

## GCKN RUNNING ESTIMATE

June 2022 — Update 4



### In the Previous Running Estimate:

- *Russian public opinion for President Putin and his actions in Ukraine had not shifted from April to May 2022. Support for the extended war likely reflected Russian citizens anchoring “more firmly” to their initial perceptions, reinforced by the Kremlin’s increasingly controlled media and manipulative narrative.*
- *Hungarian and Slovakian responses to Putin and the Ukraine conflict warranted a closer look among NATO and EU member states. Both have resisted the call to impose oil and gas sanctions on Moscow, treading carefully because of their energy dependency on Russia.*

### This Running Estimate:

- *Russian public opinion has remained steady from May to June 2022; however, the persistence of the conflict—despite initial Russian expectation of a quick victory—may eventually depress actual support for Putin and his invasion in the long-term, casting a pall over the Kremlin’s aggressive posturing.*
- *Looking to the southwest: Moldova, Romania, and Bulgaria are experiencing a range of different consequences from Russia’s invasion of Ukraine. While Moldova is the least capable of countering potential Russian escalation of the war, neighboring Romania could reduce Russia’s energy dominance in Europe, though it faces the potential for significant Russian backlash. Meanwhile, Bulgaria will struggle to counter societal divisions over the war while continuing to support anti-Russia sanctions related to Ukraine.*

## DOMESTIC RUSSIAN PERCEPTIONS

*The persistence of the Ukrainian conflict, despite Putin’s promise of a quick victory, may eventually diminish the currently strong domestic Russian support for Putin and his invasion, casting a shadow over the Kremlin’s aggressive posturing as NATO’s counterweight.*

- The Russian invasion of Ukraine—buoyed by Kremlin’s tightening of the information space—initially increased domestic Russian support for Putin, reaching 83% in March, falling by 1% in April,<sup>a</sup> and maintaining above 80% in May.<sup>b</sup>

However, the Kremlin’s ongoing struggles in Ukraine has led to at least limited internal skepticism that it can credibly threaten NATO and its members.<sup>1</sup>

- On 2 June, Statista released a poll conducted in collaboration with the Levada Center from 26-31 May showing above 80% domestic Russian approval for Putin. The Russian invasion bolstered Putin’s popularity, which had declined during the COVID-19 lockdown in 2020.<sup>2</sup> Historical Statista survey data indicates Putin’s approval favorably responds

a Levada-Center, 2022. “The Conflict with Ukraine and Responsibility for the Deaths of Civilians.” Yuri Levada Analytical Center, 18 May 2022. <https://www.levada.ru/en/2022/05/18/the-conflict-with-ukraine-and-responsibility-for-the-deaths-of-civilians/>

b Statista conducted the survey in collaboration with the Levada Center on 26-31 May, 2022 on a representative sample of 1,634 respondents aged 18 years and older across Russia. The survey method was face-to-face interviewing. Statista released the result of the survey on 2 June 2022. <https://www.statista.com/statistics/896181/putin-approval-rating-russia/>



to Russian aggression towards European neighbors, but domestic issues—e.g., pension reform and economic struggles—may eventually bring his numbers down.

- In Russia’s somewhat independent *Nezavisimaya Gazeta*, a 2 June editorial stated that the Putin regime’s persistent high rating stems primarily from consistent Kremlin positive coverage of the conflict, coupled with serious penalties for any protest . . . driving at least a portion of the Russian population to **not** be satisfied with the mere “liberation” of the Donbas.<sup>3</sup>
- Looking back, a poll released on 29 April by ExtremeScan indicated support for the Ukrainian invasion was strong at 66%, which is significantly lower than other surveys from that period.<sup>4</sup> Ten percent of respondents selected the option, “I do not want to answer this question”, **suggesting that this survey’s results were closer to reality than state polling, which is almost certainly masking any declining support for Putin.**

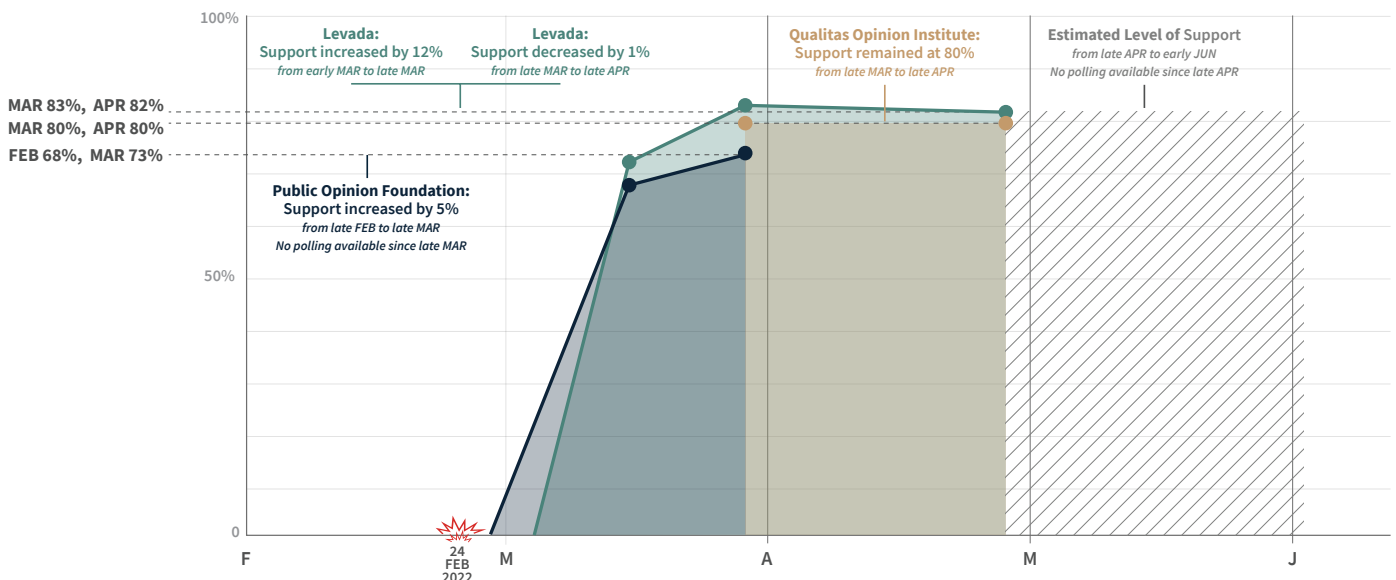
**Public opinion polling suggests a substantive number of Russians sympathize with Ukrainians about the Russian invasion. This sentiment can be connected to any one of three Russian mindsets: 1) The Ukrainians were victims of perceived NATO and/or Nazi manipulation and the invasion has been necessary to rescue them, 2) the Ukrainian people are caught in a proxy war between the Russia and the West, or 3) the Ukrainians are**

**victims of Putin’s wrongful invasion.**

- A sociological study of Russia’s military operation<sup>5</sup> in Ukraine and an analysis of Telegram messages<sup>c</sup> indicate that as of late April, 69% of Russians sympathize with Ukrainians, including 51% who are “very empathetic” and 15% who are “empathetic”. Twenty-six percent of respondents do not feel sympathy for Ukrainians.<sup>6</sup> The survey also indicated 46% of Russian Telegram messages contained words of support, including “hold on,” “we are with you,” etc., despite hostility between both countries.<sup>7</sup> Although some of the 46% of supportive messages also expressed Russian propaganda—e.g., “we will soon come to you and liberate”—about a third of Russian responses appeared to be sincere support for Ukrainians.
- According to the survey, 36% of Russians feel alienated from the decision process about events that affect their personal lives, including 22% who feel they cannot influence decisions at all. This lack of individual agency is further reinforced among the 30% of Russians who say their country should end the special military operation, as only 19% would end it themselves if given the opportunity. **This highlights the cumulative impact of Russian paternalism on individual citizens.**

c The ExtremeScan “Chronicles” survey is representative of the Russian population aged 18 years old and older by gender, age, size of settlement, and region of residence. The survey was conducted from 10-14 April by a group of independent Russian sociologists who do not support the war.

## Domestic Russian Perceptions of the "Special Military Operation" Public Opinion Polls in Russia Show Steady and High Support



\*It is important to note that Russian opinion polls are immediately instrumentalized by the Kremlin, repeated by the Russian media, and used to claim that the invasion is supported by the Russian public and conducted in its name.

Figure 1. Domestic Russian Perceptions of the "Special Military Operation" public opinion polls, GCKN.

## POLLING SNAPSHOT

### ExtremeScan survey of Russian attitudes towards military actions in Ukraine<sup>8</sup>

- **Attitudes towards military actions in different social-demographic groups.** 78% of Russians of retirement age support the special military operation and surround themselves with those who support it. Only 42% of 18-29 year-olds indicate this same attitude and behavior. Young people continue to form the base of opposition to the war.
- **Russians with higher education are less likely to support the invasion than Russians with lower education.** Higher education 63%; lower education 69%.
- **Permanent personal connections in Ukraine significantly weakens support for Russian military operations there.** 66% of the total population; 63% of those with no connection with Ukraine; 73% of those without current connections to Ukraine; 71% of those with current connections to Ukraine; 60% of those with permanent connections to Ukraine.
- **Having servicemen in the family increases support for military operations.** 66% of the total population; 74% of those with servicemen in the family; 62% of those without servicemen in the family; 36% of those with family members of pre-conscription age; 58% of those with family members of conscription age.

### ExtremeScan Chronicles Survey on sympathy for Ukrainians<sup>9</sup>

- **Russians have low confidence in their own influence over their lives in the context of the Russia-Ukraine conflict.** 38% can influence; 36% cannot influence.
- **Russians who support military operations in Ukraine trust authorities.** 78% of population who support the military operation trust the actions of authorities.
- **Russian sympathy for Ukrainians.** Sympathy for all 51%; sympathy for Ukrainians and not Russians 6%; sympathy for Russians and not Ukrainians 4%; no sympathy for anyone involved 5%.
- **Ready to host refugees from Ukraine.** Sympathy for all refugees (*Yes 31%, No 36%*); sympathy for Ukrainians and *not* Russians (*Yes 30%, No 62%*); sympathy for Russians and *not* Ukrainians (*Yes 15%, No 83%*); no sympathy for anyone (*Yes 22%, No 71%*).
- **Happiness level of Russian “war advocates” vs general population** General population (*happy despite war 78%, unhappy 14%*); War Advocates (*happy despite war 92%, unhappy 4%*).

### Telegram Messages to Ukrainians<sup>10</sup>

- **Russian words of encouragement (e.g., “hang in there,” “you will be fine,” “take care of yourself”)** Sympathy for all 27%; sympathy for Ukrainians and *not* Russians 17%; sympathy for Russians and *not* Ukrainians 7%; no sympathy for anyone 14%.

# A CLOSER LOOK: MOLDOVA, ROMANIA, AND BULGARIA

## Moldova

*Moldova's recent push to join the European Union (EU) stems largely from its concern that the Kremlin's Ukraine invasion is part of a broader plan to redraw the map of the Black Sea Region to Russia's advantage.* The Kremlin maintains several pressure points in Moldova, including its influence and leverage over the country's breakaway republic of Transnistria, Russian-language media through which it spreads disinformation,<sup>11</sup> opposition parties with deep ties to Moscow,<sup>12</sup> Moldova's energy dependence on Russia, and the continuing influence of the Orthodox Church.<sup>13</sup>

- The Kremlin's invasion of Ukraine has raised concerns of Moldovans, particularly because their country is one of the poorest in Europe with the least resources to counter adversarial Russian actions.<sup>14</sup> Consequently, a majority of Moldovans (51%) prefer neutrality versus membership in the Russia-led Collective Security Treaty Organization (CSTO) (5%) or NATO (4%) to guarantee their security, according to recent polling.<sup>15</sup>

- In April, Russia's Central Military District commander said Russia would create a corridor from eastern Ukraine to the Russian-backed separatist enclave of Transnistria, confirming Moldovan fears about Putin's regional goal.<sup>16</sup> Press reporting indicates Russia is carrying out provocative false flag activities in Transnistria, including bombings, gunfire, and drone attacks. Additionally, Russia is recruiting Transnistrians to fight in Ukraine.<sup>17</sup>
- In March, Chişinău commenced the process to fast-track EU membership, but has refrained from efforts to join NATO in order to avoid provoking Russia.<sup>18</sup> Earlier in 2014, it signed an Association Agreement with the EU, setting goals that align with the EU's political and economic standards.<sup>19</sup> Moldova has also placed its limited security forces on alert<sup>20</sup> and banned the display of Russian symbols "Z", "V", and the Saint George ribbon, demonstrating solidarity with Ukraine and a political stance against pro-Russia factions in the country.<sup>21</sup>

## MOLDOVA AND TRANSNISTRIA

In 1940, present day Moldova was separated from Romania and combined with Transnistria to form the Moldovan Soviet Socialist Republic (MSSR). The Transnistria region, which is east of the Dniester River along Ukraine's border, had been a part of the Soviet Union since the 1920's.

During the waning years of the Soviet Union, the MSSR sought independence. Following the 1991 collapse of the USSR, war broke out as the largely Russian-speaking Transnistria asserted its autonomy from the newly independent Moldova.

Though a cease-fire has been in place since 1992, the Transnistria region remains highly contested—defying several negotiations and agreements—and is firmly in the Russian sphere. Moscow subsidizes Transnistria, issues Russian passports to residents, and maintains over 1,500 Russian "peacekeepers" there.<sup>22</sup>

According to the latest Moldovan census (2004), nearly 76% of the Moldovan population is ethnic Moldovan, over 8% is Ukrainian, 6% is Russian, and 2% is Romanian. While there is debate over whether Romanians and Moldovans are actually the same ethnic group, there exists a strong Romanian identity. In Transnistria, 32% are Moldovan, 30% are Russian, and 29% are Ukrainian, creating a Slavic majority.<sup>23</sup>



Figure 2. Map of Moldova and "Transnistria", GCKN.



## ROMANIA CAN SERVE AS AN ENERGY COUNTERWEIGHT TO RUSSIA

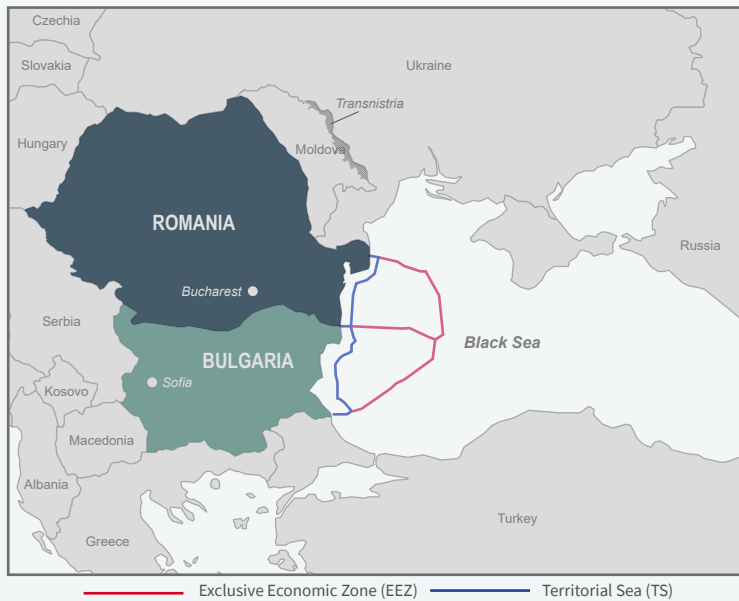


Figure 3. Map of Romanian and Bulgarian Territorial and Exclusive Economic Zones, GCKN.

In late April 2022, Bucharest advanced legislation to exploit its vast Black Sea natural gas reserves (estimated at 200 billion cubic meters) in response to the Russia-Ukraine war, Russia's threat to halt gas supplies to Europe, and discussions of EU sanctions against Russian oil and gas.

Romania's Black Sea oil and gas sector could attract approximately \$16 billion in investments, support about 30,000 jobs per year throughout the lifetime of the Black Sea gas fields, sustain domestic consumption for about 19 years, contribute about \$26 billion to national revenue, and boost its profile as one of Europe's biggest natural gas suppliers.

Though susceptible to corruption, which could undercut its energy success, Romania's move toward energy self-sufficiency could significantly undercut Russia's oil and gas revenue and elicit a malevolent Russian response.<sup>33</sup>

### Romania

***Ongoing Russian war efforts in south and east Ukraine creates anxiety in neighboring Romania, raising the likelihood that Bucharest will place increasing emphasis on force modernization and seek even stronger defense and security ties with the United States, NATO and the EU.*** Already in close proximity to heavily Russian-influenced governments in Hungary, Serbia, and Moldova's breakaway republic of Transnistria, Bucharest—a member of NATO since 2004 and the EU since 2007—will remain critical to regional deterrence against Russia, but struggle to counter the Kremlin's use of disinformation.<sup>24</sup>

- The Kremlin's disinformation operations, including a narrative that it is being attacked by NATO and Western mercenaries,<sup>25</sup> exploits historical Romanian populism which makes it difficult for Bucharest to counter.<sup>26</sup> Russia's disinformation operations challenge Romania's role in NATO and the purpose of its anti-missile shield in Deveselu.<sup>27</sup>
- In July 2020, after the U.S. announced plans to re-deploy troops from Germany, Romanian president Klaus Iohannis expressed interest in hosting more American forces.<sup>28</sup> At that time, Bucharest was already hosting a NATO military airbase with a U.S. presence and a missile shield center.<sup>29</sup> Romania offered to establish and pay for a permanent U.S. base in the country,<sup>30</sup> and purchased 48 used F-16s.<sup>31</sup>
- A March 2022 IRES survey of 1,051 Romanians indicated that 60% fear the prospect of war in Romania, but only 22% think war is possible.<sup>32</sup> However, if Romania engaged in war,

36% would remain and seek shelter, 27% would remain and fight, 20% would carry on with their life as always, and 14% would leave the country, which could exert pressure on regional resources and capacities.

### Bulgaria

***Bulgarian society is caught in the cross-waves of the Russia-Ukraine conflict, challenging Sofia's efforts to mitigate economic risks, reduce popular anxiety, and manage political fallout regarding the conflict and Sofia's role in it.*** According to recent polls in Bulgaria, anti-Russia/anti-Putin sentiments outweigh pro-Russia/pro-Putin views, and a majority favor strengthening the country's relations with Europe and NATO over Russia. ***However, societal divisions along three lines—pro-Russia/Putin, pro-Europe, and those in between—still portend challenges for Sofia.***<sup>34</sup>

- According to a Gallup poll conducted in Bulgaria 29 April-6 May, 47% of respondents do not agree with Putin's actions in Ukraine, 29% agree, and 24% are undecided.<sup>35</sup> In a 22-26 March survey by MarketLinks, 67% of respondents preferred Bulgaria to be neutral in the Russia-Ukraine conflict,<sup>36</sup> while only 16% supported military assistance to Ukraine, 60% supported Bulgaria's NATO membership, and 77% supported Bulgaria's EU membership,<sup>37</sup> highlighting the country's complicated societal division.

- A 25-29 March survey by the Center for Analyses and Marketing indicated that 70% of Bulgarians believed NATO was best positioned to guarantee their country's national security, compared to the 12% and 6% respectively who said the same about Russia and Bulgaria alone.<sup>38</sup> Regarding attitudes toward Russia after its invasion of Ukraine, 33% remained positive, while 50% were negative. Thirty-four percent of those who held negative attitudes towards Russia had changed from positive to negative after the invasion.
- Since the invasion, pro-Russian elements within Bulgarian politics, business, and media have operated as 'fifth columnists,' according to the Daily Press.<sup>39</sup> While the nationalist opposition Vazrazhdane party has protested Sofia's preoccupation with the conflict,<sup>40</sup> Bulgarian shippers, grain producers, and restaurateurs are allegedly using pro-Russia narratives to criticize Sofia,<sup>41</sup> and communist-era veterans are using Kremlin propaganda to undermine the government.<sup>42</sup>

## BULGARIA'S ACTIONS FOLLOWING RUSSIA'S INVASION OF UKRAINE

After Russia invaded Ukraine, Bulgaria—a member of NATO since 2004 and the EU since 2007—began reversing over a decade of alignment with Russia and moving closer to Europe. This prompted the Kremlin to begin exploiting Bulgaria's 95% energy dependency (natural gas) on Russia to exert pressure on the Bulgarian government.

However, Sofia resisted, insisting that Russia will permanently lose customers if it continues to weaponize its energy supply. Bulgaria is determined to diversify its natural gas requirements away from Russia, despite previous failures to do so.

In April, Sofia refused to exchange rubles for Russian oil and gas, prompting the Kremlin to cut deliveries to the country. Despite the standoff, Sofia will seek an exemption from the EU oil embargo until 2024 in order to affordably and gradually reduce its heavy dependence on Russia.<sup>43</sup>

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# ENDNOTES

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## Image Content

Figure 1. Susan Littleton, *Domestic Russian Perceptions of the "Special Military Operation" public opinion polls*, infographic, GCKN, Fort Leavenworth, Kansas.

Figure 2. Susan Littleton, *Map of Moldova and "Transnistria"*, GCKN., map, GCKN, Fort Leavenworth, Kansas.

Figure 3. Susan Littleton, *Map of Romanian and Bulgarian Territorial and Exclusive Economic Zones*, map, GCKN, Fort Leavenworth, Kansas.