sentiment driver analysis shows that support for EU partnership is driven in particular by beliefs that the EU would create employment opportunities and support Moldova's long-term development. Qualitative findings from focus groups conducted in Moldova throughout 2022–2025 indicate strong awareness of specific EU programmes supporting education, entrepreneurship and domestic growth.

Assistance is welcomed when it is seen as strengthening Moldova's national capacity, institutions and economic base. Positive examples of tangible benefits from EU membership focus on opportunities for Moldovans to work and study abroad, and for opportunities to expand exports and business links to the bloc. In this sense, EU engagement is

Moldova

Since gaining independence in 1991, Moldova has often been framed as caught between East and West, and its future reduced to a choice between competing geopolitical and civilisational paths. This narrative overlooks the complexities of Moldovan society and the motives of its citizens. In reality, support for the EU is substantial but largely conditional and instrumental, rather than reflecting a clear binary divide within society.

This framing nevertheless reflects real structural pressures linked to Moldova's geography and Soviet legacy. While Moldova borders the EU, Moldovan and EU authorities have identified Russian pressure applied by leveraging energy insecurity, the unresolved Transnistrian conflict, and more recent hybrid threats, including information manipulation and electoral interference.¹ Successive governments have sought to balance these pressures, though since the election of President Maia Sandu in 2020 and Russia's full-scale invasion of Ukraine in 2022, Moldova has increasingly aligned itself with the path towards EU membership.²

often understood as sovereignty-enhancing: a way to strengthen Moldova's capacity to withstand external pressure, reduce dependency and exercise greater control over its own development.

These perceived gains reinforce the link between support for EU integration and the perception of tangible improvements the relationship may offer, rather than an abstract choice of geopolitical alignment.

Fragile commitment and conditional support

Despite this evidence of a strong baseline of support for EU integration, this support remains fragile, and concerns around unintended consequences prevent people from fully committing to this path.

These concerns cluster around national security and sovereignty over decision-making, economic consequences and social cohesion. Not even Russia's full-scale invasion of Ukraine has driven a decisive convergence of public opinion around EU accession as a security solution after 2022. Notably, in September 2025, 41% of Moldovans believed that neutrality remained the best guarantee of national security, compared with 31% who favour EU accession, reflecting persistent caution even in the wake of Russia's invasion of Ukraine.⁴ Some focus group participants fear that closer integration could undermine national sovereignty or provoke Russia to take a more aggressive stance in their bilateral relations.

While some Moldovans believe that EU engagement could strengthen their sovereignty by supporting development and building domestic capacity, others fear it might limit the country's freedom to act. For them, closer integration may mean adopting rules made abroad, which may or may not serve Moldova's interests. Beyond this, some are concerned that aligning fully with the EU may provoke Russia to step up pressure on the country, whether by interfering with energy supplies or by bombarding them with disinformation or exerting other forms of influence. While the EU is preferred to Russia in a binary choice, it is not a risk-free option, but fraught with concerns about security and decision-making sovereignty that the EU should attend to.

Economic concerns are particularly salient. While EU engagement is associated positively with development, there is a recurring fear that prices will rise without corresponding wage growth, leaving Moldova as a source of cheap labour for wealthier European states. Some feel that this is already happening. Others worry that external support may foster dependency rather than building sustainable domestic capacity. Freedom of movement is similarly double-edged: while seen as an opportunity for young Moldovans to study and work abroad, it raises concerns about accelerating emigration and worsening the brain drain. For example, Moldovans have long been able to access the EU through their right to Romanian citizenship, but many fear that opening up these opportunities directly would exacerbate the exodus of young, ambitious and highly skilled workers, who might otherwise contribute to Moldova's development.

This combination of high expectations and perceived trade-offs helps to explain why support for EU integration, though widespread, remains fragile. This is evidenced by the narrow 50.35% to 49.65% pro-European vote in the 2024 constitutional referendum.⁵

Domestic political dynamics shaping perceptions of the EU

Domestic political dynamics also influence perceptions of the EU. Domestic actors shape public opinion by linking European integration to their own performance in other policy areas, associating the EU's image with things it cannot directly control.

Moldova's governing Party of Action and Solidarity (PAS) is strongly associated with the EU path, and its electoral messaging frames it as the only credible option for pro-European voters. While this has consolidated pro-European support electorally, it has also tied perceptions of EU integration to dissatisfaction with domestic governance. Although the party went on to secure a decisive electoral victory, focus group discussions ahead of the 2025 parliamentary elections revealed deep disillusionment with it. As ORB's analysis of the election argues, PAS's success reflected less a wholehearted endorsement of its domestic record than a decision by voters to maintain Moldova's pro-Euro-

pean direction amid fears of instability and Russian influence.⁶ PAS was seen as failing to deliver on previous electoral promises, amid frustration over rising living costs, weak economic progress and perceived delivery failures. There is a risk that these grievances will transform into scepticism towards EU integration itself.

Implications for EU engagement

Moldova therefore demonstrates how a strong baseline of support for European integration can coexist with uncertainty and ambivalence, with consensus masking a distinct level of fragility. It shows that the EU's engagement with candidate countries and neighbourhood states is shaped by factors beyond its control, and that support can weaken where expectations of tangible improvement are not met. The Moldovan case points to three broader lessons for EU engagement: (i) policymakers must ensure that expectations are aligned with delivery; (ii) concerns about economic and social trade-offs must be addressed; and (iii), where possible, EU policy should be insulated from domestic political volatility. None of these is easy to achieve, not least within EU Member States themselves. However, failing to do so risks eroding credibility and strengthening opposition to the EU's long-term strategic objectives.

Georgia's conditional alignment: balancing Europe and risk

Georgia likewise presents a particularly compelling case for examining how public opinion shapes geopolitical positioning in the EU's neighbourhood. Situated at the intersection of Western and Russian spheres of influence, Georgia's foreign policy orientation cannot be adequately understood without accounting for its population's preferences, fears and expectations. Public opinion has contributed to the development of complex and at times contradictory dynamics in the country's positioning between West and East, revealing the limits of elite-centric explanations of foreign policy behaviour.

At the core of Georgian public opinion lies a strong desire for security and sovereignty, shaped by the country's historical trajectory, particularly its Soviet past and the 2008 Russian invasion, which resulted in the ongoing occupation of approximately 20% of Georgian territory. This has given rise to persistent anxiety over territorial integrity and external threats. In 2023, 77% of Georgians identified Russia as the country's greatest political threat, a perception consistently echoed in ORB's qualitative research.⁷ These experiences continue to shape societal attitudes toward both Russia and Western countries and institutions, particularly the EU and NATO. This anchors geopolitical preferences in lived experience rather than in abstract alignment.

European aspirations and internal contestation

Georgians exhibit a pronounced sense of cultural pride and a strong aspiration to political independence, intertwined

closely with individual economic concerns. Public opinion surveys consistently demonstrate high levels of support for European integration, driven by expectations of economic stability, growth and expanded opportunities. In April 2025, 75% of Georgians thought that their country would benefit from EU membership.⁸ But while the overarching goals of security, sovereignty and prosperity are broadly shared, there is less consensus regarding the means through which these objectives can be achieved. This divergence has created fertile ground for contestation over Georgia's foreign policy orientation and reflects the conditional nature of public support.

Disinformation and the politics of fear

Russia is waging an intensive disinformation campaign within this contested environment. However, pro-Russian orientations in Georgia tend to be grounded in risk aversion and fear rather than any positive identification with Russia. ORB's regression analysis of public opinion data indicates that preferences with regard to Georgia's foreign policy trajectory are driven largely by persistent fears of economic vulnerability and security escalation, especially among the older generation. Analysis of sentiment drivers shows that concerns about the potential loss of access to Russian markets for Georgian goods remain a significant factor in hesitation about fully severing ties with Russia. Insights from focus groups further suggest that some citizens fear that pushing Russia too far away could provoke renewed aggression, and that maintaining a degree of engagement is perceived as a pragmatic strategy for managing risk and preserving fragile security conditions.

At the same time, ORB's data indicate that many Georgians continue to view the West, and the European Union in particular, as a key guarantor of sovereignty, territorial integrity and long-term security. Support for closer engagement with Western institutions is strongly associated with perceptions of protection against Russian aggression and expectations of economic stability and growth. This reflects a belief that Western alignment offers way of safeguarding national independence. But despite the relatively strong awareness of Russian influence operations in Georgia, Russian state-sponsored narratives have nonetheless played effectively on existing fears of Western infringement on Georgian traditional values, which is one of the main concerns associated with closer integration with the EU.

The key implication for the EU is that it must try to capitalise on existing public confidence in its ability to support Georgia's sovereignty and deliver economic benefits, while showcasing alignment of European and Georgian values, particularly regarding freedom, democracy and national self-determination. This can be achieved by highlighting EU Member States that have maintained strong national and cultural identities alongside integration. While emphasising that the EU protects indigenous culture, faith and language it must also be clear about the importance of

dignity and non-violence for every citizen. In practice, this means demonstrating that the protection of Georgian religious and cultural identity is fully compatible with the broader European commitment to safeguarding the rights and freedoms of all individuals, including minorities. Such an approach would strengthen confidence that closer alignment with the EU would enhance Georgia's independence from Russia, while mitigating the fears deliberately sowed by the ruling Georgian Dream party and the Georgian Orthodox Church, amplified by Russian disinformation.

Public opinion and political mobilisation

Strong public support for the EU in Georgia has translated into tangible political behaviour, particularly through sustained protests. Georgian citizens have a long tradition of civic mobilisation, frequently taking to the streets to contest government actions perceived as undermining democratic freedoms or European integration. In recent years, however, the effectiveness of protest has diminished in part because of the Georgian Dream government's consolidation of power. This includes the adoption of legislation intended to shed a stark light on foreign funding to Georgian NGOs and media. Introduction of the law triggered mass opposition protests that ultimately proved unsuccessful, followed by a period of heightened political instability, including disputed parliamentary elections, a parliamentary boycott by the opposition, and President Salome Zurbishvili's unsuccessful attempt to challenge the legitimacy of the new political order and remain in office. Together, these developments deepened political polarisation and contributed to a more constrained political environment, weakening civic engagement and reducing public confidence in the ability of protest and democratic participation to influence political outcomes.

EU signalling and the risk of disillusionment

These domestic dynamics are closely linked to external signals from the European Union. The EU's decision to freeze Georgia's EU accession process in response to »democratic backsliding« has had unintended consequences with regard to public opinion. While many citizens understand the normative rationale behind this stance, the distancing of European institutions risks alienating segments of a population that remains overwhelmingly pro-European. Over time, this disconnect may foster frustration and disillusionment, particularly if citizens feel collectively penalised for the actions of political elites. Trust in the EU has already dropped from 58% in autumn 2024 to 49% in spring 2025.⁹

This dynamic has dampened the ability of public opinion to translate into sustained political pressure, a trend further exacerbated by Georgian Dream's suspension of the EU accession process in response to the EU's freeze. Ambiguous and inconsistent EU signalling has meant that even strong pro-European sentiment does not reliably convert into civic mobilisation or effective constraints on governing

elites. In the absence of a tangible accession path, citizens are less motivated to hold elites accountable when it comes to keeping the EU at the centre of the political debate. This dynamic directly benefits the Georgian Dream government, lowering the domestic political costs of distancing the country from Western integration and allowing it to pursue strategic decoupling with limited societal resistance. There is a concern that over time thoughts of EU membership may gradually recede into the background of domestic political debate.

This challenge is compounded by the EU's struggle to communicate effectively with Georgian society. This problem is scarcely unique to Georgia and is shared across the wider neighbourhood. The EU is often perceived as a somewhat abstract and ideologically distant entity characterised by bureaucratic complexity. Additionally, broader ideological perceptions of EU values, which many Georgians admire, and the concrete policy measures required to uphold those values may become unmoored from one another. Georgians might be more hesitant to implement such measures given the country's social conservatism, particularly on such issues as LGBTQ+ rights. This limits emotional attachments, weakens the EU's ability to sustain societal support during periods of political tension and risks disillusionment. In the absence of more effective engagement, prolonged uncertainty and perceived neglect risk eroding the EU's normative appeal, even in a society that has historically identified strongly with Europe.

Implications for EU engagement

These dynamics highlight the need for a more targeted EU engagement strategy in Georgia. The EU should provide clearer signalling on accession, increase direct and visible engagement with Georgian society, and communicate tangible economic and security benefits. Efforts should also counter disinformation by addressing concerns around cultural identity. Without this, strong pro-European sentiment may fail to translate into sustained political pressure, enabling further drift from the European path.

The Balkans: preventing strategic drift and preserving EU influence

Public opinion in the Balkans is an important determinant of the EU's external engagement and the wider regional security environment. Historically, strong public support for EU integration across many countries in the region has enabled governments to pursue reforms aligned with EU norms, reinforcing EU influence. However, such support must now contend with broader political dissatisfaction and democratic scepticism. Across the region, 51% say they want to see fundamental change in their countries' politics, while two in five (40%) feel that it is more important for leadership to be strong than democratic.¹⁰

This fragility is also visible in attitudes towards the EU itself. Declining confidence, reflected in the drop in the

belief that EU membership would be good for their countries' economy from 62% in 2021 to 54% in 2024, has exposed growing frustration with slow accession progress and limited tangible outcomes.¹¹ This erosion constrains reform efforts and weakens the EU's leverage, even as the rebound to 64% in 2025 demonstrates that public sentiment remains volatile and highly responsive to perceptions of credibility and delivery.¹² Compounding this volatility, EU favourability varies sharply across the region: while attitudes are overwhelmingly positive in Albania and Kosovo, at 94% and 82%, respectively, favourable views fall to 53% in Bosnia and Herzegovina and only 31% in Serbia.¹³ This uneven landscape constrains reform efforts and attenuates EU influence, particularly where accession is seen as distant, uncertain or unable to deliver tangible improvements.

At the same time, as in our other two case studies, the information space has become increasingly contested, both by domestic and regional actors, and from further afield. Russia exploits mistrust through disinformation that undermines confidence in the EU, while China seeks to shape perceptions through visible economic engagement that contrasts with the EU's conditional approach. In this context, public opinion functions as a key arena of geopolitical competition, directly shaping alignment choices and the EU's ability to act effectively. Yet public concern about foreign influence is not directed solely at non-Western actors. While 60% agree that foreign countries are attempting to influence their country through disinformation, responsibility is attributed to a range of actors: the EU is seen as responsible by 36%, on a par with Russia, while the United States is cited most often, at 52%.¹⁴ This indicates that the EU is operating in an environment in which external influence is widely recognised, but its own role may also be viewed with suspicion.

Ultimately, where citizens view the EU as credible and attainable, reform momentum and alignment are strengthened; where scepticism prevails, space opens up for competing actors and potential instability. A more consistent, tangible and communicative approach is therefore essential to securing the EU's role in the region. This requires clearly demonstrating EU support for projects that have a direct impact on people's lives, while making the accession process more transparent and predictable through clearer benchmarks and interim rewards. Strengthening strategic communication and supporting independent media are also important to counter disinformation, although such efforts must be led from the grassroots if they are to build trust rather than deepen suspicion.

Policy implications for the EU: how to mobilise support

Societal support for European integration is not only a source of normative appeal, but a strategic asset that underpins the EU's credibility, legitimacy and ability to act effectively in its neighbourhood. If public support is maintained, it can also weather short-term volatility and changes in political direction at the domestic level, allowing the EU to maintain more sustainable influence within its neighbourhood. However, primary data show that EU credibility depends on its ability to meet public expectations in practice, sustaining trust while managing political pressures both within the Union and in partner countries.

At the core of this challenge is a persistent gap between expectations and delivery. Failure to clearly stipulate the scope, conditions and limitations of cooperation increases the risk of overpromising and underdelivering. An overreliance on excessively ideological arguments for EU integration may neglect the conditional nature of pro-EU attitudes for many people in the neighbourhood and risk eroding trust if anticipated benefits do not materialise.

The case studies we have discussed highlight how this dynamic plays out in practice. Where, as in Moldova and the Balkans, expectations are not met with visible improvements to daily life, public support can harden into scepticism, constraining EU engagement. In Georgia, strong aspirational narratives can drive support in the short term, but risk broader disillusionment and a dampening of public engagement if expectations outpace delivery. These dynamics pose a significant challenge not only to public

support in partner countries but also to the EU's credibility and policy coherence.

These dynamics underscore the importance of transparency and accessible communication on the part of EU institutions with regard to how and when communities see tangible improvements. A lack of clarity around foreign actors' intentions may give rise to distrust, allowing fear and uncertainty to take hold. This allows opponents, as well as other actors in the information space, to present a narrative that links ordinary people's fears and insecurities to their countries' relationship with the EU.

Ultimately, reaching out to neighbouring states should not be confined to public diplomacy, but also include engaging with ordinary citizens as a core component of the EU's neighbourhood strategy. This does not mean engaging directly in domestic political debates or making sweeping changes to the overall strategy. Rather strategy must be communicated clearly and EU-supported programmes should be made visible and responsive to their users. Listening to these groups can help the EU understand how its engagement is perceived, what expectations and concerns about its relations with their countries are developing, and when to take action to resolve an emerging disconnect. Leveraging the voices of ordinary people while engaging those with the agency to drive change can guide a more effective strategy and help to reinforce the EU's underlying message about its engagement abroad. Without such an approach, strong baseline support may prove fragile, limiting the EU's ability to pursue its strategic objectives across the region.

Endnotes

1 On Moldova's EU path and Russian hybrid pressures, including energy, security, information manipulation and electoral interference, see Council of the European Union, Joint Declaration following the first Republic of Moldova–EU Summit, 4 July 2025. Available at: https://www.consilium.europa.eu/media/3t31gjs/eu-moldova-summit-declaration_20250704.pdf

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14 Ibid.

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