

GALLUP

Balkan Monitor

Insights and Perceptions: Voices of the Balkans

in partnership with the

European Fund for the Balkans

2008 Analytical Report

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Insights and Perceptions: Voices of the Balkans

The Western Balkans is a constantly changing region that often finds itself in the spotlight. Although its development seems marked by dynamic growth, there is also the difficult legacy of numerous conflicts and crises. Kosovo's declaration of independence, the arrest in Serbia of former Bosnian Serb leader and top war crimes suspect Radovan Karadzic and the increasing political tensions in Bosnia and Herzegovina are just a few of the many developments that have recently taken place in the region.

However, despite the high interest in the Balkans, not much is known about its people, their expectations and feelings, and their points of view about the changes taking place around them. Journalists often have to write about individuals and their stories or rely on anecdotal evidence due to the lack of evidence-based research originating from the Western Balkans; in turn, decision-makers focus their attention at the political and institutional levels.

History shows, however, that in order for administrations to be effective, there must be a close link between the authorities and the people they represent. In this case, it shows the need for a greater understanding of the perceptions and attitudes of the people of the region. To meet that requirement, Gallup has launched a multi-year project – the Balkan Monitor – that examines changes in how various aspects of life are perceived in the Western Balkans over time.

The Monitor aims to provide behavioural economics data to answer key questions, such as:

- How do the people of the region evaluate their economic situation and their living standards?
- What are their views on the developments in their respective countries?
- How do the region's people feel about their neighbours?
- To what extent do citizens trust their local institutions?
- Do people feel that sufficient opportunities for employment exist in their home countries?

The region has also embarked on a steady course towards full EU integration and, so far, 2008 has been an important year in that respect. All of the region's countries, with the exception of Kosovo, have now signed pre-accession agreements (Stabilisation and Association Agreements, SAAs), as well as visa facilitation agreements. However, the progress towards EU membership has been uneven. Although Croatia is expected to conclude membership negotiations by the end of 2009 and Serbia

seems likely to receive official EU candidacy status by that date, the situation in regard to EU candidate Macedonia is stagnating and the lack of progress in Bosnia and Herzegovina has been heavily criticised.

Given the rather uneven progress towards the Balkans' integration into the EU, other questions arise:

- How strong is the support for EU membership in the region?
- Do the people of the region feel wanted and welcomed by the European Commission and by EU citizens?
- What date do they find realistic for their respective countries to join the EU?

Aiming to respond to many such questions on a wide variety of topics, the Balkan Monitor was conducted in cooperation with the European Fund for the Balkans (EFB) – a joint initiative of European foundations in Albania, Bosnia and Herzegovina, Croatia, Kosovo, Macedonia, Montenegro and Serbia supporting projects aimed at bringing the Western Balkans closer to the EU.

Results of the survey are analysed on a country level. However, as opinions are often split between people with different ethnicities or nationalities and the population of most of the Western Balkan countries is characterised by a mix of nationalities and ethnic groups, results in the countries may vary importantly. In order to explore those differences, the results of most questions were also analysed at an internal regional level, separating those areas mostly settled by ethnic minorities or people with a different nationality from those mostly settled by nationals.

This means, for example, within Macedonia, we look at differences between people living in the north-western regions and Skopje, which are mostly settled by Albanians, and the rest of Macedonia. In Montenegro, the regions Tuzi, Ulcinj and its surroundings, where mostly Albanians live are investigated separately from the rest of Montenegro. For Bosnia and Herzegovina, the results are split between Republika Srpska, mostly populated by Serbs, and the Federation of Bosnia and Herzegovina, mainly peopled by Bosniaks and Croats.

In Kosovo, results are tested for differences between the North of Kosovo and Serbian enclaves, populated by a Serbian population, and the Albanian rest of Kosovo. In Serbia, results are separated between the northern part of Voivodina and Sandzak, where an important part of different minority population lives, for example Hungarians.

Albania, with its very homogenous population, and Croatia, which is mostly settled by nationals, were excluded from this demographic analysis.

The survey was representative of the adult population (15 years and older) in the Western Balkan countries. Per country, at least 1,000 face-to-face interviews were conducted from the 4th of September to the 30th of October, each one lasting for about one hour. The margin of error for the survey was +/- 3%.

Main findings

Life satisfaction and country development

- The two countries that turned independent most recently, Kosovo and Montenegro, were the only countries where a majority of respondents (62% and 59% respectively) were optimistic about their country's future. Pessimism was widespread in Croatia (where 64% saw their country going in the wrong direction) and Bosnia and Herzegovina (61%).
- With the exception of Croatia and Kosovo, more than half of the people of the region were dissatisfied with their standard of living. Approximately two-thirds of interviewees in Serbia (62%) and Macedonia (64%) were not satisfied with their living standards.

Economy and work

- A majority across the countries considered the current economic conditions in their country to be bad and that finding a new job was the same or harder today than one year ago.
- Not having the right connections is considered by most respondents as an important barrier to finding a new or a better job

Attitudes on political institutions

- People in the Western Balkan countries felt somewhat remote and alienated from their political institutions. Interest in current affairs was low and only a minority of respondents felt represented by any party or politician.
- Kosovo (53%) and Montenegro (55%) were the only territories where a majority of respondents spoke positively about their government's performance. In comparison, dissatisfaction was the most blatant in Bosnia and Herzegovina, where 67% gave a negative assessment.
- The people of the region did not show much trust in their countries' political bodies. Indeed, the national political institutions only achieved a low-middle ranking in terms of trust; the church (and other religious organisations) came top in almost all of the countries.
- Kosovo and Albania were exceptions: there, instead of the religious organisations, NATO was said to be most trusted.

Good governance and corruption

- Except for Albania, not more than one in 10 Balkan respondents reported an encounter that could be interpreted as a need to bribe a government official in the year prior to the survey. In Albania, this figure reached 32%.
- Macedonia was the only country where those who agreed that their government was doing enough to fight organised crime outnumbered those who felt the opposite (49% vs. 35%).

Integration into the European Union

- Kosovo and Albania viewed the EU particularly positively; citizens in Croatia and Bosnia and Herzegovina – especially within the Serbian entity – were the most negative. In Albania, 83% of respondents believed that their country's EU membership would be a good thing. Kosovars, however, trusted NATO even more than the EU institutions.
- While there were more Croats who believed that it was a good thing for their country to become an EU member than those who did not, the relative majority took a middle position: agreeing with the statement that it was neither good nor bad. Almost half (47%) of the Croats who were willing to judge the mood of the country believed that their compatriots were supporting EU membership; just over half (53%) believed that the majority were against joining the EU.
- With the exception of BIH and Croatia, a majority of respondents was satisfied with the progress their countries made in meeting the accession criteria of the European Union.

International Community

- The ease of travel and visa regulations is in the top of list people expect from the International Community.
- Help on EU accession and on the improvement of the countries' infrastructure and are other top priorities where people are looking for external help across the countries.
- With the exceptions of Albania and Kosovo, one-third or fewer of the people in each country believed that the ICTY proceedings were impartial and the outcomes open.
- Almost half of the Serbian respondents thought that Radovan Karadzic was innocent of the crimes of which he is accused (47%); on the other hand, 45% believed that his arrest was good for the future of Serbia.

Migration and mobility

- Three-quarters (73%) of interviewees in Kosovo thought there were better opportunities abroad.
- Ideally, approximately 20% of the respondents from each country said that they would move to another country – the only exception was Croatia, where only 7% would like to move temporarily or permanently.
- Montenegro and Croatia were the only states where most people believed that their country offered sufficient opportunities.

Neighbourly relations

- Opinions on the strength of their countries' ties to their neighbours were divided. However, at least a relative majority in the countries considered the relations not being strong enough. The loudest call for tighter relations between the neighbouring countries came from Serbia (62%), Bosnia and Herzegovina (61%) and Macedonia (57%).
- Croatia, Bosnia and Herzegovina and Macedonia have the highest numbers of people who believe that their country is not doing well in respect of settling disputes with neighbours.

Views on Kosovo's independence and the region's future

- With the exception of Kosovo, Albania and Croatia the relative majority of respondents feared that Kosovo's independence would have a negative impact on the stability of the region.
- Only 17% of the Kosovo Serbs said it would be possible to live peacefully with Kosovo Albanians; of the latter, seven in ten (72%) felt peaceful coexistence was viable.
- Six in 10 (61%) of the Serbian residents said Kosovo's independence would never be accepted; a quarter thought this would be possible within 10 years.
- A clear majority across all countries thought the future of the region would be peaceful. Around one in four Serbs and Macedonians (22% and 29% respectively), however, felt there could be another war in the region.

Country overview

Albania: supportive of the EU, happy to leave the country

Albanians believed that their country would be welcomed by the EU as a new member state. The European Union, in fact, was seen to be having a strong impact: the majority of Albanians trusted the EU institutions and 83% believed that EU membership would be good for Albania. Bribery towards government officials and civil servants was reported as being by far the highest in the region with one-third of respondents having to pay a bribe in the year prior to the survey. Only 29% believed that the government was doing everything it could to fight organised crime. Albanians seemed to be the most mobile of the region's people with over two-fifths of respondents stating that they had a family member working or studying abroad. Over one-third of Albanians said they wanted to move away from the country.

Bosnia and Herzegovina: feeling disillusioned

The majority of Bosnians were dissatisfied with the current economic situation (87% were unhappy) and expressed little hope for any improvement in the future. (Two-thirds of respondents in the Federation believed that economic conditions were getting worse, while less than half – 44% – felt that way in Republika Srpska, with 31% actually seeing signs of improvement.) The government was seen as performing extremely badly (with a 67% negative rating – the worst in the region: 70% in the Federation and 56% in Republika Srpska) and as being ineffective in its fight against organised crime. Of those who answered the question, 45% of respondents in the Federation had little or no trust in the European institutions; in the Serbian entity, 77% of the respondents gave the same response. The Republika Srpska also reported the highest proportion of people in the region (48%) who felt rejected by the EU citizens; in the Federation, only a third (30%) felt that the EU citizens did not want them to join the Union.

Croatia: happy with personal life, unhappy with the direction of the country

While Croatian respondents were satisfied with life (72%), they had a very negative outlook about their country's economic future (61% felt it was getting worse). This was also reflected in dissatisfaction with the government and its actions against organised crime (78% were unhappy). However, the Croatian interviewees saw good opportunities in their country and only a low percentage (7%) felt forced to leave for economic reasons. The majority felt well-informed about the EU (54%) and were the most optimistic about the accession date: on average, Croats expected to join the EU in 2013. There were more Croats who believed that membership in the EU was good for

the country (29%), than those who judged it to be bad, (26%). However, with the accession date getting closer, the relative majority (38%) were not taking sides (saying it was neither good nor bad). When respondents were asked if they thought that the majority of their fellow citizens were supporting or opposing EU membership, 39% felt that overall there would be support for EU accession, while 45% thought there would be opposition.

Kosovo: upbeat about life and the EU, but not about the economy

Respondents in Kosovo were upbeat about their lives and extremely hopeful for the country's general and economic future (59% were positive). The current economic situation was seen in a much darker light, though, which explained why over 70% of the respondents saw better opportunities outside of the country and the high percentage of those having a family member abroad. Kosovo respondents were generally optimistic about the hopes for future peace in the region. While 72% of Kosovo Albanians thought a peaceful coexistence with Kosovo Serbs was possible, only 17% of Kosovo Serbs were convinced of such a possibility. Less than half (45%) of Kosovar Albanians agreed that "the Kosovo Albanian leadership has to do everything to protect Serbs living in Kosovo" while 47% disagreed. Just under two-thirds (63%) of respondents in Kosovo had a "lot of trust" in NATO while less than half (43%) placed "a lot of trust" in the EU institutions.

Macedonia: dejected about life and fearful of an armed conflict

Many Macedonian respondents were dissatisfied with both their life (at 46%, this was the lowest ranking in the region) and with their standard of living. One-third, however, felt the economy was improving. Respondents condemned corrupt behaviour and were relatively satisfied with the government's efforts in fighting organised crime (49% were satisfied). Three in 10 Macedonians felt there was a likelihood of another armed conflict in the region (29%). While 70% of the Albanians in Macedonia believed that the Ohrid Agreement provided a good long-term solution for Macedonia's ethnic problems, only 30% of Macedonians agreed. According to 69% of the Macedonian Albanians, Macedonia should join NATO and the EU even if it meant losing or changing the official name of the country – a notion that was only supported by 3% of the Macedonians (majority of the population). The majority of both communities agreed that the country's membership of the EU would be a good thing – (84% of Albanians, 57% of Macedonians).

Montenegro: an overall feeling of achievement and acceptance

The respondents in Montenegro were satisfied with their life (71%) and rather positive about the economy and its future development (49%). Trust in the government was high (63%). With opportunities in the country being seen as sufficient, there was little desire to leave the country. Montenegrin interviewees had relatively relaxed views about acceptance of questionable practices. Regarding the EU, the population felt rather ill-informed (60%).

Serbia: dissatisfied about life today, divided about the future

Serbian respondents showed a high dissatisfaction with life (42%). Respondents were divided in their anticipation of the future with 47% believing that things in general were going in the wrong direction and 41% thinking the opposite. Close to half of the interviewees (46%) had a “lot” or “some” trust in the Serbian government. However, at the same time, the majority (58%) said the government was not able to fight organised crime effectively. Three-fifths of the interviewees thought that Kosovo’s independence would never be accepted by Serbia and one-fifth feared another armed conflict in the region – the second highest proportion in the region after Macedonia. Radovan Karadzic was deemed to be innocent by almost half of the respondents. Despite that, about the same share (49%) agreed with the statement that his arrest allowed Serbia to focus on the future.

Living Conditions

The Western Balkan region’s recent history has been marked by conflicts and ethnic tensions. Looking ahead, it is therefore essential to see how its inhabitants view their lives today, how satisfied they are with their situation and how they perceive their future.

Less than 15 years after the 1992–1995 war, the Balkan Monitor shows a rather fragmented picture of the Western Balkans:

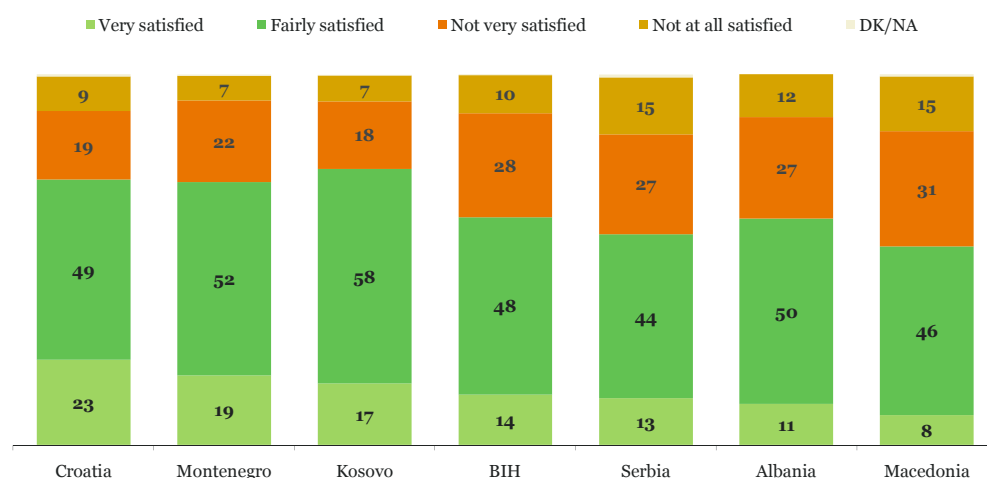
- Although the majority of citizens are satisfied with their lives in general, many are unhappy about the economic situation and their future prospects;
- While there are some extremely optimistic ‘new states’ – Montenegro and Kosovo for example - others are more disillusioned – especially Bosnia, Serbia and Macedonia;
- There is a general feeling of satisfaction throughout the Balkans with Montenegrin and Kosovar interviewees proving the most optimistic about the future.

A majority in the Balkans are happy with their lives

Throughout the Western Balkan countries, a **majority of respondents said they were generally satisfied with their lives**. These feelings were particularly high in Croatia, Montenegro and Kosovo: around three-quarters of respondents said they were at least fairly satisfied with their lives. In Croatia, approximately one in five insisted that they were very satisfied.

Dissatisfaction with life in general was particularly high in Serbia and Macedonia, where less than six in 10 respondents were satisfied with their lives and more than four in 10 were not. Fifteen percent of the citizens in both countries even said they were not at all satisfied.

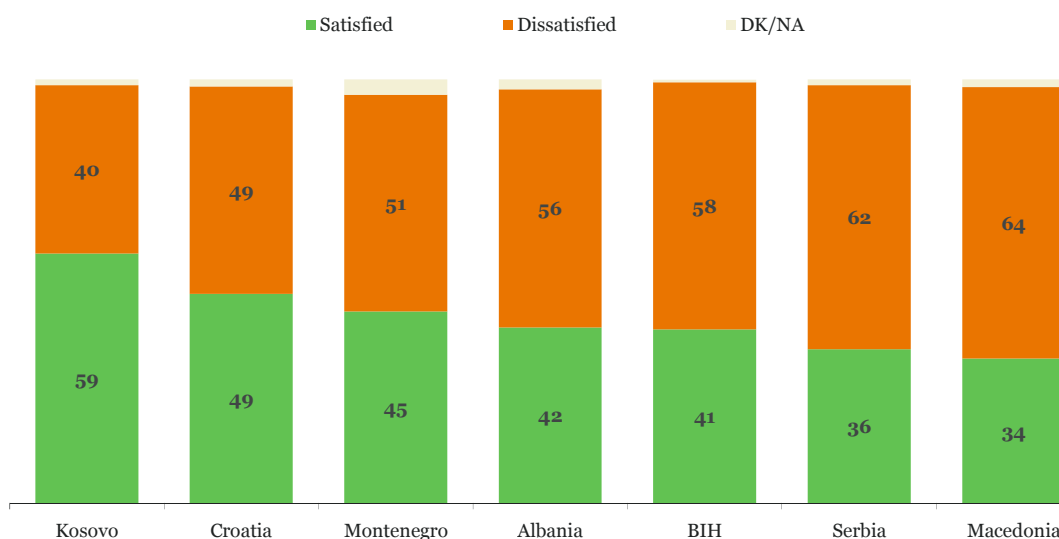
Life satisfaction in the Balkans



On the whole, how satisfied are you with your life in general?

Concerning the standard of living, however, respondents painted a different picture. Except for Kosovo and Croatia, more than half of the respondents said they were dissatisfied with their standard of living. The level of dissatisfaction was especially high in Serbia and Macedonia, where approximately two-thirds of respondents were unhappy with their living standards and only around a third were satisfied. In Kosovo, a majority of respondents were satisfied with their standard of living (59%); in Croatia, equal numbers were satisfied and dissatisfied (both 49%).

Satisfaction with standard of living

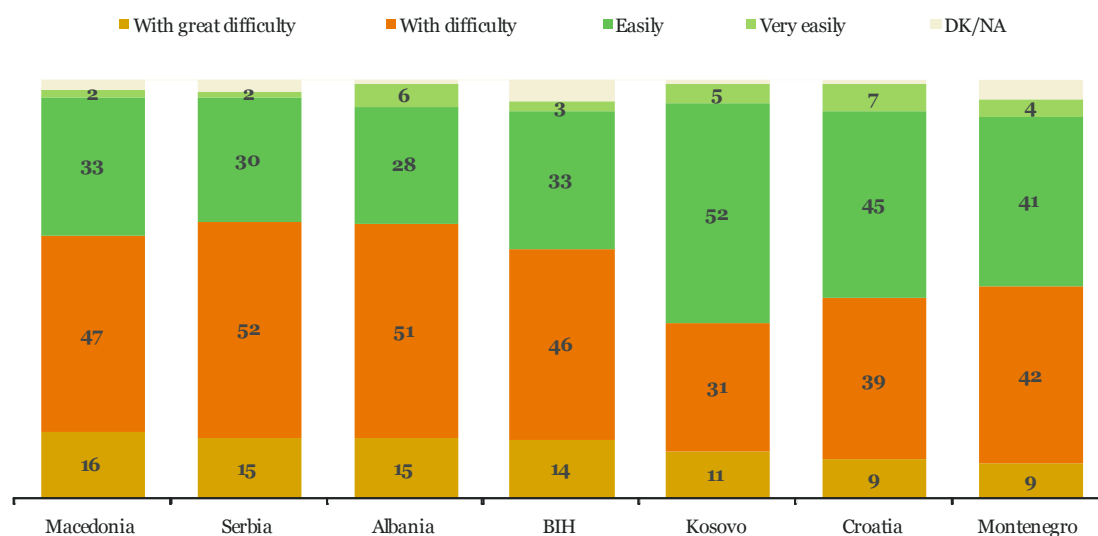


Are you satisfied or dissatisfied with your standard of living, all the things you can buy and do?

Accordingly, it was only in Croatia and Kosovo that there were more respondents saying that they could easily get by on their household’s income than those who complained about money problems (Croatia: 51% vs. 48%, Kosovo: 57% vs. 42%). In the other Balkan countries, **a majority of respondents said they had difficulties getting by on the money they had available:** In Serbia (66%), Albania (66%) and Macedonia (63%), approximately two-thirds said they had difficulty in getting by on their household’s income, while only approximately one-third said they were easily surviving (31%, 34%, 35%). The results were similar for Bosnia and Herzegovina, where six out of 10 respondents reported money problems and 35% didn’t.

Respondents in Montenegro, however, seemed to be somewhat better off: only a slight majority bemoaned the fact that they had problems in surviving on their household’s income (51%), while 45% said they were easily getting by.

Getting by with income



How do you get by with your household's income ?

The *Monitor* revealed major differences in the levels of satisfaction across regions in most of the Western Balkan countries.

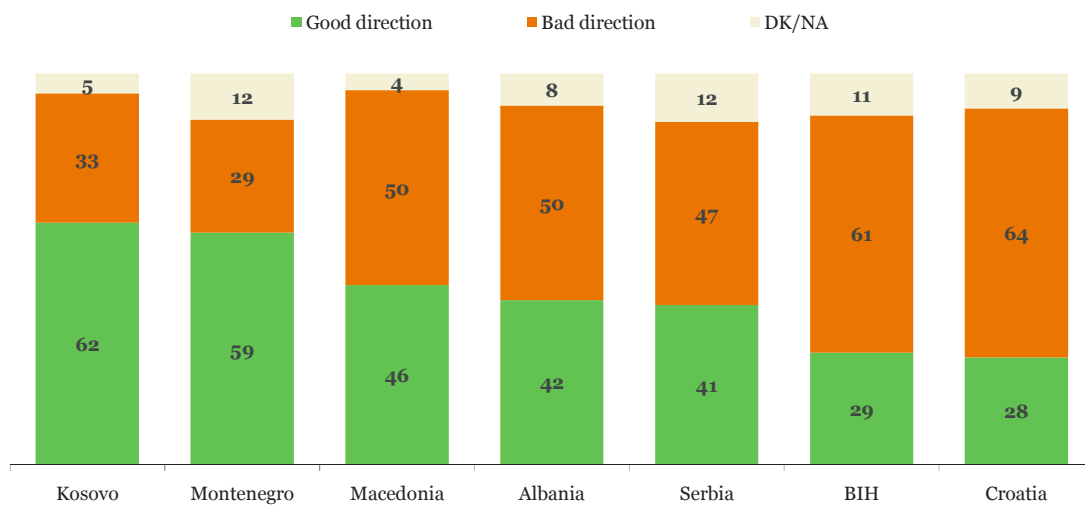
For example, **Kosovo Serbs were much less satisfied** with their lives than the **Kosovo Albanians**. Indeed, while approximately eight in 10 of the latter said they were happy with their lives (78%), only half of the former felt the same (50%). Eighteen percent of the Kosovo Albanians even declared themselves to be *very* satisfied, whereas this was only true for a handful of the Kosovo Serbs (5%). Almost half of the latter were dissatisfied with their lives (49%), and one in 10 even said they were not satisfied at all with their situation (9%). However, the Kosovo Serbs were also more likely than their Albanian counterparts to say they could get along on their household's income: whereas two-thirds of the Kosovo Serbs said they could get by financially (64%) and only one-third said they had difficulties in doing this (34%), the Kosovo Albanians were more likely to complain about financial difficulties (43%) and less liable to say they could get by (56%).

The Monitor also showed regional differences in Montenegro and Bosnia and Herzegovina. The respondents in the areas of Montenegro with an important Albanian population were less satisfied with their lives in general than respondents who came from the rest of the country (57% and 72%, respectively). In Bosnia and Herzegovina, respondents in the Federation were distinctively more likely to be satisfied with their standard of living than those interviewed in the Serbian-settled Republika Srpska (45% vs. 35%), but only slightly more liable to be happier with life in general (61% vs. 58%).

The future: a mixture of optimism and disenchantment

While **Kosovars** and **Montenegrins** were the respondents most frequently **predicting a bright future** for their countries, there was **pessimism in Croatia and Bosnia and Herzegovina**. Indeed, across the Western Balkan countries, only Kosovo (62%) and Montenegro (59%) had a majority of respondents thinking that things were going in the right direction. In the remaining countries, a majority were worried about their country's future. Pessimism was particularly widespread in Croatia (64%) and Bosnia and Herzegovina (61%), where approximately six out of 10 respondents thought their country was heading in the wrong direction and only around one-third took an opposite view.

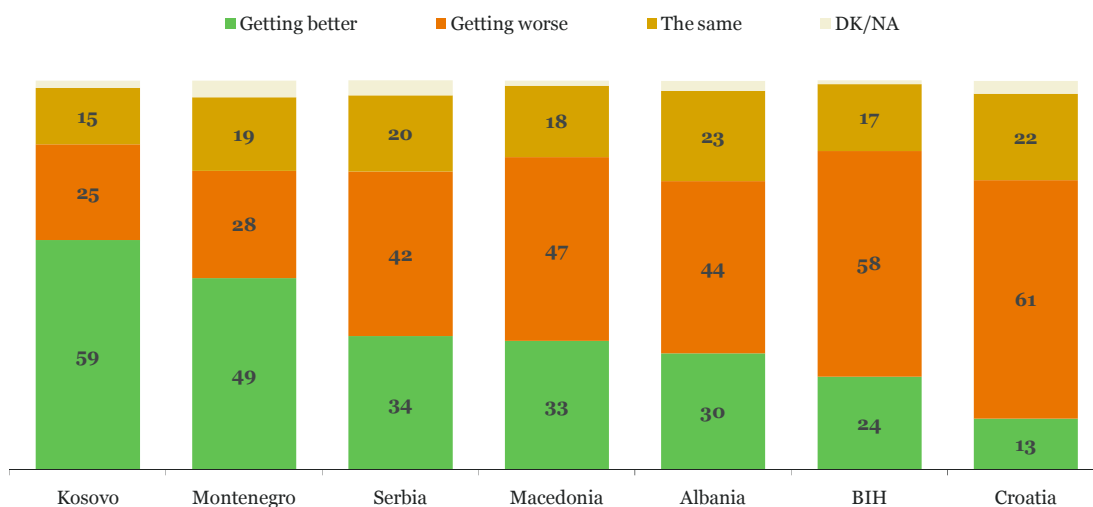
General development of country



What would you say in general things are going in a good direction or in a bad direction in this country?

Attitudes were strongly divided about the **development of the economies**. Only the Kosovars (59%) had a majority that thought that economic conditions in their country would improve, while Croatia (61%) and BIH (58%) were the only countries where a majority of respondents were pessimistic about the future. In Serbia, Albania and Macedonia the respondents who were worried (approximately 45%) outnumbered the confident ones (about one-third). The remaining proportion of the interviewees - approximately one in five - thought that economic conditions would remain the same.

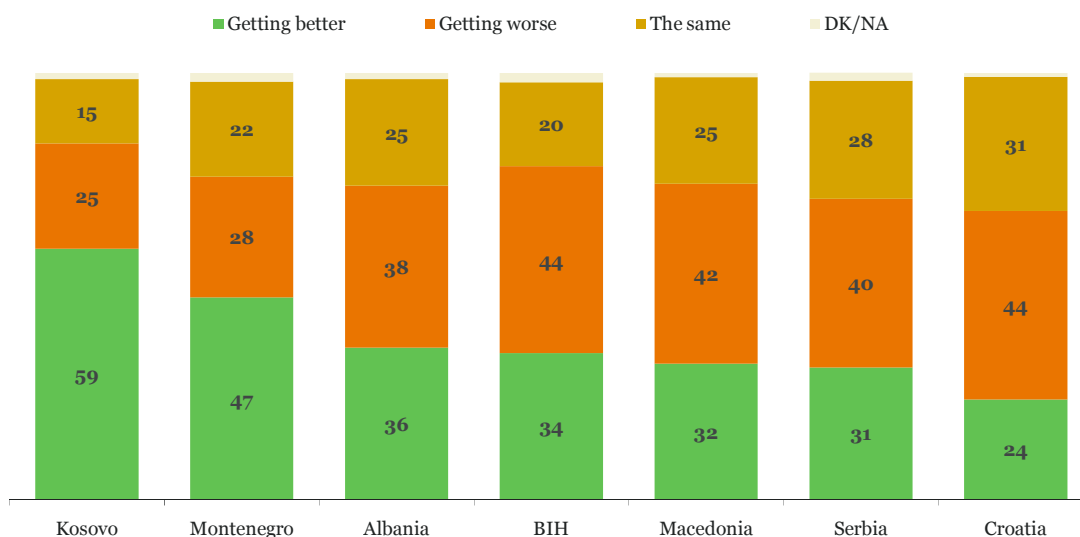
Development of country's economic conditions



Right now, do you think that economic conditions in this country, as a whole, are getting better or getting worse?

There were high proportions of respondents who expected **living standards** to improve in Kosovo (59%) and Montenegro (47%), whereas Croatia and Bosnia and Herzegovina had the highest share of respondents who thought the opposite (both 44%). It was not all gloom in Bosnia and Herzegovina, however, as it had approximately the same share of respondents who thought that their living standards would improve as the remaining Western Balkan countries: Albania, Macedonia and Serbia (approximately one-third in each).

Development of standard of living



Right now, do you feel your standard of living is getting better or getting worse?

The respondents' views about the future varied across the regions within all of the Western Balkan countries.

The differences were most striking **in Kosovo**, as **the Albanians were much more optimistic about the future than the Serbs**. For example, while approximately two-thirds of the Kosovo Albanians were optimistic that things in general were going in the right direction (68%), only one in 10 Kosovo Serbs shared that view (13%). The latter were far more frequently liable to be rather pessimistic (65%) about the country's development than the former (31%). In general, Kosovo Serbs were marked by a high level of uncertainty about the future: one in four respondents gave a "don't know"-answer (24%). In addition, while six in 10 Kosovo Albanians expected living standards to get better (61%), only one in five Kosovo Serbs did so (19%). The latter were most frequently saying that their standard of living would remain the same (47%), while only one in 10 of the Kosovo Albanians shared that view (13%). In both parts of Kosovo, a similar proportion of respondents who were pessimistic about an improvement in their standard of living (KA: 25%, KS: 28%).

In both **Macedonia** and **Serbia**, the interviewees in the areas of those countries mostly populated by nationals were seen to be more optimistic than those interviewed from the parts with an important ethnic minority population. For example, while four in 10 of the respondents from the areas with mostly Macedonian nationals thought that economic conditions in the country would get better (39%), only one in five respondents from the areas with a significant Albanian population did so (26%).

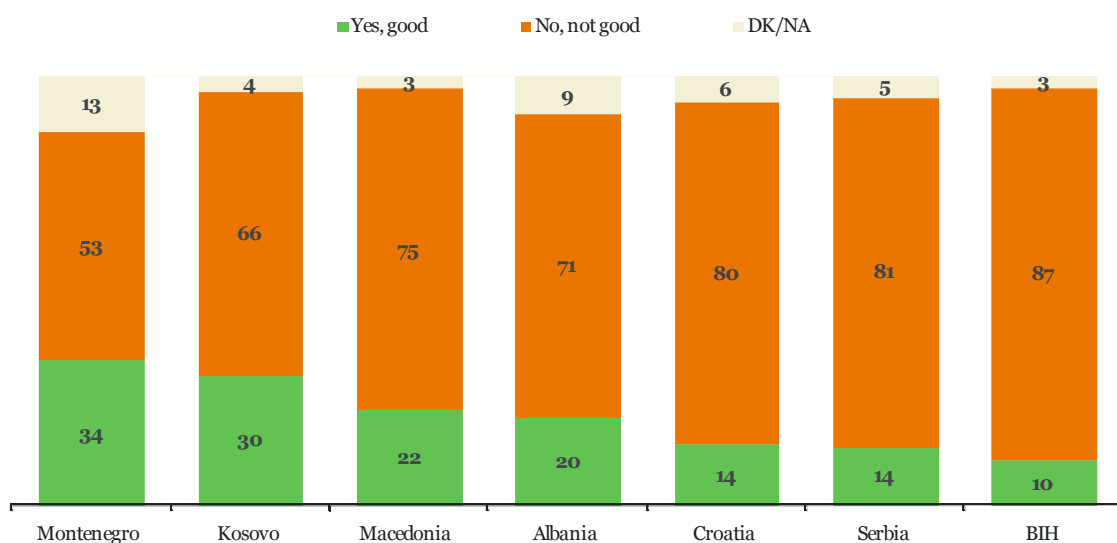
In **Montenegro**, however, the picture was reversed. The interviewees in those regions mostly populated by Montenegrin nationals proved to be more pessimistic than those living in the areas with a significant Albanian population. For example, 29% of the former expected economic conditions to get worse, while only one in six (17%) of the latter did so. Two-thirds of the respondents from the areas with a significant Albanian population thought that economic conditions would improve (52%), compared to 49% of the respondents from the rest of the country.

Economy and Work

Overall gloom about the Western Balkans' economy

Across the Western Balkans, a large **majority of respondents considered the economic situation in their country to be bad**. The people in Bosnia and Herzegovina were the gloomiest, as nearly nine in 10 respondents thought that their country's economy was not doing well (87%). In Croatia and Serbia, eight out of 10 respondents shared that view. Three-quarters of respondents in Macedonia said the same about their country's economy, as did seven in 10 Albanians and two-thirds of the respondents in Kosovo. Respondents in Montenegro gave the most positive assessment about their country's economy: while half of the respondents thought economic conditions were not good (53%), one-third were positive about the current economic situation (34%).

Current economic conditions



Do you believe the current economic conditions in this country are good, or not?

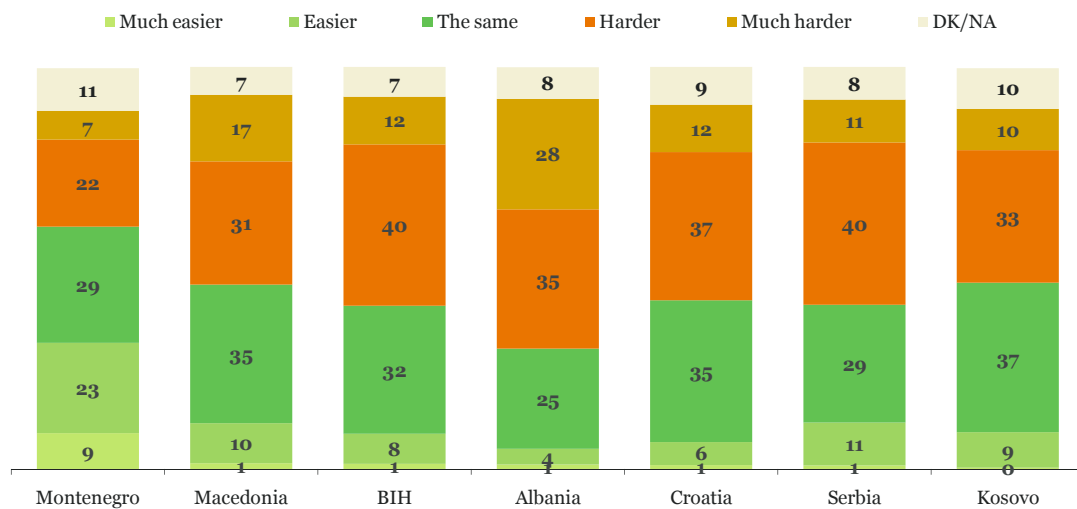
A feeling that the job situation was deteriorating slightly

In a majority of the Western Balkan countries, half or more of the respondents felt that the job situation was deteriorating. An important share of respondents (between a quarter and four in 10) saw no change in the job market compared to 12 months ago, whereas only a small minority thought that the job situation was improving.

Indeed, with the exception of Montenegro, respondents painted a gloomy picture: between 43% (in Kosovo) and almost two-thirds of respondents (63% in Albania) felt that it was harder to get a job today than one year ago. The job situation was particularly bad in Albania: approximately three in 10 respondents even said it was *much* harder to get a job today than it was one year ago (28%).

In Montenegro, the job market was assessed most positively out of all the Balkan countries: while one in three respondents saw no change in the job market, a quarter thought that jobs were found easier nowadays than one year ago (23%). One in 10 respondents in Montenegro even judged it to be much easier to get a job (9%), whereas in the other Balkan countries barely any respondent shared that view.

Easier or harder to get job than one year ago



Is it easier or harder now to get a job than a year ago?

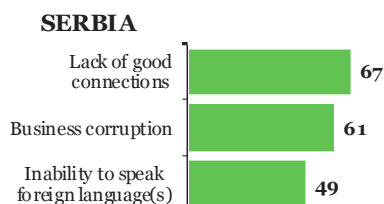
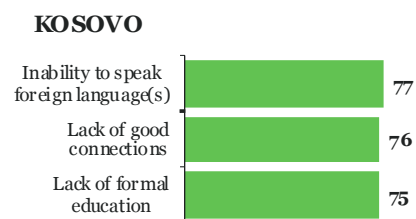
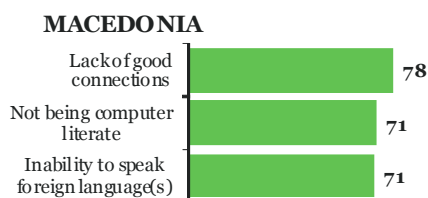
In **Macedonia**, the job situation was seen as being particularly bad by respondents from the areas with a significant Albanian population: half of them said that finding a job today was harder or much harder than one year ago (51%), while only four out of 10 from the rest of the country thought it was that bad (42%). In **Bosnia and Herzegovina**, respondents in the Federation judged today's job situation to be better than those from the Republika Srpska. More than one in 10 in the former said that it was *much* easier today to find a job now (12%), while only 4% of those from the Republika Srpska said so. Differences were only minor in the remaining countries.

Lack of good connections seen as the main barrier to advancement

Among a list of obstacles that could prevent them from getting a job or a better job, **respondents from a majority of the Western Balkan countries cited the lack of good personal connections as the main barrier.** Other major hurdles were seen to be the *inability to speak foreign languages, business corruption, a lack of formal education and job training and not being computer literate.* Across most countries of the Western Balkans, the *lack of transport to get to work and poor personal health* were the factors the least often mentioned as barriers that would keep respondents from getting a job or advancing in their careers.

Particularly in **Macedonia**, connections were seen as the most important component for finding a new or a better job: nearly eight in 10 respondents said that this was the missing ingredient in their

Barriers that prevent from getting a job or a better job, Top 3 mentions



Now, tell me which, if any, of the following are barriers that would prevent you from getting a job or getting a better job: % is a barrier

careers (78%). Next, Macedonians cited a lack of computer literacy and an inability to speak foreign languages (71%). For the three top-mentioned barriers, no significant differences for respondents from different areas of the country were found.

In **Kosovo** as well, approximately three-quarters of respondents referred to the lack of good connections as a major hurdle. About the same share of respondents mentioned their inability to speak foreign languages and the lack of formal education as barriers that kept from improving their career prospects.

The Kosovo Albanians saw more barriers than their Serb counterparts. Most strikingly, this was the case for the lack of formal education: eight in 10 of the former saw this as a barrier (77%) compared to a quarter of the latter (26%)

Two-thirds of the interviewees in **Serbia** thought they were missing the right connections when it came to job hunting. One in six also bemoaned the level of corruption in the business world and one in two mentioned their missing language skills. There were only a few differences across the various areas of the country. Business corruption, for example was seen as more of a problem by those living in northern Voivodina, than by those in the remaining parts of Serbia (67% vs. 61%).

In **Albania**, even if the lack of the right connections wasn't the most often mentioned barrier, it was mentioned by approximately two-thirds of respondents as a problem when they were looking for a job (64%). A similar share of respondents (65%) said they were not sure about *where* to find jobs. Above all, though, Albanians named the lack of a formal education (69%) as the main barrier.

In **Bosnia and Herzegovina**, the lack of good connections was also seen as the main obstacle to getting a new or better job (63%). As in Serbia, business corruption was high on the list of obstacles (55%), followed by a lack of formal education (47%).

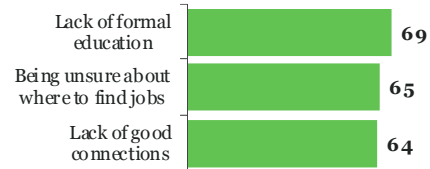
Respondents in Republika Srpska mentioned more difficulties when they were trying to find a job or a new job compared to those in the Federation: for example, in the lack of good connections (70% and 61%, respectively).

A majority of **Croatians** cited the lack of good contacts as a major obstacle to finding a (better) job (60%) as well. Half of the respondents said business corruption prevented them from getting a better job and just less than half mentioned the inability to speak foreign languages.

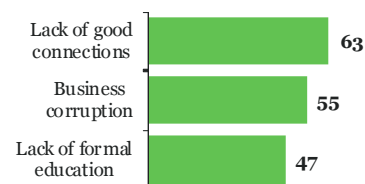
In **Montenegro**, the barriers that were most often cited were, again, the lack of good connections (48%) and a lack of language skills (47%). Around four in 10 respondents said they were lacking proper job training (43%). The interviewees in the areas mainly populated by Albanians saw more barriers than those interviewed in the remaining parts of Montenegro; six out of ten, for example, thought that they were lacking a proper job training, while four in ten of the latter thought that way (39%).

Barriers that prevent from getting a job or a better job, Top 3 mentions

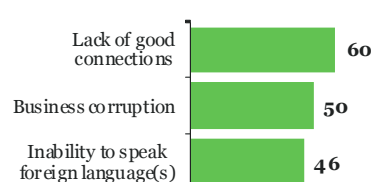
ALBANIA



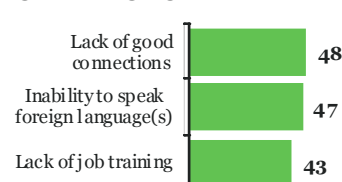
BIH



CROATIA



MONTENEGRO



Now, tell me which, if any, of the following are barriers that would prevent you from getting a job or getting a better job: is a barrier

Attitudes on political institutions

People of the region feel detached from politicians and the governments

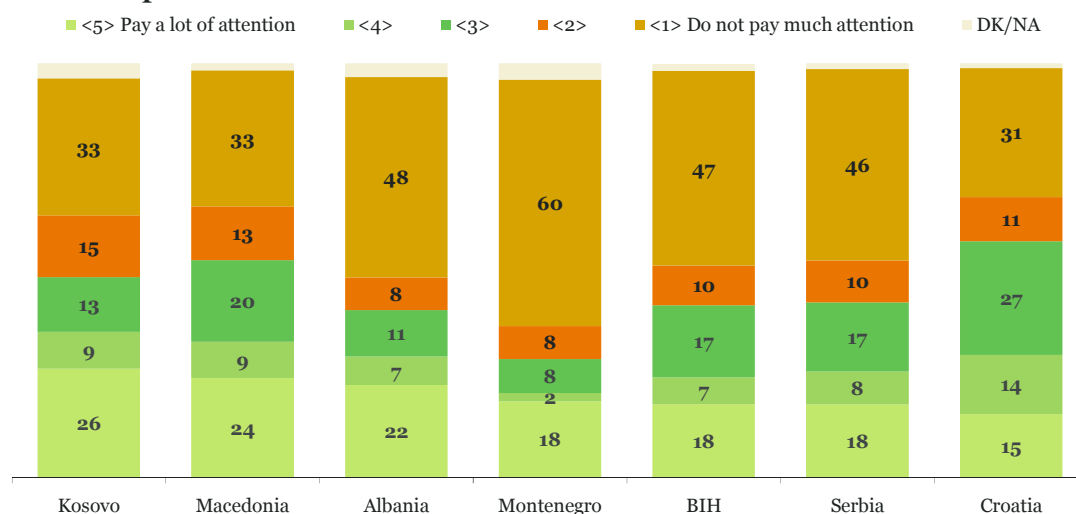
The results indicated that people in the Western Balkan countries felt somewhat remote and alienated from their political institutions.

The survey revealed that **interest in politics was rather limited**. Indeed, across the Western Balkan countries, respondents who paid little or no attention to current affairs outnumbered those who said they were interested in such matters: asked to rate how much attention they paid to current affairs on a scale of one to five, in most of the countries a majority indicated a low level of interest by choosing the two lowest levels possible. In Montenegro, in particular, a large majority of respondents (60%) said they didn't pay much attention to current affairs. In Albania (48%), Serbia (46%) and Bosnia and Herzegovina (47%), as well, nearly half of respondents indicated a low level of interest; in Kosovo, Macedonia and Croatia (31%), one-third of the respondents took a similar stance. The latter had the highest number of respondents who said they were interested to some degree (rank3: 27%).

Across the Western Balkan countries, between 15% in Croatia and a quarter of respondents in Kosovo (26%) and Macedonia (24%) said they paid a lot of attention to current affairs.

With only few exceptions, it was particularly the younger, female and lower educated respondents who said they were not following current affairs in their countries, while male, older and higher educated respondents were more likely to say they were very interested in those matters.

Attention paid to current affairs

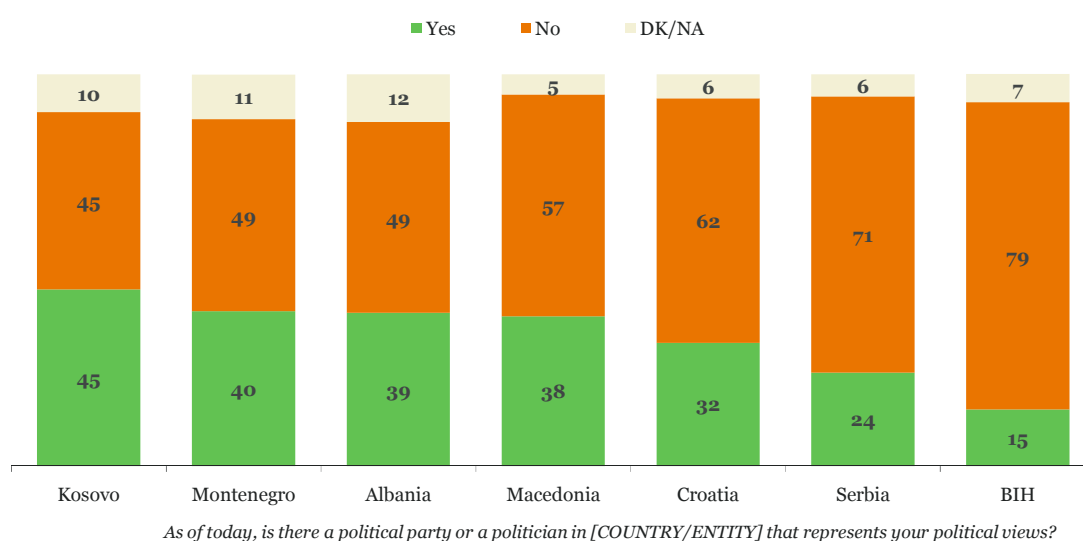


With respect to how much attention you pay to current affairs, would you say that you...

Political parties and politicians were only to a limited degree able to engage citizens: only a minority of respondents across the Western Balkan countries felt there was a political party or politician that represented their political views.

This feeling of disenfranchisement about the political world was found to be particularly strong in Bosnia and Herzegovina, where seven in 10 respondents denied that there was any party or politician representing their views; only 15% felt represented. Alienation towards the countries' politicians was also strong in Serbia, where seven in 10 respondents said there was no political representation of their interests in their country (71%) and only a quarter thought the opposite (24%). Kosovo had the highest share of respondents who felt well represented by a party or politicians (45%), while the same percentage of respondents took exactly the opposite view.

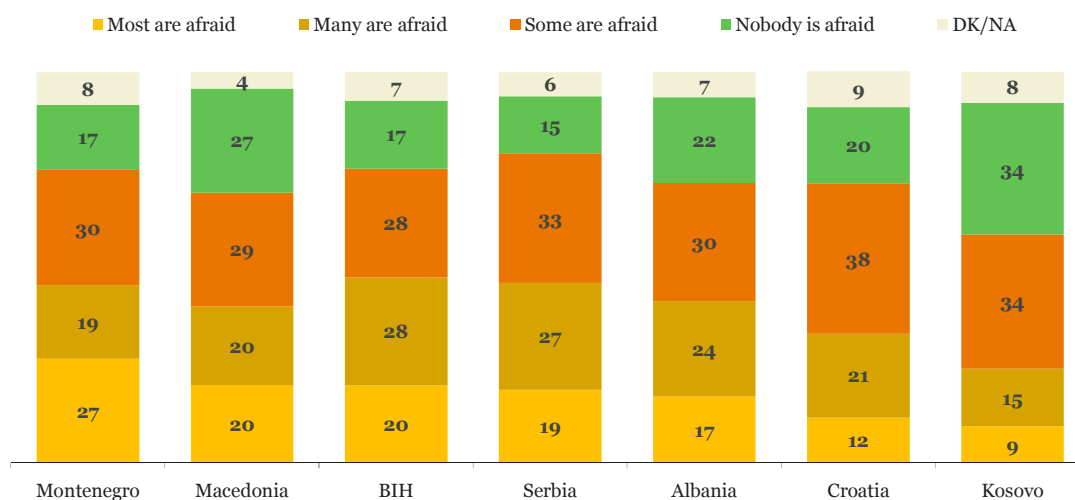
Political party or politician representing the political view of respondents



The survey even revealed a certain amount of concern about people's **ability to freely express their political views in the Western Balkan countries:** there were clear reservations regarding the possible consequences of public political discussions. Indeed, only a distinct minority of one-third or less thought that *nobody* in their country was afraid to voice their political opinions. Most respondents rather thought that at least *some* (approximately one-third across the countries), *many* (15%-28%) or even *most* (9-17%) of their fellow citizens were afraid to speak about their political ideas in public.

Kosovo had the highest proportion of people who thought nobody was afraid to speak out in public (34%), whereas this opinion was the least frequently aired by respondents in Serbia (15%). A disturbingly large minority – approximately a quarter – of respondents in Montenegro feared that most people in their country were afraid to air their political views. In Macedonia, Bosnia and Herzegovina (both 20%), Serbia (19%) and Albania (17%), approximately one in five respondents thought that most of their fellow citizens were afraid to express political views publicly; Kosovo (9%) and Croatia (12%) had the lowest proportions having such an opinion.

Democracy? Perception of the freedom of expression of political opinions in the Balkan



In your opinion, how many people in our country, if any, are afraid to openly express their political views?

In **Montenegro**, a quarter of respondents in the areas with an important Albanian population said they paid a lot of attention to current affairs (27%), while less than one in five of those in the rest of Montenegro did so (17%). Six in 10 of the latter opted to say they didn't pay much attention, while only four out of ten (41%) of the former did so. In Bosnia and Herzegovina, respondents from the Federation seemed to be more interested than those from Republika Srpska, as a greater proportion chose rank 5 (21% vs. 14%) and less chose rank 1 (37% vs. 59%). At the same time, six out of ten respondents from Republika Srpska believed that many or most people were afraid to openly express their political views; this concern was only shared by 43% of respondents in the Federation. In the northern part of Vodvodina, only half as many respondents thought that most people were afraid to freely express their political opinion than in the rest of Serbia (20% vs. 10%).

Respondents from the minority groups felt that they were better represented by politicians and their parties. Indeed, the interviewees from the parts of Montenegro and Macedonia with significant Albanian populations and those from the minority groups in Serbia more frequently said that there were political parties or politicians who represented their political views. Kosovo Serbs, however, were distinctively less likely to say they felt that they were being fairly represented than the Kosovo Albanians (23% vs. 49%).

Satisfaction with the governments – a polarised picture emerges

There were significant differences in the respondents' views about their national political institutions. The Western Balkans seemed to be polarised between the rather positive attitudes in the newly created countries of **Montenegro and Kosovo** and a visible disenchantment in **Croatia and Bosnia and Herzegovina**.

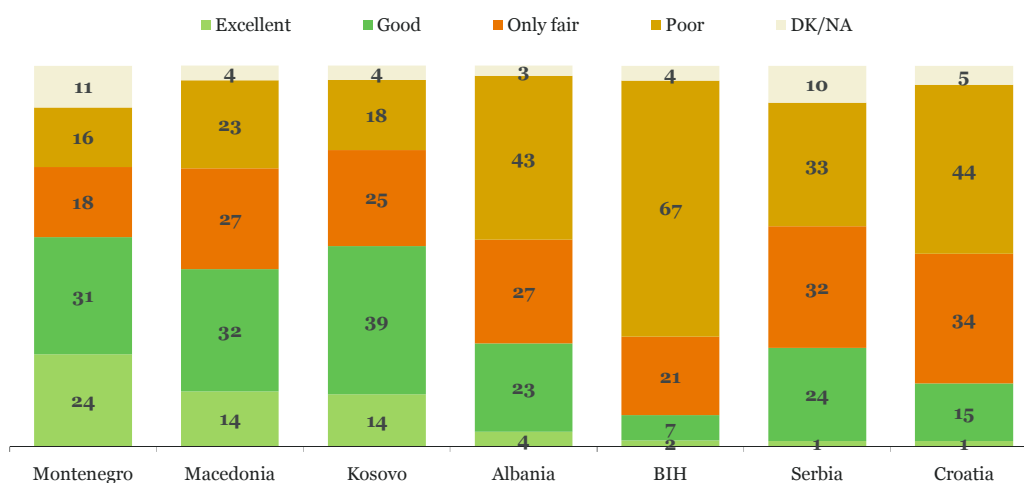
Indeed, only **Montenegro** (55%) and **Kosovo** (53%) had a **majority of the interviewees who spoke positively** about their government's performance. Satisfaction was particularly high in Montenegro, where not only one-third of respondents judged the government's performance to be good, but a quarter even considered it to be *excellent* (24%). Only one-third of interviewees thought that their government's performance was *poor* (16%) or *only fair* (18%). In Kosovo, while a majority of respondents were also positive, more of them were likely to judge the performance as *good* (39%) rather than *excellent* (14%). A quarter of the respondents in Kosovo thought the government was *only doing a fair job* and one in five felt performance was *poor* (18%).

In the other countries, a significant number **of respondents spoke negatively about their countries' governments**. For example, approximately four out of 10 Albanians (43%) rated the job their government was doing as *poor*. Serbs were divided with a quarter (24%) judging the performance to be *good* and an additional third (32%) saying it was *fair*. In Croatia, after a very close election, 44% judged the government performance to be *poor* and only 16% thought it was good or excellent.

Dissatisfaction, however, was the most blatant in Bosnia and Herzegovina. Two-thirds of respondents gave the worst grade possible by saying that the performance was *poor* (67%). One in five only judged it to be fair (21%) and just one in 10 said it was either *good* (7%) or *excellent* (2%).

Macedonia was divided with 46% judging the government performance to be good or excellent, compared every second respondent who thought it was only fair or poor.

Country Government ratings



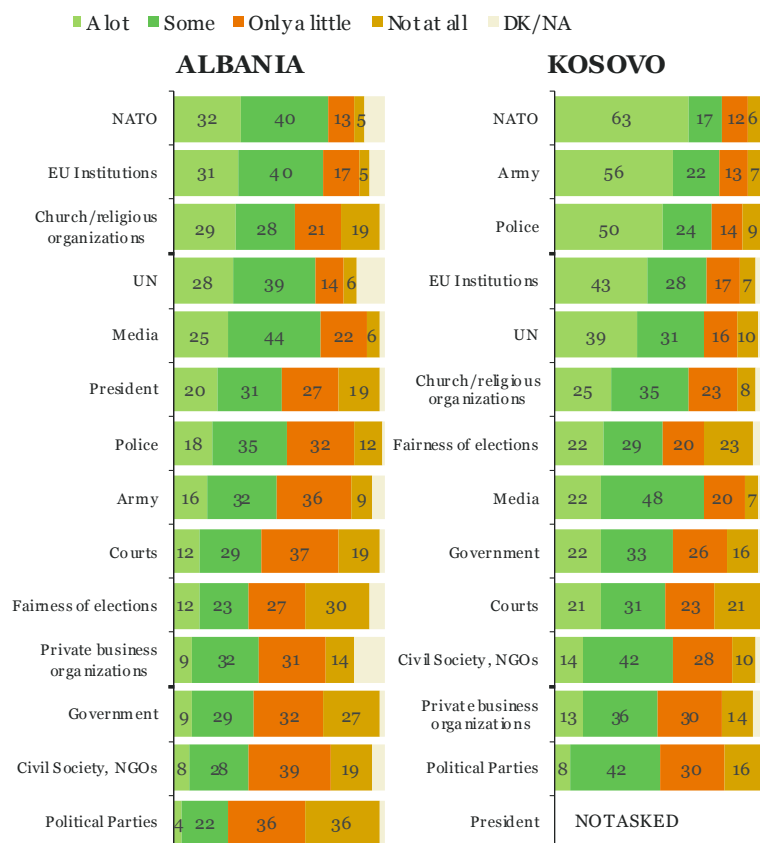
For each of the following levels of government, please indicate how good of a job the government does – excellent, good, only fair, or poor. [COUNTRY] GOVERNMENT

Greater trust in religious organisations, no faith in political parties

Participants in the survey were presented with a list of institutions like the church, the government, the president and political parties; they were then asked how much they trusted each organisation.

Generally, the respondents in the Western Balkans **did not show much trust in their countries' political bodies**. Indeed, the national political institutions only achieved a low-middle ranking in terms of trust; the church (and other religious organisations) came top in almost all of the countries.

Trust in institutions



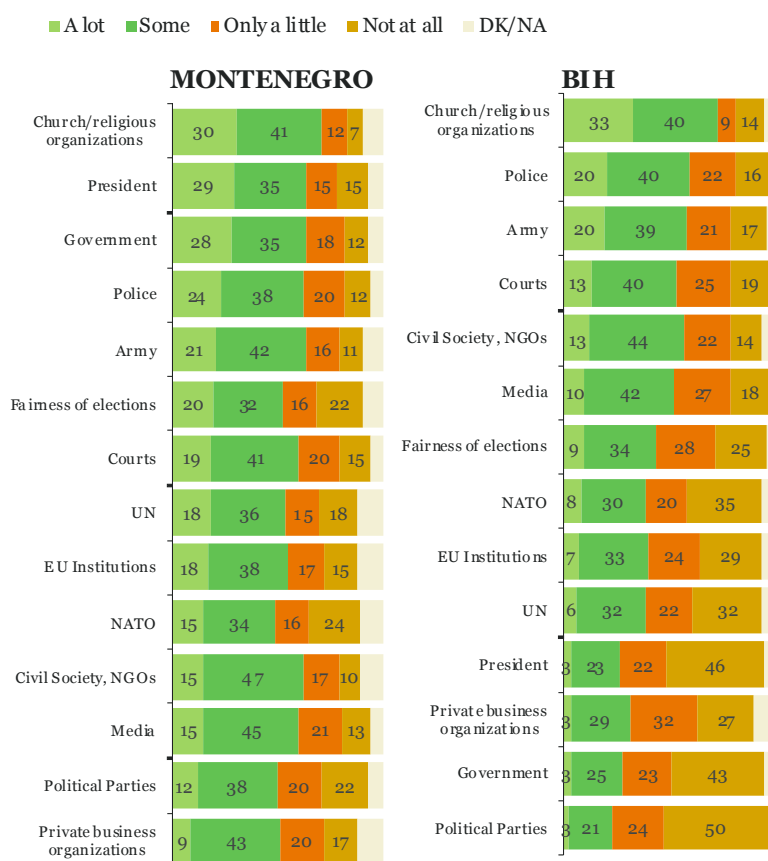
For each of the following institutions, please indicate how much trust you put in them.

¹ The respondents in Macedonia were the ones who put the most trust in the church and other religious organisations: one in two said they trusted such institutions a lot and nearly one-third said they had some trust in them. Only one in 10 respondents said they trusted the church a little (12%) or not at all (6%). Although there was still a majority who trusted the church a lot (25%) or to some degree (35%), such religious organisations were the least often trusted in Kosovo. It was the most actively distrusted in Albania, where one in five respondents said they had no trust at all in such institutions (19%).

² In Kosovo, two-thirds of respondents said they trusted NATO a lot (63%) and 17% had some trust in the organisation. One in 10 only trusted it a little (12%) and a handful did not trust it at all (6%). In Albania, the backing for NATO was weaker, but it was still the most trusted institution among those listed in the survey: one third of Albanians trusted NATO a lot (32%) and one in four had some trust in it (40%); only a few trusted NATO a little (13%) or not at all (5%). While in the remaining Western Balkan countries, NATO ranked in the middle of the listed institutions, the Serbian respondents were by far the most disapproving of NATO. Indeed, a majority did not trust it at all (53%), and one-fifth had only a little or some trust in the institution. Hardly anyone in Serbia trusted NATO a lot (1%).

Indeed, of all the Western Balkan countries, respondents from Montenegro were the most likely to have *a lot* (28%) or *some* (35%) trust in their government. One in five (18%) and one in eight (12%), respectively, only trusted the government *a little* or *not at all*. In Kosovo, a clear majority trusted the government *a lot* (22%) or to *some* degree (33%), while a minority had *only a little* (26%) or *no trust at all* (16%) in the government. In Bosnia and Herzegovina, on the other hand, barely any respondent had *a lot of trust* in the institution (3%) and just a quarter of respondents had *some* trust. Most respondents tended to indicate that they had *no trust at all* in the government (43%) or only a little (23%).

Trust in institutions



For each of the following institutions, please indicate how much trust you put in them.

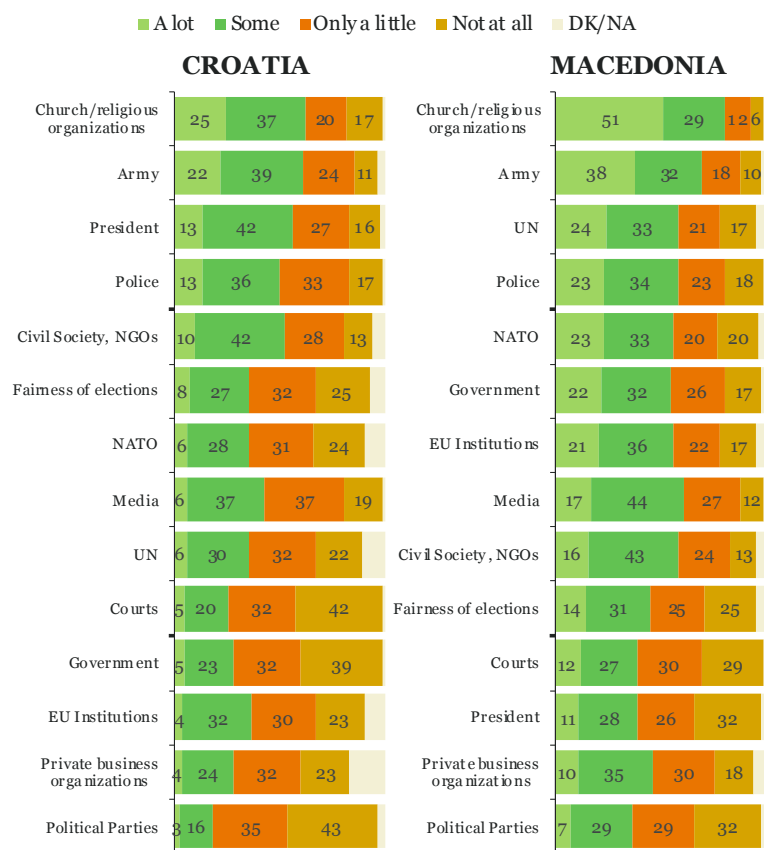
The distrust about the political parties in the Western Balkans was striking. Indeed, in most countries they were the most distrusted institution of all those presented in the survey. Once again, this distrust was the most visible in Bosnia and Herzegovina, where one in two respondents said they did not trust the party system *at all*. It was Kosovo that had the most respondents with confidence in the political parties: only one in six (16%) said they had no trust at all in the party system, whereas most had at least some trust in the parties (42%). However, Kosovo also demonstrated less trust in the political parties than in any of the other listed institutions.

A noticeable result of the survey was the very low level of trust in the **judicial system** in most countries in the region. At least “some” level of trust in the courts is a basic requirement of a well functioning society, but that is missing in most countries here. Croatia is experiencing a crisis with only a quarter of the people saying that they had either a lot (5%) or some (20%) trust in the courts. On the bright side, however, in Bosnia and Herzegovina, the respondents placed the courts among the five most trusted institutions.

The **army** was the most trusted organisation after the religious institutions in Serbia, Croatia, Macedonia and Bosnia and Herzegovina. In Kosovo, the army ranked second after NATO, reflecting the role these institutions have played in the recent history of the region.

Distrust in the political institutions also included scepticism about the election process. Across all countries, only a small minority trusted elections in their country to be fair; the share of respondents who had *a lot* of trust in the election process ranged from one in 10 in Croatia (8%) and Bosnia and

Trust in institutions



For each of the following institutions, please indicate how much trust you put in them.

Herzegovina (9%) to one in five respondents in Montenegro and Kosovo (22%). Most respondents expressed only *some* or *a little* trust in the fairness of elections. The percentage of those who had *no trust at all* in the elections was the lowest in Serbia (17%) and the highest in Albania (30%).

Differences in attitudes towards governments across the various regions were consistent for both the questions about the governments' performance and the amount of trust in those organisations.

Respondents living in the areas with an important Albanian population in **Macedonia** proved to be less happy with their government than those from the remaining parts of the country. While a majority of the latter were satisfied with the government's work (56%), and a minority dissatisfied (41%), seven in 10 respondents from the areas with a significant Albanian population were dissatisfied (67%); over a third (38%) even said the government's job was *poor*.

Macedonian nationals who had *a lot of trust* in the government clearly outnumbered the respondents from those areas with a significant Albanian population (28% vs. 9%).

In **Montenegro**, the picture was reversed: respondents from areas with an important Albanian population were far more satisfied with the government than respondents from the remaining regions. Indeed, over seven in 10 respondents from parts mostly inhabited by Albanians judged the government's performance positively (73%); 43% even said it was *excellent*. Only one in five spoke negatively about the government (21%). In comparison, only half of those living in the regions mostly inhabited by nationals felt their government's performance was either good (32%) or excellent (22%), while one in six (17%) said it was doing a poor job and one in five (19%) a fair job.

The same pattern was observed in regard to trust in the government: more of the Albanians in Montenegro trusted the government *a lot* in comparison to the nationals (33% vs. 28%).

In **Bosnia and Herzegovina**, the government 's performance was judged to be *poor* in the Federation part by a full 70%, and was only seen in a slightly better light in the Serb entity, where 56% regarded it as poor. Differences in trust, however, were only minor.

Good Governance and Corruption

The break-up of Yugoslavia in the early 1990s and the wars that followed have left a heavy burden on the people: the development of strong criminal networks and the rise of a “grey” sector of the economy. Today, the different “mafias” operating in the region have the reputation of being among the strongest in Europe and some of the most difficult to dismantle.

Subsequently, the high levels of corruption and organised crime are highlighted as some of the main problems in the Western Balkans and as issues that are difficult to eradicate. Some observers feel that the phenomena are so deeply rooted that they are now seen as a way of life.

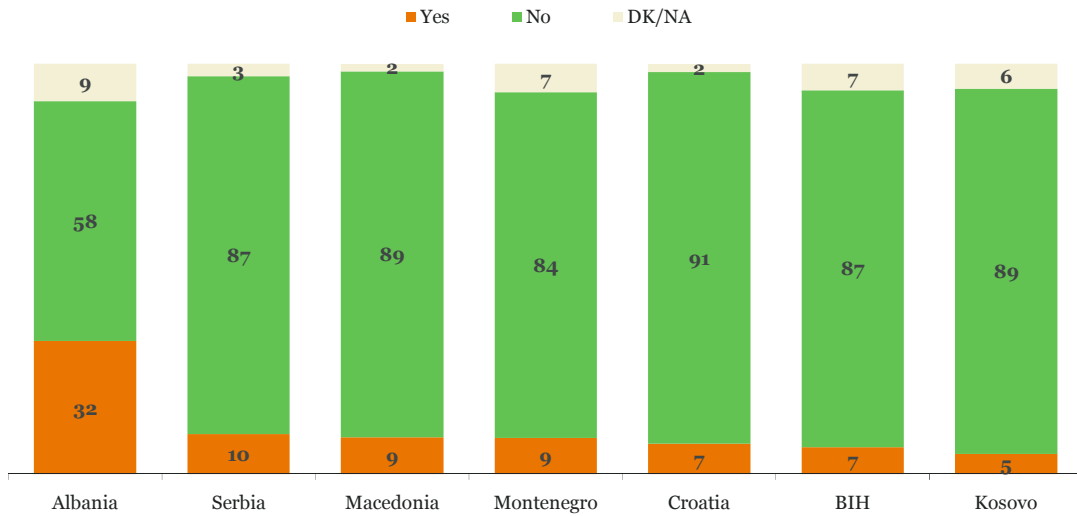
The *Gallup Balkan Monitor’s* examination of people’s attitudes towards corruption showed that it was not accepted by the majority; however, the results varied in the different countries and were dependent on the type of corruption being examined. The survey also highlighted the respondents’ general dissatisfaction with the development of their countries, reflected by their negative attitudes towards politics and the way in which they are being governed.

Reported levels of bribery low except in Albania

The survey results indicated that corruption was seen as a problem across all of the Western Balkan countries. For example, between 79% of respondents in Montenegro and 94% of those in Macedonia said that corruption should be eliminated in order to stabilise the region and facilitate future development. However, with the exception of Albania, the levels of bribery among government officials and civil servants that were actually reported were not particularly high. Indeed, across all of the Western Balkan countries, one in 10 or fewer respondents said they had had to offer a bribe to a government official or civil servant. In Albania, however, one-third of respondents had experienced such corruption (32%).

The officials asking for a bribe were most frequently reported to be **police officers** and personnel **from the medical services**. In Serbia, for example, more than half of all bribes were paid to police officers (54%), whereas this was mainly the case for doctors and nurses in Albania (50%).

Expecting bribe for the services by government officials or civil servants



During the past one year, has any government official or a civil servant in [COUNTRY], asked you or expected you to pay a bribe for his service?

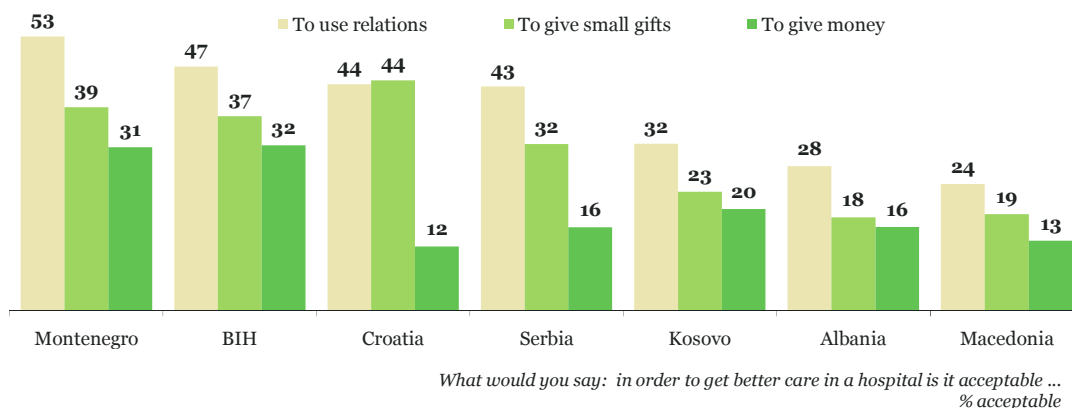
Minority populations consistently reported a greater need to pay bribes in order to obtain services from government officials. The reported levels of corruption were, for example, greater among the Kosovo Serbs (12%) than among the Kosovo Albanians (5%), and in northern Voivodina (14%) than in the rest of Serbia (8%). In Montenegro, a very high proportion of respondents from the Albanian minority parts refused to answer that question or gave a “don’t know” answer (29%). Out of those who did respond, 28% said they were expected to pay a bribe during the last year. This number was considerably lower among the Montenegrin majority population (9%).

A widespread conviction that corruption was unacceptable

Most respondents across the Western Balkan countries thought that corruption was an unacceptable phenomenon. Indeed, only a minority of respondents across the countries stated that it was acceptable to use the influence of relations, to give small gifts or to offer money in order to get better care in hospital, to ensure that their child went to a better school, to avoid paying a traffic fine or for small businesses to be able to get a profitable government contract.

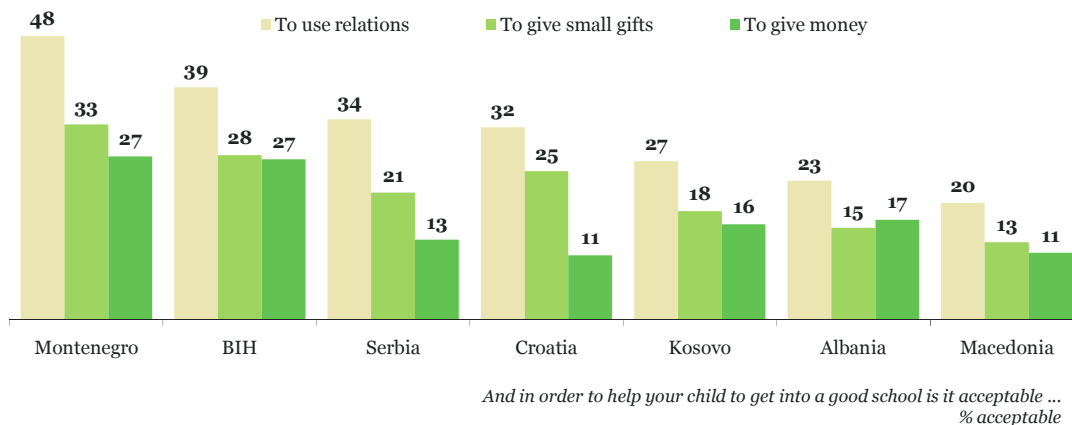
In Montenegro, however, corrupt behaviour in order to get things done seemed to be more tolerated than in the other Western Balkan countries. For all the scenarios listed in the survey, more respondents from Montenegro thought that corruption was acceptable; using the influence of relations in particular seemed to be more common, as a majority thought this was acceptable in order to get better care in hospital.

In order to get better care in hospital, is it acceptable....



The crucial element whether questionable behaviour was acceptable or not was **whether money was involved**. In general, using the influence of relations was far more accepted than giving small gifts or offering money. When it comes to paying money, respondents in Croatia and Macedonia had the lowest levels of tolerance. The former were for example nearly four times less likely to say that offering extra money in order to get better hospital care was acceptable compared to using the influence of relations for the same purpose (44% vs. 12%).

In order to help your child to get into a good school, is it acceptable....



The acceptance of using relations, however, also depended on the objective. *Personal health* and *children's' future* were domains in which more respondents considered questionable practices to be acceptable, compared with, for example, *avoiding paying traffic fines* or *for small businesses to get profitable government contracts*. For example, 43% of the respondents in Serbia thought that it was acceptable to use relations' influence to get better hospital care and one-third (34%) in order to ensure that their child got a place in a better school, while they were slightly less likely to think that way if the goal was for small businesses to get a profitable government contract (31%) or in order to avoid paying traffic fines (27%).

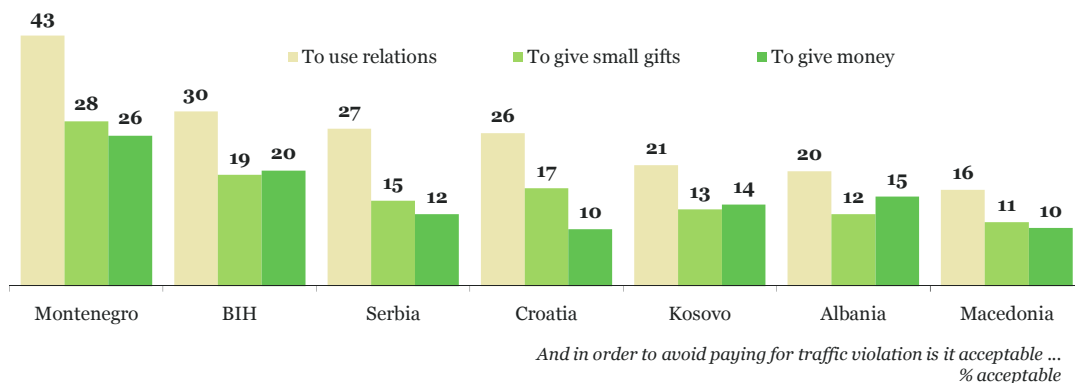
In order to get a profitable government contract, is it acceptable....



In **Macedonia**, respondents from the parts mainly inhabited by Albanians were more likely to think that corruption in any form was acceptable in all of the scenarios listed in the survey than the respondents from the remaining parts of the country. For example, one in five respondents from areas mostly inhabited by Albanians thought that giving money to ensure one got better care in hospital was acceptable (22%), while only one in 12 (8%) of Macedonian nationals did so. Within Serbia, it was the respondents from the regions mostly populated by Serb nationals who saw corruption as being more acceptable than those interviewees from the regions with important minority populations. As an example, compared to a general level of acceptance of 20% in Serbia that a private business offered small gifts in order to receive a profitable government contract, only 7% of respondents from northern Voivodina accepted this.

In **Kosovo**, the opinions about the legitimacy of using the influence of relations were split: Kosovo Serbs were more liable than the Kosovo Albanians to think this was acceptable; in order to avoid paying for traffic violations, for example, (41% vs. 19%).

In order to avoid traffic fines, is it acceptable....



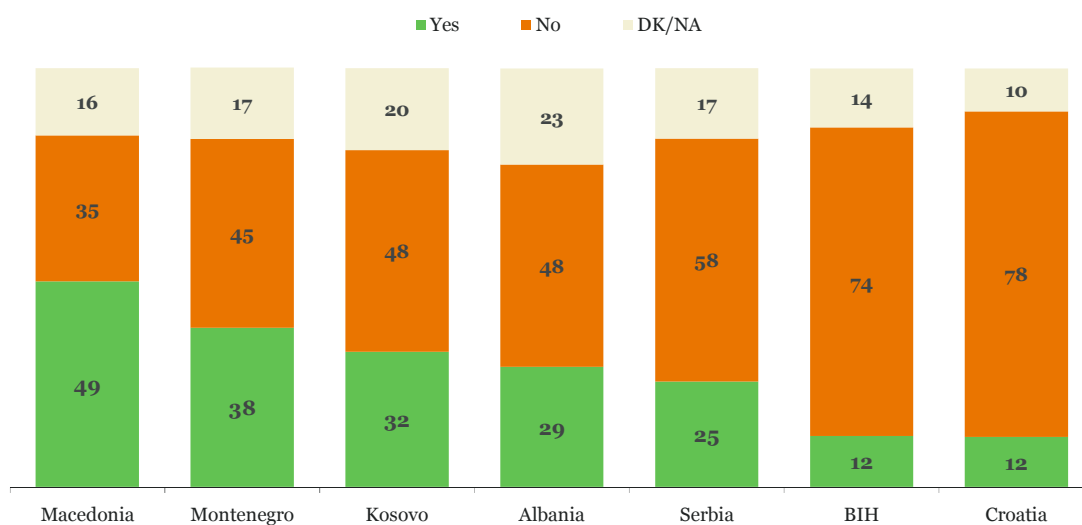
Governments must do more to fight organised crime

Across all of the Western Balkan countries, **only a minority of interviewees felt that their government was doing enough to fight it**. Macedonia was an exception, being the only country where supportive respondents outnumbered those who felt there were insufficient efforts to fight organised crime (49% vs. 35%). In Montenegro (45%), Kosovo (48%) and Albania (48%), nearly half of the interviewees were unimpressed by their government’s efforts to tackle organised crime efficiently, and only a minority of approximately three in 10 in Albania (29%), a third in Kosovo (32%) and one in four (38%) in Montenegro were convinced by their government’s actions.

While in Serbia, only a quarter of respondents thought there was sufficient resolve to fight organised crime (vs. six out of 10 who disagreed), **respondents from Bosnia and Herzegovina and Croatia were again the most critical about their governments’ actions**: around three-quarters found fault with their government and only one in 10 considered the actions to be sufficient (both 12%)

Across all Western Balkan countries, a **considerable share of respondents did not know how to answer** when asked to judge the government’s actions against organised crime. This was most often the case in Albania (23%) and Kosovo (20%).

Government against organised crime



Would you agree that the government is doing everything in its powers to fight organized crime?

Integration in the European Union

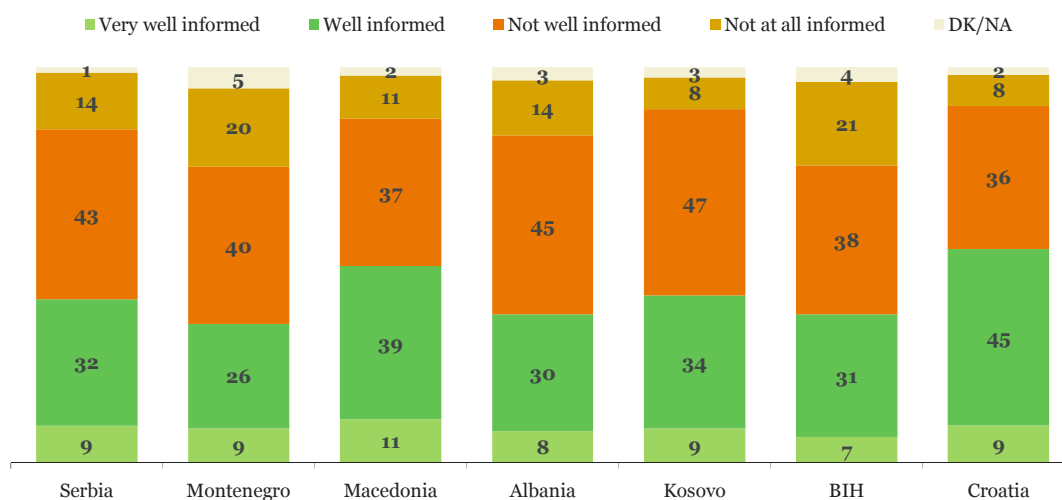
In the aftermath of the Irish rejection of the Lisbon Treaty earlier this year, the enlargement process has stalled and several member states have spoken out against the acceptance of new countries until the EU's own institutional impasse has been resolved. Nevertheless, and with the notable exception of Bosnia and Herzegovina, support for EU membership in the Balkan countries is still high.

Most respondents feel ill-informed about the EU

In most of the states of the Western Balkans, a **majority of respondents said they did not feel they had sufficient knowledge about the EU**. This negative view was particularly high in Montenegro and Bosnia and Herzegovina: approximately six in 10 respondents said they were not informed about the EU, of which one in five didn't feel informed *at all*. Only a minority of 35% in Montenegro and 38% in Bosnia and Herzegovina felt knowledgeable about the EU.

Macedonia and Croatia were the exceptions: in Macedonia, as many respondents felt they were sufficiently aware about the EU (50%) as those taking an opposite position (48%). In Croatia, a majority actually felt informed about the EU (54%) as opposed to a minority that lacked knowledge (44%).

Informed about the European Union



Please rate how much you are informed about the European Union?

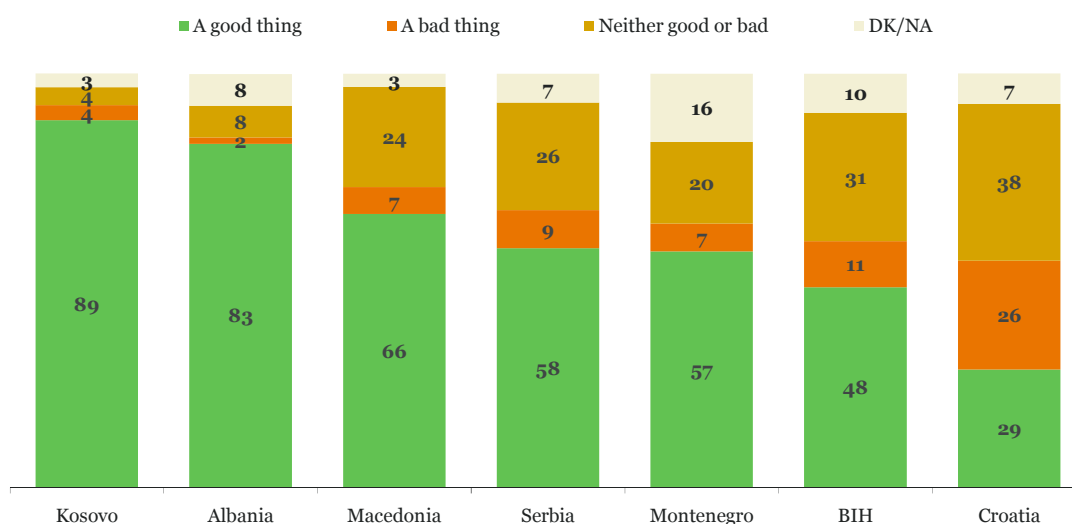
Croatia and Bosnia most sceptical about the EU

Looking at the responses to a series of questions about the EU and the eventual membership of the Balkan countries, a consistent pattern of attitudes could be seen: while respondents from Kosovo and Albania seemed to be eagerly looking forward to EU membership, those in Bosnia and Herzegovina and Croatia proved to be more cautious and sceptical about everything labelled “EU”.

For example, asked whether **membership of the EU would be a good or a bad thing**, nine out of 10 respondents from Kosovo answered positively and only a handful said it was either a *bad thing* or *neither good or bad* (both 4%). In Albania, more than eight in 10 respondents were upbeat about their country’s membership of the EU (83%), and only about one in 10 interviewees gave a neutral response. Hardly any Albanians thought that membership would be a *bad thing* (2%). In Bosnia and Herzegovina, however, only half of the respondents (48%) thought that membership of the EU would be *good* for their country, approximately one-third thought it would be *neither good nor bad* and one in 10 thought that it would be a *bad thing* (11%).

The respondents most sceptical about EU membership could be found in Croatia and Bosnia and Herzegovina: Croatia had the highest proportion of respondents who said that membership would be bad for the country (26%). However, the proportion of those who expressed a positive opinion about the possible consequences of EU membership (29%) was slightly higher than the number of sceptics. Most respondents expected membership to be *neither a good nor a bad* (38%). While only one in ten respondents in Bosnia and Herzegovina thought that membership in the European Union was bad for the country (11%), approximately one-third of respondents thought that it was *neither good or bad* (31%).

EU membership good or bad?



Generally speaking, do you think that [COUNTRY]’s membership of the European Union WOULD BE a good thing, a bad thing, or neither good or bad?

In Kosovo, Bosnia and Herzegovina and Macedonia, in particular, **significant differences** in the support for the countries' membership of the EU were seen **across regional and ethnic lines**. While Kosovo Albanians were almost unanimously positive about Kosovo's membership of the EU (95%), only one in 10 Kosovo Serbs shared that view (9%). In Macedonia, the interviewees from the areas mostly populated by Albanians were much more positive about EU membership (84%) than the respondents from the remaining parts of the country (57%). Within Bosnia and Herzegovina, it was the respondents from the Federation who were more supportive of the EU than those from Republika Srpska (61% vs. 35%).

Accordingly, respondents in Croatia and Bosnia and Herzegovina were the most negative about the **probable impact that membership of the EU would have on their countries' societies**, whereas the interviewees in Albania and Kosovo were the most positive about the accession's effect.

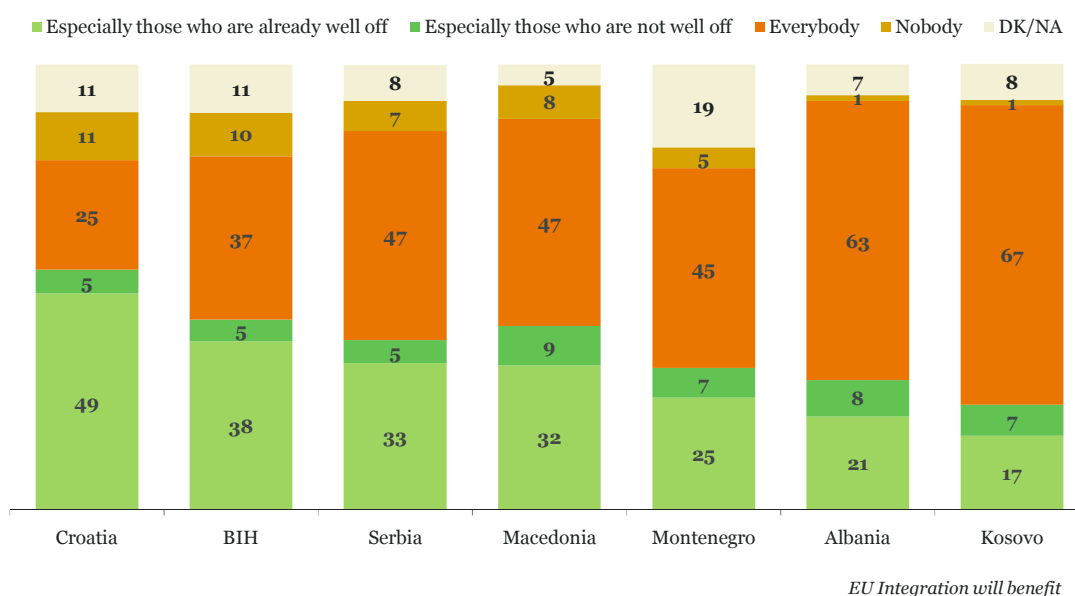
Indeed, when we asked the interviewees across the Western Balkans who they expected to benefit from EU membership, nearly half of the respondents in Croatia (49%) and 38% in Bosnia and Herzegovina thought that accession would predominantly benefit *those who were already financially well off*. Only a quarter of the participants in Croatia (25%) and slightly more than one third of those in Bosnia and Herzegovina thought that *everybody* would see an advantage (37%). In both countries, one in 10 respondents thought that *nobody* would benefit from the accession.

In Albania and Kosovo, the picture was reversed. Two-thirds of respondents in both countries shared the conviction that accession to the EU would bring benefits for *everybody* (Albania: 63%, Kosovo: 67%), while only around one in five thought that those who were already well off in particular would have advantages once their countries joined the EU (21%, 17%). Barely any participants in Albania and Kosovo thought that nobody would benefit from the integration (1%).

In Serbia, Macedonia (both 47%) and Montenegro (45%), almost one in two respondents thought that everybody would benefit from their countries accession to the EU. The interviewees who gave a positive outlook on the benefits of integration outnumbered therefore those who were negative; in Serbia and Macedonia, one-third thought those who were already financially well off would particularly benefit and in Montenegro, one quarter did so.

Hardly anybody mentioned benefits for the societies' most vulnerable groups. Across the countries, less than one in 10 respondents thought that those who were not financially well off would especially benefit. In Montenegro, in particular, many respondents did not know how to judge the possible impact of the accession to the EU (19%).

Who benefits from integration



This polarisation of opinions was also seen in regard to the levels of **trust in the EU Institutions** (see charts on page 25ff). With more than four in 10 respondents in Kosovo (43%) and nearly one-third of respondents in Albania (31%) who had *a lot of trust* in the EU-institutions, these two countries had the most faith in the EU institutions. In both countries, only one in six (17%) said they only had *a little trust* and a handful had *no trust at all* in the EU organisations (Kosovo: 7%, Albania: 5%).

Bosnia and Herzegovina was again found among the countries with a rather negative attitude towards the EU. Few of its respondents had a lot of trust in the EU institutions (7%), while one-third had *some trust* (33%) and one-quarter *only a little trust*. Three in 10 respondents felt *no trust at all* in the EU. The **confidence levels towards the EU institutions were the lowest in Croatia**, where respondents who said they trusted the EU institutions *a lot* were rare (4%), and respectively three in ten had only *some* (32%) or *little* trust (30%) in the institutions of the European Union. Approximately one quarter said they had *no trust at all* in them (23%).

The respondents in Serbia, however, were very similar to Croatians regarding trust in EU institutions. While only a handful said they had *a lot of trust* (6%) and approximately one third had *some* trust (35%), over a half had *only a little* (26%) or *no trust at all* in the institutions (25%).

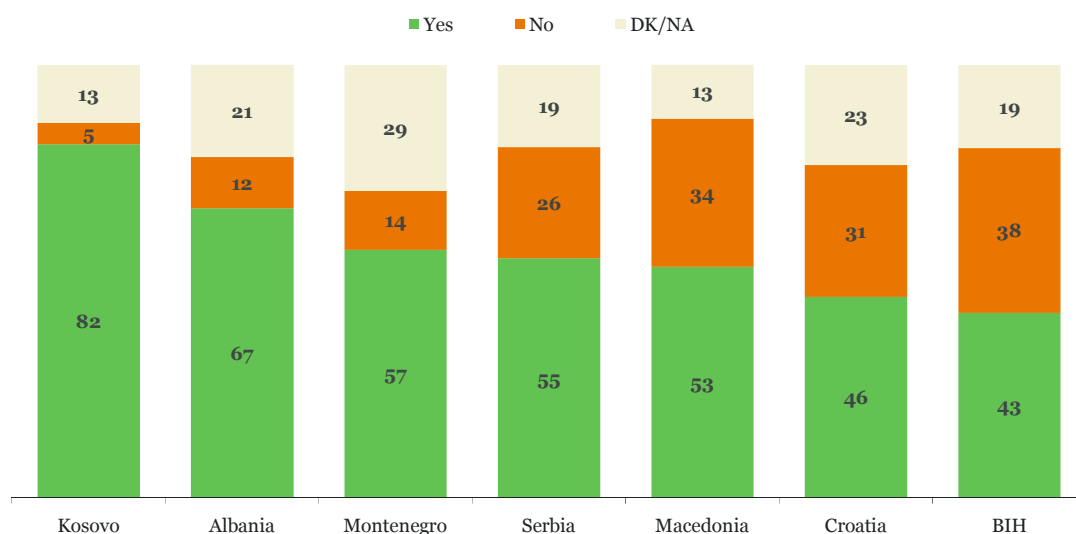
On the road to EU membership

Respondents in Kosovo and Albania were the ones who felt most wanted by the EU. Indeed, eight in 10 respondents from Kosovo (82%) and two-thirds of respondents from Albania (67%) agreed that their country was welcome at the political level and only a small minority disagreed (5% in Kosovo and 12% in Albania). With just slightly more than four in 10 respondents who felt the European Commission wanted their country to become an EU member, respondents from Croatia (46%) and BIH (43%) felt the least welcomed. In the remaining Western Balkan countries, Montenegro (57%),

Serbia (55%) and Macedonia (53%), a majority thought that their country would be welcomed in the EU at the political level.

Uncertainty on this question was quite high in all of the countries: between 13% in Kosovo and Macedonia and 29% of respondents in Montenegro either did not know how to judge the European Commission’s attitude towards their country or refused to answer. However, looking only at those respondents who gave an opinion on that matter, we saw that even in Croatia (60%) and Bosnia and Herzegovina (53%), a majority of respondents thought that the Commission wanted their country to become a member of the EU.

Does European Commission want [country] to join?



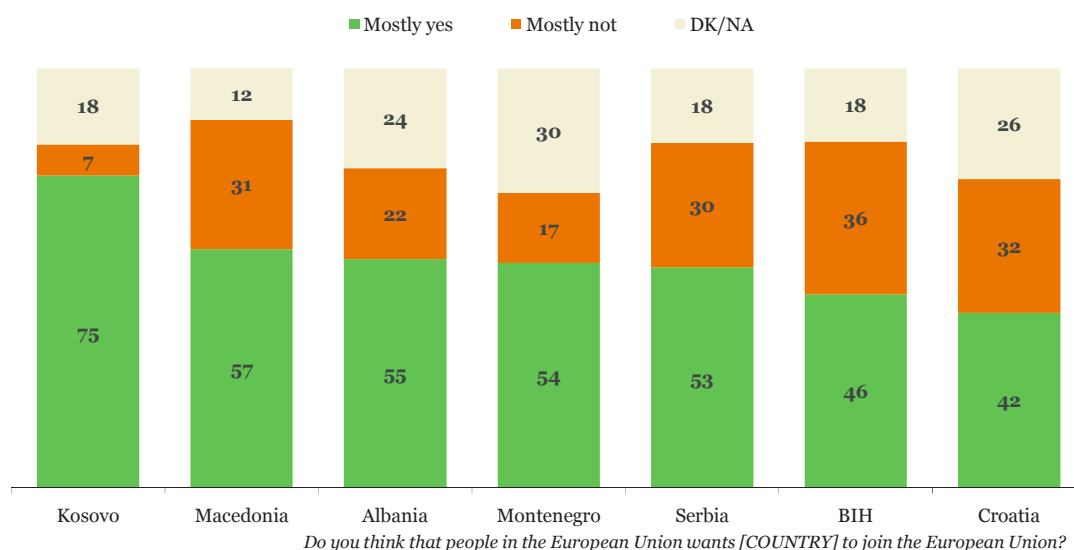
Do you think that the European Commission wants [COUNTRY] to join the European Union?

These **differing opinions and uncertainty** about EU accession were also reflected in the respondents’ judgments **about the attitudes of EU citizens**.

Again, with the exception of Croatia and Bosnia and Herzegovina, a majority of respondents thought that EU citizens would like their country to join the Union. In those two countries, however, only slightly more than four in 10 respondents shared that view (Croatia: 46%, BiH: 43%). Additionally, a significant number of people didn’t know how to judge the EU citizens’ attitude towards their country’s accession or refused to answer (between 12% in Macedonia and 30% in Montenegro).

However, **respondents felt they would be less welcomed by EU citizens than by the European Commission**. This was especially true in Albania, where only 55% of respondents felt that EU citizens would like their country to join the Union, compared to two-thirds (67%) who felt they would be welcomed by the European Commission. In Kosovo as well, respondents felt that the EU citizens were less welcoming than the Commission (75% vs. 82%). Exceptions to this were Macedonia and Bosnia and Herzegovina, where slightly more respondents felt welcomed by the people than by the Commission (Macedonia: 57% vs. 55%; BiH: 46% vs. 43%).

Do Europeans want [country] to join?



In **Macedonia**, around seven in 10 respondents (73%) from the areas mostly populated by Albanians felt that their country was wanted by the Commission and approximately two-thirds thought that they would be welcomed by EU citizens (64%), while the interviewees in the remaining parts of Macedonia were less certain: 43% felt welcomed by the Commission and half of the respondents felt the same about the views of the EU citizens (51%).

In **Bosnia and Herzegovina**, there were considerable differences across the regions, too. More than half of the respondents in the Federation thought that the Commission (52%) or EU citizens wanted them to join (58%), while only 30% of respondents in the Republika Srpska held the same opinion.

A majority - with the exception of BIH and Croatia – were satisfied with their countries’ progress in meeting the EU’s accession criteria

The participants in the survey were presented with a list of accession criteria imposed by the EU on the candidate countries and potential candidates and asked how important they thought it would be for their country to meet each of those criteria for joining the Union; those were “adapting laws and regulations to EU requirements”, extraditing all suspected war criminals to the International Criminal Tribunal for the former Yugoslavia (ICTY)³, “settling disputes with neighbouring countries” and “creating favourable conditions for foreign investment”. In a following question, they were asked to judge how far their country had progressed in fulfilling those requirements.

³ This item was not asked in Albania and Macedonia

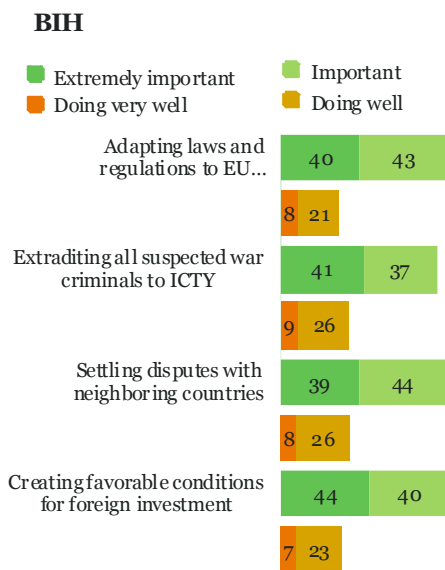
A large majority of the respondents agreed that all of the four listed accession criteria were important. Indeed, the share of respondents who thought that those requirements were important ranged from two-thirds in Montenegro who agreed that all suspected war criminals should be extradited (68%) to nearly all respondents in Kosovo who shared this opinion and who thought that laws and regulations should be adapted to EU standards (96%).

Even if only slight differences were visible between the assessment of the items, respondents (from those countries, where this was relevant) considered the extraction of suspected war criminals to be the least important matter whereas the adaption of laws and regulations and the creation of favourable conditions for foreign investment were generally seen to be crucial. For example, in Montenegro, nearly eight in 10 respondents considered the adoption of laws and foreign-investment-friendly policies to be important, while two-thirds of respondents thought the same about settling disputes with neighbours and only one in seven for the extradition of war criminals (68%).

In most of the Western Balkan countries, a majority of respondents judged the progress that their country was doing in meeting those requirements to be positive. For example, six out of 10 Albanians thought their country was doing well or very well in adapting laws and regulations, creating favourable conditions for foreign investment (59%) or settling disputes with neighbouring

countries (67%). However, in Croatia and Bosnia and Herzegovina, a deep dissatisfaction with their governments' performance was again observed: in those two countries, only a minority judged progress to be satisfactory.⁴ Serbs were divided on their country's performance: only slightly less than half of respondents said their country was doing well or very well in meeting the EU's requirements.

Importance and respect of accession criteria



*In your opinion how important a role do the following play in [COUNTRY]'s ability to accede to the EU?
How well is your country doing with respect to them?*

In general, the frequency of respondents saying that the EU's accession criteria were important was greater than the number reasoning that their country was making good progress in meeting those same criteria.

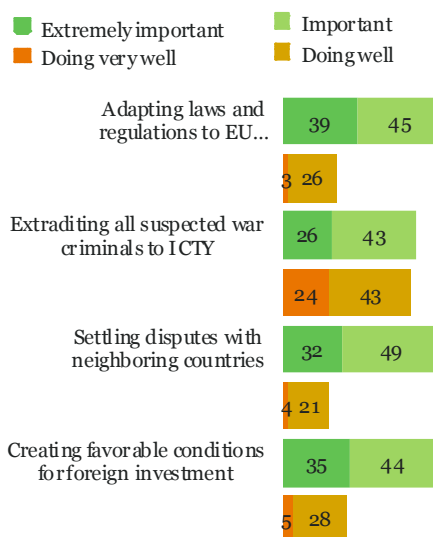
With the respondents' great dissatisfaction with the country's progress, this tension was particularly striking in Bosnia and Herzegovina:

⁴ With the exception of "extradition of war criminals" in Croatia which was judged by a majority of respondents as being no longer an issue.

Only a minority of approximately one-third of respondents thought the country was advancing well, whereas eight out of 10 or more respondents judged extradition of suspected war criminals (78%), the harmonisation of laws (83%), the ending of disputes (83%) and the encouragement of foreign investment (84%) as being important or extremely important. Approximately four in 10 respondents even considered progress in those domains to be *extremely* important, whereas less than one in 10 thought the country was advancing *very well*.

This deep disenchantment was also obvious in **Croatia**. For example, **only a quarter and a third, respectively, of respondents thought the country was making good progress** in settling disputes with the neighbouring countries and creating favourable investment conditions, while approximately eight out of 10 respondents thought that those were important or extremely important points. Additionally, only a handful of respondents said that their country was doing *very well*. However, the Croats agreed that they were doing well regarding the **extradition of war criminals**: nearly seven in 10 respondents (67%) said their country was doing well (43%) or *very well* (24%) in fulfilling this requirement.

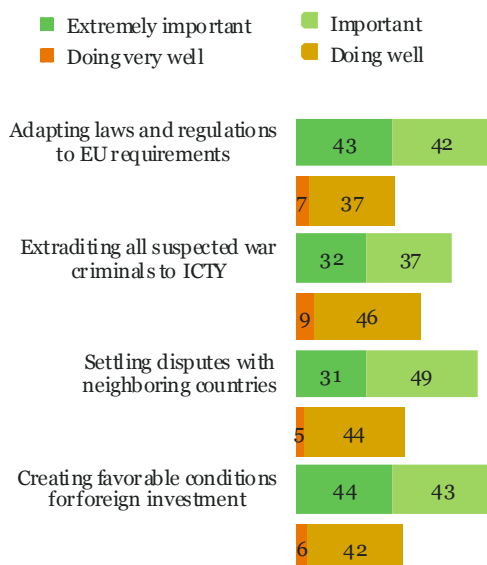
CROATIA



In **Serbia**, approximately half of the respondents thought that their country was progressing well; a majority agreed that the identification and handing over of war criminals (55%) was on a good

way, while seven in ten thought that this was an important or extremely important point to fulfil (69%). While there was widespread agreement that the adaption of laws and regulations was important or extremely important to meet the EU’s requirements (85%), only a minority felt that Serbia was doing good progress in that matter (44%).

SERBIA

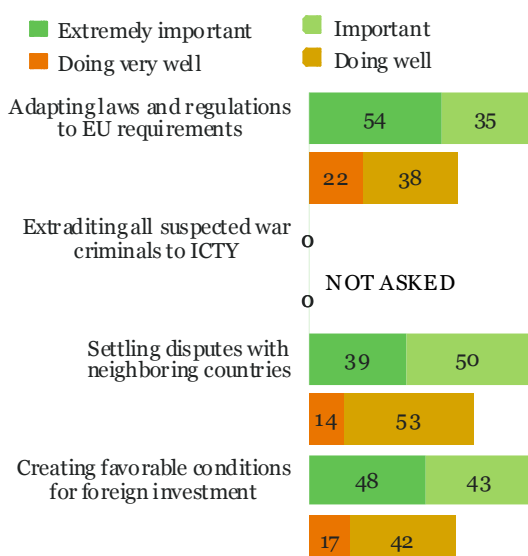


In Macedonia, a majority of respondents were satisfied with the country’s efforts to harmonise laws (65%) and create favourable conditions for foreign investment (59%) – EU requirements whose importance was uncontested (all three: 95%).

However, respondents were disappointed about the settling of disputes with neighbouring countries, as only a minority of four in 10 respondents thought there was sufficient progress (41%).

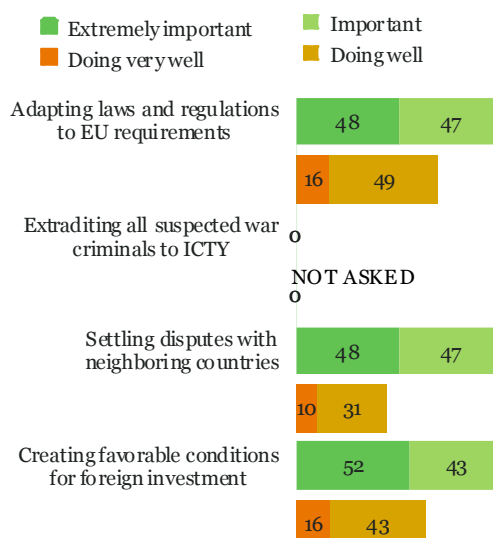
A majority of **Albanians** were satisfied with their country's efforts in all of the mentioned domains, particularly in regard to the improvement of neighbourly relations (67%). Around six in 10 thought that the adaption of laws was progressing and that enough efforts were being done to create better conditions for foreign investment in Albania (59%). Approximately nine out of 10 respondents considered all of the domains to be important.

ALBANIA



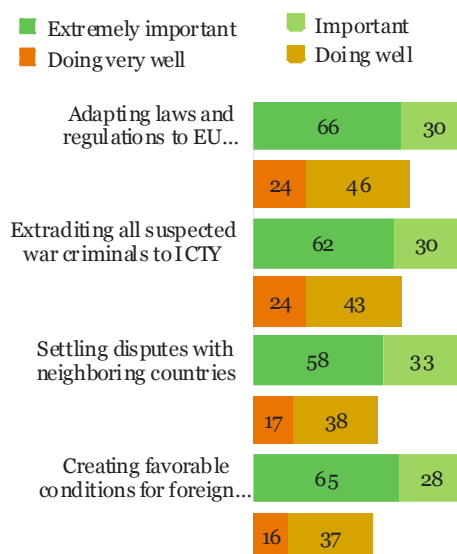
At the same time, a majority of respondents from Kosovo were satisfied with the government's efforts. Seven out of 10 respondents considered the harmonisation of laws to be progressing well and two-thirds thought that sufficient efforts were being made in regard to the extradition of all suspected war criminals to the ICTY. More than half of respondents were satisfied with Kosovo's progress concerning the settlement of disputes with neighbouring countries (55%) and the creation of an economic environment that attracted foreign capital (53%).

MACEDONIA

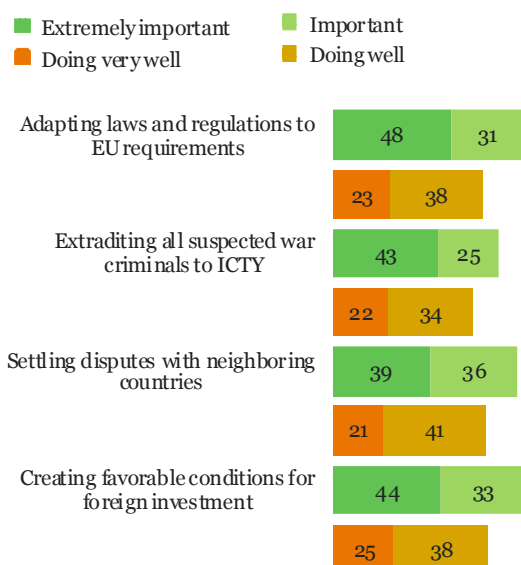


Respondents in **Kosovo** placed great importance on the fulfilment of the requirements. Indeed, more than nine in 10 respondents thought that it would be important for their country to work in those domains if it wanted to join the EU and six in 10 or more respondents even thought that the fulfilment of those requirements was *extremely* important. Respondents gave most weight to the harmonisation of laws with EU regulations (66%) and the improvement of conditions for foreign investment (65%).

KOSOVO



MONTENEGRO



The interviewees in **Montenegro** showed great consistency in both their views on the importance of the EU's accession requirements and on the efforts being made to fulfil them and showed therefore their feeling that accession requirements were to a good part accomplished. Between seven and eight out of 10 respondents felt that it was important for their country to work on the various topics and approximately six out of 10 thought that their country was making good progress in meeting those requirements.

Looking at the assessments of the country's progress in the different domains, the respondents saw the least progress in the handling of suspected war criminals (56%). This topic, however, was also considered to be the

least importance in terms of accession to the EU (68%).

The findings also reveal a lingering ambiguity in the region regarding the handling of war criminals: while still a majority of respondents across the countries thought that the thorough prosecution of war criminals was very important for the countries' advancement, the societies were split on the question whether everything that was possible in that respect was already done.

Great uncertainty across the Balkan countries in terms of dates for accession to the EU; Croats expected the earliest entry date

Across all of the participating countries, a significant **share of respondents couldn't even guess a date when asked when their country would be joining the EU**. This feeling of uncertainty was highest amongst the respondents from Montenegro: approximately four out of 10 "did not know" or refused to answer (38%). In Bosnia and Herzegovina (30%), Kosovo (28%) and Albania (27%), around three in 10 respondents gave the same response, as did a quarter of the interviewees in Serbia and Croatia (both 26%). The respondents in Macedonia, felt the most confident in naming a date: only one in eight (13%) said they didn't know when their country would become an EU member.

Croatia had the most respondents who **expected their country's imminent accession to the EU**. Indeed, one in five of them thought their country would be accepted as an EU member in either 2010 or 2011, and a quarter had the year 2012 in mind when they thought about accession to the EU. Less than one in 10 respondents thought that the country would never join the EU (8%)

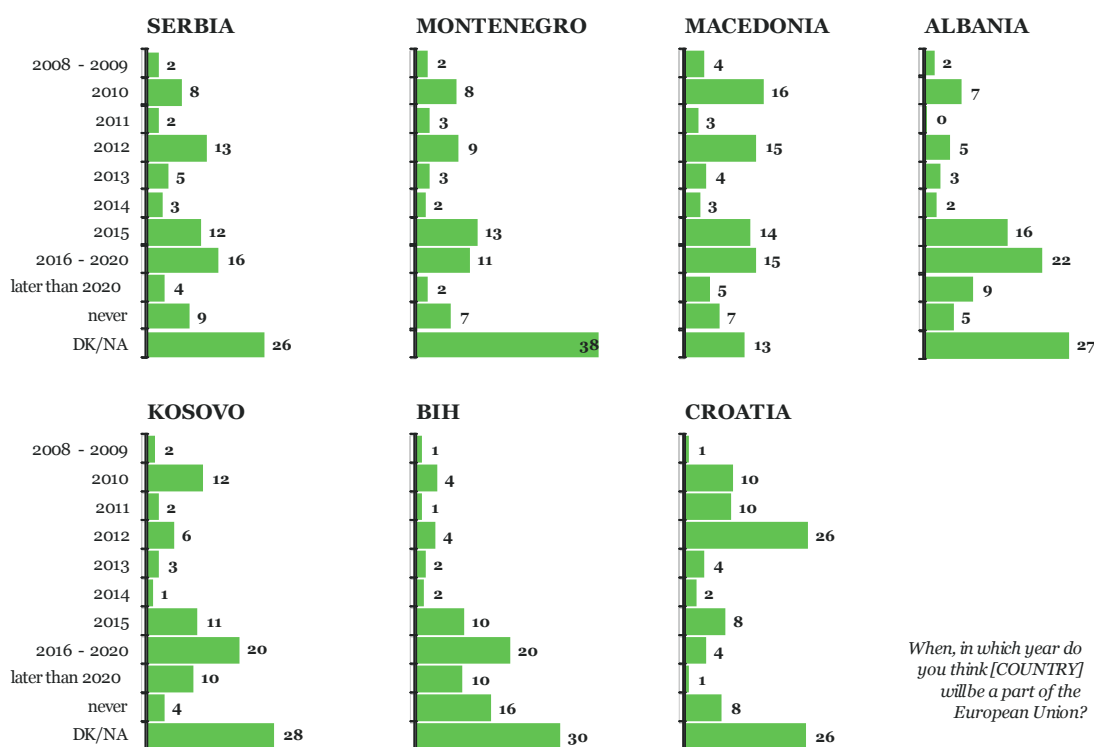
Macedonia also had many interviewees who thought the country would join the EU in the near future: one in seven (16%) thought their country could be welcomed into the Union by 2010 and an

additional 4% even felt the country would join before 2010. One in seven (15%) foresaw 2012 as the likely date and a similar number (14%) saw 2015 as the most probable timing.

Slightly more than one in 10 respondents from Serbia cited 2012 (13%) and 2015 (12%) as possible accession dates. In **Albania and Kosovo**, respondents were looking to the **medium-term**: approximately one in five or more expected the country to join the EU between 2016 and 2020 and one in 10 thought this would only happen later than 2020.

Respondents from **Bosnia and Herzegovina were the most pessimistic** about their country's accession. Sixteen percent thought that the country would never be accepted in the EU as a member and one in 10 thought that this would only happen in the distant future, after 2020. One in five respondents expected the country to be ready for accession between 2016 and 2020.

Expected accession date



International Community

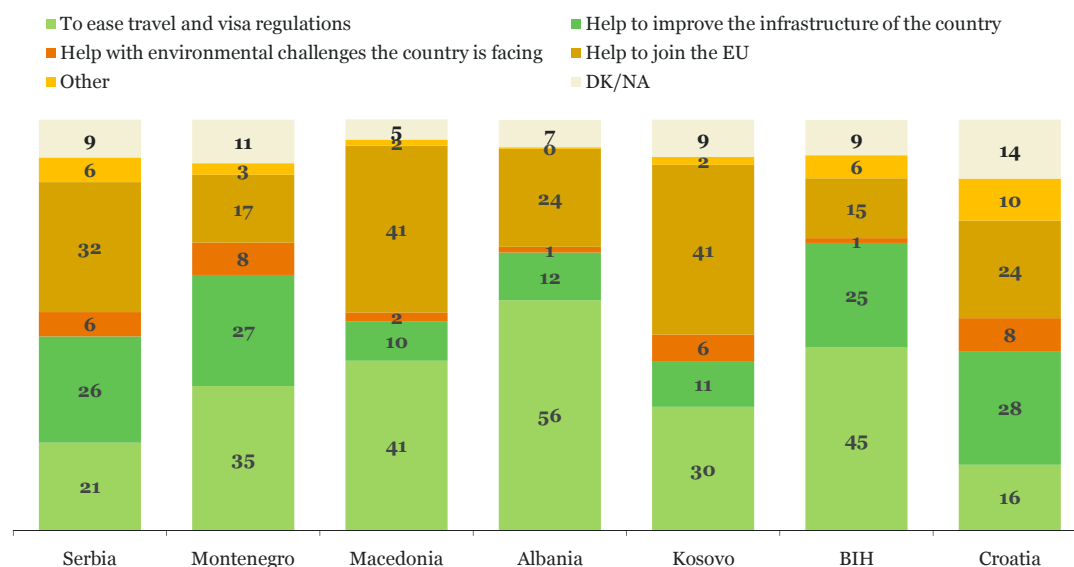
A marked difference of needs and expectations of the people regarding the international community

The expectations toward the international community that were voiced in the Balkan Monitor reflected the diversity of **needs and issues considered to be pressing in countries at different levels of development.**

Among the list of the possible actions presented to the respondents, the ones cited as being the most beneficial were an easing in **travel and visa regulations, help in joining the EU** and an **improvement in the countries' infrastructures.**

However, the priorities placed by the respondents varied significantly between the different countries. The help of the international community on the *ease of travel and visa regulations* was most frequently chosen by the Albanians: more than half of them thought the international community should be active on this point (56%). After the Albanians, the countries showing the most interest were Bosnia and Herzegovina (45%) and Macedonia (41%) with around one-third of respondents from Montenegro (35%) and Kosovo (30%) seeing travel as an area where help from the international community was required.

Most useful assistance from the international community



What would be the single biggest assistance from the international community that could help [COUNTRY]?

Help to join the EU received the most support from the people in Kosovo and Macedonia (both 41%). A relative majority of interviewees in Serbia (32%) and a quarter of respondents in Albania and Croatia also agreed on this type of assistance (both 24%). Help on this point was considered to be of least importance by respondents in Montenegro (17%) and Bosnia and Herzegovina (15%).

Respondents from Croatia (28%), Montenegro (27%), Serbia (26%) and Bosnia and Herzegovina (25%) were the ones who gave the most backing to assistance to improve their *countries' infrastructure*. In Albania (12%), Kosovo (11%) and Macedonia (10%), only approximately one in 10 respondents thought this was the most important area where the international community could help.

Public opinion divided over the role of the ICTY

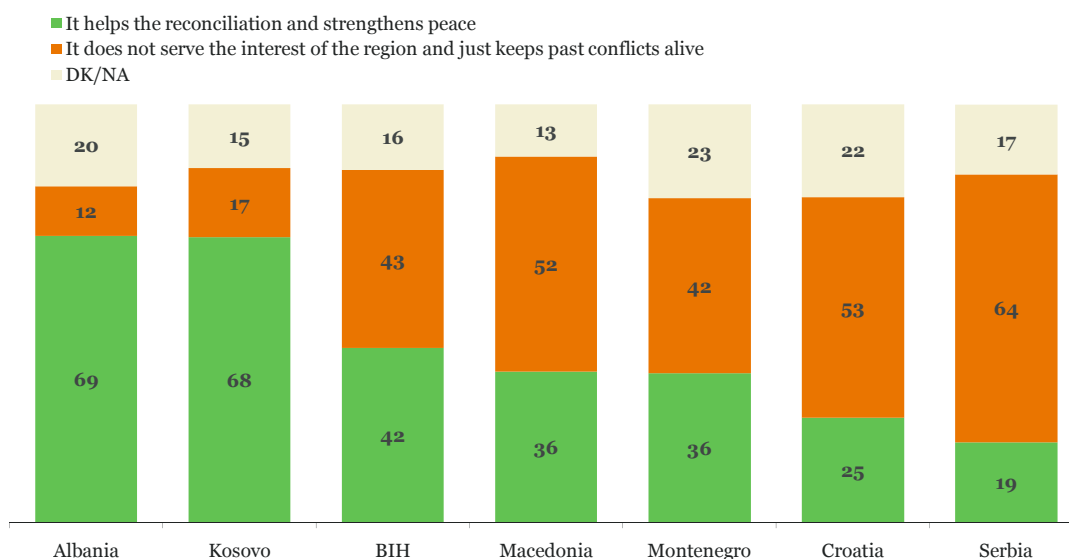
Respondents **were divided** about whether the International Criminal Tribunal for the former Yugoslavia (the ICTY) played a **positive or negative role in the Western Balkans**.

In Bosnia and Herzegovina, opinions were equally split between respondents who thought that the tribunal was helping reconciliation and those who thought that it didn't serve the interest of the region and just kept past conflicts alive (43% negative, 42% positive). In Albania (69%) and Kosovo (68%), the interviewed were most positive about the tribunal: approximately seven out of 10 respondents thought that it was helping reconciliation and strengthening peace while only a small minority of 12% in Albania and 17% in Kosovo disagreed.

In Macedonia (52%), Croatia (53%) and – most importantly – in Serbia (64%), a majority of respondents thought that the ICTY did not serve the interest of the region and just kept past conflicts alive. With more than one third of respondents who thought that the tribunal helped reconciliation and strengthened peace, people from Macedonia were most to have a positive opinion of the tribunal among those countries (36%). In Croatia, only a quarter of the interviewed and in Serbia only every fifth respondent shared that view (19%).

In Montenegro, interviewed with a negative opinion slightly outnumbered those with a positive opinion (42% vs. 36%). Survey participants were across all countries quite numerous not to know how to judge the role of the ICTY or to refuse an answer (between 13% in Macedonia and 23% in Montenegro).

The role of the ICTY



In your views what is the role the ICTY plays in the future of the region?

Attitudes on the ICTY **differed distinctively across ethnic lines within the various regions of the countries concerned**. In Bosnia and Herzegovina, six out of 10 respondents from the Federation thought that the ICTY helped reconciliation and strengthened peace (61%), while only one in 10 respondents from Republika Srpska did so (9%). There, seven out of 10 tended to feel that the tribunal didn't serve the best interests of the region and just kept past conflicts alive (71%).

Three-quarters of Kosovo Albanians had a positive attitude about the tribunal (74%) and therefore completely opposed the opinion of the Kosovo Serbs who saw things negatively (78%). In Montenegro and Macedonia, respondents from the areas with significant Albanian populations were more positive about the tribunal than those interviewed in the remaining parts of the countries. For example, approximately two-thirds of respondents in the parts of Macedonia mainly populated by Albanians were positive about the ICTY (63%) as opposed to one in five of the interviewees in the remaining parts (19%).

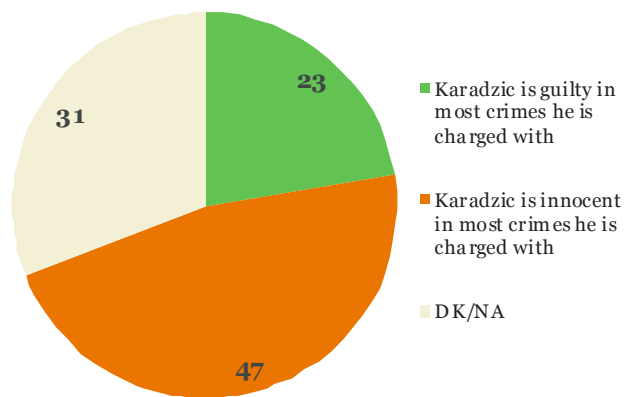
Karadzic: Polarizing Serb public opinion

The polarising effect of the war crimes issue is best illustrated by the positions of Serbs on the recently arrested Radovan Karadzic: the respondents **were strongly divided** with almost a quarter seeing him as guilty, a relative majority of almost half (47%) feeling he was innocent and a near-third being undecided.

Nearly half of the respondents (47%) also saw him as a good Serb, but 45% agreed that his arrest was good for the future of Serbia, and 53% believed that it was good for Serbia's EU integration

process. More people agreed than disagreed with the statement (49% vs. 32%) that his arrest allowed Serbia to concentrate on the future.

Karadzic is guilty or innocent in crimes he is charged with?



*What comes closer to your opinion...
Base: Respondents in Serbia*

A majority of respondents from northern Voivodina thought that Karadzic was guilty (56%), and only one in five thought that he was innocent in most crimes he is charged with (26%). For respondents from the remaining parts of Serbia, however, the picture was reversed. Half of those thought that Karadzic was innocent and only one in five thought that he was rightfully accused of the

crimes. The latter were also more to give a don't know answer or to refuse an answer than the former (30% vs. 23%).

Travel, Visa & Migration

Majority of respondents see better prospects abroad

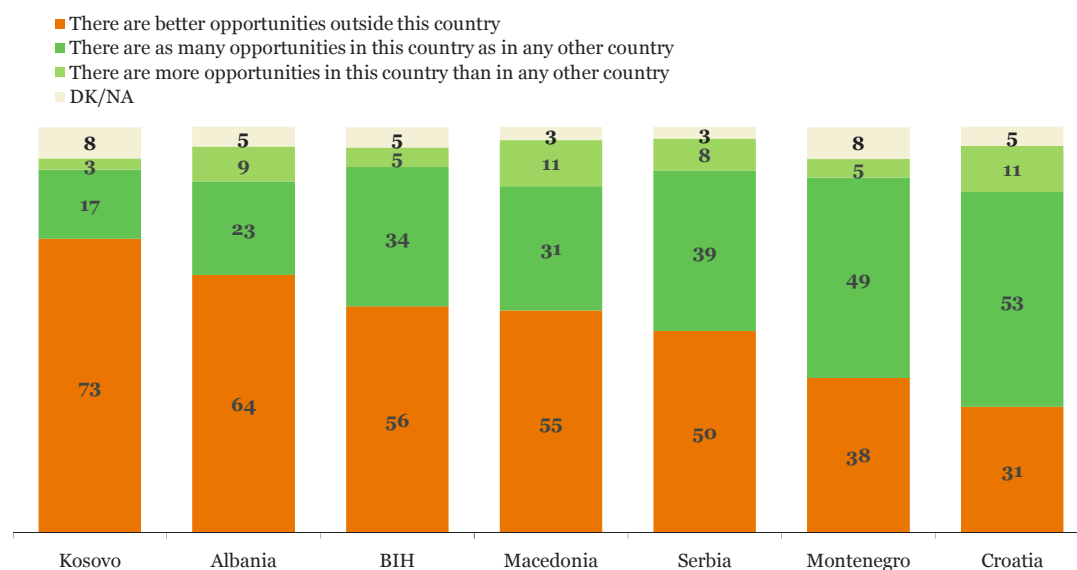
In most of the western Balkan countries, a majority of respondents thought that people had better opportunities outside their own country. Exceptions were Montenegro and Croatia, where approximately every second respondent gave a positive assessment of the existing opportunities in their countries.

In Kosovo, people were particularly envious of the opportunities abroad: more than seven in 10 respondents felt that way and less than one in five (17%) thought that the opportunities were just as good in their own country. In Albania, two-thirds of respondents assessed the opportunities in other countries to be better than those at home and only a quarter disagreed.

The respondents in Croatia (53%) and Montenegro (43%) were most likely to see opportunities in their own countries: almost one in two saw no advantage in going abroad. Only a minority of four out of 10 respondents in Montenegro (38%) and three in 10 interviewees in Croatia (31%) saw more chances beyond the country's borders than within them.

Looking at the Western Balkans in total, approximately one in 10 respondents or less thought that their country would offer people better chances than any other country in the world.

Best opportunities in own country or abroad



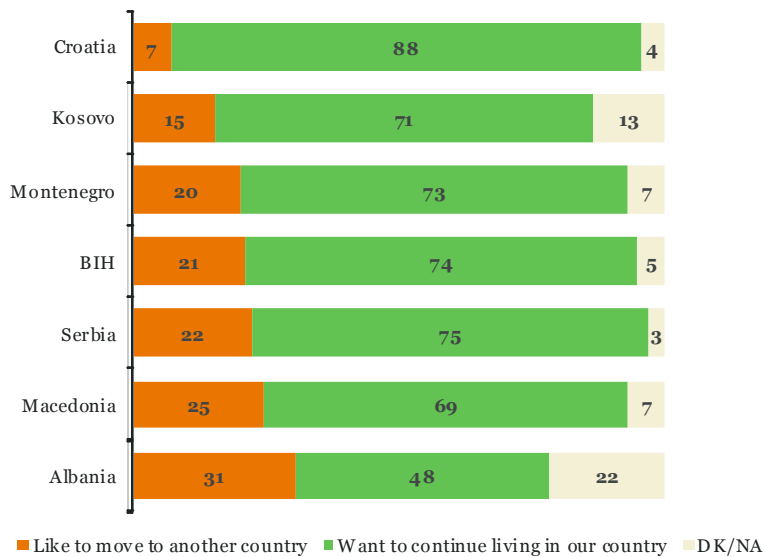
Based on the current conditions in our country, which of the following statements best reflects your opinion? For people like yourself,

A high mobility of people in the Western Balkans – especially in Albania

Even if, in most Balkan countries, a majority of respondents preferred to stay in their home country, the **proportion of respondents wanting to leave was high**.

Indeed, with the exception of Albania, a majority of seven in 10 or more respondents across the Western Balkan countries said they would like to continue living in their own country.

Preference of moving to another country



Ideally, would you like to move (permanently or temporarily) to another country, or would you prefer to continue living in [COUNTRY/ENTITY]?

The desire to stay at home was particularly strong among the respondents from Croatia, where approximately nine in 10 preferred to stay in their country (88%). In Serbia (75%), Bosnia and Herzegovina (74%) and Montenegro (73%), around three-quarters had the same feeling, while only about one in five respondents expressed a wish to move to another country.

In Kosovo and Macedonia, the same share of respondents (approximately seven in 10) rejected moving, whereas more

Macedonian respondents openly expressed a readiness to live in another country compared to those in Kosovo (25% vs. 15%).

However, a significant minority of respondents declared a readiness to leave their home countries.

At 7%, the respondents from Croatia were the least likely to say they would like to move to another country. In Kosovo, 15% were ready to leave and in Montenegro, (20%) Bosnia and Herzegovina (21%) and Serbia (22%), one in five respondents were ready to pack their bags. In Macedonia, this proportion was even higher (25%).

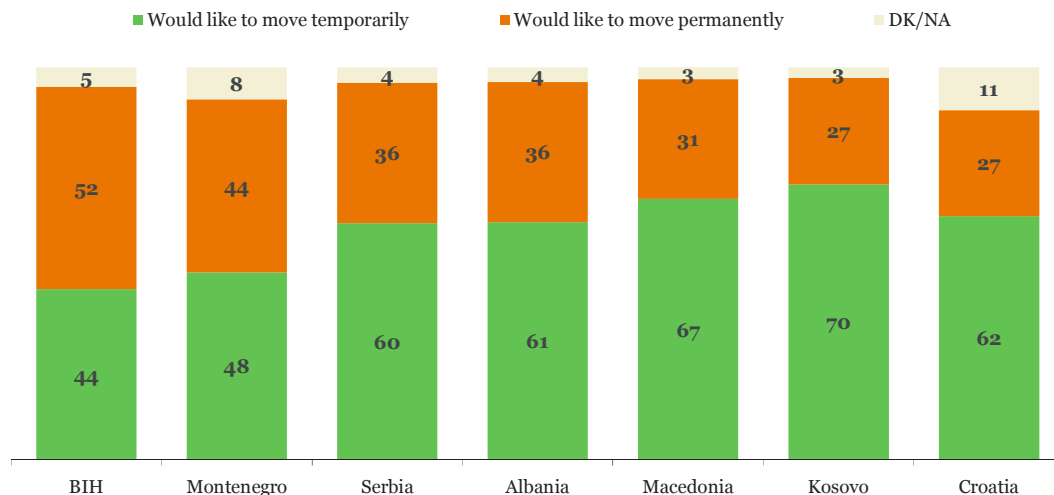
The Albanians proved to be the most willing to go and live abroad. Only half of the respondents preferred to continue living in Albania, while one-third said they were ready to leave the country. However, a significant number of Albanian respondents were undecided and didn't know how to answer or refused to answer to that question (22%).

A return ticket in their pocket

With the exception of the interviewees in Bosnia and Herzegovina and Montenegro, a majority of those respondents who said they would like to move to another country also said they would **prefer to return to their home countries one day**. Among those who had previously declared their willingness to leave, a temporary stay was particularly envisaged by respondents from Kosovo (70%) and Macedonia (67%). Only a quarter (27%) of those respondents in Kosovo and 31% in Macedonia had plans to emigrate definitively.

Respondents in Montenegro and Bosnia and Herzegovina were the most likely to think about emigrating for good. In the latter, a majority of respondents wanted to stay abroad permanently (52%), while only 44% planned to return. In Montenegro, approximately one in two respondents had definite emigration on their minds, and 44% wanted to return to their home countries at some time in the future.

Preferred length of stay



You mentioned, that you would like to move to different country, would you move only temporarily (for a couple of years at most), or you would like to spend your life in another country?

Serbs who remained in Kosovo were not ready to leave: indeed, eight out of ten of Kosovo Serbs expressed their wish that they wanted to stay in Kosovo. With that number, they were more likely to intend to stay than their Albanian counterparts (69%). Only about half of those Kosovo Serbs who are saying that they would like to leave were considering moving for good (44%) - that is about every 10th of the Serbs who live in Kosovo today.

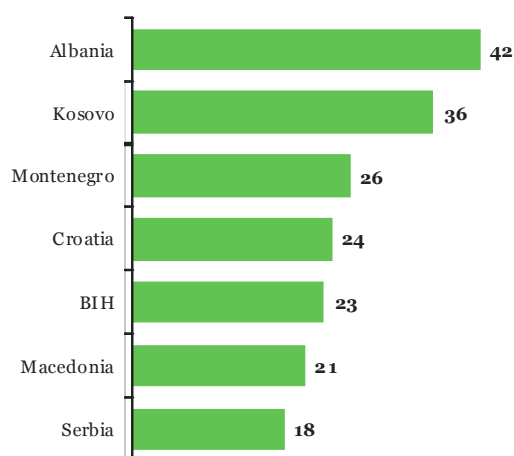
In Macedonia and Montenegro, respondents from the regions with an important Albanian minority population were less likely to consider a permanent move. In Montenegro for example, while the intention to leave the country was about the same (20%), only one in five of those respondents from the Albanian minority did consider a permanent move, while respondents from other parts of Montenegro were twice as likely want to leave for good (41%).

In Bosnia and Herzegovina, it was the respondents living in the Federation (57%) who were more likely to envisage a permanent emigration than those in Republika Srpska (39%).

Albanians and people in Kosovo have most often a family member abroad

Across most Western Balkan countries, between one-fifth (Serbia: 18%) and a quarter of respondents (Montenegro: 26%) said they have a family member working or studying abroad.

Family member working/studying abroad



Has anyone from your family gone to work or study temporarily in another country?
% yes

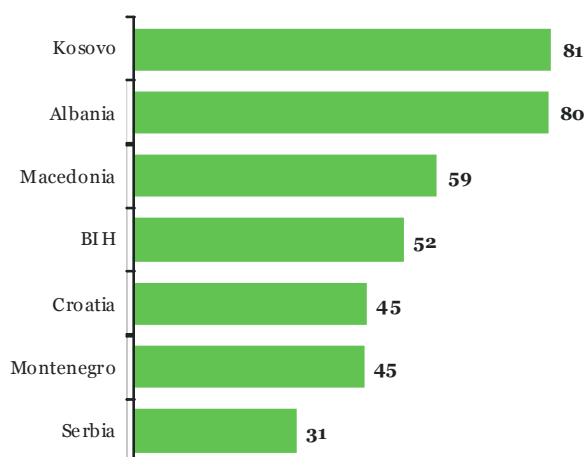
With distinctively more respondents who said that one of their family members had left the country for work or study (42%), Albanians had the most extended family network abroad. There were also one in three Kosovar respondents who had a family member abroad (36%).

As expected, respondents from ethnic minority groups more frequently reported a family member living abroad. In Macedonia, for example, three in ten respondents from the regions with an important minority population said they had a family member abroad, while only one in six (17%) from the remaining parts said the same.

Economic emigration and financial remittances most common in Kosovo and Albania

The results indicated that economic conditions were one of the main reasons for people in Albania and Kosovo to work outside of their borders. Indeed, out of the respondents in those two countries who said they had a family member living abroad, eight out of 10 said that this person was providing financial assistance. In Macedonia and BIH, although a majority

Help from family member working/studying abroad



Do the members of your family who work / study in other countries directly or indirectly help your family financially?
%yes

said they received financial help from family member(s) abroad, they were not so likely to say this was the case (59% and 52%, respectively). In Serbia, such financial help was more uncommon (31%).

A large majority of Kosovo Albanians said, that they received financial help from their relatives abroad (81%), while only a slight majority of Kosovo Serbs did so (53%). In Macedonia and Montenegro, respondents from areas mainly populated by Albanians were more likely to agree that they were helped out financially by relatives abroad than the respondents from the remaining parts of the country: for example, three-quarters of respondents from the Albanian minority in Macedonia said they received financial help (73%), whereas only half of those from the rest of the country did so (48%).

Neighbourly relations

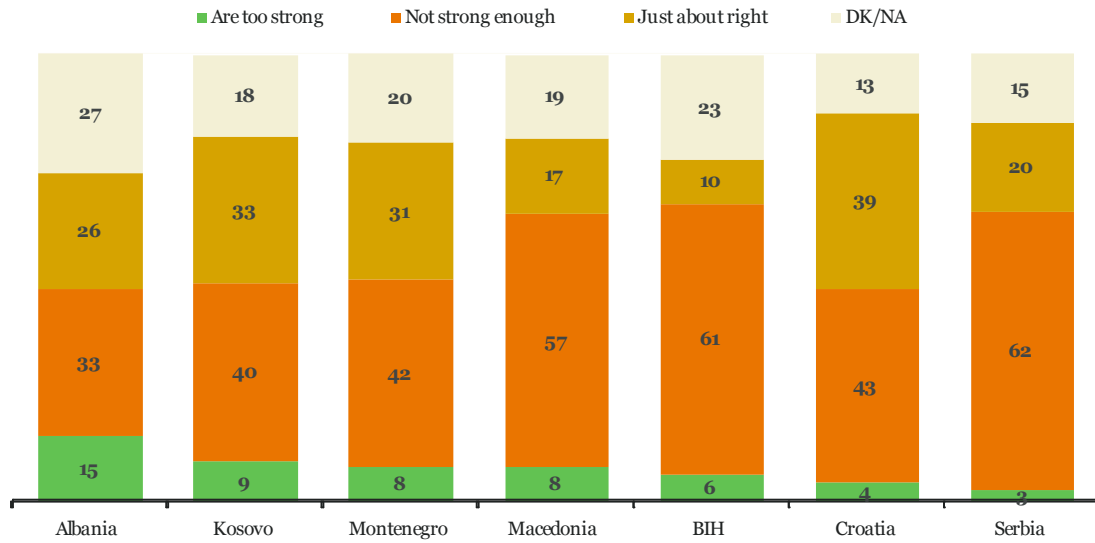
A call for stronger ties between the neighbouring countries

Opinions on the strength of their countries' ties to their neighbours were divided. However, there was a **tendency among respondents to consider that the relations between the individual countries were not strong enough**. Across the Western Balkans, an absolute or relative majority of respondents shared that opinion. The loudest call for tighter relations between the neighbouring countries came from Serbia (62%), Bosnia and Herzegovina (61%) and Macedonia (57%). Only around one in five respondents in Macedonia (17%) and Serbia and one in 10 in BIH said that the ties were just about right. Hardly any respondent in those countries considered the ties to the neighbouring states to be too strong.

In Croatia, Montenegro and Kosovo, four in 10 or more respondents thought that the relations to neighbouring countries were not strong enough, whereas about a third of the interviewed in Montenegro and Kosovo (31%) considered them to be just about right and only a small minority of approximately one in 10 respondents felt they were too strong. Croatia had the largest share of respondents considering the country's relations to be just about right (39%). Barely any respondents thought they were too strong (4%).

Albanians were split in their opinions about their country's relations with their neighbours. While most Albanians considered their country's ties to their neighbours were not strong enough (33%) and a quarter thought they were just about right (26%), the view that their country's ties to its neighbours **were too tight** was most widespread in Albania out of all the Western Balkan countries (15%).

Country's ties to its neighbours in the region



Would you say your country's ties to its neighbours in the region?

In Macedonia, Montenegro and Serbia, respondents from the regions where minorities live were less likely to complain that their countries' ties to their neighbours in the region were not strong enough. In Macedonia, for example, only slightly more than four in 10 respondents from the Albanian minority (42%) thought that the ties were too weak, whereas two-thirds of respondents from the remaining parts of the country did (65%).

In Bosnia and Herzegovina, nearly two-thirds of respondents in the Federation felt that the neighbourly ties were too weak (63%), a view shared by fewer respondents in Republika Srpska (54%).

Kosovo's independence and the region's future

Regardless of Belgrade's strong opposition and its categorical refusal to recognise the new state, Yugoslavia's disintegration was completed earlier this year when Kosovo declared its independence. Despite the warnings about the possible impact on the region's stability that preceded the unilateral declaration of independence and with a few exceptions of violent protest in the weeks following the event, the Balkans have not been profoundly shaken by the creation of this new state.

However, the various countries' views on the issue do vary, with an overwhelming majority of respondents from Kosovo and Albania saying independence has had a positive impact on the region, but only a minority of Serb and Montenegrin participants in the survey sharing this position.

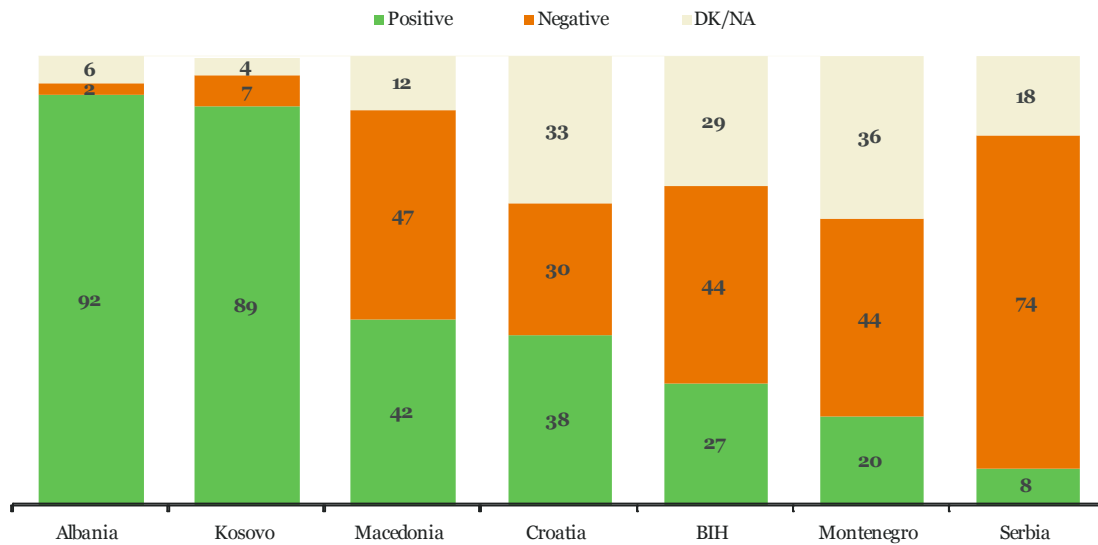
Kosovo's independence: a distinct division about the outcome

The results of the Balkan Monitor mirrored the **polarisation in people's attitudes on Kosovo's declaration of independence** between respondents from Kosovo and Albania on the one hand and from Serbia on the other hand:

While a huge proportion of respondents in Albania and Kosovo were convinced of the positive impact of an independent Kosovo on the stability of the region (92% and 89%, respectively), respondents in Serbia obviously took an opposite view (74% negative). Few people were opposed to the majority views: in Albania in particular, barely any respondent thought that an independent Kosovo could have a negative impact (2%, 7% in Kosovo). In Serbia, only a few people (8%) felt that Kosovo's Independence was positive for the stability of the Balkans.

When looking at the results in Kosovo at a regional level, we saw a **clear divide between the Kosovo Serbs and Kosovo Albanians on the topic of the Serb province's independence**: the latter were nearly undivided in their agreement about the positive impact of the event (95%), whereas only a handful of respondents there thought there would be a negative effect (2%). However, **not a single Kosovo Serb thought that Kosovo's independence would be positive for the region**. Eight in 10 of the interviewees expected a negative impact, while 15% did not know and 4% refused to answer that question.

Independent Kosovo's impact on the stability of the region



Will Kosovo's independence have positive or negative consequences on the stability of the region?

It was no surprise that Kosovo's declaration of independence was a topic **where almost everyone in Kosovo and Albania had an opinion**. In other countries, however, the proportion of respondents who preferred not to give an answer or did not have one was strikingly high. The issue seemed to be particularly sensitive in Montenegro with its important share of citizens with a Serbian identity: there, more than one-third of respondents did not answer to that question (36%).

Apart from the significant numbers who were uncertain about the impact of Kosovo's independence, opinions were split across the remaining Balkan countries. However, respondents who considered independence to be negative outnumbered those with a positive attitude on the issue. This was most strikingly shown in Montenegro, where more than one in four respondents were convinced about the negative impact of Kosovo's independence (44%) and only one in five thought it would be positive for the region.

Bosnia and Herzegovina had a similar number of respondents as Montenegro who saw a negative outcome (44%), while more saw the event in a positive light (27%). However, opinions were divided between the Republika Srpska and the Federation: in the former, nine in 10 interviewees who gave their opinion thought that Kosovo's independence was bad for the region's stability (90%), whereas in the Federation, six out of 10 of those respondents who voiced their opinion were positive about Kosovo's independence (59%).

The wider effect of Kosovo's independence on Bosnia was also seen by the fact that 43% of the respondents in Republika Srpska agreed that Kosovo's independence set precedence for Bosnia's future and cleared the way for the secession of Republika Srpska; only 29% disagreed. In the Federation, six out of ten respondents disagreed on that point (57%), whereas 23% agreed.

With approximately one in four respondents being appreciative about Kosovo's Independence, the respondents from **Croatia** (38%) were mostly positive about the issue. About one-third of the Croats thought that Kosovo's independence was bad for the stability of the region (30%).

Opinions on the consequences of Kosovo’s independence were most divided in **Macedonia**. Here, nearly nine out of 10 respondents from the areas with a majoritarian Albanian population thought that Kosovo’s independence had a positive impact on the stability of the region (87%) and only a small minority of the interviewees from the rest of Macedonia thought that Kosovo’s independence would have a positive outcome (17%).

Most Serbs think their country will never recognize an independent Kosovo

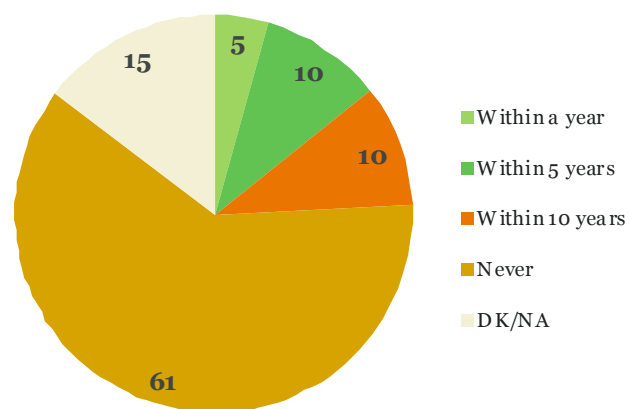
Respondents in Serbia were asked when they thought that their country’s government was going to recognise Kosovo’s declaration of independence.

A majority of six out of 10 respondents thought that this would never happen.

Only a handful expected immediate recognition (5%), while one in five felt it would be within the next five to 10 years. One in seven Serbs (15%) did not know when their government would accept the independence of Kosovo.

Respondents were 15% not to know or to refuse an answer when asked when their countries government would accept the independence of Kosovo.

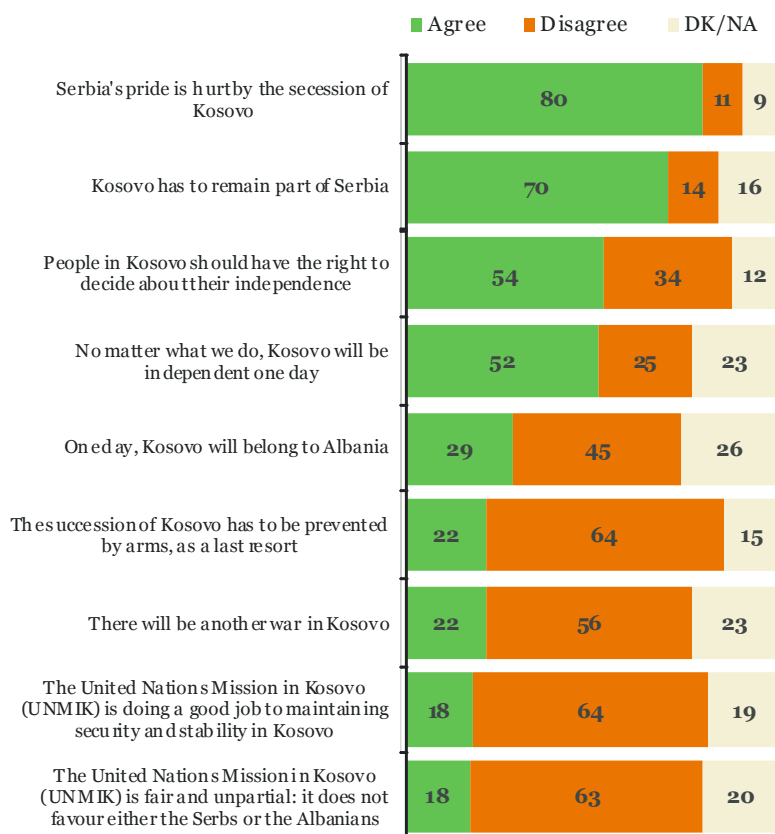
When will Serbia recognize Kosovo’s independence?



*When do you think Serbia will recognize Kosovo's independence?
Base: Respondents from Serbia*

Eight in 10 respondents in Serbia felt that the country’s pride was hurt by the secession of Kosovo and seven out of 10 felt that Kosovo must remain part of Serbia. However, nearly two-thirds of respondents opposed the idea that, as a last resort, the breakaway had to be prevented by arms (64%) – an idea that only one in five Serbs supported (22%). However, slightly more than half of respondents were of the opinion that people in Kosovo should have the right to decide about their independence (54%) and that Kosovo would be independent anyway, regardless of any actions that Serbia might take.

Serb people's views regarding Kosovo



*I will read out some statements: please tell me if you rather agree or rather disagree with each of them.
Base: respondents from Serbia*

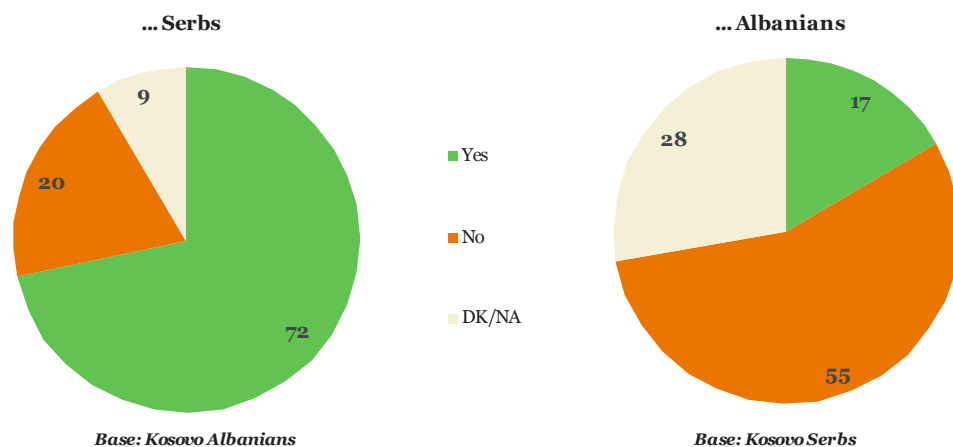
Only one-third of respondents in Serbia thought that Kosovo would belong to Albania one day (29%), whereas nearly half of the interviewees couldn't even imagine that scenario (45%).

Ideas on how Serbia should deal with Kosovo in the future **differed widely within Serbia's different regions**. For example, while only slightly more than half of the respondents in the northern part of Voivodina held the opinion that Kosovo needed to remain part of Serbia (53%), seven in 10 people in the rest of Serbia did so (70%).

Kosovo Serbs see no co-existence with Kosovo Albanians

Approximately seven in 10 Kosovo Albanians thought that living together in peace with Kosovo Serbs was possible (vs. one in five who did not agree). The majority of Serbs, however, did not agree that living together peacefully with Kosovo Albanians was possible. Less than one in five of the

Possibility to live together peacefully with the ...



*Do you think it will be possible to live together peacefully with the Serbs in an independent Kosovo?
Do you think it would be possible to live together peacefully with the Albanians in an independent Kosovo?*

interviewed Kosovo Serbs agreed that peaceful co-existence was possible (17%). Kosovo Serbs were more likely to say they “did not know” or to refuse an answer (28% vs. 9% of Kosovo Albanians).

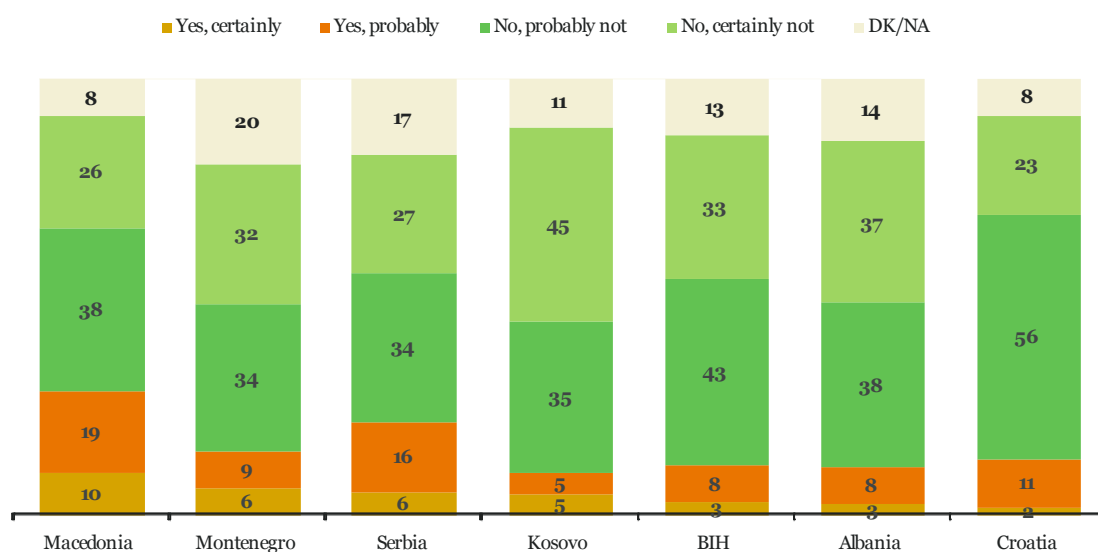
Macedonians and Serbs are not convinced that the danger of war is over

Around one in four Serbs and Macedonians (22% and 29% respectively) felt there could be another war in the region. In Macedonia, one in 10 respondents even thought that there *certainly* would be an armed conflict in the next five years somewhere in the Balkans. However, despite those views, a large majority of respondents across all Western Balkan countries thought that in the next five years there would be no armed conflict in the region.

Respondents from Kosovo were particularly optimistic that the Balkans’ near-term future would be peaceful. Eight out of 10 respondents thought that there would be no future regional war and nearly half even thought that there was *certainly* no danger of an armed conflict in the next five years (45%). Only one in 10 respondents anticipated future armed conflicts. More than three-quarters of the respondents in Albania (75%), Bosnia and Herzegovina (76%) and Croatia (79%) were optimistic about the stability of the region and only slightly more than one in 10 foresaw armed conflicts in the near-term future.

In Montenegro and Serbia, approximately one in five respondents didn’t know whether there was a risk of war during the next five years. In the remaining countries of the Western Balkans, approximately one in 10 interviewees chose to say they “did not know” or refused to answer.

Chance of an armed conflict in the Balkans



Looking at the next five years, do you think there is a chance that there will be an armed conflict somewhere in the Balkans?

In Serbia, more than one in five Serbs expected a future war (22%), while barely any respondents from the regions with significant minority populations did so (4%). More of the latter felt there would *certainly* not be a war in the next five years, compared to the former (34% vs. 26%).

Kosovo Serbs were more pessimistic than Kosovo Albanians about the peace prospects in the region. Indeed, one in five Kosovo Serbs thought that an outbreak of another war would be possible in the next five years (21%), while only one in 10 Kosovo Albanians felt that way. Half of the latter thought that there would *certainly* not be a war in the region (49%), while only a handful of Kosovo Serbs were convinced about that (5%). Additionally, Kosovo Serbs were marked by a high uncertainty about the issue: six in ten respondents said they wouldn't know about the future or refused to answer.

Similar differences were observed in Bosnia and Herzegovina, with respondents in the Republika Srpska being more pessimistic than those in the Federation. One in five respondents in the former thought that there would be a future war (21%) while only one in 10 respondents in the Federation did so (9%). In fact, four in 10 interviewees in the Federation thought there would *certainly* not be a war in the next five years; twice as many as the people felt that way in the Republika Srpska (18%).

In Macedonia, only 17% of respondents from the areas mainly populated by Albanians believed in the possibility of an armed conflict in the next five years, while in the rest of the country more than one-third of respondents held that view (36%). This latter figure was one of the highest in the Western Balkans in regard to the possible outbreak of an armed conflict.

Conclusion

The Western Balkans is a multi-faceted region situated between growth and gloom, between crises and creativity. The *Gallup Balkan Monitor* reflects this diversity in presenting a mixed picture of today's Western Balkans. Although most of the respondents were generally satisfied with their lives, they also expressed a concern that their countries were not developing as they should or could be. This resulted in many respondents saying that the best opportunities could still be found abroad.

There seems to be a clear polarisation between the region's newest countries – Kosovo and Montenegro, who are highly optimistic about the future, and the remaining states – that are much less positive. However, it will be interesting to see how long this 'honeymoon' period lasts and how it will develop in the coming years. In Kosovo's case, in particular, many analysts have been warning about the fragile economy of the new state. Additionally, Serbia's categorical refusal to recognise its former province's independence – reflected by the results of the *Balkan Monitor* – is likely to hinder certain aspects of Kosovo's future development.

The survey also underlines the need for the regions' politicians to deliver better results to their constituents in many aspects of life. For example, although corruption and organised crime are recognised as being major obstacles to the region's development, there is a general feeling of unease about the governments' actions. Nevertheless, more than a decade after the end of the Balkan wars, the region seems to have regained a certain level of stability, with only a minority of respondents believing a new armed conflict could take place in the coming years. However, around one in four Serbs and Macedonians (22% and 29% respectively) felt there could be another conflict. At the same time, in most countries, with the exception of Albania and Kosovo, interviewees have remained sceptical about the role of Kosovo's independence in bringing peace and reconciliation to the region.

Today, the countries of the Western Balkans are clearly heading towards an eventual full EU membership and support for this process remains high. In this respect, the region's citizens have adopted a rather realistic approach to EU accession, with only a minority of respondents in all countries imagining that their nation would become a full EU member within the next few years. The opinions about the reception that the countries of the Western Balkans are likely to receive are mixed, with respondents feeling that the European Commission would offer a warmer welcome than the EU citizens themselves.

The *Balkan Monitor's* objective has been to cover as wide a range of questions as possible in order to show a realistic and much needed picture of the Western Balkans ... as seen from the inside. Nevertheless, this report is but a snapshot of the total survey: the accompanying website (see <http://www.balkan-monitor.eu>) will contain a comprehensive range of tools that allow further examination of the data. In such an extremely dynamic region, many changes are likely to occur in the years to come. These will be in the political, social and economic landscapes of the countries concerned, as well as in the public opinions existing on the ground. They will all be well worth following as we approach the next *Gallup Balkan Monitor* survey in 2009.

Technical Report

Methodology

Face-to-face interviews at respondents' home.

Sampling information

Target population

Citizens aged 15 years and older from Albania, Bosnia and Herzegovina, Croatia , Kosovo, Macedonia, Montenegro, Serbia

Sampling Frame:

The Sampling frame is based on the last available national census and migrations data, as well as local institutions' estimates of population and households for 2007.

Sample type:

Stratified 3-staged probability sample, with around 100 primary Sampling Units randomly selected proportional to the population with boosted subsamples to better represent certain regions – with post-stratification weighting to reflect true population proportions.

- 1: Polling station territory – approximately size of 200 HH (PPS with probabilities proportional to size)
- 2: Households by random route technique starting from the given addresses (SRSWoR)
3. Households member with same probability (SRSWoR) – Kish scheme

Sample size:

1. Albania	1,000
2. Bosnia	1,000
3. Croatia	1,000
4. Kosovo	1,000
5. Macedonia	1,000
6. Montenegro	1 000
7. Serbia	1 000
TOTAL	7 000

- 10 Respondents per sampling point
- Stratification according to type of settlement (urban/rural), geo-economical regions
- Allocation of the sample by stratum is proportional to size of the stratum (number of persons aged 15+).
- Post stratification regarding: gender, age, type of settlement, geo-economical regions
- Quality control back-checks (in person, by telephone or by post) carried out and documented in a pre-specified form on at least 5% of respondents, 10% of refusals and 10% of non-contacts. Quality control back-checks of respondents involved a short interview with the respondent (by telephone or in person).

Fieldwork dates

4th of September to 30th of October 2008.

GALLUP®

Balkan Monitor

Insights and Perceptions: Voices of the Balkans

in partnership with the

European Fund for the Balkans