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Insights and Perceptions: Voices of the Balkans

in partnership with the

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2010 Summary of Findings

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DEJAN ČABRILLO

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Introduction: The “New Normal” in the Balkans

Imagine – on a rainy election day, in an unnamed country that could be anywhere, almost three-quarters of the voting papers are returned blank. The government demands that the elections are re-held, when the sun is shining: the protest increases with 83% of the electorate voting without choosing a candidate. That is the start of Jose Saramago’s novel “Seeing” – an anti-utopian vision of post-political democracies where people are angry, the elite are conspiracy-minded and insecure, and where social life is paralyzed.

Reading the results of the latest *Balkan Monitor* Poll, the parallel with Saramago’s parable is striking: one has the feeling that Saramago’s anywhere is the Balkans’ everywhere. In “Seeing”, people vote by rejecting all choices; in the Balkans, they speak loudly in favour of any organisation that is not linked to their government. The survey shows that citizens of the Balkan democracies believe in the Church, the EU and the UN, but deeply distrust the institutions that govern them.

After two decades of wars and painful economic transition, Balkan societies appear mistrustful and pessimistic, and they have emigration on their mind. They want change but are sceptical about their ability to influence the outcome. The people have overcome some fears but no longer have any illusions. They prefer to retreat into their private lives rather than engage with politics. The vast majority of Serbs, Croats, Macedonians and citizens of Bosnia and Herzegovina say that no political party or politician expresses their views. When asked to say who they trust, most citizens have little faith in national institutions – just like Saramago’s faceless citizens, who voted by rejecting all choices.

Ten years after the last war in the region, the Balkans still represent a collection of frustrated protectorates and weak states. Bosnia and Kosovo are trapped in the labyrinth of the politics of semi-independence; Albania, Montenegro and Macedonia are small and claustrophobic republics modelled on Berlusconi’s Italy, where the governments are populist and to an extent popular, and where the opposition is discouraged and discouraging at the same time. Serbia has been shocked not only by the loss of Kosovo but also by the absence of public outrage when the territory – often seen as a symbol of

Serbian patriotism – was lost (a well-known Serbian journalist told me recently that putting Kosovo on the cover page was the best way to lose readers). Then we have Croatia, where its people are split in their judgment as to whether joining the EU is actually a good or a bad thing. What many Croats and Serbs agree on is that paying taxes is a waste of money.¹ And when it comes to economic hopes, it is depressing to read that the majority of unemployed, in all countries with the exception of Serbia, fear that they will not be able to find a job in the next 12 months.

But if we look beyond the striking number of people who distrust governments and judicial systems, beyond the number of those who see corruption rising and solidarity in decline, you will see that people tend to be happier than expected and more ready to trust a stranger than you would ever dared to have hoped. What you will see is the outline of a “new normal” in the Balkans. The citizens of the region are learning to live in dysfunctional states and

1 For *Balkan Monitor* survey results that are not discussed in the Summary of Findings please consult the whole dataset at www.balkan-monitor.eu/index.php/dashboard. The *Balkan Monitor* data dashboard also allows you to break down results by geographical and socio-demographic factors.

badly governed democracies, and they are also learning the art of bearable dissatisfaction.

While the vast majority do not fear that their countries will go back to war (Macedonians are the most concerned about the return of a military conflict), Balkan societies have lost the hope that post-war economic growth and a return to everyday life will easily be restored.

Reading the results of the *Gallup Balkan Monitor*, one could conclude that the EU has lost its magic but has not lost its importance. It is true that faced with the choice of keeping the constitutional name of the country or of compromising with Greece for the benefit of joining the Union, Macedonians are resolutely sticking to their guns. Serbs also say that it is more important to pretend that Kosovo is part of Serbia than to join the EU. But declarations are one thing and reality is another. It is clear that if the citizens of the region have any realistic hope of a better life and political stability, then that has to be related to the prospect of their country joining the EU. And this is even true for Croatia. In the *Balkan Monitor* poll, Croats' euro-scepticism could be seen more as a way for the country to declare its proud European identity than as a real desire to stay outside of the Union.

The contradictory dynamics of the support, in Albania and Kosovo, for the idea of a Greater Albania is the best illustration of how important an EU perspective is for the region. This year, in comparison with 12 months ago, public support for a Greater Albania has dramatically declined in Albania and dramatically increased in Kosovo. The explanation for these contradictory trends is quite obvious – while Albanians expect lifting of the visa restrictions for travel in the EU to take place till the end of the year, only 7% of Kosovars see freer travel coming soon; 38% think it will only come with the international recognition of the country.

However, in a paradoxical way, the Balkans are more a part of Europe than any of the most ardent advocates of EU enlargement can begin to imagine. All the problems that the region faces are European issues and not predominately Balkan ones.

The questions that people in the region ask themselves are not related to the past, they are related to the future. How will Balkan economies grow in post-crisis Europe? How will the multicultural institutions, built after a decade of war and fervent nationalism, be sustained at a time when leading European politicians are heard to say that multiculturalism is dead? How can institutional arrangements, made in order to stop the war, be transformed into an effective guarantee for a common future?

The conspiracy of post-war arrangements, rhetoric about “collective rights”, and economic under-development has eroded some of the initial optimism that swept the region at the beginning of this century. But the real crisis in the Balkans is not simply the dysfunctionality of the existing institutions but is rather inbuilt in the very models that Balkan societies are trying to implement. In the days of the Ohrid Agreement it was popular to tell Macedonians that what the Agreement offered them was the prospect of being another Belgium. Now, one has to ask if Macedonians want their country to become another Belgium, bearing in mind the wasteful and complicated way in which Belgium functions today. Indeed, can anyone promise Macedonians that in the next 10 or 20 years Belgium will not implode?

Focused on their own problems, Europeans do not have time to think about how the crisis in the Union impacts the countries on Europe's periphery. This should change. The Balkan's “new normality” is very much a reflection of Europe's “new normality”.



Ivan Krastev

Chairman
Centre for Liberal Strategies, Sofia
and
Member of the Advisory Board
European Fund for the Balkans

Main findings

LIFE SATISFACTION AND COUNTRY DEVELOPMENT

- In all countries of the Western Balkans, more than half of respondents reported difficulties in being able to manage on their households' income; this share ranged from 52% in Croatia to 78% in Serbia. Compared to 2009, in Serbia, Montenegro, Albania, Kosovo and Bosnia and Herzegovina, more people now reported difficulties in making ends meet. In Kosovo the proportion of respondents with financial difficulties has risen by 19 percentage points to 54%.
- Balkan residents were also rather pessimistic regarding their economies' future developments. Croatia was the only country where respondents were more optimistic than they were a year ago. However, in Croatia as well as other Balkan countries, respondents feeling that the situation was getting worse clearly outnumbered those feeling the opposite. In Bosnia and Herzegovina, Serbia and Croatia, about two-thirds of respondents expected to see a further economic downturn.
- In Macedonia and Serbia, positive signals were registered concerning the job market. The shares of unemployed respondents who were optimistic about finding a new job within the 12 months following the survey rose by eight percentage points in Macedonia to 24% and by six points in Serbia to 45%.

ATTITUDES TOWARD THE EU

- Granting visa-free travel to Montenegrins, Macedonians and Serbs did not automatically



DEJAN ČABRILLO

Novi Sad, Serbia

translate into higher levels of EU support in all of those countries. While in Montenegro the proportion of respondents saying that the EU was a *good thing* increased by six percentage points to 73%, in Macedonia and Serbia the respective shares fell from 62% to 60% and from 50% to 44%. Support for the EU also dropped by five points in Croatia to 28%.

- As in 2009, the current survey showed that in all Balkan countries, except Croatia, majorities of respondents would vote in favour of their country joining the EU; proportions ranged from 63% in Serbia to 93% in Albania. In Croatia, those who would vote against their country's accession outnumbered those who would vote 'Yes' (43% and 38%, respectively).
- In most countries, majorities felt that EU citizens wanted their countries to join the Union – except in Serbia, where the share of people feeling that they would be welcomed in the EU has dropped from 53% to 41% in the past year. In all countries except in Serbia and Kosovo, increasing levels of respondents believed that

EU citizens would appreciate their countries' accession to the Union.

- Respondents in Bosnia and Herzegovina have become much more optimistic regarding their country's EU accession date. While in 2009, the average date estimated by interviewees in the country was 2022, Bosnian respondents now, on average, believed that their country might join as early as 2018.

SATISFACTION AND TRUST IN THE REGION'S INSTITUTIONS

- Relative majorities of respondents in Albania, Kosovo and Montenegro were satisfied with their countries' government. In Serbia, Croatia and Bosnia and Herzegovina, respondents were at least three times as likely to disapprove of their countries' government as to be satisfied. Albania was an exception: its citizens' approval of the government has increased strongly by 17 percentage points (to 48%) since 2006.
- The current wave of the *Balkan Monitor* shows that citizens in the Balkan states, except in Serbia, now feel more represented by politicians or a political party than they did previously. Albanian respondents were the most likely to feel represented politically (60%), followed by Kosovars (54%) and Montenegrins (46%). In the remaining countries, however, about two-thirds of survey participants still did not feel sufficiently represented by their politicians.
- Religion is gaining importance for most ethnic groups in the Western Balkans. The only groups that placed less importance on religion were Macedonian nationals and Bosniaks in Bosnia and Herzegovina.

CORRUPTION AND ORGANISED CRIME

- Majorities in all Balkan states believed that corruption in government and businesses was

widespread. In Kosovo, interviewees were most likely to believe that the level of corruption in government was high (91%); Montenegrins were the least likely to say this (50%, no change). The biggest difference in the past 12 months was registered in Kosovo, where the proportions of those believing that their government was corrupt rose by eight percentage points.

- Albanians were the least inclined to believe in widespread corruption in the business world (56%, down from 67% in 2009), compared to more than 9 in 10 Croats (93%, up 1 point) who thought that this was common practice in their country.
- A positive development was found concerning the perceived levels of petty corruption. In all Balkan states, with the exception of Croatia (that, however, continues to have among the lowest levels of experienced petty corruption), the share of those respondents who had been confronted with a concrete example of corruption decreased compared to 2009.

MIGRATION AND MOBILITY

- As in earlier survey waves, respondents across the Western Balkans were more prone to see *better opportunities abroad* than at home. Notable developments were registered in Albania and Kosovo, where the numbers seeing better opportunities outside their country have fallen dramatically since 2008: by 25 percentage points in Kosovo (to 48%) and by 12 points in Albania (to 52%). The opposite was seen in Croatia and Montenegro, where the shares of interviewees seeing better chances abroad have increased (since 2008) by 17 points (to 48%) and by 14 points (to 52%), respectively.
- More than 4 in 10 (42%) Albanian respondents would like to move to another country, followed by roughly a third of Macedonians and Kosovars (31%-34%). However, just 14% of

Albanian interviewees with a desire to migrate (or 6% of the total number of respondents) said they had concrete plans to move abroad.

16% in case of the latter country). Meanwhile, in Macedonia, Montenegro and Croatia, people were more inclined, than in 2009, to think that relations were *just about right* and did not need strengthening.

BALKAN CHALLENGES: ETHNIC RELATIONS AND THE FUTURE OF THE REGION

- Most Balkan citizens did not anticipate another armed conflict in the region; proportions of those respondents holding this view varied between 62% in Serbia and 88% in Croatia. A notable change was registered in Bosnia and Herzegovina: since 2009, the share of interviewees thinking that the risk of war was not imminent has increased sharply by 22 percentage points to 49%. Respondents in Macedonia and Serbia were the most likely to say that it was *probable* or *certain* that war would break out in the region (28% and 24%, respectively).
- In Albania and Kosovo, the share of respondents finding neighbourly relations *too strong* has risen significantly in the past year (from 15% to 30% in case of the former and from 6% to 16% in case of the latter country).
- As in the previous wave, the highest shares of respondents advocating more regional cooperation were found in Bosnia and Herzegovina (69%), Serbia (64%) and Macedonia (60%).



DEJAN ČABRILLO

Bijeljina, Bosnia and Herzegovina

Country overview

ALBANIA: WITH THE ECONOMY IN BAD SHAPE, ALBANIANS HAVE FAITH IN THEIR LEADERS AND IN THE EU

In 2010, significantly fewer Albanians said they had received help from abroad compared to last year – the share of respondents who said that they could rely on friends or family outside of the country, when they needed to, has decreased by nine percentage points since 2009 (to 45%). The global economic crisis has also impacted the overall economic situation: a third (34%) of respondents felt that Kosovo's economic situation was getting worse, rising from a quarter (26%) in 2009.

ANDRZEJ PYRKA



Kukës, Albania

Albanian support for the EU remained among the highest in the region at 81%, but that represents a drop of eight percentage points since a year ago. In the case of an EU referendum, however, a vast majority (93%) of Albanians would be ready to vote 'Yes' to accession to the EU – the highest such figure in the Western Balkans. Regarding an accession date, Albanians were among the most optimistic among potential new members in the Balkans – on average, they believed that their

country would join in 2014. Not surprisingly then, they also felt that they would be welcomed by EU citizens; a rising share of Albanian respondents (69%) believed that people in the EU wanted their country to join.

Albanians' support for their leadership has been increasing in past years, in 2010, 48% of Albanian respondents said they approved of their leaders. A parallel development was the increasing proportion of Albanians that felt represented by a party or a politician – currently 60% felt as if someone was speaking on their behalf: the highest rate in the region. NATO and EU remained the most trusted institutions in the country, while the judiciary recently experienced a drop in citizens' confidence and was trusted by 31% of respondents (down by 13 percentage points). The societal role of religion appears to be growing: since 2006, the share of people stating that it played an important part in their lives has risen from 33% to 44%.

Despite a slight decrease, Albania still has the highest rates, by far, of people stating that they had to bribe someone in the year prior to the survey interview: half of respondents (49%) had been in this position. But there have been positive developments: a significant share of Albanians (35%, more than anywhere else in the region) found that the level of organised crime was decreasing and people were increasingly convinced that their government was effectively combating organised crime (40%, up 3 points).

While the share of people seeing better opportunities abroad has dropped, more people than ever before expressed the wish to leave the country. In 2010, 42% said that they would emigrate if the circumstances were right. Only around 6% of Albanian respondents, however, had concrete plans to leave in the year after the interview, which would amount to roughly 135,000 people (based on the survey results being extrapolated to the total Albanian population). Two-fifths of Albanians believed that visa

liberalisation would lead to a strong increase in emigration.

The support for the creation of Greater Albania – a country made up of Albanians from Albania, Kosovo and Macedonia – has decreased while the share of people stating that ties with neighbouring countries were too strong has risen steeply (from 15% to 30% between 2009 and 2010). Nevertheless, an absolute majority of respondents (42%) were convinced that neighbourly ties needed further strengthening.

BOSNIA AND HERZEGOVINA: WITH MORE BOSNIANS STRUGGLING AND THE JOBLESS BEING INCREASINGLY PESSIMISTIC, THERE IS A CALL FOR STRONGER REGIONAL TIES

Material problems seem to be increasing throughout the country with more people stating that they were having problems in managing on their household income (from 58% to 66%, in the past year). The proportion of respondents thinking that economic conditions in the country were getting worse has remained more or less stable (68%, up 2 points) and jobless respondents have grown much more pessimistic about finding a job in the year after the interview: three-quarters (74%) now thought that there was no job in sight (up from 42% in 2009). Despite dissatisfaction with their material situation, the number of people wanting to go abroad was relatively low: 20% of interviewees expressed a wish to leave the country of which 8% (just under 2% of Bosnian respondents) had concrete migration plans.

The share of people thinking that Bosnia's accession to the EU would be a 'good thing' rose (currently at 69% for the whole of Bosnia) with an especially strong increase in the entity of Republika Srpska: while in 2008 31% of respondents in Republika Srpska had thought of EU accession as a 'good thing', the figure went up to 56% in 2010. During the same period, EU support in the Bosnian Federation increased from 59% to 75%. People in both entities were more optimistic about the accession date: in 2009, Bosnian respondents – on average – believed that the country would join in 2022; that date has now moved to 2018.

More people said they disapproved of the national leadership (a change from 67% to 74% since 2009), but at the same time there has been a strongly growing feeling of being better represented by a political party or politician. While in 2009, only 17% had the impression that somebody was representing their political views, that share has increased to 32% in 2010. Religion now plays a more important role in the lives of Bosnian Croats and Bosnian Serbs than in 2006 – while its importance has decreased for Bosniak respondents. While the level of respondents stating that organised crime was affecting their everyday lives has dropped in past years, about half (47%) still believed that its presence has increased in the past five years (the highest figure in the region) – and people were the least convinced in the Western Balkan region that the government was doing all it could to fight it. The impact of organised crime seems to be felt stronger in the Bosnian Federation: 66% of respondents in that entity felt affected by organised crime 'in daily life' or 'occasionally', while the corresponding figure in Republika Srpska was at 41%.

Even more Bosnian residents were 'certain' that there would not be a war in the region in the near future: the proportion rose from 27% to 49%, with another 32% thinking that an upcoming armed conflict was 'not probable'. The share of people wanting stronger ties with their neighbouring countries was the highest in the region in Bosnia and Herzegovina: in 2010, 69% of respondents expressed such as wish.

CROATIA: CROATS ARE MORE SATISFIED WITH LIFE, DESPITE SEEING PERVASIVE CORRUPTION AND LOSING FAITH IN THE EU

Economic sentiment in Croatia has not deteriorated: the percentage of respondents seeing the economy improving has risen by four points to 8%. And while in 2009, three-quarters (74%) of respondents believed that the economy was getting worse, this share dropped to about two-thirds (64%) in 2010.

EU support in Croatia has reached an absolute low, even lower than that seen in pre-accession

countries in earlier enlargements.² While the share of those feeling that EU accession would be 'neither good nor bad' for the country has remained unchanged at 38% since 2009, more people now thought that it would be a 'bad thing' (up 4 percentage points to 32% in 2010). Only 25% of respondents in Croatia thought of EU accession as a 'good thing' and only 38% would currently vote 'Yes' in an EU referendum – as opposed to 43% that would vote 'No'. One positive development regarding Croats' views on the EU was that they were now much more confident that they would be welcomed in the EU: an increase from 42% to 55% of respondents who felt that people wanted Croatia in the Union.

religion plays an important role in their lives (68%).

Croatia has some of the highest Western Balkans rates of respondents that saw corruption as being pervasive in government (89%) and business (93%). On the other hand, the self-reported incidents of giving bribes to get things done were among the lowest in the region (10% of respondents said that they had had to give a bribe in the year before the interview). Since 2008, the rate of people satisfied with the governments' actions against organised crime has gone up by five percentage points to 17%. Two-thirds of respondents, however, were still dissatisfied.

The number of people seeing better opportunities outside of the country has continued to increase (up 3 points to 48%). This has not, however, led to an increase in peoples' wish to leave the country which remains the lowest in the region: 13% of interviewees said that they would emigrate under ideal circumstances.

KOSOVO: WITH CONCERNS ABOUT THE ECONOMY AND WIDESPREAD CORRUPTION, KOSOVARS LOOK TOWARDS THE EU

Kosovo seems to have witnessed a most worrying development in the past year. In the past it has had the

most upbeat Western Balkan residents, but in 2010, many more people claimed that they were struggling financially: an increase from 33% to 54%. This development could be partly explained by a sharp drop in the numbers of Kosovo Albanians saying they received money and goods from abroad: a decrease from 23% to 15%. And while the share of people seeing the country's economy as improving was – along with Montenegro – the highest in the region at 30%, more and more people thought the opposite – that Kosovo's economy was getting worse: from 23% in 2009 to 37% in 2010. A striking 59% of unemployed respondents did not believe that they would find a job in the year following the survey interview; this was especially disturbing

HELENA ŠUPER



Osijek, Croatia

While more than two-thirds (70%) of Croats disapproved of their leaders' performance, Croatia was the only country in the region where confidence in the judicial system has grown since 2008: 44% of respondents now stated that they had *a lot* or *some* trust in the judiciary (up from 25%). Croatia currently has one of the highest rates of people saying that

² The question "Generally speaking, do you think that [COUNTRY]'s membership of the European Union would be a good thing, a bad thing, or neither good or bad?" has also been asked in Candidate Country Eurobarometer surveys conducted by Gallup for the European Commission prior to the 2004 European Union enlargement. To consult the results of these surveys please visit http://ec.europa.eu/public_opinion/archives/cceb2_en.htm

given the reported unemployment rate of an estimated 45.4%³ in 2010.

Support for EU accession remained high at 87%, but Kosovo respondents were less convinced that the people in the Union wanted their country to join; the share of people feeling that Kosovo would be welcomed has dropped from 75% to 65% in 2010.

The approval of Kosovo's leadership, among the highest in the region in earlier *Balkan Monitor* waves, has dropped from 59% to 48% between 2009 and 2010. This reduced support for the administration was reflected in a lower confidence in the national government and in the judicial system.

Both Serbs and Albanians in Kosovo now find religion much more important than they did four years ago. The shares of respondents considering it to be an important part of their lives have increased from 59% to 81% (for Serbs) and from 68% to 89% (for Albanians) in the period since 2006.

The perception that government corruption was pervasive has risen by eight percentage points (to 91%). On the other hand, far fewer people stated that they had to give bribes (to get something done) in the year before the interview: the rate of bribes being offered has dropped from 20% to 9%. A similar development could be observed in the area of organised crime where the share of respondents stating that the criminal networks affected them personally has dropped from 67% to 43%.

There was a strong decline in the number of interviewees who saw more opportunities abroad than in their own country (from 64% to 48% since 2009) – a development probably linked to the strong drop



Prizren, Kosovo

in remittances received. As a result, while about one-third (31%) of respondents expressed a wish to leave their country, only 8% of those (so 2%-3% of total Kosovo respondents) had concrete plans to leave. A year ago it had been 16% of those wanting to leave.

Asked when they expected to be included in the visa liberalisation scheme for the Schengen zone, 52% of respondents 'did not know' – and another 38% stated that they did not expect to be included until their country was recognised internationally.

Respondents in Kosovo expressed a wish for better ties with neighbouring countries – 55% stated that they were not strong enough. Albanian respondents in Kosovo were also very supportive of the concept of 'Greater Albania', a country comprising the territories in Kosovo, Macedonia and Albania with majority-Albanian populations. In 2010, 81% of Kosovo Albanians supported such an idea, up from 54% in 2008.

A compromise solution to the conflict with Serbia did not seem to find any support from Kosovo respondents. Vast majorities (90%-93%) of both Kosovo Albanians and Kosovo Serbs disapproved of plans to join the Serbian-populated areas or to exchange the areas with Serbian majority for Albanian-populated territories in the south of Serbia.

³ See the "EU Candidate and Pre-Accession Countries Economic Quarterly" at http://ec.europa.eu/economy_finance/db_indicators/cpaceq/documents/cceq_2010_q3_en.pdf

MACEDONIA: PEOPLE ARE LESS SATISFIED WITH LIFE; VISA-FREE TRAVEL HAS HAD LITTLE EFFECT ON EU SUPPORT

With 72% of respondents stating that they could only manage on their household's income 'with difficulty' or 'with great difficulty', Macedonia has one of the highest shares of people struggling financially. A similarly dramatic situation had been observed in previous waves of the *Balkan Monitor*, and this hardship seems to weigh heavily on the life satisfaction of people in Macedonia. Asked to rate how satisfied they were with their lives in general, on a scale from 0 to 10, people on average gave their lives a score of 4.2 – the lowest in the Western Balkan region, and down 0.3 points from the score measured in 2006.

The introduction of visa liberalisation in late 2009 seems to have had little effect on Macedonians' view of the EU. Since 2006, Macedonia's support for the EU has steadily decreased: 60% of respondents thought of Macedonia's EU accession as a 'good thing', down from 76% in 2006. Nevertheless, a referendum about EU integration would still gather a large majority of 'Yes' votes: 82% of Macedonian residents stated that they would vote pro EU.

Macedonia is one of the few countries covered by the *Balkan Monitor* survey where the share of respondents feeling represented by a politician or a political party has decreased in the past year. While 42% of respondents felt represented in 2009, the share has decreased to 33% just one year later. Among both Macedonian and Albanian respondents in the country, the people's confidence in institutions has been decreasing across the board. While religious organisations were still among the most trusted institutions, the share of people having confidence in them has decreased from 74% to 69% among Macedonians and from 82% to 69% among Macedonian Albanians. The judicial system was one of the least trusted institutions in the country: only 31% of Macedonians and 20% of Macedonian Albanians had faith in the institution.

The share of people reporting that they had to bribe

someone to get something done in the year before the survey has declined from 20% to 13% since 2009, but more than two-thirds (70%-74%) still saw high-level corruption as pervasive in both government and the business world.

More respondents in Macedonia than in any other country in the region believed that better opportunities could be found abroad: 58% thought that way (up 4 points from 2009). However, despite a rise in the number of people that would 'ideally' like to leave their country, only 13% of the 34% that felt this way (about 4% of respondents) had concrete plans to leave permanently in the year after the survey.

As in previous waves of the *Balkan Monitor* survey, more Macedonians than any other group felt that there was still a danger of an armed conflict: 28% of respondents felt that a war would 'certainly' or 'probably' happen. The share of respondents not believing in that possibility, however, has risen: in 2006, 55% did not believe in the possibility of another war, this figure has increased to 64% in 2010.

MONTENEGRO: MONTENEGRINS ARE MORE SUPPORTIVE OF THE EU, HAPPIER ABOUT LIFE AND LESS AFFECTED BY CRIME

Like most of their fellow residents in the Western Balkans, Montenegrins are still suffering from the effects of the financial and economic crisis. About 7 in 10 (71%) respondents said they were having difficulties in managing on their household's income. That figure has hardly changed since 2009, but it was much higher than before the crisis (51% in 2008). In a similar vein, the proportion of respondents expecting the actual economic situation to improve (30%) has remained stable and the same holds true for the number of unemployed interviewees who were optimistic about finding a new job in the next 12 months (50%). In 2010, however, fewer Montenegrin residents could count on friends and relatives who were living abroad (31%, minus 7 percentage points); despite this, Montenegrin households did receive more money from abroad than they did in the previous year (plus 3 points to 12%). This positive development in the actual transfer of

money/goods was unique among Western Balkan countries. As in all countries, except for Albania and Kosovo, respondents in the current wave were more likely to believe that opportunities abroad were better than at home (plus 7 points to 52%). Against the backdrop of economic stagnation, it is interesting to see that the average life satisfaction among Montenegrins has increased: the score has risen to 5.5 (up from 4.8) on a scale from 0 to 10 – this was the highest score in Montenegro since the launch of the *Balkan Monitor* in 2006, almost equalling Croatia's score of 5.6.

Visa liberalisation for travel to the Schengen area for Montenegrins seems to have had a substantial effect on support for the EU, which reached a new peak with 73% of respondents saying that their country's EU membership would be a *good thing* (plus 6 percentage points). At the same time, respondents in Montenegro were now more likely to feel that their membership would be welcomed by EU citizens (plus 5 percentage points to 59%). This was in line with the fact that Montenegrins, on average, now thought that EU accession would happen in 2016 and not in 2017, as estimated during the previous wave.

Despite these encouraging developments in EU-related areas, people in Montenegro have become more sceptical of their country's leadership: 41% now disapproved of their leaders' performance (plus 12 percentage points), while the number of those giving their approval has remained at 48%. Even so, the national government was by far the most trusted in the region (70% expressed *a lot or some* trust in it). A worrying trend, though, was observed regarding freedom of expression: 64% of survey participants said that most or many people were afraid to openly express their political views (compared to 50% in 2006). This was the highest figure in the Western Balkans.

Levels of perceived government corruption were stable in Montenegro (at 50%), while fewer people thought that corruption was widespread in the business world (minus 5 points to 64%). There were also fewer respondents saying that they had had



MARKO MILOŠEVIĆ

Herceg Novi, Montenegro

to offer bribes to get something done in the last 12 months (minus 6 points to 13%).

Furthermore, Montenegrins were now the least likely Balkan residents to say their daily lives were affected by organised crime (minus 3 points to 7%). This also translated into a higher number of respondents being satisfied with their government's efforts to combat organised crime (plus 6 points to 41%).

Public opinion in Montenegro was relatively supportive of a potential membership of NATO: 38% of respondents supported their country's accession to the Alliance and 24% thought that it would be a *bad thing*.

SERBIA: DESPITE THE ECONOMIC OUTLOOK, SERBS DO NOT WANT TO EMIGRATE AND JOBLESS FEEL MORE OPTIMISTIC

The mid-term effects of the financial and economic crisis are still raging in Serbia: an unsettling 78% of respondents in the country said that they had difficulties in making ends meet. This rate was the highest in the region and has remained unchanged since 2009. In the case of Serbia, this economic hardship does not seem linked to the reduced inflow of remittances: in all waves of the Balkan

Monitor, a relatively low percentage of people in the country (currently 6%) have said they received money or goods from abroad in the past 12 months. In a similar light, people in Serbia were also the most pessimistic regarding the economic development of their country: 70% of respondents (plus 4 percentage points since 2009) saw economic conditions as getting worse. One specific finding in the *Balkan Monitor* can be, however, interpreted as light at the end of the tunnel: a rising share of unemployed respondents (45%, up from 39% in 2008 and the highest such rate in the Western Balkan region) was hopeful that they would find a job within a year after the survey interview.

EU support in Serbia has been steadily decreasing since the beginning of *Balkan Monitor* measurements in 2006. For the first time in this period, less than half of respondents (44%) thought of EU accession as a 'good thing'. It seems, however, that in the case of a referendum (on the Sunday after the survey interview) a majority would still support Serbia's EU membership plans with 63% stating that they would vote 'Yes'. Serbia's difficult path to EU integration seems to have reflected on how people perceived the EU citizens' stance on the matter of Serbia's accession: the share of people thinking that 'people in the EU want Serbia to join the EU' has dropped from 53% to 41% between 2009 and 2010.

Only 22% of respondents in Serbia said they approved of their leaders (-5 points since 2009) and that meant that two-thirds of Serbian residents disapprove of their leadership. A similar share (68%) did not feel represented by any party or politician. While, in 2010, more people did say that they felt represented politically (plus 7 percentage points since 2009), that figure was only a quarter (27%) of the population.

Within the Western Balkans, Serbia was one of the countries where people were the least willing to say that religion played an important role in their everyday lives – just over half of respondents stated that this was the case. Serbs' view of corruption in government and business has remained very critical

with more than 8 in 10 respondents claiming that corruption was widespread in both domains. At the same time, there was a significant drop of six percentage points in the self-reported need to give a bribe in the year prior to the interview; in 2010, 12% stated that they felt forced to pay a bribe in the 12 months before the survey.

Despite the dramatic financial situation of most respondents and people's gloomy outlook about their country's future, a rising share of respondents expressed the wish to remain in Serbia. While in 2006, a quarter of interviewees 'ideally' would have liked to leave the country and almost two-thirds (63%) said they wanted to stay, four years later, three-quarters (77%) wished to remain in Serbia while just 19% saw a better life elsewhere. Together with people in Macedonia, Serbian respondents were the group most likely to see a risk of a war breaking out in the region within the next five years – a quarter (24%) thought that such an event was 'probably' or 'certainly' going to happen. At the same time, respondents in Serbia remained keen about better neighbourly cooperation; just as in 2009, about two-thirds (64%) stated that the ties to neighbouring countries should be stronger. Regarding a very topical neighbourhood conflict, the unilateral declaration of Kosovo, Serbs were not becoming more conciliatory and were less likely to accept compromise solutions. While in 2008, half of respondents thought that the partition of Kosovo could be part of a possible future solution, in 2010, only 43% agreed with such an idea while two-thirds (67%) thought that Serbia would 'never' recognise Kosovo as an independent country.

A similar intransigence could be observed concerning Serbia's possible future accession to NATO: only 13% in Serbia thought it would be 'a good thing', while 52% felt that it would be 'bad'. Lastly, in an issue of great importance to Serbia's ambitions concerning EU integration, 37% of respondents in the country thought that 'war criminal at large' Ratko Mladic could not be found by the authorities because he was hiding abroad. A similar share of 35%, though, were convinced that 'the authorities know where he is, but do not want to capture him'.

Material situation and life satisfaction



IVICA MATEJIC

Numerous economists have commented that Western Balkan countries follow general European and global trends in their economic development – albeit with a certain time lag.⁴ The financial and economic crisis that struck Western Europe in 2008, for example, seems to have had its worst impact on Balkan economies in 2009. This year's survey results, therefore, should be able to give a good indication on whether the recovery experienced by large European economies is already being felt by Western Balkan residents – or whether the crisis is still a reality for people in the region.

Financial difficulties persist – with a dramatic increase in Kosovo

At the time of the 2010 survey, majorities across all Western Balkan countries stated that they found it difficult to manage on their households' income. This proportion was the smallest in Croatia, with 52% stating that they got by *with difficulty* or *with great difficulty*, while the greatest proportion of people struggling was seen in Serbia, where 78% of interviewees reported difficulties in making ends meet. In all Western Balkan countries, except for Croatia and Macedonia, a rise in the numbers reporting financial difficulties was observed between 2009 and 2010. The rise was most dramatic in Kosovo, where the share of people struggling increased from 33% to 54% within just one year.

A steady decline in people being able to count on help from abroad

Many studies undertaken since the beginning of the economic crisis have shown that one of the

strongest effects of the crisis on Balkan economies has been the shortfall of remittances. Due to economic hardship and a difficult labour situation in the traditional target countries of Western Balkan migrant workers such as Germany, Italy and Greece, family members working in exile have had to either return to the Balkan region or reduce the amount of money sent back home.

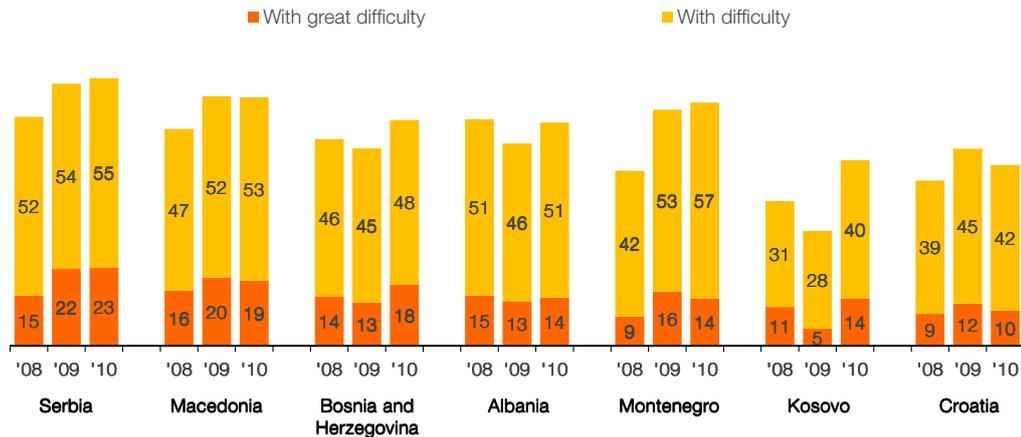
The results of the current *Balkan Monitor* clearly confirm such an analysis. Since the question regarding the help of relatives or friends living abroad was asked for the first time (2006), the share of people stating that in times of hardship they could rely on a close relative or friend abroad has been steadily declining in most countries. The drop was especially steep in Kosovo and Montenegro where the proportion of respondents being able to count on help from exiles went from 56% to 36% and from 51% to 31%, respectively. Albania (45%) and Macedonia (41%) had the most respondents stating that they could rely on help from abroad; Serbia (27%) and Croatia (26%) had the lowest numbers.

The decline in the number of Western Balkan migrants being able to help their family or friends at home is reflected in the fact that declining shares

4 For a recent study see "How are the Balkans Weathering the Storm of the Economic Crisis" by Marin Lessenski at <http://www.iris-bg.org/files/The%20Western%20Balkans.pdf>

MAJORITIES STRUGGLING TO MAKE ENDS MEET IN MOST WESTERN BALKAN COUNTRIES

Can you manage on your household's income?



of respondents in most countries receive money or goods from contacts abroad. In 2010, such a development was visible across all nationalities in the Western Balkans, but mostly affected Albanians living in Albania, Kosovo and Macedonia – traditionally the ethnic group with the highest percentage of migrants in the Western Balkans. While in 2009, a share of 23% of Kosovo Albanians 18% of respondents in Albania and 19% of Macedonian Albanians said they received help from abroad, in 2010 the percentage had decreased to 16% of Albanians (in Albania) and 15% of Albanians in Macedonia and Kosovo. This dramatic decrease – of eight percentage points – was certainly one of the reasons for the worsening material situation in Kosovo described in the beginning of this chapter.

Balkans' economies – still feeling the effects of the crisis

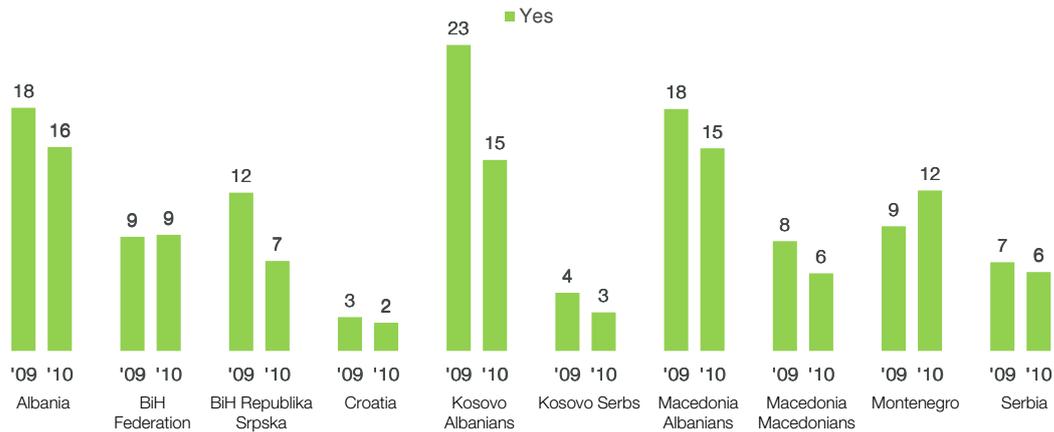
Regarding the question as to whether the Balkan economies were recovering after the crisis, the views of the people in the Balkans were clear: they did not believe that their respective economies were getting healthier. Between 2009 and 2010, in all countries except Croatia, there was an increase in the percentage of people feeling that the economic situation in their countries was *getting worse*;

furthermore, in all countries, those feeling that the situation was getting worse outnumbered those respondents stating that it was getting better. The situation was seen as being especially gloomy in Bosnia and Herzegovina, Serbia and Croatia where around two-thirds of respondents felt that the state of their economies was worsening. The development of economic sentiment is specifically negative in Serbia, where the share of people feeling that the economy was getting worse rose from 24% to 70% in the period between 2006 and 2010. The highest share of optimistic respondents – feeling that the economic situation was improving – was seen in Montenegro and Kosovo (both 30%).

Amidst this gloomy sentiment regarding the overall economic situation, the 2010 *Balkan Monitor* data did not provide many indicators that would support the theory that the Western European recovery would soon be followed by an upward trend in the Balkans. Among the few positive signs was the job-related optimism of unemployed respondents in Macedonia and Serbia. Asked whether they were hoping to find a job within the 12 months after the survey, higher numbers of jobless respondents in both countries felt that it was *very likely* or that *there was a good chance* that they would find employment. In Macedonia, this number rose from 16% to

LESS MONEY OR GOODS RECEIVED FROM ABROAD ACROSS ALMOST ALL BALKAN ETHNIC GROUPS OR ENTITIES, ONLY MONTENEGRO SEES A RISE

In the past 12 months, did this household receive help in the form of money or goods from another individual living abroad?



24% between 2008 and 2010 while in Serbia the share of optimistic job-seekers went up from 25% to 45% in the same timeframe.

While the positive feeling in Serbia reflects the prevailing economic sentiment in that country, it would not be sufficient to turn-around the poor employment situation in the Western Balkan region. While the unemployment rate in Serbia was relatively high at 17.4% in 2009, it was strongly exceeded by Bosnia and Herzegovina (42.7% in 2009) and Kosovo (47.5% in 2008). Job-related optimism would therefore be essential in those two countries; however, the *Balkan Monitor* figures suggested that the jobless in both states were far from feeling upbeat about their job prospects. In Kosovo, the share of unemployed respondents finding it *not likely* or *not likely at all* that they would find a job within a year grew by eight percentage points to 59% (from 2009 to 2010), while in Bosnia and Herzegovina the same figure skyrocketed from 42% to 74% in just one year. It seems that politicians' campaign promises prior to the October 2009 general elections in Bosnia and Herzegovina have not installed more confidence in the country's jobless.

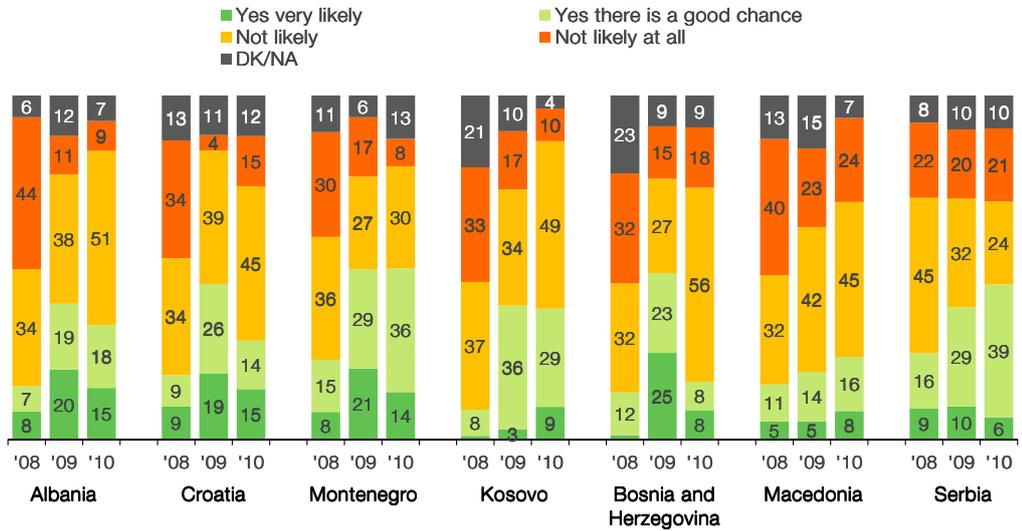
Money is not everything

Among economists and political analysts there is more and more talk to look 'beyond GDP' when looking at an economy's welfare by putting citizens' wellbeing at the centre of analysis. The *Balkan Monitor* asked questions about wellbeing since the beginning of measurements in the Western Balkan region and is now able to provide insight into the trends around Western Balkan residents' life satisfaction. In 2010, one of the wellbeing-related questions aimed to assess people's life satisfaction by asking them to place their feelings about their own life on a scale from 0 to 10.

Judging by the averages of self-assessments given by respondents in the respective countries, people in Croatia were most satisfied with their lives – they gave themselves a score of 5.6 on average. The least satisfied were respondents in Macedonia with an average of 4.2 – a decrease of 0.3 points from the first results gathered in that country in 2006. Looking at the region, the levels of life satisfaction have not followed the negative economic trends, but seem to have remained rather stable since 2006.

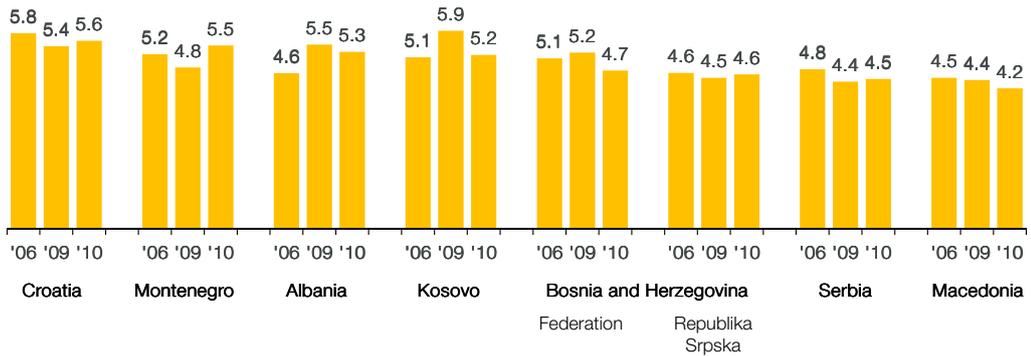
JOBLESS ARE PESSIMISTIC, EXCEPT IN MACEDONIA AND SERBIA

Do you think you will get a job in the next 12 months? (Base: unemployed respondents)



IN MOST COUNTRIES, NO INCREASE IN LIFE SATISFACTION OVER THE PAST FOUR YEARS

If the top step is "10" and the bottom step is "0", on which step of the ladder would you say you personally feel you stand at this time, assuming that the higher the step the better you feel about your life, and the lower the step the worse you feel about it? Which step comes closest to the way you feel? (Averages of responses given)



Attitudes toward the EU



ANDRZEJ PYRKA

After a long period in which the Western Balkan states were vainly waiting for signals from Brussels that they would be moving closer to EU accession, 2009 and 2010 finally brought concrete steps. In December 2009, the EU lifted the visa requirements for three Western Balkan states: Montenegro, Macedonia and Serbia. This gave a clear message that the Western Balkans had not been forgotten by the European Union – a timely signal in a phase where EU support was slowly fading in many countries of the Western Balkans, as the *Balkan Monitor* has observed in past years.

EU accession still supported – but not so fervently

Despite this positive development towards EU integration, trends in Balkan populations' stance on EU accession have not followed one particular pattern in 2010. For example, while EU support continued to increase in Montenegro (from 67% in 2009 to 73% in 2010), it sustained its downward trend in the other two countries that now enjoy visa-free travel: the share of people thinking EU accession would be a good thing fell from 62% to 60% in Macedonia and from 50% to 44% in Serbia since 2010.

The EU enjoyed a strong rise in support from people in Bosnia and Herzegovina in the past years. While in 2008 48% of respondents thought that acceding to the EU would be a good thing for the country, the figure had risen to 69% in 2010. When examined at entity level, this rise mostly stems from a strong improvement of the EU's image in Republika Srpska: from a mere 31% that supported EU accession in 2008, the figure increased to 59% in 2010. Over the same period, EU support in the Bosnian Federation increased from 57% to 73%.

A similar picture emerged in Croatia: support for the EU decreased further this year with roughly a

third (32%) of respondents thinking that EU accession would be a bad thing compared to 28% in 2009. Furthermore, the *Balkan Monitor* – for the third time in a row – reported that a relative majority of Croatians remain indifferent to EU integration with 38% seeing it as neither a good nor a bad thing.

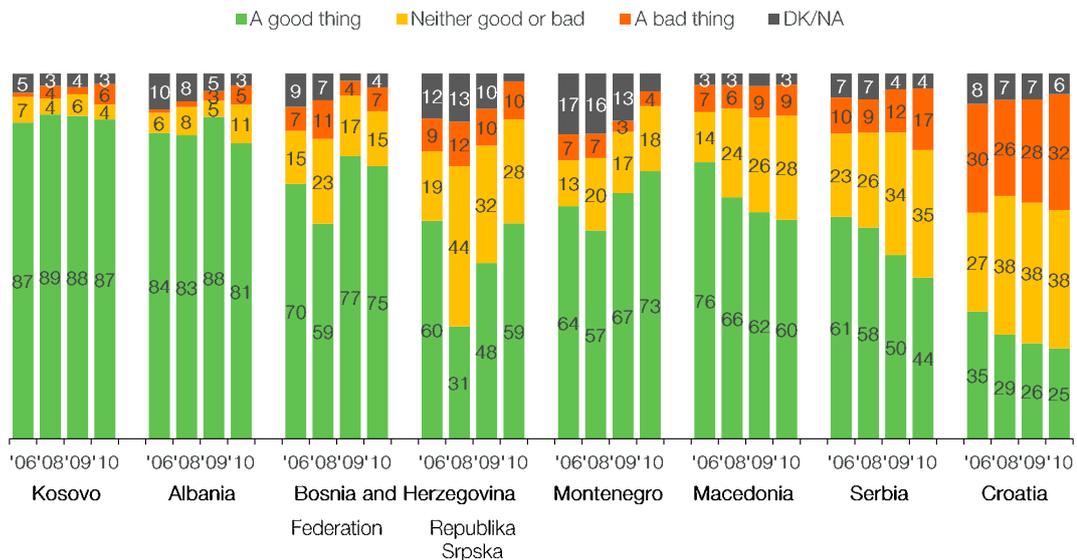
In Albania, a state that showed high levels of support for the EU since 2006, results were noticeably different from the past year; the share of respondents thinking that EU accession would be a good thing dropped from 88% to 81% in 2010. In Kosovo, another country with traditionally high support for the EU, the level of support remained roughly unchanged.

The responses to the question on voting intentions in the event of an EU accession referendum were consistent between 2009 and 2010: majorities in all Balkan states, except Croatia, said that they would vote 'Yes' (ranging from 63% in Serbia to 93% in Albania). In Croatia – in line with the low level of EU support – the proportion of those who would vote 'No' remained higher than those who would vote 'Yes' (43% vs. 38%).

Public perceptions regarding what people in the EU thought about their country's prospective

NO CONSISTENT PATTERN IN THE LEVEL OF EU SUPPORT
– BUT BIG DECREASES IN ALBANIA AND SERBIA

Generally speaking, do you think that [COUNTRY]'s membership of the European Union would be a good thing, a bad thing, or neither good or bad?



membership showed relatively more variation compared to previous years. In 2010, respondents in Kosovo and Albania had the most confidence that EU citizens were supportive of their accession to the Union: 69% (in Albania) and 65% (in Kosovo) thought that way. Conversely, Serbs have become less confident than people in the rest of the Balkan states with about 4 in 10 (41%) respondents feeling that people in the EU were sympathetic to Serbia's EU integration (a decrease of 12 percentage points since 2008).

Despite their negative stance towards EU accession, in 2010, an increasing number of Croats felt that people in the EU approved of their prospective membership – the proportion of respondents who said that EU citizens wanted Croatia to join the EU has increased by 13 percentage points since 2009. This development might be a direct consequence of the end to Slovenia's 'blockade' of Croatia's EU integration efforts in September 2009, following intense negotiations around the Slovenian-Croatian border dispute.

Little change in views concerning the dates for EU accession – except in Bosnia and Herzegovina

These recent developments – related to Slovenia-Croatia relations – that removed one of the major obstacles on Croatia's path towards EU integration have not, however, made Croats expect their countries' EU accession date arrive sooner. While in 2009, respondents in Croatia on average believed that 2013 would be the year in which they would enter the Union, in 2010 the common belief was that accession would only take place in 2014. The same year was, on average, expected by Albanians as their country's date of EU integration; this assessment was a bit surprising since Albania is at an early stage of the EU accession process and has not achieved the status of being an official candidate country yet.

In most Balkan countries, the expectations around the speed of EU accession have remained relatively unchanged: in Montenegro, people on average

believed that their country would join in 2016 while in Kosovo, Macedonia and Serbia the mean expected accession date was 2017. The only country where expectations shifted significantly over the past year was Bosnia and Herzegovina, where the average date of potential entry into the EU moved closer: from 2022 to 2018. It is likely that people's increasing optimism concerning the EU integration process is linked to the visa liberalisation issue. After Bosnia and Herzegovina had been denied visa liberalisation in the first round in 2009, the country made great progress on the road map towards visa-free travel to the Schengen zone. As the *Balkan Monitor* results show, this did not go unnoticed with residents of the country, who now believed that EU accession was coming closer.

The *Balkan Monitor* also asked respondents which EU member state they perceived as being the biggest supporter of their country's EU accession. While, in Kosovo and Croatia, majorities felt most supported by Germany (31% and 27%, respectively), Slovenia was considered to offer the most support by the people of Macedonia and Montenegro (24% and 11%, respectively). In addition, roughly 3

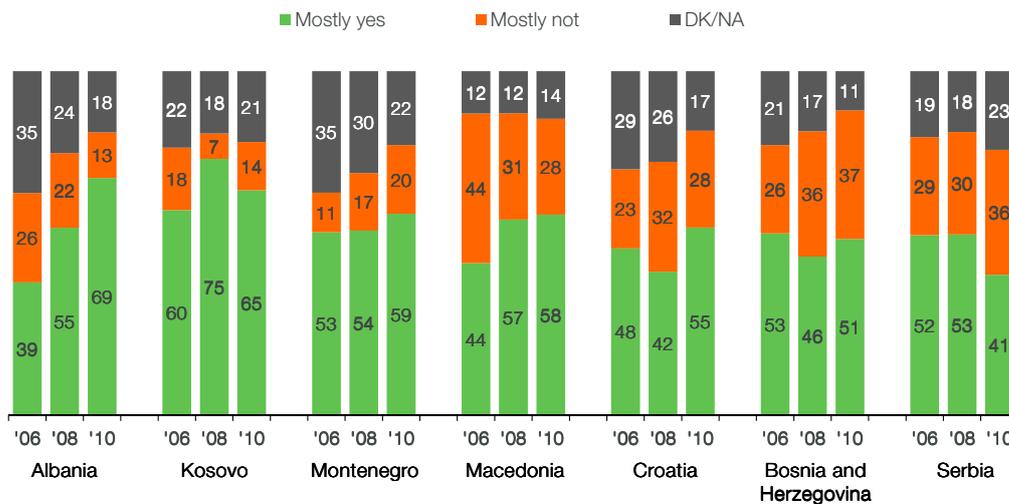
in 10 of respondents in Albania believed that Italy was the biggest supporter of their country's accession to EU.

Serbs, on the other hand, saw Greece as the biggest supporter of their accession to the EU (38% shared this idea). This perspective is probably rooted in the long history of friendly relations between the two states and Greece's continuing refusal to recognise Kosovo as an independent state. Another country where a significant number of Serbs (10%) believed there was considerable support for their EU membership was Spain – which has not recognised Kosovo either.

Unlike most of the other Balkan states, respondents from Bosnia and Herzegovina did not have one favourite: similar amounts of interviewees (10%-12%) mentioned Austria, Germany and Slovenia as the biggest supporters of their EU membership. There was a slight difference in perceptions at entity-level: while the biggest share of people in Republika Srpska (9%) saw Greece as their biggest supporter in EU accession, respondents in the Federation most often mentioned Austria (18%). In both entities,

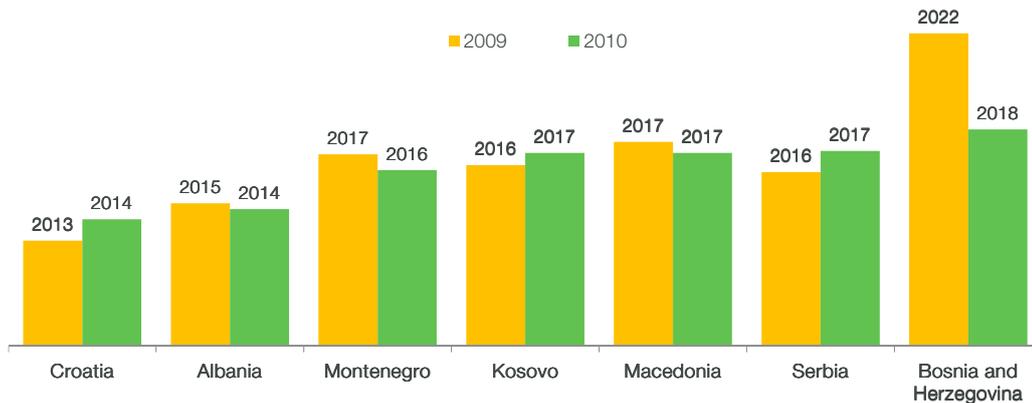
SERBIA AND KOSOVO FEELING THAT FEWER EU CITIZENS WANT THEM IN THE UNION

Do you think that the people in the European Union want [COUNTRY] to join the European Union?



BOSNIANS BECOMING MORE OPTIMISTIC ABOUT EU ACCESSION, ALBANIANS PERHAPS TOO OPTIMISTIC

When, in which year do you think [COUNTRY] will be a part of the European Union?



however, Germany and Slovenia were among the most frequently named supporters of Bosnian EU integration.

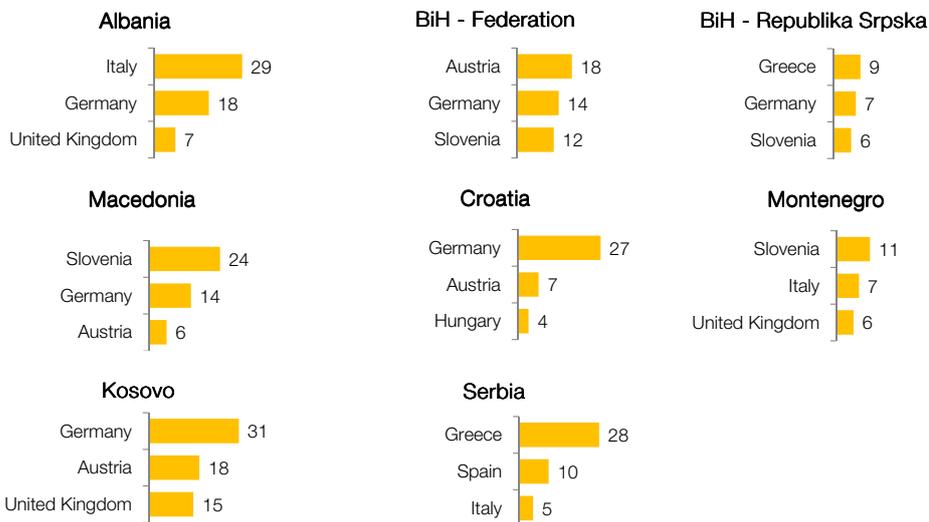
People's responses to the question about which EU member state was the major opponent to their country's membership of the Union were also suggestive of the current state of relations between the respective states. For example, 4 in 10 Croatians perceived Slovenia, with whom they have gone through a border dispute that has not yet been fully resolved, as the major opponent of their EU membership. Similarly, Serbs were the most critical of the Netherlands – possibly because of that country's objection to Serbia's EU accession unless

it fully cooperated with the International Criminal Tribunal for the former Yugoslavia (ICTY). On the other hand, respondents in Kosovo named Spain (33%), Greece and Cyprus (both 11%), all of which have denied recognition to Kosovo, as their biggest opponents to their integration into the EU.

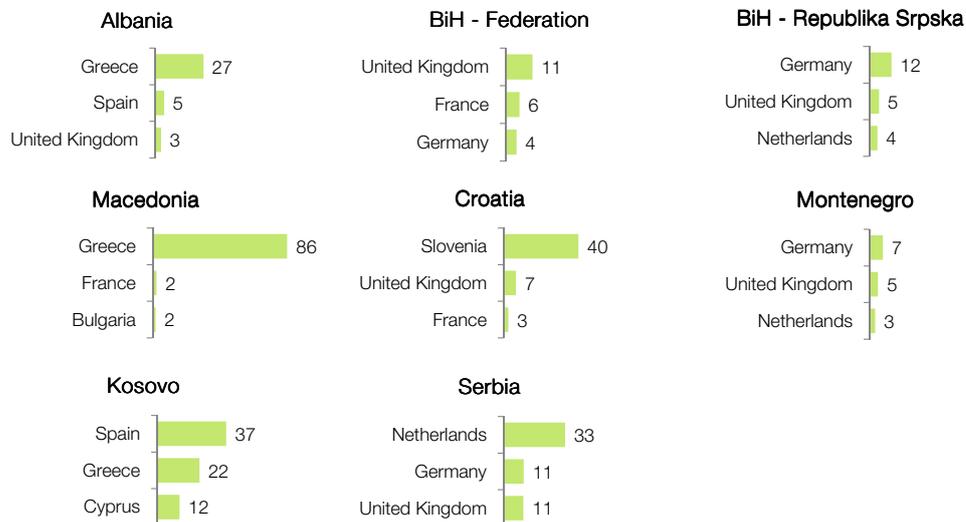
Finally, the *Balkan Monitor* results showed that a strong majority of Macedonians (86%) felt that Greece was against their membership – this could easily be linked to the unresolved name dispute between the two countries, where Greece has threatened to halt Macedonia's EU membership negotiations.

PERCEPTIONS ABOUT THE GREATEST SUPPORTERS AND OPPONENTS OF BALKAN COUNTRIES' EU ACCESSION

In your opinion, which EU member state is the biggest supporter of [COUNTRY]'s EU accession?



And which EU member state is most opposed to [COUNTRY]'s EU accession?



Satisfaction and confidence in the region's institutions



ANDRZEJ PYRKA

Despite the existing shortfalls and material problems, it can be seen as real progress that the Western Balkan region is slowly becoming, since the armed conflict in Macedonia in 2001, “another boring part of Europe”, as recently stated by analyst Heather Grabbe.⁵ Whether this is a success of the EU’s stabilising policies or not, it is a major step forward for the people of the region, who can live without imminent fear of conflict. Nevertheless, the challenges remain great: the Balkan countries are still considered as ‘weak states’ and – as observed by the *Balkan Monitor* in past years – many of the region’s national institutions have a long way to go in order to earn the trust of their countries’ residents.

Trust in politicians and the ability to express political views openly

Regarding the trends in people’s satisfaction with their state government, a very mixed picture emerged for the Western Balkan region: while in Albania, Kosovo and Montenegro relative majorities of 48% approved of their respective leaders, in all other countries those disapproving of their government’s performance outnumbered those who approved. While, in Macedonia, approval was still quite high (41%) and only a slight majority (51%) disapproved, leadership assessment was much harsher in Serbia, Croatia and Bosnia and Herzegovina: only around one-fifth of respondents supported their leaders while more than two-thirds disapproved.

Albania was the only country of the region where leadership approval has followed a positive trend since the first *Balkan Monitor* survey in 2006; government approval in that country rose by 17

percentage points over the four years. In the remaining countries, approval ratings either remained relatively stable (Kosovo, Montenegro, Macedonia and Bosnia and Herzegovina) or decreased (Serbia and Croatia). The approval of national leadership has declined strongly in Croatia, where it has dropped by 27 percentage points since 2006.

There were, however, positive signals that the relationship of Balkan citizens towards their political class is becoming more conciliatory. From the *Balkan Monitor* perspective, in most countries, the electorate now feel more represented by politicians or a political party. While during the *Monitor’s* first survey in 2006, the shares of respondents that felt well represented by a politician or political party only ranged from 20% (Croatia) to 36% (Montenegro) and relative majorities everywhere did not feel they were represented, a more democratic picture has emerged in 2010. In all countries, except Serbia, more people now feel politically represented than they did in 2006. This feeling was especially pronounced in Albania (60% felt politically represented), Kosovo (54%) and Montenegro (46%), where

⁵ Consult <http://ecfr.eu/page/-/audio/Balkanreportpod.mp3>, an audio podcast by the European Council on Foreign Relations.

such a positive feeling among respondents outweighed those who felt their political views were being ignored. In all other countries, however, around two-thirds still did not feel politically represented.

Regarding the issue of free political expression, the development observed by Gallup surveys in the region paints a sobering picture. Large shares of respondents throughout the region (between 32% in Kosovo and 64% in Montenegro) felt that *many* or *most* of their compatriots were afraid to openly express their political views. In some countries, the feeling of limited freedom of expression on political issues has even grown recently, as observed in Montenegro (from 50% to 64% since 2006), Croatia (41% to 47%), Albania (14% to 38%) and Kosovo (17% to 32%). Serbia and Bosnia and Herzegovina were the only countries where it was now easier to express political views: the share of people stating that in their view *no one* was afraid to voice a political opinion rose, in those two countries, from 8% to 16% and from 11% to 16%, respectively, between 2006 and 2010.

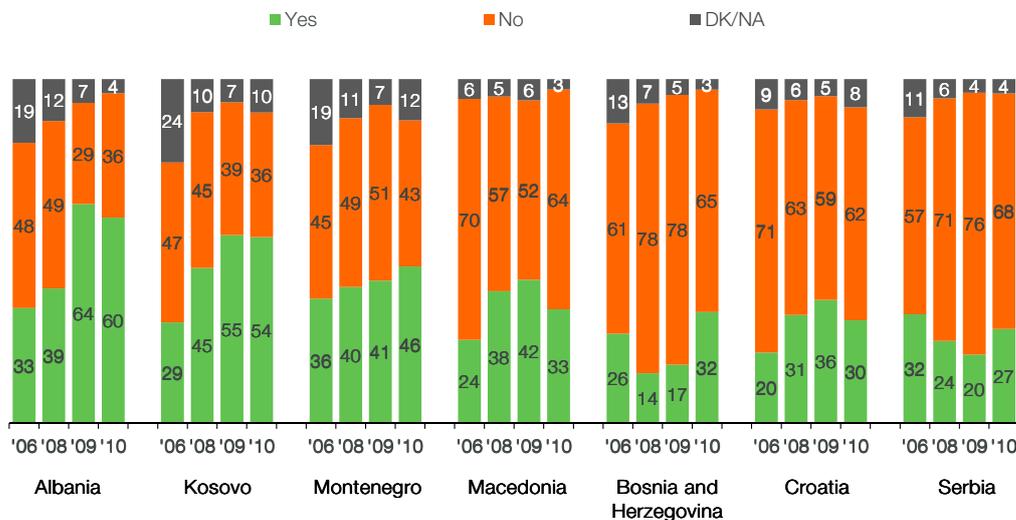
Trust in internal and external institutions still a mixed picture

On the Western Balkans' path towards becoming functioning market democracies, it is crucial that national institutions instil confidence in the citizens of the region. Past waves of the *Balkan Monitor* showed that while, in most countries, the church and the military were trusted a lot by most respondents, state institutions still had a long way to go in order to earn the trust of citizens. It can be said for most institutions – in most countries – that confidence levels have been rather stable over the past three years; neither national nor external institutions such as international organisations have not succeeded in building up trust among the people of the region.

The survey showed that the most trusted institutions in Albania were external: almost 8 in 10 respondents stated that they had a lot or some confidence in NATO. The media was also among the more trusted institutions with 68% of Albanian interviewees showing trust. In general, confidence levels

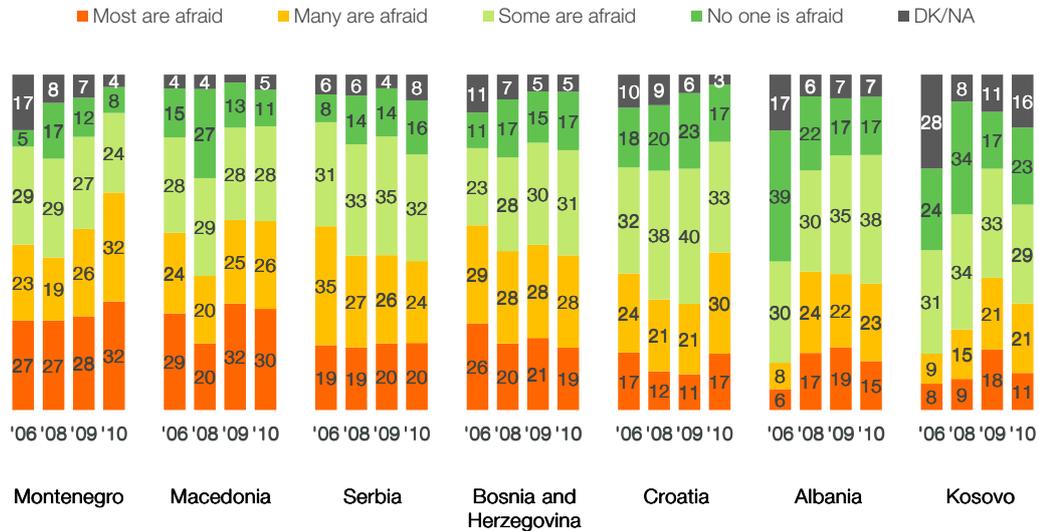
SOME PROGRESS BUT MANY PEOPLE STILL FEEL THEY ARE NOT REPRESENTED POLITICALLY

As of today, is there a political party or a politician in [COUNTRY/ENTITY] that represents your political views?



SERBIA AND BOSNIA AND HERZEGOVINA REPORTING INCREASING FREEDOM OF POLITICAL EXPRESSION

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



have remained stable since 2008. The judicial system was the only body where the people's level of confidence had dropped: by 13 percentage points between 2009 and 2010.

In Bosnia and Herzegovina, the three major ethnic groups showed clear differences in their confidence profiles. Despite a strong drop in the share of people that trusted the religious institutions, they remained the most trusted bodies for Bosnian Serbs and Bosnian Croats (confidence dropped, respectively, from 89% in 2008 to 67% in 2010, and from 85% to 65%). Among Bosniaks, the military instilled most confidence with 70% expressing *some* or *a lot of confidence* in that body; religious institutions were trusted by 53% of respondents. Confidence in the national government rose from 27% in 2008 to 36% in 2010 among Bosnian Serbs, which made this group the one in Bosnia and Herzegovina with most trust in the state government. For Bosniaks (30% had confidence in the national government) and Bosnian Croats (19%) the federal government remained among the least trusted institutions. More residents in the Bosnian Federation had confidence in EU institutions (49% among Bosniaks and 43%

among Bosnian Croats) than people in Republika Srpska (31%). It was notable that among Bosnian Croats, a general drop in institutional confidence could be observed over the past three years, while confidence levels among Bosniaks have remained roughly the same.

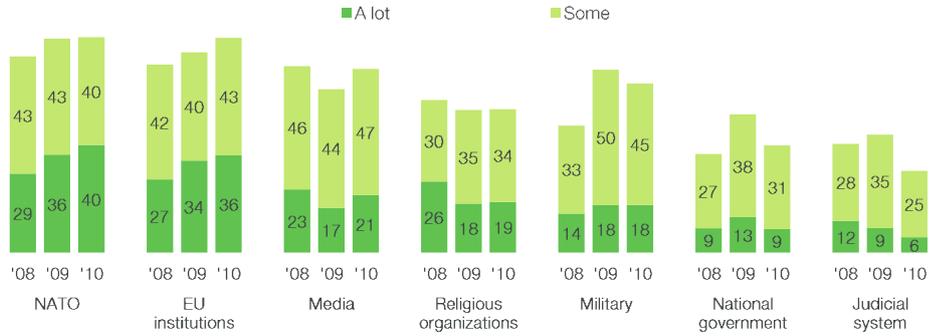
Similar to most countries of the region, Croats expressed most trust towards the military and religious organisations – 83% trusted the military and 64% had trust in the church. Croatian respondents were the only Western Balkan residents to show a growing level of trust in the judiciary: while in 2008, 25% of Croats expressed confidence in the courts, the figure has risen to 44% in 2010. Croats' level of confidence in the national government remains at a relatively low 26%.

In comparison to other groups of the region, Kosovo Albanians showed unusually high levels of confidence in institutions: 91% trusted the military, 84% trusted their religious organisations and 79% had confidence in the EU institutions. Confidence levels remained rather stable, with two notable exceptions; since 2009, confidence in the national

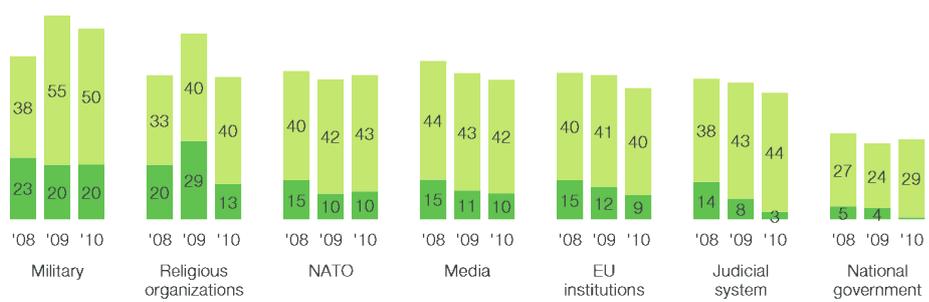
DEVELOPMENT OF CONFIDENCE IN INSTITUTIONS

In [COUNTRY], do you have confidence in each of the following, or not?

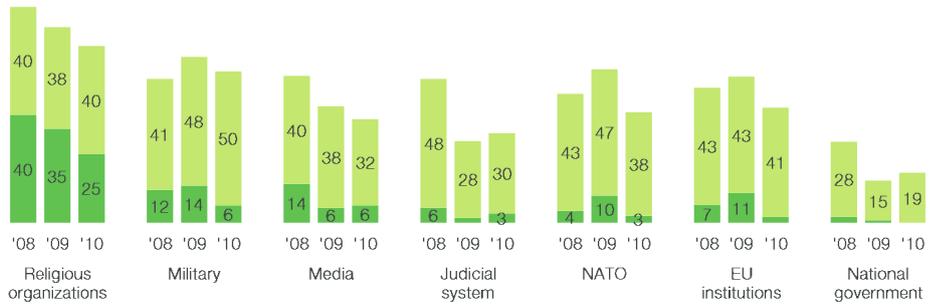
ALBANIA



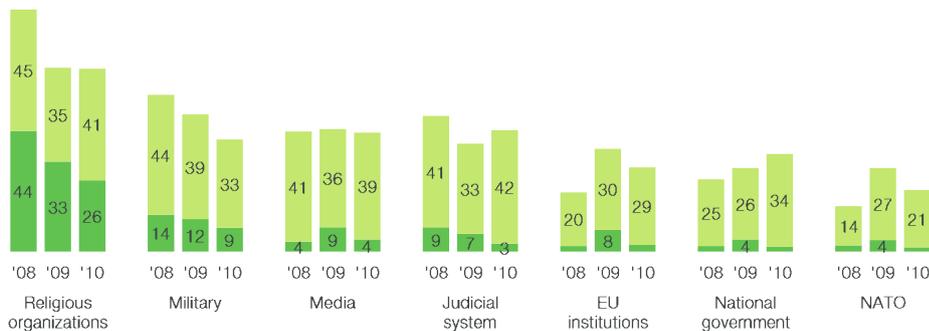
BIH BOSNIAKS



BIH CROATS



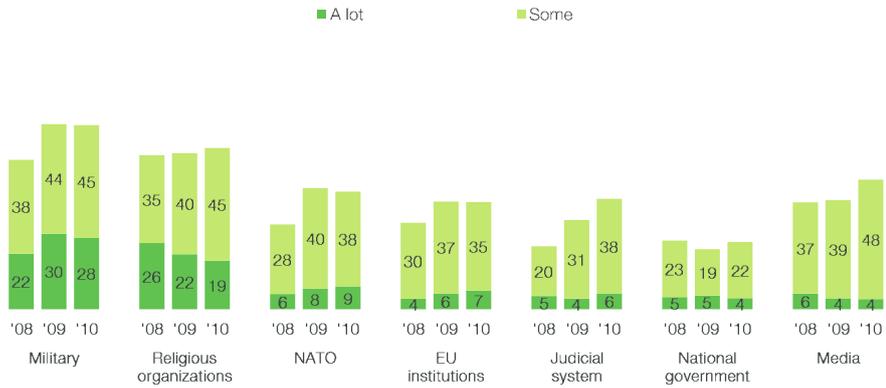
BIH SERBS



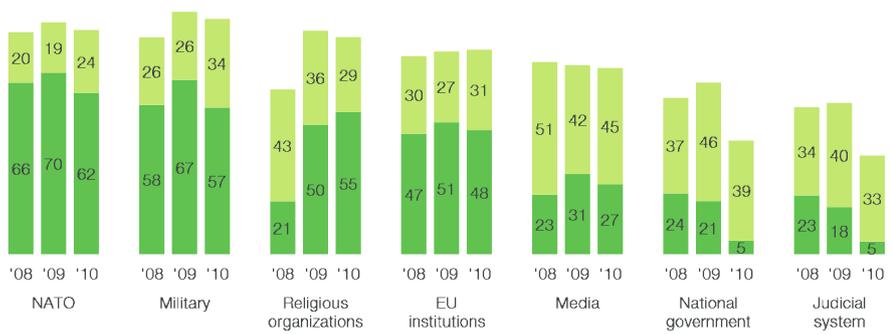
DEVELOPMENT OF CONFIDENCE IN INSTITUTIONS (CONTINUED)

In [COUNTRY], do you have confidence in each of the following, or not?

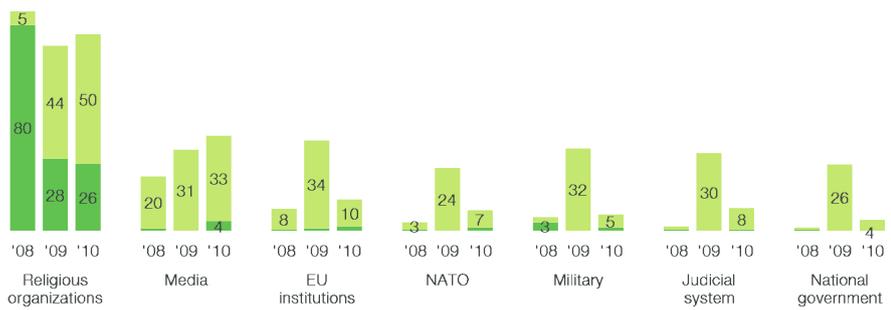
CROATIA



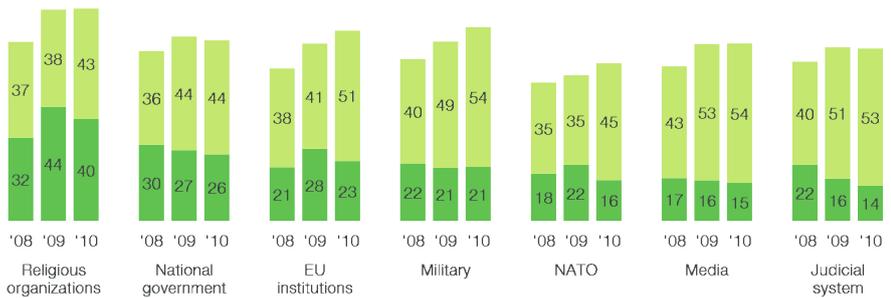
KOSOVO
ALBANIANS



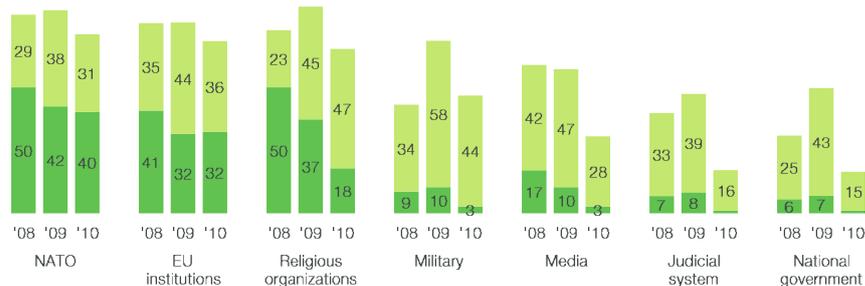
KOSOVO
SERBS



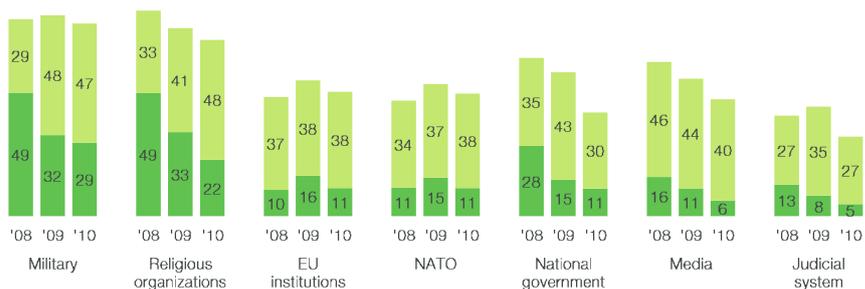
MONTE-
NEGRO



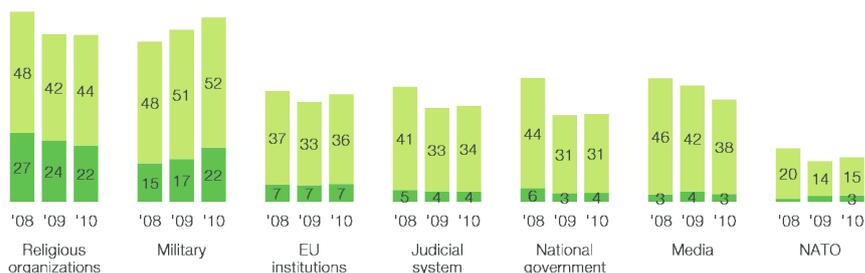
MACEDONIA
 ALBANIANS



MACEDONIA
 MACEDONIANS



SERBIA



government and the judicial system has dropped significantly (from 67% to 44% and from 58% to 38% respectively).

Trust levels among the Serbian part of the Kosovo population were in stark contrast to the Albanian part: the only bodies that had the confidence of a

majority of respondents were the religious organisations with 76% of Kosovo Serbs exhibiting such trust. All other Kosovar institutions such as the military, the government and the judicial system only instilled confidence in a small minority of less than 1 in 10 of the Kosovo Serb population.

Macedonians and members of the largest minority in Macedonia, the Albanians, have slightly distinct profiles when it comes to confidence in institutions. Most Macedonian Slavs had confidence in the military and in religious organisations. On the other hand, NATO was the most trusted institution for Macedonian Albanians, just as it was for the other Albanian groups in Kosovo and Albania, with the EU reaching high levels of confidence among ethnic Albanians as well. Overall confidence levels have decreased for both ethnic groups in Macedonia: among Macedonian Slavs, the level of trust in the

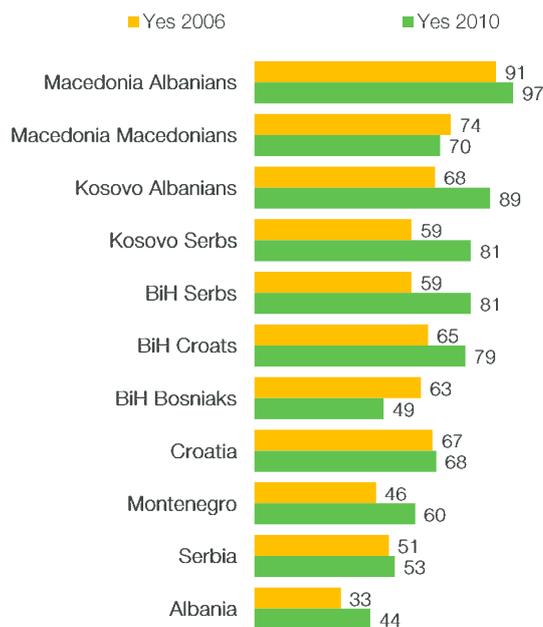
in the government fell from 50% to 16% in just one year (between 2009 and 2010) and trust in the judiciary dropped from 47% to 17% in the same period.

In 2010, along with Kosovo Albanians, respondents in Montenegro reported the highest levels of confidence in institutions, with levels remaining stable since 2008. The national government of Montenegro was by far the most trusted in the Western Balkans, 26% of respondents stated that they trusted it *a lot* and 44% expressed *some* confidence. Overall confidence levels have increased, although in the past three years, increasingly fewer people have stated that they had *a lot* of trust in any of the institutions mentioned and more people said that they only had *some* trust.

In Serbia, religious organisations and the military have remained the most trusted organisations, and those levels of confidence have remained stable since 2008. It is interesting to note, however, that in the past three years, the military has replaced the church as the country's most trusted institution: trust has dropped in the latter from 75% to 66% in the past two years, while trust in the former has risen from 63% to 77% in that period. Trust in the media, the judicial system and the national government is now at a significantly lower level (between 35% and 41% of respondents in Serbia showed confidence in these institutions) and has been decreasing lately. Trust in the EU institutions has remained rather stable since 2008 with about 4 in 10 respondents expressing confidence in them – all the while to little surprise confidence in NATO remains the lowest in the region with people still remembering the military organisation's attacks against Serbia in the Kosovo conflict in 1999.

IMPORTANCE OF RELIGION

Is religion an important part of your daily life? (% yes)



government, the media and judicial system have decreased since 2008 (from 63% in 2008 to 41% in 2010, from 62% to 46%, and from 40% to 32%, respectively). Among Macedonian Albanians, where confidence in the state institutions has tended not to be as pronounced as with Macedonians, there has been a strong drop in trust in the government and courts between 2009 and 2010. Confidence

Religion – just as important or not?

In the light of the declining trust in religious organisations in many of the surveyed countries an analysis of the *Balkan Monitor* questions about people's relationship with mosques and churches should be able to throw a lot of light on the evolution of religious belief in the Western Balkans.

There has been no uniform development around faith in the region. Religion has gained importance as a *part of daily life* for Albanians in Kosovo (the share of those considering it to be *an important part of daily life* went up from 68% in 2009 to 89% in 2010), Macedonia (91% to 97%) and Albania (from 33% to 44%) and for respondents in Montenegro (from 46% to 60%). It has also remained critical for Macedonian Slavs and Croatians, where majorities of around two-thirds of respondents said that

religion was an important aspect of their daily lives.

In Bosnia and Herzegovina, two opposed trends could be observed: while fewer Bosniaks now considered religion to be an important part of their lives (49% vs. 63% in 2006), more Bosnian Serbs and Bosnian Croats stated that religion was important to them (to 81% vs. 59% in 2006 and to 79% from 65% in 2006, respectively)

Perceptions of corruption and organised crime



It is stated in every report about the Western Balkan region, be it a progress assessment by the European Commission or an analysis by a think tank: pervasive crime and corruption are keeping the region's countries from developing into fully functional market democracies and progressing quicker towards European integration. Strong links between criminal networks and political actors get in the way of the implementation of far-reaching anti-corruption reforms, while the principles of good governance cannot take root in a region where businesses often profit from weak states and dysfunctional institutions. Against this backdrop, the election of Ivo Josipovic as president of Croatia in January 2010, after a campaign emphasizing his anti-corruption efforts, was an important signal for the Western Balkans. It seems like citizens are fed up with the lack of integrity among the ruling classes and are beginning to bring forth change via the ballot box. The *Balkan Monitor* has been tracking these latest developments of people's sentiments and experiences around organised crime and corruption.

Levels of perceived corruption in government and businesses remain high

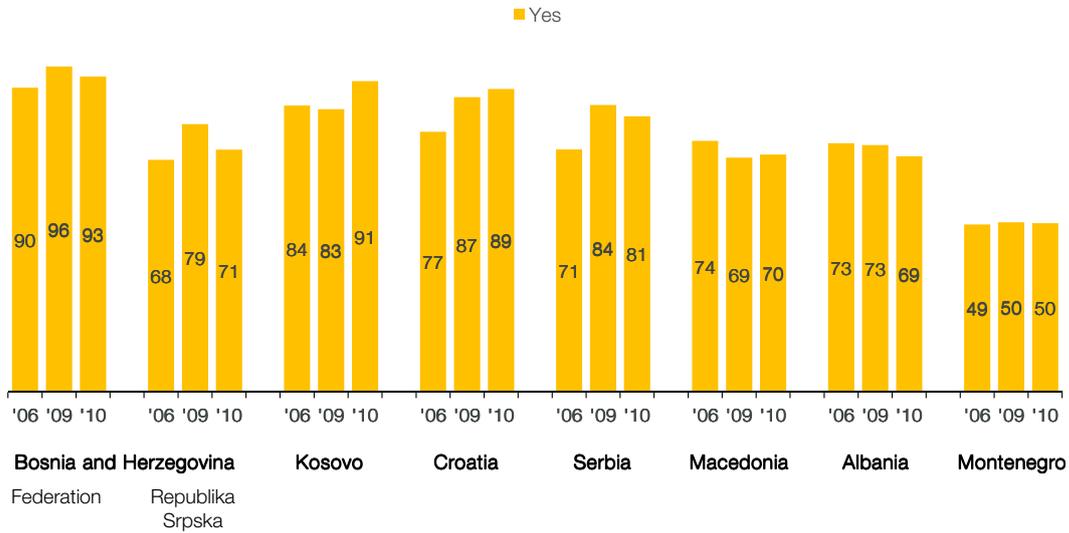
Although in all countries covered by the survey at least half of the citizens thought that corruption was widespread throughout the government as well as within the business world, the shares of respondents reporting this differed substantially across the Western Balkans.

While in Kosovo more than 9 in 10 (91%) respondents thought that governmental corruption was widespread in their country, half of interviewees in Montenegro held this view. The most dramatic change has taken place in Kosovo, where the share of those believing that their government was corrupt has increased by eight percentage points compared to the last wave in 2009. Meanwhile, in

Macedonia the ratio of respondents disagreeing with the statement that governmental corruption was a common phenomenon in their country has fallen by four percentage points (to 13%). An opposite development was registered in Albania, Bosnia and Herzegovina and Serbia, where the proportion of people assuming corruption to be widespread throughout the government has fallen slightly (3-4 percentage points). Within Bosnia and Herzegovina there was a striking difference in the perception of governmental corruption between the two Bosnian entities: while in the Federation 93% of respondents were convinced that corruption was common at the governmental level, the corresponding figure for Republika Srpska was at 71%. In the current survey, a quarter of Montenegrins said that governmental corruption was not prevalent in their country – clearly the highest percentage in the region (an increase of 8 percentage points compared to 2009).

CORRUPTION IN GOVERNMENT

Is corruption widespread throughout the government in [COUNTRY], or not?



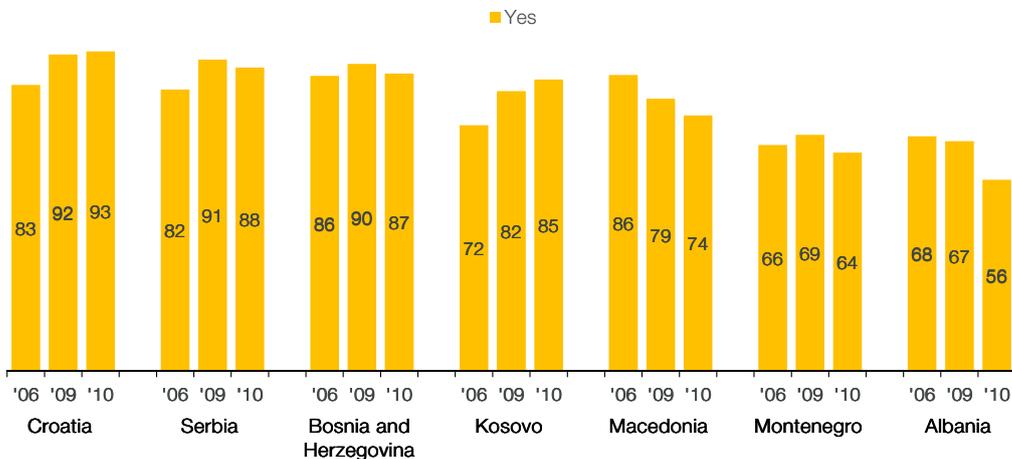
In Croatia, views about the level of corruption in government have stayed relatively stable; 89% said it was widespread.

Albania was the country where business corruption was least often considered to be widespread (56%),

followed by Montenegro (64%). However, respondents in these countries were also the most likely to say they *did not know* or to refuse to answer (19% and 18% respectively). Croatian respondents were the most likely to believe that corruption was common practice within the country's businesses

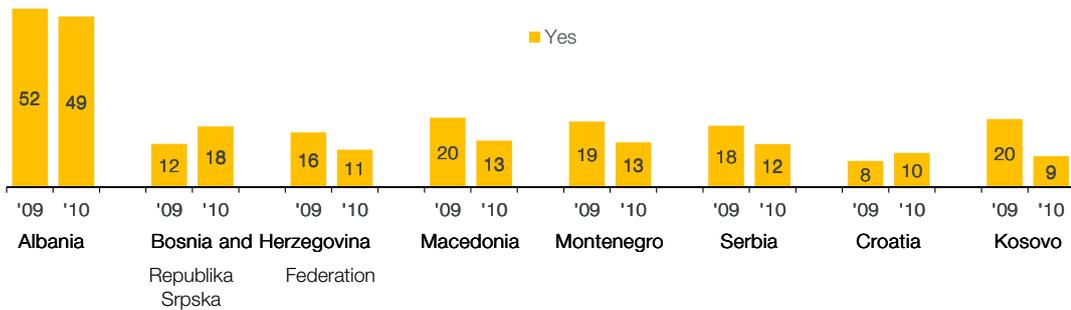
CORRUPTION IN BUSINESS

Is corruption widespread within businesses located in [COUNTRY], or not?



LESS NEED TO OFFER BRIBE IN MOST COUNTRIES

Sometimes people have to give a bribe or a present in order to solve their problems. In the last 12 months, were you, personally, faced with this kind of situation, or not (regardless of whether you gave a bribe/present or not)?

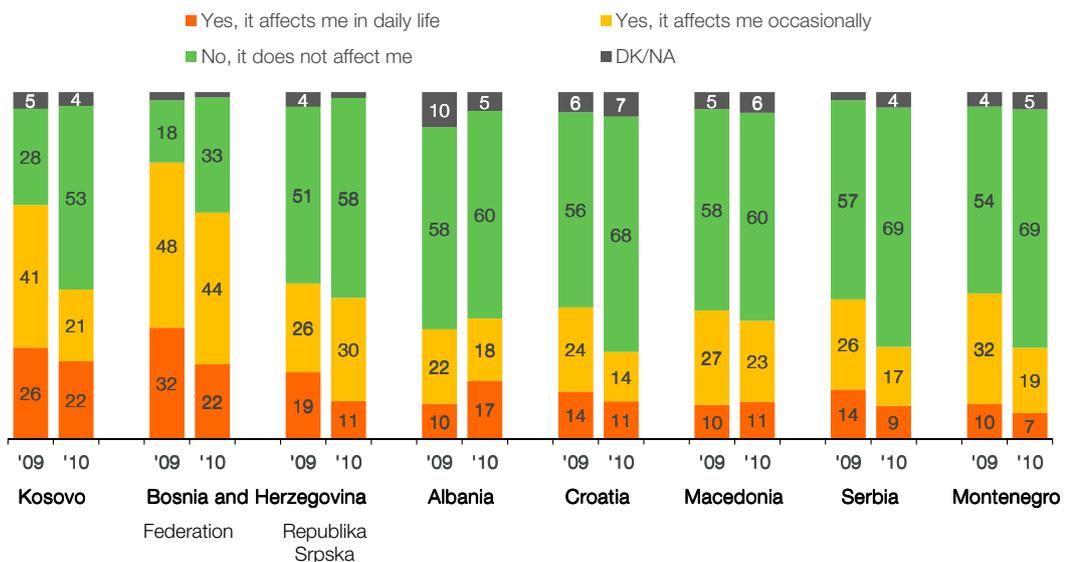


(93%). The most notable change in the past year was registered in Albania: the share of survey participants believing in widespread business corruption has fallen by 11 percentage points. Similar developments took place in Serbia and Bosnia and Herzegovina (down three 3 percentage points),

Macedonia and Montenegro (both minus 5 percentage points). Kosovo, however, saw a slight increase in the number of respondents believing that corruption was prevalent among businesses (an increase of 3 points to 85%).

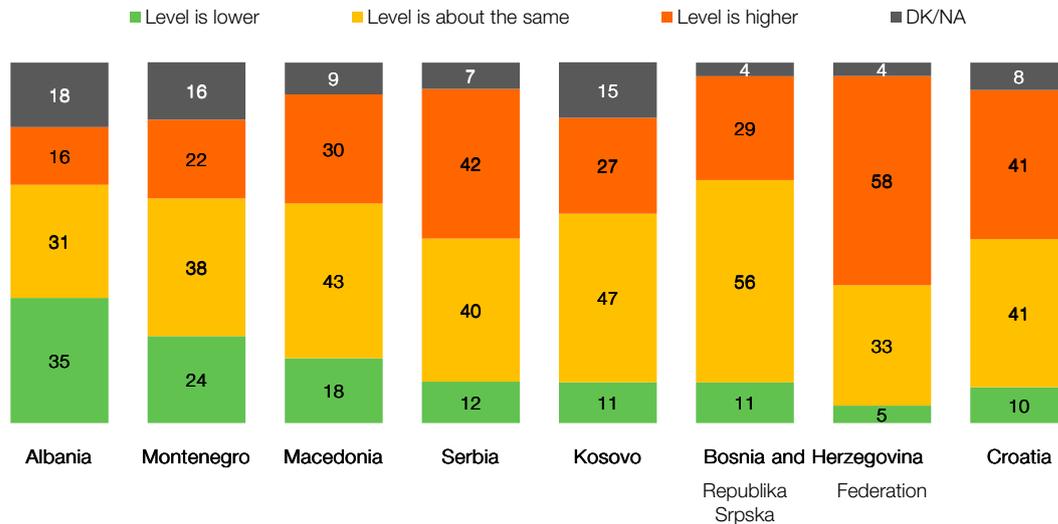
PEOPLE STILL FEEL THE EFFECTS OF ORGANISED CRIME, BUT WITH THE EXCEPTION OF ALBANIA LESS OFTEN

Does the organised crime in [COUNTRY] affect you personally?



MOST COUNTRIES DON'T SEE OVERALL IMPROVEMENT REGARDING ORGANISED CRIME

Do you think the level of organised crime in this country is lower, about the same, or higher than it was 5 years ago?



A positive trend in self-reported petty corruption

In all countries surveyed except for Croatia, the 2010 survey detected a drop in the share of those interviewees who had been confronted with a concrete example of corruption, meaning that they had considered *offering a bribe or present to solve their problems* in the past year. The most positive developments took place in Kosovo, where the proportion of respondents reporting this fell by 11 percentage points (to 9%), Macedonia (minus 7 points to 13%), Montenegro and Serbia (both down 6 points to 13% and 12%, respectively). Albania was again the country with the most respondents who had had to give a bribe, despite a slightly positive trend: 49% said that they had faced such a situation (minus 3 percentage points) and 48% stated that they had not (plus 7 percentage points). Croatian figures were stable. An opposed development could be observed for the two Bosnian entities: in Republika Srpska, respondents reported more often that they had been obliged to bribe (from 12% to 18% of respondents between 2009 and 2010), while in the

Bosnian Federation this figure decreased from 16% to 11% for the same period.

Personal lives now less often affected by organised crime

With the exception of Albanians, respondents across the Western Balkans felt less frequently affected by organised crime than they had in 2009. In Kosovo, for example, 21% of respondents said they were affected in daily life and 22% said organised crime affected them occasionally vs. figures of 26% and 41%, respectively, in 2009. In Albania, the share of respondents saying that their daily lives were negatively affected rose by seven percentage points (to 17%), with the share of those being occasionally affected falling by four points (to 18%).

Organised crime persists and many governments still lack the will to fight

Albania was the only country surveyed where people were more likely to say that the level of

organised crime was now lower compared to the situation five years prior to the survey than to claim the opposite (35% vs.16%). On the other hand, the highest share of respondents saying that the level of organised crime was higher than five years ago was found in Bosnia and Herzegovina (47%), followed – at some distance – by Serbia (42%) and Croatia (41%). When examining the Bosnian results closer, it can be said that the detrimental situation around organised crime was mostly reported in the Bosnian Federation: while in this entity 58% stated that the level of organised crime had risen over the five years before the survey, in Republika Srpska a mere 29% were of such opinion.

While about 4 in 10 respondents in Montenegro, Macedonia and Albania said that their government was doing everything in its powers to fight organised

crime, less than one in five interviewees in Croatia and Bosnia and Herzegovina held this view (17% and 15%, respectively). Important positive developments took place in Montenegro, Albania and Croatia – in the latter country, for example, the share of respondents dissatisfied with their governments' efforts to combat organised crime dropped from by 14 percentage points to 66% since 2009. The opposite was true in Macedonia: here, more people were dissatisfied with the national government's anti-corruption efforts; the share of those satisfied dropped 9 percentage points since 2008 to 40% in 2010.

Migration and mobility



DEJAN ČABRILLO

The great appeal of economic (work-related) migration for the populations of the Western Balkans bears both a risk and an opportunity for the region's development. On the one hand, it is often the most-educated and the brightest that leave their countries to look for better opportunities in Western Europe or the United States. The home countries then miss their talents at a time of societal transformation when they would be needed most. On the other hand, with a limited educational infrastructure in the region, it can be helpful if Balkan citizens leave to gain knowledge and work experience abroad before returning to their home countries at some point to transfer the knowledge they have acquired. Since the economic crisis has diminished work opportunities in some of the traditional host countries of Balkan migrants, this is certain to have a strong effect on the migration plans of Western Balkan residents.

Relative majorities, at least, want to remain in the Balkans

As in past waves of the *Balkan Monitor*, the current survey showed that majorities of respondents in all countries except for Croatia and Kosovo were convinced, in 2010, that there were *better opportunities outside* their countries. Furthermore, even in those two latter countries, those people thinking that a better life could be found abroad outnumbered those who saw equal or better opportunities at home. It was striking, however, that respondents in Albania and Kosovo, traditionally the Western Balkan countries where people were most eager to migrate, were now much less likely to see better opportunities abroad than they were in 2006. In that timeframe, the respective share of respondents fell from 66% to 52% in Albania and from 72% to 48% in Kosovo. An opposite trend was seen in Croatia and Montenegro, where a growing proportion of people were now convinced that opportunities were better abroad. In just two years, their share has risen 38% to 52% in Montenegro and from 31% to 48% in Croatia. In the remaining countries – Macedonia,

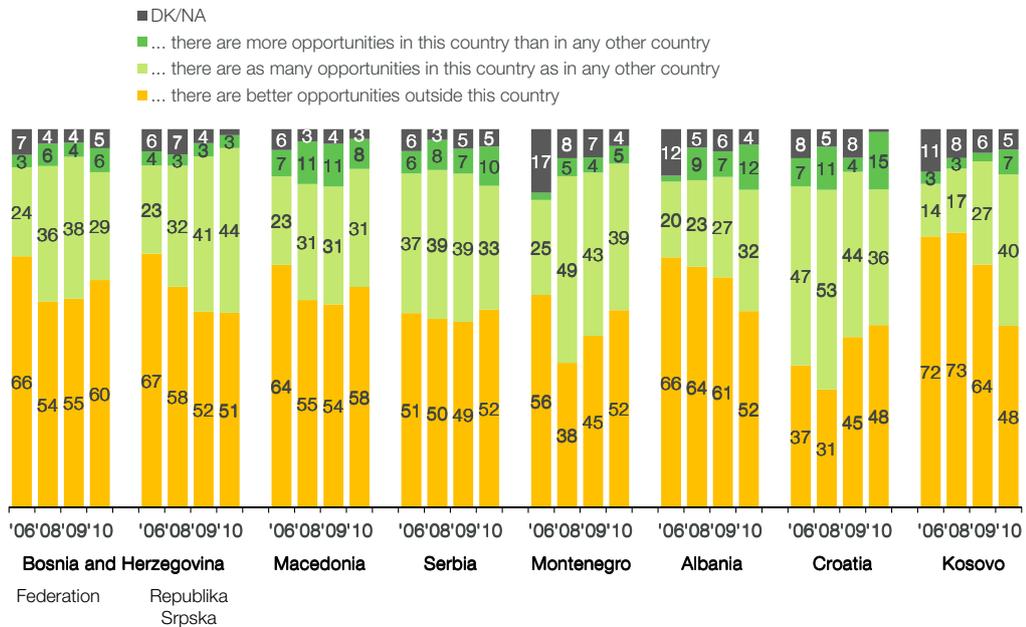
Bosnia and Herzegovina and Serbia – more than half of respondents saw better chances abroad; hardly changed (3-4 percentage points) since 2009.

The high level of respondents seeing limited opportunities in their own countries translates into a relatively high willingness of people willing to move abroad to try their luck. The most people with migration wishes can be found in Albania, where 42% (up from 32% in 2006) stated that ideally, they would like to move to another country. In Macedonia and Kosovo, roughly one-third of respondents could imagine moving to another country, while in Montenegro, Bosnia and Herzegovina and Serbia this share was around one-fifth of respondents. The smallest proportion of people tempted to go abroad was seen in Croatia with only 13% of respondents wishing to migrate.

It should, however, be noted that where respondents said that *ideally* they wished to move abroad (meaning that, for example, there were no ties to family and friends and the respondent had enough money to finance the move) that did not always

IN ALBANIA AND KOSOVO, MORE OPPORTUNITIES NOW SEEN AT HOME

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



lead to those respondents having concrete migration plans. This can be illustrated by recent Gallup research undertaken in the United Kingdom, where a similarly high 30% of respondents said that they would ideally like to leave the country – a wish that was only realised by a minority of those who stated such a wish to move abroad.

In order to further investigate how concrete people's desires to leave their countries were, the *Balkan Monitor* followed up the questions about migration with a series of questions relating to whether people had concrete ideas and plans concerning such a move. For example, people who said they wished to migrate, and could name their intended destination were asked whether they thought they would be moving abroad permanently in the year following the survey. The responses to this question showed that much smaller numbers of Western Balkan residents were actually ready to leave their countries in the short term. For example, of the 42% of Albanians saying that ideally they would like to

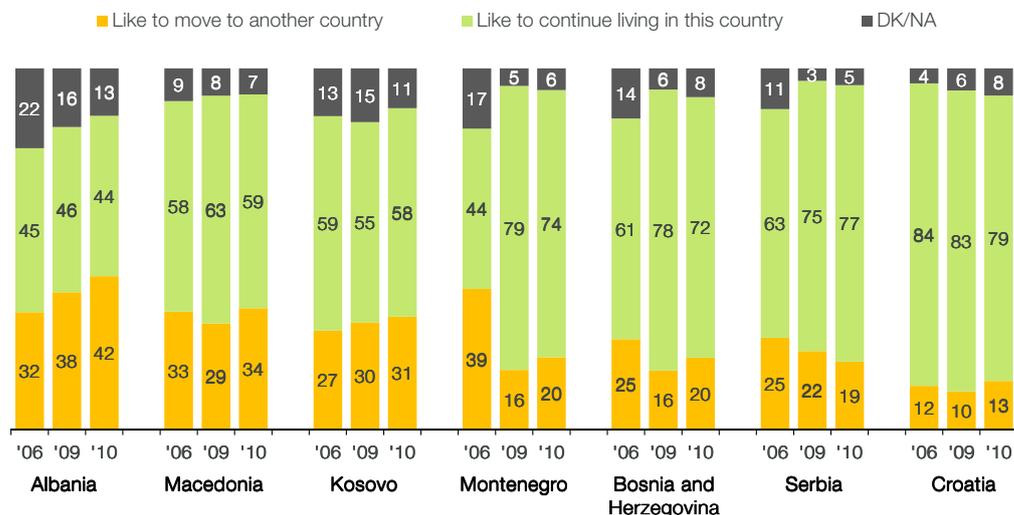
leave the country, only 14% had concrete plans to move abroad permanently. The proportions were even lower in other Western Balkan countries.⁶

Extrapolated onto the population aged 15 years or older (the age group addressed by the *Balkan Monitor*) the survey figures give an idea of the region's migration potential. Based on a total Western Balkan population of 18.7 million (aged 15 and over), roughly 344,000 residents have concrete plans to leave their country *permanently* the year after the interviews (see charts below). Albania had the most inhabitants ready to leave *permanently* with around 140,000 having concrete plans to leave Albania in the 12 months after the interview took place. For the remaining countries, the levels

6 To consult these and related data please consult worldview.gallup.com, the dashboard of the Gallup WorldPoll. The World Poll is a survey undertaken every year by Gallup in more than 130 countries worldwide in national representative samples. You can sign up for trial access to the dashboard free of charge.

MAJORITIES IN ALL COUNTRIES – EXCEPT FOR ALBANIA – WANT TO STAY AT HOME

Ideally, if you had the opportunity, would you like to move permanently to another country, or would you prefer to continue living in this country?



of potential migration were much lower and ranged from 4,000 (Croatia) to 60,000 (Macedonia). In some countries, there were big differences between the numbers of respondents that were planning to leave permanently and those who were considering

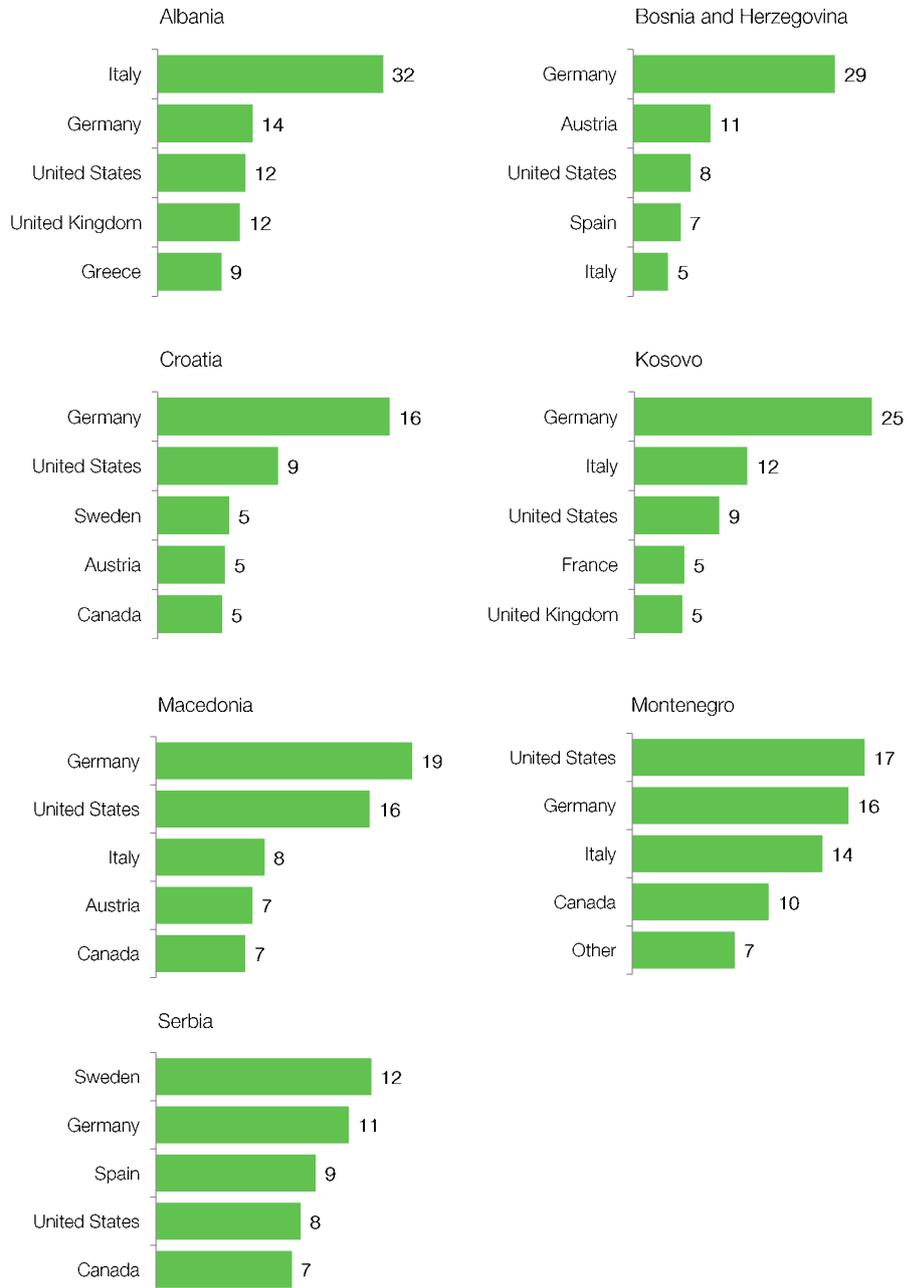
returning. In Kosovo, for example, while an extrapolated 130,000 expressed concrete plans to leave for another country *permanently or temporarily*, only around 30,000 planned to leave the country permanently.

SURVEY RESULTS OF PEOPLE EXPRESSING THE WISH TO LEAVE THEIR COUNTRIES
 EXTRAPOLATED TO COUNTRIES' TOTAL POPULATION (ROUNDED NUMBERS)

	Total population aged 15 or older (Balkan Monitor estimate)	Would like to move to another country	Named a country they would like to move to	Wanted to move permanently or temporarily to another country in the next 12 months	Wanted to move permanently to another country in the next 12 months
Albania	2,360,000	1,000,000	960,000	250,000	140,000
BiH	2,870,000	570,000	530,000	80,000	40,000
Croatia	3,660,000	490,000	360,000	30,000	4,000
Kosovo	1,370,000	430,000	380,000	130,000	30,000
Macedonia	1,600,000	540,000	490,000	110,000	60,000
Montenegro	490,000	100,000	90,000	10,000	10,000
Serbia	6,320,000	1,190,000	1,090,000	110,000	60,000
Western Balkan Total	18,670,000	4,320,000	3,900,000	720,000	344,000

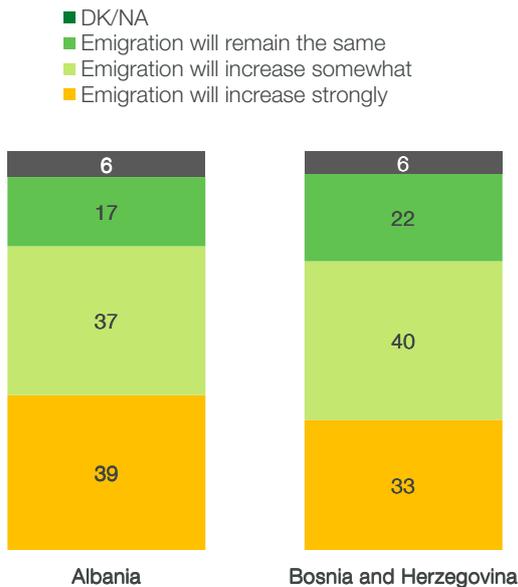
MOST POPULAR MIGRATION DESTINATIONS

To which country would you like to move? Base: those who would ideally like to move to another country, top 5 responses



NO DEFINITE OPINION ABOUT THE IMPACT OF VISA LIBERALISATION IN EITHER ALBANIA OR BOSNIA

What do you expect will happen after the introduction of visa-free travel for Albania/Bosnia and Herzegovina?



Germany leads the way as an intended destination – but not for all

There were great differences in the destinations that people would *ideally* like to migrate to. While Germany was the most popular target for people in Bosnia and Herzegovina (mentioned by 29% of those wishing to leave), Kosovo (25%), Macedonia (19%) and Croatia (16%), respondents in Albania were most attracted by Italy (32%). In Montenegro, the United States was the most popular destination (mentioned by 17% of people with a desire to emigrate), closely followed by Germany and Italy. Interviewees in Serbia had no clear favourite among target countries, but most often stated that they felt attracted by Sweden (12%) with Germany (11%) as a close-up second favourite.

Albanians and Bosnians both divided over the impact of visa liberalisation

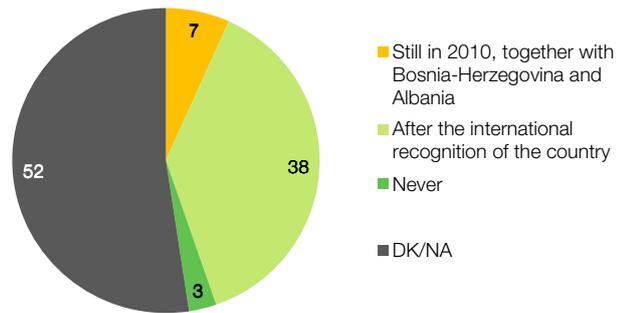
The abolishment of visa requirements for Western Balkan citizens travelling towards the Schengen area has seen much progress since the publication of the 2009 *Balkan Monitor* results. In a first round, visa liberalisation was introduced for citizens of Macedonia, Montenegro and Serbia in December 2009. Now, following major steps forward in the necessary travel-related reforms in Albania and Bosnia and Herzegovina and positive votes in the European Parliament and the EU's Council of Ministers, visa-free travel is expected to come to these countries in December 2010. While that step is eagerly awaited in both states, respondents in both countries were divided over the question whether easier travel towards the Schengen zone would lead to mass emigration. In Albania, almost 4 in 10 (39%) respondents believed that emigration would increase strongly with another 37% believing that it would only increase to a limited extent. A similar picture emerged in Bosnia and Herzegovina, where one-third (33%) of respondents thought that there would be a big increase in the numbers of people migrating abroad. These were slightly outnumbered by 4 in 10 of respondents expecting such migration away from Bosnia and Herzegovina to only increase to a limited extent.

With both Albania and Bosnia and Herzegovina recently having been granted visa-free travel for the near future, the only Western Balkan people requiring visas to enter the Schengen zone would be the residents of Kosovo. Much has been written about the detrimental effects of isolating Kosovars in respect to travel rights, but so far, there have been no clear statements by EU officials regarding future developments in this respect. The effect of that impasse was reflected in the responses of survey

participants in Kosovo to the question about when they thought Kosovo would be granted visa-free travel to the Schengen area. Half of respondents (52%) did not know what to answer, while the next-biggest share (38%) thought that visa liberalisation would only follow international recognition of the country. An optimistic 7% believed that the country would be granted easier travel *together with Albania and Bosnia and Herzegovina* — a development that has been made impossible with the recent decisions by European Parliament and European Council —, while a strongly pessimistic 3% responded that they *never* expected Kosovo to achieve visa-free travel to Schengen countries.

A LACK OF OPTIMISM PERVADES THE VIEWS ABOUT VISA-FREE TRAVEL TO SCHENGEN FOR KOSOVARS

When do you think Kosovo will be granted visa-free travel to the Schengen area? (Base: respondents in Kosovo)



Balkan challenges: ethnic relations and the future of the region



Located on a territory only slightly larger than that of the UK and composed of a total population of about 25 million, the Western Balkan countries contain a striking number of latent conflicts. Ethnic tensions within Bosnia and Herzegovina, genocide cases between Serbia and Croatia before the International Court of Justice, the conflict around Kosovo's independence, Macedonia's name dispute with Greece and many more: it seems unlikely that the region will be able to erase all of its trouble spots in the near future. But progress is slowly becoming visible: with the advent of a more moderate class of politicians in many countries and the recent rapprochement between the leaders of Croatia and Serbia, there are high hopes that a new breeze bringing improved cooperation and interethnic relations might be blowing across the Western Balkans. Even for the most progressive leaders, however, it will be difficult to pursue reconciliatory policies given the strong sentiments related to ethnicity and nationality that are deeply rooted in the minds of many Western Balkan residents.

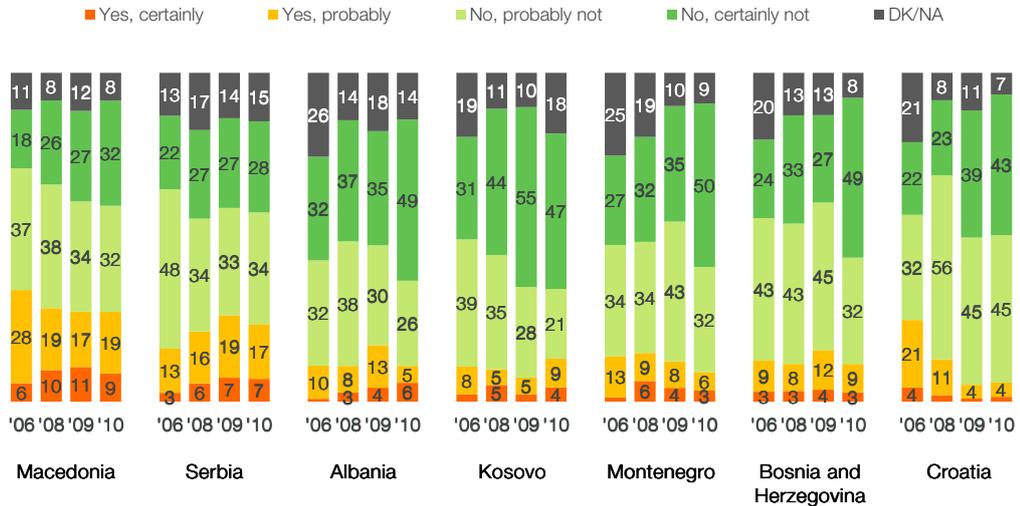
At least one giant step forward has been made in the region in the past decade: since 2001, no major armed conflict has taken place and people on the ground seem to agree with analysts that such an outcome is unlikely in the near future. Asked whether they expected 'war' to break out in the five years to come, large majorities – from 62% (Serbia) to 88% (Croatia) – across all countries were *certainly* or *probably* convinced that an armed conflict was not expected anytime soon. The shares of respondents feeling that 'war' was not likely have grown in all countries – except in Serbia and Kosovo – since 2006. In those two countries, the proportion of respondents thinking that there would not be a 'war' in the near future has decreased by eight percentage points to 62% in Serbia and by two points to 68% in Kosovo. A remarkable development was seen in Bosnia and Herzegovina where in just one

year – between 2009 and 2010 – the share of respondents being *certain* that the risk of war was not imminent went up from 27% to 49%. That means that about 8 in 10 (81%) Bosnians do not expect an armed conflict soon. The fear of 'war' was the highest in Macedonia and Serbia where 28% and 24% of respondents, respectively, held it *probable* or *certain* that there would be an armed conflict.

While Balkan residents now see less possibility of an armed conflict, this has not been translated into a desire for greater cooperation between the Balkan neighbours. While in all countries, except Montenegro, relative majorities said that their country's neighbourly ties were *not strong enough*, those proportions have not been growing everywhere in past years. In Albania and Kosovo, the share of respondents finding neighbourly relations

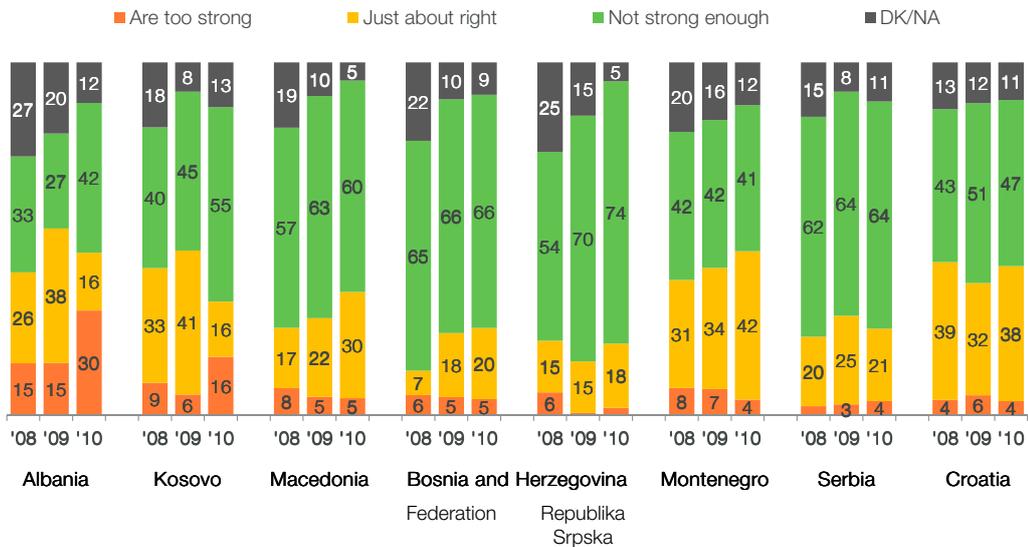
LITTLE BELIEF IN THE POSSIBILITY OF WAR IN THE REGION

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



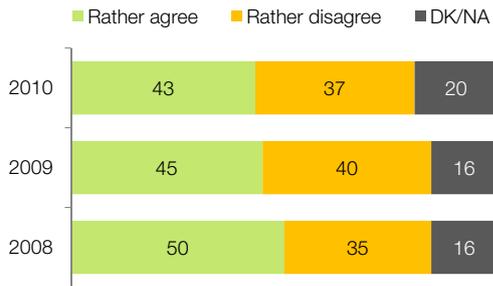
MUCH SUPPORT FOR STRONGER NEIGHBOURLY TIES ACROSS THE REGION – BUT NOT GROWING EVERYWHERE

What would you say about your country's ties to its neighbours in the region?



DIVISION OF KOSOVO TERRITORIES IS NOT AN OPTION FOR SERBS

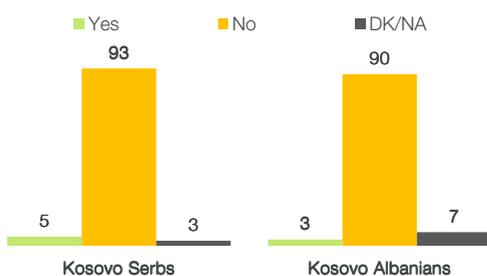
Do you rather agree or disagree that as part of a future solution Kosovo could be partitioned?
(Base: respondents in Serbia)



too strong has risen significantly in the past year (from 15% to 30% in Albania and from 6% to 16% in Kosovo). In Macedonia, Montenegro and Croatia, the growth area between 2009 and 2010 was in those who thought that relations were *just about right* and did not need strengthening. The greatest shares of supporters for more regional cooperation were seen in Bosnia and Herzegovina (69%), Serbia (64%) and Macedonia (60%). While in the Bosnian Federation entity the share of people wanting stronger ties remained stable two-thirds of respondents, in Republika Srpska people seem more and more

NO INTEREST IN AN EXCHANGE OF TERRITORIES TO SOLVE KOSOVO DISPUTE

Would you support the exchange of the Serb-populated territories in North Kosovo for the Albanian-populated territories in South Serbia?



interested in more neighbourly cooperation; the share of respondents in that entity regarding ties to neighbouring countries as insufficient increased from 54% to 74% between 2008 and 2010.

The *Balkan Monitor* Focus On Kosovo's independence, published in July 2010⁷, showed that public opinion is becoming less conciliatory following the unilateral declaration of independence. This tendency was confirmed in the latest wave of the *Balkan Monitor*: the proportion of respondents in Serbia thinking that a division of Kosovo could be part of a solution to the conflict has fallen from 50% in 2008 to 43% in 2010. For people living in Kosovo, such a solution is even less attractive: in 2010, 90% of Kosovo Albanians and 92% of Kosovo Serbs were opposed to a division of the Kosovo territory.

Variations of this suggested solution find just as little support. Regarding the proposal that Serb-populated territories in North Kosovo could be exchanged for the Albanian-populated territories in South Serbia, 93% of Kosovo Serbs and 90% of Albanians answered with a clear 'No'.

With the declaration of Kosovo's independence, some Balkan analysts debated that the idea of creating a 'Greater Albania' on a territory that would comprise all of the areas where ethnic Albanians currently lived – Albania, Kosovo and parts of Macedonia – could gain new support. In response to this speculation, the *Balkan Monitor* asked Albanians in the Western Balkan region whether they would support such a concept. The responses were mixed. In Albania, around two-thirds of respondents supported the idea, although support fell by five percentage points between 2009 and 2010 (from 68% to 63%). Among Kosovo Albanians, support for a 'Greater Albania' is growing strongly: from 54% in 2008 to 81% in 2010. Macedonian Albanians, finally, also increasingly support a 'Greater Albania', albeit at a lower level than their ethnic fellows in Kosovo: the proportion advocating a new country assembling all ethnic Albanians has grown from 44% in 2008 to 53% in 2010.

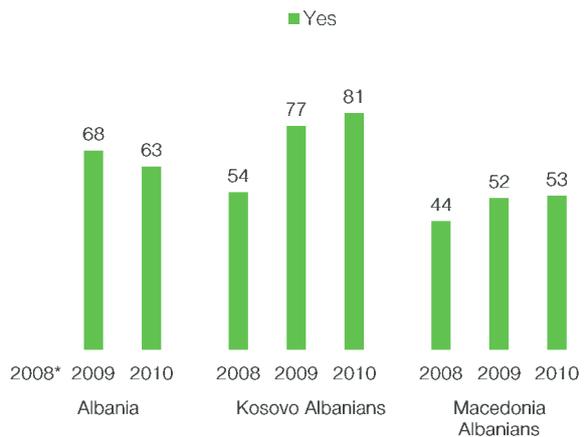
⁷ See www.balkan-monitor.eu/files/Gallup_Balkan_Monitor-Focus_On_Kosovo_Independence.pdf.

At the northern end of the Western Balkan region, Croats were asked how they felt about the 'Piran Bay agreement' struck between Slovenia and their country in November 2009. This ended the Slovenian veto on Croatian progress in the EU integration process. The Croat population seemed divided over the issue: while a relative majority of respondents (41%) did not support the agreement, one-third (31%) gave their support and 28% did not know what to think or gave no answer. Just 7% were convinced that the agreement was more to Croatia's advantage; 29% thought that both countries profited equally and 38% – the biggest share – thought Slovenia was overreaching Croatia in the agreement's outcome.

Given the role NATO played in the Kosovo conflict in 1999, the discussion around the organisation's involvement and enlargement in the region is a sensitive one. In both Montenegro and Serbia, the issue of whether or not they should join the Alliance is being actively discussed. While in Montenegro public opinion was rather supportive – 38% of respondents supported NATO accession, while 24% thought that it would be a *bad thing* –, interviewees in Serbia were still not ready to see a partner in their former opponent: only 13% would support

INTEREST IN 'GREATER ALBANIA'
RISING IN KOSOVO AND MACEDONIA,
DECREASING IN ALBANIA

Would you personally support the formation of Greater Albania? (Base: respondents in Albania (question was only asked in that country in 2009 and 2010), Albanians in Macedonia and Kosovo)

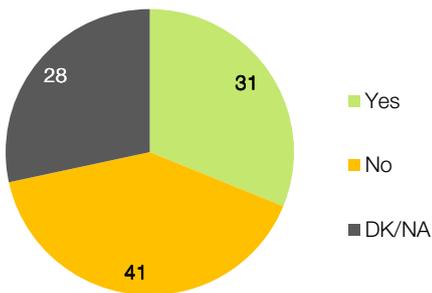


NATO accession while 52% were opposed to this outcome.

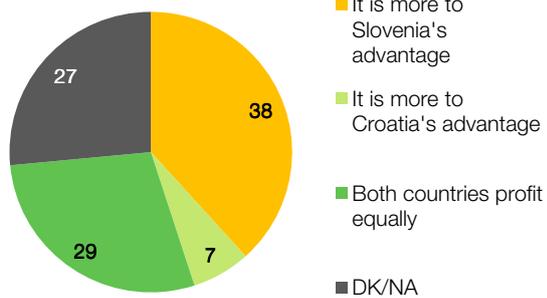
Regarding Serbia's accession to another association of states – the EU – the question of the

MOST CROATS FEEL THAT THE PIRAN BAY AGREEMENT
IS MORE ADVANTAGEOUS FOR SLOVENIA

Do you support the Piran Bay agreement struck between Slovenia and Croatia in November 2009?



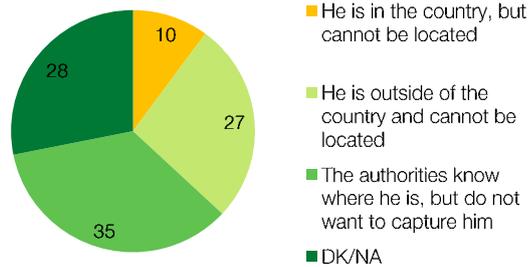
In your opinion, who profits more from the Piran Bay agreement?



country's cooperation with the International Criminal Tribunal for the former Yugoslavia (ICTY) is of crucial importance. Some EU member states stated that they would block Serbia's progress in EU integration efforts if Ratko Mladic, an ex-Bosnian Serb Army general accused of the 1995 Srebrenica massacre, was not detained first. About one-third (35%) of respondents in Serbia were suspicious of their government's role in that case, saying that *the authorities know where he is, but do not want to capture him*. A similar share of respondents (37%), however, believed that Mladic was either in the country or abroad and could not be located.

A THIRD OF SERBS CONVINCED AUTHORITIES KNOW MLADIC'S WHEREABOUTS

What do you think: the Serbian authorities don't capture Ratko Mladic because...



Conclusions

Since 2006, when the *Balkan Monitor* started monitoring societal developments in the Western Balkan region, there has been a consistent hope that the indicators for people's material situation would finally begin to swing upwards. As the 2010 survey results show, this hope has not materialised. The region is still suffering from the aftershocks of the financial and economic crisis and more households are struggling to cope financially compared to 12 months ago. The picture is not totally bleak; there is less fear of war breaking out and, at last, people see less need to bribe someone in order to get things done. Dark clouds have been rolling over the Balkans for many years, can we see a brighter outlook – at some time in the future? That depends on many factors.

The number of households struggling 12 months ago was dramatically high, and that number has increased. On top of that, a reduced flow of remittances from Balkan migrants – due to the impact of the crisis abroad – seems likely to strike heavily on an already difficult domestic situation. This is especially visible among Kosovo Albanians: traditionally the most upbeat respondents in *Balkan Monitor* surveys; they now have many more financial problems and less confidence in their countries' institutions and future.

Economically then, there is much work to be done. However, while regional conflicts are still present in people's minds and views remain polarised, local disputes seem to be losing their edge. Fewer people fear armed conflict and trust between ethnic groups is slowly returning. Maybe the root cause of most people's blatant dissatisfaction with their governments and other national institutions also lies within this slow return to normality in Balkan streets. People do not want more disputes; they want solutions to the everyday problems that are staring them in the face. Balkan residents also see endemic corruption in governments and in the world of business, and they cannot help but see the ubiquitous criminal networks. However, as responses to the 2010 *Balkan Monitor* show – one of the positive stories in this year's survey lies in this area of crime and corruption. People say there is less need to pay bribes in order to get things done and fewer respondents, in most countries, now feel affected by organised crime.

Recent developments around visa liberalisation have not increased the European Union's popularity in the Balkans – two of the countries that were granted visa-free travel in 2009, Serbia and Macedonia, have even seen a drop in EU support during the past year. But all countries, except for Croatia, have strong majorities ready to vote 'Yes' in the event of an EU referendum; furthermore, the region's residents place high hopes in the positive effects that EU accession would have on their countries.

So what of those dark clouds? Can we say that some of those may have a silver lining? The *Balkan Monitor* team feel more positive about the survey results than in any of the previous years. Considering that the whole region, like the rest of Europe, has suffered as a result of the financial crisis, the results should be seen in a positive light. Along with hopes for a peaceful future and reduction in petty corruption, we can add improvements in the way that respondents feel about being politically represented and the wish for better relations between neighbours in several countries. Those are all positive results and are reasons to start feeling better about the clouds still rolling over the Balkan region.

ABOUT THE BALKAN MONITOR

In order to track the societal transformation process of Western Balkan countries, the *Balkan Monitor's* aim is to provide behavioural economics data that will provide a realistic picture of the region as seen

from the inside. It is complemented by a website (www.balkan-monitor.eu) that gives access to all data sets collected since 2006 and that contains a comprehensive range of tools for further examination of the region and country breakdowns. The results from past waves of the survey reflect the complex societal developments taking place in the Western Balkans. In such an extremely dynamic region, many changes are likely to occur in years to come. These will be in the political, social and economic landscapes of the countries concerned, as well as in public opinion on the ground. These events will warrant close attention and that will be guaranteed in the next waves of the *Balkan Monitor*.



Sarajevo, Bosnia and Herzegovina

Methodology

Each year, the Gallup Balkan Monitor surveys residents in all countries that make up the Western Balkans. Gallup conducts 1,000 face-to-face interviews, in the respondents' homes in Albania, Bosnia and Herzegovina, Croatia, Kosovo, Macedonia, Montenegro and Serbia, using a standard set of core questions that has been translated into the languages of the respective country. Supplementary country-specific questions are asked in addition to core questions. On average, the face-to-face interviews take approximately 45 minutes. Gallup is entirely responsible for the management, design, and control of the Balkan Monitor survey.

For over 75 years, Gallup has been providing information in an objective, reliable, and scientifically-grounded manner. Gallup is not associated with any political orientation, party, or advocacy group and does not accept partisan entities as clients. The identities of all surveyed respondents will remain confidential.

QUESTION DESIGN

Many of the Balkan Monitor questions are items that Gallup has used since the survey's inception in 2006. When developing additional questions, with input from the European Fund for the Balkans, Gallup employs its network of research and political scientists to improve the understanding of key issues with regard to question development and construction, and data gathering.

TRANSLATION

Questionnaires are translated into the major languages of each country. Gallup strictly adheres to a system of back-translation. The translation process starts with an English source version. A person proficient in both the original and target languages translates the survey into the target language. A second person then translates the language version back into English. Finally, this version will be compared with the original version and refinements made to the target language questionnaire whenever necessary.

INTERVIEWERS

Gallup's fieldwork partners in the region select their interviewers based on experience in survey research studies and conduct in-depth training sessions with local field staff prior to the start of data collection. A training manual is also provided to assist the fieldwork team and to ensure consistency and a structured approach.

SAMPLING AND DATA COLLECTION METHODOLOGY

Population estimates are based on data from the latest censuses, key statistics and migration data, as well as on local institutions' population and household estimates.

All samples are probability-based and nationally-representative of the resident population aged 15 and above. The coverage area is the entire country including rural areas and the sampling frame represents the entire civilian population of the above-mentioned age group.

The sample type used is a stratified three-staged probability sample, with around 100 primary sampling units in each country, randomly selected in a proportional manner with boosted subsamples to better represent certain regions – with post-stratification weighting to reflect true population proportions. The three stages are the following:

First, polling station areas are selected randomly (with a methodology called ‘probabilities proportional to size’, PPS), being approximately the size of 200 households, serving as Primary Sampling Units (PSUs) for the national samples. The sample is allocated in fixed-size clusters (typically 10 interviews per PSU) across the sampled polling station areas.

Second, households are selected with the help of a standard random route technique starting from a given address identified within the polling station area. Unless an outright refusal occurs, interviewers make up to three attempts to survey the sampled household. To increase the probability of contact and completion, attempts to contact the household or the eligible respondent are made at different times of the day, and where possible on different days. If an interview cannot be obtained at the initially targeted household, a simple substitution method is used.

As a last step, respondents are randomly selected within the selected households. If someone answers the door, based on the so-called Kish-grid selection in most countries (in Croatia, the household member with the most recent birthday is selected). Thus, interviewers select the respondents with equal probability within households.

The person interviewed must be:

- Aged 15 or older
- A permanent resident of the household (he/she only has to live there, we do not care whether he/she is administratively registered as living elsewhere)
- The only household member interviewed
- Interviewed individually without disturbances or suggestions from anyone else.

There may be cases of severe physical handicap, mental disorder, or senility, which will prevent the respondent from being able to take part in the interview.

DETAILED SAMPLE ALLOCATION WITH “BOOSTED” REGIONAL OVERSAMPLES

TOTAL	7000
Serbia	1000
Vojvodina	250
Serbia (rest of)	750
Kosovo	1000
“Serbian” Northern part + enclaves	250
Rest of Kosovo, representative	750
Montenegro	1000
Albanian part (Tuzi + Ulcinj and surrounding)	350
Rest of Montenegro	650
Macedonia	1000
Areas with Albanian majority (North-west part)	300
Macedonian majority	700
Bosnia and Herzegovina	1000
Herzegovina (Croat part)	225
West Herzegovina	100
East Herzegovina	125
Republic Srpska	425
RS West	200
RS East	115
RS South	110
Bosnia (Bosniak part)	350
Rest of Bosnia	120
Sarajevo	130
Cazin	100
Albania	1000
North-West (Skhoder)	250
Central part (Tirana and rest)	450
South (Sarande)	300
Croatia (proportional allocation)	1000

DATA WEIGHTING

Data weighting is used to ensure a nationally-representative sample for each country. First, design weights are constructed to account for disproportional sampling across regions and for the unequal sampling probabilities of individuals as a function of the household size, as residents in large households will have a lower probability of being selected for the sample.

Second, post-stratification weights are constructed. Population statistics and reliable consensual estimates are used to weight the data (by region, gender, age, education, economic activity or socio-economic status).

QUALITY CONTROL

Quality control back-checks (in person, by telephone or by post) are carried out and documented in a pre-specified form covering at least 10% of respondents. Quality control back-checks of respondents involve a short interview with the respondent (whether by telephone or in person).

MARGIN OF ERROR

The maximum margin of error is calculated around reported proportions for each country-level data set, assuming a 95% confidence level. The survey results are only valid between the limits of a statistical margin caused by the sampling process. This margin varies based on three factors:

The sample size (or the size of the analysed part in the sample): the greater the number of respondents, then the smaller the statistical margin will be;

The result in itself: the closer the result approaches 50%, the wider the statistical margin will be;

The desired degree of confidence: the more “strict” we are, the wider the statistical margin will be.

The following example illustrates the principle:

- One question has been answered by 1,000 people;
- The analysed result is around 50%;
- We choose a significance level of 95 % (this is the level most often used by statisticians, and is the one chosen for the table shown below);

In this illustrative case, the statistical margin is: (+/- 3.1%) around the observed 50%. As a conclusion: the result for the whole population lies between 46.9% and 53.1%.

Hereafter, the statistical margins computed for various observed results are shown, on various sample sizes, at the 95% significance level.

Various sample sizes are in rows; various observed results are in columns:

	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%
N=50	6,0	8,3	9,9	11,1	12,0	12,7	13,2	13,6	13,8	13,9
N=500	1,9	2,6	3,1	3,5	3,8	4,0	4,2	4,3	4,4	4,4
N=1000	1,4	1,9	2,2	2,5	2,7	2,8	3,0	3,0	3,1	3,1
N=1500	1,1	1,5	1,8	2,0	2,2	2,3	2,4	2,5	2,5	2,5
N=2000	1,0	1,3	1,6	1,8	1,9	2,0	2,1	2,1	2,2	2,2
N=3000	0,8	1,1	1,3	1,4	1,5	1,6	1,7	1,8	1,8	1,8
N=4000	0,7	0,9	1,1	1,2	1,3	1,4	1,5	1,5	1,5	1,5
N=5000	0,6	0,8	1,0	1,1	1,2	1,3	1,3	1,4	1,4	1,4
N=6000	0,6	0,8	0,9	1,0	1,1	1,2	1,2	1,2	1,3	1,3

With sample sizes of 1,000 respondents per country, the maximum margin of error for the Gallup Balkan Monitor is +/- 3.1%.

DATE OF FIELDWORK FOR SURVEY WAVE 2010

18 June 2010 – 19 July 2010

About the Fund

BRINGING THE WESTERN BALKANS CLOSER TO THE EUROPEAN UNION

The European Fund for the Balkans is a multi-year joint initiative of European foundations including the Robert Bosch Stiftung, the King Baudouin Foundation, the Compagnia di San Paolo and the ERSTE Foundation.

The Fund is designed to undertake and support initiatives aimed at bringing the Western Balkans closer to the European Union through grant-making and operational programmes; as such, it is focused on individuals and organisations from the Western Balkans region.

As a direct follow-up to the International Commission on the Balkans (2004-2006), the Fund embodies the “EU Member State Building Strategy” with its priorities focusing on the development of functioning state administrations and constituency-building.

OBJECTIVES

The Fund's objectives are:

- to encourage broader and stronger commitment to the European integration of the Western Balkan countries and societies;
- to strengthen efforts undertaken by a range of stakeholders in this process, with a view to developing effective policies and practices in the region and in the EU;
- to support the process of member state building as envisaged by the International Commission on the Balkans; in particular by building constituencies in the societies of Southeast Europe that will be offered an opportunity to gain experience of – and learn about – Europe and the EU.

PROGRAMMES

To pursue its goals, the Fund develops grant-making and operational programmes in four main areas:

1. **Envisaging Europe**
Supporting research and policy development projects as well as media outreach initiatives
2. **Practising Europe**
Enhancing the professional and administrative capacities of young Balkan government officials in the EU integration process.
3. **Experiencing Europe**
Allowing young generations in the Western Balkans to gain experience of – and learn about – Europe and the EU.
4. **Developing Policies For The Balkans**
Enhancing the public image of the Fund and its contribution in policymaking for the EU integration of the Balkans through joint initiatives and partnerships.

PUBLIC PRIVATE PARTNERSHIP

The Fund is open to other private and public donors and it is designed to engage not only European funders already active in the Balkans, but also public and private donors which have not worked in the region until now, or wish to leverage their own funding and increase their impact.

The Fund is currently hosted by the Network of European Foundations – NEF (Brussels) which provides legal and administrative assistance.

CONTACT:

EUROPEAN FUND FOR THE BALKANS
Resavska 35
11000 Belgrade
Serbia
Tel: +381.0.11.30.33.662
info@balkanfund.org
www.balkanfund.org

About Gallup Europe

THE PREMIER TRUSTED SOURCE IN UNDERSTANDING HOW EUROPEANS THINK AND BEHAVE

Gallup is a global research-based consultancy in applied behavioural economics that helps leaders at every level of business, government and society improve organisational performance by understanding the voice of their constituencies. Gallup has been operating in Europe since 1937. By exploring the opinions and attitudes of citizens, Gallup facilitates the understanding of complex European and world issues and helps decision-makers shape their agendas. Gallup believes that collecting and sharing information is a vital part of policy-making and a key step in empowering citizens.

GALLUP IN ACTION IN THE EU & BEYOND

With over 75 years of experience, Gallup provides opinion polling, policy-related measurement and consultancy services for both public and private organisations. It can address the general public as well as specific target groups: decision-makers, youth, minorities, etc.

Gallup leads in the field of global in-depth surveys, relying on a worldwide network with a proven track record of efficiency and a high level of professionalism.

MAKING SENSE OF OPINIONS & FEELINGS

As a pioneer in applied social research, Gallup measures citizens' awareness and attitudes towards social, political and economic matters. Gallup has also become a champion at assessing the impact of policies and services in all areas as well as measuring the wellbeing and quality of life of constituencies at a global level.

As the current provider of the European Commission's Flash Eurobarometer, Gallup conducts over 400,000 interviews per year on subjects ranging from entrepreneurship and employment to education, and from European values to global challenges.

CUTTING-EDGE TECHNIQUES & COMPREHENSIVE SOLUTIONS

Offering all standard survey techniques, Gallup's tailor-made solutions can be complemented by in-depth statistical analysis and cutting-edge data visualisation tools.

A FAST & QUALITY SERVICE

With unprecedented speed of delivery, Gallup serves all stakeholder groups ranging from national governments and European institutions to business, media, civil society organisations and academia.

Gallup strictly complies with ISO norms, ESOMAR and WAPOR standards, and takes pride in a reputation for reliability, accountability and transparency at all levels.

CONTACT

GALLUP EUROPE
Avenue Michel-Ange 70
1000 Brussels
Belgium

Tel: +32.2.734.54.18
contact@gallup-europe.be

www.gallup.com/europe
www.gallup.com

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Balkan Monitor

Insights and Perceptions: Voices of the Balkans

in partnership with the

European Fund for the Balkans