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Policy Paper 6/2015

What do Hungarian Foreign Policy Stakeholders Think?

—
December 2015

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Introduction

Following the regime change, foreign policy received little public attention in Hungary. Before the country's EU accession, a largely consensual three-pillar set of goals dominated the official policy line: joining the institutions of the Euro-Atlantic integration, developing regional cooperation and building good neighborly relations with the seven countries surrounding Hungary, and finally, supporting Hungarian communities abroad. After a period of low-visibility self-reflection following 2004, foreign policy started to become more present in public communication and media after Hungary's EU Presidency in 2011, held during the tenure of Prime Minister Viktor Orbán. The key foundations of the Fidesz-government's vision about Hungary's place in the world were laid down in the document "Hungary's Foreign Policy after the Hungarian Presidency of the Council of the European Union",² which sought to fundamentally reshape the country's foreign policy. Instead of focusing on the Euro-Atlantic vector, the government initiated the so-called Eastern Opening to develop ties with rising powers in the East and in the Arab world. It became increasingly critical of the European Union and of Hungary's position in it. Additionally, it put unprecedented emphasis on external trade and eventually also started the so-called Southern Opening to engage in Africa and Latin America.

Due to the shift, topics of foreign policy and the country's place in the world started to be discussed somewhat more in Hungary, while the motivations and the results of the new course have received controversial evaluations both internationally and domestically. Nevertheless, by mid-2015, relations have objectively worsened with the European Union as well as with the United States of America (except in the field of defense where Hungary maintained its limited but consistent position) where a low came in the end of 2014. At the same time, Hungary is often perceived as cultivating too close relations with Russia, which, in the midst of the war in Ukraine, unavoidably draws substantial international criticism. Hungarian responses to the refugee and migration crisis, which unfolded in 2015 and caught the European Union unprepared, also divided observers. But the gradually evolving position of the Visegrad countries (the Czech Republic, Hungary, Poland and Slovakia) seem to have brought the group closer both internally and in the eyes of external observers.

It is in this general context that the online opinion survey of the "Visegrad Foreign Policy Trends 2015" project was conducted with the goal of assessing what views various foreign policy stakeholders (politicians, civil servants, experts, analysts, journalists, business representatives) hold in the four Visegrad states concerning their country's foreign policy,

² Ministry of Foreign Affairs of Hungary (2011). "Hungary's Foreign Policy after the Hungarian Presidency of the Council of the European Union". Available at: http://eu.kormany.hu/admin/download/f/1b/30000/foreign_policy_20111219.pdf. Last accessed: December 28, 2015.



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its allies, priorities and activities in certain thematic areas of current affairs. The results of the survey do not only present a unique insight into stakeholders' perception about their own country's foreign policy, but we have also gained a comparative overview of how foreign policy elites approach contemporary challenges and to what extent foreign policy thinking and identity is similar in the four countries. The survey was conducted between July 20 and September 6, 2015, and overall 1,711 stakeholders were invited from the four countries to answer 24 questions in various policy areas (bilateral relations, international topics, international organizations, European integration, the Visegrad Group, transatlantic relations, current affairs, successes and failures). In the end, 429 respondents (25.1%) submitted their anonymous answers in the four countries.

In Hungary, 418 stakeholders were approached and 103 responded (24.6%). The respondents formed a relatively diverse group, which, according to their self-identification, was dominated by civil servants (51 persons, 49.5%). The second biggest group was that of researchers and experts (34 persons, 33%), then followed by journalists (ten persons, 9.7%), and politicians (three persons, 2.9%). Additionally, one business representative and four persons who did not identify themselves with any of the pre-selected categories also filled out the questionnaire. In regional comparison, these numbers mean more researchers and analysts than in the Visegrad Group on the average (24.7%), but significantly less politicians (8.4% in the V4) took part in the Hungarian part of the survey. We can thus conclude that in the Hungarian case, the perceptions to be presented here are predominantly of civil servants, experts and journalists. The input of politicians and business representatives to the picture is marginal in our case. Furthermore, since responding was voluntary, the results are also not representative of the whole foreign policy elite, but we can risk the assumption that those who took the time to respond are more opinionated on the surveyed matters. However, it does not necessarily mean that our respondents are the ones who can exercise substantial influence on the planning or conduct of foreign policy.

This report summarizes the key Hungarian results of the survey, while also providing a brief regional comparison concerning how stakeholders from the other three Visegrad countries think about their own countries' foreign policy, the future of the European Union, and the functioning of the Visegrad Group. While the report touches upon several aspects of the survey, it does not aim to discuss all the topics that were covered in the research.³

³ The complete questionnaire and results are available on the project website at: <http://v4trends.amo.cz/>



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Whom we keep an eye on: Hungary's friends and foes

The first group of questions served to determine which countries foreign policy stakeholders see as important partners, and whether they consider bilateral relations with particular countries to be positive or negative. Stakeholders were asked to identify the five most important foreign partners of their country. All respondents mentioned Germany as one of the main counterparts of Hungary in foreign relations. Then followed the United States of America, listed by 86.1% of the respondents, Russia (73.3%), Poland (59.4%), and in the fifth place, China (35.6%). In fact, China was mentioned only slightly more often than Austria or Romania, which were listed among the five most important countries by 34.7% and 31.7% of the respondents respectively. As this list shows, from the Visegrad countries only Poland made it to the top of Hungary's list. Slovakia is only the 8th most frequently mentioned partner (20.8%). The Czech Republic, however, did not even rank in the Top 10. In turn, Hungary only managed to get into Slovakia's Top 5: with 45.5% of Slovak respondents mentioning the country as an important partner, Hungary lands in the 5th place. Neither Polish, nor Czech respondents listed Hungary frequently enough among their top partners for it to finish in the Top 5, or even Top 10.

The evaluation of bilateral relations' quality shows that while a country can be seen as an important partner, relations might not be flawless at all. And the other way around: relations might be good, but the country could be an unimportant partner. Out of the pre-selected countries,⁴ Hungary's relations were evaluated the most positively with Turkey (an average mark of 2 on a 1 to 5 scale, where 1 stands for very good and 5 for very bad), but the country was mentioned by only 6.9% of respondents as an important partner. Relations with Romania received the worst evaluation, but still a neutral one (3.2). With regards to the key partners, relations with Germany were viewed as good (2.1), while US-Hungarian ties ended up with lower average grades (2.9, which could stand for neutral). Relations with Russia (2.2) were rated almost as good as ties with Germany or China. Ties with Poland, just like with Slovakia, were assessed as good/neutral (2.5), and good with the Czech Republic (2.2). Slovak and Czech respondents rated their countries' relations with Hungary as good (2.4), and Poles evaluated them rather as neutral (2.8).

⁴ The list included: Austria, China, the Czech Republic, France, Germany, Israel, Lithuania, Poland, Romania, Russia, Serbia, Slovakia, Sweden, Turkey, Ukraine, United Kingdom and the United States of America.



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| # | Country | Importance <i>Frequency of being listed among five most important partners</i> | Quality of relations <i>From very good (1) to very bad (5)</i> |
|-----|-----------------------|--|--|
| 1. | Germany | 100 % | 2.1 |
| 2. | USA | 86.1 % | 2.9 |
| 3. | Russia | 73.3 % | 2.2 |
| 4. | Poland | 59.4 % | 2.5 |
| 5. | China | 35.6 % | 2.1 |
| | | | |
| 8. | <i>Slovakia</i> | 20.8 % | 2.5 |
| 13. | <i>Czech Republic</i> | 4 % | 2.2 |

These results should be considered in the context of the Orbán government's Eastern Opening policy, which became the cornerstone of Hungarian foreign policy after 2011. Nevertheless, the two most important partners of Hungary are still perceived to be Germany and the US, Hungary's traditional Euro-Atlantic allies. What's more, Germany is the only country that is unanimously seen by all respondents as one of the most important partners of Hungary. Relations were rated good, but the evaluation was probably not yet much influenced by the tension between the German and Hungarian governments that arose as a consequence of different approaches the two countries took to the refugee and migration crisis from the late-summer of 2015 on. A worse, but still rather neutral, perception of the Hungarian-American relations' quality is most probably due to the fact that bilateral relations hit an all-time low in the end of 2014 following heavy American criticism concerning alleged corruption cases in Hungary and the consequent entry ban of six unnamed Hungarian officials to the US. While open American criticism subsided after the arrival of the new US Ambassador, Colleen Bell, in the first half of 2015, foreign policy stakeholders undoubtedly kept track of the incident. Interestingly, despite Hungarian stakeholders evaluated their country's relations with the US the worst among the V4,⁵ the proportion of those who expected EU-US relations to intensify in the next five years both in the field of economy and trade as well as in security and defense cooperation was the highest among Hungarians compared to other respondents in the region.⁶

⁵ Results for the other V4: Czech Republic and Poland – 1.9; Slovakia – 1.6.

⁶ The question asked "How intensive will transatlantic relations be in the following areas in the next 5 years?" Two broad areas were listed: 1) security and defense; 2) economy and trade. Potential answers were: will be more intensive / somewhat more intensive / no change / somewhat less intensive / less intensive / I don't know. Cumulative results of 'more intensive' and 'somewhat more intensive': the Czech Republic – 79.3% in security/military and 82.1% in economy/trade; Hungary – 80.8 % and 89.4%; Poland – 73.9% and 87%; Slovakia – 78% and 83.1%.



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Russia's important role is largely explained by Hungary's energy dependence on the country. To illustrate, 100% of Hungary's imported natural gas comes from Russia, which amounted to 88.7% of domestic consumption in 2013.⁷ The positive evaluation of bilateral ties was prompted by several recent developments. The Paks-2 deal, signed in January 2014, without a tender granted Rosatom the right to expand Hungary's nuclear power plant and committed Hungary to an unprecedentedly big (EUR 10 billion) loan to finance the construction. Or the high-level visit of Russian President Vladimir Putin to Budapest in February 2015 to renegotiate Hungary's gas supply contract, thanks to which Hungary received favorable concessions regarding the roll-over of unused gas volumes to coming years. Furthermore, the Hungarian government's vocal criticism of the EU sanctions against Russia is often also seen as a gesture toward Moscow. However, this positive evaluation is more telling in regional comparison: as opposed to the good Hungarian opinion, in all other Visegrad countries, bilateral relations with Russia were rated worse than any other ties: in Slovakia with 2.7 they were still regarded neutral, in the Czech Republic with 3.6 already bad, and with 4.5 in Poland bad/very bad. The regional stakeholders' opinion hence suggests that the divide (of perception) rather lies between Hungary and the rest, as opposed to the often voiced "Poland and the rest" division.

While relations are perceived to be good with China and the country indeed was 5th on the list, there is an almost 25 percentage point gap in the frequency of Poland and of China being mentioned among the five most important partners. Given that the country is a focal point of the Eastern Opening, it is an important result that it is to be found in the Top 5. But being listed as key partner by only about a third of all respondents signifies that the policy direction is yet to convince stakeholders. Indeed, 2015 has sent some controversial signals concerning just how serious Hungary's opening toward China is. On the one hand, the two signed a Memorandum of Understanding on the development of the New Silk Road in June, the first such framework agreement China signed with a European country. Yet and more importantly, Budapest failed to submit its application to the Asian Infrastructural Investment Bank to become founding member by actually missing the deadline of March 31 by a day.⁸ A step that purely goes against the logic of the Eastern Opening policy.

⁷ Source: International Energy Agency (2014) "Gas Information 2014".

⁸ Website of the Hungarian Government. "Ésszerű együttműködni Kazaksztánnal [It is rational to cooperate with Kazakhstan]". April 1, 2015. Available at: <http://www.kormany.hu/hu/a-miniszterelnok/hirek/esszeru-egyuttmukodni-kazahsztannal>. Last accessed: December 27, 2015.



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What does the future hold for national and European foreign policy?

In order to assess the potential future direction of the Visegrad countries' foreign policies and the expectations of the stakeholders, they were asked to evaluate the importance of certain topics they expected to be on the foreign policy agenda of their countries in the next five years.⁹ The below table summarizes the five areas most Hungarian stakeholders anticipate to be important or somewhat important. Similarly to the other Visegrad countries, security considerations dominate the expected Hungarian foreign policy agenda as well. Given that the survey was conducted in the summer months of 2015 when Hungary was already experiencing big waves of refugees and migrants arriving through the Balkan route, the evaluation of the instability in the neighborhood – illegal migration – organized crime triad might have been influenced by these events. Nevertheless, instability in the neighborhood most likely included the situation in Eastern Europe in stakeholders' consideration as well.

| # | Issue | Important | Somewhat important | TOTAL |
|----|--------------------------------------|-----------|--------------------|--------|
| 1. | Energy security | 88 % | 11 % | 99 % |
| 2. | Instability in the EU's neighborhood | 66 % | 32 % | 98 % |
| 3. | Illegal immigration | 83 % | 9 % | 92 % |
| 4. | Organized crime | 28.3 % | 53.6 % | 81.9 % |
| 5. | Cyber security | 18 % | 61 % | 79 % |

The country's current foreign policy leadership puts great emphasis on external trade, and 61% of the respondents also expect that the "liberalization of world trade" will be important (21%) or somewhat important (40%) for the country, which brings the topic to the middle of the list of expected priorities of Hungarian foreign policy. With this result, liberalization of world trade is in fact expected to be more of a priority than upholding international law. Even though respondents consider a variety of security-related issues to be important for Hungary's foreign policy in the near future (likely because they perceive them as affecting the country), only 54% expect that "upholding international laws and norms" will be important (16%) or somewhat important (38%) in the next five years as well. These results raise the question whether about half of the respondents actually think that security challenges Hungary is expected to face and is facing will be addressed outside the framework of and without adhering to international laws and norms.

⁹ It should be noted that the question asked about expectations and not preferences ('will be', not 'should be').



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Surveying expectations with regards to the European Union formed a key component of the research. All Hungarian respondents agreed at least somewhat that Hungary's membership in the European Union is beneficial for the country, and 65.7% expect the EU to become more important in the next five years. Since stakeholders clearly confirmed the significance of the EU for Hungary, the areas that will dominate the EU's agenda as well as the direction of its institutional development can be also expected to have a profound importance for the country. When it comes to policy issues, stakeholders are of the opinion that energy policy and enhancing the EU's competitiveness in the world will top the Union's policy agenda. As opposed to the national agenda where security-related matters clearly dominated expected priorities, Hungarian stakeholders preview a more balanced mix of areas to take the lead on the European agenda.

| # | Issue | Important | Somewhat important | TOTAL |
|----|--|-----------|--------------------|--------|
| 1. | Energy policy | 83.3 % | 15.7 % | 99 % |
| 2. | Competitiveness of the EU in the world | 68.8 % | 30.2 % | 99 % |
| 3. | Immigration from non-EU countries | 78.1 % | 19.9 % | 98 % |
| 4. | Single market | 49 % | 46.9 % | 95.9 % |
| 5. | CFSP/CSDP | 52.1 % | 36.5 % | 88.6 % |

In addition to the above Top 5, the Southern and Eastern neighborhood policies are also anticipated to be high on the European list: 84.2% and 84.4% of Hungarian respondents respectively expect these to be at least somewhat important in the coming years. In fact, the assumption that the neighborhoods will be high on the EU agenda corresponds with the notion that addressing instability in the neighborhood will be put on the national agenda too. At the same time, prospects are much bleaker for the enlargement policy: none of the Visegrad countries foresee it to be important on the EU's agenda before 2020, which is understandable in light of the current European Commission's approach to the policy. In Hungary, only 19.8% of the respondents, the least in the V4, anticipate that EU enlargement will receive much attention, ranking it at the bottom of the list of 18 surveyed issue areas. But on the national level the official course continues to support the enlargement of the EU to the Western Balkans and Turkey.

Despite Hungarian stakeholders do not expect enlargement to be high on the EU's agenda in the coming five years, they still seem to be optimistic that the process will go on in the Balkans after a new European Commission takes charge of the EU. 60.9% agreed or agreed somewhat that some of the remaining Western Balkan countries will enter the EU within ten years, that is until 2025. Concerning Turkey, this prospect was barely seen likely: only 6.2% agreed or agreed somewhat with the statement.



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| Statement about the future of EU enlargement | Agree or somewhat agree (HU) | Agree or somewhat agree (CZ) | Agree or somewhat agree (PL) | Agree or somewhat agree (SK) |
|--|------------------------------|------------------------------|------------------------------|------------------------------|
| The EU will admit some of the remaining WB countries within 10 years. | 60.9 | 62 | 43.1 | 70.1 |
| The EU will admit Turkey within 10 years. | 6.2 | 10.7 | 7.9 | 12.9 |
| The EU will open accession negotiations with at least one of the associated countries (Georgia, Moldova, and Ukraine) within 10 years. | 16.5 | 42.7 | 62 | 61 |

Hungarian stakeholders, however, are far less optimistic about accession negotiations with Georgia, Moldova or Ukraine to be even opened in the next ten years. In fact, 54.6% of respondents disagreed with the statement that negotiations will be opened, which is the highest in the V4. Considering that Hungary is an advocate of the membership perspective of these countries on the European level, just like the other three Visegrad countries, the difference is striking. A potential explanation could be that relations between Hungary and Russia are perceived to be much better by Hungarian stakeholders. Thus one could assume that these respondents expect Russia's preferences to be taken more seriously into account by EU member states, which would indeed lead to not opening the negotiations with the associated countries as long as Russia opposes such a development.

When the EU is facing significant challenges both from the inside and the outside, reflection about its own future is certainly in order. Stakeholders were asked to share their view concerning what would characterize the developments of the EU in the next ten years and what future they predict for further EU enlargement. The responses show that Hungarian stakeholders' expectations differ significantly from the direction the Orbán-government would prefer the EU to take.



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| Statement about the development of the EU in the next 10 years | Agree or somewhat agree (HU) | Agree or somewhat agree (CZ) | Agree or somewhat agree (PL) | Agree or somewhat agree (SK) |
|---|------------------------------|------------------------------|------------------------------|------------------------------|
| Stronger supranational elements and a shift in powers to joint institutions | 88.6 | 63.4 | 44 | 69.3 |
| More differentiated (multi-speed) integration | 39 | 83.2 | 78.4 | 79.9 |
| Stronger larger member states which will increasingly determine the course, regardless of the smaller countries | 88.6 | 67.1 | 78 | 69.4 |

Moreover, Hungarian expectations also prove to be a unique combination in regional comparison. The above table shows that the expectations are fairly diverse in the V4. Hungary is somewhat of an outlier when it comes to the rise of supranational elements and the development of a multi-speed Europe. Hungarian stakeholders were more likely than their V4 counterparts to expect the rise of joint institutions, stronger supranational elements, and anticipated in much lower proportions that the integration would go ahead in a differentiated way. National positions formulated in response to the British renegotiation demands in the late months of 2015 serve as a good point of comparison to contrast stakeholders' expectations and governmental priorities, especially concerning issues like the 'ever closer union' opt-out, giving a say to the 'euro outs' on euro matters, or the powers of national parliaments.

ECFR's "Britain in Europe Renegotiation Scorecard" surveyed the official Hungarian position on these demands in September and November 2015.¹⁰ The results showed that the Hungarian government is in support of increasing the powers of national parliaments and would be in favor of abandoning the obligation to work toward an ever closer union (both of which would essentially strengthen national elements as opposed to supranational ones, and the former of which empowers small member states just as much as big ones), and would support the declaration that the EU is a multi-currency union where measures adopted in the Eurozone are only voluntary for those who are out (a call for differentiated integration). Official communication in general also makes it clear that the governmental preference is a Europe of nation states, where member states maintain and safeguard their sovereignty in order to avoid a "creeping" federalization of Europe which Prime Minister

¹⁰ ECFR (2015) 'Britain in Europe Renegotiation Scorecard.' Available online: <http://www.ecfr.eu/europeanpower/britain/renegotiation>.



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Orbán repeatedly warned against in recent years. In sum, with regards to the above statements, the governmental vision would be a Europe with weak supranational elements and with differentiated integration frameworks where no member state instructs another. This is of course a preference, and even the government's own expectations concerning the future reality might be different.

Hungarian stakeholders' expectations, however, certainly indicate (regardless if they share the preferences of the Hungarian government or not, which we have no data on) that they do not expect the Hungarian government's vision to materialize in the EU in the coming decade. The results concerning more differentiated integration are especially surprising: only 39% agree at least somewhat that the EU will move into a more differentiated direction, which in turn indicates that about 60% think that things will either stay as they are or could even get less differentiated. The latter would be supported by the parallel expectation that supranational elements and joint institutions will prevail in the coming decade. The high expectation that large member states will determine the course of the integration (88.6% agree or somewhat agree) suggests that stakeholders see the developments of the next ten years taking shape most likely under German or French leadership (provided the anticipated rise of the EU's supranational character and the no increase or potentially decrease in the differentiated integration). Given the British renegotiation demands, it is not likely that the expectations Hungarian stakeholders hold could be championed by Great Britain in the next ten years.

Regional cooperation: What is the Visegrad 4 for?

The survey was concluded about half a year before the Visegrad Cooperation turns 25 years old in February 2016. A general positive evaluation of the Group the results obtained not only in Hungary, but across the region, is a good sign for the cooperation. But the lack of a clear direction about the future to be presented below suggests that stakeholders have no clear vision what the four countries should focus their attention on.

Although Hungarian stakeholders did not consider bilateral relations with certain Visegrad countries significant, the Visegrad cooperation itself received an overwhelmingly positive evaluation among the respondents. Over 90% claimed that the group is important for Hungary and that they see it as a beneficial framework for pursuing the country's national interests. About 80% saw the cooperation as a constructive actor on the European stage, albeit only 45.4% agreed or agreed somewhat that it is actually influential. The results are similar all across the V4, with the exception of Poland in certain cases. While Polish stakeholders also assessed the V4 as important and beneficial, they to a much lesser extent saw it as constructive and only 20% thought that the group has influence in the EU.



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Concerning the operation of the V4, Hungarian respondents were less united. 59.5% of the respondents evaluated the V4's coordination within the EU as successful or somewhat successful, which might be explained by a divergence of the countries' interests: 58% of Hungarian respondents mentioned precisely this as the biggest obstacle for cooperation in the Visegrad Group. Despite or maybe exactly due to this, an overwhelming majority of stakeholders think that the V4 should strive for joint approaches more often (96.9%), and that V4 partners should be the first ones to be approached when building coalitions within the EU (84.6%). Such coalition-building attempts and more cooperation might help to narrow the gap between national interests when there is no unanimity, and could support the group's effectiveness on the European agenda when interests coincide. Respondents were also optimistic about the future: 93.7% would see added value in extending sectoral cooperation, agreeing at least somewhat that the scope of cooperation should be expanded to new areas too.

Despite the willingness to open up toward new sectors, already existing areas of cooperation were evaluated somewhat ambivalently by Hungarian stakeholders. None of them was viewed as a clear success. Cooperation on the Western Balkans and in culture and education were the areas which were considered to be successful or somewhat successful by a majority stakeholders (62.4% and 62% respectively), while all others – energy policy, defense and Eastern policy – were seen as such by less than half of the respondents. The high level of general support and positive image of the V4 among Hungarian stakeholders despite the lack of obvious sectoral success stories thus indicates that they see the value of the Visegrad Group elsewhere.

When asked about three areas the Visegrad cooperation should focus on in the coming years, responses were fragmented. Energy policy was supported by 53.2% of the respondents, but no other policy area was mentioned by more than 20%. This suggests a lack of clear consensus among Hungarian stakeholders about the future content of Central European regional cooperation. Eastern policy was mentioned only by 13.8% of the respondents, while this area is naturally a much more pressing priority e.g. in Poland where this received the most mentions. Although Hungary seeks to position itself as a strong supporter of the Western Balkans and of EU enlargement, hardly any respondents mentioned these areas to be handled through the Visegrad cooperation in the future. The Western Balkans was mentioned by only one Hungarian respondent per se and only an additional 6.4% argued for EU enlargement to be in the Visegrad Group's focus. This is even more striking considering that the V4's activities in the Western Balkans were actually perceived positively by most stakeholders. These results suggest that the Visegrad Group's foreign policy agenda, which is indeed focused on Eastern Europe and the Western Balkans for the moment, is not seen by Hungarian stakeholders as having much relevance in the future. This is particularly interesting given the fact that Hungary, along with its V4 partners, is involved in sharing its transition experience in the Western Balkans



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both individually and by sponsoring regional exchange and cooperation through the International Visegrad Fund's instruments. These activities should remain important and relevant if the majority of stakeholders actually expect some of the Western Balkan countries to join the EU in the next ten years. Yet, it seems Hungarian respondents do not think that the Visegrad Group should invest much into facilitating this process in the future.

Conclusions

The survey conducted in the framework of the “Visegrad Foreign Policy Trends” project provides important insights into the thinking, expectations and preferences of the foreign policy stakeholders of the four Visegrad countries at a turbulent time beyond the official and already known positions of the national governments. In certain cases, especially concerning expected future policy priorities, the stakeholders' expectations show similarities, but concerning other aspects, e.g. the future development of the EU or the preferred focus of the V4, perceptions differ.

Apart from Poland, Visegrad countries are not seen among the main partners of Hungary, although bilateral relations with them are evaluated as good or neutral. This is the case the other way around as well: only Slovak stakeholders see Hungary among the country's five main partners. Concerning Hungarian perceptions, one of the key findings with regional relevance was how Hungarians see bilateral relations with Russia. While in all other Visegrad states, Russia was not among the main partners and the quality of relations was at the bottom of the list, in the case of Hungary, these relations are seen to be as good as with Germany. In the context of the war in Ukraine, this is a significant difference, and reflects the nature of relations the Orbán-government sought to develop with Russia.

The responses proved that stakeholders expect security-related matters to dominate their countries' foreign policy agendas in all four states. Yet, they expect a more diverse European agenda to develop in the coming years, which, nonetheless, looks complementary to the national agendas. Hungarian expectations are largely in line with those of the other three countries concerning the agenda, but not when it comes to the future development of the EU. Hungarian stakeholders expect the EU to develop into a more supranational and less differentiated integration in the coming decade, while the other Visegrad countries are rather of the opinion that it is going to be more differentiated. The stakeholders' expectations also significantly differ from the preferences of the current Hungarian government, which is strongly against any federalization and strengthening of joint institutions.

As the 25th anniversary of the Visegrad Group is drawing closer, the stakeholders' responses generally paint a positive picture about the importance and utility of the cooperation among



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the four countries. However, when it comes to specific areas of cooperation, no clear sectoral success stories are seen either in Hungary or in the V4 in general. While respondents in all four countries have a similar vision of what is going to be important on the national foreign policy and the European agendas, this is not the case when it comes to their preferences for future Visegrad activities, maybe with the exception of continued cooperation on energy, which, however, dominates all the national and European agendas. What might be interesting is how little stakeholders advocated continuing cooperation in the Western Balkans and stood in favor of EU enlargement. It is especially striking in the Hungarian case, as the country positions itself as a vocal supporter of the EU integration of the Western Balkans, is naturally an advocate of the countries within the Visegrad Group, and actually expects some of the (potential) candidates to join the EU within 10 years. The general fragmentation of preferences concerning the future directions of the Visegrad cooperation – both within Hungary, but also among the Visegrad countries more generally – suggests that while we celebrate the achievements of the past 25 years in 2016, there is also a serious need to discuss future expectations in order to establish where the cooperation might be going in the coming 25 years.



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Founded in October 2003, the AMO Research Center has been dedicated to pursuing research and raising public awareness of international affairs, security and foreign policy. The Research Center strives to identify and analyze issues crucial to Czech foreign policy and the country's position in the world. To this end, the Research Center produces independent analyses; encourages expert and public debate on international affairs; and suggests solutions to tackle problems in today's world. The Center's activities can be divided into two main areas: first, it undertakes [research and analysis](#) of foreign policy issues and comments on [AMO blog](#); and second, it fosters dialogue with the policy-makers, expert community, and broad public.

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