

TRENDS OF VISEGRAD EUROPEAN POLICY

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AMO.CZ



Konrad
Adenauer
Stiftung

Trends of Visegrad European Policy

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Table of Contents

| | |
|---|-----------|
| Preface | 7 |
| Introduction | 9 |
| Note on methodology | 10 |
| Partners and allies of the Visegrad Group in the EU | 12 |
| The prospects of EU governance | 18 |
| EU economic policies | 23 |
| Selected aspects of EU external affairs | 27 |
| Conclusions | 31 |
| Authors | 35 |
| About AMO | 37 |
| About KAS | 38 |



Perceptions of the Visegrad Group have, in recent times, been formed almost exclusively by its stance on migration policy implying that the V₄ are primarily a coalition within the EU who are against something. This unfortunately ignores a number of issues: The Visegrad countries have already proven their valuable positive input for the EU on several occasions, for example their crucial cooperation in the process of integration in the EU and their commitment in several Council presidencies.

Nonetheless the Visegrad countries should have a strong interest of their own in avoiding the V₄ being labelled as a solely defensive project. Too defensive a stance might even risk the marginalisation of the group and thus a reduction of its importance on the EU level. Additionally, the EU does not need at present further brakes or obstacles but rather constructive proposals and a forward-looking approach on what the EU can do to increase security and stability for its citizens. There are many areas where Visegrad cooperation can be a part of a positive agenda and where Visegrad impulses and expertise could be most welcomed: The enhancement of the Common Security and Defence Policy for example or the promotion and support of the transformation process in the Eastern European Neighbourhood are fields where Visegrad can demonstrate their pro-European credentials. This would also facilitate the perception of Visegrad cooperation as an added value for the EU among the other member states. It is clear: the future challenges for the European Union are enormous and manifold. For this the EU needs more than one engine.

The Konrad-Adenauer-Stiftung with its office in the Czech Republic is very grateful to have the Association for International Affairs (AMO) as a renowned partner in the field of international relations and European affairs. I am convinced that the current study, based on a comparative survey of European policy trend setters' opinions in the four Visegrad countries, provides a unique insight into the European policy cultures and agendas of the four states. My gratitude goes also to the other cooperation partners and everyone who was involved in the "Trends of Visegrad European Policy" project. Strengthening European integration is a principal task of the Konrad-Adenauer-Stiftung activities in the Member States of the European Union.

Matthias Barner
Head of Prague Office
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The European policies of EU Member States are products of bureaucratic or political processes influenced by individual actors and their opinions and priorities. These opinions and priorities are instrumental in understanding the behavior of decision-makers and in explaining and predicting the European policy of the individual Member States. To contribute to this understanding, we have **explored the views of the European policy communities of the Czech Republic, Hungary, Poland and Slovakia in the “Trends of Visegrad European Policy” project**. The results of the project set out the views held by European policy makers and opinion leaders of the four countries.

The project consisted of an online survey of 20 questions, which was addressed to nearly 1,900 persons, out of which **24% responded**. The survey was conducted at a time when the Visegrad Group struggled with the **image of being the EU’s trouble maker, which it acquired during the refugee and migration crisis**. It was also a time when Slovakia, and to a lesser extent the Czech Republic, started to send **different political signals** to the EU than Hungary and Poland. The Czech Republic and Slovakia wanted to be seen as more constructive members of the EU, whereas Poland and Hungary were ready to enter new conflicts with Brussels and some Member States.

The key questions we set out in this research project were the following: **what – if any – is the Visegrad Group countries’ vision of the EU**; where are the **main disagreements** of the four countries and, on the other hand, on what issues could the **Visegrad Group** speak with a single voice. Moreover, the findings may also help to grasp if the official policies conducted by the capitals are shared within the surveyed communities of the four states.

The survey centered on several topics, enabling us to piece together many parts of the puzzle. The purpose of this publication is not to catalogue every single finding, but rather to analyze results touching on four areas: views in the four countries on allies and partners in the EU, the EU’s reform agenda, the prospects of cooperation in the EU’s economic and security policies. The aggregate results are available in an interactive form on the **project’s website at trendy.amo.cz/trendy2017**, where the full dataset of the responses can also be accessed. Visitors to the site can also have a go at answering the questionnaire used for the research.



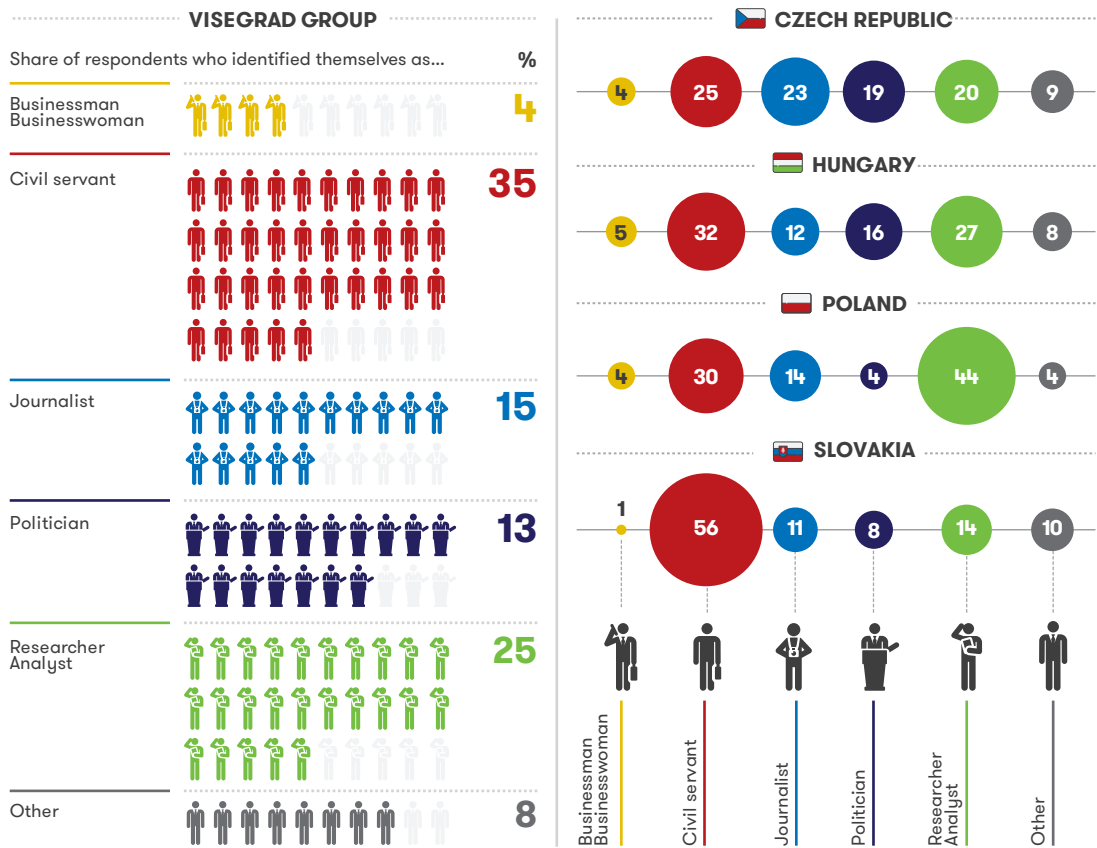
Note on methodology

The survey approached **1,898** representatives of European-policy communities of the four Visegrad countries, of whom 762 were from Poland, 431 from the Czech Republic, 392 from Hungary and 313 from Slovakia. The questionnaire was addressed to civil servants (44% of those contacted), politicians (23%), researchers and analysts (13%), journalists (13%), selected business representatives (5%) and persons who did not fit into any category (3%). Questionnaires were **returned by 451** people, equal to an overall response rate of 24%. Slovaks and Czechs were the most responsive (35% and 33% respectively), followed by Hungarians (26%). Just 13% of the Poles who were approached provided a response. Even so, given the high number of those contacted in absolute terms, the results from Poland can also be considered valid, as the overall number of respondents is close to the three other country-samples.

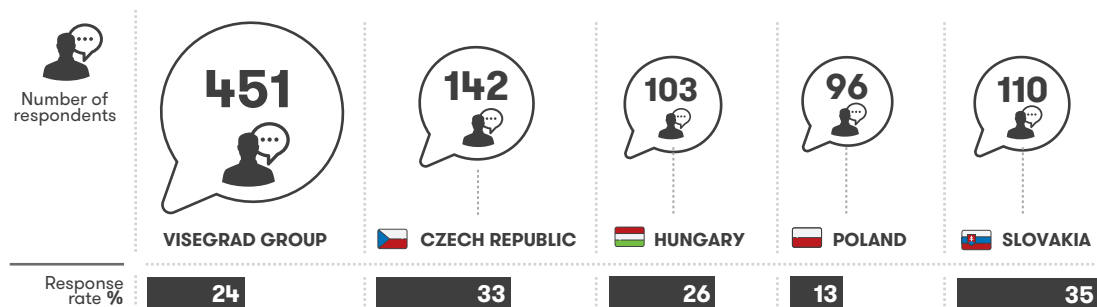


RESPONDENTS

%



NUMBER OF RESPONDENTS AND RESPONSE RATE





Considering the composition of those who returned the questionnaire, civil servants comprise 35% of the respondents, researchers and analysts 25%, journalists 15%, politicians 13%, and those who considered that they do not fit into any of the preselected categories 8%. Finally, business representatives make up 4% of the respondents.

We conceptualized the European-policy community as **politicians and civil servants working within the countries' Europe-related policies, along with other key stakeholders (primarily researchers, analysts and journalists)**. Specifically, this community is made up of:

- ➔ members of the lower and upper chambers (where applicable) of the parliament sitting on relevant committees;
- ➔ government ministers;
- ➔ members of the European Parliament;
- ➔ senior state administration employees specializing in European policies;
- ➔ ambassadors and deputy heads of mission accredited to EU-28, European Economic Area countries, candidate countries, associated countries of the Eastern Partnership, Russia, the United States and China;
- ➔ diplomats from the Permanent Representations to the EU;
- ➔ researchers and analysts focusing on EU affairs;
- ➔ journalists reporting on European affairs;
- ➔ members of the Committee of Regions and the Economic and Social Committee;
- ➔ representatives of trade unions and employers' umbrella organizations.

The survey was conducted in **August and September 2017** via the online platform SurveyMonkey. The responses were anonymized. There were 20 questions, which can be broken down into the following topics:

- ➔ partners and allies in the EU;
- ➔ EU external affairs;
- ➔ EU institutions and reforms;
- ➔ the Visegrad Group.
- ➔ EU policies;

The format of the questions was mixed. In some cases, respondents were asked to identify how much they agreed with statements prepared in advance, or whether they would see some kind of development as beneficial. In such cases, the respondents were allowed to select "I don't know". Some questions were open and required the respondents to give their own answers, which were then categorized to provide for ease of comparative analysis. Others were multiple-choice. In one case, respondents were invited to assess the quality of relations by means of a numerical scale.

The common Visegrad results **were calculated as the arithmetic means of the values of the four countries on each given question**. The aim of this approach was to minimize any distortions caused by potentially uneven proportions of responses received from the individual countries.



Partners and allies of the Visegrad Group in the EU

Three questions were geared towards the Visegrad countries' bilateral relations. Respondents were asked to name the three **most important partners** and the three closest allies of their country in the EU. Moreover, they rated the quality of relationship of their country with eleven selected EU Member States on a scale from 1 (for very good) to 5 (for very bad).

The result of the United Kingdom's referendum on EU membership in June 2016 opened up discussions about the recalibration of partnerships in the EU. As a result, the increased importance of the **Franco-German engine** has been debated. The presidential elections in France and the legislative elections in Germany stimulated further discussion on how the Paris-Berlin axis would be crucial for the future of EU integration. These developments, in addition to the fact that Berlin's role had already been on the rise during the Euro-crisis, further cement the importance of Germany for EU decision making. On the other hand, trust in Germany weakened during the refugee and migration crisis in 2015 and 2016. The various approaches to this issue brought the phenomenon of the **'East-West divide'** into EU politics, where some claimed that Western EU members (old Member States) shared distinct values and therefore saw the future of the EU differently than the Central and Eastern European Member States. The Visegrad Group placed itself into the position of an interlocutor of the latter group. The role played by the Visegrad Group during the discussion on the refugee and migration crisis and the reform of the EU's asylum and migration system also contributed to the perception that the Visegrad Group **is a strong alliance with many shared interests**. Meanwhile, apart from the Visegrad Group, there have been other regional partnerships claiming attention, like the Weimar Triangle consisting of Poland, Germany and France, and new initiatives like the Slavkov Format of the Czech Republic, Austria and Slovakia or the Three Seas Initiative promoted by Poland and Croatia bringing together 10 Central and Eastern European EU members.

Therefore, we focus in this section on data that may help us better comprehend three issues. Firstly, we focus on the Visegrad countries' relations with Germany; i.e. whether Berlin is an important partner and close ally of the Visegrad Group. Secondly, we inspect their ties with France, the United Kingdom and – an often forgotten yet relevant Central European player – Austria. Thirdly, we test the perceived strength and quality of intra-Visegrad relations.

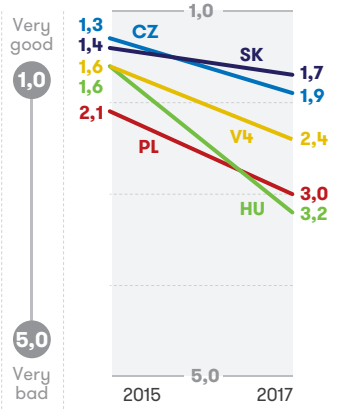
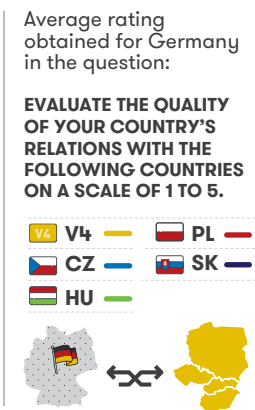
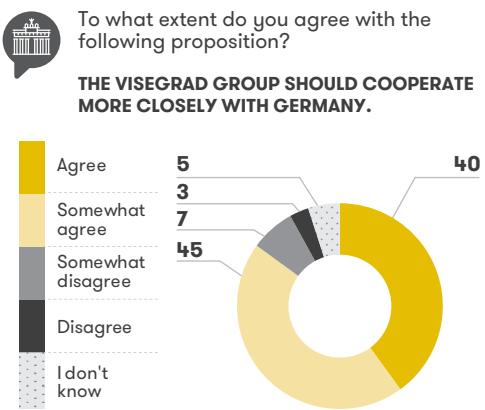
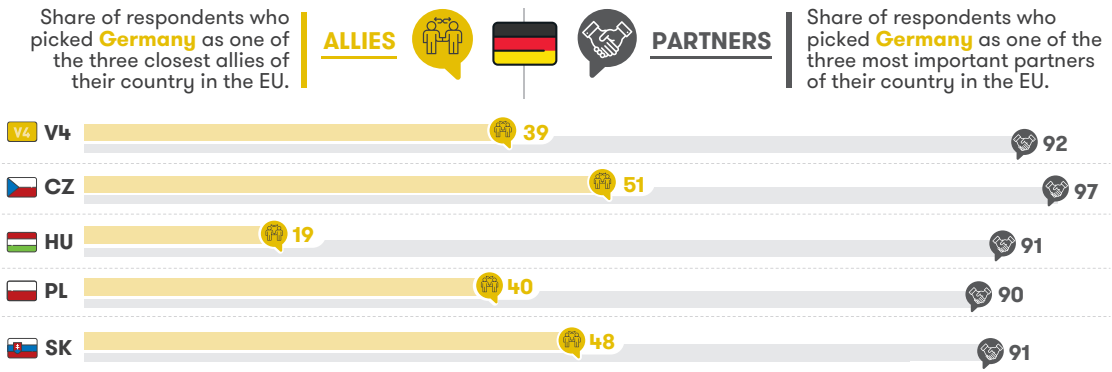
Germany was considered as **the most important partner in the EU** by respondents from all four Visegrad Group countries. It was selected as one of the three options – respondents were asked to pick the three most important partners of their state – by at least 90% of them in each country. Despite the shared acknowledgment of the importance of Germany, Berlin **is not seen as the main ally**. It scored fifth, just after the four Visegrad Group countries in the V₄ average ratings. However, the results in national samples vary. Germany was named as a close ally by around half of the Czech and Slovak respondents, by 40% of the Polish respondents but only by a fifth of the Hungarian respondents. On the other hand, respondents from



all shared the view that the **Visegrad Group itself should cooperate more closely with Germany**, as 85% of respondents agreed or somewhat agreed with this statement. Similarly, the quality of bilateral relations with Germany were evaluated as good in the Czech and Slovak cases with average ratings of 1.9 and 1.7 respectively. Though, relations with Germany were considered rather neutral by Hungarian (3) and Polish (3.2) respondents. There is a visible difference between the data gained in 2017 and answers from similar research conducted in 2015, before the peak of the refugee and migration crisis, the “Wir schaffen das” statement of Chancellor Angela Merkel on 31st August 2015, and the arrival of the Law and Justice government in Poland. Relations with Germany were seen to be much better in 2015 – the V₄ average rating was 1.6. Yet, it was just 2.4 in the 2017 poll. The most significant deterioration has taken place in the perspective of **Polish and Hungarian respondents**.

- ➔ Germany is seen by the Visegrad Group as the **most important partner in the EU**.
- ➔ Berlin is perceived as an **ally mainly by the Czech and Slovak respondents**.
- ➔ The **Visegrad Group is divided** on the evaluation of the quality of the relationship with Germany: Czechs and Slovaks see it as good, while Hungarians and Poles as rather neutral.
- ➔ Perceptions concerning relations with Germany **have worsened significantly in the past two years**.

GERMANY AS PARTNER AND ALLY %



Partners and allies of the Visegrad Group in the EU



The three Western European countries mentioned as one of the three most important partners by at least 10% of respondents were **France, Austria and the United Kingdom**. Nevertheless, there were substantive differences in the perceptions in the individual V4 countries, which need to be highlighted.

Austria was a quite significant partner for Hungary (mentioned by 56% of the respondents), relevant partner for the Czech Republic (37%) and Slovakia (24%), but in fact non-existent for Poland. Only 1% of Polish respondents mentioned Austria as one of their three choices. On the contrary, France was considered as one of the three most important partners by 53% of the Polish, 42% of the Slovak, 25% of the Czech and just 10% of the Hungarian respondents. The United Kingdom was considered an important partner by nearly half of the Polish respondents, one-fifth of the Hungarian, 16% of the Czech and only 4% of the Slovak respondents.

The **data on allies and quality of relationships show even sharper differences within the Visegrad Group**. France is regarded as a close ally by nearly one quarter of Slovak respondents, but only by 3% of Polish, 2% of Czech and 1% of Hungarian respondents. France is therefore considered as the fifth closest ally of Slovakia, just behind Germany and the other Visegrad Group countries. The quality of relationship with France received an average rating of 2.2 in the Slovak case, which was slightly better than the Czech number (2.7). Noticeably less favourable are relations according to Hungarian and Polish respondents: 3.3 and 3.7 respectively. As in the German case, the perceived quality of relationship dropped in the French case in all V4 countries when compared to 2015. The most visible deterioration happened in the views of Hungarian and Polish respondents.

Austria was mentioned among the closest allies by Czech (22%), Slovak (15%) and Hungarian (7%) respondents, but not at all by Polish ones. **Czechs and Slovaks also considered relations with Austria rather good** with an average rating of 2.2 and 2 respectively, whereas Polish and Hungarian respondents considered them neutral.

The United Kingdom was selected among one of the three closest allies by 36% of the Polish respondents, but just by 14% of Czechs and Hungarians, and only 5% of Slovaks. Despite the fact that the **United Kingdom is considered to be a close ally of Poland, relations are not viewed as problem-free**, since the relationship got an average mark of 2.6.

Interestingly, **not many further EU members** – apart from the above mentioned and the Visegrad Group itself - **were highlighted as partners or allies**. Only in the Polish sample, three other countries were considered as one of the three most important allies by more than 10% of respondents. They were Romania (23%), Croatia (15%) and Lithuania (12%). The EU's southern flank was neglected and relationships with Italy and Greece got a neutral rating in the V4's average (3 and 3.1).

- ➔ **Visegrad Group countries do not share a perspective on extra-V4 allies in the EU.** Rather than forming two groupings (i.e. the Czech Republic and Slovakia on the one hand, and Poland and Hungary on the other), opinions are mixed.
- ➔ Czechs regard Austria as a close ally, Poles are oriented toward the United Kingdom and Romania, and Slovaks singled out France as a relevant ally.

➔ Poles and Hungarians perceived the **quality of relationship with Western European Member States as worse** than the Czech and Slovak respondents.



FRANCE, UNITED KINGDOM AND AUSTRIA AS PARTNER AND ALLY %

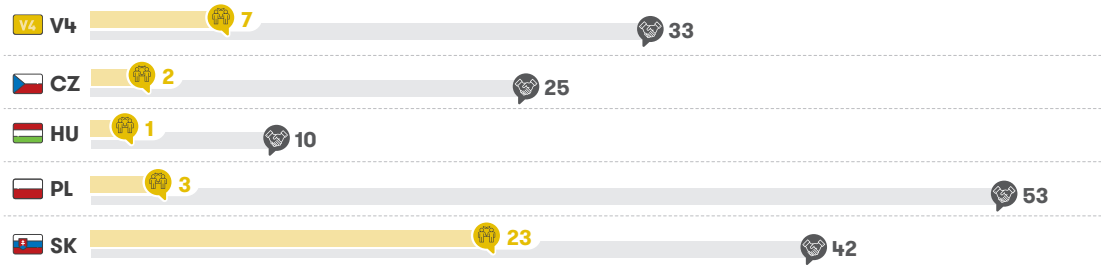
Share of respondents who picked **France** as one of the three closest allies of their country in the EU.

ALLIES



PARTNERS

Share of respondents who picked **France** as one of the three most important partners of their country in the EU.



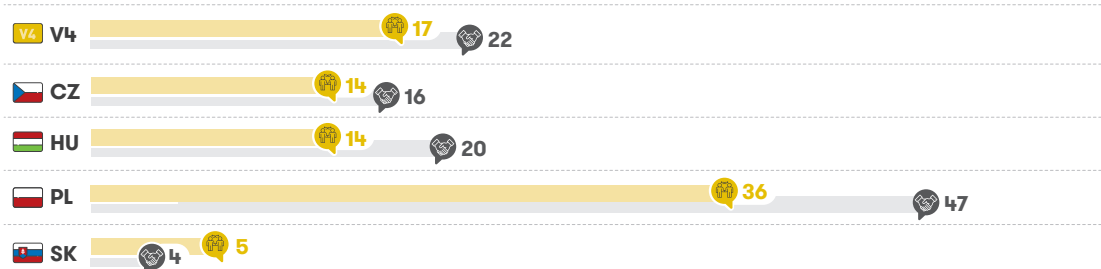
Share of respondents who picked **United Kingdom** as one of the three closest allies of their country in the EU.

ALLIES



PARTNERS

Share of respondents who picked **United Kingdom** as one of the three most important partners of their country in the EU.



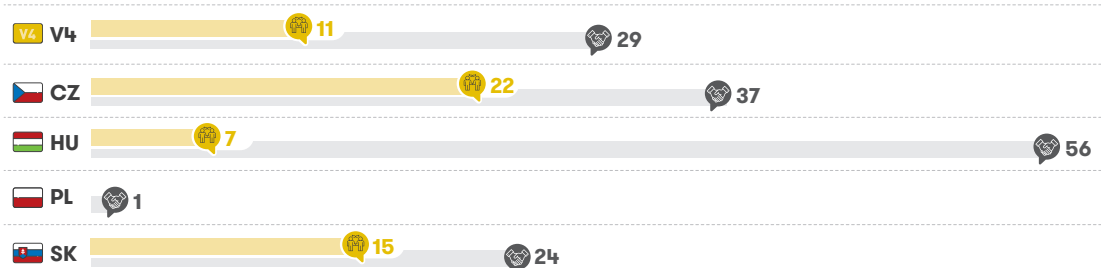
Share of respondents who picked **Austria** as one of the three closest allies of their country in the EU.

ALLIES



PARTNERS

Share of respondents who picked **Austria** as one of the three most important partners of their country in the EU.



The **intra-Visegrad relations seem to be very strong** at first sight. The four countries **ranked each other as close allies**. Respondents from all four countries resolutely rejected the idea **that their country should leave the V4**. However, a **closer look is needed** into the relationships in the V4 as attachments are not always mutually shared.

The Czech Republic is seen as an important partner and a close ally in Slovakia and vice-versa. Poland, as the biggest country, is perceived as a rather important partner in Hungary (65% of the respondents mentioned it as one of their three choices), less so in the Czech Republic (42%) and not much in Slovakia (22%).



Hungary scored as the least significant partner in other V4 countries. On the other hand, **Hungarian respondents very often selected the remaining Visegrad Group countries as their closest allies.** Slovakia made it into the three most important allies for 79% of the Hungarian respondents, Poland for 97% and the Czech Republic for 63%. To the contrary, Poland is the least “nested” in the V4, as the results show. Polish respondents stressed their alliance with Hungary, but Czechs and Slovaks are seen as less relevant allies. Czech-Slovak relations are mutually perceived as excellent. On the other hand and despite the often repeated impression, **the perception of mutually positive Polish-Hungarian relations is not reflected with particularly outstanding figures.** Comparison with data from 2015 shows that the perception of relations with Hungary improved in the eyes of respondents from Slovakia, the Czech Republic and Poland; from an average of 2.5 in 2015 to 2.2 in 2017.

- ➔ Visegrad Group countries consider themselves as **very close allies and hold that mutual relations are on a good level.**
- ➔ **Hungary is the most “nested”** in the Visegrad Group in terms of alliances, and **Poland has a visible tendency to seek allies outside the Visegrad Group.**
- ➔ **The Czech-Slovak** ties are the only ones which might be considered outstanding.



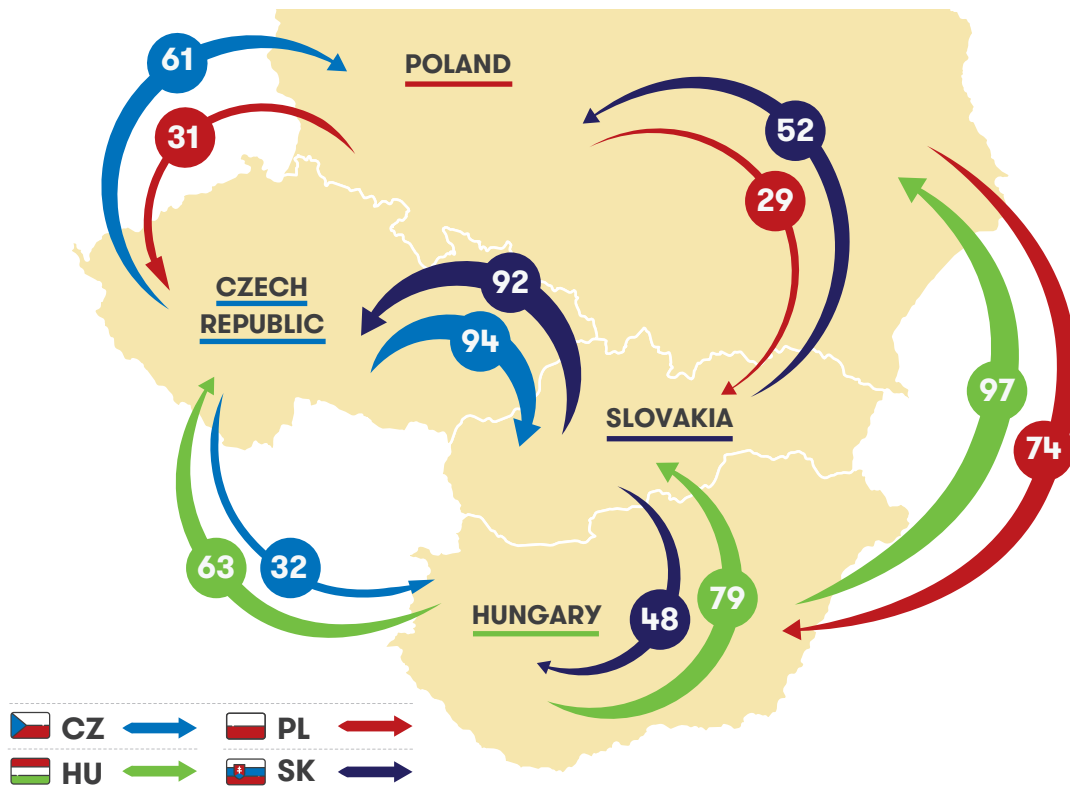
INTRA-VISEGRAD RELATIONS

%

The number shows the share of respondents who picked a particular country in the questions:



PLEASE SELECT THREE COUNTRIES WHICH, IN YOUR OPINION, ARE THE CLOSEST ALLIES FOR [YOUR COUNTRY] IN THE EU.





QUALITY OF INTRA-UISEGRAD RELATIONS



Average of the ratings the country received from the other three Visegrad countries in the question:



EVALUATE THE QUALITY OF [YOUR COUNTRY'S] RELATIONS WITH THE SELECTED EU COUNTRIES ON A SCALE OF 1 TO 5.



Three main conclusions might be drawn from this section. Firstly, the Visegrad Group is inwardly focused. The **Visegrad Group members see each other as close allies with good mutual relations.** Secondly, they share the view that **Germany is an important partner,** but are divided on the issue of whether Germany constitutes a close ally with whom the countries enjoy good quality relations – this applies to the Czech Republic and Slovakia; to a lesser extent to Hungary and not at all to Poland. **Perspectives on relations with EU Member States vary a lot** among the Visegrad Group countries.



The prospects of EU governance

The prolonged economic crisis, the refugee and migration crisis as well as the outcome of the Brexit referendum have all provided ample reason to rethink EU governance, and the 60th anniversary of the signing of the Rome Treaty in March 2017, a suitable symbolic milestone to lay out a plan. Nevertheless, in the turbulent climate of an election-filled year, **the approaching end of 2017 still finds the European Union with competing ideas, unclear prospects and persistent divisions.** Following the ambitious, albeit highly unattainable, proposals of the European Parliament in February 2017, the European Commission presented its White Paper on the Future of Europe in March with five scenarios ranging from deconstructing everything but the Single Market to moving ahead in a federalist direction by doing much more together. The middle-ground, the idea of **a European Union of multiple speeds, had been long contemplated** and has since been picked up, by among others, the recently elected French President, Emmanuel Macron, as well. Amidst the competing visions, **the Visegrad Group also presented a joint position as early as September 2016** at the Bratislava Summit hosted by Slovakia during its EU Council presidency. However, **developments since then suggest that instead of going in one common direction, the Visegrad countries have different preferences** after all: while the incumbent governments of Hungary and Poland would like to see an EU of strengthened Member States operating on an intergovernmental foundation, Prime Minister Robert Fico has just recently expressed his commitment to make Slovakia part of the EU's core as the only Central European country also a member of the Eurozone. Shortly after the Czech parliamentary elections of October 2017, the new official direction of Prague is still unclear. The present section will discuss the **expectations of the Visegrad countries' elites concerning the reform of EU governance**, which institutions they expect to become important, and their assessment on the potential impact on their countries of the five scenarios outlined in the White Paper.

First and foremost, it is important to note that all four countries' stakeholders almost unanimously agree that their countries' **being in the European Union is more beneficial than any other potential form of cooperation** they could achieve with the EU. However, **stakeholders have doubts if their countries can define their interests** in the Union. Only 31% of the Czech, 49% of the Polish and 51% of the Hungarian respondents thought that their governments were able to articulate the interests of their country well at least to some extent in the EU, and **even less thought that they were able to achieve them** (a mere 14% of the Czechs, 44% of the Poles and 41% of the Hungarians). **Slovakia stands out as a counter-example:** an impressive 85% of the respondents agreed at least somewhat that the country can define its interests and 71% perceived its performance in achieving them successful. The dissatisfaction with the limited success in asserting their interests in the EU does not couple with a wish to open the fundamental treaties to change the institutional setting in the case of the Czech Republic and Poland, therefore one could suppose that the stakeholders do not necessarily blame the current set-up of the EU for the shortcomings. However, the EU-policy community of Hungary is strongly divided on the question: 46% think that Hungary should aim for opening the fundamental treaties, while 44% oppose such at-



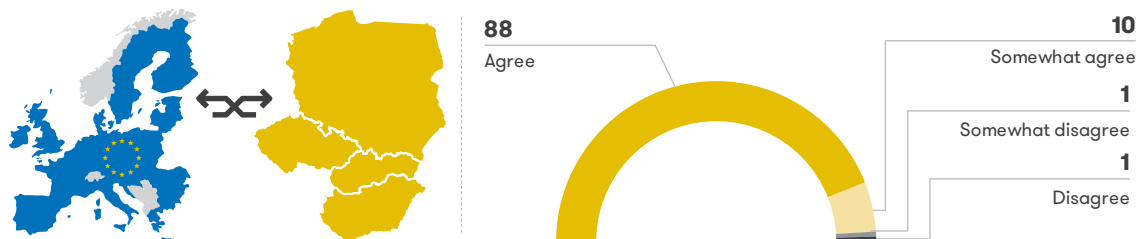
tempts. Similarly, 48% believe that EU institutional reforms will become more important for Hungary in the next five years. Numbers are similar in the Czech Republic and Slovakia, where 49% and 51% of the respondents expect that EU institutional reforms will be higher on their countries' agendas in the next five years than they are now. In Poland, however, 65% of the respondents think that this topic will feature higher on the national agenda, which is even more interesting given that only 26% think that Poland should aim for institutional reforms by opening the treaties.

- ➔ **Visegrad elites do not question their countries' membership in the European Union.**
- ➔ Except for Slovakia, **respondents are generally dissatisfied with the performance of their countries** in articulating and achieving their interests in the EU.
- ➔ **In no country does the majority support the opening of the EU treaties**, but on average **the majority expects EU institutional reforms to be higher on the EU and the countries' EU-policy agenda** in the next five years.

EU MEMBERSHIP %

TO WHAT EXTENT DO YOU AGREE WITH THE FOLLOWING PROPOSITION? (V4 average)

➔ **EU MEMBERSHIP IS MORE BENEFICIAL TO [YOUR COUNTRY] THAN ANY OTHER FORM OF RELATIONSHIP WITH THE EU.**



The general impression concerning the **Visegrad position** is that the group seeks the **emergence of an EU of Member States** where **decision-making is intergovernmental** and **sovereignty lies with the capitals**. This would naturally entail granting more power to the European Council and less to the European Commission, the Parliament and the Council of the European Union. But the individual countries' reality is more nuanced than the perceived joint position, thus it is worth reviewing what changes policy elites expect in the **importance of the common institutions of the EU**.

The survey results show that on average **4 to 5 respondents in 10 do not expect any change**. Those who do, anticipate rather a **strengthening importance for all institutions** mentioned in the survey. On average, 47% of the respondents from the four countries expect the **European Council** to at least somewhat strengthen its importance in the next five years, whereas only 6% think that its importance will weaken at least somewhat. At the same time, on average only 39% expect that the **European Commission's** and the Council of the EU's importance will rise, while 18% on average anticipate that the Commission's importance will drop. The **European Parliament** is somewhere in between: 43% on average expect a rise and 12% a drop in its importance. While the individual countries' positions are generally balanced reflecting the above

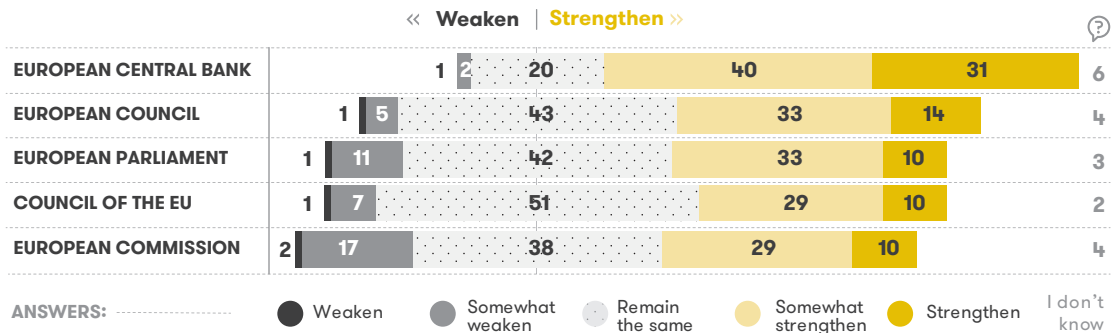


anticipated trends, the Czech Republic stands out with more pronounced views. Here, as much as 53% of the respondents expect that the European Council will become more important, thus move into an intergovernmental direction, and only 30% think that the European Commission or the Council of the EU could gain more relevance. In fact, every fifth Czech respondent (22%) expects the Commission to lose out. 24% of the Hungarian respondents hold a similar view.

IMPORTANCE OF EUROPEAN INSTITUTIONS %



IN YOUR OPINION, HOW WILL THE IMPORTANCE OF THESE EUROPEAN INSTITUTIONS CHANGE IN THE COURSE OF THE NEXT FIVE YEARS? (V4 average)



A frequent theme of recent times has been the **future of the Eurozone**. Except for Poland, the V4 countries believe that its development will feature higher on the European agenda in the next five years than now: 70% of Hungarian, 78% of Slovak and 87% of Czech respondents think so, while only 34% of Poles shared this opinion. On average 7 in 10 respondents also think that **the European Central Bank's importance will increase** in the next five years. Interestingly, however, positions vary whether Eurozone development is expected to become more important on the national agenda and especially if the countries should adopt the Euro. **73% of Czech respondents think that their country should introduce the Euro** and 76% expect the topic of the Eurozone to feature higher in domestic politics in the coming years than it has done until now. On the contrary, while **73% and 68% of Hungarian and Polish respondents respectively think that their countries should introduce the common currency**, only 43% and 34% respectively think that the reform of the Eurozone will become increasingly important in national discussions in the coming five years. **Slovak respondents appear to be satisfied with being in the Eurozone: 98% would oppose an exit.**

- ➔ The biggest shares of respondents from all Visegrad states **do not expect significant changes in the importance of the common EU institutions** in the next five years.
- ➔ Among the four core institutions of EU governance, **the European Council's importance is expected to strengthen** in the next five years by the largest share of respondents (47%) on average, while **the European Commission's is expected to weaken** (18%).
- ➔ **In the Czech Republic, Hungary and Poland a stable majority thinks that the Euro should be introduced**, while almost **all Slovak respondents are satisfied with their country having the common currency.**

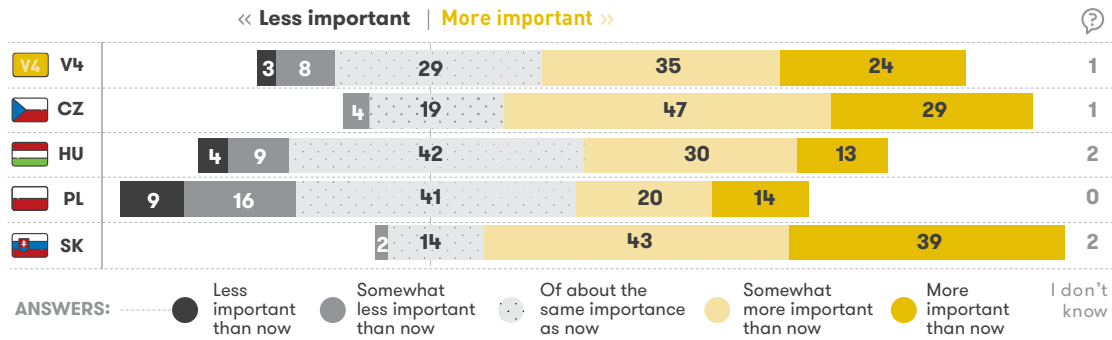


IMPORTANCE OF THE DEVELOPMENT IN THE EUROZONE

%



IN YOUR OPINION, HOW IMPORTANT WILL THE DEVELOPMENT OF THE EUROZONE BE FOR [YOUR COUNTRY'S] EUROPEAN POLICY IN THE COURSE OF THE NEXT FIVE YEARS?



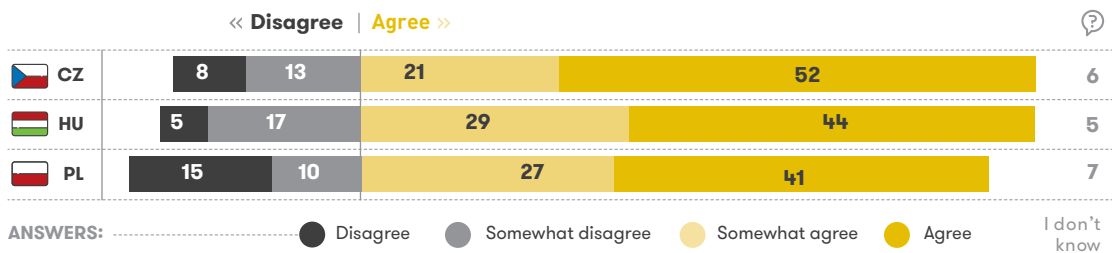
MEMBERSHIP IN THE EUROZONE

%



TO WHAT EXTENT DO YOU AGREE WITH THE FOLLOWING PROPOSITIONS ABOUT THE ROLE OF [YOUR COUNTRY] IN THE EU?

→ [YOUR COUNTRY] SHOULD JOIN THE EUROZONE BY 2025.



→ SLOVAKIA SHOULD LEAVE THE EUROZONE.



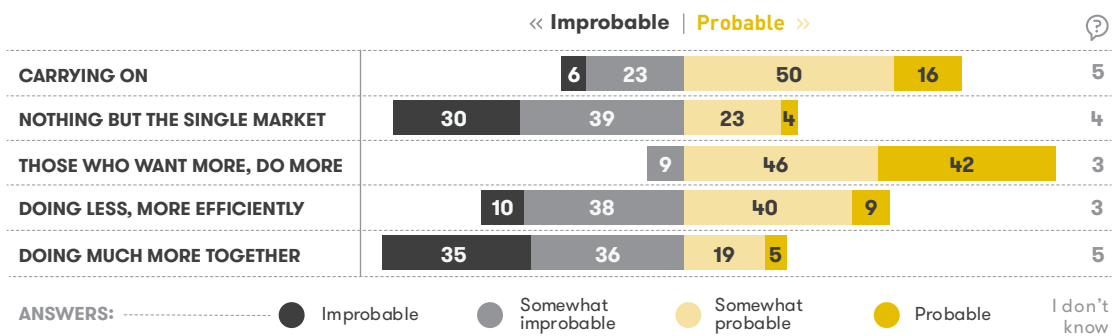
To assess what directions of overall development respondents expect and whether they would view them as beneficial for their countries, the survey relied on the five scenarios presented in the **European Commission's White Paper on the Future of Europe** as starting points. In all four countries, most respondents picked the scenario of those wanting to do more doing more, that is the **multispeed Europe scenario (No.3)** as the **most likely one to materialize** (88% on average) followed by the **EU just carrying on** with the current format (No.1, 66% on average). The **least likely two scenarios** in all countries were the **EU doing more together** (No.5, 24% on average) or the prospect of **returning only to the Single Market** (No.2, 27% on average). Interesting differences appeared when respondents assessed how beneficial the individual scenarios would be for their countries. While in the Czech Republic, Hungary and Poland doing more together (No.5), a scenario expected to be unlikely, or doing less but more efficiently (No.4) were picked as at least somewhat beneficial by the highest proportions of re-



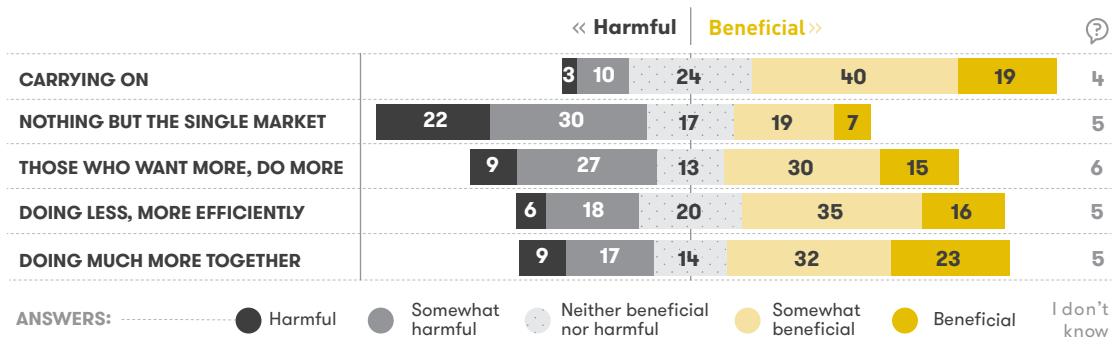
spondents, in Slovakia, carrying on (No.1) and in fact multispeed Europe (No.3), the two scenarios judged most likely, were the ones seen as at least somewhat beneficial by the largest shares of respondents. At the same time, the most likely, multispeed Europe alternative received the largest opposition among Polish respondents: 59% considered it at least somewhat harmful for Poland. Overall, **the most negatively viewed scenario in the V4 is the return to the Single Market (No.2.)**, which is considered harmful by 52% of the respondents on average in the four countries (58% in the Czech Republic, 42% in Hungary, 57% in Poland and 53% in Slovakia). **While the countries' elites consider the development of a multispeed Europe a realistic probability, they do not agree that the V4 could be an alternative to the EU core for their countries.**

WHITE PAPER ON THE FUTURE OF EUROPE %

IN YOUR OPINION, HOW PROBABLE ARE THE INDIVIDUAL SCENARIOS OF THE EUROPEAN COMMISSION'S WHITE PAPER ON THE FUTURE OF EUROPE TO MATERIALIZE? (V4 average)



IN YOUR OPINION, HOW BENEFICIAL WOULD THE INDIVIDUAL SCENARIOS OF THE EUROPEAN COMMISSION'S WHITE PAPER ON THE FUTURE OF EUROPE BE FOR [YOUR COUNTRY]? (V4 average)



- ➔ Visegrad countries' elites consider the scenario of a **multispeed Europe the most likely** to materialize, but **except for Slovakia, they all view it as harmful** for their countries. **Slovak respondents rather consider it beneficial.**
- ➔ **Doing much more together is considered probable by the least respondents, yet among Czechs, Hungarians and Poles, this is considered as a beneficial possibility** for their countries.



Visegrad cooperation is in practice largely about forming various coalitions on the EU's sectoral policies. Meetings of ministerial experts and fine-tuning of joint positions is Visegrad daily practice and a standard part of the itinerary of each V4 Presidency. In the past, the Visegrad Group was able to **represent a common position** and so to achieve successes in the EU Council negotiations. Since its accession to the EU, the V4 has played an important role in the debates on climate and energy related issues, transport policies, negotiations of the EU's multiannual financial framework, cohesion policy, or recently, the double-standards of food products. Moreover, the Visegrad Group's position has often become a **starting point for a broader coalition** of Central and Eastern European EU Member States.

There were several questions related to EU sectoral issues in the questionnaire. Firstly, we asked about the importance of selected issues for the respondents' country's European policy in the course of the next five years. Similarly, we enquired whether in the respondents' opinion the same issues would be important for the European Union in general in the course of the next five years. Moreover, we asked in an open question what three policy areas the Visegrad Group should focus on in the future. Respondents also rated whether various potential developments of the Single Market would be beneficial or harmful for their country. Last but not least, there were questions related to the next Multiannual Financial Framework. Respondents were asked to select three areas which should be prioritized when deciding about the division of EU funds for the next programming period starting in 2021.

Data gained from these questions may help us to shed light on the **potential of the Visegrad Group to cooperate in sectoral policies in the future**, or in other words, to compare and contrast expectations and priorities as seen by important V4 decision-, policy- and opinion-makers.

Respondents from all Visegrad countries were of the opinion that the **deepening of the Single Market would be beneficial for their country**. On average as much as 86% of them held this view. 48% also thought that the issue of the Single Market would become more important for the EU and 47% that it would be at least about as important as it is now in the course of the next five years. Similarly, on average around 75% of them would welcome further **liberalization in the energy and services sectors**. Only Hungarian respondents were a bit more sceptical with only 62% of them sharing this opinion. Likewise, on average 75% of respondents stated that any restrictions on labour migration within the EU would be harmful for the V4 countries.

In each sample, there was a **division on the issue of the possible introduction of a single corporate tax rate and the harmonization of social policies**. Mainly Slovak respondents – 52% of them – were keen on tackling social dumping through further harmonization of social legislation.

➔ Visegrad Group countries would like to see further **deepening of the Single Market**.



- Respondents were split on whether further integration in tax and social policies would be beneficial or harmful for their countries.
- There were **no major differences in the opinions coming from the Visegrad Group countries concerning the single market.**



FUTURE IMPORTANCE OF THE SINGLE MARKET

%



IN YOUR OPINION, HOW IMPORTANT WILL THE SINGLE MARKET BE FOR THE EU IN THE COURSE OF THE NEXT FIVE YEARS?

« Less important | More important »



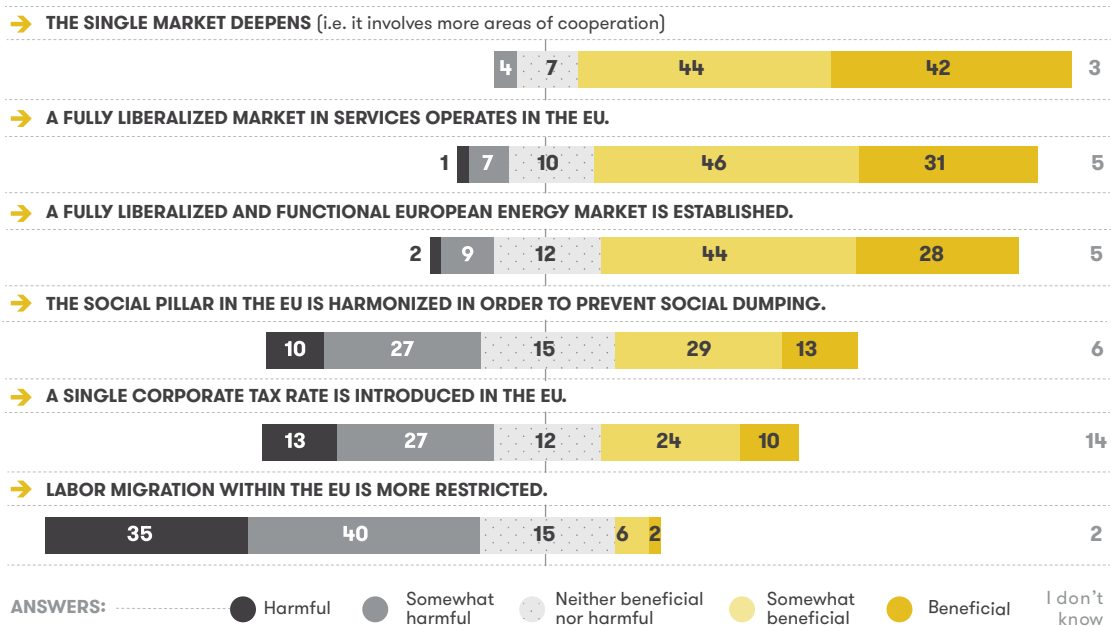
POTENTIAL DEVELOPMENTS OF THE SINGLE MARKET

%



IN YOUR OPINION, HOW BENEFICIAL WOULD THE FOLLOWING POTENTIAL DEVELOPMENTS OF THE SINGLE MARKET BE FOR [YOUR COUNTRY]? (V4 average)

« Harmful | Beneficial »



It is interesting to compare, which sectoral policies respondents expect to become more important for the EU and for their country in the future. Respondents claimed that **energy, cohesion and digital** policy will be more important for their countries in the five-year outlook. They also believed that energy policy and the digital agenda will be more important for the EU as a whole, but were more **sceptical regarding cohesion policy** (only 37% of them in the V4's average shared that opinion). Energy policy and cohesion policy were **also often mentioned among the most important areas that the Visegrad Group should focus on**, as they were mentioned as one of the three options in an open question by 30% and 24% of respondents on average. Yet, the digital agenda was seen as the V4's potential priority only by Czech respondents (17% remarked on it), and not that much by the others (only 7% on average).



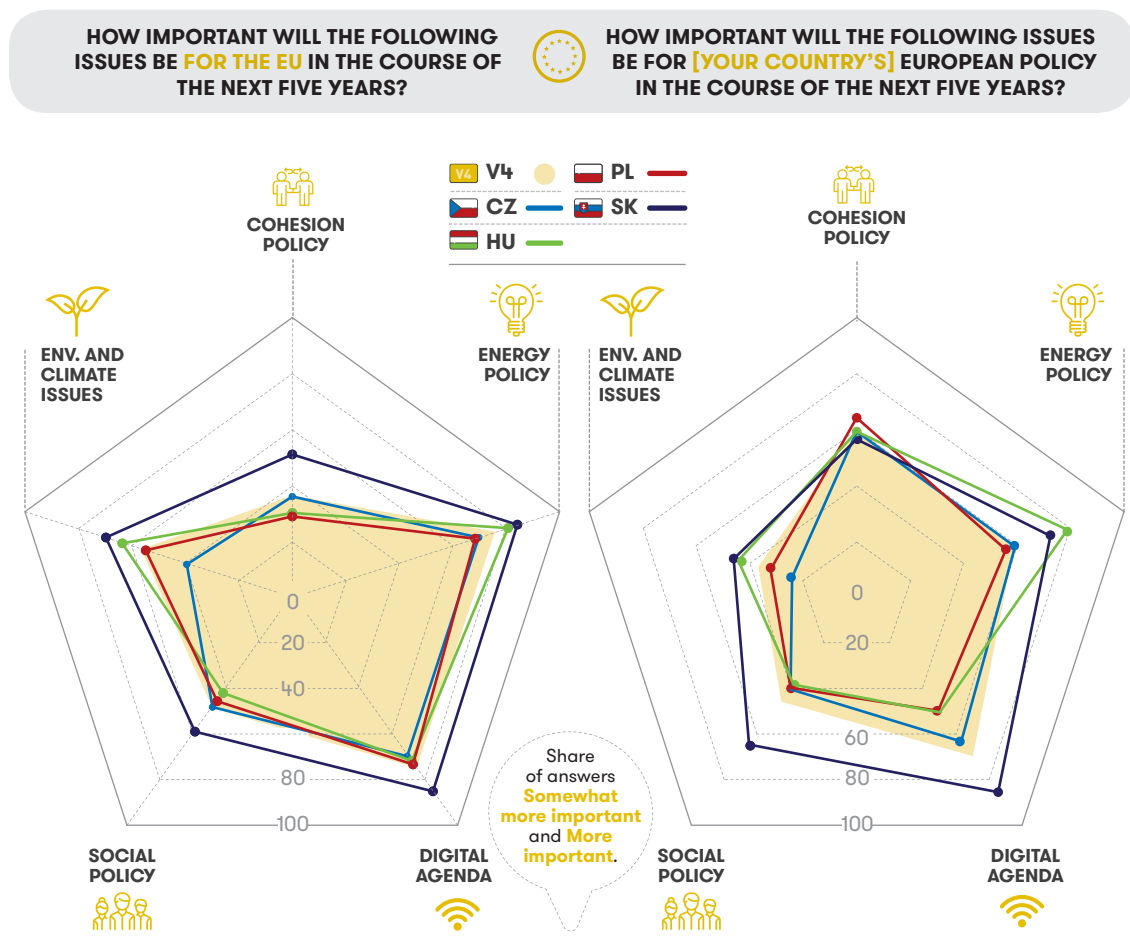
On the other hand, they thought that the significance of environmental and climate policy would rise, although it would not be the centre of attention for the V4 countries; especially not for the Czech Republic as its respondents stated. Respondents from **Slovakia**, the only Eurozone member of the Visegrad Group, believed that **social policy will become more important for their country and for the EU as such**. This could be understood as a reflection of the current debates on the future of the Eurozone where convergence of social policies also has its place.

- ➔ Respondents stated that **cohesion, energy and digital policies will be more important issues for their countries' EU policy** in the course of the next five years than they are now.
- ➔ They expect that the **significance of digital and energy policies will also rise on the EU level**. However, in their opinion that **will not be the case for cohesion policy**.
- ➔ Climate and environmental issues are expected to become more important for the EU, but not for the V4 countries.
- ➔ The **views from the V4 countries were quite similar**, only Slovak respondents thought that social policy will be more important than now for their country and for the EU in the next five years.



IMPORTANCE OF SELECTED ISSUES FOR THE V4 COUNTRIES

%





Last but not least, we examined preferences concerning the **allocation of the EU's financial resources in the next multiannual financial framework**. In general, respondents think that funds should go into **science, research and innovation** (selected as one of the three categories by 68% of the respondents on average in the V4). However, there were differences among the responses from individual V4 countries. Czech and Slovak respondents would like to use EU funds for the development of their **infrastructure** (64% and 57% mentioned it respectively as one of the three priority areas) more than Polish (38%) and Hungarian respondents (22%). At the same time, transport and infrastructure was also identified as a key policy area that the Visegrad Group should focus on, as it was selected by 26% of respondents as among the three most important priorities for the Group for the future. Hungarian, Slovak and Polish respondents were of the opinion that there is a need to help the **least developed regions with the use of EU funds**. In all cases, the issue was selected by around 40% of respondents. Czech, Hungarian and Slovak respondents would like to focus on **education** as 58%, 69% and 64% respectively selected this issue. Moreover, in the Polish and Hungarian sample, unlike in the Czech and Slovak cases, the view was held that EU resources should also support **small and medium enterprises**. Interestingly, agriculture and rural development did not make it into the top priorities of any of the four countries.

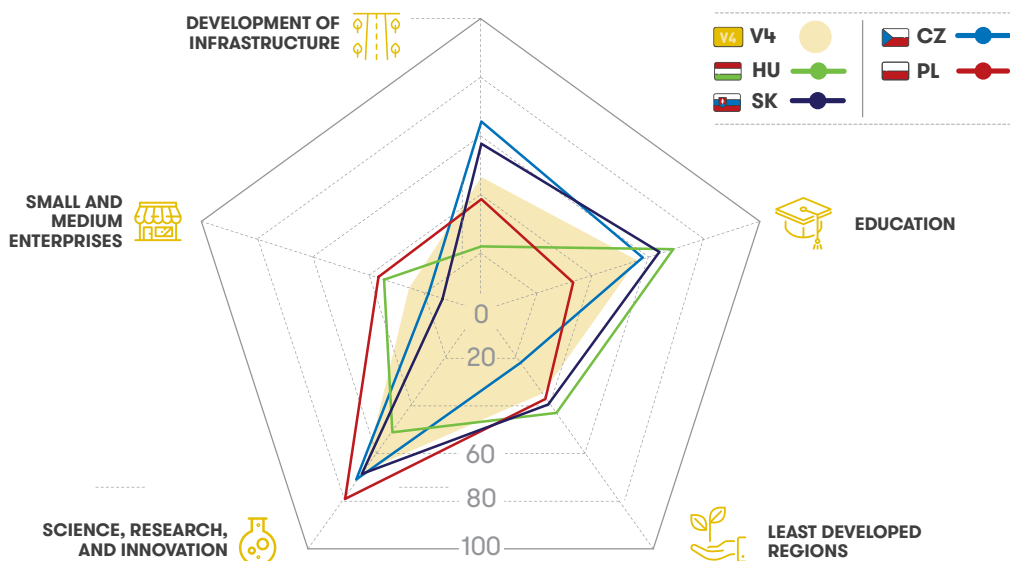
- ➔ Respondents from all Visegrad Group countries **shared the view that funds from the EU's next multiannual financial framework should primarily be directed into science, research and innovation**.
- ➔ There were differences in other areas, but very often three or at least two V4 countries shared common positions, which **should make coalition-building possible among the V4 during the negotiations of the next multiannual financial framework**.



PRIORITY AREAS FOR THE NEXT MULTIANNUAL FINANCIAL FRAMEWORK %



IN YOUR OPINION, WHICH THREE AREAS SHOULD BE PRIORITIZED IN [YOUR COUNTRY] WHEN DECIDING ABOUT THE DIVISION OF EU FUNDS FOR THE PERIOD STARTING WITH 2021? (SELECT THREE AREAS)



Selected aspects of EU external affairs



Migration and asylum policy as well as **security and defence cooperation** both featured high on the EU's agenda over the past year, and in the V4 an overwhelming majority anticipates that **both will become at least somewhat more important on the EU agenda** in the next five years (83% and 82% respectively). Concerning the countries' own EU policies, on average 66% of the respondents believe that migration and asylum policy will become even more important than it is now – which is significant considering how central it has already been over the past two years. A similarly high number, on average 65% of the V4 respondents, believe that Common Foreign and Security Policy (CFSP) and Common Security and Defence Policy (CSDP) will become more prominent on their countries' EU agenda. The survey posed various questions concerning preferences of addressing the refugee crisis, asked what respondents anticipate concerning the development of relations with the US in the field of security and defence, how they view the current form of CSDP and what they expect from the newest developments in the field. This section will briefly review the average Visegrad positions on these matters and will highlight the biggest differences among the four countries.

The Visegrad Group's position on the **refugee and migration crisis** has elevated the block's profile in the EU, but also contributed to the perception that it is essentially a protest group. The Visegrad governments' **opposition to the refugee relocation quota** is widely known. The Czech Republic, Hungary and Slovakia voted against the scheme in September 2015 and the latter two turned to the European Court of Justice questioning the Council decision, which passed relocation with a qualified majority. The present survey asked stakeholders, still before the Court decision was published in September 2017, if they agree that their **country should accept asylum seekers through some kind of relocation scheme**. On average, **55% agreed at least somewhat**, this however covers up the differences among the V4. Whereas close to 60% of Czech, Polish and Slovak respondents expressed some level of agreement with the statement, among Hungarians it did not receive a majority (48%). **Support for alternative forms of contributions to the resolution of the refugee crisis instead of taking refugees** were highest among Czech and Slovak respondents (80% and 82% respectively), but still most Hungarian and Polish respondents would find this path acceptable (69% and 63% respectively). Despite their overall opposition to relocation, the elites of the four countries are **united in opposing their countries negotiating an opt-out from the EU's common migration and asylum policy**. Only 23% would be in favor of that in all countries.

Even though migration was the issue which gave a new momentum to the Visegrad Group two years ago, when asked in **what three areas the V4 should cooperate in the future, migration and asylum policy** – although it featured highly – was **not among the most frequently mentioned** policy areas. On average, 20% of respondents mentioned it, with only 12% of Slovaks at one end of the scale, and every fourth Hungarian (24%) at the other.



- ➔ While Visegrad governments opposed the EU relocation quota, the policy elites have a more divided position. Except for Hungary, **the majority of all countries' respondents agreed at least somewhat that they should take part in some form of relocation. Alternative forms of contributions also have a wide support.**
- ➔ **Migration and asylum policy is not among the most frequently cited policy areas** where stakeholders suggest the Visegrad Group should cooperate.

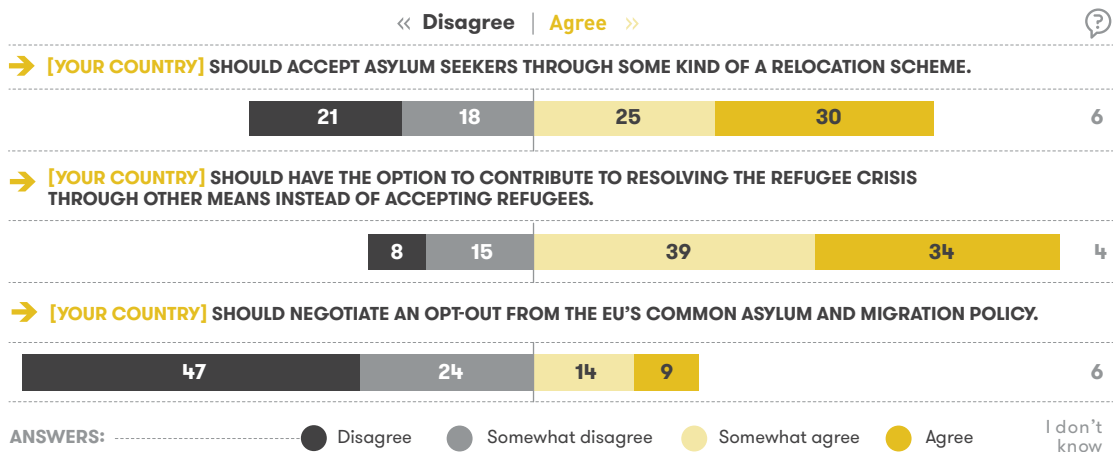


EU ASYLUM AND MIGRATION POLICY

%



TO WHAT EXTENT DO YOU AGREE WITH THE FOLLOWING PROPOSITIONS ABOUT THE EU'S ASYLUM AND MIGRATION POLICY? (V4 average)



Despite all its downsides, the prospective exit of the United Kingdom from the European Union raised hopes for progress in the field of **security and defence cooperation** already in summer 2016. Furthermore, the election of US President Donald Trump sounded the alarm bells across the EU raising awareness about European NATO members' reliance on the US, which might not prove to be such a stable ally in the future. Following the presentation of the European Global Strategy, the EU with High Representative Federica Mogherini in charge set out to develop plans for deepening cooperation in the field of security and defence, especially concerning the use of the EU Battlegroups, as well as the launch of the permanent structured cooperation (PESCO), and the future harmonization and boosting of European defence capabilities. To serve the latter purpose, the European Commission launched the European Defence Fund in June 2017 with a yearly budget of 5.5 billion euro. Conducted after these concerns were already on the table and developments under way, respondents' positions were expected to reflect these trends.

The survey results suggest that **Visegrad elites do not fully share concerns in the EU related to President Trump's approach to security cooperation with Europe.** On average, 46% of the respondents think that **EU-US relations in the field of security and defence cooperation will not change much**, but still on average 29% expect deterioration and only 22% improvement. In this regard, Czechs are the most pessimistic among the four, with 35% of the respondents expecting deterioration, and Hungarians the most optimistic with 28% expecting improvement. On the bilateral level, countries vary significantly. In all cases, less than 20% of the respondents expect deterioration in bilateral

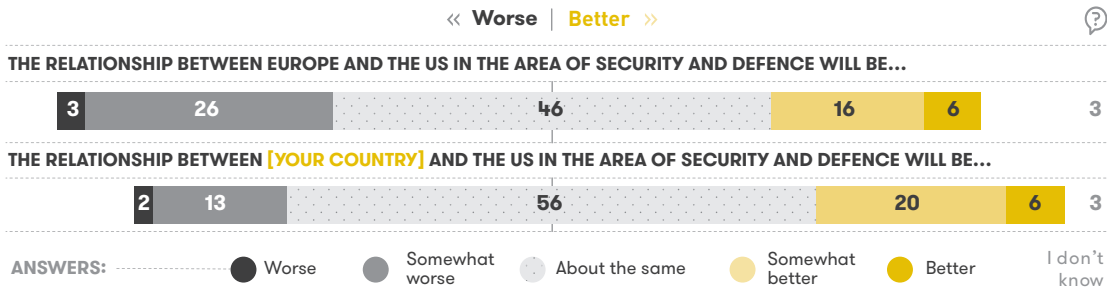


security and defence cooperation with the US, but the optimism of Polish respondents is significantly above everyone else's. 45% of Polish respondents think that Polish-US security and defence ties will improve in the next five years, while these numbers are just at 24% in the Hungarian, 22% in the Slovak and 12% in the Czech case.

FUTURE OF TRANSATLANTIC RELATIONS %



IN YOUR OPINION, WHAT WILL TRANSATLANTIC RELATIONS LOOK LIKE IN THE FOLLOWING AREAS IN THE COURSE OF THE NEXT FIVE YEARS? (V4 average)

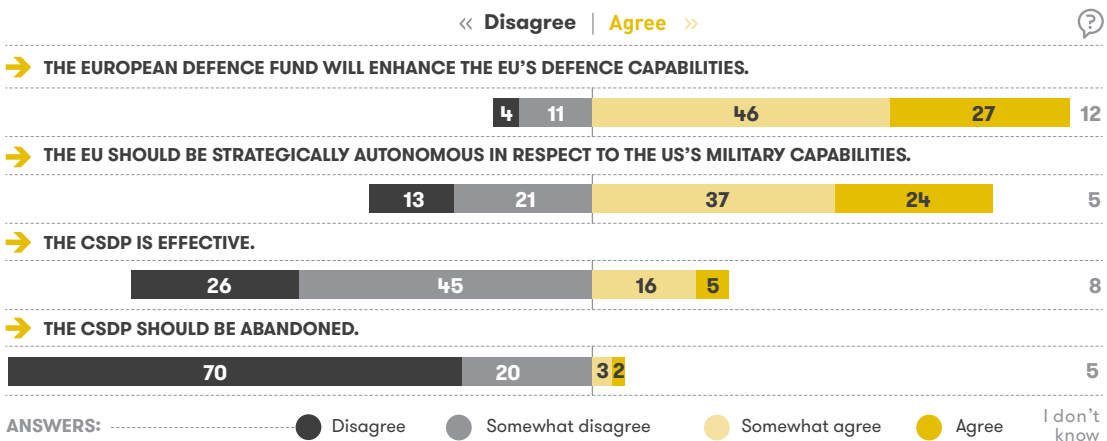


As Visegrad countries are not strongly concerned by worsening relations between the EU and the US in these fields, the fact that on average 62% of respondents think **the EU should become strategically independent from the US** is likely more motivated by the EU's own role in world affairs and its significant lack of capacity than by fears of dependence on the Trump administration's approach to the EU. Indeed, on average **only every fifth respondent considers the current form of CSDP effective**. On the national level, perceptions vary: while Poland and Slovakia are around the average, only 6% of Hungarian respondents consider the policy effective, whereas 34% of the Czechs agree at least somewhat that the CSDP serves well. This might explain why the proportion of those who think the EU should be strategically autonomous is highest among the Czechs – they have a stronger foundation to believe it is possible. Despite the dissatisfaction, on average **90% of the respondents do not want to abandon the CSDP**. 73% are hopeful that the European Defence Fund will prove effective in enhancing the EU's defence capabilities.

CSDP OF THE EU %



TO WHAT EXTENT DO YOU AGREE WITH THE FOLLOWING PROPOSITIONS ABOUT THE CSDP OF THE EU? (V4 average)





Despite the expectation that CFSP and CSDP will be higher on the EU and the national EU-policy agenda, on average only 39% of V4 respondents expect that this would result also in the position of the **High Representative of the Union for Foreign Affairs and Security Policy and the European External Action Service** becoming more important in the next five years, while 41% do not expect changes here.

- ➔ **Visegrad stakeholders do not echo worries that bilateral or EU-US security and defence cooperation will deteriorate** in the next five years.
- ➔ They consider the **current form of CSDP ineffective**, but they do not want to abandon it.
- ➔ The **European Defence Fund is regarded as a potentially useful** new instrument by a stable majority in all four countries.

Conclusions



The goal of the “Trends of Visegrad European Policy” project was to answer **what vision – if any – the Visegrad countries hold concerning the EU, on what issues they could speak with one voice and what the main disagreements are among the four countries**. Although the returned 451 questionnaires cannot be regarded as representative and the composition of the country samples certainly influences the final results, they give an informed insight into the thinking of a significant part of the Visegrad countries’ European policy elites on the above topics.

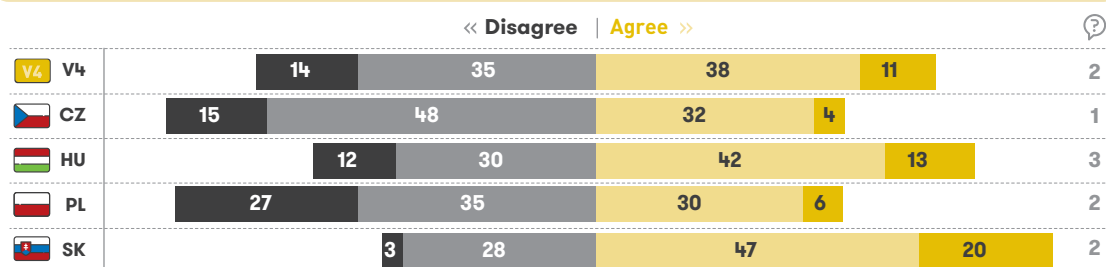
Predominantly due to the Visegrad countries’ stance in **the refugee and migration crisis, the past two years have brought unprecedented attention to the Visegrad Group** on the European level, and increased expectations concerning its performance both within the Group and among partners. At the same time, **bilateral relations with some of the key Western European partners, like Germany or France, have somewhat deteriorated** according to the respondents, and Visegrad European policy elites’ self-assessment concerning whether the V₄ has become an influential and constructive actor on the European level is also mostly modest, varying from country to country. While **on average 49% of the respondents agreed at least somewhat that the V₄ is influential in the EU**, only 36% of Czech and Polish respondents shared this view as opposed to 55% of the Hungarians and 67% of the Slovaks. A similar trend can be observed when assessing the V₄’s constructiveness. Although **on average 43% agree at least somewhat that the V₄ plays a constructive role in the EU**, only 30% of the Czech and 40% of the Polish respondents are of this opinion, whereas 48% of Hungarians and as much as 67% of Slovaks agree at least somewhat.

VISEGRAD GROUP IN THE EU %

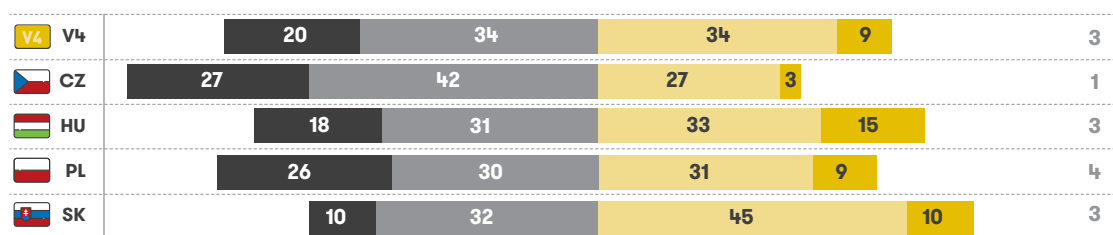


TO WHAT EXTENT DO YOU AGREE WITH THE FOLLOWING STATEMENTS ABOUT THE ROLE OF THE VISEGRAD GROUP IN THE EUROPEAN UNION?

→ THE VISEGRAD GROUP IS AN INFLUENTIAL ACTOR IN THE EU.



→ THE VISEGRAD GROUP PLAYS A CONSTRUCTIVE ROLE IN THE EU.



ANSWERS: Disagree Somewhat disagree Somewhat agree Agree I don't know



There is therefore a clear **divide between Poland and the Czech Republic on the one hand, and Hungary and Slovakia on the other concerning the V₄'s role in the EU**, which at the same time counters the frequently cited picture of a two-tiered Visegrad with the Czech Republic and Slovakia in one group, and Poland and Hungary in the other. Polish respondents' reluctance concerning the role of the V₄ is not entirely unexpected given that Poland tends to think in other regional formats as well, underlined also by Polish respondents' preference for extra-V₄ countries as important partners and allies. Similarly, stakeholders from the Czech Republic, the country that sought to distance itself somewhat from the critical image the Visegrad has acquired over the past two years, could also be expected to give a more critical assessment of the V₄'s role in the EU. Slovak respondents' positive assessment might be more unexpected, but partly the recent memory of the country's EU Presidency, partly the small size and influence of Slovakia could explain the positive outlook on the Visegrad Group's role in the EU. The Visegrad Group has received high visibility in Hungary since 2015 and even higher praise from the Hungarian government as the EU's new engine. In this light, one could argue based on the survey results that the Hungarian policy community is quite critical of the V₄'s role in the EU – even if less so than those of the other V₄ states.

When it comes to the assessment of which **alternative development paths of the EU** could be beneficial for the individual Visegrad states, another type of geometry comes into play, which, nevertheless, also underlines the importance of embeddedness in various cooperation formats for Slovakia. Being the only V₄ country that is also a member of the Eurozone, and with a 98% support happily so, **Slovak respondents are not worried about the likelihood of a multispeed Europe** gaining ground in the coming years. They also find it highly probable. On the other hand, **the same development concerns significant segments of Czech, Hungarian and Polish respondents**, who consider this scenario rather harmful and, worryingly for them, also likely. Interestingly, the stakeholders of the latter three countries are in unison in evaluating two fairly different scenarios as rather beneficial ones for their countries: “doing less but more efficiently” and “doing much more together”. Although to differing extents, both scenarios suggest deeper integration in the areas covered by the cooperation. Considering that the common image of the Visegrad Group is associated rather with a search for intergovernmentalism and giving sovereignty back to the Member States, it is interesting to see that significant parts of European policy elites in the V₄ assess these scenarios rather positively. The openness to the benefits of deepening cooperation in the EU is also reflected by all three countries showing a **stable majority in favor of the adoption of the Euro by 2025**.

All four countries' elites picked the “carrying on” and the “multispeed Europe” scenarios as probable in the largest numbers. As there are already examples of various depths of cooperation in place in different policy areas, for either of the two to materialize, institutional changes would not be strictly necessary. In this light it is understandable that the biggest proportions of policy elites in the four countries **do not expect significant changes in the importance of the core EU institutions** in the coming five years. Typically, they are also **not inclined to initiate the opening of the fundamental treaties**, although Hungary stands as an exception with a more or less equally divided sample on the issue.



Intra-Visegrad bilateral relations were typically evaluated positively by respondents, and generally they picked Visegrad partners among the most important allies. These views are also reinforced by the fact that **the four countries' European policy elites also find participation in the Visegrad Group beneficial for pursuing their countries' interests** (72% on average), although there are significant differences among the samples. 84% of Hungarian and 82% of Slovak respondents share this view, while only 58% of Czech and 61% of Polish respondents see the benefits. Nonetheless, there is a tangible desire to cooperate more closely. On average, 73% of the respondents believe the V4 should strive for joint positions more often, with Hungarian and Slovak respondents being the most enthusiastic (78% and 77% respectively), followed by the Poles (75%), and finally, the Czechs (62%). As the numbers suggest, **Czech and Polish respondents are more critical about the Visegrad Group's cooperation**, just as they viewed the V4 influential and constructive on the EU level in lesser numbers than Hungarians and Slovaks.

In what areas could cooperation be successful then on the Visegrad and EU level in the future? Although it was a clear flagship area during the past two years on the political level, **Visegrad's European policy elites do not prioritize migration policy for the future** as much as one could expect. On average, only every 5th respondent mentioned it, and enthusiasm clearly varies among the four stakeholder groups. **Energy and cohesion policy featured the most frequently** among key sectoral policy areas where stakeholders would wish to see more cooperation among the Visegrad countries in the coming years. As respondents also anticipate that these will be high on the European Union's agenda in the next five years, and with the upcoming negotiations of the next multiannual financial framework this will likely be the case, it would be indeed worth investing resources into developing common positions and coordinating priorities in both fields. Further on the EU level, the fact that all countries' **stakeholders view the deepening of the Single Market as potentially beneficial** for their countries can provide a starting point for future cooperation. As **further market integration in the energy and services sectors** are supported by stable majorities in all countries, these should be areas of coordination for further coalition building in the European Union. Similarly, maintaining a **platform in support of the four freedoms**, and most prominently the freedom of labor, in which field all Visegrad countries oppose restrictions and hold a strong interest, can be useful to argue a common position. Finally, although the Visegrad countries are not significant players in the field of security and defence policy in the European Union, they are all in favor of maintaining the EU's Common Security and Defence Policy, even if stakeholders are generally not satisfied with its current form. Considering the momentum behind the policy field on the European level, the **constructive formulation of joint positions in CSDP**, potentially even for the use of resources from the European Defence Fund that all countries' stakeholders consider beneficial, **could improve the image of the Visegrad Group in the EU** with the added benefit of furthering cooperation in a field where, anyhow, the V4 has been trying to align more in the past years.

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#V4TRENDS



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