

Western Balkans SecuriMeter 2023

**BALKAN BAROMETER PUBLIC
OPINION SURVEY ON**

**“Attitudes towards security:
Perceptions of security and threats
in the Western Balkans”**

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Abbreviations

CEE	Central and East European
COVID-19	Coronavirus Disease
CMS	Corruption Monitoring System
CPI	Corruption Perceptions Index
EnC	Energy Community
EU	European Union
FRONTEX	European Border and Coast Guard Agency
GDP	Gross Domestic Product
IOM	International Organisation for Migration
IPCC	Intergovernmental Panel on Climate Change
KFOR	Kosovo Force
MARRI	Migration, Asylum and Refugees Regional Initiative
NATO	North Atlantic Treaty Organisation
NGO	Non-governmental Organisation
OECD	Organisation for Economic Co-operation and Development
OSCE	Organisation for Security and Co-operation in Europe
RCC	Regional Cooperation Council
RYCO	Regional Youth Cooperation Organisation
SALW	Small Arms and Light Weapons
TCT	Transport Community Treaty
WB	Western Balkans
WBF	Western Balkans Fund

Foreword

The Regional Cooperation Council (RCC), with the invaluable support of the Italian Ministry of Foreign Affairs and International Cooperation, is proud to unveil the third edition of the **SecuriMeter** report, our annual Public Opinion Survey on Security Perceptions in the Western Balkans. As the region's security landscape continues to evolve under the influence of regional dynamics and global events, this edition is a testament to our uncompromising commitment to understanding these shifts.

Conducted between 14 May and 2 June 2023, across the Western Balkan economies, the survey engaged 6,023 respondents. It delves into a plethora of themes, ranging from general security perceptions (Chapter A), fight against terrorism, organised crime, and border security (Chapter B), to more nuanced topics like the sentiments surrounding gun ownership (Chapter C), irregular immigration and asylum-seeking (Chapter D), emigration intentions influenced by the quality of life and the prevailing political situation (Chapter E). Furthermore, it addresses disaster prevention and preparedness (Chapter F), challenges posed by disinformation and cyber threats (Chapter G), pervasive issue of corruption (Chapter H), and ongoing aggression by Russia against Ukraine (Chapter I). The repercussions of the latter have cast a long shadow over our region, manifesting in cyber-attacks, disinformation campaigns, and "weaponisation of energy", all of which have tangible impacts on economic development and well-being of Western Balkans citizens.

Since the inaugural edition in 2021, our journey with the **SecuriMeter** has been measuring public sentiment on various security-related challenges in the Western Balkans. Each edition, including this one, builds on the previous, introducing new themes that mirror the changing global scenario and highlighting external and internal factors shaping our security landscape.

However, gathering this data is just one part of the equation. It is equally crucial to decode these findings into actionable strategies and policies. Ensuring that the invaluable insights from the **SecuriMeter** reach the desks of policymakers, resonate with practitioners, and inform the public is paramount.

Our vision for the future includes expanding the scope of **SecuriMeter**, integrating questions related to the EU integration process and possibly broadening the survey to the SEE level.

Introduction

The Regional Cooperation Council (RCC) presents its third edition of the Public Opinion Survey on Security in the Western Balkans region. Since 2021, RCC has been engaged in measuring attitudes, experiences, and perceptions of the public concerning the security situation in their economies and communities. The purpose of the survey is to provide a better understanding of citizens' perceptions of the main security challenges and assist practitioners and governments to undertake informed decisions and evidence-based policies to respond to emerging challenges. While different economies may face specific security threats, unique to them, many challenges to security are interconnected.

Peace and the prospect of peace continues to be disrupted and shattered by Russia's continued aggression against Ukraine. Its repercussions are felt across the globe and significantly in the Western Balkan economies, spilling over in a form of cyber-attacks, disinformation campaigns, weaponisation of energy, all with detrimental effects on economic development and constituents' wellbeing.¹

The data presented here are the result of a field survey administered between 14 May and 2 June 2023 in Albania, Bosnia and Herzegovina, Kosovo^{*2}, Montenegro, North Macedonia, and Serbia with a total of 6,023 respondents. The questionnaire for this edition contained 59 questions (12 more than the previous two editions) and an additional chapter on perceptions around the war in Ukraine.

The report contains the following themes/chapters:

- A.** General security perception
- B.** Perceptions of the fight against terrorism, organised crime, and border/boundary security
- C.** Perceptions of gun ownership and fighting illicit possession, trafficking and misuse of SALW
- D.** Perceptions of irregular immigration, asylum-seeking and humanitarian dimension of migratory movements that can help measure sentiments of people but also the responsiveness of institutions
- E.** Emigration intentions and perceptions of quality of life, including security and political situation
- F.** Perceptions on disaster prevention and disaster preparedness
- G.** Perceptions of the impact of disinformation, cyber threats and vulnerability, as the main segments of hybrid threat
- H.** Perceptions on corruption
- I.** War in Ukraine

1 EU. 2023. Future shocks 2023.

Online: [https://www.europarl.europa.eu/RegData/etudes/STUD/2023/751428/EPRS_STU\(2023\)751428_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/STUD/2023/751428/EPRS_STU(2023)751428_EN.pdf)

2 This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence.

Regional Overview

Increased threats and vulnerabilities in the online space – cyberattacks, disinformation and foreign malign influence

With illiberalism on the rise³ and the online infosphere⁴ spreading in all corners of the world, new challenges are emerging both to security and democracies around the world. According to the EU's 2023 Future Shocks publication, democratic infosphere⁵ is being eroded by malign foreign and domestic forces with an anti-democratic and geostrategic agenda.⁶ Anti-democratic narratives aimed at eroding trust in democracy have gained traction in recent year, and their impact goes beyond the individual level to the collective, institutional, and international one, affecting decision-making. "The ongoing battle of narratives between Western-style democracies and anti-democratic authoritarian states has been fuelled by the pandemic⁷ and further exacerbated by Russia's war of aggression against Ukraine. At the same time, and partly linked to this, in recent years domestic audiences have embraced conspiracy theories that are being pushed by a variety of actors, increasingly blurring the lines between foreign and domestic actors. Economies in the region have not been immune to these trends, especially since Russia's intensified efforts to justify its unprovoked aggression.

These trends and threats identified at the European Union (EU) level are also very much present in the Western Balkan economies. Media monitoring from the second half of 2022 shows that the most frequent theme for disinformation in the region was related to Russia's aggression, presenting a negative picture of Ukraine as a neo-Nazi and war profiteer that sells military aid that other economies donate. A second trend in this area is related to disinformation narratives inspired by the recent cyber-attacks throughout the region, showing that the Western Balkans (WB) economies are not competent to deal with cyberattacks. Furthermore, the monitoring found that nearly half the articles found in the media had the potential to incite violence, highlighting the intent of various trends and narratives to disrupt democratic processes and sow conflict in the region.⁸

On one hand, disinformation and propaganda are visible as external threats to the functioning of democracy and good governance. On the other hand, they are also not limited to foreign players, but also domestic political entities, individuals and organisations willing to participate in creation and dissemination of disinformation and false narratives for their own political goals, negatively impacting social cohesion and democratic governance.⁹ These threats to security and governance are relatively new and on the rise. It is important to pay attention, understand the root causes and tackle the consequences. As the key findings will show, citizens in the region are aware of the dangers in the online sphere, but many also admit that they would not be able to independently

3 Dryanovska T., 2017. Illiberalism in the Western Balkans? A publication of European Union Institute for Security Studies (EUISS). Online: [Alert 17 WB.pdf \(europa.eu\)](#)

4 Colomina C., Sanches M. YOUNG R. 2021. The impact of disinformation on democratic processes and human rights in the world. A study of the European Parliament. Online: [The impact of disinformation on democratic processes and human rights in the world \(europa.eu\)](#)

5 Understood as the online public space for democratic debate.

6 European Union, 2023. Future shocks 2023.

Online: [https://www.europarl.europa.eu/RegData/etudes/STUD/2023/751428/EPRS_STU\(2023\)751428_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/STUD/2023/751428/EPRS_STU(2023)751428_EN.pdf)

7 ibid

8 Metamorphosis Foundation for Internet and Society. 2023. Disinformation trends and narratives in the Western Balkans: Media monitoring report for the period July-December 2022. Online: https://metamorphosis.org.mk/wp-content/uploads/2023/03/disinformation_trends_and_narratives_in_the_western_balkans_media_monitoring_report_jul-dec-2022-1.pdf

9 Metamorphosis Foundation for Internet and Society. 2023. Geopolitical Perspective of Disinformation Flows in The Western Balkans. Online: https://metamorphosis.org.mk/en/izdanija_arhiva/geopolitical-perspective-of-disinformation-flows-in-the-western-balkans/

identify fake news and malign influences, emphasising the need for robust and fact-checking journalism in the region.

Organised crime as a key security risk

Organised crime remains an important security challenge to the Western Balkans. Given its strategic location bridging the East and West, it has the potential to evolve as a significant nexus in the global illicit trade.¹⁰

Robust criminal networks continue operating in and beyond the region, establishing connections with counterparts in Latin America and Western Europe¹¹, and playing important roles in the global trade of illicit goods and smuggling people to and within the European Union.

These criminal networks have proven to be very adept at exploiting the COVID-19 pandemic, and there is a risk that they will take advantage of the Russian invasion of Ukraine, including the availability of large stockpiles of weapons in Ukraine¹². The illegal trade in firearms, explosives, and money laundering often facilitates their primary activities.

The perception of organised crime as a significant security concern remains consistent amongst the region's population. This year's survey, consistent with previous surveys, indicates that approximately 60% of respondents ranked organised crime as their top security concern.

Corruption remains widespread across the region

One of the main concerns that is felt uniformly in economies of the Western Balkans is corruption, in all its forms. Citizens in the region continue to see corruption as a societal malaise, so widespread that they themselves engage with it in order to receive basic services.

The 2022 Transparency International Corruption Perception Index paints a generally grim picture for the region as economies continue to struggle to control corruption. According to the report, Serbia and Bosnia and Herzegovina hit historic lows amidst issues with the rule of law. Kosovo* made some progress through improving the legal framework, but implementation remains to be seen. In North Macedonia accountability and the genuine fight against corruption is important, thus the need to properly resource and allow independence of institutions responsible for investigating corruption. Bosnia and Herzegovina scored the lowest in the region and saw a significant decline in the CPI, having lost 8 points since 2013.¹³ Corruption scores amongst the lowest in the yearly Nations in Transit Report by Freedom House, despite some progress and efforts in different economies.

Migration flows – increased numbers, shorter stays

According to data from 2022, there was a record number of migrants passing through WB borders/boundaries, but their stay duration has moved in the opposite direction as many spent fewer days in each economy before

10 Cooperation in the fight against organised crime in the Western Balkans, page 1, December 2021, EPRS | European Parliamentary Research Service.

[https://www.europarl.europa.eu/RegData/etudes/ATAG/2021/698838/EPRS_ATA\(2021\)698838_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/ATAG/2021/698838/EPRS_ATA(2021)698838_EN.pdf)

11 Belgrade Centre for Security Policy. 2022. Little Black Book of Organized Crime Groups in the Western Balkans.

Online: <http://radar.bezbednost.org/wp-content/uploads/2022/10/Little-black-book-1.pdf>

12 European Commission Communication on EU Enlargement Policy, 12 October 2022,

<https://neighbourhood-enlargement.ec.europa.eu/system/files/2022-10/2022%20Communication%20on%20EU%20Enlargement%20Policy-v3.pdf>

13 Transparency International. Corruption Perception Index 2022. Online: <https://www.transparency.org/en/news/cpi-2022-eastern-europe-central-asia-growing-security-risks-authoritarianism-threaten-progress-corruption>

attempting to reach their destination. In Bosnia and Herzegovina, for example, migrants spent on average 58 days in transit reception centres in December 2021 compared to 8 days in December 2022.¹⁴ In 2022, authorities registered 192,266 migrants in the Western Balkans - a 59.5% increase in arrivals compared to 2021 and a 348 % increase when compared to 2018.¹⁵ Serbia, by far the main hub, and Bosnia and Herzegovina remain the economies with the largest influx of migrants. Albania and Kosovo* saw a decrease by comparison.

The surge of irregular migrants in recent years has made the WB one of the main crossing points for migrants coming from war zones and other areas, looking to reach EU member states. This has prompted measures by the EU to increase border/boundary management and cooperation, through conclusion of agreements on Frontex's operational activities the first of which was signed with Albania, followed by Montenegro and Serbia. New agreements to broaden the Frontex's mandate are being negotiated since late 2022, which would allow support to the economies of the WB to manage migratory flows, counter illegal immigration and tackle cross-border/boundary crime.¹⁶ Additionally, an Action Plan for the Western Balkans was adopted by the European Commission in December 2022 to address the challenges faced by the region in managing the flow of irregular migrants, especially focusing on countering smuggling, improving reception capacity and swift asylum procedures, and enhancing readmission cooperation and return.

Climate change and natural disasters are increasingly impacting human security across the region

While climate change has been seen as a purely environmental challenge for many years, there has been a shift recently linking it more closely to political and security issues. The effects of climate change and natural disasters can combine with other factors to increase risk, prevalence, duration, or intensity of violent conflict. Furthermore, according to the Intergovernmental Panel on Climate Change (IPCC), the additional pressures brought by climate change will increase vulnerability and the risk of violent conflict, especially in those places that are characterised by a history of conflict, marginalisation and exclusion, and weak governance.¹⁷

The region is becoming increasingly affected by climate change and natural disasters. Recent research shows that economies in the region will experience significant climate change-related hazards, including droughts, heatwaves, tropical storms, and wildfires. Given the region's reliance on hydropower, and its position as a highly trafficked land route for migration to the European Union, these climate impacts could result in cascading security risks and undermine critical developments gains.¹⁸ For instance, in early 2023, states of emergency were declared across the economies of the WB after significant damages and loss in human life.¹⁹ Events such as these are becoming more frequent, not only in the region but throughout the world.

Some of the impacts of not addressing the security risks posed by climate change and natural disasters include: 1) heightening of existing post-conflict tensions. The scarcity and competition for resources in an increasingly challenged environment can lead to intensification of conflict as shown by numerous studies in recent years.

14 International Organisation for Migration. Migration Trends in the Western Balkans in 2022.

Online: https://bih.iom.int/sites/g/files/tmzbdl1076/files/documents/WB_Annual_Report.pdf

15 Ibid.

16 Council of the EU. November 2022. Border management: Council authorises the opening of negotiations with four Western Balkans partners on Frontex cooperation. Online: <https://www.consilium.europa.eu/en/press/press-releases/2022/11/18/border-management-council-authorises-the-opening-of-negotiations-with-four-western-balkans-partners-on-frontex-cooperation/>

17 UNEP. 2022. Reimagining the Human-Environment Relationship: Why Climate Change Matters for Human Security. Online: <https://reliefweb.int/report/world/reimagining-human-environment-relationship-why-climate-change-matters-human-security>

18 Sikorsky, E & Hugh, B. 2023. Climate Security Scenarios in the Western Balkans.

Online: https://weatheringrisk.org/sites/default/files/document/Climate_Security_Scenarios_Balkans.pdf

19 Balkan Insight. January 2023. Floods in Western Balkans Cause Huge Damage, Drownings. Online: <https://balkaninsight.com/2023/01/20/floods-in-western-balkans-cause-huge-damage-drownings/#:~:text=States%20of%20emergency%20have%20been,Montenegro%20and%20Serbia%20reportedly%20drowned>

As the region faces serious disaster risks, they have the potential to devastate the economies and livelihoods of people from the region, with especially heightened risk for the agricultural sector. These events can spark irregular population movements and challenges for governance. Therefore, additional climate stressors may pose a threat to the security of the region. 2) Lack of investment by economies in the region and the EU may lead to opportunities for outside investment and influence from other actors such as Russia and China, enhancing their power and influence in the region, which is intertwined with other areas such as malign foreign influence and anti-democratic narratives.²⁰

The War in Ukraine and rising tensions in the region

The war in Ukraine has brought war back to European soil accompanied with tensions in the region. Its impact has been felt in the geopolitical realm, in economy and internal politics of the economies in the region. Centripetal forces in Bosnia and Herzegovina and political turbulence in Kosovo*, together with traditionally sour relations between Belgrade and Pristina are the main spokes in the wheel of regional cooperation. The Montenegrin political and social scene has also been marked by political polarisation in the last three years. These events are developing amidst the geopolitical strife exacerbated by the war in Ukraine. As the findings of this year's survey show, there is fear over safety in the region if the war in Ukraine continues further into the future.

20 International Military Council on Climate and Security. 2022. Climate Security Snapshot: the Balkans. Online: https://councilonstrategicrisks.org/wp-content/uploads/2022/07/Climate-Security-Snapshot-The-Balkans_World-Climate-and-Security-Report-2022.pdf

Key Findings

Relatively high dissatisfaction with the general situation in the WB economies

Overall, close to half (45%) of the respondents feel mostly or completely dissatisfied with the general situation in their economy, a steady increase from 2021 (36%) and a slight increase from 2022 when 42% of respondents were dissatisfied. Serbia and Montenegro have seen the most significant increase in dissatisfaction, with Kosovo* the only economy seeing a move in the opposite direction and North Macedonia standing at the same level in all three iterations of the survey. After a significant 2022 uptick of respondents who felt mostly or completely dissatisfied with the situation in Albania, 58% compared to 40% in 2021, the percentage in the current iteration of the survey is closer to the 2021 figure, standing at 43%, and marking a slight improvement. Bosnia and Herzegovina has seen a dramatic increase from the 2021 iteration of the survey, when 43% of respondents reported dissatisfaction with the general situation, compared to 56% in the current iteration, a 30% increase. Only 18% of respondents feel completely or mostly satisfied with the situation, second lowest in the region. Kosovo* reports amongst the lowest levels of dissatisfaction in 2023, compared to other economies in the region, with 24% reporting dissatisfaction with the general situation, with the majority, almost one in two, feeling ambiguous. Compared to the previous surveys, there is a generally positive trend in Kosovo* from 2021 when more than 1 in 3 reported to be dissatisfied compared to almost half reporting to be satisfied in 2022.

Montenegro has experienced a reverse trend compared to Kosovo*. While in 2021 62% reported being satisfied with the general situation in their communities, in 2023 the figures almost swapped, with 40% reporting feeling dissatisfied and 26% satisfied. Therefore, the percentage of those satisfied decreased 1.4 times. This negative trend in Montenegro could be explained by the highly polarised political situation, and other tensions most notable in 2022. Levels of dissatisfaction in North Macedonia have remained steady at around 50% since 2021. Similarly, levels of satisfaction have hovered close to 15% with the exception of 2022 when there was a slight increase to 19%. In 2023, one in two respondents in Serbia reported feeling dissatisfied, a complete reverse from the two previous surveys, where the majority felt satisfied or completely satisfied with the situation in their community. Only 22% reported being satisfied in 2023. This could be closely linked to recent developments in Serbia, which saw massive protests following the mass shootings in May, close to the period in which the survey was administered.

One of the compounding factors influencing levels of dissatisfaction with the general situation in the economies of the region relate to high levels of perceived corruption. The overwhelming majority of respondents (86%) believe corruption is somewhat or very widespread, with Serbia ranking first (90%) followed by Albania (87%). Even more significantly, one in two respondents overall in the region see corruption deeply entrenched in their economies (reporting that corruption is very widespread). Nations in Transit scores on corruption mirror this perception, where scores hover around 3 out of 7, with Albania being the only economy recording a slight improvement in 2023 compared to other economies that saw either a decline (Bosnia and Herzegovina) or similar scores to previous years. It should be noted that in general corruption earns amongst the lowest scores in all categories covered by the report.²¹ Responses to questions around corruption paint a pessimistic picture of widespread corruption, acceptance that corrupt practices, both petty and grand, are a normal part of life in the economies of the WB region and that response to corruption is inefficient and insufficient. This strong belief that

21 Freedom House. 2023. Nations in Transit 2023. Online: https://freedomhouse.org/sites/default/files/2023-05/NIT_2023_Digital.pdf

perpetrators of corruption will generally “get away with it” fuels perceptions that corruption may sometimes be the only way to receive public services.

Serious and organised crime as a key security risk

The perception of organised crime as a significant security concern remains consistent amongst the region’s population. This year’s survey, consistent with previous surveys, indicates that approximately 60% of respondents ranked organised crime as their top security concern.

In line with this, over 60% of respondents consider it extremely important to address serious and organised crime in their community, a much higher percentage than other areas, followed by terrorism (49%) and probability of armed conflict (47%). In addition, there is a strong sense amongst the respondents that police and law enforcement should perform better at tackling organised crime, share information with the EU and North Atlantic Treaty Organisation (NATO) and amongst different economies in the region to strengthen joint responses. An overwhelming majority (over 80%) agree or totally agree that there should be closer collaboration and exchange of information. Corruption and inefficient judiciary response as well as interference by politicians are blamed for the inefficient response to organised crime and terrorism with almost 90% of respondents identifying them as obstacles to tackling these issues.

Misuse of firearms and arms trafficking features in top three concerns for first time

For the first time since the 2021 survey, misuse of firearms ranks second amongst the factors negatively impacting feelings of security for respondents. While in 2021 the top three concerns were economic crises, crime and the pandemic and in 2022 economic crises, crime and war or political instability, in 2023 crime jumped to number one, followed by misuse of firearms and arms trafficking, which ranked fifth in 2021 and sixth in 2022. There could be two possible explanations for this factor featuring prominently in 2023. First, the administration of the survey coincided with two consecutive mass shootings in Serbia, which gained attention across the region. In addition, the war in Ukraine, featuring significantly in news reports in the region, may have impacted an increase in feelings of fear over potential arms trafficking from the region to the war zones. Second, it should be noted that economic crises and the pandemic were not included in the current survey, which may explain partially the shift in answers in the current [SecuriMeter](#).

In line with being concerned over the misuse of firearms, the vast majority (81%) of respondents would not consider owning a gun, with respondents in Albania (91%) and North Macedonia (88%) having the strongest feelings against gun ownership and respondents in Montenegro (72%) and Bosnia and Herzegovina (75%) the least. Serbia presents an interesting trend, especially in light of the recent mass shootings. Whereas in 2022 about 89% would not consider owning a gun, this figure in 2023 dropped to 77%. It is possible respondents felt owning a gun for self-defence would better protect against deadly incidents of gun violence. In fact, when asked about the reasons for owning a gun, 69% of respondents in Serbia said for protection/safety, slightly higher than the regional average (60%).

Probability of an armed conflict along ethnic lines

Possibility of an armed conflict between different ethnic groups/political instability in the region is considered a factor negatively impacting feelings of security for 47% of respondents, ranking in the top three. Respondents in Kosovo* and Serbia show the most concern for the possibility of an armed conflict with around one in two respondents saying this impacts negatively their feeling of security. This could be explained by the tensions in the north of Kosovo* in late 2022 and early 2023, around the time the survey was administered in the region.

In fact, in Kosovo* the possibility of war is ranked first, while in other economies crime and misuse of firearms is overwhelmingly considered a concern for their feeling of safety.

Fears over instability in the region highlight the importance of regional cooperation in the security realm, but also more broadly. There are varying viewpoints within the Western Balkans region concerning security cooperation mechanisms. The results stress the significance of comprehending each economy's distinct security priorities and the requirement for subtle strategies in tackling security challenges to foster regional stability and economic advancement. Interestingly, Serbia (28%) and Kosovo*(28%) stand out with the highest levels of support for regional cooperation. This could indicate a desire to prevent tensions from escalating and a repeat of the past.

Less worry about the impact of the war in Ukraine now, but a drawn-out conflict increases uneasiness

The majority of respondents from the region do not feel insecure now because of the war in Ukraine. Overall, one in three tend to feel insecure, but the continuation of the aggression into the future increases the sense of insecurity from 35% to 41%. Serbia presents a paradox, as it has the lowest percentage of respondents that feel insecure now due to the war, but the highest percentage of respondents who would feel insecure in their economy if it continued indefinitely. Respondents from Kosovo* and Albania are most concerned about the impact of the war in their economy, while those in Serbia and Montenegro are the least insecure.

While respondents agree that a drawn-out war in Ukraine will negatively impact their economy, there is surprisingly low support for different actions to tackle Russia's continued aggression. In almost all economies of the region support towards EU sanctions against Russia is below 50%. Albania is the only outlier with 90% of respondents agreeing that their economy should adopt sanctions, with a marked decrease in those who agree that their economy should donate weapons and that civilians should be allowed to join the fighting (73% and 70% respectively). Almost two in three respondents in Serbia disagree with EU sanctions and almost 80% disagree that their economy should export weapons to Ukraine.

Lukewarm feelings towards welcoming migrants but most are in agreement about the need for joint border/boundary control

Respondents are almost equally split when it comes to accepting labour migrants from other economies. Only 11% totally agree that their economies should encourage labour migrants from other economies, while 18% totally disagree. The rest are split equally between agreement and disagreement. Albania and Kosovo* are the exception, with over 60% of respondents being open to encouraging the phenomenon (61% and 63% respectively). On the opposite spectrum, over 60% of respondents in Serbia do not agree that their economy should encourage migrants moving to Serbia (64%). This general lukewarm feeling could also be explained by a belief amongst respondents that public discourse on immigration is not based on facts. This shows a need for more public education and tackling possible anti-migrant sentiments. While a majority of respondents agree that their governments should offer asylum and protection to people in need (70%) a bigger number believe that the EU should carry a heavier burden in accepting migrants compared to WB economies (82%). Additionally, 80% now back a joint plan for collective migration governance, up from 43% in 2021.

Disinformation and cybersecurity catching up with citizens, but identifying disinformation still challenging

The ubiquity of social media and advances in technology are posing increasing threats to governments and people around the world, with the WB region not being immune to these global trends. While disinformation is featuring more prominently compared to previous years, there is still more to be done to inform and educate

the public on the risks posed by this phenomenon. In recent years several WB economies have experienced a series of cyber-attacks,²² affecting critical infrastructure and going as far as to propose establishment of agencies to tackle cybercrime such as in Kosovo*²³. This threat however has yet to catch up with citizens in the region, even though it is notable that cybercrime is more on the radar of citizens compared to the two previous editions of the survey. These threats are mentioned by 1 in 4 respondents as negatively impacting their sense of security. Compared to 2022, these security threats rank higher in the list of concerns, showing a growing awareness of the phenomenon and in light of the increasing importance and reliance on the online sphere for receiving information and shaping opinions.

Western Balkan economies have some of the lowest media literacy rates in Europe, as well as low levels of trust in public institutions including media, political parties, governments, and parliaments. According to the 2023 Media Literacy Index economies of the Western Balkans rank at the bottom in terms of media literacy and resilience to disinformation. Kosovo* ranked 40th, North Macedonia 39th, Bosnia and Herzegovina 37th, and Albania 38th out of a total of 41 economies analysed. Serbia fares relatively better in the region, ranking 31st. According to the index, these economies are the most vulnerable to the effects of disinformation.²⁴ This is in line with previous iterations of *SecuriMeter*, where a considerable percentage of respondents in Kosovo* did not see this as a problem. Montenegrins and Serbs consider the threat of disinformation and fake news as more acute in their economy (92% of respondents in Serbia said this is a problem in their economy).

Fake news negatively influences democratic reforms in the region. Misleading information, fake news and disinformation campaigns are also tools for foreign, malign actors that want to influence the security of the region. Western Balkan respondents perceive dissemination of fake news as an acute threat (79%), with Kosovo* being an exception where a little over 50% believe fake news and disinformation is not a problem in their economy. In fact, respondents do not feel very confident in identifying news that misrepresent reality. According to the survey findings, they are almost equally split between those who feel confident (51%) and those who do not feel confident they can identify fake news (47%). This implies that efforts should be made to educate the public on digital citizenship, as well as carry massive awareness campaigns on dangers of disinformation.

Online social networks seem to be a double-edged sword in relation to disinformation. On one hand, majority of respondents think social networks are the most preferred institutions to stop the spread of the phenomenon (45%) and on the other, they are also considered the entities that spread disinformation (46%). These networks have become an immense source of global and local news for millions of people around the world. They offer the advantage of being connected and informed in real time about world and local events with a smartphone and a click. However, in recent years, their dark side has been laid bare, most notably with the spread of fake news and disinformation that has been on the rise worldwide²⁵ and in the WB region. Overall, media platforms and journalists are “tasked” with identifying and dispelling fake news and disinformation. In the WB, there are numerous initiatives by media outlets at economy and regional level, therefore there are already efforts by media to uphold professionalism, combat disinformation and fake news, and provide independent reporting.²⁶

22 Balkan Insight. 2023. Battle for Balkan Cybersecurity: Threats and Implications of Biometrics and Digital Identity. Online: <https://balkaninsight.com/2023/06/30/battle-for-balkan-cybersecurity-threats-and-implications-of-biometrics-and-digital-identity/>

23 Balkan Insight. 2022. Kosovo to Establish Agency for Cyber Security Amid Recent Attacks. Online: <https://balkaninsight.com/2022/09/14/kosovo-to-establish-agency-for-cyber-security-amid-recent-attacks/>

24 Open Society Institute. 2023. Media Literacy Index. Online: <https://osis.bg/wp-content/uploads/2023/06/MLI-report-in-English-22.06.pdf>

25 Aimeur et al. 2023. Fake news, disinformation and misinformation in social media: a review. *Social Network Analysis and Mining*. Online: <https://link.springer.com/article/10.1007/s13278-023-01028-5>

26 European Union External Action. 2020. Four Western Balkans’ fact-checking organisations join Facebook’s platform against disinformation. Online: https://www.eeas.europa.eu/eeas/four-western-balkans-fact-checking-organisations-join-facebook-s-platform-against_en

Growing awareness of the impact of natural disasters, but little understanding of specific risks to communities

There has been a steady increase in the percentage of people who agree that natural disasters present a significant threat to human life, from 70% in 2021 to 81% in the current iteration. Respondents from Serbia and Albania tended to agree more strongly with this statement and in larger numbers compared to other economies, with North Macedonia and Kosovo* having the lowest percentage of those who agree or strongly agree with this statement (74%). Albania has seen the sharpest increase, from around 60% in 2021 to 92% in 2023.

Weather extremes are becoming the new normal in the region as in much of the rest of the world, with impacts of climate change being felt more acutely and disrupting peoples' lives. In January 2023, many economies in the region declared states of emergencies due to heavy flooding that left at least six people dead.²⁷ Average regional temperatures could rise by as much as 4 degrees Celsius or more above pre-industrial levels which will mean more frequent droughts, reduced agricultural production, severe water shortages and less hydropower energy. All these risks threaten to disrupt important development gains around the region and pose significant security threats.

While the majority of respondents consider disasters a significant risk for their economies, many of them are not informed about the specific risks in the areas they live. Only 26% feel well informed and active in local decision-making on these issues. While there is increasing awareness of the security risks posed by natural disasters, the opposite trend is observed on the question of awareness of specific risks in the areas where people live and extent to which people are active on these issues. While in 2021 43% felt well informed, in 2023 there was a 47% decrease in the number of respondents that felt well informed. Still, a very small percentage are both well informed and active (3%). More efforts are needed especially at community and local level to inform and educate people not only on the general impact of natural and manmade disasters, but the specific risks in their communities and how they can be active in addressing and tackling these challenges through participation in decision-making at local and economy level.

²⁷ Balkan insight. 2023. Floods in Western Balkans Cause Huge Damage, Drownings.

Online: <https://balkaninsight.com/2023/01/20/floods-in-western-balkans-cause-huge-damage-drownings/>

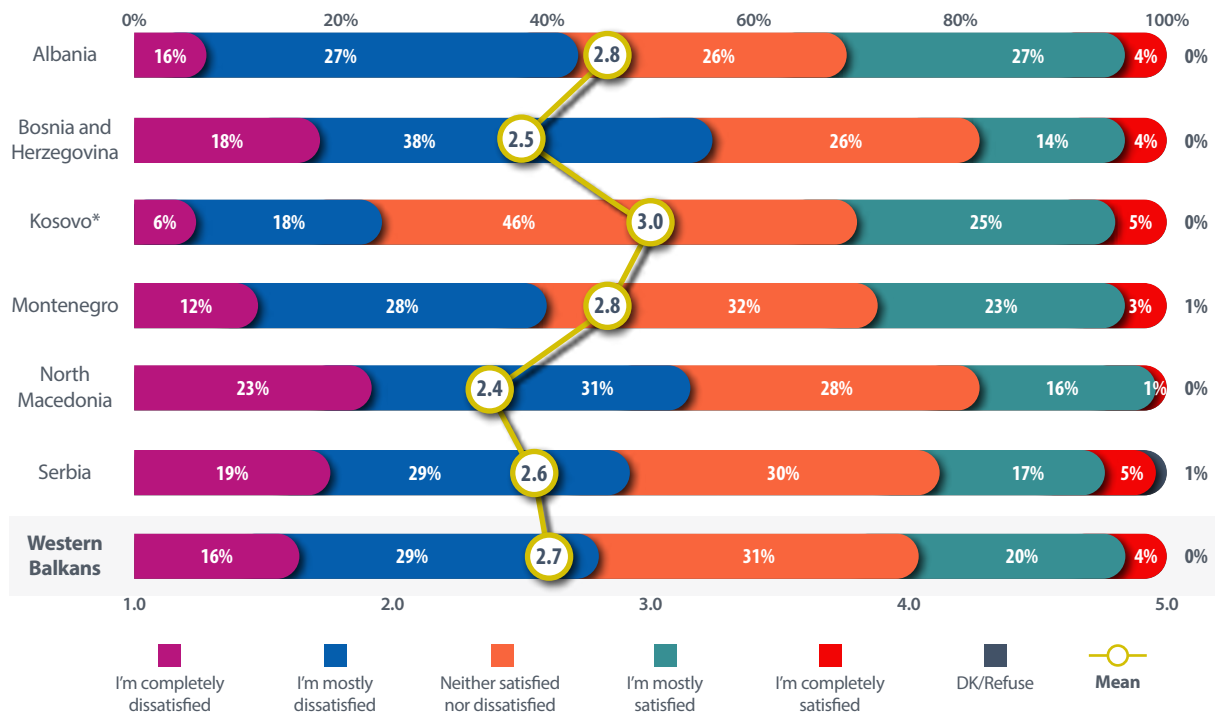
A. General Security Perception

Respondents of the Western Balkans **are not satisfied** with the way **things are going** in their region. Overall, almost half the respondents in the region claim to be completely or mostly dissatisfied (45%), while the percentage of those who are satisfied, mostly or completely, is 24%. The biggest dissatisfaction in the economies of the while most satisfied are the residents of Albania (31%) and Kosovo* (30%). However, it should be noted that a significant percentage of Kosovo* respondents (46%) feel lukewarm, neither satisfied nor dissatisfied.

Figure 1. Satisfaction with the way things are going in each Western Balkan economy

How satisfied are you with the way things are going in your economy?

(All respondents, N=6023, single answer, scale from 1 to 5, share of total, %)



It is noteworthy that there is a growing dissatisfaction since the first survey conducted in 2021. While the 2022 survey showed an overall positive attitude on feelings of security, this year the situation is grimmer. This could be attributed to the multitude of effects of the pandemic and more recently Russia's war of aggression against Ukraine, which may have heightened feelings of current and future insecurity. The ongoing war in Ukraine especially brought a sharp economic downturn, high prices for basic needs and fuel. Therefore, while many citizens in the region may be geographically disconnected from the war zone, its effects have reverberated across the region and globally and felt at an individual and societal level.

Table 1. Comparison of data related to the satisfaction with the way things are going in each Western Balkan economy (in %)

Dissatisfied vs Satisfied	Western Balkans	Albania	Bosnia and Herzegovina	Kosovo*	Montenegro	North Macedonia	Serbia
2021	36-33	40-31	43-30	38-12	12-62	52-17	29-43
2022	42-30	58-20	59-17	20-48	38-32	50-20	28-44
2023	45-24	43-31	56-18	26-30	40-26	54-17	48-22

Compared to last year there are two economies in which respondents have drastically changed their views on the matter, **Albania and Serbia**. In Albania dissatisfaction decreased by 15% and satisfaction increased by 11%, while in Serbia dissatisfaction increased by 20%, while satisfaction decreased by even more, 22%. Finally, in Kosovo*, satisfaction decreased from 48% to 30%, although dissatisfaction increased much less, by 6%.

The reason why respondents in Serbia became so dissatisfied in the first part of 2023, while Albanian ones moved in the opposite direction, is very difficult to ascertain. In Serbia, a series of violent incidents and mass protests that began in May 2023 might provide some context to the sharp rise in dissatisfaction. Known as the Serbia against Violence protests, these demonstrations drew tens of thousands of participants and coincided with the [SecuriMeter 2023](#) survey data collection period. While these incidents potentially explain the mood shifts, they remain hypothetical and further research could yield more definitive insights. The changes in public sentiment in Serbia illustrate the complex interplay of regional and global events on local perceptions, emphasizing the need for a nuanced approach to understanding public sentiment in this economy. The survey data for the [SecuriMeter 2023](#) was collected in the period from 14 May to 2 June 2023. A potential explanation for the shift of mood amongst respondents in Albania is the fact that the European Union (EU) opened accession talks with Albania in July 2022 and later held the EU-Western Balkans Summit in Tirana in November 2022, described by European Commission President Ursula von der Leyen as a “historic moment.” This event could have bolstered positive sentiments and renewed hope amongst an already highly EU-enthusiastic population.

As far as security in the region overall is concerned, one in two respondents in the region **feel the Western Balkans is a secure place to live in**. Respondents in Albania believe the most that the Western Balkan region is a secure place to live in (68%), while respondents in Kosovo* the least (45%). A worrying sign is that the trend is negative as far as the feeling of security of the region as a whole. Namely, year by year the feeling of security is **declining**, and the feeling of insecurity rising in the Western Balkans. Taken separately, the feeling of security of the Western Balkan region has dropped most significantly in Montenegro, from 84% in 2021 to 56% in 2023. The prospect of a spillover from Russia’s war in Ukraine and heightening of tensions in the region, especially in Serbia, Kosovo* and Bosnia and Herzegovina, may explain the drop in respondents’ feeling of security in the region.

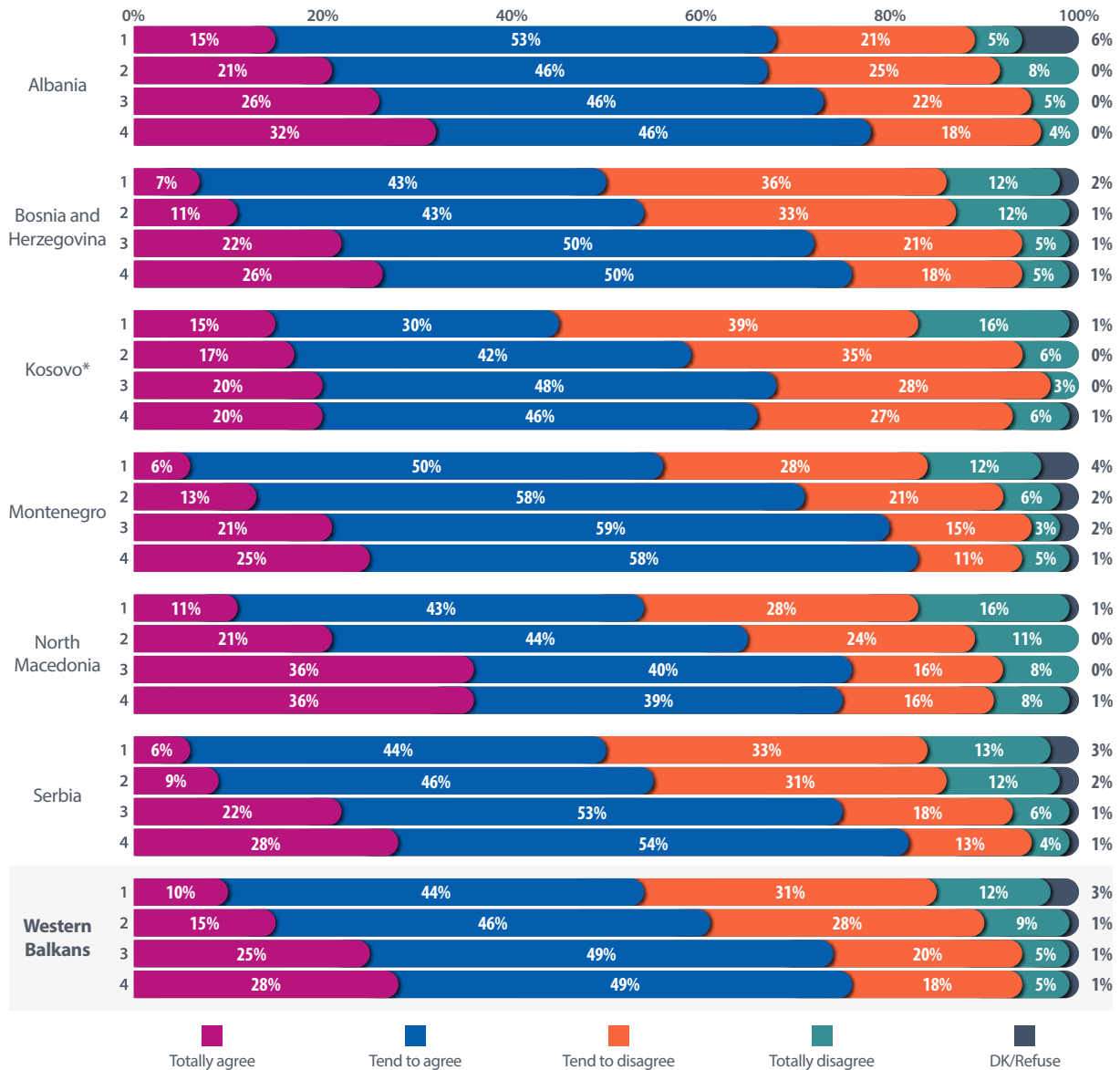
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Figure 2. Agree or disagree with the statements about security

To what extent do you agree or disagree with each of the following statements about public security?

1) Western Balkan region is a secure place to live in. 2) Our economy is a secure place to live in. 3) Your city\ town\ village is a secure place to live in. 4) Your immediate neighbourhood is a secure place to live in.

(All respondents, N=6023, single answer, scale from 1 to 5, share of total, %)

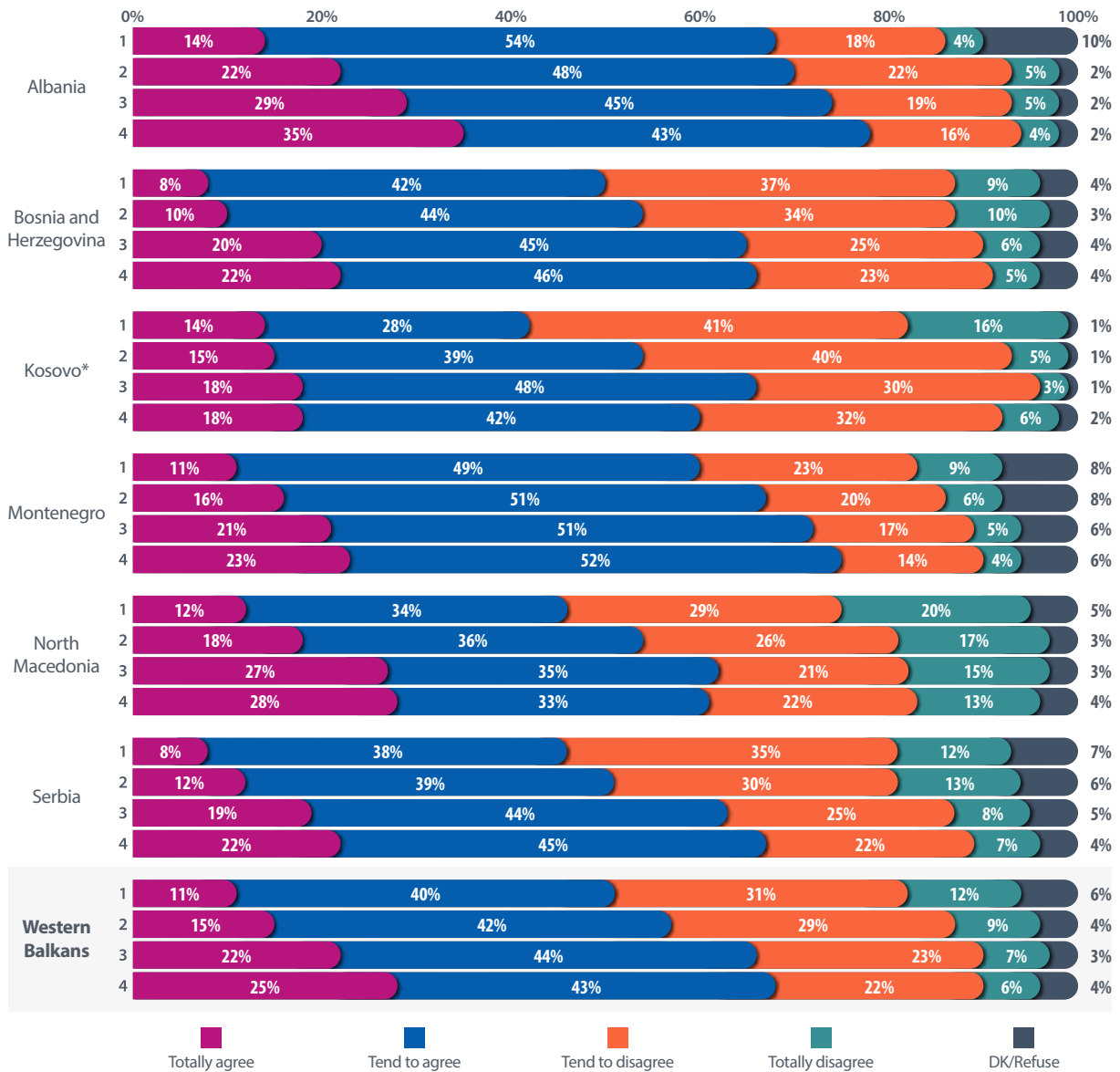


There is slight optimism regarding future security in the region since the majority of respondents taken as a whole and within the economies agreed or totally agreed with the statement that “Western Balkan region will be a **more secure place** to live in.” A slight majority of Western Balkan respondents or 51% agree (totally and tend to agree) that the region will be a more secure place to live in the following year. However, substantial part of them, some 43% do not agree with this statement. While the subsidence of the pandemic effects could be a cause for celebration, coming out of three years of intense fears in an unknown environment, the ongoing war in Ukraine, while not as present as the pandemic in the daily lives of citizens, may be the cause for concern and cautiousness regarding the future of the security in the region.

Figure 3. Agree or disagree on public security in Western Balkans

To what extent do you agree or disagree with each of the following statements about public security in the following 12 months?

1) Western Balkan region will be a more secure place to live in. 2) Our economy will be a more secure place to live in. 3) Your city\ town\ village will be a more secure place to live in. 4) Your immediate neighbourhood will be a more secure place to live in.
(All respondents, N=6023, single answer, scale from 1 to 5, share of total, %)



Respondents in Kosovo* (42% who agree) and respondents in Serbia (46%) are again the least optimistic. Albania (68%) and Montenegro (60%) are the most optimistic economies, while North Macedonia and Bosnia and Herzegovina are somewhere in the middle. Similar are the results to the question whether a given economy “will be a more secure place to live in”. Respondents in Kosovo* (54% who agree) and respondents in Serbia (51%) are again the least optimistic. Following Russia’s unprovoked and unjustified aggression against Ukraine, Serbia did not align with the EU restrictive measures against Russia and majority of Declarations by the High Representative on behalf of the EU on this matter.²⁸ Respondents in Bosnia and Herzegovina (54% who agree) are moderate optimists, which is a result of many different factors combining internal political dynamics and longstanding constitutional crisis with granting BiH an EU candidate status. Respondents in North Macedonia

28 Directorate-General for Neighbourhood and Enlargement Negotiations, 2023. Serbia 2022 Report.

Online: [Serbia Report 2022.pdf \(europa.eu\)](#)

are also cautiously optimistic (54% agreeing). The economy's interethnic balance is fragile and easily influenced by tensions and potential conflicts in the region. Montenegro respondents (67% agree) and respondents in Albania (70%) again lead the region as far as optimism in security matters is concerned.

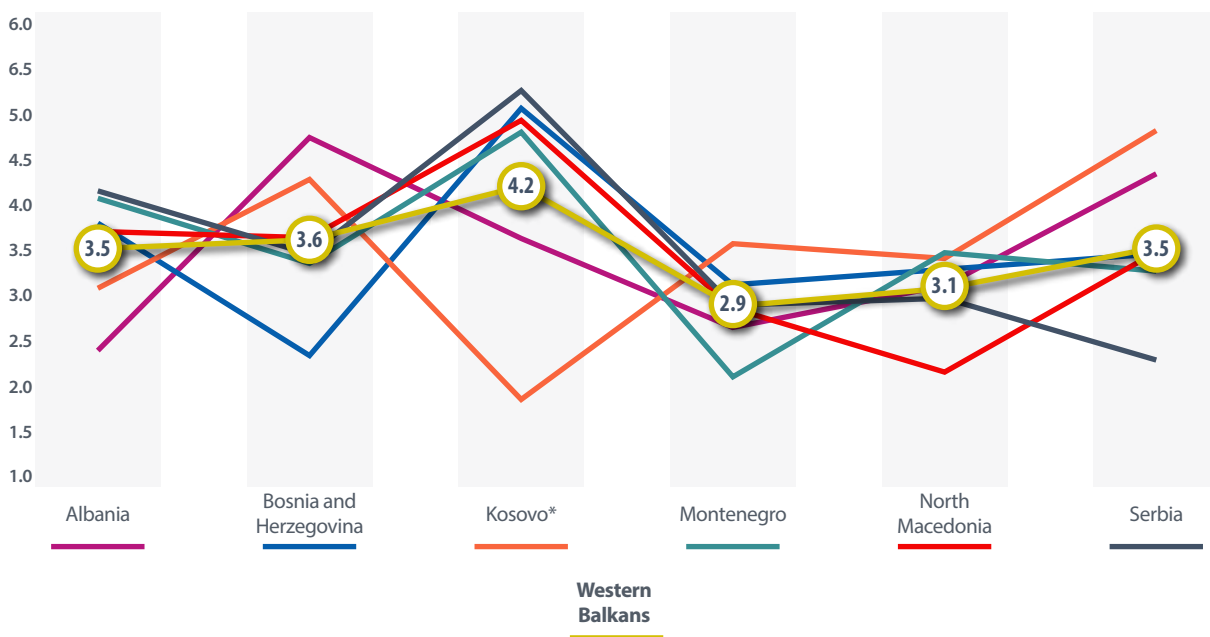
Respondents' views on the security of their economy today and in the future

Pessimistic views are held by the respondents in the region regarding the future of the security of their economy. As a whole, Western Balkan respondents do not feel that there will be improvements. In Albania there is slight optimism, in Bosnia and Herzegovina and Serbia the views are that the situation will not change, whereas there is slight pessimism in Montenegro and Kosovo*, and a significant one in North Macedonia with 19% of respondents believing less that the economy will be a secure place to live in the future compared to their feelings on security today.

Perceptions of citizens on the security of economies other than their own

In addition to assessing the security of their own economies, respondents were also asked to share their thoughts on the situation in other economies of the region. Respondents in Albania and those in Kosovo* rank the security situation in Serbia the worst. There is a unified view that Kosovo* is the least safe place to live, while these perceptions are more diversified for Albania and Serbia. On the other hand, respondents in Serbia and those in Montenegro consider Albania to be less safe than respondents from other economies. Overall, Montenegro and North Macedonia are considered the safest places in the region. These findings, as the figure below shows are highly divided along historical perceptions about different economies, probably influenced by historical events, language divisions and commonalities. It is important to increase efforts at community and individual level to dispel negative perceptions and fears, and increase contacts between communities across different economies.

Figure 4. Security of individual economies per the opinion of all Western Balkan respondents
Which economies of the WB region are secure place to live in? Could you rank these 6 (six) economies in an order according to how you perceive security situation in each of them? The first rank is the economy which you perceive as the safest place to live in and the sixth is the least secure place to live in.
(All respondents, N=6023, single answer, rank from 1 which means the safest and 6 which means the least secure, mean)

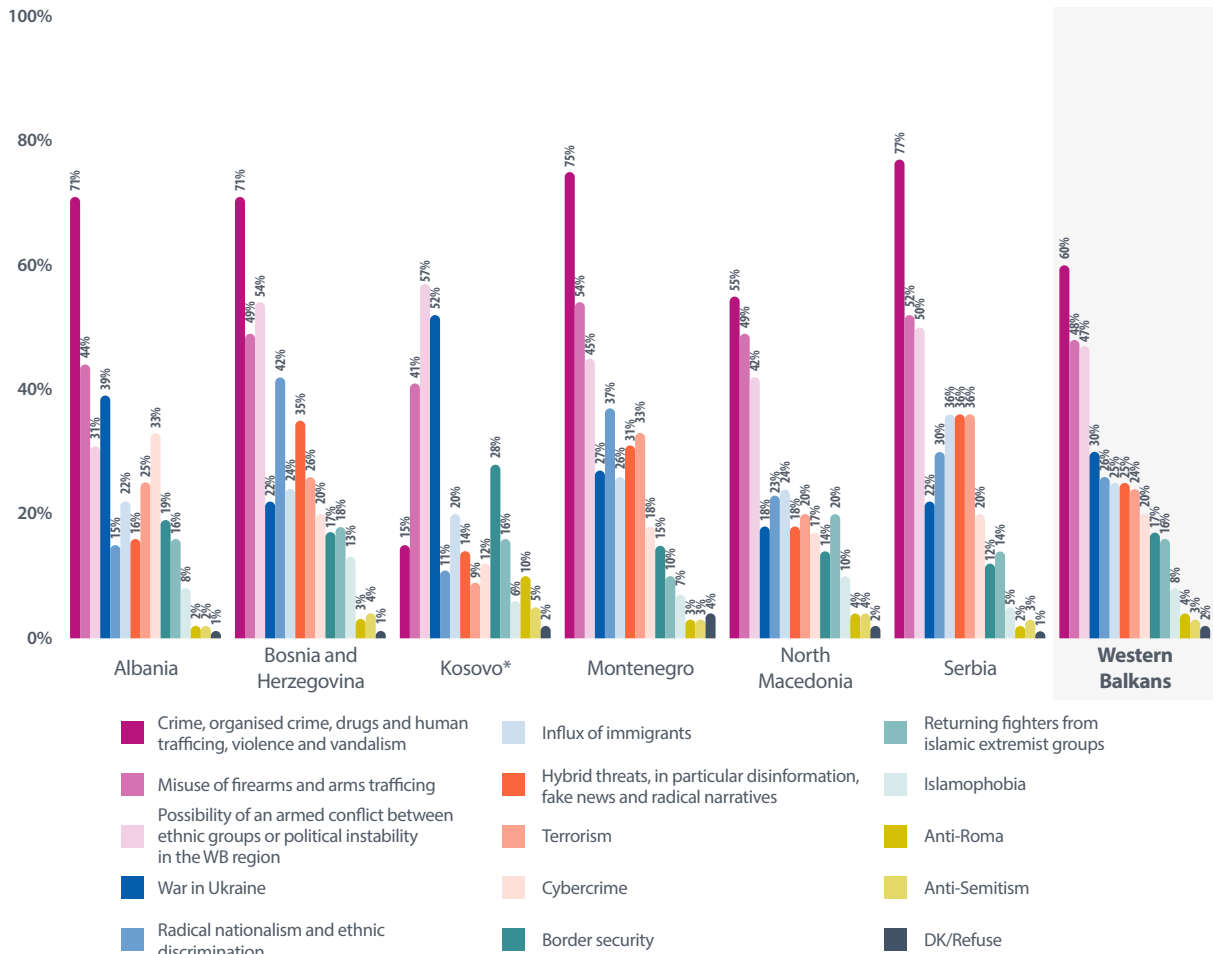


Causes of insecurity

To better understand and explain the feelings of insecurity of respondents across the region, they were asked to list the top causes of insecurity in their economies. Across the region, the top three issues that cause negative feelings of security are crime, organised crime, drugs and human trafficking, violence or vandalism (60%), followed by misuse of firearms and arms trafficking (48%). While concerns over crime have remained stable since 2021, the **concern over the “misuse of firearms and arms trafficking”** has risen by 18% compared to last year. This concern is **universal** for the whole region and has seen a significant increase. One possible explanation for misuse of firearms earning a top spot on respondents’ feeling of concern may be the war in Ukraine. A substantial quantity of arms and weapons has been supplied to Kiev, and fears are that due to the difficult circumstances at the front, and due to possible corruption, arms will be trafficked to the region. The recent shootings in Serbia, which reverberated across the region, may have also impacted citizens’ responses to this question. The events sparked economy-wide debate on tougher gun control mechanisms and implementation of laws in this area

Understandably, the war in Ukraine ranks amongst the top three concerns. Kosovans are most concerned with the “possibility of an **armed conflict between ethnic groups** or political instability in the WB region” with 57% prevalence of this answer, a significant rise in comparison to 2022 and 2021, when the percentages were 25% and 21% respectively. No other economy has seen such a sharp rise in the answers to this question, perhaps a testimony to the tensions in north parts of Kosovo* in 2023.

Figure 5. Opinion on the phenomena that negatively impact the feeling of security
Which 4 (four) of the following have the most negative impact on your feeling of security?
(All respondents, N=6023, maximum/top 4 (four) answers, share of total, %)



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However, when asked about how important is to address the challenge of the probability of armed conflicts between ethnic groups or separatist political ideologies for the internal security of their economy, respondents in Kosovo* register low levels of anxiety as only 10% deem this extremely important. In comparison, 71% of respondents in North Macedonia, 62% in Serbia, 59% in Montenegro and 58% in Bosnia and Herzegovina do so. (Date taken from Figure 6 bellow) Even respondents in Albania (25%) have bigger concerns on this issue than the ones in Kosovo*. Thus, there is a strong discrepancy of opinion of Kosovo* respondents regarding the threat of armed conflict in the whole region and in the economy. They fear a possibility of armed conflict in the region, but fear less such conflict domestically.

Figure 6. Perceived Importance of Addressing Security Challenges in Western Balkan Economies
Could you give a score from 1 to 4 on how important do you consider is addressing
he following challenges for the internal security of your economy? – Results for the Western Balkan region

(All respondents, N=6023, single answer, scale from 1 to 4, share of total, %)

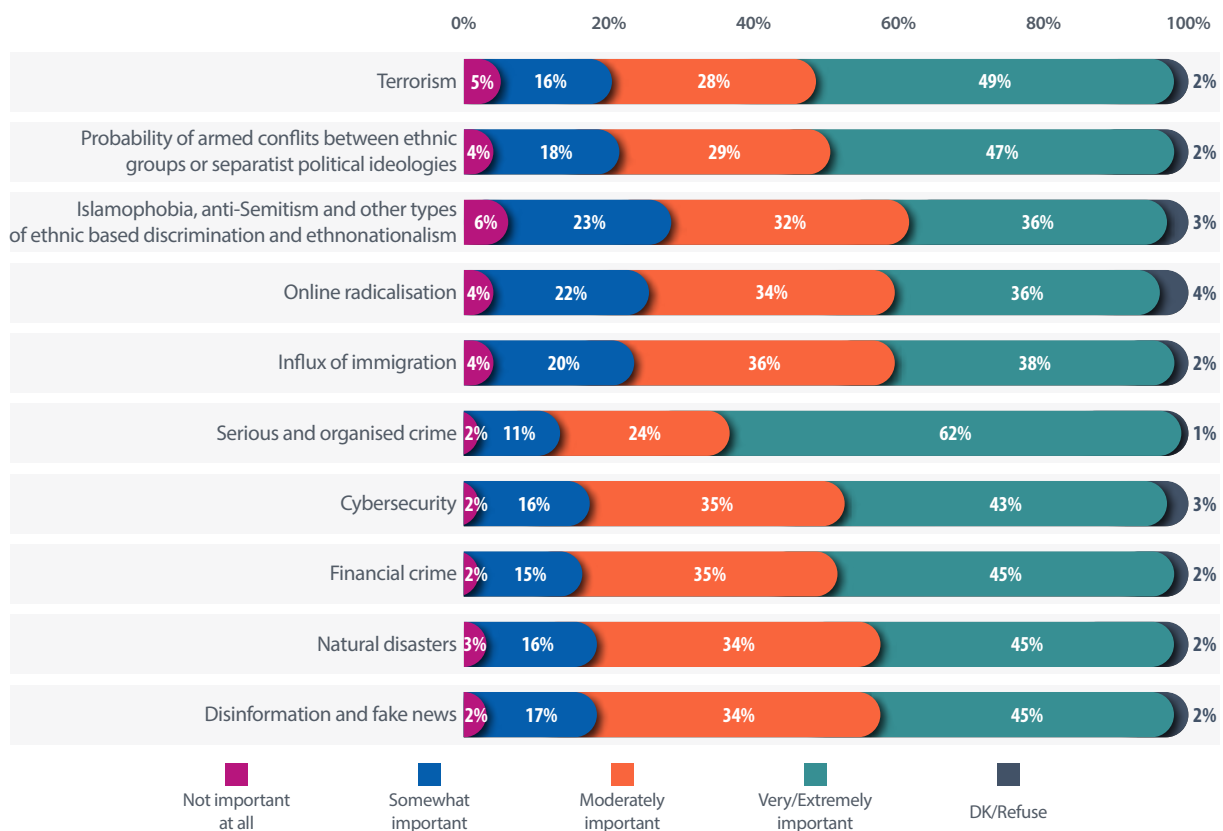


Table 2. Opinion on the most important issues that must be addressed for the internal security in each Western Balkan economy

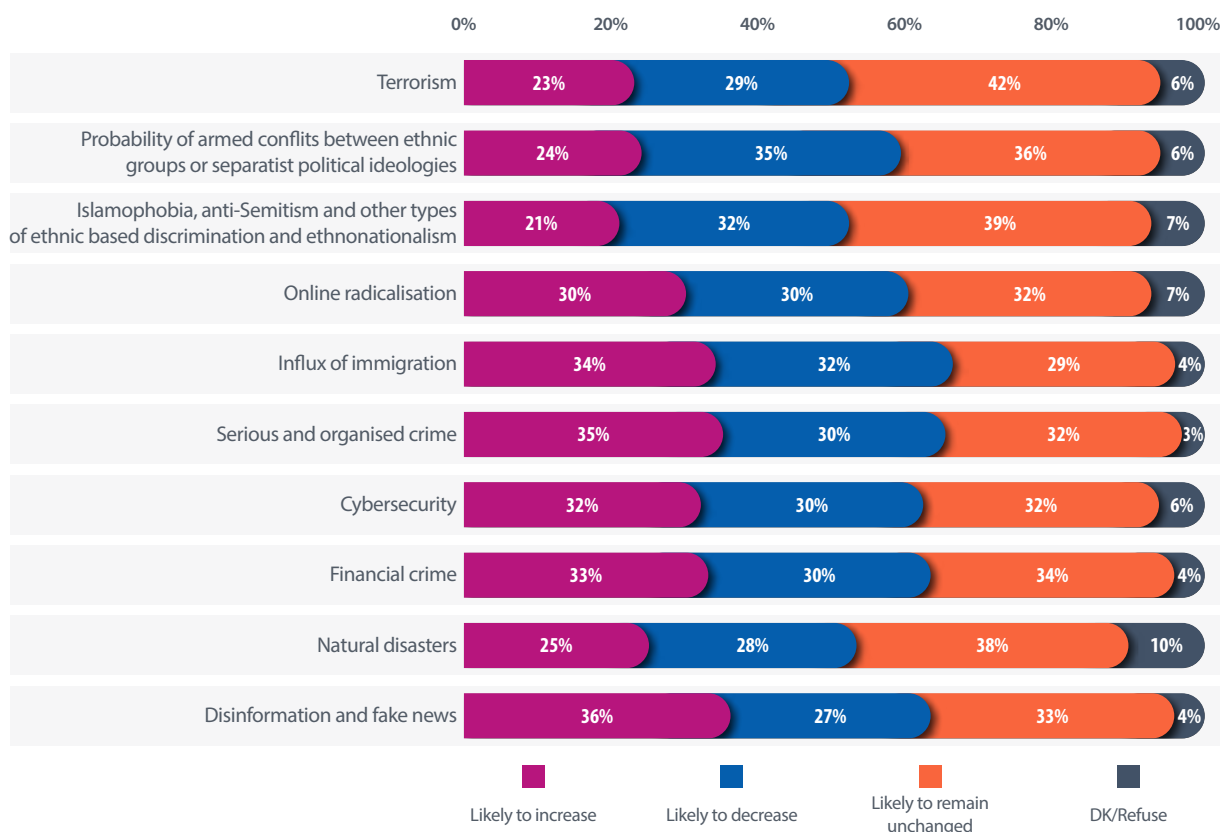
		1	2	3	4	5	6	7	8	9	10
Albania	Not important	11%	10%	9%	3%	3%	2%	1%	1%	2%	2%
	Somewhat important	25%	29%	31%	23%	22%	7%	11%	16%	16%	24%
	Moderately important	28%	32%	35%	38%	47%	28%	38%	38%	37%	43%
	Extremely important	35%	25%	21%	31%	28%	63%	46%	43%	44%	30%
	DK/Refuse	2%	4%	3%	5%	1%	0%	4%	2%	1%	1%
Bosnia and Herzegovina	Not important	4%	4%	10%	6%	6%	2%	4%	3%	5%	3%
	Somewhat important	19%	17%	17%	22%	23%	9%	20%	13%	17%	16%
	Moderately important	26%	19%	26%	33%	33%	17%	33%	29%	28%	30%
	Extremely important	49%	58%	43%	36%	36%	70%	39%	52%	48%	50%
	DK/Refuse	2%	2%	4%	3%	2%	2%	3%	2%	2%	2%
Kosovo*	Not important	5%	2%	2%	3%	2%	2%	3%	2%	3%	2%
	Somewhat important	21%	31%	40%	40%	31%	32%	31%	28%	29%	25%
	Moderately important	46%	56%	49%	45%	55%	54%	54%	57%	54%	54%
	Extremely important	28%	10%	9%	11%	11%	11%	12%	12%	12%	16%
	DK/Refuse	1%	1%	1%	1%	1%	0%	1%	1%	2%	2%
Montenegro	Not important	3%	2%	6%	4%	7%	1%	2%	2%	3%	2%
	Somewhat important	13%	11%	18%	17%	21%	5%	13%	12%	13%	12%
	Moderately important	26%	25%	28%	32%	29%	13%	30%	31%	27%	28%
	Extremely important	54%	59%	42%	40%	39%	77%	49%	52%	54%	55%
	DK/Refuse	4%	4%	6%	7%	5%	4%	5%	3%	3%	3%
North Macedonia	Not important	2%	2%	3%	2%	2%	2%	2%	2%	3%	2%
	Somewhat important	7%	8%	9%	8%	8%	7%	8%	8%	10%	11%
	Moderately important	19%	18%	23%	25%	25%	19%	23%	21%	23%	25%
	Extremely important	71%	71%	63%	61%	63%	71%	63%	66%	62%	60%
	DK/Refuse	1%	1%	2%	4%	2%	1%	4%	2%	2%	2%
Serbia	Not important	3%	2%	6%	6%	4%	1%	3%	2%	3%	2%
	Somewhat important	11%	11%	21%	20%	19%	4%	13%	15%	12%	12%
	Moderately important	24%	24%	31%	32%	27%	12%	30%	35%	31%	22%
	Extremely important	60%	62%	38%	36%	48%	80%	51%	45%	51%	62%
	DK/Refuse	2%	2%	5%	6%	2%	2%	3%	2%	2%	2%

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As far as the feeling of the future threat of armed conflicts is concerned, citizens of the region mostly believe that it will remain unchanged, with respondents in Kosovo* and in Albania sharing a view that the danger will decrease in time. While most respondents in Bosnia and Herzegovina (46%), Serbia (42%) and North Macedonia (43%) believe the probability of armed conflicts between ethnic groups or separatist political ideologies will remain unchanged, most in Albania (39%) and Kosovo* (69%) feel that it will likely decrease. Respondents in Montenegro equally believe that the situation will remain unchanged and the possibility of this threat will decrease (35%). There is a regional difference here, where respondents in Albania and Kosovo* appear more optimistic about this issue than respondents of other economies. Most concerned seem to be respondents in Serbia where the difference between those who think there is likelihood of increase and decrease of the threat from possible armed conflict is biggest (35-18%). Thus, there is again a strong discrepancy of opinion of Kosovo* residents regarding the likelihood of the threat of armed conflict in their economy to increase vis-à-vis their feeling of this threat for the whole region. (Data from Table 7 Would you say that the following challenges to the security of your economy are likely to increase, likely to decrease or likely to remain unchanged over the next three (3) years? – Results by economies)

Figure 7. Opinion on the challenges that are likely to increase/decrease or remain unchanged in your economy
Would you say that the following challenges to the security of your economy are likely to increase, likely to decrease or likely to remain unchanged over the next three (3) years? – Results for the Western Balkans region

(All respondents, N=6023, single answer, scale from 1 to 3, share of total, %)



What becomes clear from the answers to the questions that have already been posed in 2021 and 2022 is that the **salience** of the issues **decreases** over time. Salience of terrorism as an issue in the region has dropped from 69% in 2021 to 46% in 2023, of influx of immigration from 62% to 38%, of cybersecurity from 61% to 46%, of financial crime from 61% to 45%. Year to year, the salience of natural disasters as an issue has decreased from 50% in 2022 to 45% in 2023, of online radicalisation from 45% to 36%; and of disinformation and fake news from 47 to 45%. Evidently, throughout the years Western Balkan respondents have lowered their concerns regarding various challenges to internal security of their economies. A few new possible challenges to internal security

were added for the first time in the 2023 survey: the probability of armed conflicts between ethnic groups or separatist political ideologies; and Islamophobia, anti-Semitism and other types of ethnic-based discrimination and ethnonationalism.

In general, respondents in North Macedonia have voiced concerns about various possible issues as being threats to internal security (eight out of nine other possible security threats) in the highest percentages compared to the other Western Balkan respondents. Respondents in Kosovo* have expressed least concerns about these ten possible threats, on average just 13% of them believe these are dangers to internal security, compared to 65% of respondents in North Macedonia who say so.

Judging whether specific issues will likely increase, or decrease, or remain unchanged over the next three (3) years, respondents of the region have identified disinformation and fake news as the one most likely to increase (36%) in comparison to other categories followed by serious and organised crime with 35%. Economy-wise, North Macedonia, Bosnia and Herzegovina, and respondents in Serbia hold views that in the next three years the likelihood of different challenges to security will **increase**. Respondents in Albania and Montenegro have mixed feelings about future security challenges. For four of these questions, they believe the security challenge will increase, while for six in Albania and for five in Montenegro they believe that the challenges to security will decrease. Respondents in Kosovo* are great outliers because they hold views that in the next three years the likelihood of all different challenges to security will decrease.

Table 3. Opinion on the challenges that are likely to increase/decrease or remain unchanged in your economy

		1	2	3	4	5	6	7	8	9	10
Albania	Likely to increase	16%	20%	16%	32%	43%	36%	37%	31%	22%	23%
	Likely to decrease	41%	39%	33%	29%	26%	29%	27%	34%	29%	32%
	Likely to remain unchanged	34%	31%	42%	31%	26%	34%	28%	30%	33%	39%
	DK/Refuse	9%	11%	8%	8%	5%	2%	8%	6%	16%	6%
Bosnia and Herzegovina	Likely to increase	24%	27%	25%	31%	31%	45%	34%	42%	36%	46%
	Likely to decrease	22%	22%	21%	21%	36%	17%	20%	17%	18%	17%
	Likely to remain unchanged	48%	46%	44%	40%	29%	35%	39%	38%	41%	34%
	DK/Refuse	5%	4%	10%	7%	4%	3%	6%	3%	5%	3%
Kosovo*	Likely to increase	13%	11%	14%	15%	11%	11%	11%	8%	7%	8%
	Likely to decrease	44%	69%	64%	63%	60%	62%	61%	59%	56%	53%
	Likely to remain unchanged	41%	19%	20%	21%	27%	26%	27%	31%	32%	36%
	DK/Refuse	2%	1%	1%	1%	2%	1%	2%	2%	4%	3%
Montenegro	Likely to increase	26%	22%	19%	30%	40%	32%	32%	29%	29%	44%
	Likely to decrease	26%	35%	35%	28%	25%	34%	28%	33%	22%	25%
	Likely to remain unchanged	40%	35%	38%	32%	27%	28%	31%	31%	34%	24%
	DK/Refuse	8%	8%	9%	9%	7%	6%	9%	7%	14%	6%

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		1	2	3	4	5	6	7	8	9	10
North Macedonia	Likely to increase	24%	28%	28%	38%	44%	40%	34%	43%	28%	40%
	Likely to decrease	24%	25%	23%	22%	21%	20%	22%	20%	24%	22%
	Likely to remain unchanged	45%	43%	40%	31%	30%	36%	36%	34%	37%	33%
	DK/Refuse	7%	5%	9%	9%	5%	4%	8%	4%	11%	4%
Serbia	Likely to increase	37%	35%	25%	36%	39%	47%	42%	42%	26%	54%
	Likely to decrease	14%	18%	19%	17%	26%	18%	19%	16%	16%	13%
	Likely to remain unchanged	44%	42%	49%	38%	31%	33%	33%	37%	48%	30%
	DK/Refuse	5%	5%	7%	9%	4%	2%	6%	5%	9%	3%

If we analyse the issue with most likelihood to be a challenge to the security in the next years per economy, we can conclude that **influx of immigration** is the biggest concern across the economies of the region, followed by disinformation and fake news. However, worries about the influx of immigration have sharply risen only for the respondents in Montenegro in 2023 in comparison to 2022 (from 25% to 40%), while in all the other economies in the region there is a decline in salience of this issue. As far as **disinformation and fake news** are concerned, there is a sharp rise in concerns in Serbia, Montenegro and Bosnia and Herzegovina (36 to 54%; 25 to 44%; 37 to 46% respectively) while there is a modest decline in the other three economies. One other question deserves specific observation, the security challenge of serious and organised crime, (Q7_6) where if we exclude Kosovo* as an outlier, there is a steady rise of concerns in all economies of the region, except in North Macedonia.

Respondents' views on minorities

Attitudes towards minorities remain fractured despite rejection of overt prejudice. While majorities across the Western Balkans reject perceiving minorities as inherent threats or sources of insecurity, sizeable intolerant pockets persist viewing them as such.

Over one-third (35%) see minority groups as generally causing insecurity. Similar share (39%) believes minorities are disproportionately engaged in criminality and distort the cultural integrity. Two-fifths (42%) link the presence of minorities to increased unemployment. However, most (52%) do not think minorities abuse the welfare system or receive special treatment. A majority also rejects the notion that large minority populations hurt education quality, with only 34% believe the opposite.

North Macedonia consistently stands out with respondents perceiving minorities as threats across nearly all areas – insecurity, criminality, cultural distortion, unemployment, welfare exploitation and preferential treatment. This signals deep integration challenges and can be exacerbated by the ongoing developments in the economy, whereby many citizens could feel their EU future is pending until minority issues are resolved. Over the past year, North Macedonia hit an impasse as Bulgaria vetoed accession talks over historical, language and cultural disputes, demanding changes to the constitution which would include the Bulgarian minority as an ethnic group.²⁹

Bosnia and Herzegovina conversely shows the greatest acceptance on most measures. Albania exhibits a contradiction – while over half see minorities inflating joblessness without factual basis, only two-fifths view them as threats. This hints at broader economic anxieties being misdirected towards minorities.

²⁹ Please see council conclusions on enlargement North Macedonia and Albania, Brussels, 18 July 2022, available at: <https://data.consilium.europa.eu/doc/document/ST-11440-2022-INIT/en/pdf>

Belief in disproportionate minority criminality and cultural distortion is strongest in North Macedonia (60%) followed by Serbia (42%). Similarly, perceptions of minorities exacerbating unemployment peak in North Macedonia (53%) and Albania (52%). Unease over preferential treatment and insecurity emanating from minorities remains highest in North Macedonia (61%) and Serbia (54%). Acceptance is markedly higher in Kosovo*, Montenegro and Bosnia and Herzegovina.

However, overwhelming support, ranging between 67% and 87%, exists for policies promoting social cohesion – including legal protections, equal opportunities, engaging civil society against racism and encouraging inter-faith collaboration. Backing for such measures is nearly universal across the region, with minimal divergence between economies. This signals an understanding that diversity requires comprehensive efforts embracing empathy and equity.

Likewise, majority reports acceptance of domestic diversity, undisturbed by those of other nationalities (66%), races (64%) or religions (68%). Acceptance is lowest (52%) but still majority in North Macedonia. It peaks in Montenegro (80%) and Bosnia and Herzegovina (78%).

While ambivalent on Muslim immigration, regarding domestic diversity most display remarkable openness. But pockets of unease remain that warrant attention.

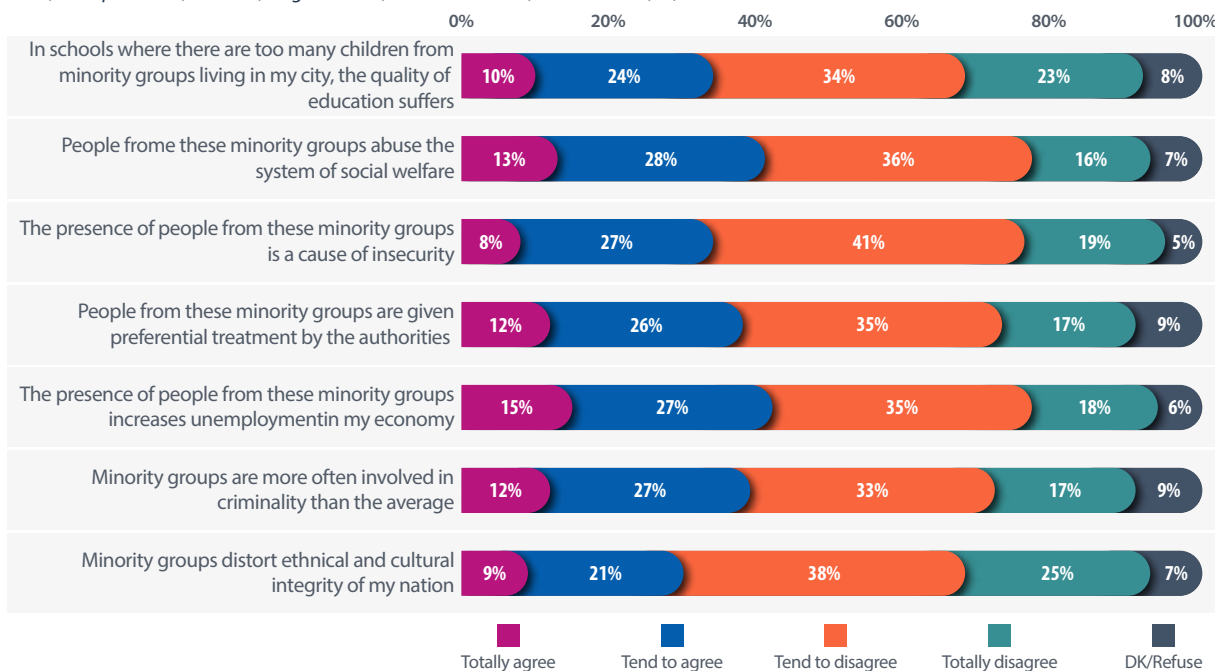
The vast majority (78%) reject that minorities must abandon their cultures for acceptance. However, one-third favour relinquishing practices conflicting with laws – signalling conditionality in inclusion. This contradiction endures sharpest in Albania (44%), North Macedonia (43%) and Serbia (41%) which back assimilation over preservation. Most economies oppose such assimilationist pressures.

Figure 8. Opinion on minority groups

To what extent do you agree or disagree with the following statements regarding minority groups living in your economy?

– Results for the Western Balkans region

(All respondents, N=6023, single answer, scale from 1 to 4, share of total, %)



The belief that the presence of minority groups increases unemployment is strongest in North Macedonia (53%) and in Albania (52%), followed by Serbia (42%), Montenegro (39%), Kosovo* (34%), and faintest in Bosnia and

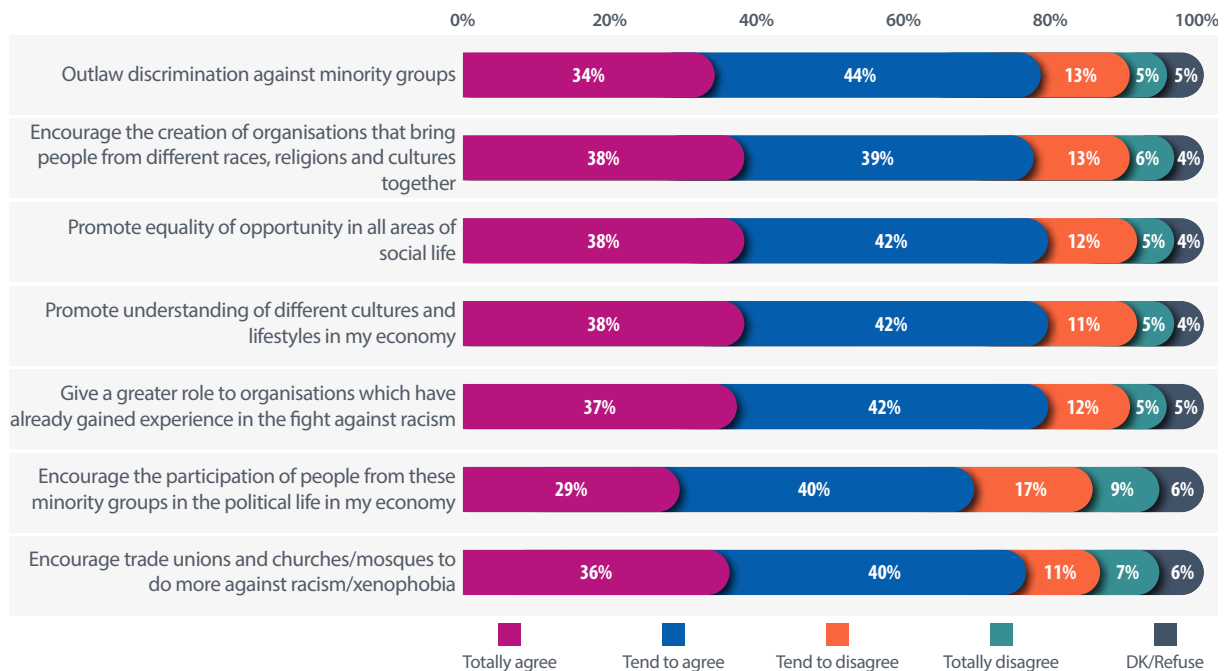
Herzegovina at 26%. According to the World Bank, while there was significant recovery in the economies of the region in early 2022, the outlook is not as optimistic starting from the second half of 2022. The region has seen labour shortages throughout 2022 and into 2023 highlighted as a key concern by businesses across the region.³⁰ In Albania, the labour shortage has prompted policies to “import” low paid labour from other economies.³¹ This may explain the responses of half the respondents in Albania who are concerned that minority groups will increase unemployment. A similar legal initiative was presented in North Macedonia, where despite unemployment persisting, there are still labour shortages.³² These may explain the feelings expressed by respondents in North Macedonia and Albania.

Figure 9. Opinion on what to be done to improve the relationship between people of different races, religions and culture in Western Balkan economies

On a scale from 1 to 4, to what extent do you agree or disagree that each of the following ought to be done to improve the relationship between people of different races, religions and cultures in your economy? – Results by economies

- 1) Outlaw discrimination against minority groups. 2) Encourage the creation of organisations that bring people from different races, religions and cultures together. 3) Promote equality of opportunity in all areas of social life. 4) Promote understanding of different cultures and lifestyles in my economy. 5) Give a greater role to organisations which have already gained experience in the fight against racism. 6) Encourage the participation of people from these minority groups in the political life of my economy. 7) Encourage trade unions and churches/mosques to do more against racism/xenophobia.

(All respondents, N=6023, single answer, scale from 1 to 4, share of total, %)



Respondents across the Western Balkans show overwhelming support for multifaceted measures to improve inter-ethnic relations, signalling desire for greater social cohesion. This broad endorsement for collaboration across economies, civil society and faith lines reveals public awareness that diversity is an asset to nurture, not a threat. While prejudice persists in pockets, majority sentiment understands strengthening social bonds requires comprehensive efforts embracing empathy alongside equity.

There is an overwhelming consent, with no significant nuances, on measures to improve the relationship between people of different races, religions and cultures in the Western Balkan economies. Measures to improve

³⁰ Please see here: <https://blogs.worldbank.org/europeandcentralasia/western-balkans-heading-towards-another-storm>

³¹ Please see here: <https://balkaninsight.com/2023/04/06/in-transit-foreign-workers-use-albania-as-stopover-to-west/>

³² Please see here: <https://china-cee.eu/2023/03/29/north-macedonia-social-briefing-the-government-proposes-to-import-foreign-workers-to-address-labor-shortages/>

legislation, engage experienced organisations, trade unions, churches and mosques as well as to promote equal opportunities and common understanding, enjoy wide-spread support ranging between highest 80%+ in Albania to lowest 67%+ in North Macedonia. The least favoured policy, but still enjoying strong support, is encouragement of minority groups' participation in political life, with highest 73% of support in Albania and Bosnia and Herzegovina, to lowest 61% in Serbia.

Conclusions

Respondents of the Western Balkans are **not satisfied** with the way things are going in their region. More importantly, since 2021 the region is moving towards greater **dissatisfaction**. There is however slight optimism for the future of security in the region overall. Amongst the potential issues affecting perceptions of security in the region, respondents have identified the following three factors as most important: **crime, organised crime**, drugs and human trafficking, violence or vandalism (60%); **misuse of firearms** and arms trafficking (48%); and **possibility of an armed conflict** between ethnic groups or political instability in the WB region (47%). Concern over the "**misuse of firearms and arms trafficking**" has significantly risen. This concern is **universal** throughout the region.

A few new possible challenges to internal security were suggested for the first time in the 2023 survey: the probability of armed conflicts between ethnic groups or separatist political ideologies; and Islamophobia, anti-Semitism and other types of ethnic-based discrimination and ethnonationalism. In Albania and in particular in Kosovo* there are not many concerns about the probability of armed conflicts between ethnic groups or separatist political ideologies, and of Islamophobia, anti-Semitism and other types of ethnic based discrimination and ethnonationalism as challenges to internal security. In the other four economies, and in particular in North Macedonia, these are considered serious threats. **Respondents in North Macedonia** have in the highest percentages compared to the other Western Balkan residents, and voiced **concerns about various possible issues** as being threats to internal security (eight out of nine other possible security threats).

Economy-wise, respondents in North Macedonia, Bosnia and Herzegovina, and Serbia hold views that in the next three years the likelihood of different challenges to security will **increase**. Respondents in Albania and Montenegro have mixed feelings about future security challenges. Respondents in **Kosovo*** are great outliers because they hold views that in the next three years the **likelihood** of all different challenges to security will **decrease**.

While minorities remain a sensitive issue, data reveal complex, nuanced attitudes across the region. Overall, majorities reject perceiving minorities as security threats or sources of insecurity. Yet sizable minorities still hold such sceptical views, warranting attention.

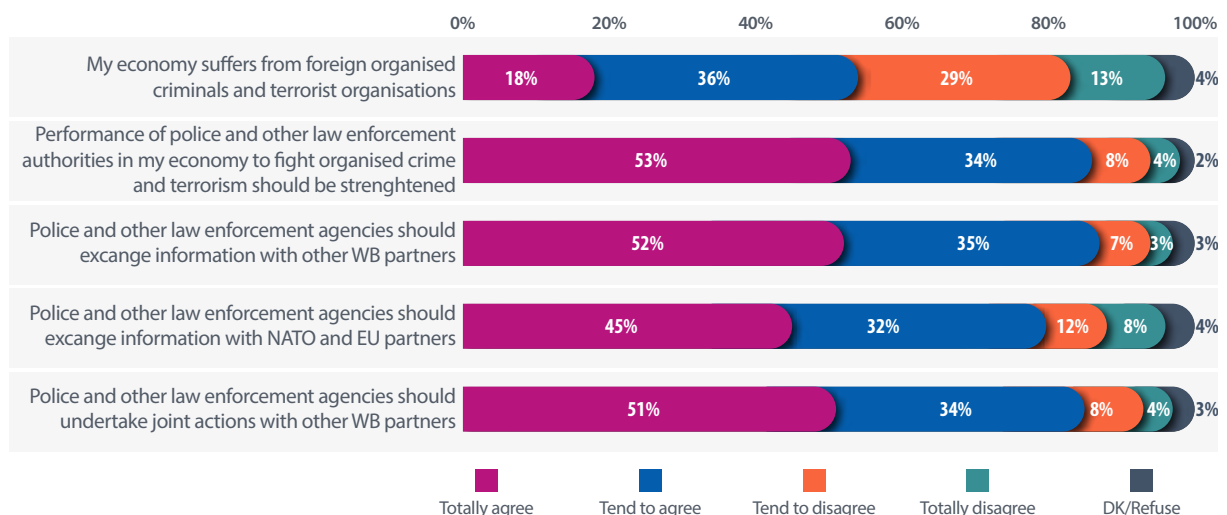
B. Perception of the fight against terrorism, organised crime and border/boundary security

As noted in the previous chapters, crime/organised crime impacts most negatively the sense of security for respondents. Across the region, 60% list crime the first in a list of elements that negatively impact security in their economy. However, this overall percentage is slightly misleading as in most economies, with the notable exception of Kosovo*, this figure is north of 70%. Kosovo* constitutes a curious outlier as only 15% think crime currently negatively impacts their security perception in the economy. This is consistent with the 2022 survey as well, where fewer respondents in Kosovo* saw crime as a concern, compared to counterparts in other economies, even though it should be noted that it was still 50% higher than in 2023. Perhaps the presence of international and EU security actors in the economy may contribute to these findings for Kosovo*.

Respondents of the region overwhelmingly agree that the **performance of the police** and other law enforcement authorities in their economies to fight organised crime and terrorism **should be strengthened**. Support is strong in the region as a whole with 87% totally or tending to agree, ranging from 94% in Albania to 75% in Kosovo*. Moreover, respondents of the region believe **cooperation in the region is good** and should be encouraged. Answering the question if police and other law enforcement agencies should exchange information with other WB partners, an overwhelming majority agree (87% for the region as a whole, from highest 97% in Albania to the lowest 83% in North Macedonia). Moreover, respondents of the Western Balkans support police and other law enforcement agencies to undertake joint actions with other WB partners (85% for the region as a whole, from highest 97% in Albania to the lowest 83% in North Macedonia). This shows that there are areas of cooperation amongst the economies that enjoy strong support of constituencies as it would address security concerns that are prevalent and similar in all economies of the region and it could be an entry point to encourage closer coordination and collaboration amongst officials.

Figure 10. Opinion on the phenomena from which the economies are suffering
I will read you several statements. To what extent do you agree or disagree with each of them?
– Results for the Western Balkans region

(All respondents, N=6023, single answer, scale from 1 to 4, share of total, %)



In Serbia, cooperation with NATO and the EU is perceived as good, though reluctantly. Thus, answering the question of whether police and other law enforcement agencies should exchange information with other NATO and EU partners, 63% of respondents in Serbia agree or tend to agree, which is relatively high considering that only 33% of respondents in Serbia support EU enlargement and that opinions of NATO are not so positive.

The support is higher in all the other economies (77% in the region as a whole, 98% in Albania, 73% in Kosovo*, 71% in Bosnia and Herzegovina, 70% in North Macedonia and 78% in Montenegro).

The majority of respondents of the region believe that their economy suffers from **foreign organised criminals and terrorist organisations**. The difference between the ones that totally agree and tend to agree versus those who totally disagree and tend to disagree for the region as a whole is 12% (54-42). However, there are **regional differences**. Respondents in Albania and Kosovo* tend to disagree with this statement (42-55% and 41-58%, respectively). Respondents in Serbia, Bosnia and Herzegovina, and Montenegro strongly agree (63-32%, 63-32% and 60-33%), while respondents in North Macedonia agree but not as strongly (57-38%).

Figure 11. Beliefs if the economy suffers from foreign organised criminals and terrorist organisations

I will read you several statements. To what extent do you agree or disagree with each of them? – Results by economies

1) My economy suffers from foreign organised criminals and terrorist organisations. 2) Performance of the police and other law enforcement authorities in my economy to fight organised crime and terrorism should be strengthened. 3) Police and other law enforcement agencies should exchange information with other WB partners. 4) Police and other law enforcement agencies should exchange information with other NATO and EU partners. 5) Police and other law enforcement agencies should undertake joint actions with other WB partners.

(All respondents, N=6023, single answer, scale from 1 to 4, share of total, %)

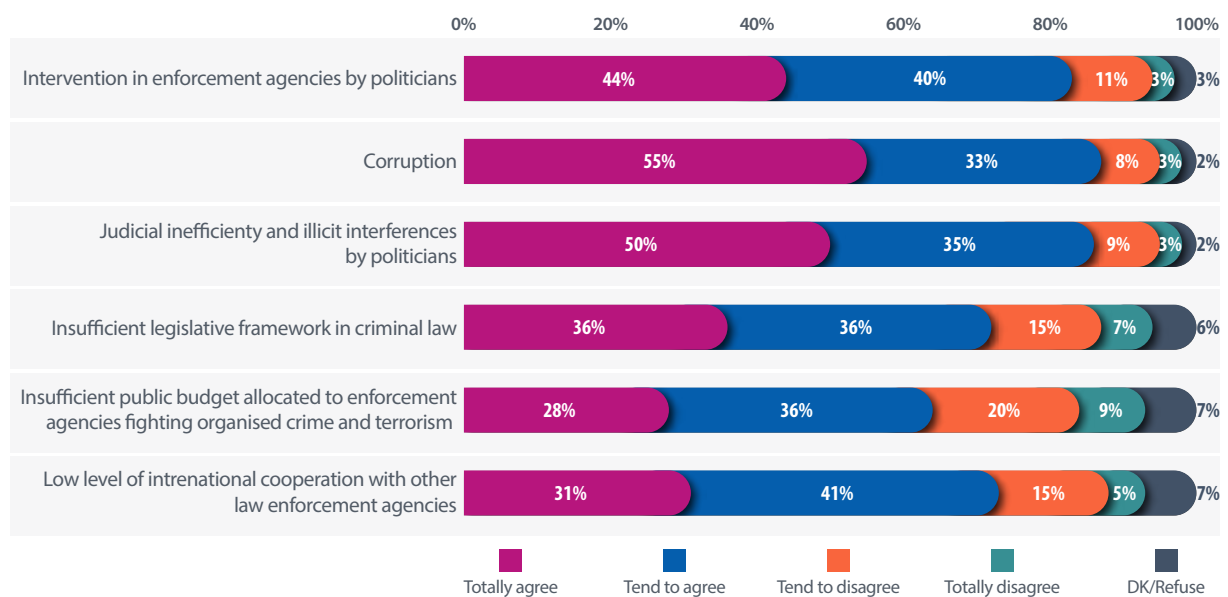


Corruption is perceived as the biggest obstacle in the fight against organised crime and terrorism, closely followed by political interference and inefficiency of the judiciary. As corruption can sometimes be considered a catch-all, it is possible that respondents see these three as inter-connected. It seems respondents believe there are good legislative frameworks in place, which is a mantra often repeated in all economies that the challenges lie in implementation of already good legal frameworks. Interestingly, while more than half of the respondents believe insufficient public budget allocated to the fight against organised crime is an obstacle, this is the lowest amongst the other options listed. This may echo concerns that allocated budgets are sufficient, but misused due to corruption, which is considered an obstacle by the vast majority of respondents (84%).

Figure 12. How to fight effectively organised crime and terrorism

To what extent do you agree or disagree that the following reasons are the main obstacles to fight organised crime and terrorism effectively in your economy? – Results for the Western Balkans region

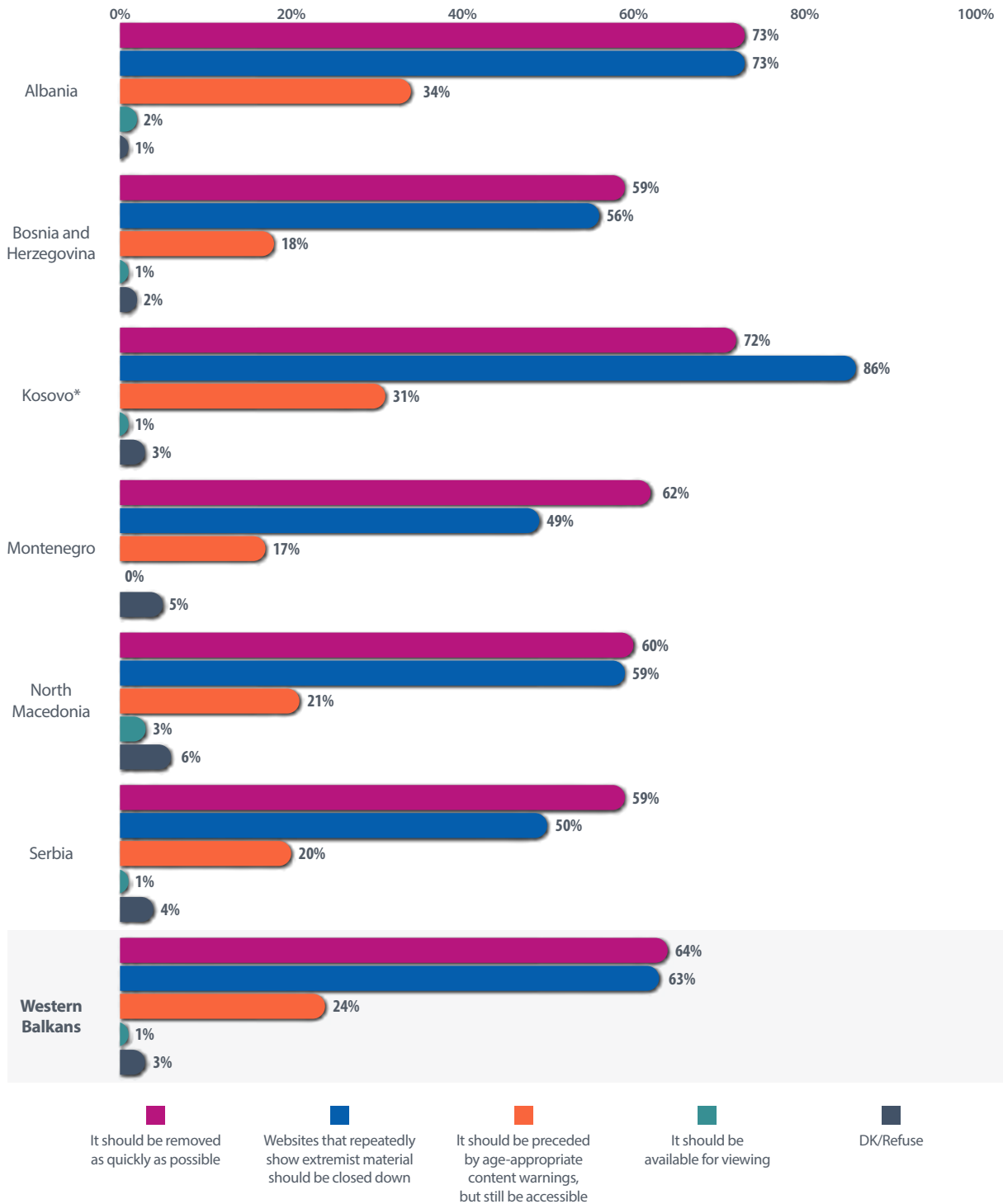
(All respondents, N=6023, single answer, scale from 1 to 4, share of total, %)



About one in two respondents in the region agrees that their economy should allow individuals returning from foreign war zones, with the highest acceptance amongst the respondents in Albania and the lowest amongst those in North Macedonia. It should be noted though that these responses may be slightly diluted due to the inclusion of Ukraine amongst the list of territories foreign fighters might be coming back from, which in many citizens' minds is a just war that is unrelated to terrorism. This may have impacted the higher-than-expected percentages of those who would welcome a decision to accept the return of foreign fighters. No comparison can be made with previous iterations of the survey as this question was not included in earlier questionnaires.

Figure 13. Preferred Methods for Handling Radical/Extremist Material on the Internet in Each Western Balkan Economy
 What do you think is the best way in which radical/extremist material should be handled on the internet?

(All respondents, N=6023, multiple answers, share of total, %)

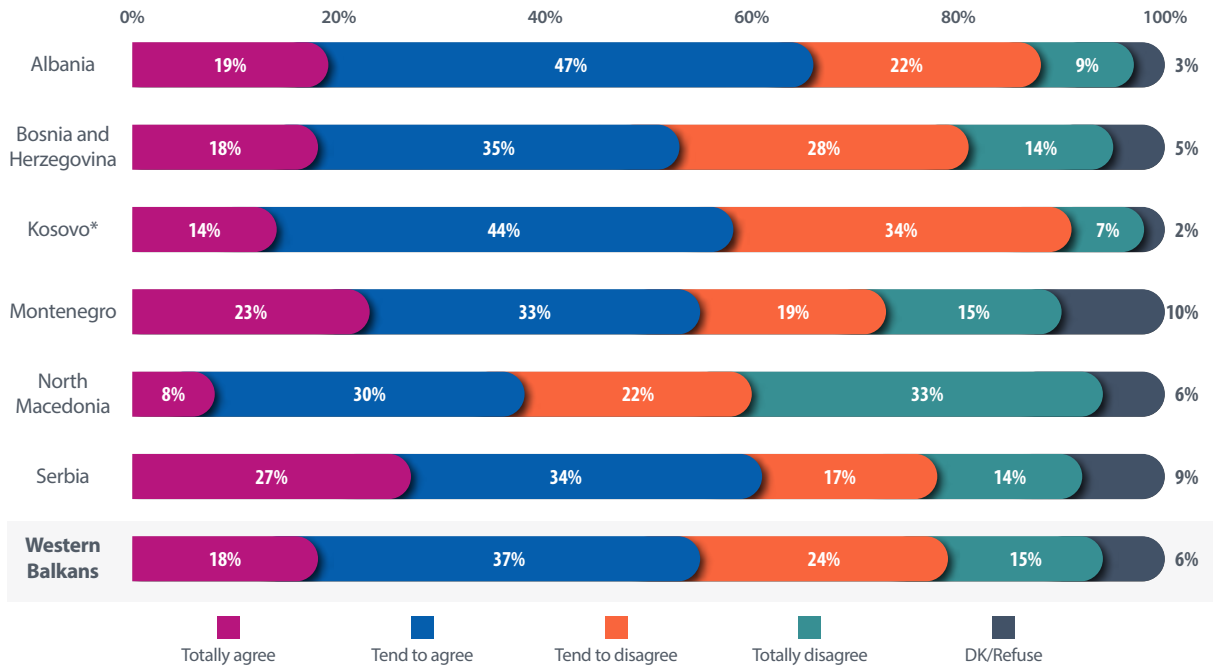


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Figure 14. Agree or disagree on individuals and their families engaged in foreign war zones returned to their local communities

Your economy decided to allow the return of individuals and their families engaged in foreign war zones such as Afghanistan, Syria, Iraq and Ukraine to their country of origin, applying the law accordingly. To what extent do you agree or disagree with this decision?

(All respondents, N=6023, single answer, scale from 1 to 4, share of total, %)

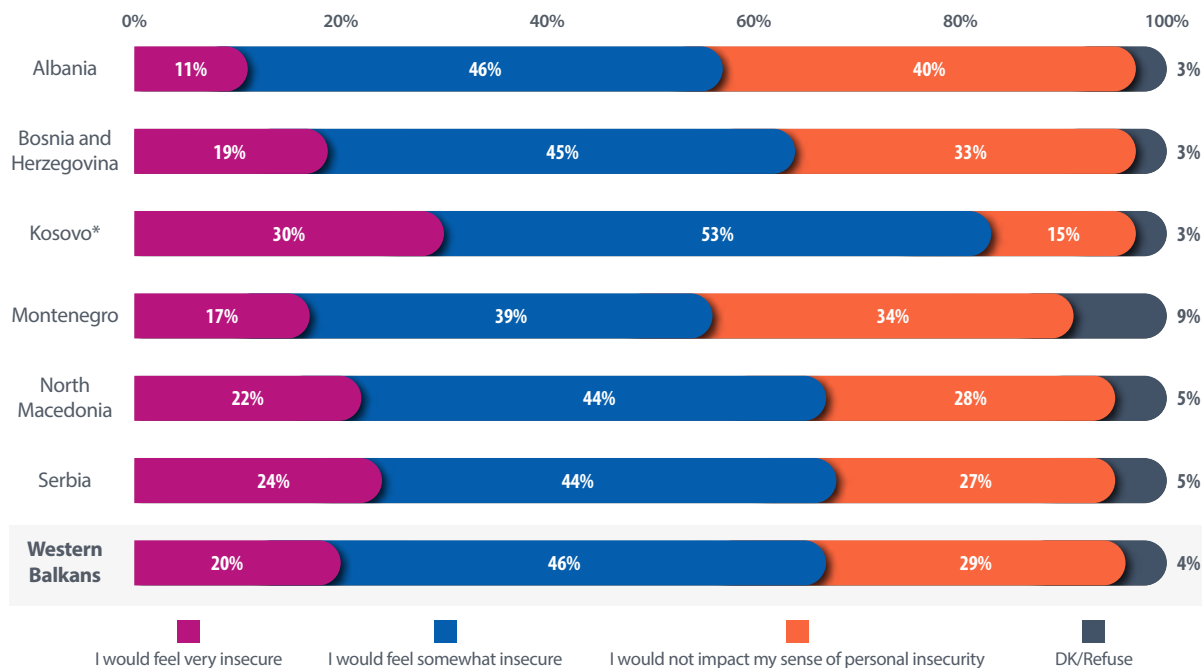


Despite being relatively welcoming of foreign fighters, respondents in the Western Balkans do not feel personally secure if individuals and their families engaged in foreign war zones returned to their local communities. The respondents who said that they would feel very insecure or somewhat insecure across the region is overwhelming. The percentages go from 66% across the region, to the highest 83% in Kosovo* and the lowest 57% in Albania. This is an increase from the 2022 survey where 58% responded said they would feel unsafe. In Kosovo* 10% fewer respondents said they would feel insecure in 2022 compared to 2023 while the trend in Albania has remained unchanged.

Figure 15. Sense of personal security if the individuals and their families engaged in foreign zones returned to their local communities

How would your sense of personal security be if the individuals and their families engaged in foreign war zones returned to their local communities?

(All respondents, N=6023, single answer, share of total, %)



Conclusion

Crime, organised crime, drugs and human trafficking, violence or vandalism is the most negative impact to respondents' sense of security across all economies, with the exception of Kosovo*. Corruption, political influence and inefficient judiciary are the most acute perceived obstacles to fighting organised crime and terrorism effectively. Similar opinions of the Western Balkan respondents are given in the chapter on corruption. Overall, there is concern with the implementation of the rule of law, the level of democratic reforms, and problematic linkages between politics and illicit activities.

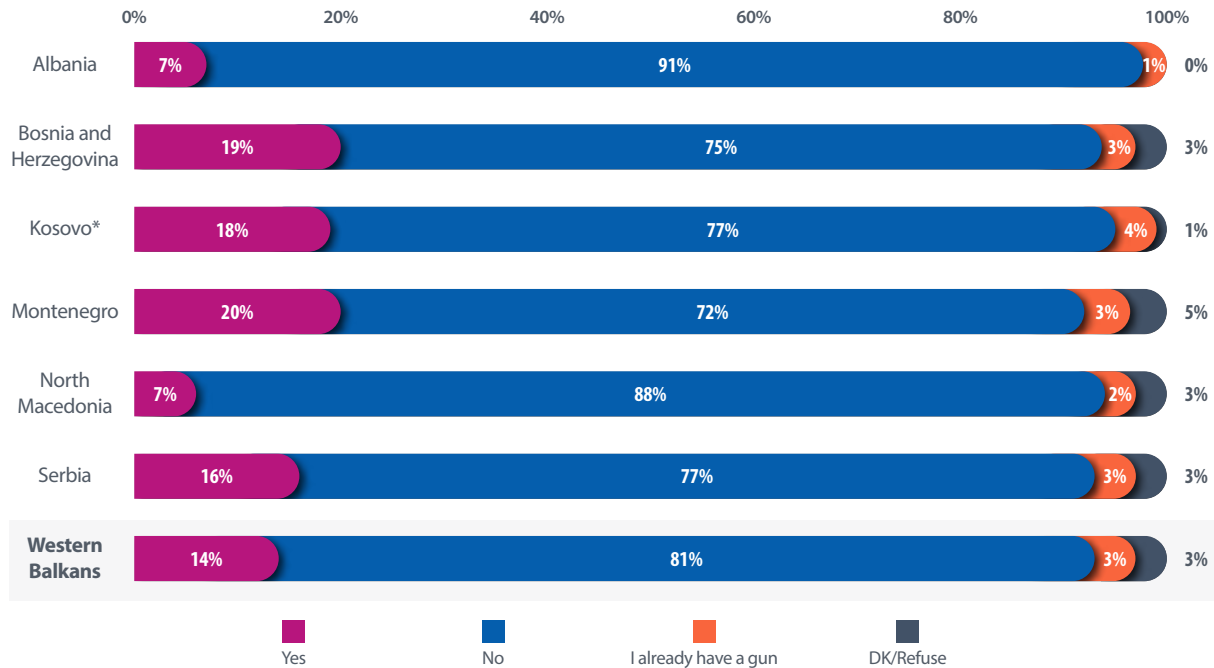
One possible way to move forward regarding the fight against organised crime is increased regional and cooperation with the international community. Namely, respondents from the region overwhelmingly agree that the **performance of the police** and other law enforcement authorities in their economies to fight organised crime and terrorism **should be strengthened** and **that cooperation in the region is good** and should be encouraged. Moreover, respondents of the Western Balkans support police and other law enforcement agencies to undertake joint actions with other WB partners. **Cooperation with NATO and EU** is perceived as good, even if a bit less eagerly in Serbia.

C. Perceptions on gun ownership and fighting illicit possession, trafficking and misuse of SALW

Figure 16. Consideration on owning a gun

Would you consider owning a gun?

(All respondents, N=6023, single answer, share of total, %)

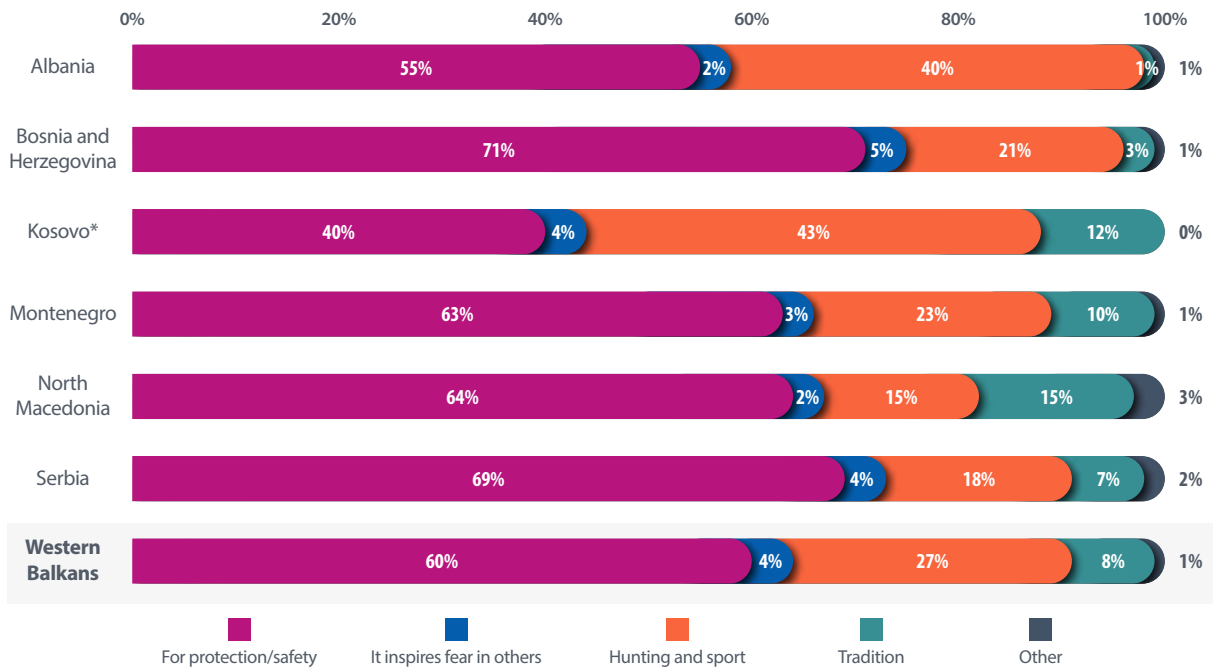


Based on the survey results, the overwhelming majority of respondents (81%) in the region would not consider owning a gun. Still, 14% of respondents said they would consider owning a gun. The lowest share of those who would consider owning a gun was documented in Albania and North Macedonia at 7%, while in the rest of the region, similar trends were identified, with 16% in Serbia, 18% in Kosovo, 19% in Bosnia and Herzegovina and 20% in Montenegro.

Figure 17. Primary Reasons for Gun Ownership in the Western Balkans

What would be / is the main reason for you to own a gun?

(Respondents with answer "Yes" and "I already have a gun" at Q24, N=1019, single answer, share of total, %)



Conclusion

Trends indicating a rise in the number of respondents who said they would own a gun was documented in most economies. In addition, in the Western Balkans region, there is a noticeable rise in the significance of personal safety and protection as a driving factor behind gun ownership, indicating an increasing sense of concern amongst residents. When analysing individual economies, distinct variations emerge in the primary motives for gun ownership and the perception of threats.

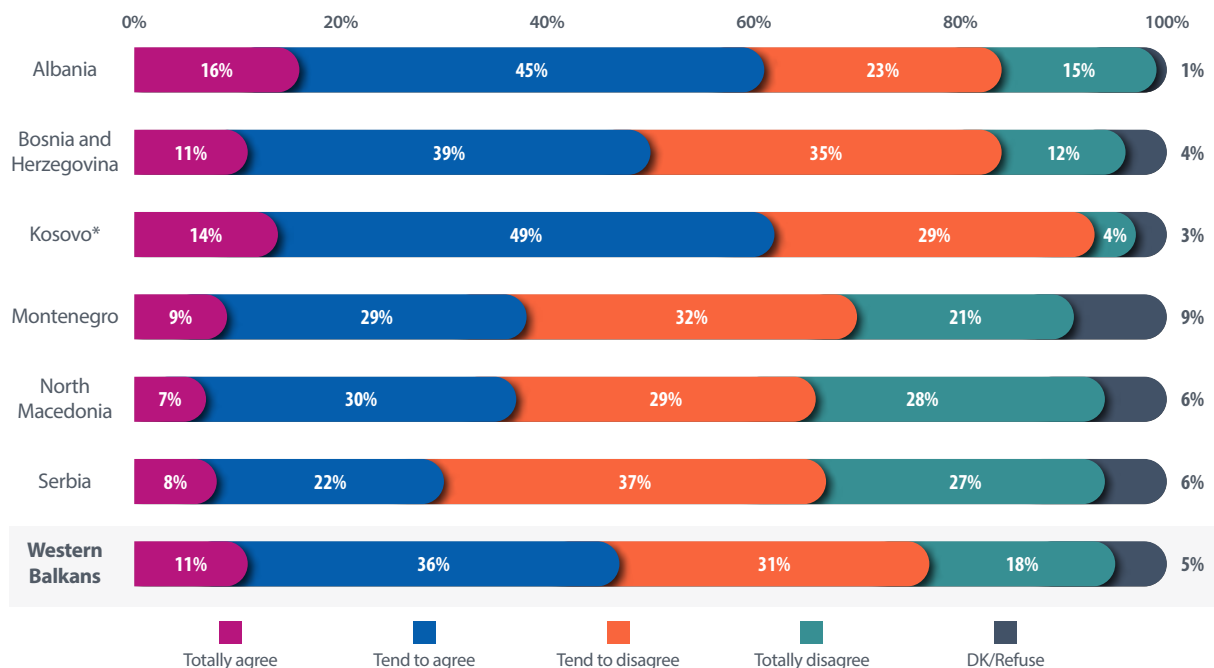
D. Perceptions of irregular immigration, asylum-seeking and humanitarian dimension of migratory movements that can help measure sentiments of people but also responsiveness of the institutions

The Western Balkans confronts critical choices on migration amid persistent unease. Across the region labour shortages driven by emigration and aging have reached distressing levels. Across economies (like Albania and North Macedonia), policy-makers are looking outwards to fill the gaps in internal labour markets, especially for low skilled labour. In addition, 2022 saw the highest number of irregular migrants crossing in the region. According to Frontex, there were 145,600 irregular border/boundary crossings reported on the Western Balkans route, 136% more than in 2021.³³ This is the highest number reported since 2015. Therefore, there is heightened coverage, attention, and public discourse on these issues in the region, compared to previous years, however there are perpetual misconceptions and poor media coverage of these issues that are often not based on facts.

Figure 18. Opinion on labour migration from other economies

Do you agree or disagree that fundamental rights and freedoms have been restricted in your economy for reasons related to the fight against terrorism and organised crime?

(All respondents, N=6023, single answer, scale from 1 to 4, share of total, %)



Labour shortages driven by emigration and aging are increasing across the Western Balkans³⁴, yet attitudes on addressing gaps through foreign workers diverge. Regionally, 47% believe encouraging labour migration could fill the needs in certain sectors. However, support ranges from just 29% in Serbia to 63% in Kosovo*.

Kosovo* stands out with the highest support, as 63% of respondents are in favour of labour migration, while Serbia has the lowest support, with 64% of respondents opposing this view. The split stance reflects differing

³³ EU's external borders in 2022: Number of irregular border crossings highest since 2016 (europa.eu)

³⁴ Eurostat. Enlargement countries - statistics on migration, residence permits, citizenship and asylum.

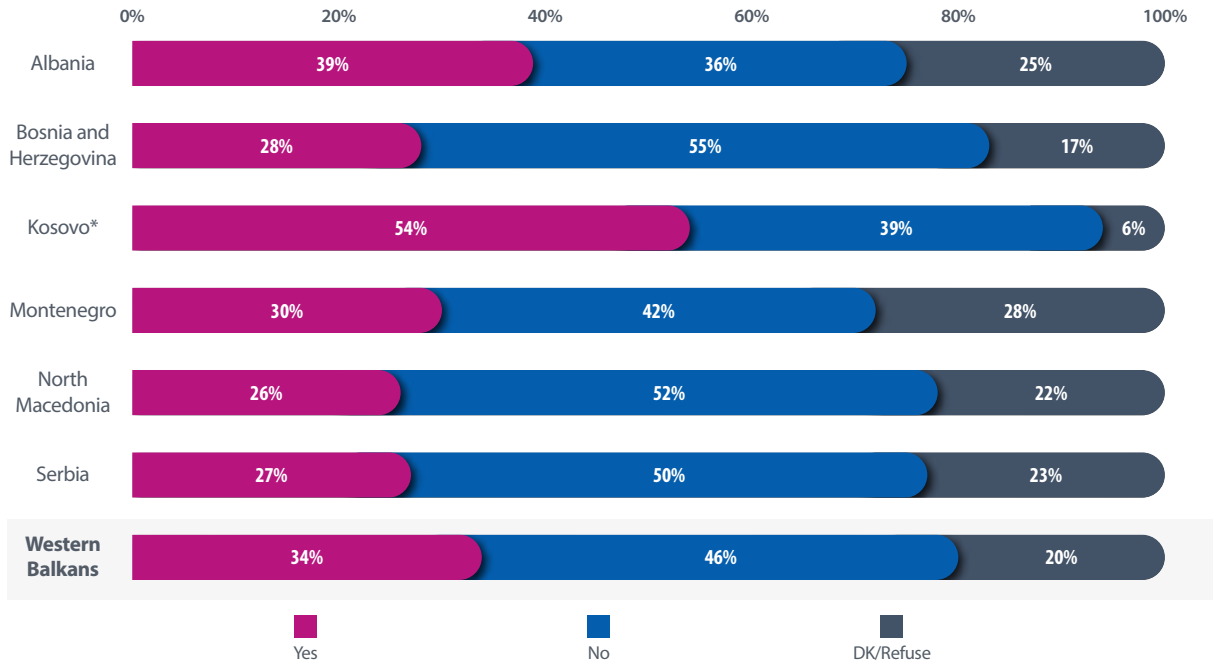
Online: https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Enlargement_countries_-_statistics_on_migration,_residence_permits,_citizenship_and_asylum#Population_change:_natural_change_and_net_migration

experiences with migration and perceptions of its impacts. Economies like Kosovo* and Albania with high emigration may view foreign labourers as necessary to fill acute workforce gaps. But elsewhere, publics worry importing workers could displace jobs or create cultural frictions. Scepticism in Serbia and Montenegro underscores migration’s potential to create anxieties even where shortages persist.

Figure 19. Discussion about immigration in Western Balkan economy

Would you say that discussion about immigration in your economy is based on facts and reliable data?

(All respondents, N=6023, single answer, share of total, %)



Across the Western Balkans, citizens overwhelmingly view public discourse on immigration as lacking factual grounding, revealing concerns over data gaps and misinformation. Regionally, only 34% believe discussions are based on reliable data, while 46% disagree. In only two economies, Albania and Kosovo*, respondents who trust the discussion about immigration outweigh those who oppose it, with Kosovo* recording the highest rate at 54% and Albania at 39%.

Divergent attitudes mirror differing experiences with immigration across economies. In Kosovo* and Albania which face acute labour shortages, majorities trust the debate, likely reflecting visible foreign worker influxes. However, elsewhere, especially Serbia, Montenegro and North Macedonia which oppose importing labour, most believe immigration talk is unfounded.

Limited visibility of immigration may also foster doubts over facts. Unlike the EU, immigration remains a peripheral issue in Balkan politics and media. With the topic largely silent, misperceptions likely persist.

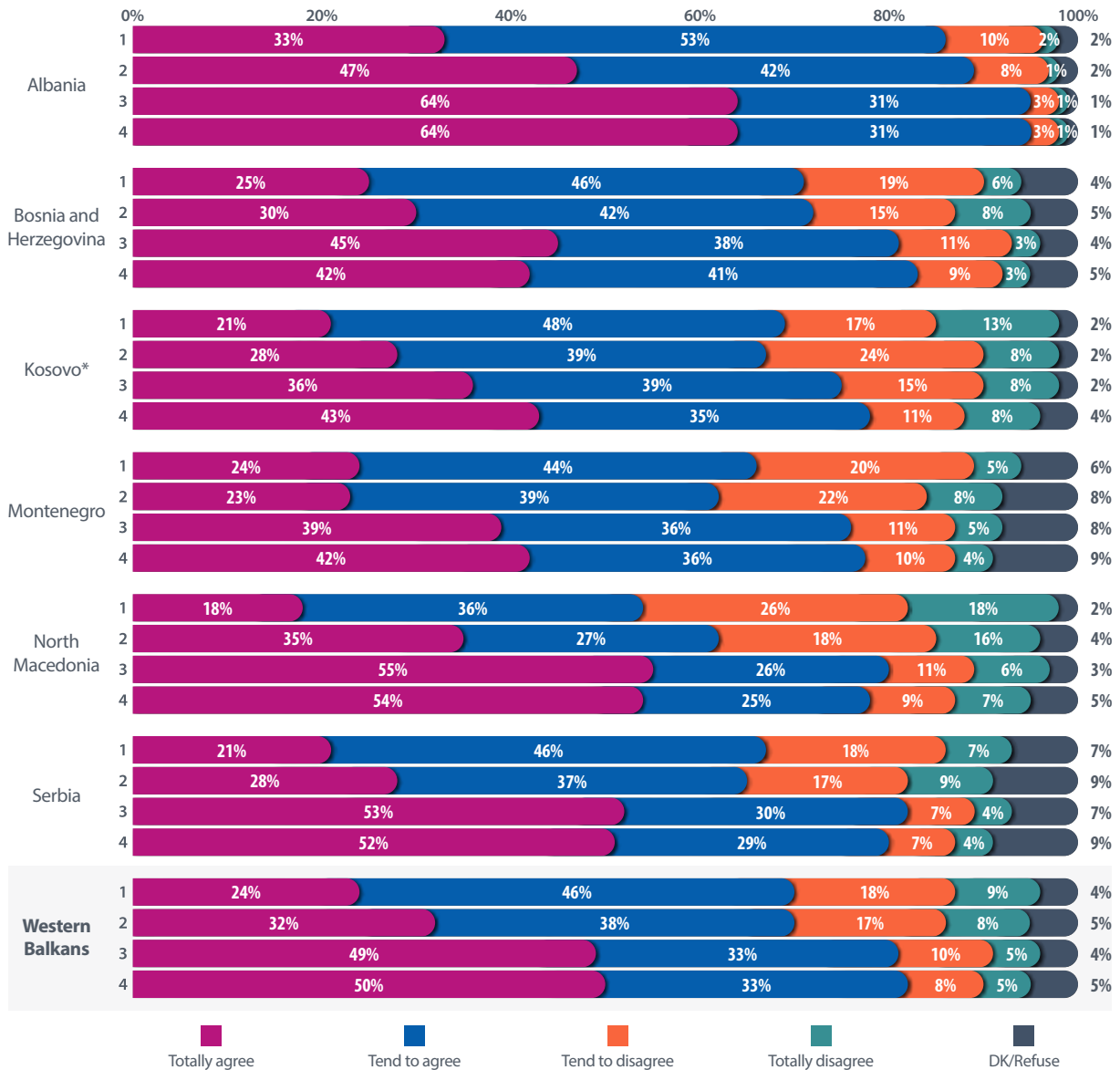
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Figure 20. Statements on Public Security

To what extent do you agree or disagree with each of the following statements about public security in the following 12 months?

1) My economy should offer protection and asylum to people in need. 2) Across the WB region the rules for admitting asylum seekers should be the same as those in the EU. 3) The EU Member States should accept more asylum seekers (per capita) than my economy and WB region. 4) The costs of my economy providing asylum should be shared by the EU Member States.

(All respondents, N=6023, single answer, scale from 1 to 4, share of total, %)



Despite limited resources, public attitudes across the Western Balkans lean positive towards providing protection and asylum to immigrants, paired with expectations for EU support. Regionally, 70% agree their economies should shelter those needing protection, complying with the same EU rules, and more than 80% want EU member states to accept more refugees and share the burden.

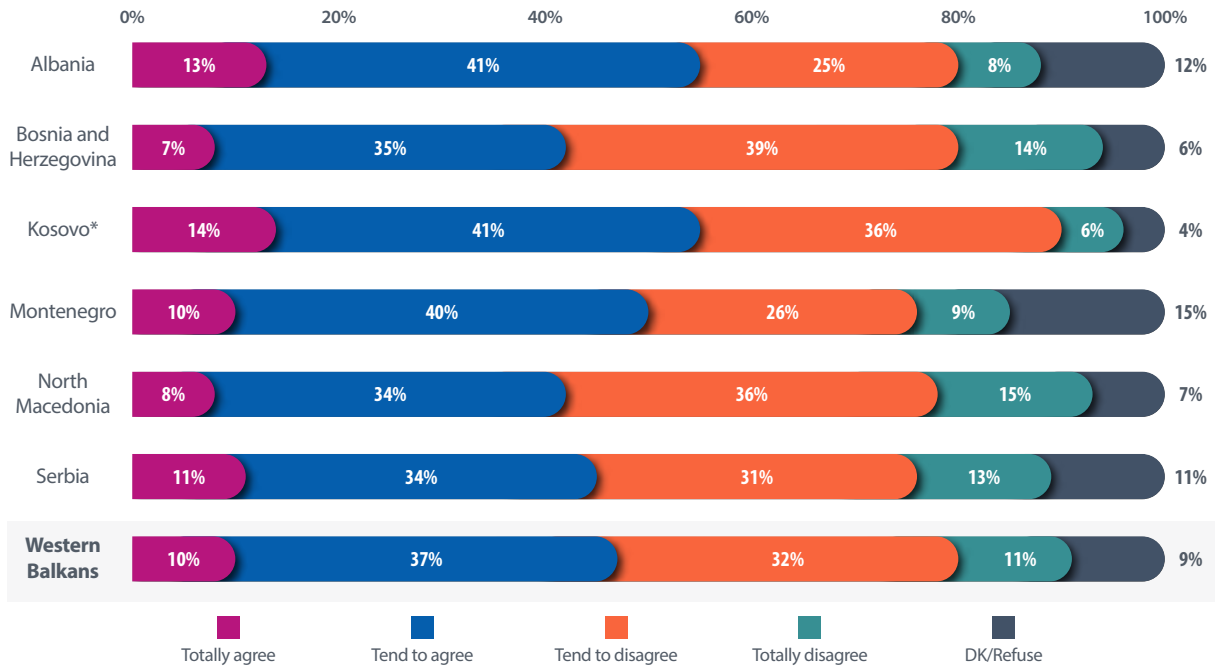
Backing of asylum seekers is highest in Albania at 86%, likely reflecting empathy for the many Albanian asylum seekers abroad. Bosnia and Herzegovina (71%), Kosovo* (69%), Montenegro (68%), and Serbia (67%) follow, while North Macedonia shows lowest support at 54%, indicative of a more reluctant attitude towards immigrants compared to other economies.

Albania by and large thinks that EU should accept more asylum seekers and share the burden of their economy (95%), closely followed by Bosnia and Herzegovina (83%, 83%), Serbia (83%, 81%), North Macedonia (81%, 79%), and Montenegro and Kosovo*, both have majorities of 75% and 78% for each policy.

Figure 21. Current level of border/boundary procedures

To what extent do you agree or disagree that the current level of border/boundary procedures of your economy and their enforcement in terms of managing immigration are sufficient?

(All respondents, N=6023, single answer, share of total, %)



Opinions on the sufficiency of border/boundary controls for managing immigration remain sharply divided across the Western Balkans, reflecting differing experiences. While there has been a slight improvement of 1 point from last year, 47% believe current border/boundary procedures are adequate, while 43% disagree. But views range from only 39% satisfied of border/boundary regime in Bosnia and Herzegovina to 55% in Kosovo*.

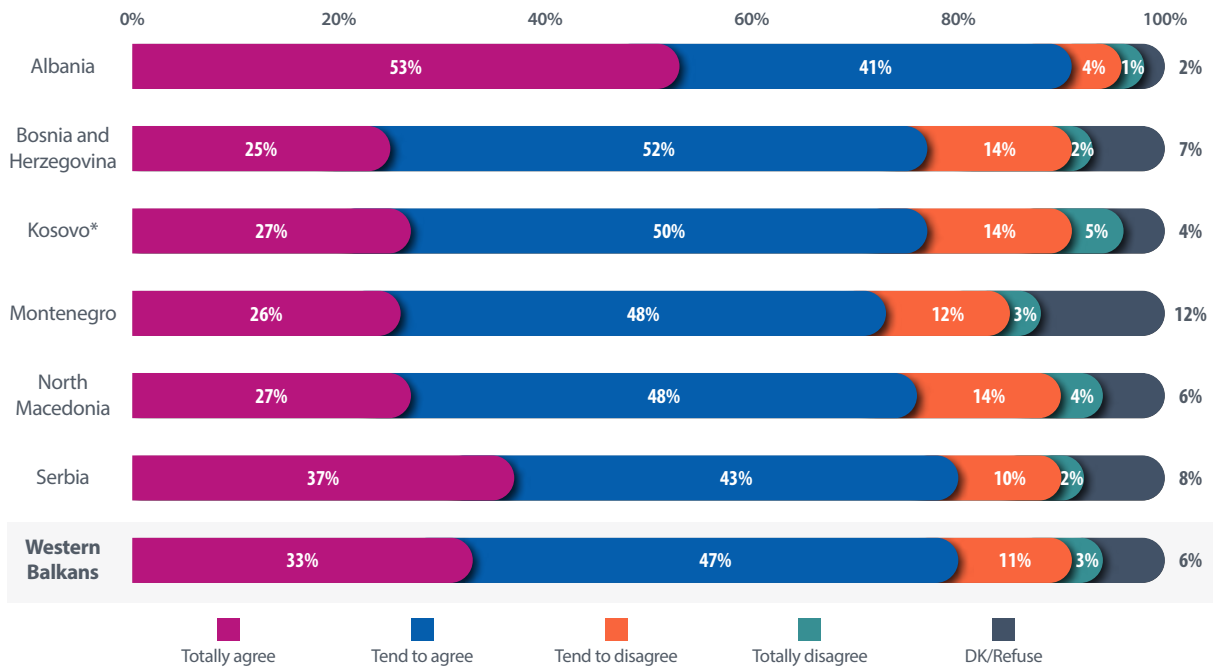
There are more substantial variations at economy level. Serbia remains evenly divided, with 45% agreeing, and 44% disagreeing with the current level of enforcement. Bosnia and Herzegovina and North Macedonia have 53% and 51% of respondents who believe that border/boundary regime should be strengthened, while Albania, Kosovo* and Montenegro have an agreement of 50% and above about the sufficiency of current border/boundary regime.

Notably, Bosnia and Herzegovina and Kosovo* have undergone significant changes in opposite directions. There has been a sharp increase in the percentage of respondents satisfied with the level of border/boundary procedures in Bosnia and Herzegovina, rising from 19% to 42%. Conversely, Kosovo* has experienced a large contraction, dropping from 80% to 55% of respondents satisfied with current border/boundary regime. Divergence likely stems from proximity to major transit routes. Shifting attitudes also underscore the issue's fluidity - satisfaction jumped in Bosnia and Herzegovina but plunged in Kosovo* since 2021.

Figure 22. Agreement or disagreement on regional contingency plan

To what extent do you agree or disagree that a regional contingency plan could better manage immigration and strengthen border/boundary management in your economy?

(All respondents, N=6023, single answer, share of total, %)

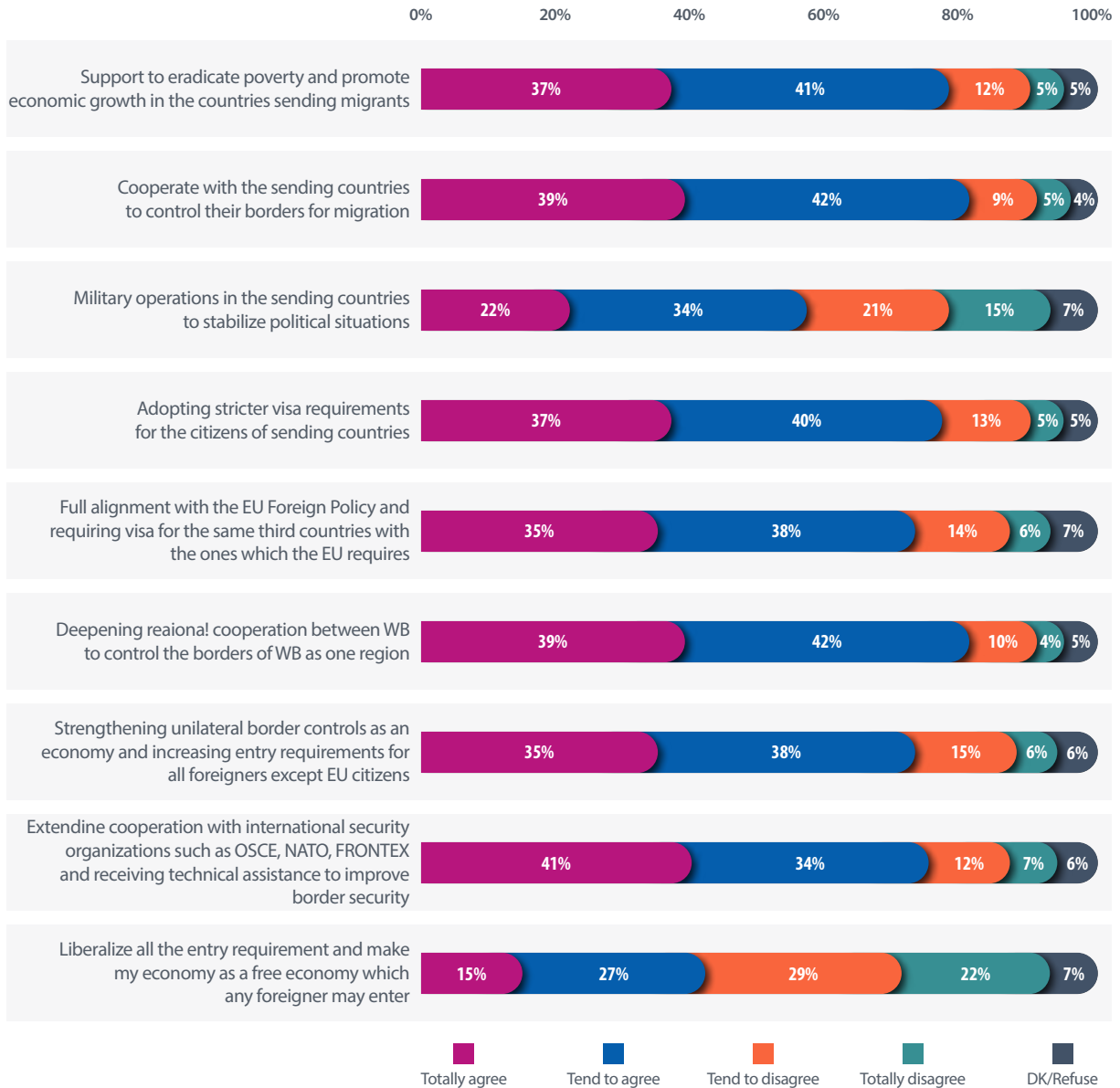


Citizens across the Western Balkans overwhelmingly back a joint regional contingency plan to enhance collective management of immigration. Regionally, 80% supports such an initiative, up sharply from 43% in 2021. Albania shows particularly high enthusiasm at 94%, followed by Serbia at 80%, Kosovo* at 77%, Bosnia and Herzegovina, North Macedonia at 75%, and Montenegro at 74%. This remarkable consensus demonstrates growing public awareness that effectively governing migration requires coordinated cross-border/boundary actions, not unilateral responses. With support aligning between societies ahead of politics, a historic opportunity exists to strengthen Western Balkans cooperation.

Figure 23. Opinion on management of irregular immigration

Irregular migration means movement of persons to a new place of residence or transit that takes place outside the regulatory norms of the sending, transit and receiving economies. To what extent do you agree or disagree with each of the following statements related to managing irregular migration? – Results for the Western Balkans region

(All respondents, N=6023, single answer, scale from 1 to 4, share of total, %)



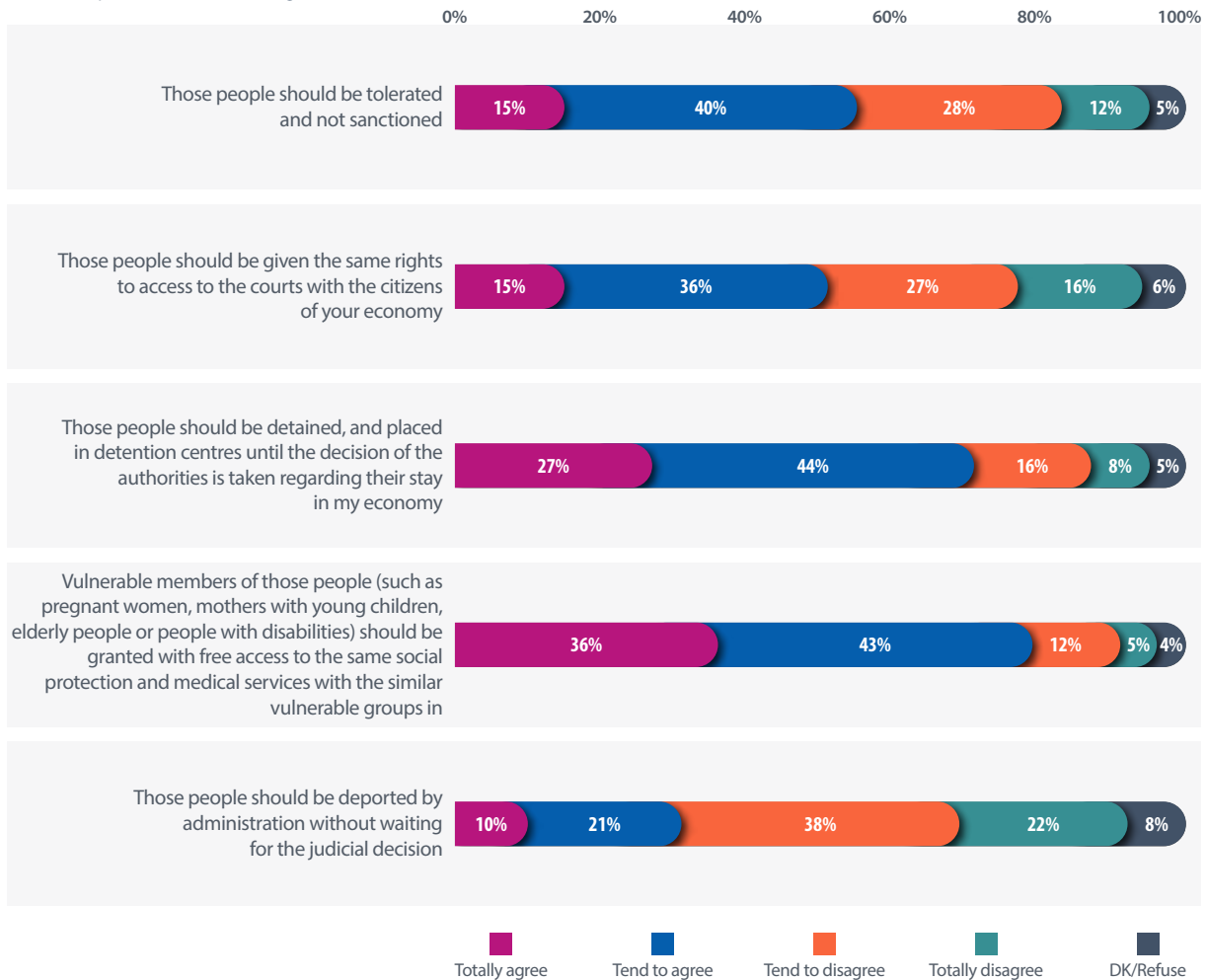
Deepening regional cooperation as one region has overwhelmingly strong support, spiking 89% in Albania, followed by 82% in North Macedonia, 81% in Serbia, 79% in Bosnia and Herzegovina and Kosovo*, to 74% in Montenegro. Cooperation with international security organisations received solid majority backings, at 97% in Albania, 74% in Bosnia and Herzegovina, 69% in Kosovo* and Montenegro, 79% in North Macedonia and 62% in Serbia.

Figure 24. Opinion regarding foreigners who did not commit any criminal offense except the violation of migration regulation

To what extent do you agree or disagree with the following statements regarding foreigners who did not commit any criminal offences except the violation of migration regulations of your economy due to the fact that they crossed borders/boundaries without permission and are not able to present legitimised documents (such as passports, etc.).

– Results for the Western Balkans region

(All respondents, N=6023, single answer, scale from 1 to 4, share of total, %)



The progressive shift in public empathy towards migrants is manifesting in support for more humanitarian treatment and access to services. A clear majority (55%) favours leniency for undocumented migrants' absent criminal behaviour. Support for tolerance has risen sharply from 28% in 2021 to 55% today. This shift indicates an evolution in attitudes as migrants have increasingly become a familiar presence in the region. As public exposure and contacts have grown, fears and prejudices have softened to some degree, giving rise to greater compassion.

However, support for accommodating migrant needs remains conditional on upholding law and order as evidenced by high backing for detention centres at 71%. This is a notable increase compared to previous year's data, which showed a 53% support.

An overwhelming majority (79%) in the region now favours free access to social welfare and healthcare for vulnerable migrants, soaring from just 30% last year. This increase holds uniformly across economies. This near universal support indicates an ethic of basic humanitarianism across societies. While respondents condition

approval of migrants' larger presence on security grounds, they embrace providing relief for particularly vulnerable groups, reflecting a moral obligation to meet essential needs.

Still, 60% oppose administratively deporting migrants without judicial review. Comparatively, support for deportation shrunk from 39% to 31%, signalling growing tolerance. This contradiction hints at an emerging awareness to grant due process even for irregular migrants. Respondents support secure containment of migrants in centres but insist deportation decisions adhere to democratic norms.

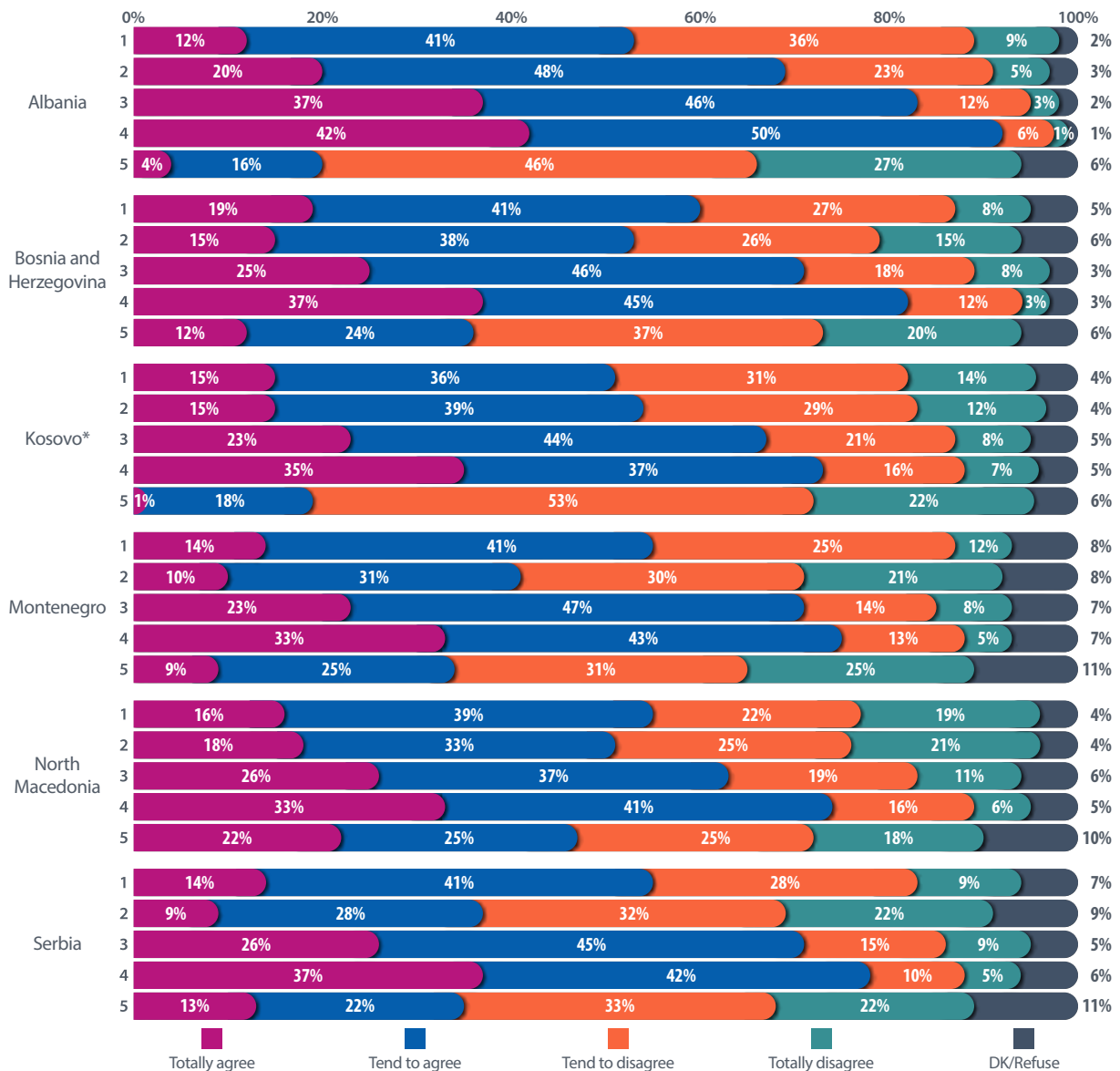
Figure 25. Opinion regarding foreigners who have not committed any criminal offense except violation of economic migration rules

To what extent do you agree or disagree with the following statements regarding foreigners who did not commit any criminal offences except the violation of migration regulations of your economy due to the fact that they crossed borders/boundaries without permission and are not able to present legitimised documents (such as passports, etc.).

– Results by economies

1) Those people should be tolerated and not sanctioned. 2) Those people should be given the same rights to access the courts as the citizens of your economy. 3) Those people should be detained, and placed in detention centres until the decision of the authorities is taken regarding their stay in my economy. 4) Vulnerable members of those people (such as pregnant women, mothers with young children, elderly people or people with disabilities) should be granted free access to the same social protection and medical services as those of vulnerable groups in my economy who are citizens or legal residents. 5) Those people should be deported by administration without waiting for the judicial decision.

(All respondents, N=6023, single answer, scale from 1 to 4, share of total, %)



Serbia witnessed the most dramatic attitude adjustment towards migrants, with tolerance levels nearly quadrupling from 15% to 55%. While positive trends emerged across the region, Albania saw a countervailing drop from 61% to 53% tolerance. Albania exhibits the highest support to offering migrants same rights access to courts, with 68% of respondents in agreement, followed by Kosovo* 54%, and North Macedonia 51%. Despite the incremental trend in Montenegro and Serbia, still the majority of respondents, 51% and 54% respectively, oppose this policy. Compared to last year, Serbia has the most significant contraction, from 70% in favour of deportation down to 35%.

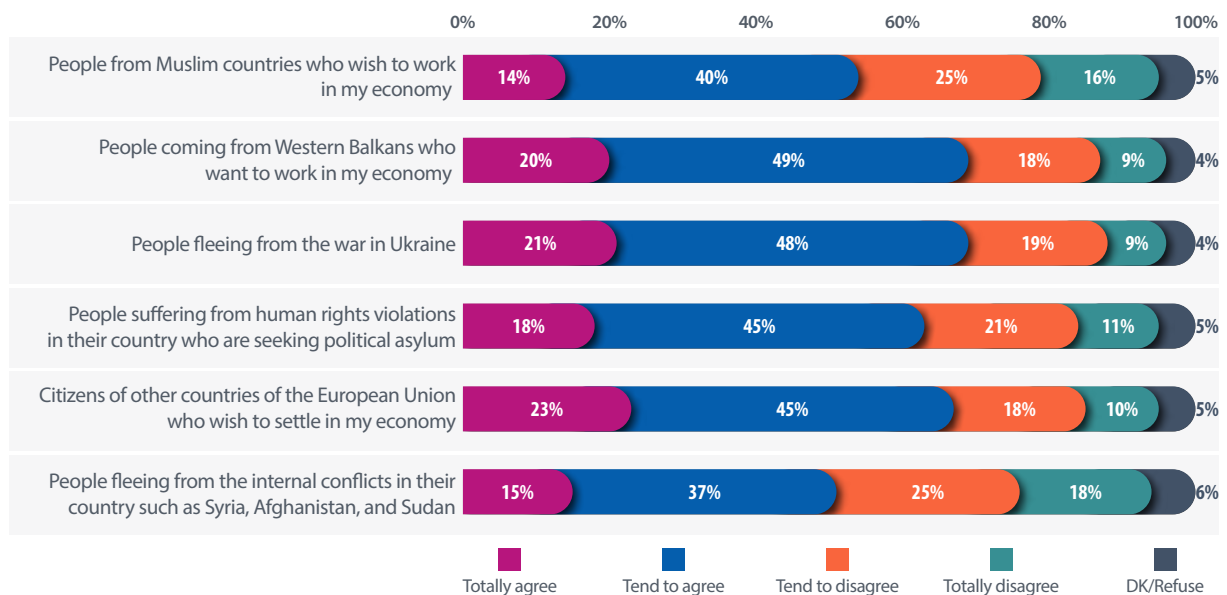
Regarding detention centres, the biggest change of opinion has been observed in Albania and Montenegro, where the majority now supports their establishment. Last year only 2 of 10 respondents in Albania were in favour of detention, while this year, 8 in 10 agree. Similarly, in Montenegro only 3 in 10 respondents supported detention centres, while this year 7 in 10 agree to such policy. This drastic change may be explained by the fact that growing economic insecurities inevitably affect response to accommodating and catering irregular migrants to hotels at economy cost."

Figure 26. Which group of emigrants should be accepted in your economy?

To what extent do you agree or disagree that the following groups of immigrants should be accepted by your economy.

– Results for the Western Balkans region

(All respondents, N=6023, single answer, scale from 1 to 4, share of total, %)



Overall, Western Balkan economies exhibit welcoming attitudes towards immigrants, though acceptance varies by migrant origin. Solid majorities support those fleeing war in Ukraine (69%), intra-regional migrants (69%), and EU citizens (68%).

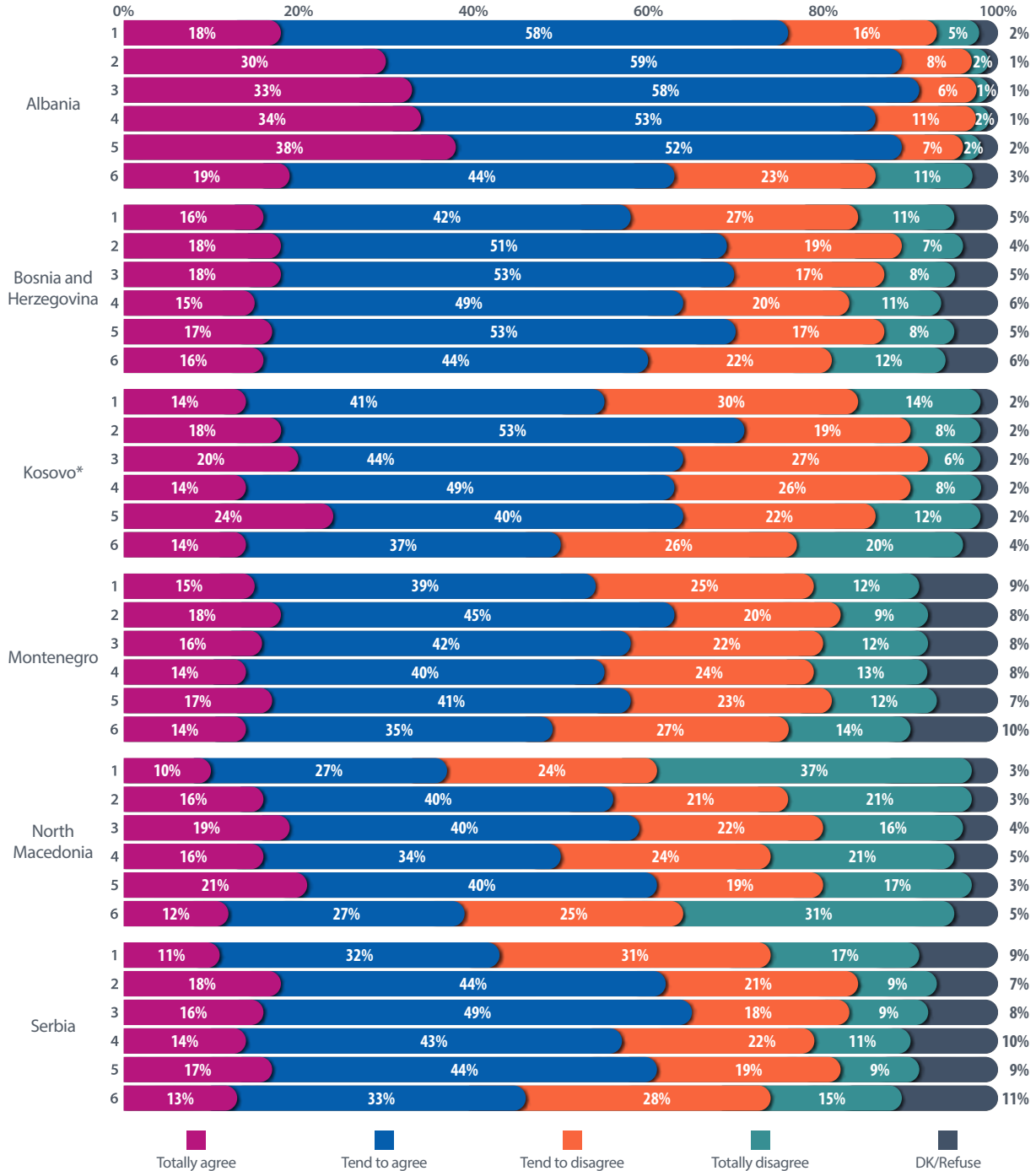
Figure 27. Opinion on which group of emigrants should be accepted in your economy

To what extent do you agree or disagree that the following groups of immigrants should be accepted by your economy.

– Results by economies

1) People from Muslim countries who wish to work in my economy. 2) People coming from Western Balkans who want to work in my economy. 3) People fleeing from the war in Ukraine. 4) People suffering from human rights violations in their country who are seeking political asylum. 5) Citizens of other countries of the European Union who wish to settle in my economy. 6) People fleeing from the internal conflicts in their country such as Syria, Afghanistan, and Sudan.

(All respondents, N=6023, single answer, scale from 1 to 4, share of total, %)



Albania emerges as the most receptive economy across categories, ranging from highest 91% welcoming support for Ukrainians, to lowest 63% for Syrians, Afghans or Sudanese.

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In contrast, North Macedonia and Serbia show comparatively less openness to Muslim migrants at 37% and 43%, respectively ranking lower than other economies. The latter two, alongside Montenegro, also register lower willingness to receive Syrians, Afghans and Sudanese at 49%, 39% and 46%, respectively.

Ukrainians have high acceptance levels across the region (69%). On economy level the acceptance is at 91% (Albania), 71% (Bosnia and Herzegovina), 64% (Kosovo*), 59% (North Macedonia), 58% (Montenegro) and (65%) in Serbia. Similar majorities are receptive towards regional migrants, 89% in Albania, 71% in Kosovo*, 69% in Bosnia and Herzegovina, 63% in Montenegro, 62% in Serbia and 56% in North Macedonia.

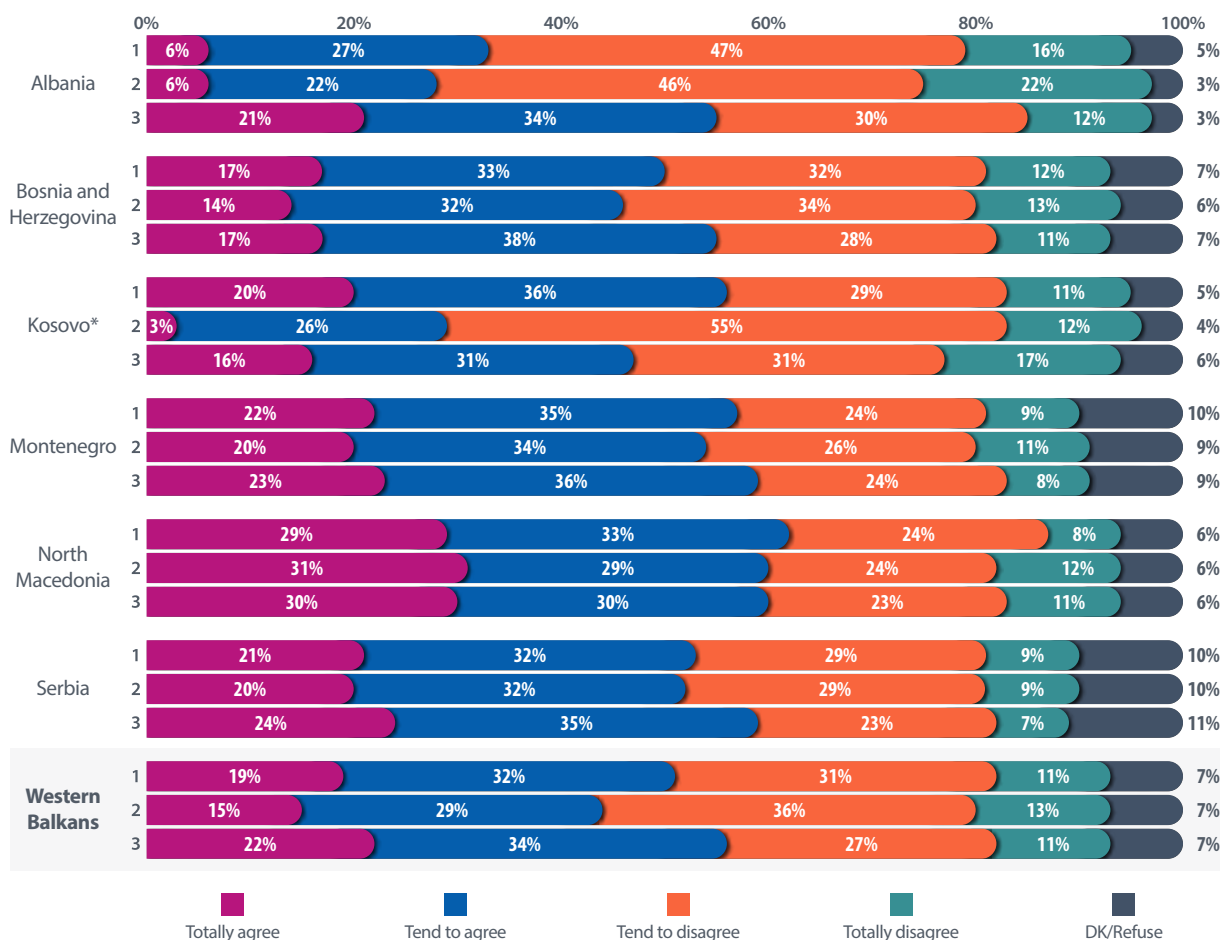
While generally receptive, migrant backgrounds impact acceptance levels in some economies. Scepticism appears higher towards those from Muslim economies, regardless of conflict-induced motives. Reservation levels are nearly identical in Montenegro, North Macedonia and Serbia across both categories, hinting religious culture—rather than perceived threat export—drives opposition.

Figure 28. Opinion on which way is appropriate to address the challenges caused by immigrants

Using a scale from 1 to 4, where 1 means totally agree and 4 means totally disagree, to what extent do you agree or disagree that each of the following ways is appropriate in addressing the challenges caused by immigrants in your economy?

- 1) All immigrants, whether legal or illegal and their children, even those who were born in my economy should be sent back to their country of origin.
- 2) Legally established immigrants should all be sent back to their country of origin.
- 3) Legally established immigrants should be sent back to their country of origin if they are unemployed.

(All respondents, N=6023, single answer, scale from 1 to 4, share of total, %)



Curiously, when framed as an economic burden, all Western Balkan respondents, except Albania (33%), agree immigrants should be sent back, even if legally established. Bosnia and Herzegovina agree at 50%, Kosovo*

56%, Montenegro 57%, North Macedonia 62%, and Serbia 51%. This contradicts earlier tolerance, revealing complex attitudes.

Overall, 51% say all immigrants, legal or not, should return to their places of origin. But when specifying legally present migrants, Albania (63%), Kosovo* (67%) and a slight (47%) majority in Bosnia and Herzegovina oppose their removal. Meanwhile, Serbia (52%), Montenegro (54%), and North Macedonia (60%) still support expulsion, even of legal migrants. Similarly, the majorities (55%) in Albania and Bosnia and Herzegovina, (59%) in Montenegro and Serbia, and (60%) in North Macedonia would rather have those unemployed sent back, except for Kosovo* which holds an opposite majority view at 48%. While favouring humane treatment in principle, publics display economic and cultural anxieties when considering integration realities.

Conclusions

Kosovo* and Albania now favour immigration to fill gaps, but resistance persists elsewhere over perceived threats to jobs and culture. However, public discourse on immigration remains disconnected from facts. Most citizens view the debate as lacking data, not reflecting their own experiences. Visibility is limited, as immigration gets little media attention. This perpetuates misconceptions.

Attitudes lean positive towards refugees, paired with expectations for EU support. Backing is highest in Albania, and lowest in North Macedonia. While supportive in principle, citizens want adequate EU assistance.

Opinions diverge sharply on border/boundary control sufficiency. Satisfaction jumped in Bosnia and Herzegovina but plunged in Kosovo* since 2021, underscoring the issue's fluidity. Proximity to transit routes shapes attitudes.

Remarkably, 80% now back a joint plan for collective migration governance, up from 43% in 2021. This reveals growing awareness that unilateralism is ineffective. With societies aligning ahead of politicians, a window has opened for strengthened regional cooperation.

Citizens want a balanced, compassionate approach - enhancing cooperation on borders/boundaries and visas while addressing root causes. However, the region splits on military operations in places of origin or fully liberalising entry rules.

As migrants become more commonplace, tolerance has risen, but remains conditional on upholding law and order. Support for detention centres has grown, though majorities favour access to courts and welfare for vulnerable groups.

Receptiveness to immigrants varies by origin. Majorities welcome those from Ukraine, the region, and the EU, but scepticism persists towards Muslim economies. Serbia's openness to Ukrainians is notable given its Russia ties.

When framed as an economic burden, many reverse earlier openness and agree even legal immigrants should be sent back. Tolerance in principle masks anxieties over integration realities.

Nonetheless, the oscillations of opinion regarding migrants indicate that the publics of the region are rather confused and do not have coherent attitudes. This can be a window of opportunity for policy makers to channel accurate information in their societies, free from prejudice and xenophobia towards migrants.

E. Emigration intentions and perceptions of quality of life, including security and political situation

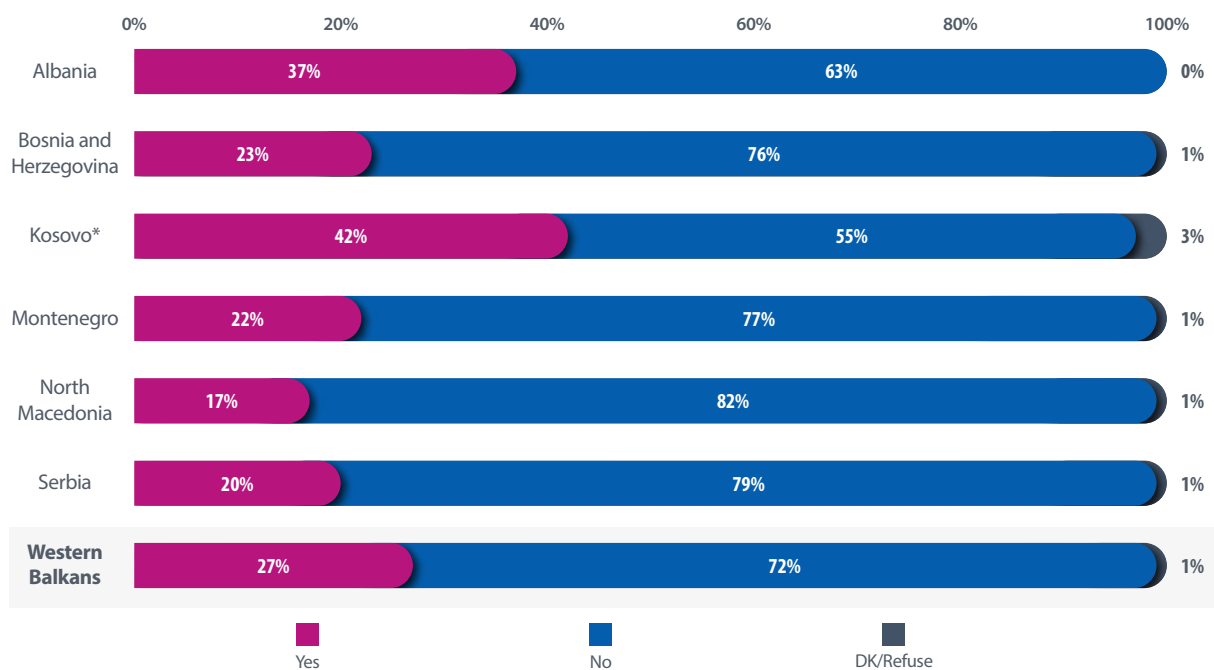
The Western Balkans has a long history of emigration, though at varying intensities. By 2020, over one-fifth of region citizens lived abroad per OECD estimates.³⁵ While migration continues, only around one-third now considers leaving – an 11-point drop since 2022. This indicates possible stabilisation after decades of exodus, yet economic and political discontent still drives migration interest.

Kosovo* and Albania show the strongest emigration leanings at 35% and 31% respectively, concentrated amongst educated youth facing dire job shortages and hopelessness. Potential migrants mainly seek long-term stays abroad, especially Albania, aiming to access networks and opportunities. Kosovo* residents prefer shorter stays, constrained by mobility obstacles. Younger, educated citizens are most likely to consider emigrating, facing the starkest employment shortages. But overall, intentions dropped 11 points, indicating possible easing of sentiments.

Figure 29. Length of staying abroad

Have you so far stayed abroad for longer than 3 months?

(All respondents, N=6023, single answer, share of total, %)



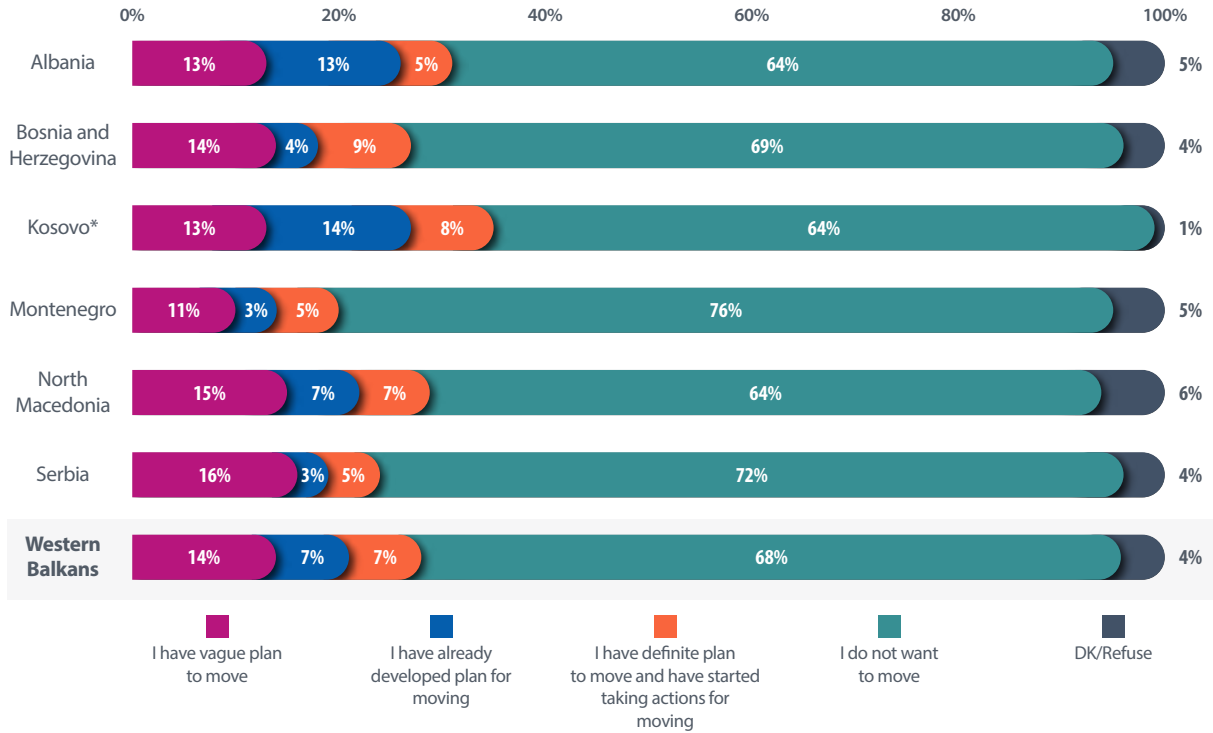
Most respondents (72%) lack extended foreign stays exceeding 3 months, indicating limited emigration. Kosovo* (42%) and Albania (37%) comprise the largest shares with such experiences, while other economies range from 17% (North Macedonia), 20% (Serbia), 22% (Montenegro), to 23% (Bosnia and Herzegovina). These figures correlate with historic high migration propensities of Albania and Kosovo*, indicating a relatively high number of returnees in these two economies. Males comprise a larger group (28%) of those having exceeded 3-month stays abroad compared to (25%) females.

35 OECD. 2022. Labour Migration in the Western Balkans: Mapping Patterns, Addressing Challenges and Reaping Benefits.

Online: <https://www.oecd.org/south-east-europe/programme/Labour-Migration-report.pdf>

Similarly, most (29%) of those exceeding 90-day duration are well-educated, outweighing the ones with only primary education (22%). This may suggest that a good number of those studying abroad have returned to their home economies. These variations suggest different migration propensities shaped by economic, institutional, and social dynamics.

Figure 30. Intention to move abroad
Do you intend to move abroad for living and working?
(All respondents, N=6023, single answer, share of total, %)



Most respondents (68%) oppose migrating abroad for work, though 28% harbour vague to firm plans - an 11-point contraction from 2022. Kosovo* retains the highest emigration inclination at 35%, followed by Albania (31%) and North Macedonia (29%). Montenegro registers the lowest share at 19%. Kosovo* and Albania hosts the largest number of those who have already developed a plan to move at 14% and 13% respectively, while Bosnia and Herzegovina (9%), Kosovo* (8%) and North Macedonia have the largest number of those who are about to materialise this plan. Those intending to leave, by and large, concentrate in the active 18-44 working-age cohort, while stayers dominate the 45-65+ bracket.

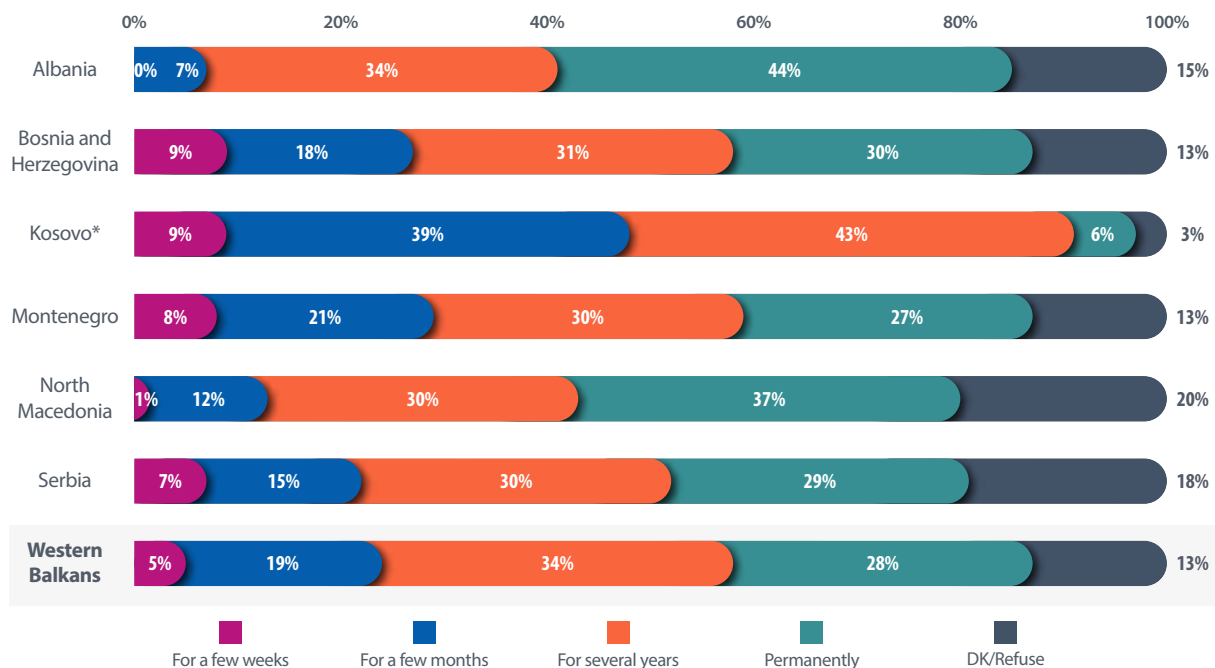
Notwithstanding contractions from 2022, emigration sentiments persist in the region, predominantly in Albania, which seems to have embraced an enduring emigration inclination. Such a trend will undoubtedly sharpen the demographic crisis, due to a dangerous combination of persistent migration and population aging. This in turn will automatically translate into more labour shortages, already identified as a pressing problem for Albania.

The push-factors driving emigration are related to economic reasons and mistrust in institutions, correlating to highest dissatisfaction in Albania. At the same time, the more family networks, the number of those able to use these ties amplifies, further fuelling migration outflows. On the other hand, the migratory inclination of well-educated respondents inevitably amplifies brain-drain problems already present in the regional economies. While this contingent is inclined to move to already stable societies instead of fighting to secure better conditions at home, their departure leads to underperformance in all areas and eroded accountability at home.

Figure 31. Expectations for the length of stay abroad

How long do you expect to stay abroad?

(Respondents who want to move, N=1634, single answer, share of total, %)



Most potential migrants (62%) plan long-term stays abroad for years or permanently, versus 24% for weeks to months. Again, Albania's respondents comprise the overwhelming majority (78%) seeking long-term emigration, followed by those of North Macedonia (67%), Bosnia and Herzegovina (61%), Serbia (59%) and Montenegro (57%). Kosovo* exhibits a balanced approach, with 49% of respondents eyeing long-term versus 48% short-term departures.

Similarly, Albania has the largest share (44%) of those seeking to leave permanently, followed by North Macedonia (37%), Bosnia and Herzegovina (30%), Serbia (29%), Montenegro (27%), while Kosovo* is at lowest end (6%). This is indicative of a demographic crisis in the making. This has been coupled with increased possibilities for migration, amongst other reasons, as demand for skilled labour has soared in some EU member states, especially Germany. In the latter, a Western Balkans Regulation, which allows skilled labourers to move to Germany, was slated to expire in 2023, but plans to renew it were declared in 2023 and quotas doubled from 25,000 to 50,000.

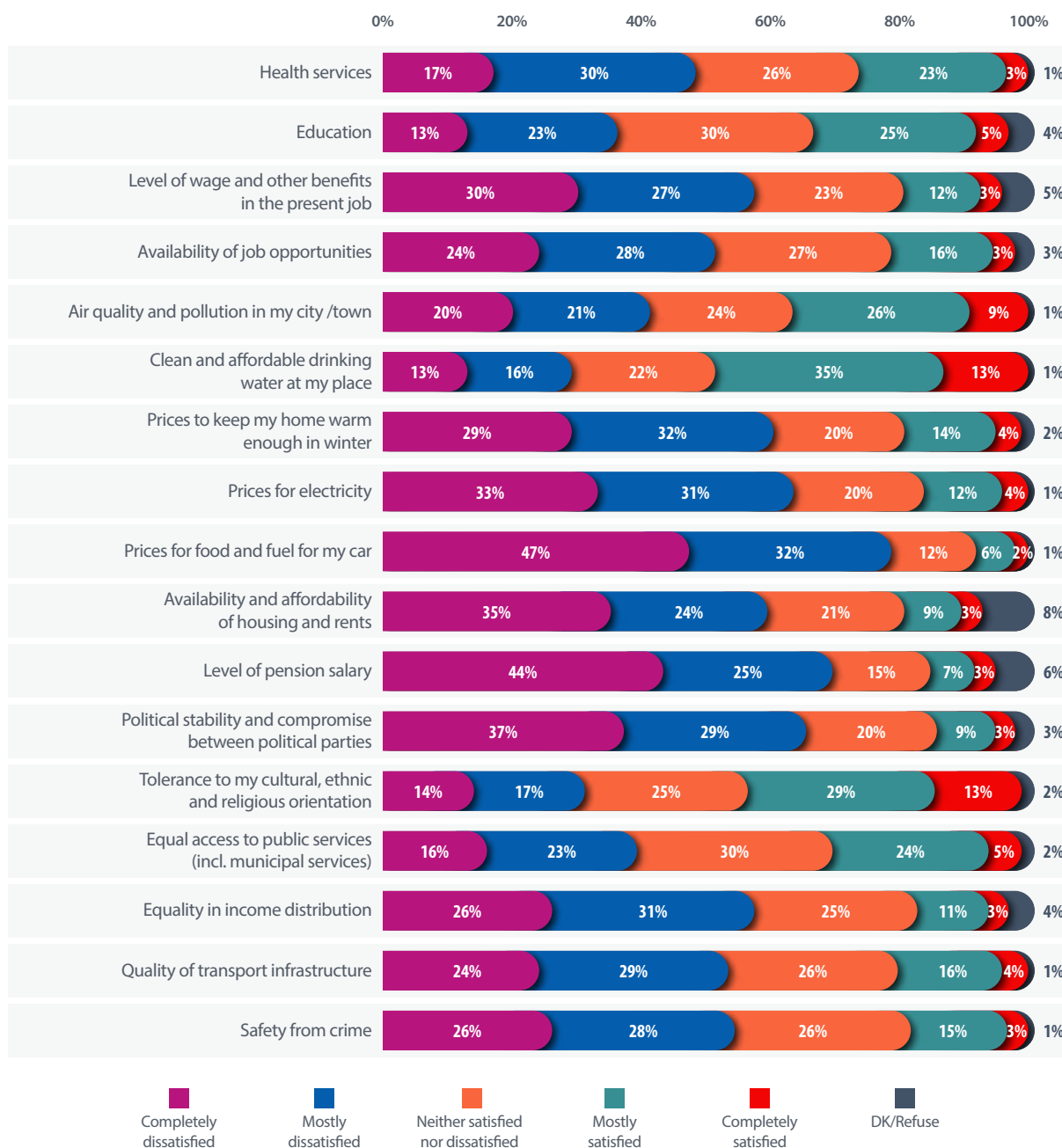
Several dynamics underlie these discrepancies. Potential emigrants perceive irremediable dysfunction in their economies incentivising permanent exits. Albania's traditionally higher emigration rate and larger diaspora reinforce tendencies towards open-ended emigration, while constrained mobility shapes Kosovo's* preference for short-term travels. The Western Balkan economies should be alarmed of the strong majorities of potential migrants who seek permanent exits, signalling a vicious circle of a demographic, economic and political crisis.

Figure 32. Level of satisfaction in the place of living

Could you please tell how satisfied are you with each of the following in your place of living?

– Results for the Western Balkans region

(All respondents, N=6023, single answer, scale from 1 to 4, share of total, %)



Respondents exhibit widespread dissatisfaction in their place of living, particularly over cost of living, incomes, and jobs. The only indicators where those who are content outnumber sceptics are clean and affordable drinking water and tolerance to cultural, ethnic, and religious orientation with 48% and 42% respectively, in contrast to 29% and 31% who are dissatisfied.

All economies of the region are highly worried over food and fuel prices, spiking with 90% in Albania to 73% in Bosnia and Herzegovina at the lower end. Obviously high inflation levels have had a shocking impact on most households, hitting them on their most basic needs. While a large portion of the family budgets is allocated to basic costs of living such as food, the increase in basket prices exacerbates inflation impact. Not surprisingly,

Albania has the highest dissatisfaction having the lowest PPP index in the region, as per World Bank data³⁶, which means that its genuine ability to cope with inflation is more challenging, albeit its lower inflation rate than the rest of the region.

Albania is the most dissatisfied economy in the region reflected across indicators followed by North Macedonia (16/17). Along with food/fuel prices, most dissatisfaction is accumulated around house warming, electricity, and wage levels. With stagnant salaries and pensions and growing income inequalities, the overwhelming majority of households in both economies are struggling to cover basic costs of living. Just cultural tolerance elicits satisfaction (60%) in Albania, while satisfaction surpasses dissatisfaction only over clean and affordable drinking water in North Macedonia (44%).

Bosnia and Herzegovina (69%), Serbia (65%), Montenegro (62%) and Kosovo* (63%) share similarly high concerns over political stability, as each economy experienced its peculiar political battles.

Kosovo* stands out with a different tone of mixed sentiments compared to other economies of the region, registering high unhappiness in 6/14 areas. Similar to other economies of the region, dissatisfaction centred on food/fuel costs (76%), political stability (63%), salary levels (61%), and income equality (55%). However, Kosovo* stands out with the most sizable group of impassive respondents (neither satisfied nor dissatisfied) across indicators, most notably in education (48%), wage levels and air quality (46%), job opportunities (43%), and equal access to public services, outweighing both those satisfied or dissatisfied. These data correlate with the general more optimistic outlook that Kosovo* has also in other security indicators.

Conclusions

Several dynamics seem to drive emigration in the Western Balkans region: The overwhelming concern is the rising cost of basic necessities like food, fuel, housing, and utilities. With low wages and pensions failing to keep pace, economic deprivation has become pervasive, evidenced by extreme dissatisfaction. This reflects a growing sense of insecurity and vulnerability amongst citizens, especially in Albania and North Macedonia, where dissatisfaction spikes at worrying levels.

Poverty, unemployment, and uneven development concentrate hardships for large populations dependent on (insufficient) public support. Such difficult circumstances paired with disillusionment at political elites viewed as corrupt and linked to organised crime are key push factors for migration in the regional economies, especially in Albania where migration inclination persists. While most potential migrants are of young age and well educated, the regional economies face complex challenges posed by brain-drain, labour shortage and aging populations. Inward migration is not a remedy as long as migrants use the region only as a transit route towards EU, and acceptance levels in the region are conditional to migrants' backgrounds.

On the other hand, as potential migrants are less inclined to seek change at home, their departure further erodes the potential for transformation, risking a viscous political, economic, and demographic crisis.

36 World Bank. Spring 2023. Western Balkans Regular Economic Outlook. Online:
<https://documents1.worldbank.org/curated/en/099042023104012719/pdf/P179478085f70601a0aac3035c4560691ca.pdf>

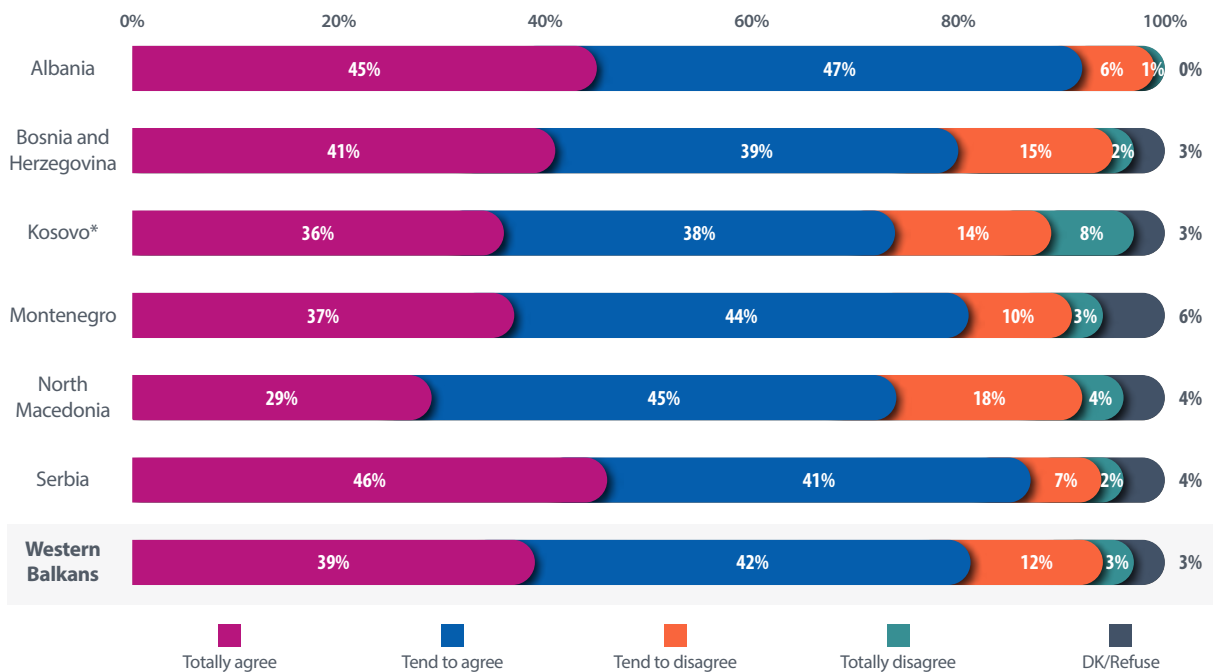
F. Perceptions on disaster prevention and disaster preparedness

While small, there has been an overall increase in the percentage of respondents who feel natural and manmade disasters are a serious threat to human life in the region (from 77% in 2021 to 81% in 2023). The effects of climate change are gaining traction on a global scale, amplified even further, including in the region, by the youth climate protests and calls for action. In recent years, there have been renewed efforts at regional and economy-specific environmental initiatives that mirror global developments. There have been in fact several regional collaborations, such as those protecting rivers, combating air pollution, etc., some of the key environmental concerns in the region.³⁷

Figure 33. Opinion on natural disasters

To what extent do you agree with the following statement: Natural and manmade disasters present a serious threat to human life and material assets in [ECONOMY].

(All respondents, N=6023, single answer, scale from 1 to 4, share of total, %)



Majority of respondents in the current survey (81%) agree with the statement that natural and manmade disasters present a serious threat to human life and material assets, which reflects a slight increase from 80% in the 2022 survey. The overall rise in agreement amongst respondents in the region suggests a growing awareness and concern about the potential risks associated with natural and manmade disasters.

Albania stands out as the economy with the highest level of agreement with the statement, as a significant majority (92%) of respondents express concern about the threat of disasters. Serbia follows closely, with 87% of respondents agreeing with the statement. This strong level of agreement indicates that a considerable portion of population in Serbia also recognises seriousness of the threat posed by natural and manmade disasters.

37 The Balkan Forum. 2022. Environmental Activism in the Western Balkans. Online::

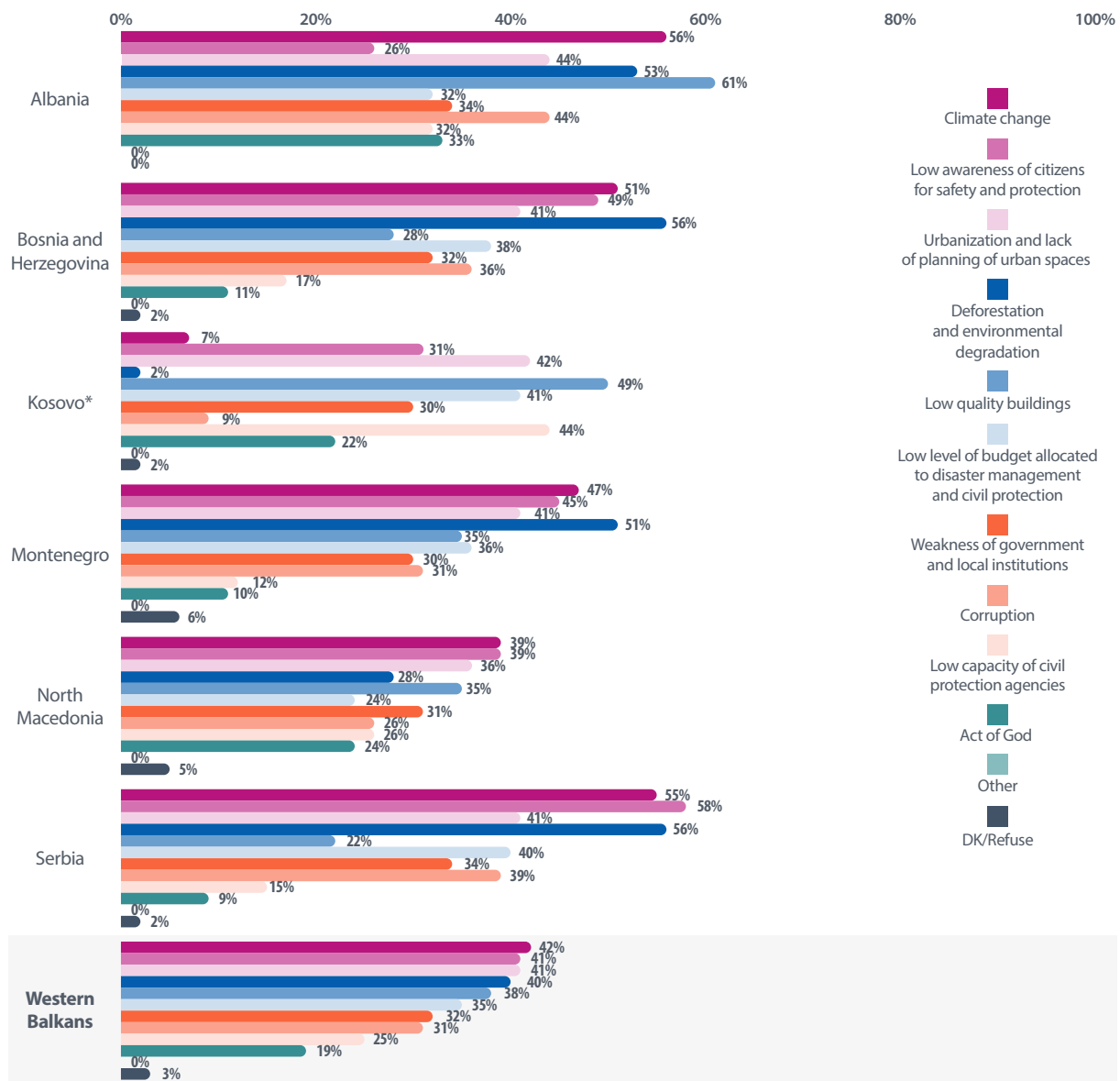
https://thebalkanforum.org/file/repository/Environmental_Activism_in_the_Western_Balkans_The_Balkan_Forum_F_ISBN.pdf

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Figure 34. Underlying factors for fatality and serious injury by natural and manmade disasters

Which underlying factors do you think are the most relevant for fatality and serious injuries caused by natural and manmade disasters?

(All respondents, N=6023, multiple answers, share of total, %)



Of underlying factors that are most relevant for fatality and serious injuries caused by natural and manmade disasters, the most impactful for respondents across the region of the Western Balkans are the following: climate change (42%), urbanisation and lack of planning of urban spaces (41%), low awareness of citizens of safety and protection (41%), followed by deforestation and environmental degradation (40%).

Low quality buildings are perceived as the most relevant factor in Albania (61%) and Kosovo* (49%). On the other hand, in North Macedonia (39%) and Serbia (58%) the most impactful factor for respondents is low awareness of citizens of safety and protection.

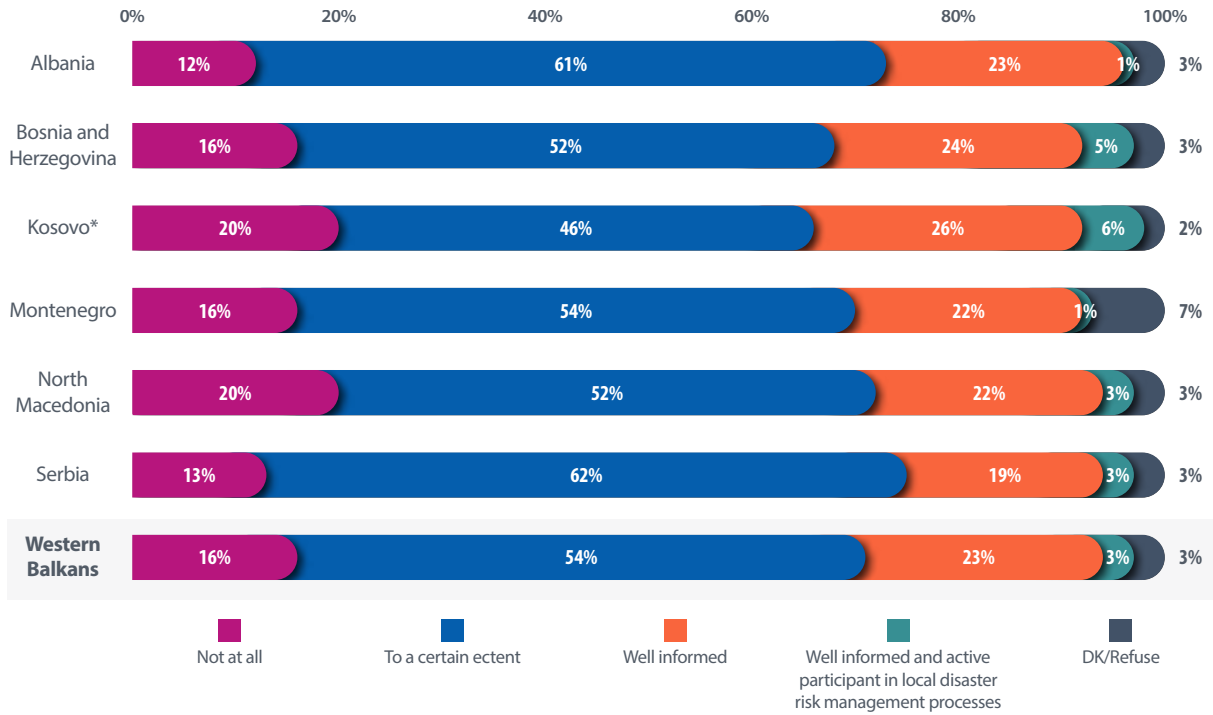
In the Western Balkans region, the majority of economies acknowledge climate change, deforestation, and environmental degradation as shared contributors to fatality and serious injuries caused by natural and manmade disasters. However, Kosovo* stands out as an exception, with only 7% of respondents considering

climate change as a significant factor and merely 2% recognising the role of deforestation and environmental degradation, according to the survey participants.

Figure 35. Familiarisation with the main natural and manmade disasters risks

To what extent are you familiarised with the main natural and manmade disaster risks in your area?

(All respondents, N=6023, single answer, share of total, %)



Based on the survey findings, it is evident that the region, on average, demonstrates a lack of awareness and knowledge regarding the natural disaster risks confronting their economies. Within the Western Balkans region, approximately 54% of respondents said that they were familiar to a certain extent, while only 3% reported being well informed and active participants in local disaster risk management processes.

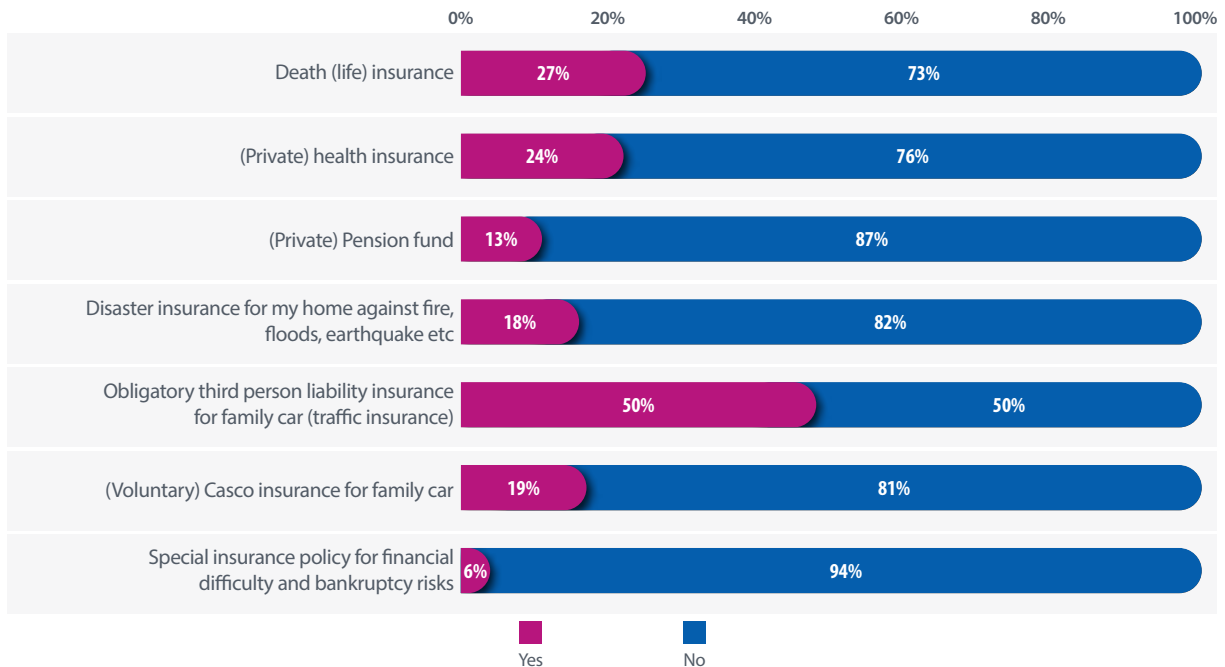
Amongst the individual economies examined, Serbia emerges as the least informed, with 62% of respondents to some extent and 13% not at all. In contrast, Kosovo* stands out as the most informed one amongst Western Balkan economies, with 26% well-informed and an additional 6% that are well informed and active participants in local disaster risk management processes.

Figure 36. Types of insurance policy bought by respondents

Which types of insurance policy did you buy more than once in your life? – Results for the Western Balkans region

1) Death (life) insurance, 2) (Private) health insurance, 3) (Private) Pension fund, 4) Disaster insurance for my home against fire, floods, earthquake, etc., 5) Obligatory third person liability insurance for family car (traffic insurance), 6) (Voluntary) Casco insurance for family car, 7) Special insurance policy for financial difficulty and bankruptcy risks

(All respondents, N=6023, single answer, share of total, %)



In the Western Balkans region, the majority (73%) of respondents do not have death (life) insurance. Amongst the economies in the region, Montenegro has the highest percentage of respondents (37%) who have death (life) insurance. The majority (76%) of respondents lack (private) health insurance. Albania stands out with the lowest percentage of respondents (11%) with (private) health insurance, whereas Serbia leads with the highest percentage (29%) of respondents with insurance, amongst the Western Balkan economies.

Within the Western Balkans region, the majority of respondents (87%) do not possess a (private) pension fund. Albania has the highest percentage of individuals without a (private) pension fund, with 96% of respondents falling into this category. Serbia closely follows, with 89% of respondents lacking a (private) pension fund. This suggests a notable gap in pension fund coverage, indicating potential challenges for retirement preparedness in the region.

The majority of respondents in the Western Balkans region (82%) lack home disaster insurance against fire, floods, earthquake, etc. Albania and Kosovo* have the lowest percentage (12% each) of respondents with this kind of insurance for their homes. This finding highlights the need for greater awareness and uptake of home disaster insurance in these economies.

There is an equal percentage of respondents (50%- 50%) in the Western Balkans region who have or lack obligatory third person liability insurance for family car (traffic insurance). Bosnia and Herzegovina stands out with the highest number of survey participants that have traffic insurance (60%).

The majority of survey participants in the Western Balkans lack Casco insurance for family cars (81%). Kosovo* stands out with the highest percentage amongst the economies in the region, as 89% of respondents in Kosovo* do not have (voluntary) Casco insurance for their family car.

Within the Western Balkans region, a mere 6% of survey participants have special insurance policy for financial difficulty and bankruptcy risks. Notably, Albania stands out with only 2% of respondents having this type of insurance coverage.

Conclusions

The survey data reveals varying degrees of disaster perception, awareness of underlying risk factors, and disaster education effectiveness in the Western Balkans region. The overall increase in disaster perception suggests an increasing concern about disaster risks, with Albania and Serbia showing the highest levels of agreement. However, Kosovo* and North Macedonia demonstrate a comparatively lower level of agreement. Regarding underlying risk factors, climate change, urbanisation, and lack of planning, and low awareness of safety are identified as major contributors to disaster impacts.

Kosovo* stands out in the region for its higher familiarity with disaster risks. However, when it comes to the recognition of certain other factors, Kosovo* lags behind. On the other hand, Serbia exhibits a lower level of information about disaster risks.

Disaster education is perceived to be effective in Kosovo*, but Montenegro and Serbia may need to address perceived gaps in disaster education within their educational systems. Overall, these findings highlight the importance of continuous efforts to enhance disaster preparedness, education, and awareness in the Western Balkans region to mitigate potential risks and improve community resilience.

The survey also reveals that insurance coverage varies significantly across different categories in the Western Balkans region. While there is a substantial proportion of respondents lacking various types of insurance, there are notable exceptions in certain economies. Montenegro demonstrates a relatively higher uptake of death (life) insurance, while Serbia leads in (private) health insurance coverage. However, disparities exist, with Albania having lower insurance coverage in several categories, including (private) health insurance, (private) pension funds, and special insurance for financial difficulty and bankruptcy risks.

G. Perceptions of the impact of disinformation, cyber THREATS, and vulnerability, as the main segments of hybrid threat

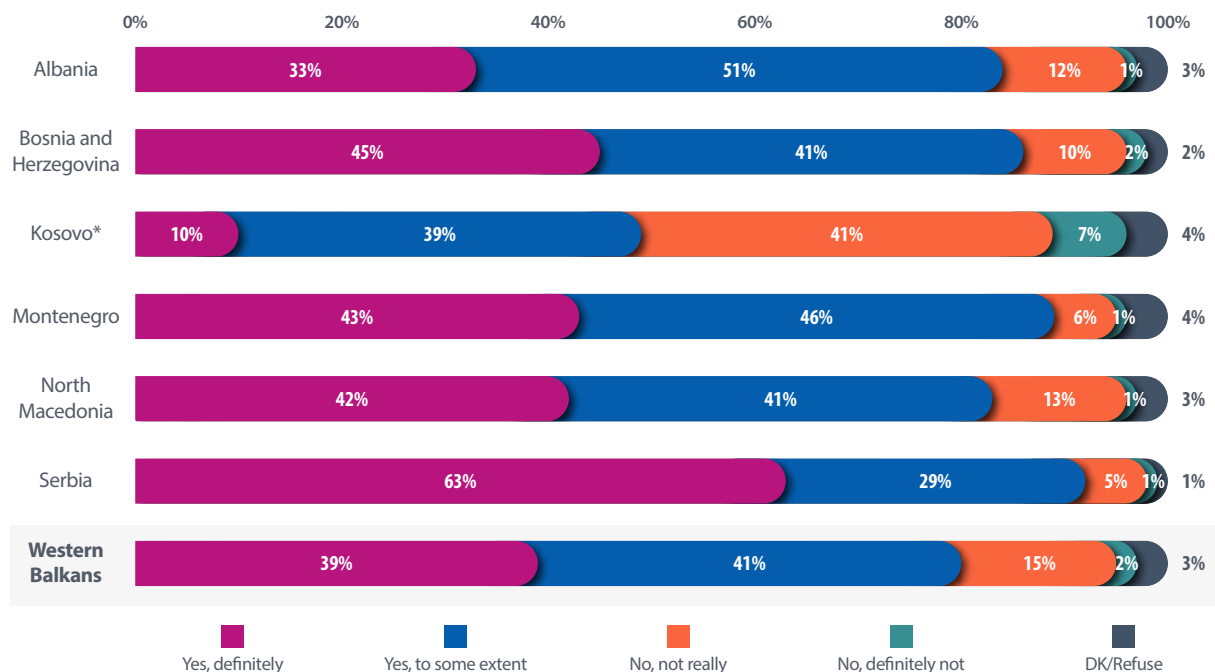
Residents of the Western Balkans have some of the lowest media literacy rates in Europe³⁸, as well as low levels of trust in public institutions including in the media, political parties, governments, and parliaments. Fake news is a negative influence on democratic reforms in the region. Misleading information, fake news and disinformation campaigns are also tools for foreign, malign actors that want to influence the security of the region. A plethora of research in recent years shows an increase in foreign malign influence in the Western Balkans. Harmful external pressures make use of key political developments and events within the economies but also manipulate with global issues, more recently Russian aggression on Ukraine. Since the start of the invasion in February 2022, there have been increased efforts by the Kremlin and WB proxies, through massive production of fake news to approve of the aggression and to blame NATO, EU and USA as main culprits for provoking the war.³⁹

As noted in the chapter on security, Western Balkan respondents perceive the dissemination of **fake news** as an **acute** threat. Very strong majorities in the region believe that “the existence of fake news or disinformation [is] a **problem** (Q 44) in their economies.” Thus, for the region as a whole, 80% definitely or to some extent believe so, 84% in Albania, 86% in Bosnia and Herzegovina, 89% in Montenegro, 83% in North Macedonia, and 92% in Serbia. Kosovo* is an outlier here, as just 49% believe that “the existence of fake news or disinformation [is] a problem”.

Figure 37. Opinion if fake news is a problem in your economy

In your opinion, is the existence of fake news or disinformation a problem in your economy?

(All respondents, N=6023, single answer, scale from 1 to 4, share of total, %)



38 Open Society Institute Sofia. 2022. Media Literacy Index 2022. Online: <https://www.osce.org/files/f/documents/0/4/534146.pdf>

39 Metamorphosis Foundation for Internet and Society. 2023. Geopolitical Perspective of Disinformation Flows in The Western Balkans.

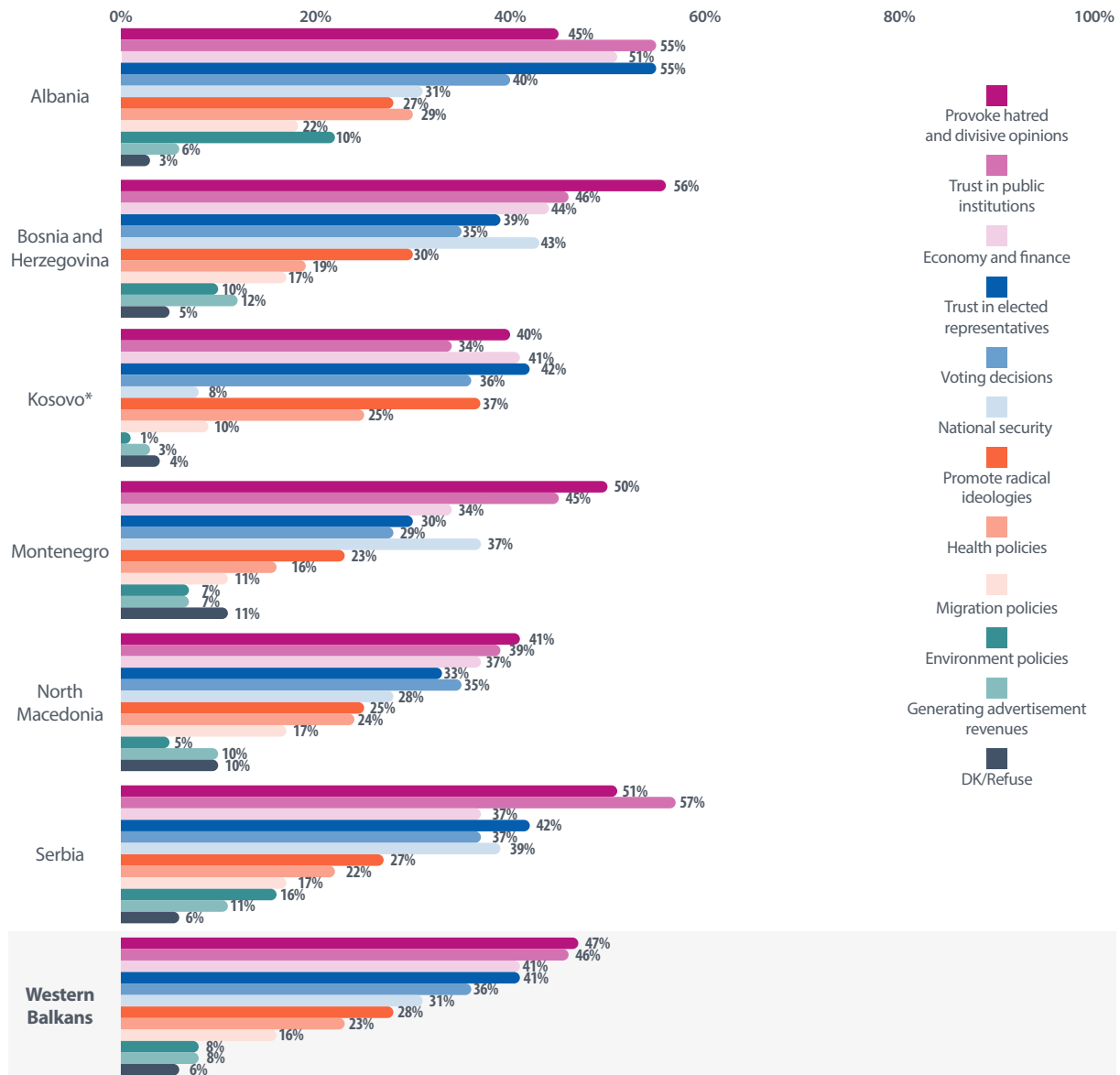
Online: https://metamorphosis.org.mk/en/izdanija_arhiva/geopolitical-perspective-of-disinformation-flows-in-the-western-balkans/

According to a majority of respondents, intentional disinformation causes most harm in **provoking hatred and divisive opinions** (47%) closely followed by “trust in public institutions” (46%). In Albania, beyond “trust in public institutions”, (55%), “trust in elected representatives” (55%) has also been identified as most under threat from fake news. In Bosnia and Herzegovina, respondents mostly fear that disinformation could “provoke hatred and divisive opinions” (56%) and harm “trust in public institutions”, (46%). Respondents in Kosovo* are concerned with the effects of fake news on “trust in public institutions” (42%) and “economy and finance” (41%). In Montenegro, beyond fears regarding the effects on the “trust in public institutions”, (45%) there are concerns of potentials of disinformation to “provoke hatred and divisive opinions” (56%). The same pair of concerns exist amongst the respondents in North Macedonia (39% and 41% respectively) and Serbia (57% and 51% respectively). What is peculiar for the region regarding this issue is that in North Macedonia and Kosovo* there is a steady and sharp decrease in the concern with the effects of fake news on all possible institutions, processes, policies or feelings since 2021, except regarding the “migration policies” category in Kosovo* where there was an increase from 2021 to 2022 before the level drastically dropped in 2023.

Figure 38. Opinion on the area of public life which can be intentionally misinformed and caused harm

In which of the following areas of public life in your economy can intentional disinformation cause harm?

(All respondents, N=6023, multiple answer, share of total, %)



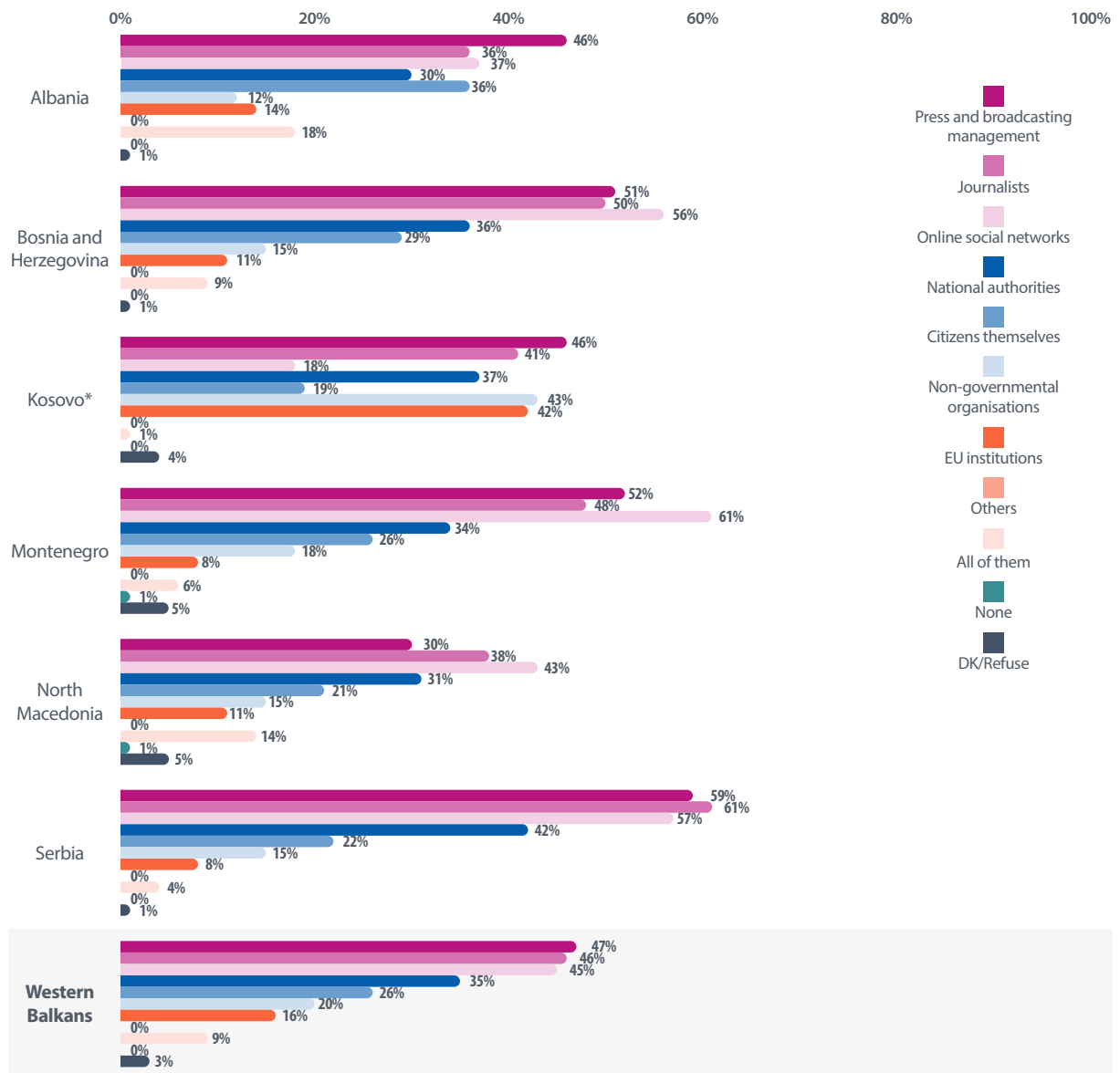
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When asked which 3 (three) institutions and media actors should act to **stop the spread** of fake news, respondents of the region as a whole have identified the following with most frequency: press and broadcasting management (47%), journalists (46%), and online social networks (45%). Respondents in North Macedonia, Serbia, Bosnia and Herzegovina and Montenegro have identified precisely this set of three institutions and media actors as important to fight fake news. Beyond these three, in Albania, “respondents themselves” were identified as institutions and media actors that should act to stop the spread of fake news, while in Kosovo* “online social networks” are not considered as important as “EU institutions” and “NGOs”.

Figure 39. Opinion on fake news

News or information that misrepresents reality or that is even false is called fake news. Which 3 (three) of the following institutions and media actors should act to stop the spread of fake news?

(All respondents, N=6023, multiple answer, share of total, %)

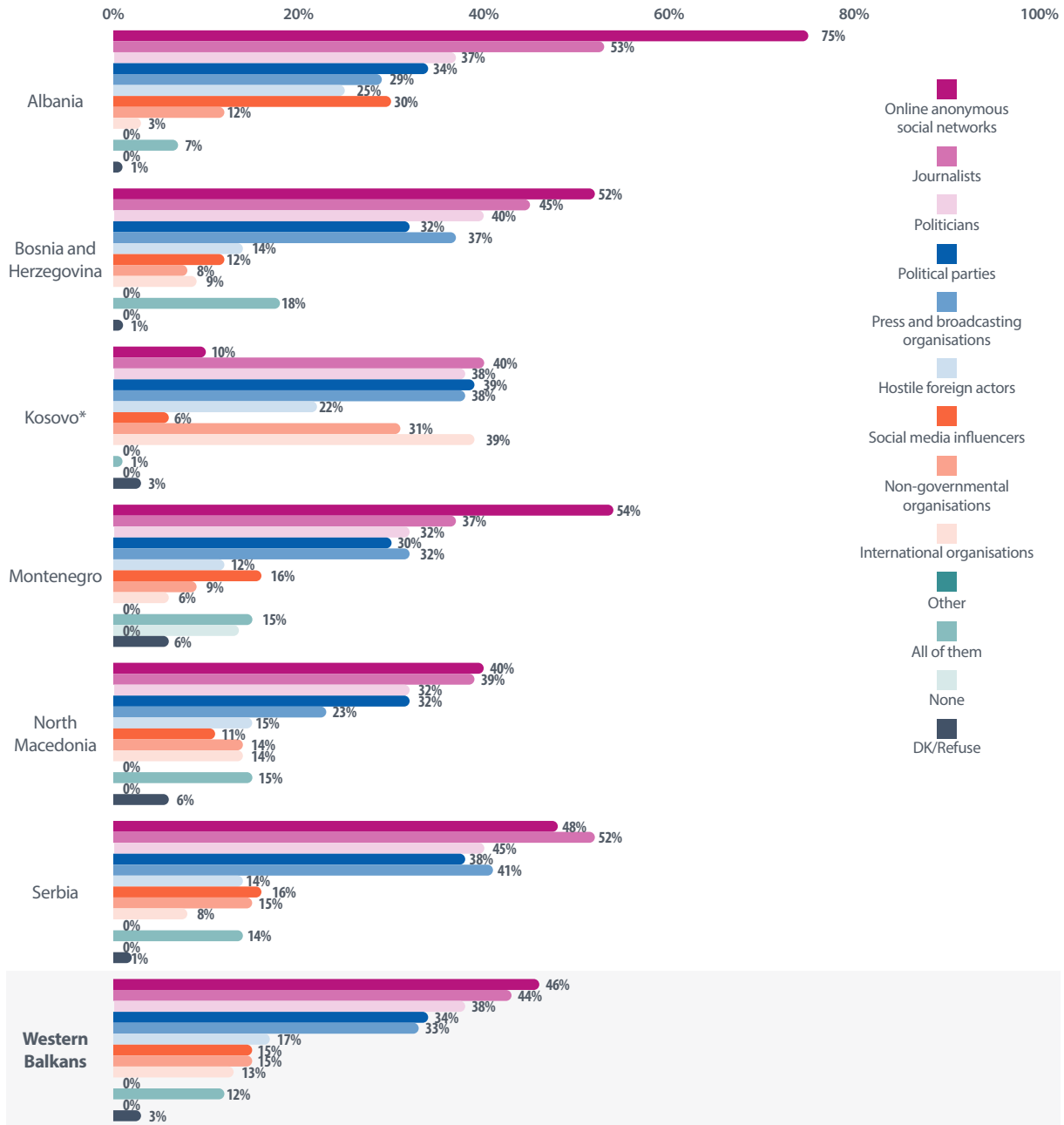


Regarding the **actors** that respondents in the region think spread disinformation the most in their economies “online social networks” are chosen by the region as a whole and by all economies except Serbia and Kosovo*. In Serbia, “journalists” (50%) and “online social networks” (48%) fare close, while in Kosovo* those are “journalists” (40%) and “political parties” (39%), whereas “online social networks” are rarely selected (10%).

Figure 40. Opinion on actors who spread fake news

In your opinion, which are the actors who spread disinformation the most in your economy?

(All respondents, N=6023, multiple answer, share of total, %)

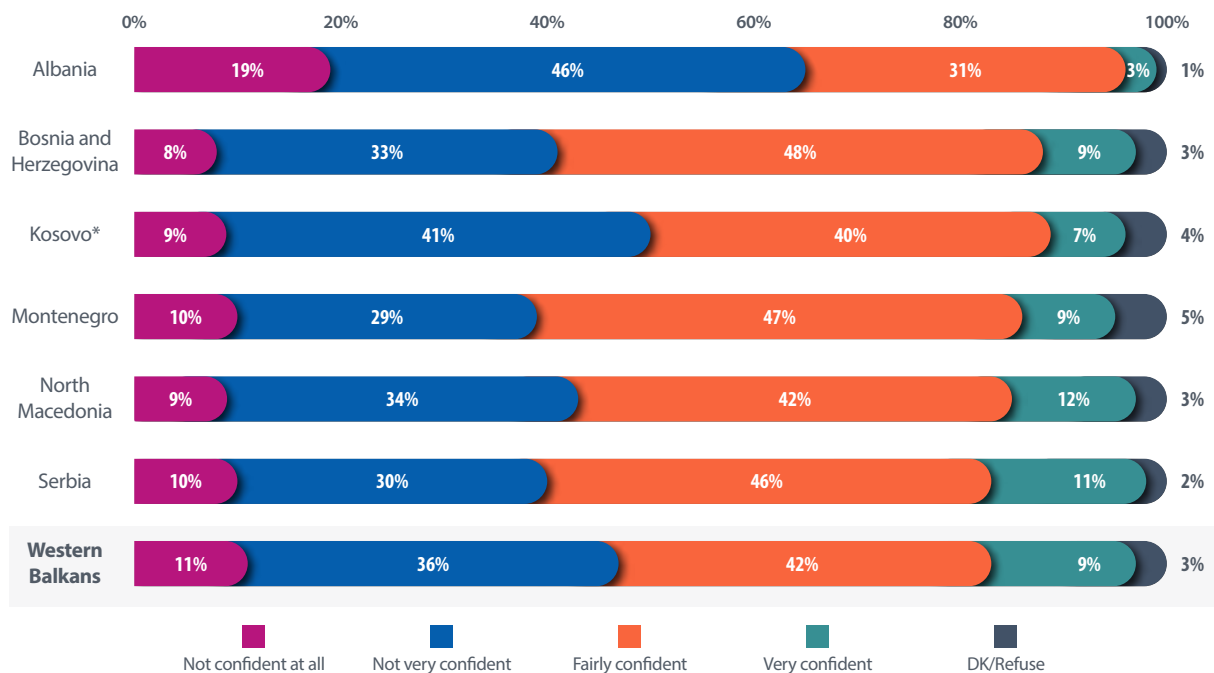


Respondents in the region do not feel very confident in their ability to **identify news** that misrepresent reality. Almost one in two respondents feel they are not able to identify fake news (47%), which should serve as a sign to enhance efforts to address this issue at a societal level. Respondents in Albania (34-65%) feel least confident to recognise spread of disinformation, followed by Kosovo* respondents (47%-50%). Evidently, there is much space to educate respondents of the Western Balkans on what is and how to identify fake news. This is even more important as Western Balkan residents very strongly feel that fake news is a threat to their economies.

Figure 41. Self-confidence to identify news that misinterpret the reality

How self-confident do you feel to identify news that misrepresent reality?

(All respondents, N=6023, single answer, scale from 1 to 4, share of total, %)



Conclusion

Western Balkan respondents perceive dissemination of **fake news** as an acute **threat**. According to them, the most preferred institutions to stop the spread of disinformation are press and broadcasting management, journalists, and online social networks, the first choice being “online social networks” across the region except in Kosovo*. As Western Balkan respondents increasingly move towards online news sources for news consumption, misleading information online will be a significant challenge.

Respondents in the region do not feel very confident to identify news that misrepresent reality but they feel that the existence of fake news or disinformation is a “problem in their economies” and that it affects “trust in public institutions, provoking hatred and divisive opinions”. All this implies that governments across the region should cooperate better with the likes of Google, Meta, Twitter, Telegram and Tiktok in order to educate citizens on how best to use these networks and do not become victims of disinformation, and how these networks can best stop the spread of fake news across the Western Balkans, perhaps with reliance and coordination with EUvsDisinfo, the flagship project of the European External Action Service’s East Strategic Communication Task Force.

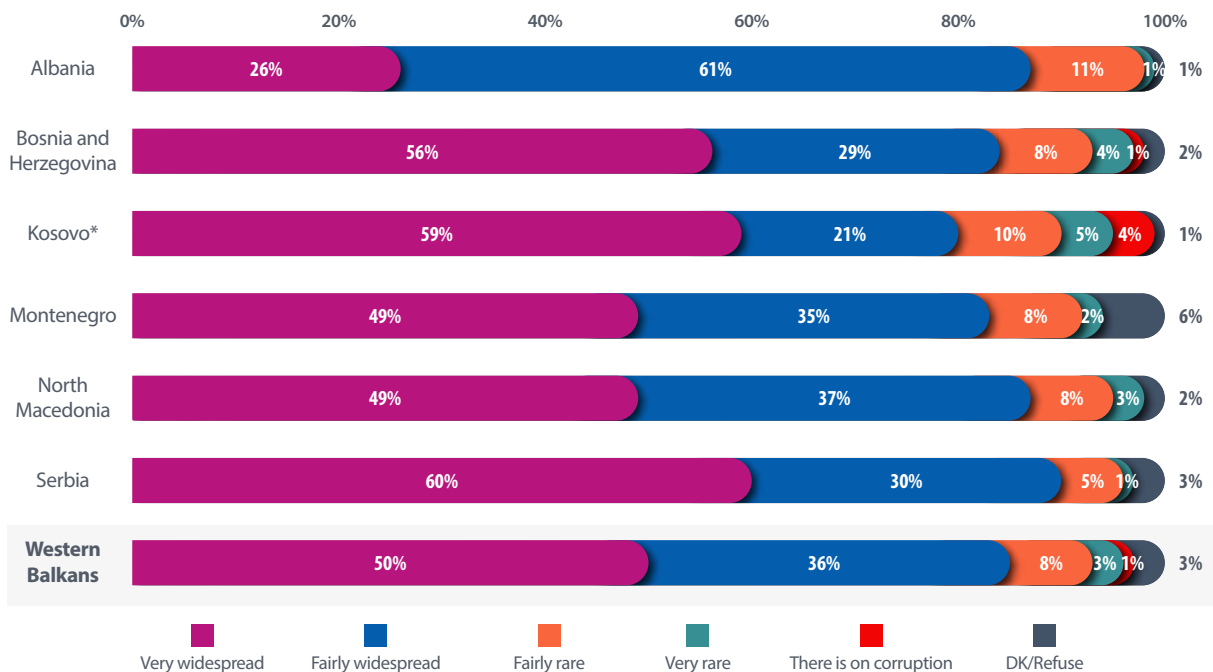
H. Perceptions on corruption

The ability of democratic systems to withstand instability depends in great part on the absence of corruption and nepotism in the public sector. State capture is an absolute impediment to democratic development. It can be defined as systemic political corruption in which politicians exploit their control over an economy’s decision-making processes to their own advantage. Consequently, although the European integration of the Western Balkans region has continued for more than two decades, corruption still permeates all spheres of the region’s societies. In its Enlargement Strategy, the European Commission acknowledged the lack of progress amongst the current EU candidate economies by underlying the existing problem of state capture at all levels of government and administration.⁴⁰

Worryingly, the anticorruption progress achieved in the Western Balkans between the early 2000s and mid-2010s has now been stalled with enthusiasm decreasing and main efforts largely made by civil society actors. European Commission’s 2022 progress reports on Western Balkan economies pointed out some new deficiencies when it comes to fight against corruption. According to the reports, all economies in the region suffer from high-level corruption, with low number of convictions being the main problem. Petty corruption remains an issue.

Indeed, *SecuriMeter 2023* reveals that corruption in the Western Balkans is perceived as widespread, a very strong majority of respondents believe that it is very or fairly **widespread**, some 86% in Western Balkans on average, 87% in Albania, 85% in Bosnia and Herzegovina, 80% in Kosovo*, 84% in Montenegro, 86% in North Macedonia, and 90% in Serbia.

Figure 42. Opinion on the spread of corruption
How widespread do you think the problem of corruption is in your economy?
(All respondents, N=6023, single answer, scale from 1 to 5, share of total, %)



40 European Commission. 2018. A credible enlargement perspective for and enhanced EU engagement with the Western Balkans. Online: https://neighbourhood-enlargement.ec.europa.eu/system/files/2023-01/communication-credible-enlargement-perspective-western-balkans_en.pdf

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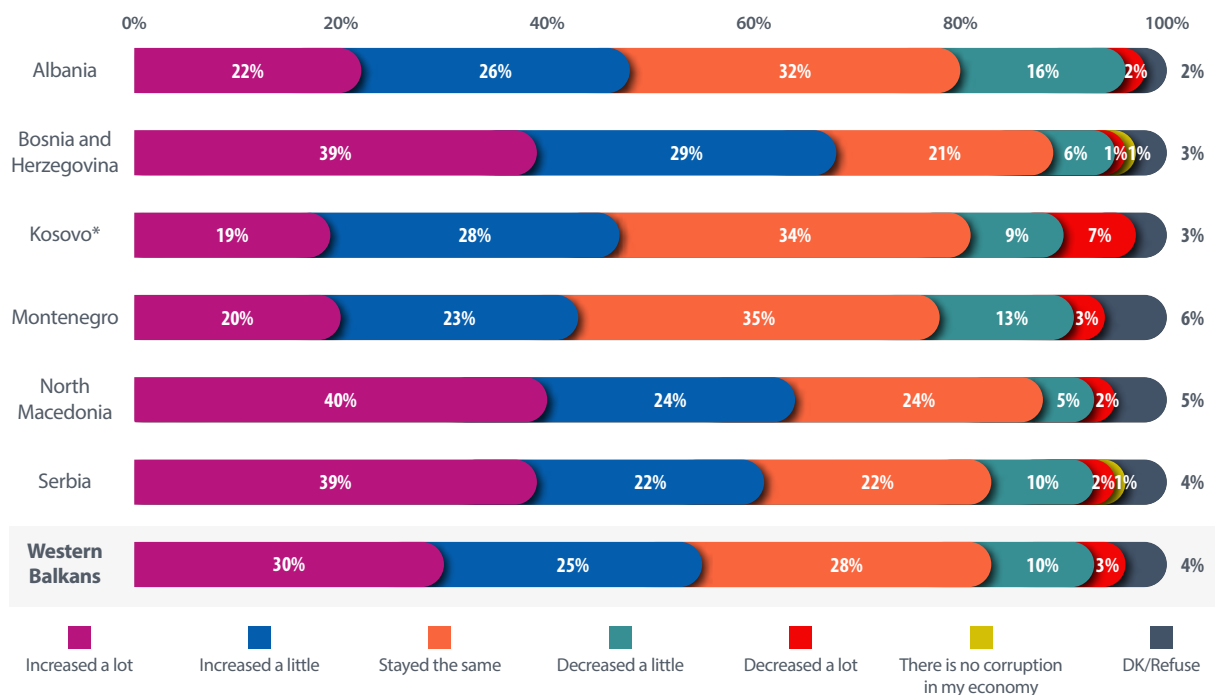
Even more troubling is that respondents of Western Balkans believe that “in the past (3) three years, the level of corruption in the economies” has increased. Some 55% of them believe that it has increased “a lot” or a “little”, with only 10% claiming it has decreased. Respondents in Bosnia and Herzegovina and those in North Macedonia have worst perception regarding the **rise of corruption in their economies**, where almost two thirds of them (68% and 64% respectively) state that this is true. In all other economies the opinion is shared by a plurality of respondents, from 43% in Montenegro, 47% in Kosovo*, to 48% in Albania, and 61% in Serbia.

Anti-corruption cases that manage to get through to conviction stage are few and often appealed and overturned at higher court instances. There are indications that corrupt practices in public procurement are ever present while the share of hidden economy has not diminished.

Figure 43. Opinion on the level of corruption in each economy

In the past (3) three years, would you say that the level of corruption in your economy has ...?

(All respondents, N=6023, single answer, scale from 1 to 6, share of total, %)

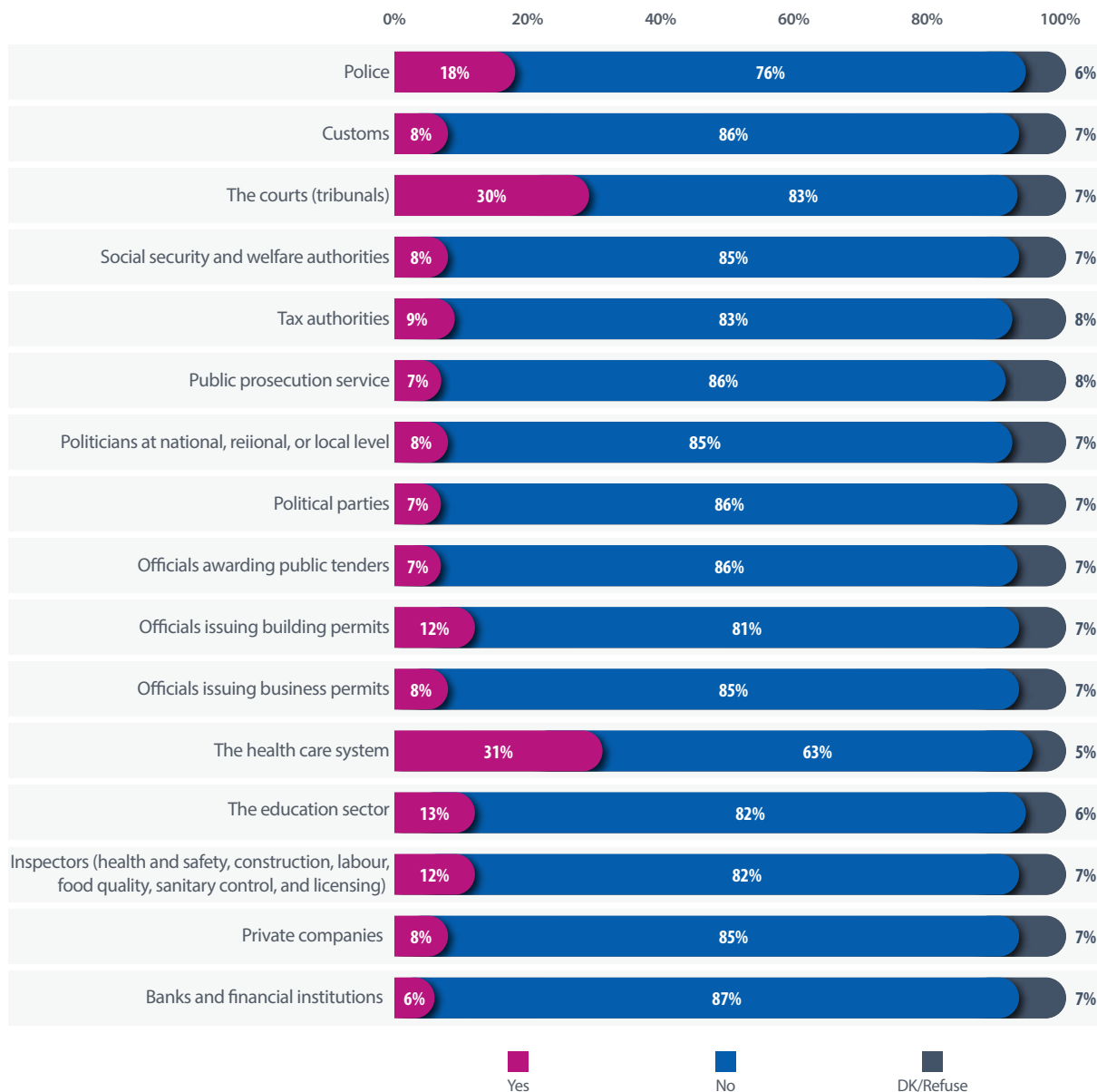


In the region, petty corruption of a smaller level is perceived as a necessity, or as a convenient way to obtain services. Thus, a very strong majority of respondents in the region (84%) believe that “bribery and the use of connections is often the easiest way to obtain certain public services”. However, despite believing that one needs to make illegal acts to obtain public services, respondents say that there is **little petty corruption** in the region. This observation is supported by an analysis of the respondents’ answers to a set of questions whether they, in contact or contacts with a number of different public institutions, or anyone living in their household, had to give an extra payment or a valuable gift, or make a donation in the past 3 years. Only 18% of Western Balkan respondents had to resort to such practice in contacts with the police, 8% with the customs, 10% with the courts, 8% with the social security and welfare authorities, 9% with tax authorities, 7% with the public prosecution service, 8% with politicians at economy, regional, or local level, 7% with political parties, 7% with officials awarding public tenders, 12% with officials issuing building permits (in 2022 land services), 8% with officials issuing business permits, 13% with the education sector, 12% with inspectors (health and safety, construction, labour, food quality, sanitary control, and licensing), 8% with private companies, 6% with banks and financial institutions. (Questions 49.1-49.16)

Figure 44. Opinion on the gift or donation given

In your contact or contacts with the following public institutions, did you or anyone living in your household have to give an extra payment or a valuable gift, or make a donation to the following public institutions in the past 3 years? – Results for the Western Balkans region

(All respondents, N=6023, single answer, share of total, %)



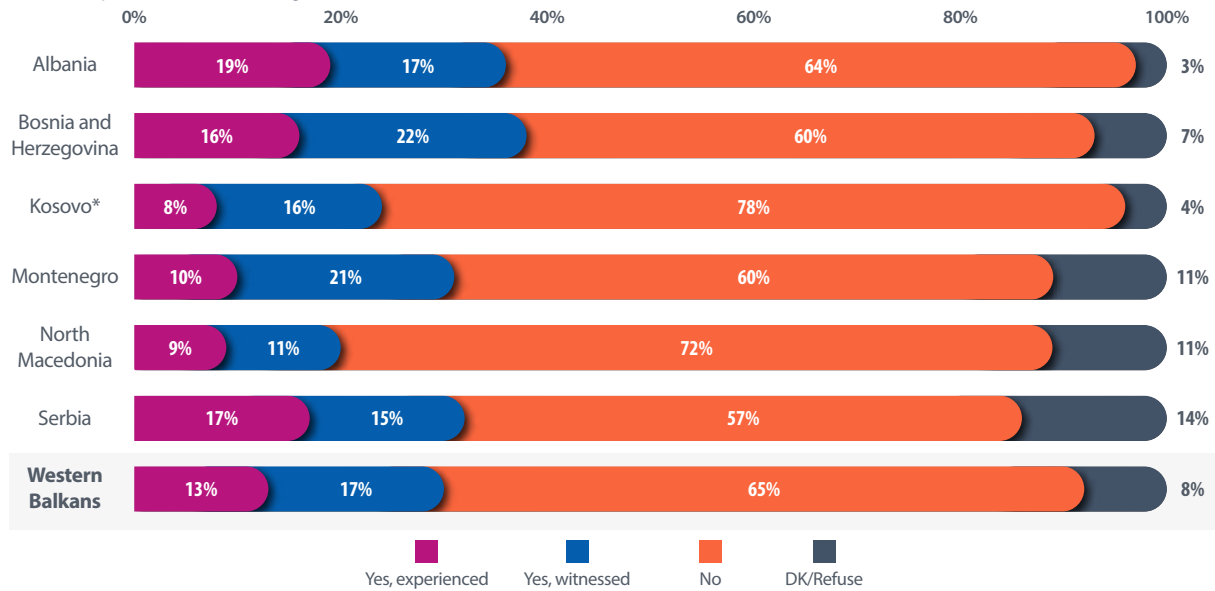
Compared with all the other, there is one sector where respondents of the Western Balkans stated that corruption is a more serious phenomenon. Namely, corruption by giving an extra payment or a valuable gift, or donation in the past 3 years to the **health care system** officials (medical and health care services in 22) is the biggest in the region comparing to perceived corruption in dealings with other institutions. On average, 31% of the Western Balkan respondents have stated that in contact or contacts with health care officials, they or anyone living in their household had to give an extra payment or a valuable gift, or make a donation in the past 3 years. The situation appears the worst amongst respondents in Albania, 48% of whom claim making such a corruptive act in 2023, followed by those in Serbia and Kosovo* (35% and 31% respectively). North Macedonia, Montenegro and Bosnia and Herzegovina respondents have reported lower levels of such corruption in the last year (18%, 27% and 26% respectively).

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One in three respondents have either experienced or witnessed a case of corruption themselves. The percentage is lowest in Kosovo* and North Macedonia (24% and 20% respectively) and highest in Albania and Bosnia and Herzegovina (36% and 38% respectively).

Figure 45. Experience with or witness of corruption in the last 12 months
In the last 12 months have you experienced or witnessed any case of corruption?

(All respondents, N=6023, single answer, share of total, %)

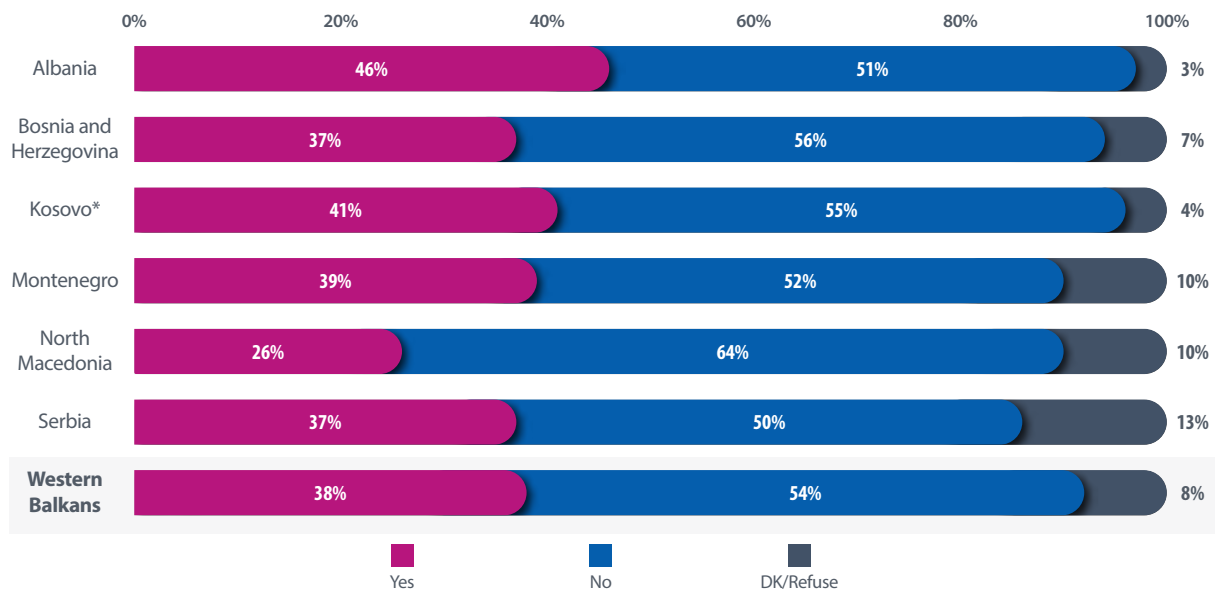


Respondents of Western Balkans rarely undertake petty corruption although a quite significant number of them know public officials who could potentially be a target of such activities. This can be ascertained when analysing the responses to the question “Do you personally know anyone who takes or has taken bribes?” where a majority of respondents in the region answered negatively to this question, 54%, but quite a number of them (38%) gave the affirmative answer. The percentage of those who know someone who takes or has taken bribes varies from the biggest 46% in Albania to the smallest 26% in North Macedonia.

Figure 46. Do you personally know someone who takes bribes?

Do you personally know anyone who takes or has taken bribes?

(All respondents, N=6023, single answer, share of total, %)



SecuriMeter 2023 reveals that corruption in the region is perceived to be on the rise. For the categories where one could compare the 2023 respondents' views to those expressed in 2022, regarding **petty corruption** in dealings with the police, courts (tribunals), tax authorities, officials issuing building permits (in 2022 land services), health care system (medical and health care services in 2022), and education sector, it is worrisome that the percentages **have grown**, in some cases significantly. For example, petty corruptive acts in dealing with the police have risen from 10% in 2022 to 18% in 2023 in the Western Balkans region as a whole and from 6% to 30% in Kosovo*, and 4 to 18% in Serbia. Perceived corruption in dealing with the tax authorities in the region, although still low, has more than doubled in 2023 in comparison to 2022, rising from 4% to 9%. Most serious growth in corruption in this area has been recorded in Serbia, rising from 2% in 2022 to 10% in 2023, and in Kosovo* growing from 3% in 2022 to 13% in 2023.

Furthermore, petty corruptive acts in dealing with the **health care system** (medical and health care services in 22), have risen too, from 20% as reported in 2022 to 31% claimed in 2023. Very significant rise has been observed in Kosovo*, from 5% in 2022 to 33% in 2023, in Montenegro from 14% in 2022 to 27% in 2023, and in Serbia from 8% in 2022 to 35% in 2023. Respondents of the Western Balkans region perceive significant increase in corruption in dealing with officials in the educational sector (Q 49.13), where levels have more than doubled in 2023 in comparison to 2022 (13% and 6% respectively). The biggest increase has been observed in Kosovo*, from 1% in 2022 to 14% in 2023, in North Macedonia from 3% in 2022 to 8% in 2023, and Serbia from 3% in 2022 to 15% in 2023. There is a small growth in the claimed petty corruption dealing with the courts (tribunal) rising from 7% in 2022 to 10% in 2023 in the Western Balkans region (Q 49.3), but sharply rising in Kosovo* from 3% in 2022 to 14% in 2023.

In the Western Balkans region, **Serbia and Kosovo*** have a **dramatic increase** in the perceived corruption in the categories where one could compare the 2023 respondents' views to those expressed in 2022, regarding petty corruption in dealings with the police, courts (tribunals), tax authorities, officials issuing building permits (in 2022 land services), health care system (medical and health care services in 22), and education sector. There is a clear indicator that petty corruption is a growing trend for respondents of these two economies. The problem is not so acute in the other economies of the region.

Table 4. Rise of reported corruption 2022-2023 in economies per category

Economy	Police	Courts	Tax authorities	Building permits authorities	Health care system	Education sector
Kosovo*	24%	11%	10%	11%	28%	13%
Serbia	14%	6%	8%	9%	27%	12%
Albania	1%	-4%	2%	11%	-7%	3%
North Macedonia	1%	5%	4%	5%	2%	5%
Bosnia and Herzegovina	2%	1%	4%	5%	4%	5%
Montenegro	5%	0%	2%	4%	13%	3%
Region	8%	3%	5%	7%	11%	7%

Respondents of the Western Balkans **do not approve** petty corruption. Answering the questions whether it is acceptable to give money to public administration for public services, very few of them believe it to be so. Thus, just 26% support this, answering that it is always or sometimes acceptable while 68% claim it is never acceptable. There are very little differences across the economies. Albania respondents are mostly tolerant to the practice with total 39% responding that it is acceptable (always or sometimes acceptable) and 60% answering that it is never acceptable.

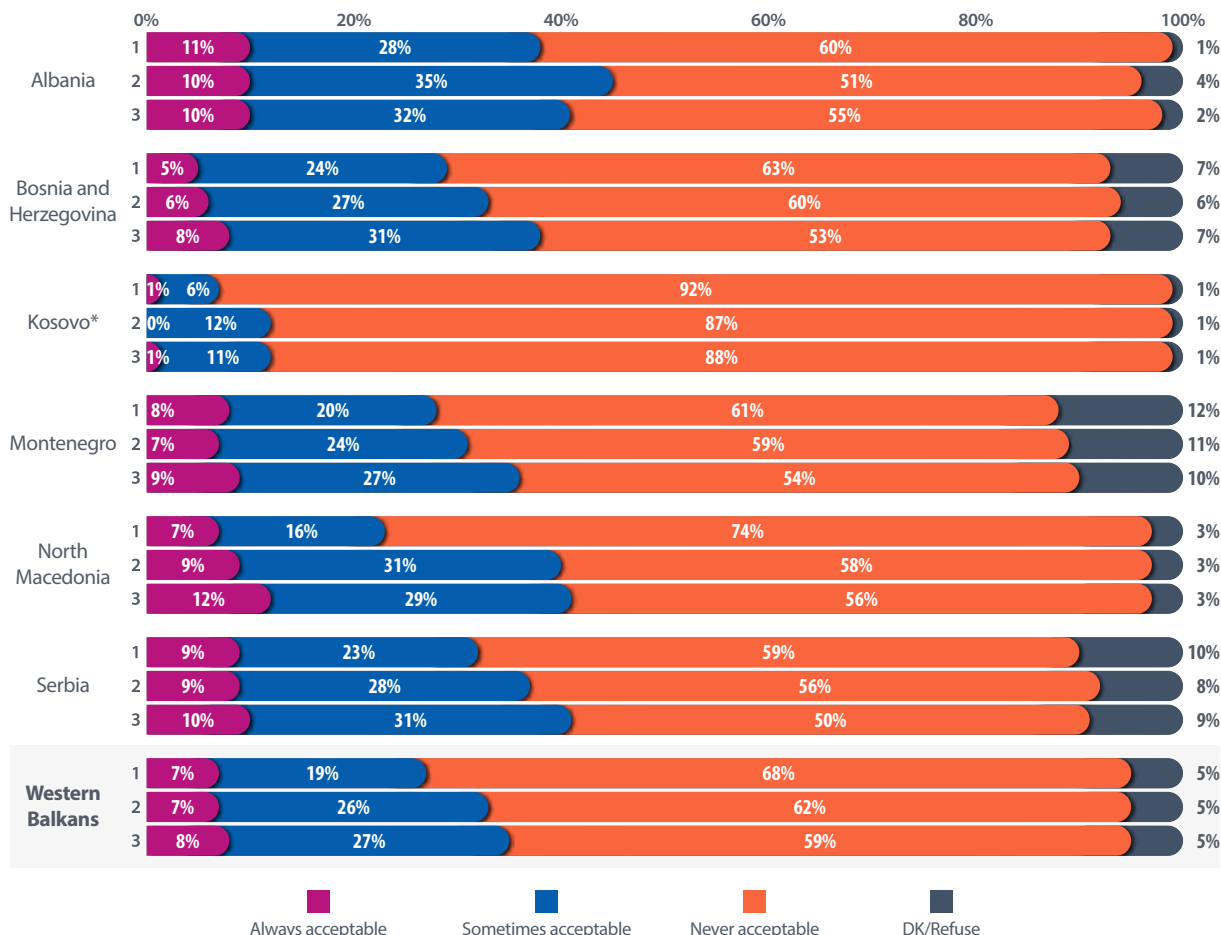
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Figure 47. Opinion on the need to give money/gift or favour to the public administration

Talking more generally, if you wanted to get something from the public administration or a public service, to what extent do you think it is acceptable to do any of the following?

1) To give money 2) To give a gift 3) To do a favour

(All respondents, N=6023, single answer, scale from 1 to 3, share of total, %)

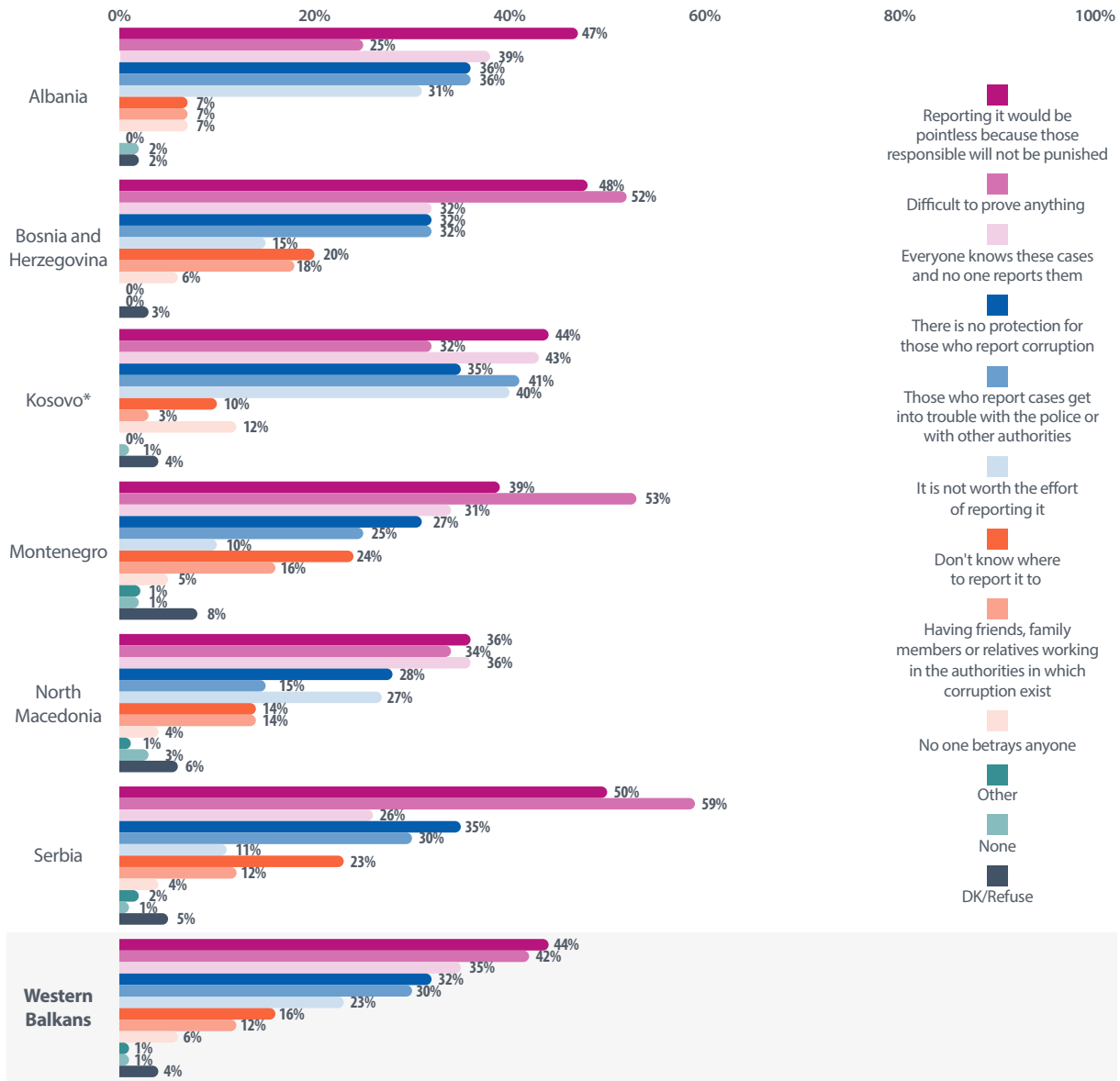


Corruption is possible when societies are more tolerant to this practice and the relevant authorities do not fight it. Impunity is perceived as the main culprit for not reporting corruption as many respondents are aware of the reporting mechanisms (only 16% do not know), but majority (44%) believe those responsible would go unpunished. Impunity towards corruption and any other illegal acts is an enemy to marking progress in establishing and maintaining the rule of law. While legislation exists, and citizens are aware they have to report and where to report, there is still reluctance due to the lack of trust in institutions. Impunity could also explain why a considerable percentage of citizens from the region accepts to engage in petty corruption. A combination of impunity with perceptions of widespread corruption and ineffective institutions largely explains respondents' engagement with petty corruption in order to receive public services, a means of last resort.

Figure 48. Reasons for people who decide not to report corruption

Below are some possible reasons why people may decide not to report a case of corruption. Please tell me 3 (three) which you think are the most important?

(All respondents, N=6023, multiple (max 3) answer, share of total, %)



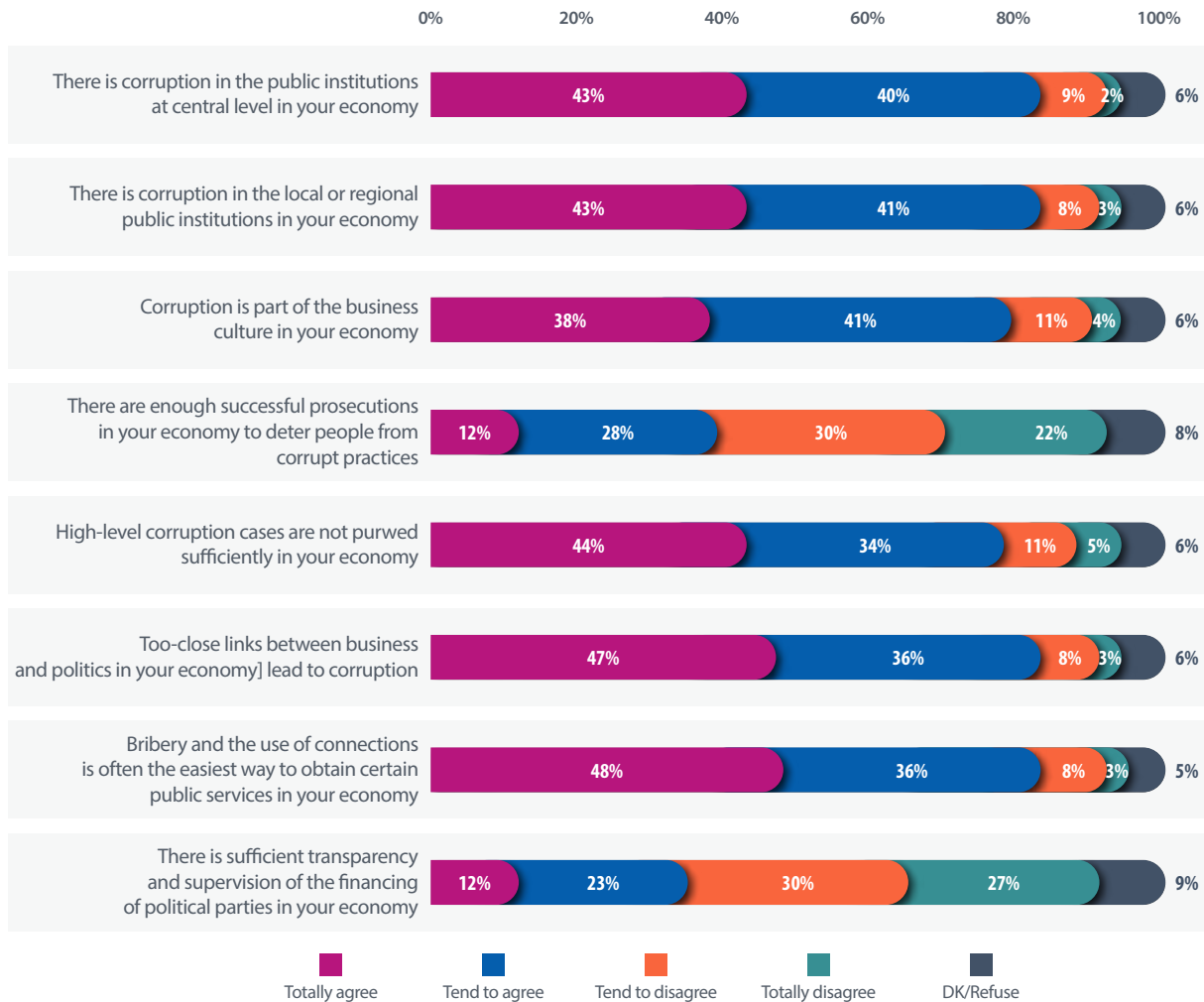
Alarming for the public authorities in the Western Balkans, respondents **do not have faith** in the adequate fight against corruption. They do not believe the investigators, prosecutors and the juridical system have dealt well with **previous corruptive practices**. Respondents in the region do not agree that “there are enough successful prosecutions to deter people from corrupt practices”, where 52% totally or tend to disagree, from the highest 64% in Serbia to the lowest 43% in Montenegro. There is a balance of views in Montenegro; those who agree and disagree with the proposition are in the same percentage, 43%. Although the perception in Albania is more balanced (48% disagree and 45% agree), still the majority of Albanian respondents do not believe there were successful prosecutions of corruptions. In all other economies there is a majority of non-believers, in Kosovo* 56% vs. 45%, in Bosnia and Herzegovina 54% vs. 39%, in North Macedonia 49% vs 45%, and in Serbia 64% vs 24%. Evidently, the faith of respondents in Serbia in their institutions to properly tackle corruption is very low. Even more disturbing is the fact that respondents in the region believe that **high-level corruption cases** are not

pursued sufficiently. A strong majority (78%) in the Western Balkans either totally agree or tend to agree with that statement. The strongest agreement (82%) exists amongst respondents in North Macedonian, and even in Serbia, where there is the lowest agreement with the statement (78%) amongst the economies of the Western Balkans region, the percentage is very high.

Figure 49. Opinion on the most corrupted institutions

Please tell me whether you agree or disagree with each of the following? – Results for the Western Balkans region

(All respondents, N=6023, single answer, scale from 1 to 4, share of total, %)



Respondents in the Western Balkans strongly believe that there is a damaging linkage between **politics and business** in their economies. A great majority of respondents in the region (83%) fully or tend to agree that there are “too-close links between business and politics that lead to corruption”. By and large, the perception of respondents is that what is being referred to as grand rather than petty corruption- a serious problem in the democratic functioning of the economies is constant. That corruption is seen as a **phenomenon of a large scale becomes** evident when analysing the views of the respondents to the statement that “there is corruption in the public institutions at central level”. Those who fully or tend to agree are 83% in the region, from the highest 86% in North Macedonia to the lowest 78% in Montenegro. Respondents also feel corruption exists in local and regional public institutions (84%), from the highest 86% in Kosovo*, to the lowest 78% in Montenegro. Even more worrying is the respondents’ perception that “corruption is part of the business culture”, 79% of them agreeing with the statement, from the highest 82% in North Macedonia to the lowest 75% in Montenegro.

Conclusion

Large majority of respondents of the region stated that corruption in the Western Balkans is widespread. Even more troubling is that region's respondents believe that "in the past three years, the level of corruption in the economies" has grown. Western Balkan residents believe that "bribery and the use of connections is often the easiest way to obtain certain public services". There is a sense that **petty corruption is most widespread in healthcare**. However, for the categories where one could compare the 2023 respondents' views to those expressed in 2022, regarding **petty corruption** in dealings with the police, courts (tribunals), tax authorities, officials issuing building permits, health care system, and education sector, it is worrisome that the percentages **have grown**, in some cases significantly. In particular, **Serbia and Kosovo*** have witnessed a **dramatic increase** in the reported corruption in the categories where one could compare the 2023 respondents' views to those expressed in 2022. A majority of respondents of the Western Balkans **do not approve** petty corruption but they engage in it as a means of last resort.

Respondents of the region are aware **where to report corruption**. However, alarmingly almost half of the Western Balkan respondents decide **not to report a case** of corruption because they believe that "reporting it would be pointless because those responsible will not be punished". The faith in public institutions dealing with corruption is not high in the region. Western Balkan respondents do not believe the investigators, prosecutors and the juridical system have dealt well with **previous corruptive practices**, neither that **high-level corruption cases** are pursued sufficiently.

The survey confirms that citizens' perception reflects what many reports and papers have argued for the state of corruption in the region. While petty corruption remains an issue, residents of all economies in the region suffer from high-level corruption, with political interference and the lack of juridical processes and convictions being the main problem.

I. War in Ukraine

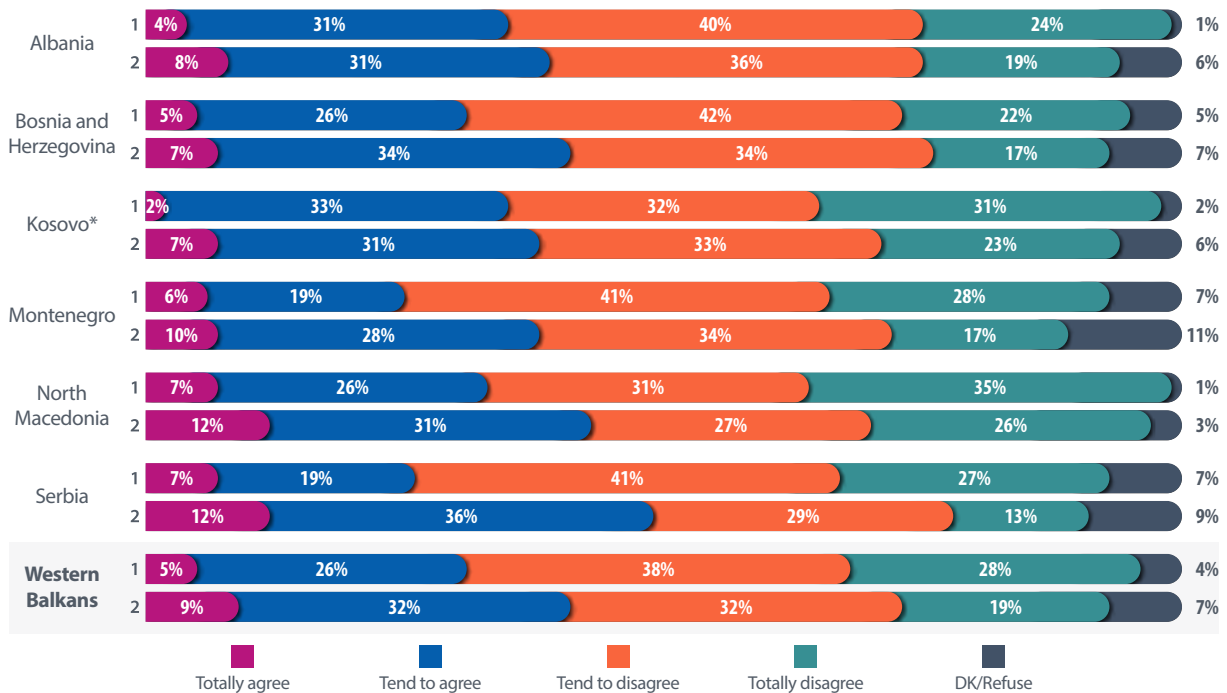
The conflict in Ukraine has had far-reaching consequences on the global economy, including its impact on the Western Balkans region, as evidenced by the following findings. One in three respondents feels more insecure in their economy since the start of the war in Ukraine, with the feeling of insecurity increasing at the prospect of a prolonged war.

Figure 50. Opinion on security due to war in Ukraine

Please tell me whether you agree or disagree with each of the following?

1) I feel insecure in my economy after the war in Ukraine 2) The security of my economy will be more threatened if the war in Ukraine continues in the future

(All respondents, N=6023, single answer, scale from 1 to 3, share of total, %)



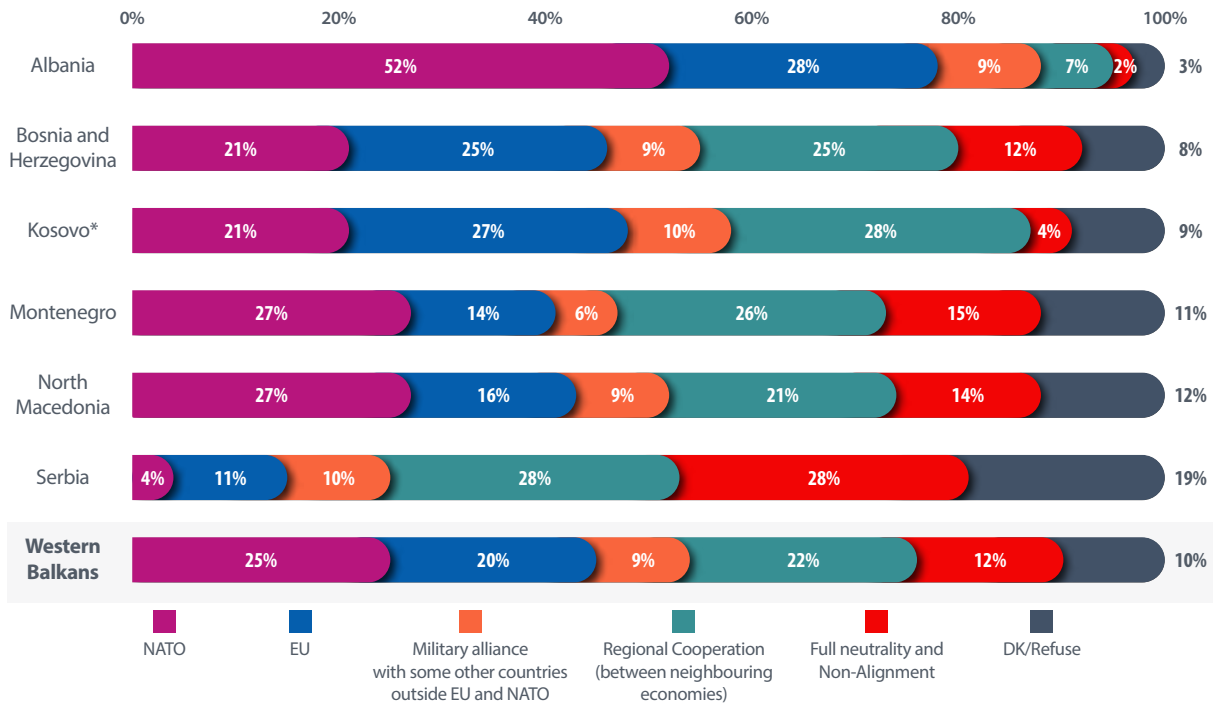
Taking a closer look at individual economies within the Western Balkans, distinct patterns emerge. In Albania, 39% of respondents express agreement with the statement, highlighting a prevailing sentiment that the continuation of the Ukrainian conflict poses a potential threat to their economic stability. Similarly, in Kosovo* and Montenegro, 38% of participants share this viewpoint, underlining the shared concerns within these economies.

Interestingly, the survey reveals that the greatest fear regarding the impact of the Ukrainian conflict on the economy lies within Serbia. A substantial portion of respondents in Serbia, more than in any other economy surveyed, hold the belief that the continuation of the war in Ukraine will pose a significant threat to their economic stability with 49% of respondents agreeing with this statement.

Figure 51. Opinion on the most important security cooperation mechanism

Which security cooperation mechanism do you think is the most important for addressing the current security challenges of your economy?

(All respondents, N=6023, single answer, share of total, %)



When exploring the crucial security cooperation mechanisms necessary to tackle the prevailing security challenges faced by their economies, participants were asked to identify the most significant approach. The findings reveal a diverse range of perspectives amongst the respondents. Out of those surveyed, 25% highlighted NATO as the primary security cooperation mechanism, while 22% emphasised the importance of regional cooperation amongst the neighbouring economies. Additionally, 20% recognised the European Union (EU) as a vital contributor to addressing economic challenges, while 12% advocated for full neutrality and non-alignment. Only 9% expressed support for a military alliance with other economies.

An in-depth analysis of the data indicates that the preference for NATO as the dominant security cooperation mechanism is particularly pronounced in Albania, with 52% of respondents endorsing it. This is expected keeping in mind Albania’s membership in NATO, the perceived benefits and its generally enthusiastic population in regard to EU integration. Albania’s strong endorsement of the EU and NATO could strengthen those organisations’ influence in the region. Conversely, Serbia exhibited the lowest level of support for NATO, with a mere 4% of respondents favouring this option, which could be explained by Serbian’s preference for military neutrality connected with historical and political reasons.

Similarly, the EU’s perceived significance in addressing security challenges varies across economies. Albania emerged as the strongest advocate for EU cooperation, due to the recent opening of accession negotiations, with 28% of participants expressing support, closely followed by Kosovo* with 27%. Conversely, Serbia and Montenegro demonstrated lower levels of endorsement, with 11% and 14% respectively. Higher scepticism of NATO and EU by Serbian respondents, while not surprising and in line with surveys and studies over the years, presents a challenge for the region as it shows lack of unified position on two important actors.

According to the Report of European Commission⁴¹, Serbia's alignment rate with relevant High Representative declarations on behalf of the EU and Council decisions therefore dropped from 64% in 2021 to 45% in August 2022. Serbia is expected to fulfil its commitment and progressively align with the EU Common Foreign and Security Policy, including with EU restrictive measures.

Regarding full neutrality and non-alignment, it is unsurprising that Serbia demonstrated the highest level of support at 28%. Given its policy of military neutrality, this aligns with Serbia's strategic approach. Conversely, only 2% of respondents in Albania considered full neutrality as a viable mechanism for addressing security challenges, while the figure was slightly higher at 4% in Kosovo*, also expected considering the past events and how military intervention impacted some of the economies in the region.

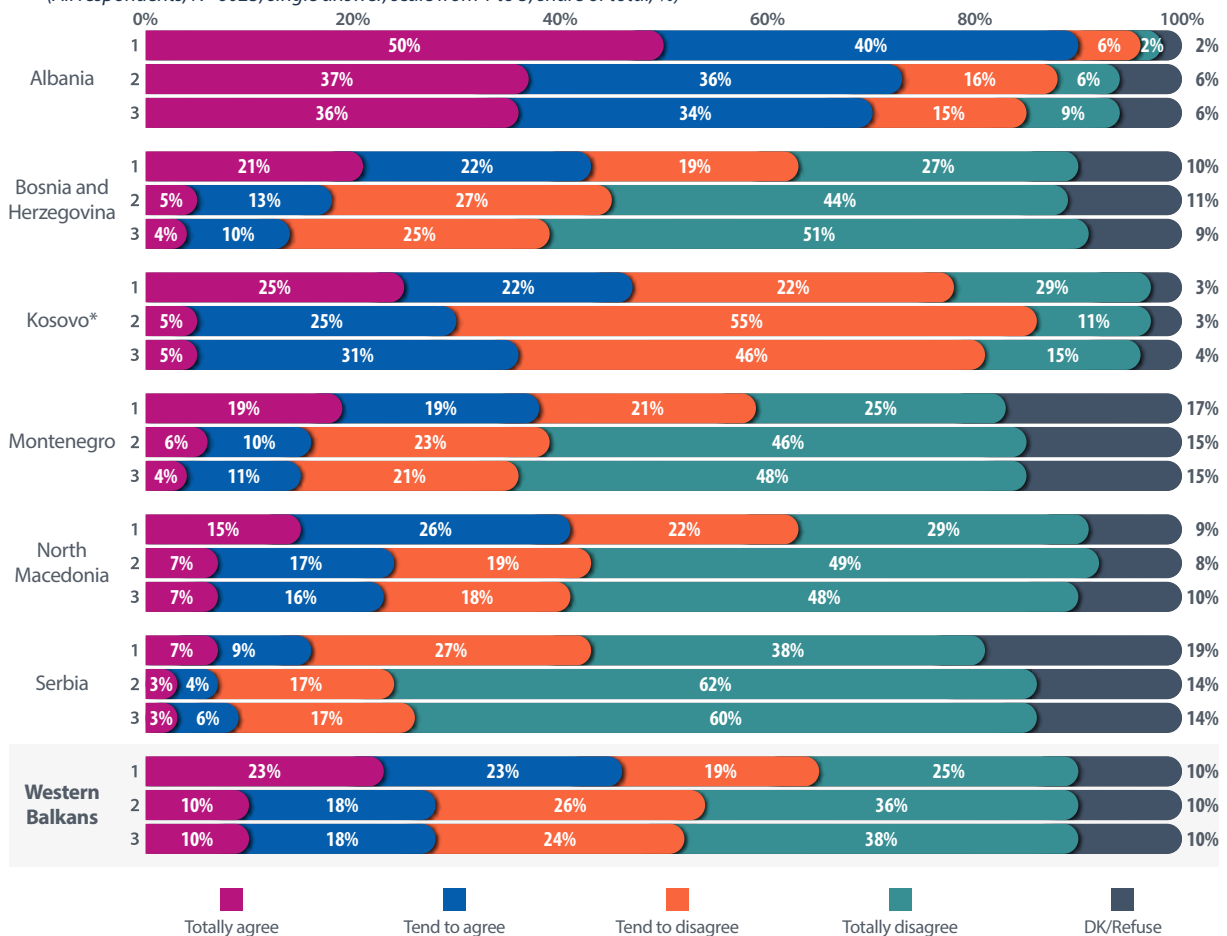
These insightful findings underscore the complex landscape of security cooperation mechanisms preferred by respondents when addressing the existing security challenges within their respective economies. The diverse perspectives revealed by the survey highlight the importance of understanding and considering a range of approaches to effectively address security concerns and ensure economic stability.

Figure 52. Opinion on the support given to Ukraine

To what extent do you agree or disagree with the following statements regarding the support that your economy may provide to Ukraine?

1) My economy should join / continue to enforce all the economic and trade-related sanctions adopted by the EU against Russia over the war in Ukraine. 2) My economy should export and donate weapons including heavy weaponry to Ukraine to help it defend. 3) My economy should allow civilians who want to join Ukrainian army to fight the war in Ukraine.

(All respondents, N=6023, single answer, scale from 1 to 3, share of total, %)



41 European Commission – Countries insights. August 31, 2023.

Online: https://ec.europa.eu/commission/presscorner/detail/en/country_22_6089

When participants were asked to express their agreement or disagreement with the statement “my economy should join/continue to enforce all the economic and trade-related sanctions adopted by the EU against Russia over the war in Ukraine”, varying perspectives emerged.

The data revealed that Albania displayed the highest level of support, with an overwhelming 90% of respondents favouring the idea of their economy joining or continuing to enforce the economic and trade-related sanctions imposed by the EU against Russia in response to the war in Ukraine. On the other hand, Serbia exhibited the lowest level of support, with only 16% of respondents expressing agreement with the statement.

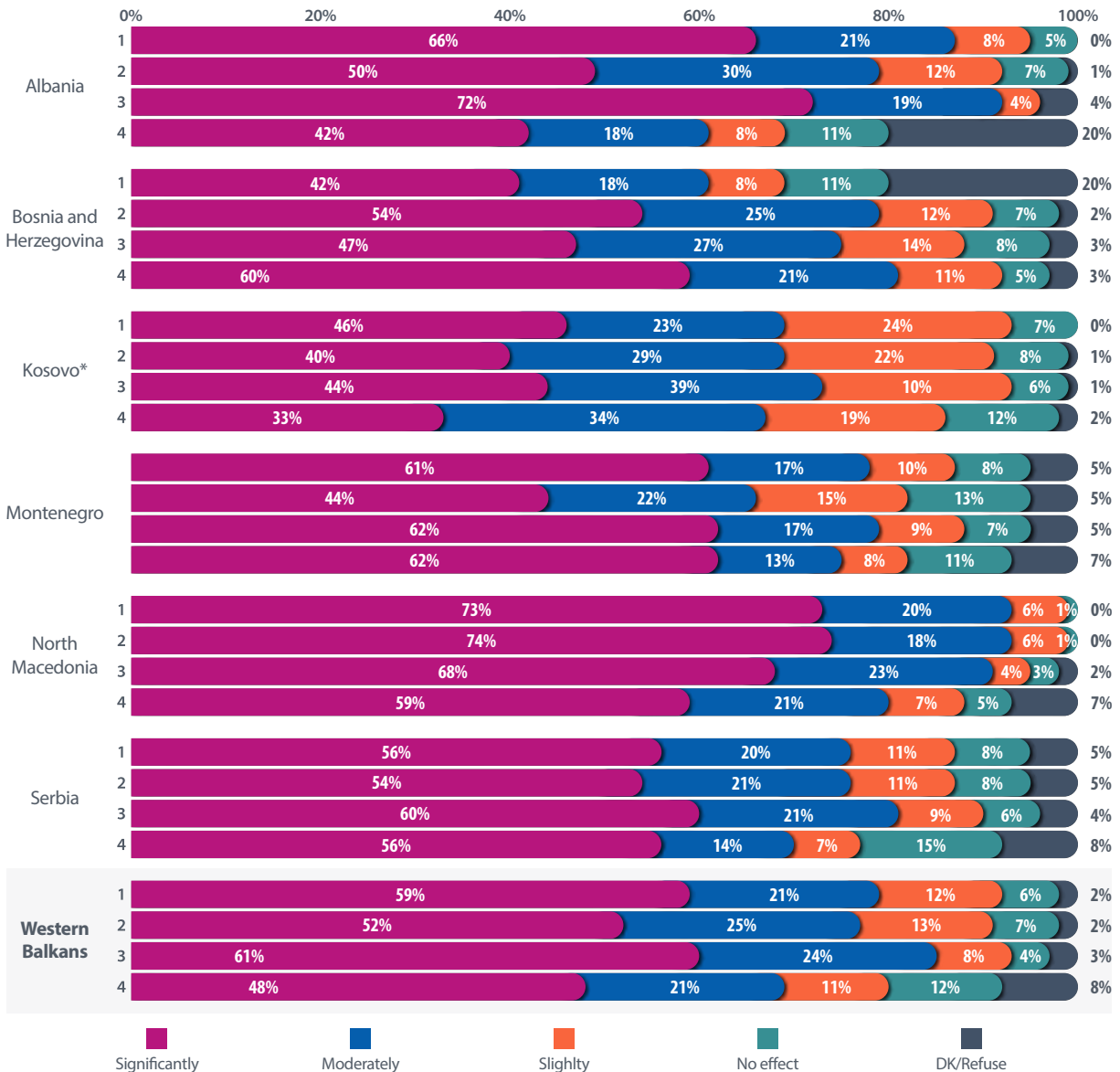
In Serbia, an overwhelming 79% of respondents were opposed to the idea of exporting and donating weapons, including heavy weaponry, to Ukraine for self-defence purposes. Conversely, Albania exhibited the lowest level of disagreement, with 21% of respondents expressing opposition to this idea.

Figure 53. How your household's purchasing power is affected by the war in Ukraine

To what extent has the war in Ukraine affected your household's purchasing power regarding following the categories:

- 1) Basic food stuff such as milk, eggs, bread, and meat.
- 2) Energy products or electricity for heating and cooling of your home.
- 3) Fuel for transport.
- 4) Affordability of housing (rents or mortgage prices).

(All respondents, N=6023, single answer, scale from 1 to 3, share of total, %)



There is an overwhelming feeling that the war in Ukraine has impacted households directly in the region. Food and fuel prices seem to be hit the hardest according to the region's respondents, most notably in North Macedonia. While still high, the impact is lower on affordability of housing and energy products. The 2022 data showed that the economic impact of the crisis in Ukraine is negatively affecting economies of the region, with a more immediate impact compared to the 2008 economic crisis and the pandemic later on. The extent to which the crisis will affect the economy of the Western Balkans will depend on the duration of the crisis, import of energy and further inflationary pressures. Although the macroeconomic situation at the end of February 2022 was sustainable, all economies are facing great uncertainty regarding the further operation of their economies, especially due to the daily rise in prices of leading stock products, interruptions in supply chains and inability to plan activities for the next period. The main risk is a further increase in energy, natural gas and oil prices, to which all economies are exposed, and which affects the growth of inflation. High prices of fertilizers also affect the rise in prices of agricultural and food products.⁴²

42 Chamber Investment Forum. 2022. The impact of the Ukrainian crisis on the economy of the Western Balkans.
Online: <https://www.wb6cif.eu/2022/03/29/the-impact-of-the-ukrainian-crisis-on-the-economy-of-the-western-balkans/>

General Conclusions

The data underscores the widespread impact of the conflict in Ukraine on the global economy, with the Western Balkans region being no exception. While a majority of the population remains confident in their economies, a significant portion expresses concerns about the potential threats posed by the ongoing war in Ukraine. What stands out in this survey is that a significant portion of respondents in Serbia, more than in any other economy surveyed, believe that the continuation of the war in Ukraine will pose a significant threat to their economic stability which indicates a heightened sense of fear and apprehension about the potential repercussions of the conflict on Serbia's economy.

Overall, there are significant differences in opinion across the Western Balkans region concerning actions related to the war in Ukraine. Albania tends to display higher support or lower disagreement with certain measures, while Serbia consistently exhibits lower support or higher disagreement. Close relations with foreign actors, besides the EU, could be explained by the region's perception of the EU, which can sometimes be unfavourable, particularly in the case of Serbia which is visible in [SecuriMeter 2023](#). One of the reasons of this perception could be the current state of its enlargement policy. These findings highlight the complexity of geopolitical dynamics and the sensitivities surrounding the conflict in Ukraine.

The data underscores the intricacies and varying viewpoints within the Western Balkans region concerning security cooperation mechanisms. The results stress the significance of comprehending each economy's distinct security priorities and the requirement for subtle strategies in tackling security challenges to foster regional stability and economic advancement. Interestingly, Serbia and Kosovo* stand out with the highest levels of support for regional cooperation. This indicates a recognition of the potential benefits of working together with neighbouring economies to tackle security challenges in the region. When we look at EU cooperation, the level of support varied across economies. Albania emerged as the strongest advocate for EU cooperation, followed by Kosovo*. However, Serbia and Montenegro showed lower levels of endorsement. This disparity suggests differing perceptions and priorities regarding the EU's effectiveness in addressing security challenges. It is unsurprising that Serbia demonstrated the highest level of support for full neutrality and non-alignment. Serbia has a long-standing policy of military neutrality, and this data aligns with its strategic approach.

Regional instability, disruptions in trade, and changes in energy prices, amongst other factors, can create economic uncertainties and influence household purchasing power in goods and services. This data highlights the economic challenges faced by the Western Balkans region, particularly concerning rising prices of essential goods and services, as well as the varying degrees of insecurity experienced by the population after the war in Ukraine. To effectively safeguard the less privileged and foster economic growth, policymakers must acknowledge the varying inflation rates experienced by different household types. By taking this variability into account, they can design targeted policies that support those in need and promote overall economic prosperity.

Methodology

The methodology that was used for the Public Opinion Survey was quantitative research with computer assisted interviewing data collection method. The data was collected by trained interviewers from Indago-led regional consortium of research companies in the period from 14 May to 2 June 2023 in Albania, Bosnia and Herzegovina, Kosovo*, North Macedonia, Montenegro and Serbia.

As part of the project set-up phase, some preparations and adjustments were undertaken as necessary for the successful implementation of the survey:

Questionnaire

The initial draft questionnaire was provided by RCC and reviewed by Indago. The questionnaire of 59 questions with around 200 variables in total and with additional demographic questions was originally written in English and subsequently translated into related local languages by Indago. Since the computer-assisted method of data collection was used in the research, all questionnaires were programmed/converted to a digital form to include all the scripting and interviewers' instructions.

Training of Interviewers

The surveys were conducted by experienced interviewers in all economies. All the interviewers were given detailed instructions containing general description of the project objective, the questionnaire, and of the method of selecting the respondents. In addition, project coordinators/economy team leaders reviewed the programmed questionnaires jointly with the interviewers and emphasised all important elements (especially the need to read the individual answers where one or more answers were possible, etc.).

Sample

Public Opinion Survey was conducted amongst minimum N=1000 respondents in each of 6 (six) economies, aged 18+, with the total sample size of N=6023 respondents for the entire Western Balkans region.

The target respondents were persons:

- aged 18 or older who reside in private households,
- whose usual place of residence is in the territory of the economies included in the survey,
- who speak the local language(s) well enough to respond to the questionnaire.

Table 5. Sample structure by region

Economy	Region	%	Economy	Region	%
Albania	Berat	4.1%	Kosovo*	Prizren	18.8%
	Dibër	3.9%		Gjakovë	11.4%
	Durrës	10.4%		Prishtinë	27.7%
	Elbasan	9.3%	Montenegro	North	22.0%
	Fier	10.0%		Centre	52.0%
	Gjirokastrë	2.0%		South	26.0%
	Korçë	7.1%	North Macedonia	Vardar	8.0%
	Kukës	2.6%		East	9.0%
	Lezhë	4.2%		Southwest	8.0%
	Shkodër	6.9%		Southeast	10.0%
	Tiranë	32.9%		Pelagonia	12.0%
Vlorë	6.6%	Polog		13.0%	
Bosnia and Herzegovina	Federacija BiH	62.1%		Northeast	8.0%
	Republika Srpska	35.5%		Skopje	32.0%
	Brčko Distrikt	2.4%		Serbia	Belgrade
Kosovo*	Ferizaj	10.5%			South and East Serbia
	Gjilan	10.6%	Central and West Serbia		28.3%
	Peja	10.1%	Vojvodina		26.1%
	Mitrovica	11.0%			

Table 6. Distribution of respondents according to each economy of the Western Balkans

Economy	Region	%	Economy	Region	%
North Macedonia	Vardar	7.9%	Montenegro	North	28.3%
	East	9.3%		Centre	47.2%
	Southwest	10.5%		South	24.5%
	Southeast	8.6%	Serbia	Belgrade	23.2%
	Pelagonia	12.4%		South and East Serbia	21.8%
	Polog	13.9%		Central and West Serbia	28.1%
	Northeast	8.4%		Vojvodina	26.8%
	Skopje	29.0%			

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Figure 54. Sample structure by gender⁴³

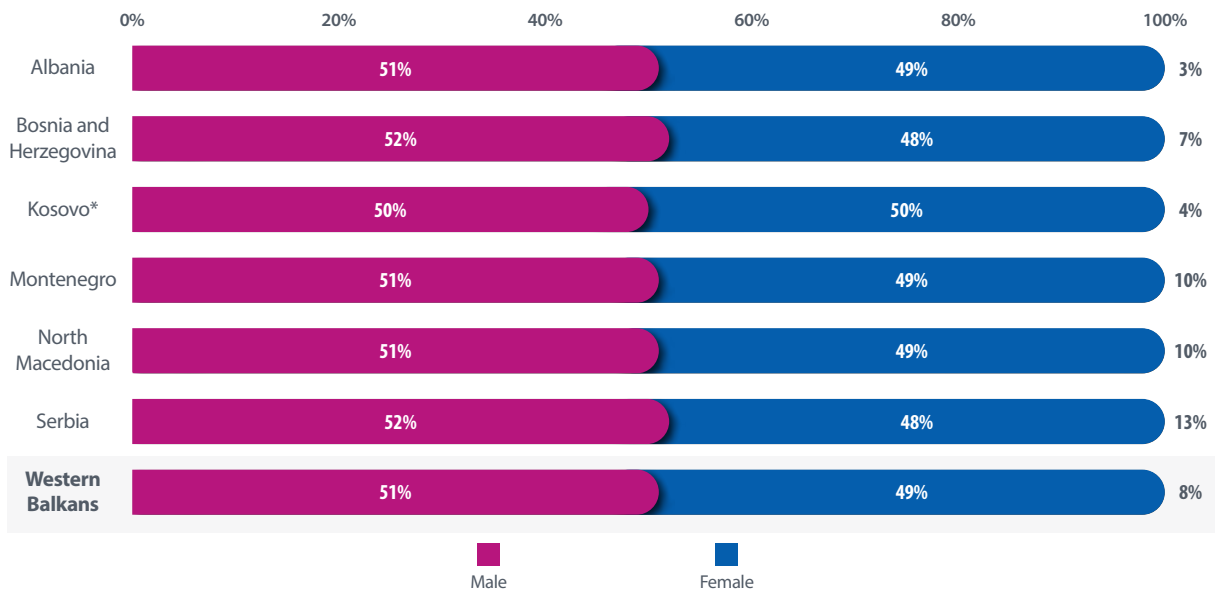
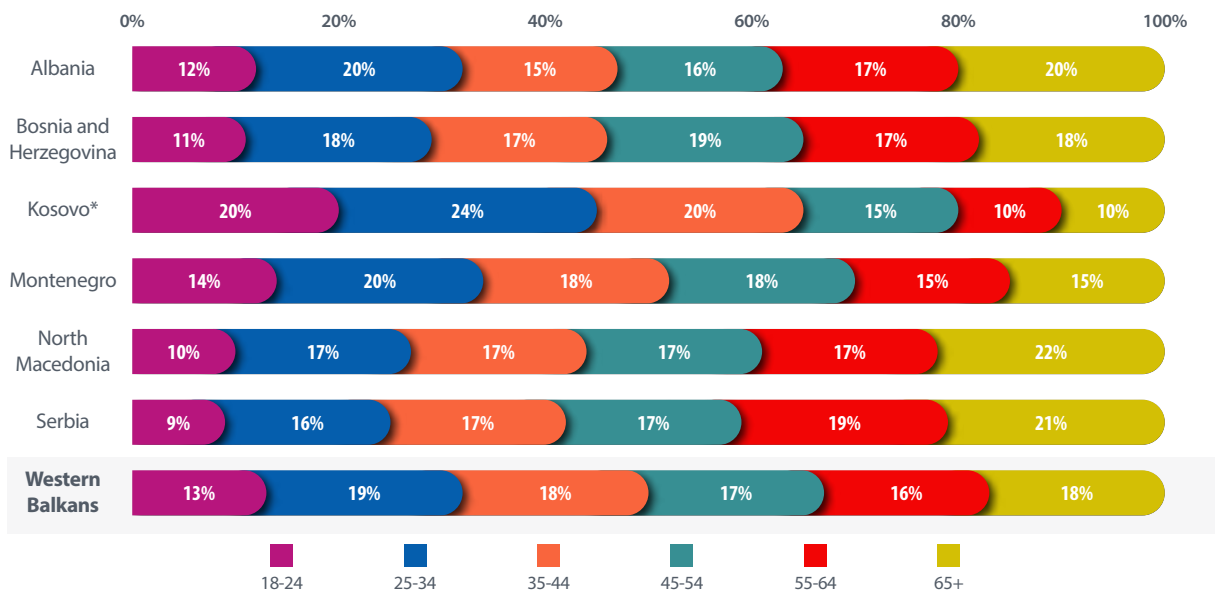


Figure 55. Sample structure by age⁴⁴



43 The figures might not add to 100% due to rounding.

44 The figures might not add to 100% due to rounding.

Figure 56. Sample structure by education⁴⁵

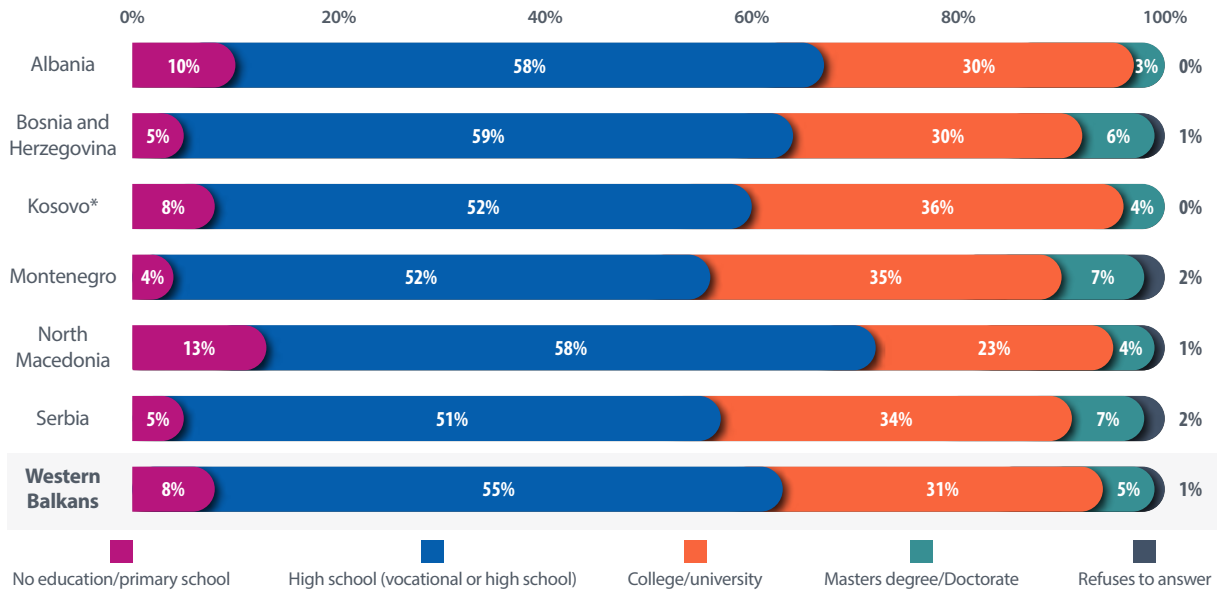
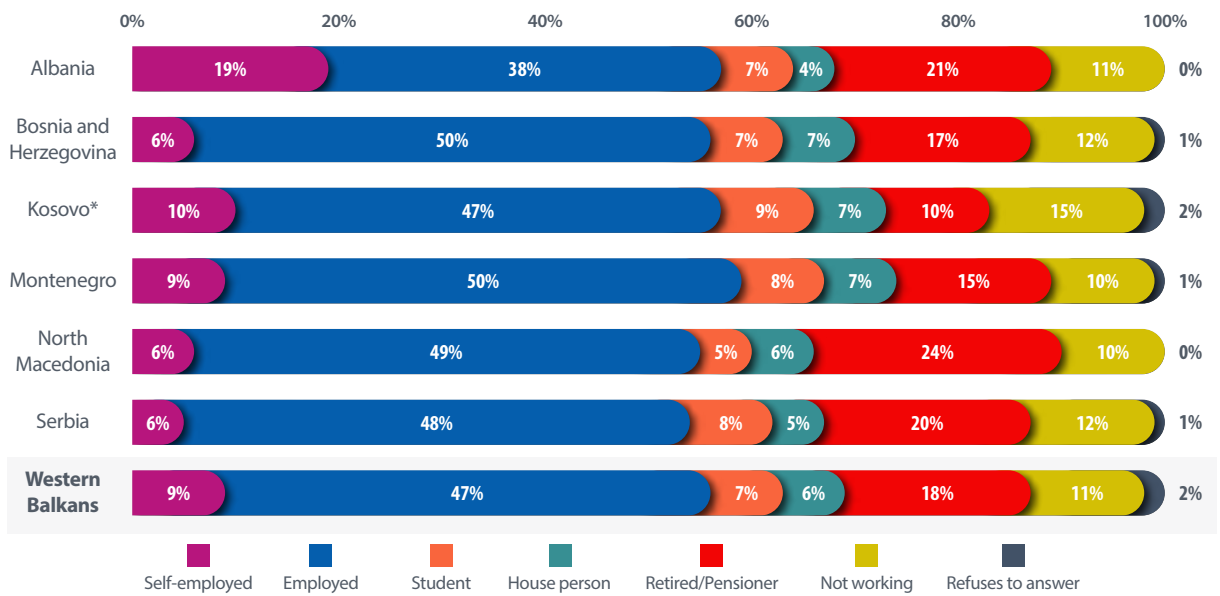


Figure 57. Sample structure by working status⁴⁶

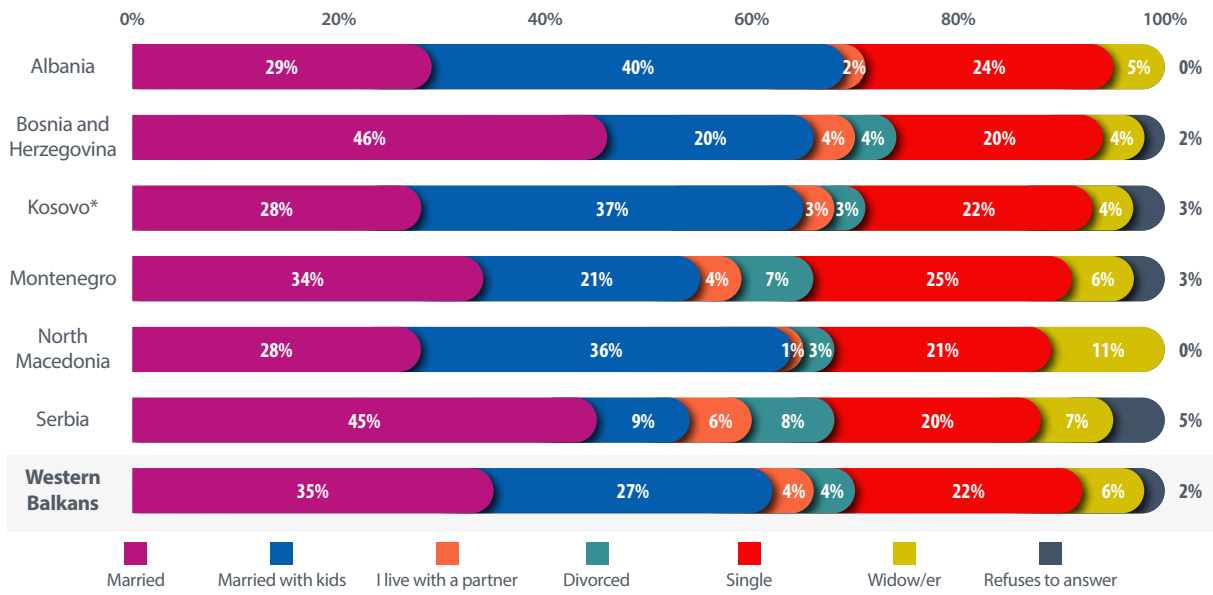


45 The figures might not add to 100% due to rounding.

46 The figures might not add to 100% due to rounding.

**ATTITUDES TOWARDS SECURITY:
PERCEPTIONS OF SECURITY AND THREATS IN THE WESTERN BALKANS⁴⁷**

Figure 58. Sample structure by marital status⁴⁷



⁴⁷ The figures might not add to 100% due to rounding.

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