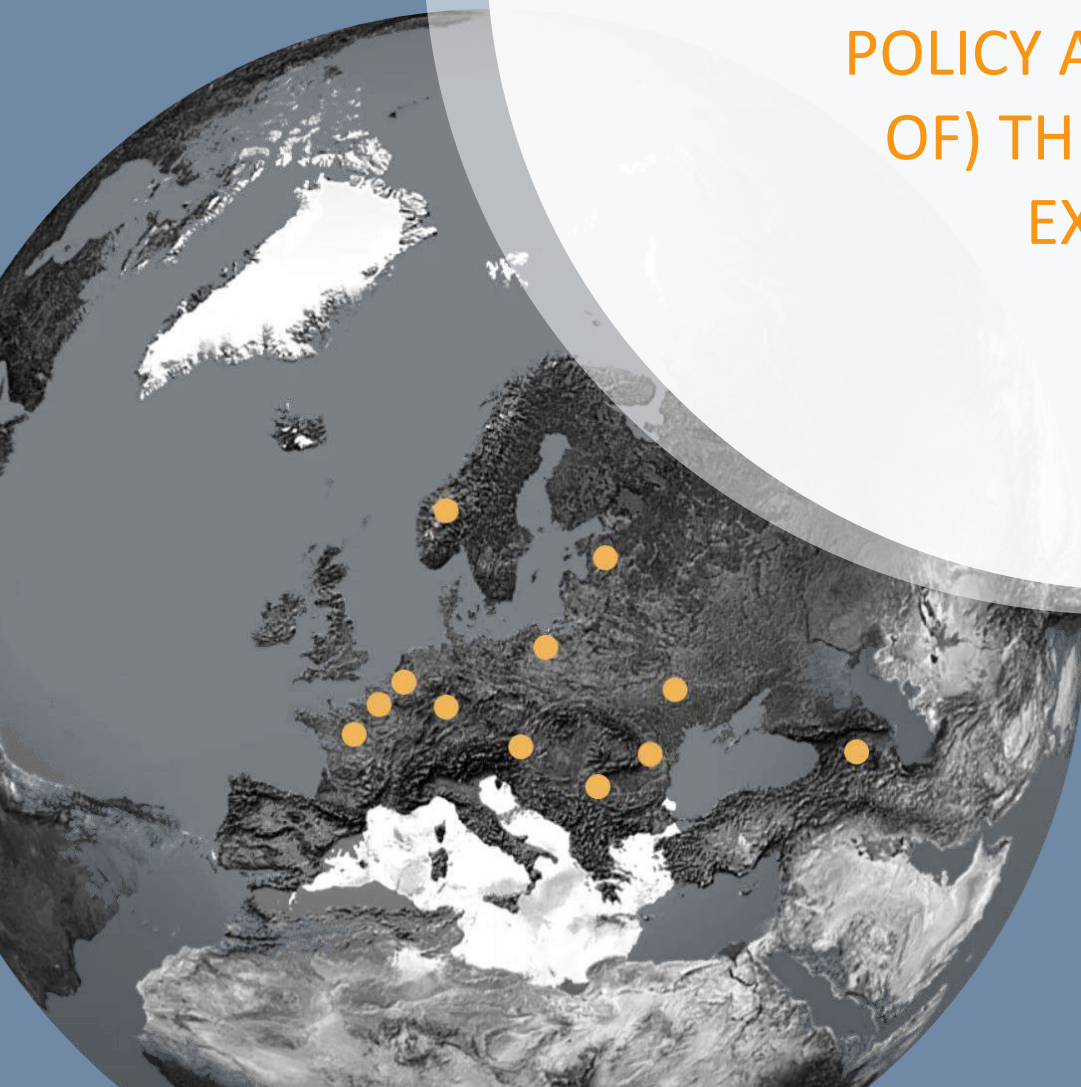




MAPPING EXISTING
SURVEYS AND
PERCEPTIONS THAT
ACTORS IN EN & WB
COUNTRIES HAVE ON (THE
POLICY AND (IN)ACTIONS
OF) THE EU AND OTHER
EXTERNAL ACTORS



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CONTENTS

1. INTRODUCTION	3
2. PERCEPTIONS OF EXTERNAL ACTORS IN THE COUNTRIES OF THE WESTERN BALKANS	5
2.1. CONTEXT	5
2.2. EXPLORATION OF STATE OF THE ART (SURVEY DATA)	9
2.3. THREATS AND OPPORTUNITIES	28
3. PERCEPTION OF EXTERNAL ACTORS IN THE CANDIDATE COUNTRIES OF THE EASTERN NEIGHBOURHOOD	31
3.1. CONTEXT	31
3.2. EXPLORATION OF STATE OF THE ART (SURVEY DATA)	33
3.3. THREATS AND OPPORTUNITIES	58
4. COMPARATIVE TAKEAWAYS.....	61
4.1. KEY POLICY AREAS.....	61
4.2. MAIN PLAYERS IN THE TWO REGIONS.....	63
REFERENCES.....	65

1. INTRODUCTION

The mapping analysis presents and compares various data from surveys and polls that have been carried out in the six candidate countries of the Western Balkans (WB6): Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia, and Serbia, and the three of the Eastern Neighbourhood (EN3): Georgia, Moldova, and Ukraine, which reflect on the citizens' perception of external actors in both regions. Considering that the countries of both regions aspire towards membership of the European Union, the EU is a key actor which forms a focus for many surveys and polls. Other key external actors include the US, Russia, Turkey, and China.

In providing information on the perceptions of external actors, our aim is two-fold. Firstly, we want to highlight the main concerns that citizens of the countries of the WB6 and the EN3 have of their own countries and their policies relevant to the relationship with external actors (foreign policy, security, economy, democracy). Secondly, the aim is to see what they think of the various processes and the different external actors which affect these policies. For instance, what is the level of support that citizens have for EU accession? Do citizens think that their country's foreign policy should be more in support of EU/Western countries or Russia? Is there another actor that they would instead engage with? These questions have been part of numerous polls and surveys in the two regions and form an important pillar of information for decision makers. With this mapping, we integrate the findings of the data already gathered by trusted institutions to set the basis for the following stages of field research.

This research will also serve to complement the other publications and analyses that are part of the REUNIR project and which include threat scans to these regions' economic, security and democratic development¹. This assessment includes expert views on the potential threats facing the two regions, including official strategic documents and an analysis of developments in the countries of the region, including investments and other types of diplomatic engagement. With this mapping analysis the aim is to see the perceptions of citizens to gain a better understanding of how the developments in other research of the REUNIR project are reflected on the ground, as a building block for future research within the project.

Methodology

The mapping analysis covers a period of five years (2020-2024) with the aim of giving the most recent data on the perception of external actors in the countries of the Western Balkans and the Eastern Neighbourhood countries. The data in this mapping analysis are taken from credible sources including but not limited to the International Republican Institute (IRI) and the Directorate for European Integration (DEI), the National Democratic Institute, and Sociological Group Rating among others (see the References section at the end of the paper). These data sources provide reliable comparable data over the set period of interest. In addition, other sources have been included to provide various perspectives and ensure that the data presented here is representative and reflects the results of various surveys.

¹ REUNIR (2024). The Methodology for Threat Assessment to be Conducted in WP3, WP4. WP5. CEPS. Available at: <https://reunir-horizon.eu/the-methodology-for-threat-assessment-to-be-conducted-in-wp3-4-and-5/>



The data is structured into five main areas that are relevant to the relationship with external actors in these countries: policy priorities; economic interests; security issues, social issues and cultural ties. The analysis also includes the discussion of local perceptions of threats and opportunities presented by the external actors in general and regarding their ties to countries' policies.

2. PERCEPTIONS OF EXTERNAL ACTORS IN THE COUNTRIES OF THE WESTERN BALKANS

2.1. Context

The countries of the Western Balkans are all aspiring members to the European Union. In recent years, there have been more actors that are active in the region. While the US and countries of the EU, as well as Russia, have had a longer involvement in the region, Turkey's and China's influence has been growing. In the case of Turkey, because of the history of the Ottoman Empire, there have been more attempts at a cultural and religious rapprochement. China is more present economically, though, like Turkey, it has also established cultural centres in various capitals in the region. In addition, the Russian full-scale invasion of Ukraine has also had repercussions in the region, especially in terms of foreign policy. While most countries have joined and supported the EU sanctions on Russia, one country notably has not: Serbia. Within this context, the surveys include data on perceptions of these external actors as well as how the countries of the region itself are perceived, considering that after the violent wars that marked the end of Yugoslavia, there are still tensions between actors within the region that also influence the countries' policies and perceptions of external actors.

Albania

Albania's road towards democratic consolidation follows the fall of the communist regime and the ensuing civil unrest which marked the end of the 1990s. This included the fall of a Ponzi scheme which also brought down the first democratically elected government². The consolidation of democracy in the Albanian context has meant a strong focus on the strengthening of the rule of law and the independence of judiciary, as corruption and organised crime are two issues that still affect Albanian society and politics. In recent years, Albania has made progress in the area of rule of law, and was rewarded with an opening of EU accession negotiations in October 2024³. There is a wide consensus in Albanian politics for EU accession, and there is also popular support, as citizens see the EU conditionality as a force for democratisation⁴.

Albania has a good relationship with most of its neighbours, although it has recently had an issue with Greece, an EU Member State, to do with the arrest of the ethnic Greek mayor of an Albanian municipality over vote buying⁵. Turkey also exerts some influence in the country, most notably economically and through religious/cultural diplomacy. Turkey financed the construction of the main mosque in the centre of the

² International Monetary Fund. 2000. The Rise and Fall of Albania's Pyramid Schemes. Finance and Development. March 2000. 37 (1). Available at: <https://www.imf.org/external/pubs/ft/fandd/2000/03/jarvis.htm>

³ Gjergji Vurmo. 2024. Tirana and Brussels start accession negotiations – Not accelerated, but hopefully transformative ones. BiEPAG Blog. 16.10.2024. Available at: <https://www.biepag.eu/blog/tirana-and-brussels-start-accession-negotiations-not-accelerated-but-hopefully-transformative-ones>

⁴ Ridvan Peshkopia. 2019. An ally to the people: EU membership conditionality and Albanians' attitudes toward EU membership, European Societies, DOI: 10.1080/14616696.2019.1660393

⁵ Gjergj Erebara. 2024. Albania Upholds Ethnic Greek Mayor-Elect's Vote-Buying Conviction. Balkan Insight. 05.06.2024. Available at: <https://balkaninsight.com/2024/06/25/albania-upholds-ethnic-greek-mayor-elects-vote-buying-conviction/>

capital, Tirana. The Namzga Mosque was recently inaugurated and opened to the public after Turkey succeeded in naming a Mufti of their own choosing to lead the mosque, with a foundation being established to manage the mosque under Turkish influence⁶. This was a strong showcasing of the influence that Turkey has in the matters of (perhaps not so) soft power.

Bosnia and Herzegovina

Bosnia and Herzegovina (BiH) has a complex political system and post-conflict society with an ethnic divide deeply embedded in its constitutional arrangement, which was negotiated as part of the Dayton Peace Accords in 1995. Bosniaks and Croats dominate in the Federation of Bosnia and Herzegovina (FBiH), and Republika Srpska (RS) has a majority Serbian population, while the Brčko District is multi-ethnic. The decision-making is complex and multilayered, especially at the central BiH level, with many veto players, which blocks or delays processes including its EU and NATO integration. BiH was granted EU candidate status in late 2022, only after Russia's aggression against Ukraine prompted EU leaders to push the process further.

The opening of accession negotiations was greenlit in March 2024 without the necessary reform priorities having been implemented. While there is consensus among political elites for seeking EU membership, BiH's NATO integration has been disputed. Bosnia and Herzegovina has had a Membership Action Plan with NATO since 2018, but Republika Srpska insists on military neutrality, as proclaimed in its Assembly's Resolution in 2017.

With no substantial results to offer regarding anti-corruption, improving living standards or addressing high emigration, political elites intentionally deepen the ethnic divide to remain in power and they seek allies in different 'brother nations' abroad. Through the divided media scene, they strongly influence public opinion in their respective communities, which reflects also onto the perception of foreign actors. Therefore, it is of essence to pay attention to differences in perceptions between entities and peoples in BiH.

Kosovo

Kosovo is considered a potential candidate country to the European Union, the only country in the Western Balkans with this status after the granting of candidate status for Bosnia and Herzegovina in late 2022. Kosovo's path towards membership has been hindered by its unrecognised statehood by five EU Member States and by the slow progression of the EU-mediated Kosovo-Serbia dialogue. Effectively, the whole process of accession for Kosovo became a pursuit of visa liberalisation rather than full membership⁷. Now that Kosovo has been granted visa liberalisation, effective since January 2024, the process of accession lacks any large milestones ahead, shy of candidate status.

Indeed, the relationship of the EU with Kosovo has been challenged further after the EU imposed sanctions on Kosovo as a result of unrest and a violent incident in the north of Kosovo, which is mostly populated by

⁶ [Inauguration of the Namazgja mosque, the Chief Mufti of Albania is absent, a Turkish imam is placed in charge](#)

⁷ Gashi, Krenar. 2019. "The Hyperreality of EU Enlargement: A Baudrillardian Critique of the European Union in Kosovo." In *Unravelling Liberal Interventionism*, edited by Gëzim Visoka and Vjosa Musliu, pages. London: Routledge.

the ethnic Serb community. This is largely construed as unfair by the local ethnic Albanian population and the political leaders.

Within this context, there seems to be a relationship of ‘hyperreality’. Namely, as Gashi assesses ‘EU–Kosovo relations as a “hyperreality” in which the EU simulates the power it does not really have, to enable the accession of a country it does not really want in’⁸. The perceptions of citizens of the EU and other external actors in this uncertain context may give more nuance to the findings in terms of identifying how the EU’s influence in the region is perceived.

Montenegro

Montenegro was granted EU candidate status in December 2010. The accession negotiations started in 2012. So far, a total of 33 negotiation chapters have been opened, of which three chapters are provisionally closed. The EU is the biggest foreign donor to Montenegro. The country is often viewed as a frontrunner in the EU accession negotiations among other Western Balkan countries. However, endemic corruption, clientelism, and decades of state capture by the previous government led by the Democratic Party of Socialists of Montenegro (DPS) and its leader, Milo Đukanović, had taken its toll, hindering the EU membership negotiations. Additionally, although it is less than it was before 2014 and Russia’s war in Ukraine, Russian influence is still present to a certain extent in Montenegro.

Russia opposes Montenegro’s Euro-Atlantic integration and uses mostly political interference, disinformation, historical ties to Serbia, and the role of the Serbian Orthodox Church as part of its strategy to distance Montenegro from the West⁹. In 2016, an attempted coup was orchestrated by Russian operatives and Serbian political parties in Montenegro, aimed at preventing Montenegro’s NATO accession. However, since 2017 when Montenegro became a NATO member, Russian influence has gradually shifted to attempting to distance Montenegro from EU membership. Nevertheless, over three quarters of Montenegrin citizens support the country’s EU membership, and there is consensus among political elites regarding the issue.

China’s engagement in Montenegro aligns with its broader ambition to provide alternative economic paths. In that sense, Montenegro’s relations with China are primarily based on economic cooperation, which includes in particular investments in infrastructure projects. The problem lies in the fact that these investments do not require any democratic reforms – Chinese investors do not insist on transparency and accountability. More recently, Turkish investors have also become an important factor in Montenegro. According to data from 2024, almost 10 000 companies registered in Montenegro are from Turkey¹⁰.

⁸ Ibid., p 63

⁹ International Republican Institute, 2024, “The Authoritarian Nexus – How Russia and China Undermine Democracy Worldwide,” <https://www.iri.org/resources/the-authoritarian-nexus-how-russia-and-china-undermine-democracy-worldwide/>

¹⁰ RTV, “10,000 Turkish companies are registered in Montenegro, more than a thousand are active,” 12.09.2024. https://www.rtv.rs/sr_lat/ekonomija/balkan/u-crnoj-gori-registrovano-10.000-turskih-kompanija-vise-od-hiljadu-je-aktivno_1568108.html

North Macedonia

North Macedonia was the first country in the Western Balkans to become a state with candidate status in 2005. However, from the beginning an issue stood in the path towards the advancement of the country towards EU as well as NATO accession – its name dispute with Greece. After repeated unsuccessful attempts to join NATO and advance on the EU path caused by Greek vetoes, North Macedonia finally changed its name in 2019 after a historic bilateral agreement with Greece¹¹, which also opened the way for the country to become a NATO member state in 2020. However, the EU path remained elusive, as despite the name change, neither North Macedonia nor Albania were able to continue their accession at the EU Summit of 2019.

Since then, North Macedonia has started the screening process. However, its progression on the path of accession is jeopardised because of a bilateral issue with Bulgaria, which introduced an additional framework condition for North Macedonia, including the necessity of changing its constitution to include Bulgarians as one of the constituent peoples listed in it. These constitutional changes have proved to be difficult, partly due to a disillusionment with the EU accession process. Namely, after changing the name of the country, it was expected, by both Macedonian policymakers and citizens, that there would be no further identity-related demands by external actors. Thus, the demands by the Bulgarian government and their insertion into the negotiating framework of North Macedonia have caused a considerable break in the process, including resulting in a change in government in North Macedonia, which returned the conservative and nationalist VMRO DPMNE to power. The latter is less likely to implement the constitutional changes required as they ran on a campaign which was against the constitutional changes in order to get elected¹².

Serbia

Serbia's EU accession process began in 2009, during the government led by the Democratic Party, when it formally applied for membership, and it was granted candidate status in 2012. The Serbian Progressive Party (SNS), composed of former high-ranking officials of the ultra-nationalist Serbian Radical Party, came to power in 2012, accepting the EU accession policy of the previous government. However, the SNS-led government did little to align Serbia with EU *acquis*, and the EU integration process slowed down in 2018 when Serbia lost its status as a democratic country, according to Freedom House¹³. This decline has happened since the SNS and its leader Aleksandar Vučić came to power. Instead of strengthening the rule of law and other criteria on the path to EU membership, they have consolidated their power through undemocratic means, undermining state institutions and increasingly relying on extra-institutional, corrupt, and often criminal

¹¹ Final Agreement for the Settlement of the Differences as Described in the United Nations Security Council Resolutions 817 (1993) and 845 (1993), The Termination of the Interim Accord of 1995, and the Establishment of a Strategic Partnership Between the Parties [Prespa Agreement] <https://www.mfa.gr/images/docs/eidikathemata/agreement.pdf> , 17.06.2018

¹² Sinisa Jakov Marusic. 2024. North Macedonia Govt's Dream of Rewriting Bulgaria Deal Meets Reality. 11.04.2024. Available at: <https://balkaninsight.com/2024/07/11/north-macedonia-govts-dream-of-rewriting-bulgaria-deal-meets-reality/>

¹³ Milica Vojinović, "Freedom haus: Srbija izgubila status slobodne države," *KRIK* (Beograd), 5. februar 2019, <https://www.krik.rs/freedom-haus-srbija-izgubila-status-slobodne-drzave/>.

mechanisms for managing society and the state. In foreign policy, the SNS has strengthened Serbia's relationship with Russia and China¹⁴.

These processes in domestic and foreign policy were followed with strong anti-Western propaganda. The core of these narratives is pro-Russian and pro-Putin messaging, portraying Putin as a great leader who stabilised Russia and strengthened it politically, economically, and militarily.

Pro-Chinese messages have also been added to the mix in recent years. The West is depicted as a global hegemony in decline, starting wars as it loses its power. These messages are disseminated through media outlets close to the president of the country, Aleksandar Vučić and the SNS. Pro-government television stations and newspapers not only spread pro-Russian propaganda, but their messaging was even more emotionally charged than that of the Russian media¹⁵. This reached extreme levels during the war in Ukraine, with absurd claims that Ukraine attacked Russia and that the West, especially the US and the UK, were responsible for the war, while Putin supposedly did everything to prevent it¹⁶. Consequently, citizens' support for EU membership has been declining, while anti-Western and nationalistic stances have been rising.

2.2. Exploration of state of the art (survey data)

2.2.1. Policy goals and priorities of citizens

To lay the groundwork for understanding the countries of the Western Balkans and the Eastern Neighbourhood in the context of the relationship to various external actors, it is important to understand the perceptions that citizens have of their own environment and their relationship to external processes and actors. The perceptions of citizens in the Western Balkans show a concern with both their domestic immediate future, as the economy forms one of the principal concerns, as well as concern and reflection on processes which relate to external actors, including EU accession and integration.

Economy and domestic politics

Economic development is a leading priority for citizens in the WB6, according to various polls including the BiEPAG poll, the IRI polls and the Balkan Barometer¹⁷, as elaborated below. According to data based on BiEPAG's poll, economic development is a leading priority for as many as 74 % of respondents in Serbia, while in Kosovo it marks a priority for 39 % of the respondents, which is still the highest percentage for the country. According to the same poll, EU membership is the second priority in most countries, except in Serbia, where

¹⁴ Predrag Petrovic, "Serbia: Government and the Scarecrow," in *Russia and the Far-Right: Insights From Ten European Countries*, ed. Kacper Rekawek, Barbara Molas, and Thomas Renard (The Hague: ICCT Press, 2024).

¹⁵ Vuk Velebit, "Proruski narativ u srpskim medijima (2) – Zašto su domaći mediji emotivniji od ruskih?," *Talas* (Beograd), May 22 2019, <https://talas.rs/2019/05/22/pro-ruski-narativ-drugi-deo/>.

¹⁶ Petrovic, "Serbia: Government and the Scarecrow."

¹⁷ Regional Cooperation Council. 2023. *Balkan Barometer 2023: Public Opinion*. p 11. Available at: <https://www.rcc.int/balkanbarometer/publications>

the second priority is the strengthening of democracy at 12 %¹⁸, while overall this indicator does not constitute a large concern. While all the countries of the Western Balkans score as Partly Free in the Freedom House Global Freedom score, BiH and Serbia have the lowest score at 51 and 57 respectively¹⁹. When it comes to the Democracy Score, all countries of the Western Balkans are categorised as transitional or hybrid regimes²⁰. In terms of economy, according to World Bank data, in 2024 the Western Balkans are expected to accelerate its growth moderately, but the environment remains uncertain²¹.

In Albania, the economy (cost of living crisis) and unemployment are the top concerns of citizens²² and seen as the priority issue. In North Macedonia, the economy (cost of living crisis) is the main problem at 31 %, whereas the second biggest problem is corruption (22 %). Both are also the top priority issues according to the IRI poll²³. Increasingly, the issue of brain drain is seen as a problem in the region. In Albania it is a concern shared by 41 % of the respondents, a 12 % increase compared to 2022. In North Macedonia it stands at 27 % as the second biggest problem, while in BiH it is the third biggest problem, with 29 % respondents having selected it²⁴. The World Bank report for Autumn 2024 also shines a light on the issue of migration, noting that 'close to one in four people from the Western Balkans resides abroad, making the region one of the largest origin of migrants relative to its population around the world'²⁵. Albania and BiH are the two countries with the highest number of emigrants²⁶, which explains why it is a topic of concern in both countries.

When asked if their countries are going in the right or wrong direction, the citizens of the Western Balkans have varying views. In Albania (52 %), North Macedonia (78 %), and Bosnia and Herzegovina (75 %) most respondents believe that their country is headed in the wrong direction. While in Montenegro (52 %), Kosovo (65 %), and Serbia (56 %), citizens had a more positive view, believing that their country was headed in the right direction. In general, 3 out of 4 BiH citizens think the country is headed in the wrong direction²⁷, which is an improvement compared to 2022, when that opinion was shared by 85 % of the population²⁸. In the meantime, the country's EU integration has gained traction, which could explain the difference. In North Macedonia, which holds the most negative view of the country's direction, in 2024 the difference is stark.

¹⁸ Balkans in Europe Policy Group. 2021. Public Opinion Poll in the Western Balkans on the EU Integration. BiEPAG. November 2021. p 13. Available at: <https://www.biepag.eu/news/public-opinion-poll-in-the-western-balkans-on-the-eu-integration/>

¹⁹ Freedom House, Global Freedom Scores, <https://freedomhouse.org/countries/freedom-world/scores>

²⁰ Freedom House, Democracy Scores, <https://freedomhouse.org/countries/nations-transit/scores>

²¹ World Bank. 2024. Retaining the Growth Momentum. Fall 2024. <https://documents1.worldbank.org/curated/en/099101424043012347/pdf/P5067421db658a06b1a82c1811f0301d818.pdf>

²² International Republican Institute. 2024. IRI 2024 Western Balkans Poll. Available at: <https://www.iri.org/news/iri-2024-western-balkans-poll/>

²³ IRI North Macedonia 2024.

²⁴ Regional Cooperation Council. 2023. Balkan Barometer 2023: Public Opinion. p 27. Available at: <https://www.rcc.int/balkanbarometer/publications>

²⁵ World Bank. 2024. Retaining the Growth Momentum. Fall 2024. p 17.

<https://documents1.worldbank.org/curated/en/099101424043012347/pdf/P5067421db658a06b1a82c1811f0301d818.pdf>

²⁶ Ibid.

²⁷ International Republican Institute. 2024. IRI 2024 Western Balkans Poll. Available at: <https://www.iri.org/news/iri-2024-western-balkans-poll/>

²⁸ (IRI 2022).

This goes some way to explaining the frustration of citizens in the country where a change in government in the 2024 national and presidential elections meant a right-wing government returning to power²⁹.

When it comes to domestic politics priorities, citizens of Montenegro recognise the economy as the top priority that the government should address. More specifically, costs of living and high prices are viewed by 39 % of citizens as a leading priority that should be addressed, while 17 % of citizens say that unemployment is the key issue. Among other priorities, Montenegrin citizens believe that corruption (12 %), small business opportunities/access to loans (5 %), and crime/public safety (5 %) are important issues that should be addressed by the government.

EU membership and external actors

While EU membership remains a strategic priority for the region, according to polls by BiEPAG and the RCC (Balkan Barometer), there is decreased support, particularly in some countries. The Balkan Barometer concludes that

'...overall support for the process (59%) has remained the same as in 2022 (60%). However, there are some sharp differences amongst the economies. Albania respondents are confirmed as the most supportive of EU membership, reaching 92% this year, and only 1% of respondents are against membership. Despite both Albania and North Macedonia starting accession negotiations in 2022, the latter shows a decrease by 6 points in terms of support'³⁰.

The BiEPAG poll, however, is more sobering in its conclusions, noting that 'full EU membership is not (anymore) the desired option for as many as 56% of respondents (with 10% choosing other and/or don't know). 18% prefer economic integration without EU membership - highlighting again the pragmatic approach focused on economic development of the country - and 28% propose at least a suspension of EU accession negotiations'³¹. Serbia again stands out, as only 28 % of respondents prefer full membership, while in Kosovo support is highest at 75 %. A key supporter of the countries' aspirations towards the EU is found in Germany, as it is the country that is most selected by the surveyed citizens in all countries except Serbia, where Hungary is seen as being the most supportive³².

The vast majority of 82 % of respondents from Albania to the IRI poll believe that the foreign policy direction of the country should be only pro-EU and the West. There is also an overarching positive outlook on the effect of NATO membership, whereby 64 % of respondents see the membership as positive, 27 % see it as somewhat positive, and only 5 % see it as somewhat negative or very negative³³.

²⁹ Jane Bojadzievski. 2024. North Macedonia's right-wing opposition scores victory in elections. 09.05.2024. Voice of America. <https://www.voanews.com/a/north-macedonia-right-wing-opposition-scores-victory-in-elections/7604923.html>

³⁰ Regional Cooperation Council. 2023. Balkan Barometer 2023: Public Opinion. p 12. Available at: <https://www.rcc.int/balkanbarometer/publications>

³¹ Balkans in Europe Policy Group. 2021. Public Opinion Poll in the Western Balkans on the EU Integration. BiEPAG. November 2021. p 14. Available at: <https://www.biepag.eu/news/public-opinion-poll-in-the-western-balkans-on-the-eu-integration/>

³² Ibid., 15

³³ International Republican Institute. 2024. IRI 2024 Western Balkans Poll. Available at: <https://www.iri.org/news/iri-2024-western-balkans-poll/>

Kosovo shares a similar pro-Western outlook, with 89 % of citizens who responded that the country's foreign policy needed to be 'only pro-European Union and the West'. Although there was a 4 % decline in support between May 2023 and March 2024, there is a steep incline from 66 % in September 2021³⁴, despite the sanctions on Kosovo imposed in 2023. Among Kosovo Serbs, however, there is a difference of opinion as 49 % believe that the course should be 'pro-Russian but keep up relations with the European Union and the West', and only 23 % would support the country joining the European Union, as opposed to 96 % of ethnic Albanians believing the same³⁵.

In Bosnia, approximately 40 % of citizens are exclusively pro-Western, while 34 % support various degrees of cooperation with both the West and Russia, and only 8 % are exclusively pro-Russian oriented (IRI 2024). Citizens are divided in their perception of the seriousness of EU intentions to offer membership to Western Balkan countries (44 % yes to 42 % no, IRI 2024). According to DEI in 2024, only half believe in the seriousness of EU intentions to offer membership to Western Balkan countries (44 % yes to 42 % no, IRI 2024). Support for EU membership is above 70 %, although there has been a slight decrease since 2021 and there is a clear and chronic difference between the two entities³⁶.

Citizens of Republika Srpska have been far less supportive: in 2024 only 48.3 % would vote yes at a referendum on EU membership while 38 % would vote against; and around 30 % believe the EU will dissolve³⁷. The main reasons for a positive opinion are four freedoms (Single Market), guarantee of peace and stability and the rule of law, while reasons against are the rise in living costs and taxes, loss of cultural diversity and excessive centralisation³⁸. As for NATO, half of BiH citizens support full membership (but less than 10 % of the Serb population), while a quarter rejects any cooperation³⁹.

Serbian citizens believe that the most important priorities of Serbia's foreign policy should be the protection of Serbs in the region (82 %), the fight for Kosovo (77 %), and strengthening cooperation with Russia (72 %) and China. Among the more important foreign policy priorities for citizens is attracting foreign investments (70 %), while strengthening cooperation with the EU (41 %) and the US (37 %) is at the bottom of the list of priorities⁴⁰. The majority of Serbian citizens believe that Serbia should not recognise Kosovo, even if this would lead to EU membership, significant economic aid, and the annexation of Republika Srpska⁴¹. The foreign policy priorities of Serbian citizens diverge from their domestic policy priorities, where economic improvement ranks first.

³⁴ International Republican Institute. 2024. National Survey of Kosovo. p.89. Available at: <https://www.iri.org/resources/national-survey-of-kosovo-may-2024/>

³⁵ International Republican Institute. 2024. National Survey of Kosovo. p.90. Available at: <https://www.iri.org/resources/national-survey-of-kosovo-may-2024/>

³⁶ DEI 2021-2024

³⁷ DEI 2024

³⁸ DEI 2024

³⁹ International Republican Institute. 2024. IRI 2024 Western Balkans Poll. Available at: <https://www.iri.org/news/iri-2024-western-balkans-poll/>

⁴⁰ Ibid.

⁴¹ "Bezbednosni barometar - stavovi građana Srbije / novembar 2022," (Beograd: Kantar, 2022). 55

In terms of strategic foreign policy orientation, most citizens believe that Serbia should align more or less with Russia. Thus, 27 % of citizens believe that Serbia's foreign policy should be pro-Russian while maintaining relations with the EU, while 12 % favour a complete shift towards Russia. Only 10 % of citizens support a full turn towards the EU and the West, while 14 % favour a pro-Western foreign policy course while preserving good relations with Russia. However, a significant number, two thirds of citizens, believe that Serbia should be equally oriented towards both the West and Russia. It is therefore not surprising that support for EU membership stands at only 40 %, 10 % less than four years ago. Additionally, the majority of citizens (54 %) believe that the EU is not serious about accepting new members from the Western Balkans⁴².

According to the opinion poll conducted in 2024, slightly more than 71 % of citizens perceive Montenegro's membership in the EU as a foreign policy priority⁴³. In addition, 79 % of citizens would vote for Montenegro to join the EU⁴⁴. There is a rising trend in citizens' support for the country's membership of the EU since 2020⁴⁵. The results from 2024 polls show that 36 % of Montenegrin citizens believe that the country should have only pro-European Union and West foreign policy course, while 22 % believe that Montenegro's foreign policy should prioritise West and Russia equally, and only 3 % say that the foreign policy course should be exclusively pro-Russian. However, slightly more citizens chose pro-Russian foreign policy but keeping up relations with the EU and the West (17 %), than pro-Western but keeping up relations with Russia (14 %)⁴⁶.

Montenegro's officials openly express their commitment to the EU accession process.

In June 2024, at the Intergovernmental Conference in Brussels, Montenegro received a positive report on the fulfilment of the interim benchmarks in Chapters 23 and 24, which in a way unfroze Montenegro's EU membership negotiations⁴⁷. The Prime Minister conveyed his wish that all negotiation chapters are closed by the end of 2026, so that Montenegro can become an EU Member State by 2028⁴⁸. This shows that EU accession is still officially recognised as a priority. Since 2021, there has been a steady increase in citizens' support to the Western foreign policy orientation⁴⁹. More than half of Montenegro's population believe that the EU is serious in its intention to offer membership to Western Balkan countries (59 %)⁵⁰.

⁴² "Western Balkans Regional Poll | February –March 2024 | Full-Deck," (May 14, Washington: International Republican Institute, October 17, 2024 2024). <https://www.iri.org/resources/western-balkans-regional-poll-february-march-2024-full/>.

⁴³ Centar za demokratiju i ljudska prava (Centre for democracy and human rights), "Political public opinion in Montenegro," March 2024, p. 34 <https://www.cedem.me/wp-content/uploads/2024/03/Prezentacija-MART-2024.-.pdf>

⁴⁴ International Republican Institute, 2024, IRI 2024 Western Balkans Poll, <https://www.iri.org/news/iri-2024-western-balkans-poll/>

⁴⁵ Centar za demokratiju i ljudska prava (Centre for democracy and human rights), "Political public opinion in Montenegro," March 2024, p. 29 <https://www.cedem.me/wp-content/uploads/2024/03/Prezentacija-MART-2024.-.pdf>

⁴⁶ International Republican Institute, 2024, IRI 2024 Western Balkans Poll, <https://www.iri.org/news/iri-2024-western-balkans-poll/>

⁴⁷ Radio Free Europe, „IBAR adopted, Montenegro in the new phase of EU negotiations," 26 June 2024, <https://www.slobodnaevropa.org/a/crna-gora-eu-konferencija/33010792.html>

⁴⁸ Vijesti, "Von der Leyen: Joining the EU by 2028 is a very ambitious goal, but achievable," 26 October 2024, <https://www.vijesti.me/vijesti/politika/730026/fon-der-lajen-ulazak-u-eu-do-2028-vrlo-ambiciozan-cilj-ali-ostvariv>

⁴⁹ Centar za demokratiju i ljudska prava (Centre for democracy and human rights), "Political public opinion in Montenegro," March 2024, p. 30 <https://www.cedem.me/wp-content/uploads/2024/03/Prezentacija-MART-2024.-.pdf>

⁵⁰ International Republican Institute. 2024. IRI 2024 Western Balkans Poll. Available at: <https://www.iri.org/news/iri-2024-western-balkans-poll/>

In North Macedonia in terms of foreign policy, a majority of 31 % believe that the foreign policy course of the country should be only pro-EU and the West, while 23 % believe that it should be the West and Russia equally. Only 4 % consider that the foreign policy should be only pro-Russian. However, the numbers change when the ethnic background of the respondents is factored in, as 51 % of ethnic Albanians believe that the foreign policy direction should be pro-EU and the West. In comparison, the same opinion is shared only by 23 % of ethnic Macedonians, who have slightly more support for the statement that the foreign policy course should be the West and Russia equally. Regarding support for the European Union, 68 % would vote to join the union if the vote were held at the time of responding. The lower percentage of support could be due to a low belief that this outcome is a potential possibility. Namely, only 34 % of the respondents believe that the EU is serious in its intention to offer membership, while a majority of 47 % believe this not to be the case⁵¹. This negative outlook on membership prospects is only shared by one other country, Serbia, where 54 % of respondents do not believe the EU is serious in its intention. Kosovo, on the other hand, is the most optimistic, with 62 % believing that the EU is serious in its intentions to offer membership⁵².

2.2.2. Economic interests

Generally, Western Balkans citizens 'acknowledge the importance of the EU as an economic partner'⁵³ in the region. The RCC conducted a Balkan Barometer poll with business owners and managers in the region, and found that among businesspeople, there is also a strong support for EU membership, at 71 % at the regional level, with Albania showing the highest interest at 96 %⁵⁴. Most of the surveyed businesses work mostly within their domestic markets, as 84 % admitted to only selling domestically⁵⁵. When asked whether they would or have invested abroad, generally 77 % businesses responded that they would not or have not invested abroad. In cases of investment, there is a preference to invest within the countries of the region, with the second preference being both Western Balkans and the EU⁵⁶. Within the region, there is generally a positive view of the Central European Free Trade Agreement (CEFTA) 2006 facilitating trade within the region, with 61 % of respondents believing that the agreement has helped their businesses, with the most positive views being shared in Kosovo (73 %), and North Macedonia (67 %)⁵⁷.

A majority of BiH citizens (60 %) perceive the EU to be the largest donor of the country, followed remotely by Turkey (14 %), Russia (8 %) and China (7 %)⁵⁸. Here, too, there is a clear difference between entities, where

⁵¹ International Republican Institute. 2024. IRI 2024 Western Balkans Poll. Available at: <https://www.iri.org/news/iri-2024-western-balkans-poll/>

⁵² International Republican Institute. 2024. IRI 2024 Western Balkans Poll. Available at: <https://www.iri.org/news/iri-2024-western-balkans-poll/>

⁵³ Geopolitically irrelevant in its 'inner courtyard?', BiEPAG, 2021

⁵⁴ Regional Cooperation Council. 2023. Balkan Barometer 2023: Business Poll. Available at : <https://www.rcc.int/balkanbarometer/publications>

⁵⁵ Ibid., pg. 81.

⁵⁶ Ibid. Pg. 73.

⁵⁷ Ibid. pg. 88

⁵⁸ DEI 2024, <https://www.dei.gov.ba/bs/istrazivanja-javnog-mnijenja>

RS citizens give more percentage (40 %) to the EU and less (22 %) to Russia, while FBiH citizens don't see Russia as donor at all. This largely corresponds with official data⁵⁹ showing that more than 90 % of Russian investment to BiH is in RS. Four out of five citizens are unaware of any Chinese investment in the country⁶⁰. The percentage was only slightly better in previous polls⁶¹. The ones who are aware of Chinese investments mostly refer to infrastructure construction and thermal power plants. The majority of citizens (60 %) believe that these investments give economic benefit to BiH, but most of them also perceive hidden political expectations and conditions⁶².

Kosovo citizens consider the United States, the European Union, Albania, Turkey and North Macedonia to be the most important economic partners, all scoring above 80 %. In Albania, the majority of respondents (84 %) were not aware of any major Chinese investments in the country, which also corresponds with data from North Macedonia (71 %), Kosovo (92 %) and Bosnia and Herzegovina (78 %)⁶³. It is different in Serbia where only 29 % of respondents are not aware of Chinese investments, while a majority of 66 % are aware. For many years, Serbian citizens did not see the EU as the main financial donor to Serbia; instead, they believed it was Russia and China. However, this changed two years ago, largely due to pressure from the EU on the Serbian government. Now, one third of Serbian citizens view the EU as Serbia's main donor. Nevertheless, Russia (26 %) and China (22 %) rank second and third, while the US and Germany are at the bottom, with 3 % each⁶⁴. In reality, the US is the second-largest donor in Serbia after the EU⁶⁵.

The latest public opinion polls show that nearly two thirds of Serbian citizens see the EU as Serbia's main economic partner (64 %),⁶⁶ which marks a significant decline compared to two years ago when nearly 80 % of respondents held this view⁶⁷. At the same time, the surveys note a continuous rise in China's standing, with support for China increasing from over 15 % in August 2022 to a record 25 % in August 2024. Only 11 % of respondents see Russia as Serbia's economic partner, while the US remains barely noticeable in this area⁶⁸. The research also revealed a gap between citizens' perceptions in this area and their preferences. Twice as many citizens (23 %) would prefer Russia to be Serbia's economic partner, while citizens' preferences for

⁵⁹ Republika Srpska ignoriše sankcije i otvoreno privlači ruske investicije. Available at: <https://www.slobodnaevropa.org/a/bih-rusija-republika-srpska-investicije-sankcije/32018762.html>

⁶⁰ International Republican Institute. 2024. IRI 2024 Western Balkans Poll. Available at: <https://www.iri.org/news/iri-2024-western-balkans-poll/>

⁶¹ IRI 2022, 2020

⁶² International Republican Institute. 2024. IRI 2024 Western Balkans Poll. Available at: <https://www.iri.org/news/iri-2024-western-balkans-poll/>

⁶³ Ibid.

⁶⁴ Ivana Petronijević, "Demostat: Građani prepoznaju EU kao najvećeg donatora i investitora, emotivno više vezani za Rusiju," *Demostat* (Beograd), 29. jun 2022, <https://demostat.rs/sr/vesti/ekskluziva/demostat-gradani-prepoznaju-eu-kao-najveceg-donatora-i-investitora-emotivno-vise-vezani-za-rusiju/1513>.

⁶⁵ "Uprkos predrasudama najveći finansijski donatori Srbije su EU i SAD," *Demostat* (Beograd), 9. septembar 2022, <https://demostat.rs/sr/vesti/ekskluziva/uprkos-predrasudama-najveci-finansijski-donatori-srbije-su-eu-i-sad/1565>.

⁶⁶ Dragoslav Rašeta and Dimitrije Milić, *Međunarodni položaj Srbije - mediji i stavovi građana* (Beograd: Novi treći put, 2024). <https://istrazivanja.rs/wp-content/uploads/2024/06/Međunarodni-položaj-Srbije-mediji-i-stavovi-gradani.pdf>.

⁶⁷ Dragoslav Rašeta and Dimitrije Milić, *Ekonomске posledice rata u Ukrajini i javno mnjenje u Srbiji* (Beograd: Novi treći put, 2022). 23.

⁶⁸ Rašeta and Milić, *Međunarodni položaj Srbije - mediji i stavovi građana*.

economic cooperation with the EU and China are about 10 % lower compared to how they currently perceive this cooperation⁶⁹.

The EU is the largest trade partner for Montenegro, followed by Serbia, whereas China, Turkey and Russia take more modest shares in Montenegro's trade. Based on the polls from 2022, slightly less than half of the population spontaneously responded that the EU is the biggest foreign donor to Montenegro, followed by the US (10 %), China (9 %) and Russia (9 %)⁷⁰. The most recent data show that the vast majority of citizens (76 %) are not aware of any significant Russian investments in Montenegro. When asked about motivation behind Russian investments, one third of the total population believes that Russian investment gives some economic benefits to the country, but it always carries certain political expectations and conditions. In addition, 23 % of citizens perceive Russian investment primarily as a way to influence and control Montenegro⁷¹. While more people are aware of major Chinese investment than Russian, 64 % are still unaware of any Chinese investment. Like the view on Russian investments, more than one third of citizens find Chinese investment economically beneficial to a certain extent, but that it always carries some political expectations and conditions⁷².

2.2.3. Cultural ties

There are notable cultural differences between Montenegrins and Chinese that reduce the impact of Chinese influence in the country. This is why China tries to establish cultural ties in Montenegro in a several ways. For example, the two countries have developed exchange programmes. The Montenegrin Chamber of Commerce has hosted several visits from Chinese business delegations to Montenegro, but exchanges also include local leaders, politicians, journalists, academics, and students. Since 2015, when a Confucius Institute was founded at the University of Montenegro, the Institute has launched 48 Chinese language classrooms across Montenegro, with around 400 students participating in classes. The University of Donja Gorica hosts guest lecturers from China and offers Masters programmes focused on China⁷³. In recent years, Turkish cultural influence has also been notable in Montenegro. However, there are no data on citizens' perceptions of these cultural ties with foreign countries.

Turkey has also invested in cultural ties in Albania, for instance by financing the largest mosque in Tirana, though some research⁷⁴ suggests that its economic influence is perceived to be stronger among the population than in the political or cultural dimensions. China is also involved in cultural diplomacy efforts in Albania, with a focus on influencing the country's future political and economic leadership as well as the

⁶⁹ Rašeta and Milić, *Ekonomске posledice rata u Ukrajini i javno mnjenje u Srbiji*.

⁷⁰ International Republican Institute. 2024. IRI 2024 Western Balkans Poll. Available at: <https://www.iri.org/news/iri-2024-western-balkans-poll/>

⁷¹ Ibid.

⁷² Ibid.

⁷³ International Republican Institute, 2024, "The Authoritarian Nexus – How Russia and China Undermine Democracy Worldwide," <https://www.iri.org/resources/the-authoritarian-nexus-how-russia-and-china-undermine-democracy-worldwide/>

⁷⁴ Erlis Hoxha. 2018. Turkey vs. China: Assessing Perceptions of the Economic, Political and Cultural Influence in Albania. European Journal of Social Sciences. 1 (3). Available at: https://brucol.be/files/articles/ejss_v1_i3_18/Hoxha.pdf

general public through educational exchanges and the distribution of media that paints a positive picture of China. For instance, between August 2021 and August 2022 the Radio broadcaster 'China International' published more than 5 200 articles in Albanian, a large number of which promote China as an economic partner, thus aiming to increase trust in China by Albanian businesses⁷⁵.

Similarly, China offered Albanian television companies free airings of Chinese TV productions that paint positive pictures of China. These efforts seem to pay off as in a 2024 poll, only 1 % of Albanians suggested that China was a threat to Albania, although at the same time only 2 % saw it as an ally⁷⁶. While pro-Chinese positions as such are not necessarily threatening, they become a vulnerability once China can use them as political and economic leverage. However, this would not be easy to achieve considering Albania's history with China during its communist regime.

⁷⁵ Blerjana Bino and Likmeta, Besar. 2023. Media Analysis: China's Public Diplomacy in Albania. BIRN. Available at: <https://birn.eu.com/wp-content/uploads/2023/07/Chinas-public-diplomacy-in-Albania-.pdf>

⁷⁶ International Republican Institute. 2024. IRI 2024 Western Balkans Poll. Available at: <https://www.iri.org/news/iri-2024-western-balkans-poll/>

2.2.4. Perception of the relationship of external actors with one another

Most important allies

In the Western Balkans, external actors of relevance are countries within the region, as well as the US, China, bordering EU countries, Germany, and Turkey. The US is seen as the most important ally with an overwhelming majority in Kosovo (80 %) considering the role that the US has taken since the war and the support for the country's independence. In addition, the US has a high favourability among citizens in Kosovo, reaching up to 96 % (91 % highly favourable and 5 % somewhat favourable)⁷⁷. The lowest count over the past five years was in 2020, at 94 % (88 % highly favourable and 6 % somewhat favourable), which shows that support since then has remained consistent despite changes in US administration⁷⁸. In Albania, the US is also considered the most important ally by 56 % of the respondents of the IRI poll in 2024. Other countries that see the US as an important ally are Bosnia and Herzegovina (12 %), North Macedonia (17 %), and Montenegro (20 %)⁷⁹.

Turkey is seen as the second most important ally in the Western Balkans. Turkey enjoys very favourable views in BiH, as 22 % citizens believe it is the country's most important ally. This places the country as the top most important ally, and its president Recep Tayyip Erdogan is by far the most favourable leader among regional and global powers⁸⁰. Several polls over the years confirm this perception of Turkey and its leader. It is also seen favourably in North Macedonia, as the third most important ally with 12 %, as well as in Albania with 8 %. In Kosovo it has 3 % despite the involvement of Turkey in the country's cultural and political environment⁸¹.

Russia is seen as the most important ally in Serbia by 46 % of the respondents or most respondents who answered. The second most important ally is China with 14 %, although China does not figure as an ally for any of the other countries. Russia is also seen as an important ally in Bosnia and Herzegovina (13 %), Montenegro (9 %), and North Macedonia (8 %)⁸². Lastly, for North Macedonia (34 %) and Montenegro (32 %), the most important ally is within the region: Serbia.

⁷⁷ International Republican Institute. 2024. National Survey of Kosovo. Available at: <https://www.iri.org/resources/national-survey-of-kosovo-may-2024/>

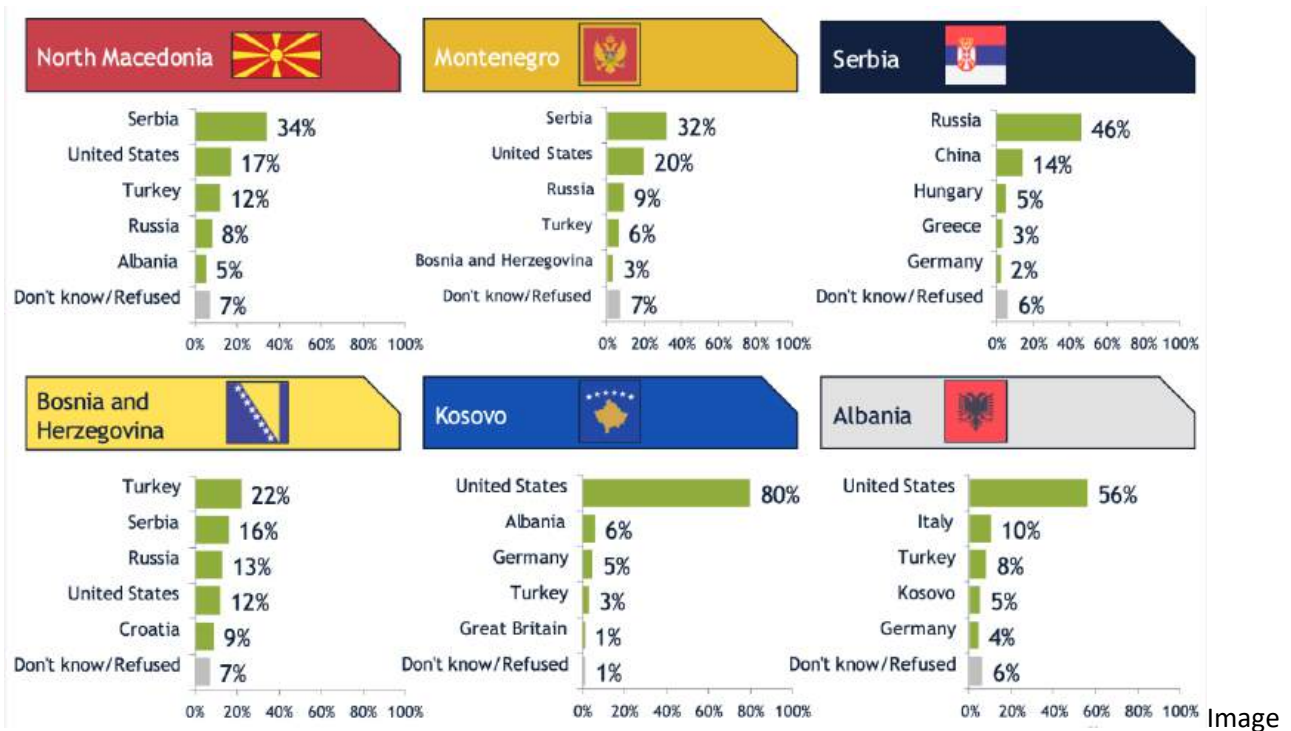
⁷⁸ IRI, 2020. Western Balkans Regional Poll. https://www.iri.org/wp-content/uploads/2020/06/final_wb_poll_for_publishing_6.9.2020.pdf

⁷⁹ IRI Western Balkan Poll 2024

⁸⁰ (IRI 2024)

⁸¹ Ibid.

⁸² Ibid.



Source: IRI Western Balkans Poll 2024

Friends and foes

When it comes to the neighbouring countries, the picture becomes more nuanced. While data shows that there is a positive attitude ‘[m]ore than three quarters of respondents (76 %) have a positive attitude towards the impact that regional cooperation can have on their political, economic and security situation’⁸³ the picture becomes blurry when considering the perceptions of the citizens towards different countries. This blurriness is also reflected in terms of other external actors such as Russia, China and the US.

In Bosnia and Herzegovina, Serbia, Russia and the US are perceived as both the greatest threats and allies, with slightly prevailing negative votes. Only 1 % spontaneously mention China, although when explicitly asked, most have a favourable opinion about this country⁸⁴. Russia has scored the most highly unfavourable views (39 %), but even so, 93 % of the Serbian population perceives Russia favourably. Data show that whom BiH citizens perceive as friend or foe correlates heavily with their ethnicity. For Serbs, Serbia and Russia are the two top allies by far, for Croats it is dominantly Croatia, while Bosniaks perceive them otherwise and rather favour Turkey and the US⁸⁵. Serbs have a more favourable opinion on China (79 %) than Bosniaks (36 %) and Croats (55 %) do.

⁸³ Regional Cooperation Council. 2023. Balkan Barometer 2023: Public Opinion. p 12. Available at: <https://www.rcc.int/balkanbarometer/publications>

⁸⁴ International Republican Institute. 2024. National Survey of Kosovo. Available at: <https://www.iri.org/resources/national-survey-of-kosovo-may-2024/>

⁸⁵ Ibid.

Half of BiH citizens consider the Russian armed actions in Ukraine as completely unjustified, but the society is polarised regarding the question of whom to support – 34 % support Ukraine, 26 % Russia and 36 % neither of them⁸⁶. Again, there is clear demarcation along internal ethnic and entity lines on the perception of who is most responsible for the conflict. Every second Bosniak and every third Croat in BiH blame Russia, but only 5 % of Serbs agrees with them. On the contrary, most Serbs blame the other side – the West (44 %) or Ukraine (21 %). As for NATO's role in the world, opinions of BiH citizens are quite divided and even more so than in 2020 and 2022 (before the Russian invasion of Ukraine) – 57 % positive and 38 % negative. When asked in 2021 who had spread fake news, BiH citizens evoked first China (18 %), followed by the US and the EU with its Member States, while plurality made no difference between them and blamed all⁸⁷. This was a specific context during the Covid-19 pandemic.

Serbian citizens hold the most favourable opinions of Russia (88 %) and China (88 %), followed by Turkey (56 %) and Germany (37 %), while only a quarter of respondents have a positive opinion of the US. Regarding neighbouring countries, citizens have a good opinion of North Macedonia, Bosnia and Herzegovina, and Montenegro, while the worst opinions are reserved for Croatia and Kosovo, with only a quarter of respondents viewing them positively. Albania fares the worst, with only 10 % of citizens having a favourable opinion of the country. These views extend to opinions about world leaders, with citizens having the most favourable opinions of Vladimir Putin (80 %), the President of Russia, Xi Jinping (73 %), the President of China, and Recep Tayyip Erdoğan (41 %), the President of Turkey, while only 12 % of citizens have a favourable opinion of Joe Biden, the President of the US⁸⁸.

The positive and negative perceptions of countries among Serbian citizens are mirrored in their perception of enemies. Citizens have identified the US and Albania as the greatest threats to Serbia, while Russia and China are viewed as the least threatening⁸⁹. In other public opinion surveys where NATO is included as a response option, the alliance ranks first as Serbia's enemy (65 %), followed by the USA (46 %)⁹⁰. These findings regarding NATO are unsurprising, given that a vast majority of citizens (84 %) view NATO's role in Serbia as negative⁹¹. Albanians, on the other hand, also view Serbia, along with Russia (32 %) and Greece (9 %) as threats⁹². Russia and Serbia are both also seen highly unfavourably by the respondents in Albania, with 75 % and 73 % respectively.

⁸⁶ Ibid.

⁸⁷ Balkans in Europe Policy Group. 2021. Public Opinion Poll in the Western Balkans on the EU Integration. BiEPAG. November 2021. Available at: <https://www.biepag.eu/news/public-opinion-poll-in-the-western-balkans-on-the-eu-integration/>

⁸⁸ International Republic Institute. "Western Balkans Regional Poll | February –March 2024 | Full-Deck."

⁸⁹ Šterić, Vuksanović, and Bjeloš, *Public Perception of Serbian Foreign Policy in the midst of the War in Ukraine*.

⁹⁰ International Republican Institute. 2024. IRI 2024 Western Balkans Poll. Available at: <https://www.iri.org/news/iri-2024-western-balkans-poll/>

⁹¹ Ibid.

⁹² Ibid.

Although Serbian citizens hold negative views of Albania, surveys from 2022⁹³ and 2024⁹⁴ show that about two thirds of them support the Open Balkan initiative, which aims to deepen cooperation among Western Balkan states, with Albania, North Macedonia, and Serbia as its current members. Furthermore, three quarters of respondents support free movement, the exchange of information, and a common market for goods and labour in the Western Balkans, while only 16 % are against it. Citizens mainly blame both domestic and foreign politicians, past conflicts, nationalism, and ethnic hatred for the poor cooperation among the region's countries⁹⁵.

The perception of external actors in Kosovo is favourable to Western countries and actors, including Germany (98 %⁹⁶), the US (98 %) and the EU (94 %) and unfavourable to Russia (94 %) and China (90 %)⁹⁷. The view of countries in the wider region varies, with Albania and Turkey enjoying high favourability with 95 %, while neighbouring Serbia being viewed as unfavourable (93 %). In the case of Kosovo there is a large divergence between the ethnic Albanian and the ethnic Serb respondents, particularly in support for Albania, the EU, Turkey and Serbia. For instance, when it comes to the US, which enjoys the highest favourability among the ethnic Albanian respondents in Kosovo at 99 % (highly favourable and somewhat favourable), it only enjoys 38 % (highly favourable and somewhat favourable) among the ethnic Serbs⁹⁸. The EU has a favourability of 87 % among ethnic Albanians, and 42 % among ethnic Serbs. This data has remained consistent throughout the years, as also shown by an NDI poll which offers comparative data between March 2019 to April 2021⁹⁹.

Albania's most important allies are considered to be the US (56 %), Italy (10 %), Turkey (8 %) and Kosovo (5 %). These are also some of the countries which are seen highly favourably, namely the US (71 %), Kosovo (69 %), Germany (63 %), and Turkey (45 %)¹⁰⁰. The most favourable leader in Albania is Recep Tayyip Erdogan (71 %), the president of Turkey, followed by Joe Biden (64 %). In Kosovo the rating is reversed, with Joe Biden, president of the US, enjoying 85 % favourability and Erdogan having 82 %. These data are interesting because Joe Biden and Erdogan have very different governing styles, with Erdogan showing increasingly authoritarian

⁹³ Gorana Pebić, Ivana Ranković, and Luka Šterić, *War Echoes Intensify Fears – Views of Serbian Citizens on Relations in the Region* (Belgrade: Belgrade Centre for Security Policy, 2023). <https://bezbednost.org/en/publication/war-echoes-intensify-fears-views-of-serbian-citizens-on-relations-in-the-region-2/>

⁹⁴ International Republican Institute. 2024. IRI 2024 Western Balkans Poll. Available at: <https://www.iri.org/news/iri-2024-western-balkans-poll/>

⁹⁵ Pebić, Ranković, and Šterić, *War Echoes Intensify Fears – Views of Serbian Citizens on Relations in the Region*.

⁹⁶ Favourability is taken as both responses 'highly favorable' and 'somewhat unfavourable' and unfavourability as a combination of the responses of 'somewhat unfavourable' and 'highly unfavourable' in the IRI Survey.

⁹⁷ International Republican Institute. 2024. National Survey of Kosovo. P. 80. Available at: <https://www.iri.org/resources/national-survey-of-kosovo-may-2024/>

⁹⁸ International Republican Institute. 2024. National Survey of Kosovo. Available at: <https://www.iri.org/resources/national-survey-of-kosovo-may-2024/>

⁹⁹ National Democratic Institute. 2021. Kosovo Public Opinion Survey. April 2021. Available at: <https://www.ndi.org/sites/default/files/NDI%20Kosovo%20Public%20Opinion%20Poll%20-%20April%202021.pdf>

¹⁰⁰ International Republican Institute. 2024. IRI 2024 Western Balkans Poll. Available at: <https://www.iri.org/news/iri-2024-western-balkans-poll/>

tendencies more in line with Putin, who in both countries has a very low favourability, 10 % in Albania and 8 % in Kosovo¹⁰¹.

Among Montenegrin citizens, Serbia enjoys the most favourable opinion (39 %), while Russia takes second place (24 %). This is also reflected in the fact that half of the population said that they have a high or somewhat favourable opinion of Vladimir Putin. The only world or regional leader that is perceived more positively than Putin is Recep Tayyip Erdogan, with 56 % of responses in his favour. Along with Serbia (32 %), citizens recognise the US (20 %) as the most important ally for Montenegro. Russia is third on that list, but with only 9 % of citizens perceiving Russia as an important ally, followed by Turkey and BiH¹⁰².

Compared to results in 2022, when Germany was perceived as the most favourable country in Montenegro, with 31 % of responses supporting this, it seems that Serbia's opinion among Montenegrin citizens has improved. Perception on Russia practically remained the same in 2022 and 2024, although the poll in 2022 was conducted before the beginning of Russian aggression against Ukraine in February 2022¹⁰³. The fact that the war didn't significantly change Montenegrin citizens' opinions about Russia is supplemented by results from 2024 showing that 27 % of citizens believe that Russia is most responsible for the military conflict between Russia and Ukraine, while 26 % believe it is the West that is responsible. On the other hand, 44 % responded that Russia's actions in Ukraine are completely unjustified¹⁰⁴.

In North Macedonia, the countries with the highest favourability are Turkey (77 % highly favourable and somewhat favourable) and Germany (73 % highly favourable and somewhat favourable). The least favourable countries are Albania (42 % highly favourable and somewhat favourable) and Kosovo (35 % highly favourable and somewhat favourable) which is an interesting finding considering they are two of the closest neighbouring states). The data for North Macedonia change when the answers of ethnic Albanians are considered more closely, as in this case Albania (80 %) and Kosovo (77 %) are second to Germany (81 %) in terms of favourability. When only the answers of ethnic Macedonians are factored in, the country with the highest favourability is Serbia (88 %), whereas non-regional countries only come after the sixth place, Germany with 71 %.

Of the regional countries, Montenegro seems to enjoy the highest favourability at 72 % (highly favourable and somewhat favourable). In Montenegro, the two leaders with the highest favourability are Erdogan (66 %) and Putin (49 %), which dismantles ideas of a closeness to Turkey on religious grounds, as the high score for Erdogan would not have been possible without ethnic Macedonian respondents also rating him highly. However, in the case of North Macedonia, the popularity of both Erdogan and Putin has somewhat decreased. There is only a slight increase in the perception of Xi Jinping who in 2022 had 32 % favourability

¹⁰¹ Ibid.

¹⁰² International Republican Institute. 2024. IRI 2024 Western Balkans Poll. Available at: <https://www.iri.org/news/iri-2024-western-balkans-poll/>

¹⁰³ Ibid.

¹⁰⁴ Ibid.

while in 2024 this favourability increased to 35 %. This could also be because of his presence in regional media after his visit to Belgrade in May 2024¹⁰⁵.

Security

As post-conflict societies with ethnic cleavages, Kosovo and BiH are usually considered as two potential crisis hotspots in the Western Balkans, especially after the Russian invasion of Ukraine stirred geopolitical turmoil across the continent. The RCC Balkan Barometer notes that ‘Only 31% of respondents in the region appreciate their government’s measure to tackle security issues, while 38% are not satisfied’¹⁰⁶. The Securimeter survey carried by the RCC noted in 2023 that there was growing dissatisfaction with security in the region, judging from the time the survey started measuring in 2021, which can be attributed to the post-pandemic world and the Russian war of aggression in Ukraine¹⁰⁷. According to the Securimeter findings, ‘only one in two respondents in the region feel the Western Balkans is a secure place to live in’¹⁰⁸. The leading cause for the countries of the region in what impacts the feeling of security is ‘crime, organized crime, drugs and human trafficking, violence and vandalism’¹⁰⁹.

For four of the Western Balkan countries, the most important threat that they perceive is within the region: North Macedonia (Bulgaria), Bosnia and Herzegovina (Serbia), Kosovo (Serbia) and Albania (Serbia). For Montenegro and Serbia, the most important threat is the US. Russia is the second most important threat for most of the countries of the Western Balkans, as shown below¹¹⁰. Interestingly, China only figures as a threat in Kosovo, but in the data from 2022 and 2020, China was considered a greater threat in Kosovo. However, this might also be owing to a change in methodology, as the data with the 2024 poll are spontaneous responses, whereas in the earlier polls there was a determined list offered to respondents (US, Russia, Turkey, China and Germany)¹¹¹.

¹⁰⁵ Serbia to Xi Jinping: No one reveres you like we do. Available at: <https://www.politico.eu/article/xi-jinping-belgrade-serbia-china-aleksandar-vucic-investments/>

¹⁰⁶ Regional Cooperation Council. 2023. Balkan Barometer 2023: Public Opinion. p 11. Available at: <https://www.rcc.int/balkanbarometer/publications>

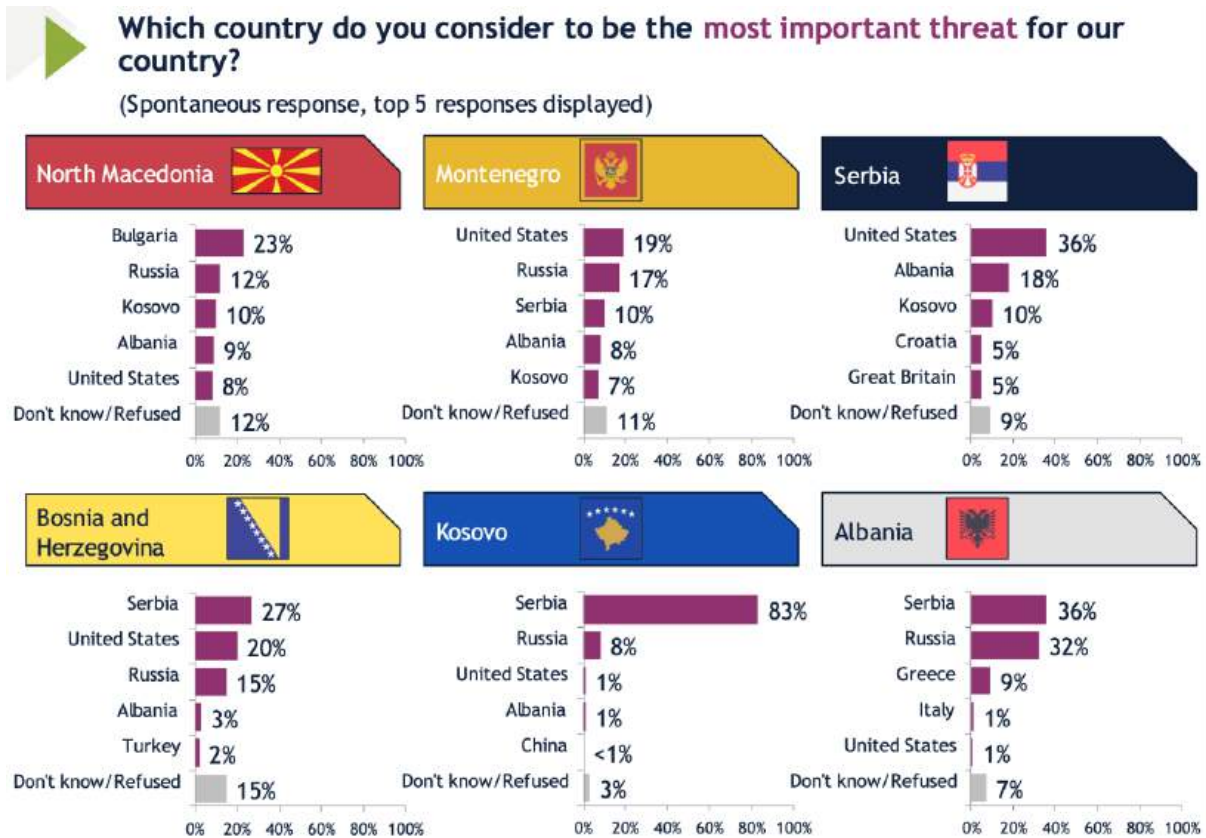
¹⁰⁷ Regional Cooperation Council. 2023. Western Balkans Securimeter 2023, p 19, available at: <https://www.rcc.int/securimeter/publications>

¹⁰⁸ Regional Cooperation Council. 2023. Western Balkans Securimeter 2023, available at: <https://www.rcc.int/securimeter/publications>

¹⁰⁹ Ibid.

¹¹⁰ International Republican Institute. 2024. IRI 2024 Western Balkans Poll. Available at: <https://www.iri.org/news/iri-2024-western-balkans-poll/>

¹¹¹ Ibid.



Source: IRI Poll Western Balkans 2024

NATO and external guarantors to security

Support for NATO membership for North Macedonia was at 68 %¹¹² in 2021, right after Albania (89.1 %), both members of the organisation. In North Macedonia people think that the EU and other Member States can be greater providers of security than NATO, whereas Russia was seen as third security provider, before US and its neighbours¹¹³. Conversely, in Kosovo the US (considered as an individual actor although a part of NATO) was seen as the main provider of security (77.5 %). Similarly in Albania the US and other EU Member States came before NATO¹¹⁴. The other countries of the Western Balkans also look westward in terms of the external partners they would rely on as security providers.

The only exception is Serbia, which has a preference towards Russia (59.4 %) and China (40.5 %) as its security providers. Regarding military cooperation, a large majority of citizens believe that Serbia should remain militarily neutral (70 %), while one quarter are against this and believe that Serbia should strengthen military cooperation with Russia and China. Only 5 % of respondents support NATO membership. Moreover, two thirds of citizens are not only against Serbia joining NATO but also oppose any form of cooperation with the

¹¹² Balkans in Europe Policy Group. 2021. Public Opinion Poll in the Western Balkans on the EU Integration. BiEPAG. November 2021. Available at: <https://www.biepag.eu/news/public-opinion-poll-in-the-western-balkans-on-the-eu-integration/>

¹¹³ Ibid., 9

¹¹⁴ Ibid., 10

alliance. One quarter of citizens support cooperation with NATO provided that Serbia maintains its military neutrality¹¹⁵. Recent surveys this year show similar results, with citizens firmly against NATO membership and, at best, in favour of cooperation and communication with the alliance¹¹⁶.

Kosovo (a non-member) and Albania (a member) have the most positive perception of NATO, while Serbia has the most negative perception. Interestingly, though a member, Montenegro has the second most negative perception, although the difference with Serbia is stark, and this outlook improved towards positive in 2024, with 55 % finding the alliance's role in the world as mostly positive or somewhat positive¹¹⁷, which could be explained with the increased sense of need for security and NATO post-Ukraine war. Juxtaposed with who these two countries view as the greatest threat (the US) it also may follow that is why they do not perceive NATO as having a positive role.

Security satisfaction in the region

In Albania the majority of citizens (52 %) consider the security situation to be either very satisfactory or somewhat satisfactory. It is the only country in the region which holds the majority view that nationalism is not a problem in the country, at 63 %. Bosnia and Herzegovina also had a positive outlook on security in 2024, as a majority of respondents assessed the security situation in the country as satisfactory (57 %) and the escalation of armed conflict as unlikely (70 %)¹¹⁸ according to the IRI poll, which has different findings from the RCC poll of 2023, which holds that respondents from Bosnia and Herzegovina are least satisfied¹¹⁹.

Factors that are considered as possible contributors to conflict escalation in Bosnia and Herzegovina are general political and economic instability, inter-ethnic tensions, activities of neighbouring countries and interests of political leaders. However, citizens believe that their peers would refuse to engage in another war (59 %) and that the international community would not allow such developments (48 %). BiH nationals do perceive nationalism as a problem (87 %) and they blame the political elite for stirring inter-ethnic tensions within the country, but they mostly regard those tensions as moderate or small (69 %)¹²⁰.

Half of the population in Montenegro is satisfied with the security situation in their country. This could be explained by more than half of respondents in 2024 believing that NATO membership has been positive for Montenegro. However, 36 % of citizens believe that the likelihood of an armed conflict in the near future is very unlikely, which is a significant drop compared to 54 % in 2022. The main issues that respondents recognised as potential reasons for an outbreak of armed conflict include the interest of political leaders (28 %), other ethnic groups that are causing tensions (26 %), general political and economic instability (24 %) and neighbouring countries that are destabilising Montenegro (24 %). Among other responses, unresolved

¹¹⁵ Luka Šterić, Vuk Vuksanović, and Maja Bjeloš, Public Perception of Serbian Foreign Policy in the midst of the War in Ukraine (Belgrade: BCSP&KCSS, 2022). https://qkss.org/images/uploads/files/WBSB-2022_Serbia-Report-1_Dec-2022_%281%29.pdf.

¹¹⁶ International Republican Institute. 2024. IRI 2024 Western Balkans Poll. Available at: <https://www.iri.org/news/iri-2024-western-balkans-poll/>

¹¹⁷ Ibid.

¹¹⁸ Ibid.

¹¹⁹ Regional Cooperation Council. 2023. Balkan Barometer 2023: Public Opinion. p 11. Available at: <https://www.rcc.int/balkanbarometer/publications>

¹²⁰ Ibid.

territorial disputes, a spillover effect from the Russian aggression in Ukraine and NATO aggression are also viewed as potential reasons for an armed conflict¹²¹.

Two thirds of citizens are satisfied with the security situation in Serbia. The majority of respondents (56 %) also believe that internal and external security threats will not lead to armed conflict in the near or foreseeable future. As potential reasons for the outbreak of armed conflicts, respondents cited unresolved territorial disputes (45 %), tensions and provocations caused by other ethnic groups (27 %), attempts by neighbouring states to destabilise the situation (25 %), poor overall economic and political conditions (19 %), the interests of political elites (12 %), NATO aggression (8 %), and the possibility of conflict spreading as a consequence of Russia's aggression in Ukraine (8 %)¹²².

The findings of the public opinion survey on factors threatening national and personal security are particularly interesting. Citizens consider the economic and energy crises, inflation, and organised crime and drug trafficking to be the biggest threats to national security. However, citizens believe that ethnic minorities seeking to secede (41 %), globalist elites (36 %), and migrants (35 %) pose the greatest threat to themselves and their families, while extreme-right groups (24 %) and hooligans (22 %) are at the bottom of the list¹²³.

In 2024, Kosovo had the highest satisfaction with the security situation of the country, according to the IRI poll, with 25 % answering that the security situation is very satisfactory and 50 % somewhat satisfactory. This is an unexpected finding considering the Banjska attack in the north of Kosovo in late 2023¹²⁴. This created a precarious security environment but it could speak to the satisfaction citizens might have had with the resolution to the attack and that it did not lead to a wider conflict. However, the assessment of security changes completely when looking at the Kosovo Serb population, who see the security situation as very unsatisfactory (67 %) or somewhat unsatisfactory (21 %). This difference is quite concerning because it shows that the part of the population which is most affected by the situation in the north of the country feels unsafe. Among the Kosovo Serbs, 61 % noted that armed conflict would be likely to happen because of unresolved territorial disputes, while 64 % of Kosovo Albanians believe that armed conflict would be likely to happen because of neighbouring countries destabilising their country, and 47 % choosing other ethnic groups as the cause of tensions.

There is also a difference between the communities as to why they think conflict would be unlikely, with 90 % of Kosovo Albanians opining that the international community would not allow it, which is shared by 56 % of Kosovo Serbs, while the majority of them (64 %) believe that citizens would refuse to fight a new war. The reliance on the international community attests to the unique post-war set up of peacebuilding and keeping in Kosovo¹²⁵.

¹²¹ International Republican Institute. 2024. IRI 2024 Western Balkans Poll. Available at: <https://www.iri.org/news/iri-2024-western-balkans-poll/>

¹²² Ibid.

¹²³ Petrovic, "Serbia: Government and the Scarecrow."

¹²⁴ <https://www.rferl.org/a/northern-kosovo-banjska-attack-police/33130349.html>

¹²⁵ International Republican Institute. 2024. IRI 2024 Western Balkans Poll. Available at: <https://www.iri.org/news/iri-2024-western-balkans-poll/>

Nearly half do not see nationalism as a problem in the country (48 %). However, 45 % do, which in Kosovo is mostly attributed to other ethnic groups, the only country in the region to have this result. Most other countries attribute tensions to political parties (BiH, Montenegro and North Macedonia) while in Serbia, tensions are attributed mostly to political parties (38 %) and to foreign powers (18 %). Data from the Securimeter show that in Kosovo the phenomenon most seen as impacting the feeling of security is the possibility of armed conflict, the only country where this is the leading cause¹²⁶.

In North Macedonia half of the respondents are very or somewhat satisfied with the security situation in the country¹²⁷. More than half of them (63 %) believe that nationalism is a problem in the country. However, any tensions which arise in the country are seen mostly as the result of political parties/leaders' engagement (61 %)¹²⁸. However, in the Securimeter data, there are added elements which show that nationalism and insecurity regarding minority groups is a more acute issue in the perception of citizens, as respondents consistently considered 'minorities as threats across nearly all areas – insecurity, criminality, cultural distortion, unemployment, welfare exploitation and preferential treatment'¹²⁹, which attests to a general lack of social cohesion internally¹³⁰.

Social issues

A public opinion survey by BCBP showed that a significant number of Serbian citizens hold very conservative and nationalist views. For example, 23 % of citizens completely or mostly support the views and activities of Serbian far-right organisations, while nearly a third of respondents (28 %) support some of the extreme right-wing ideas and organisations. Additionally, almost half of the respondents (49 %) support the 'Processions for the Salvation of Serbia', right-wing protests that initially started as a reaction to the organisation of EuroPride in Serbia, but later expanded their agenda to include opposition to Kosovo's independence, imposing sanctions on Russia, etc. Citizens believe that it is justified to resort to violent methods when it comes to protecting their personal and family security (61 %), as well as when protecting their people (57 %) and traditional values (42 %)¹³¹. These results represent a significant increase in the willingness to resort to violence compared to a public opinion survey from 2012¹³². When asked to evaluate certain groups or institutions based on how threatened they personally feel by them, minorities seeking to secede from Serbia (53 %), globalist elites (52 %), and migrants (47 %) were identified as the top three groups¹³³.

¹²⁶ Regional Cooperation Council. 2023. Western Balkans Securimeter 2023, available at: <https://www.rcc.int/securimeter/publications>

¹²⁷ International Republican Institute. 2024. IRI 2024 Western Balkans Poll. Available at: <https://www.iri.org/news/iri-2024-western-balkans-poll/>

¹²⁸ Ibid.

¹²⁹ Regional Cooperation Council. 2023. Western Balkans Securimeter 2023, available at: <https://www.rcc.int/securimeter/publications>

¹³⁰ Petrovic, "Serbia: Government and the Scarecrow."

¹³¹ Petrovic, "Serbia: Government and the Scarecrow."

¹³² Katarina Đokić, Građani Srbije o nasilju (Beograd: BCBP, 2012). <https://bezbednost.org/en/event/conference-in-the-media-centre-citizens-of-serbia-on-violence/>

¹³³ Petrovic, "Serbia: Government and the Scarecrow."

These ultraconservative and nationalist views are also reflected in citizens' attitudes towards democracy. The BCSP survey has shown that only 40 % of respondents think that democracy is the form of government that suits Serbia best, while one third are for democracy in principle but believe that the current state of affairs in the country requires a 'firm hand'. The rest of the citizens are indifferent to the form of government or are openly for autocracy¹³⁴.

2.3. Threats and opportunities

2.3.1. Threats

Lack of internal social cohesion

In the Western Balkans, due to the ethnic cleavages that exist within the countries and the bilateral issues that countries of the region have between themselves, there are important distinctions which emanate from the data that can pose threats. For instance, in Bosnia and Herzegovina and Kosovo there are considerable differences between different ethnic groups as to the priorities they have and the direction they want the country to take, marking a lack of cohesion which itself is a threat in multi-ethnic societies. In North Macedonia ethnic minorities are considered a threat across diverse issues. The data thus show a lack of cohesion and a gnawing sense of insecurity, although there are slight differences between polls depending on methodology, time period, and changes in circumstance.

In Bosnia and Herzegovina, the polls show significant differences in foreign policy preferences along ethnic and entity lines, with Serbs being keener to side with Russia and, to lesser extent China, than with the West. Their perceptions are mirroring those of their neighbours in Serbia. The threat stemming therefrom is that the country's foreign policy decision-making is blocked or seriously hampered (e.g. NATO integration, sanctions on Russia, Kosovo recognition) and that malign actors could benefit from ethnic cleavages. Russia is actively using these divides to destabilise the country and increase its influence. The opportunity comes from the finding that citizens are mostly aware that their own political leaders stir inter-ethnic tensions to the detriment of shared national interest such as economic growth or reducing brain drain. It is of essence to fight disinformation and bridge the gaps in the ethnically entrenched media scene. Indeed, political leaders are a factor increasing the sense of threat throughout the region as they are seen as a major source of tension in the countries of the region, showing a turbulent environment, considering in addition that political parties also have the highest level of distrust among respondents across all countries.

Thy neighbour is thy threat: intra-regional insecurity

In the case of the Western Balkans, another concerning issue that is revealed by the survey data is that the threat is seen as coming from within the region, and between neighbouring countries. Such data place the region in a context of tension, which makes it vulnerable to external actors and influence. Namely, these intra-regional fears can easily be utilised to spread fear and a sense of insecurity and to empower political

¹³⁴ Predrag Petrovic and Srdjan Hercigonja, There is No Democracy in Serbia, nor is it Desirable (Belgrade: BCSP and KCSS, 2022). <https://bezbednost.org/wp-content/uploads/2022/01/There-is-No-Democracy-in-Serbia-nor-is-it-Desirable.pdf>

entrepreneurs who mobilise these sentiments. As it has been shown, most citizens believed that it was political parties which fuelled sentiments of tension within their countries. In addition, different external actors utilise these divisions and tensions, making the countries vulnerable to their influence.

Russian influence in the region

Years of Russian presence in Montenegro have left consequences, which explains why a considerable number of citizens view Russia and Vladimir Putin in a positive way, and which poses a potential threat. However, there is also opportunity as the respondents strongly support EU membership, and the current government is taking steps in that direction. Therefore, the threat of Russian interference is medium, especially after 2016 and the failed attempt to prevent Montenegro from joining NATO. However, it cannot be completely ruled out because as long as corruption of local political elites and national divisions among citizens remain, Russia can build on that to gain leverage in Montenegro. The threat of China expanding its influence in Montenegro is even less likely, as China has very limited impact on both ruling and opposition parties and is currently not against Montenegro's Euro-Atlantic aspirations. However, given their shared anti-Western stance, Chinese influence complements Russian efforts, which could potentially amplify anti-Western sentiment among Montenegrin citizens.

Digital frontiers and vulnerabilities

The digital space is another factor which emanates as a threat, both in its potential for the spread of disinformation and its threat to data and cybersecurity. Securimeter notes that the spread of disinformation poses a real threat to the erosion of democracy in the region, and is not only affected by foreign influence but also by political players within the countries and the region. The spread of disinformation has not gone unnoticed by citizens, as 65 % of respondents to the Balkan Barometer have noted that there has been a spread of fake news in their countries¹³⁵. This tendency has been least noted in Kosovo (56 %) and most noted in North Macedonia (73 %)¹³⁶.

Albania, Montenegro, and Bosnia and Herzegovina have all been subjected to cyber threats that disabled websites, put personal data of citizens in jeopardy and exposed vulnerabilities of their systems. As a result, the leading concerns in the region as it pertains to worries related to the use of digital tools, are the safety of children (47 %) and cyberattacks (41 %)¹³⁷. This marked a change from previous years before the cyberattacks, when over half of the respondents (51 %) claimed to not have worries in terms of using the internet¹³⁸. Therefore, the digital space has become a growing concern and threat in the region, while the same has not been addressed properly by any of the countries of the region.

¹³⁵ Regional Cooperation Council. 2023. Western Balkans Securimeter 2023, p 14. Available at: <https://www.rcc.int/securimeter/publications>

¹³⁶ Ibid.

¹³⁷ Ibid. p 63

¹³⁸ Ibid.

2.3.2. Opportunity

EU as an opportunity and repellent of external threats

In addition, it is important to note that the support of the EU as an opportunity and a repellent to other external threats cannot be taken for granted in the region. There has been a decrease of support for EU membership among some countries in the region, notably North Macedonia, where there was a drop of 6 points as per the Balkan Barometer, making it the second country after Serbia least supporting of membership. In Kosovo, too, there was a drop of 7 points, leaving the support at 66 %. The 2023 assessment is prior to the visa liberalisation taking effect in the country. However, it is most likely affected by the EU sanctions in the country after the Banjska attack¹³⁹. Considering the importance of the EU in the region, particularly in regard to democratisation, a drop of support should be taken as a warning sign for fixing course.

Regional initiatives which encourage free movement and open opportunities

In Serbia, there has long been a pro-Russian and anti-Western sentiment among citizens, partly due to NATO's military intervention in 1999. This sentiment was further strengthened with the rise to power of the Serbian Progressive Party (SNS), which, through its controlled media, spread pro-Russian and anti-Western propaganda, eroding public trust in democracy, the rule of law, and EU integration. Additionally, the ruling party has also propagated nationalist rhetoric, fostering mistrust among citizens toward certain neighbouring countries. The widespread pro-Russian and nationalist views, along with anti-Western sentiment, pose a significant threat to Serbia's return to reforms aimed at EU membership.

However, there is an opportunity in the fact that most Serbian citizens support free movement, the exchange of information, and a common market for goods and labour in the Western Balkans, despite having negative opinions about some regional countries. Moreover, while citizens see Albania as a hostile country, they still support the Open Balkan initiative, where Albania, along with Serbia, plays a central role. Additionally, in domestic politics, citizens prioritise economic improvement, and they consider attracting foreign investments one of the more important foreign policy priorities. An opportunity also lies in the fact that citizens still recognise the EU as a significant source of non-repayable financial aid, even though only 40 % of them support Serbia's EU accession.

¹³⁹ Regional Cooperation Council. 2023. Western Balkans Securimeter 2023, p 3, available at: <https://www.rcc.int/securimeter/publications>

3. PERCEPTION OF EXTERNAL ACTORS IN THE CANDIDATE COUNTRIES OF THE EASTERN NEIGHBOURHOOD

3.1. Context

While often lumped together into the EU's Eastern Neighbourhood, and all having been the targets of Russia's aggression and imperial foreign policy, Georgia, Moldova, and Ukraine have quite different internal and external situations and challenges. Currently all three countries are the EU candidate countries, having been granted this status in the wake of Russia's full-scale invasion against Ukraine on 24 February 2022.

Still, the social and political attitudes and orientations in all three countries are not necessarily aligned. While Russia's hybrid and then the full-scale war against Ukraine solidified Ukraine's Euro-Atlantic geopolitical orientation and also consolidated Ukrainian society and its civic and political identity as oppositional to Russia, the recent elections and referendum in Moldova and Georgia have shown a significant level of pro-Russian sentiments, which is also reflected in their economic and diplomatic relations and rhetoric.

Georgia

Georgia was granted candidate status by the European Union in December 2023, having long pursued closer ties with the EU as part of the European Neighbourhood Policy (ENP) and Eastern Partnership (EaP). However, Georgia's path towards EU membership has faced significant challenges, primarily because of democratic concerns, political instability, and territorial disputes. Although Georgia has long declared its commitment to European and Euro-Atlantic integration, progress has been slow, compounded by internal political turmoil, democratic backsliding and regional tensions. The ruling Georgian Dream party has recently been taking steps that seem to move the country further away from EU integration – in particular by passing a law on 'foreign agents' similar to the Russian law. The draft law was met with widespread political protests¹⁴⁰.

Amid these protests, understanding the perceptions of Georgian citizens regarding the EU and other external actors can provide deeper insights into how the EU's influence in the region is viewed and how the accession process might evolve moving forward.

Moldova

The Republic of Moldova has been an EU candidate country since June 2022. Following the recommendation of the European Commission and the European Council's decision on 14 December 2023, Moldova launched accession negotiations with the EU on 25 June 2024. The bilateral screening began in July 2024 and is expected to last approximately 18 months. It is anticipated that Cluster I on fundamentals will be assessed by the end of 2024. Following the European Commission's report, negotiations on the EU Accession Treaty are expected to begin as early as 2025 with Chapter 23. The Moldovan Government aims to finalise

¹⁴⁰ Piaskowksa, Gosia. (2024). "Trouble in Tbilisi: How Europeans can keep Georgia's European dream alive". *ECFR Policy Alert*. <https://ecfr.eu/article/trouble-in-tbilisi-how-europeans-can-keep-georgias-european-dream-alive/>

negotiations on all 35 chapters of the EU Accession Treaty by 2028, in line with the national objective of being ready for EU membership by 2030.

Moldova's EU accession process is not hindered by its relations with any EU Member States or other candidate countries. In fact, Moldova has successfully enhanced its bilateral relations with every single EU Member State, Western Balkan countries, and Ukraine. Moldova is one of the few candidate countries without any bilateral disputes with EU Member States or other candidates. Its proactive role on the international stage, particularly its solidarity and support for Ukraine, has further enhanced its global standing. Consequently, Moldova's EU accession process reflects a complex landscape shaped by political, societal, and geopolitical factors. While there is general support for EU integration across the political spectrum and among a significant portion of the public, various challenges and influences complicate the process. Following the favourable constitutional referendum held in Moldova on October 20, 2024, the revised Constitution of the Republic of Moldova, which enshrines the strategic objective of EU accession, entered into force on November 5, 2024.¹⁴¹

Ukraine

Ukraine's path to closer relations with the EU has been accompanied by dramatic events in Ukrainian history. An Association Agreement was signed after the Maidan Revolution in 2014, and the application for the EU membership was submitted four days after Russia's unprovoked and unjustified full-scale invasion in February 2022. The candidate status for Ukraine was granted in June 2022, and the accession negotiations began in June 2024.

While there is no internal contestation to the accession process in Ukraine, the process is still marked by the Russo-Ukrainian war and the alliances formed during the aggression. Within the EU, the most strained relations are with Hungary. Orban's government promotes Russia's interests and pushes into the discourse the idea of peace negotiations while using Hungary's veto power in the EU institutions to block or, at least, slow down support to Ukraine. At the same time, relations with some candidate countries are also challenging, e.g. Serbia, which tries to balance between the West and Russia and did not introduce anti-Russia sanctions, and Georgia, whose government is considered pro-Russian even by the President of Georgia and opposition parties and had been exploiting the topic of war in Ukraine within the electoral campaign. Turkey, being a NATO member, is balancing between the West, Ukraine and Russia by, on the one hand, strengthening its cooperation with Ukraine in the military sphere, and, on the other hand, assisting Russia to bypass sanctions. Among other actors that play on Russia's side are Iran and North Korea with their direct military supplies to Russia and other BRICS members, particularly China, with their peace initiatives and plans. At the same time, apart from the EU, the US and the UK are heavily involved in support to Ukraine.

¹⁴¹ The Law amending the Constitution of the Republic of Moldova, adopted on October 20, 2024, within the Constitutional Republican Referendum, Official Gazette No. 457-458 of November 5, 2024, available in RO at: <https://monitorul.gov.md/ro/monitorul/view/pdf/2979/part/1#page=12>

3.2. Exploration of state of the art (survey data)

3.2.1. Policy goals

Foreign policy

The recent public opinion surveys reaffirm Georgians' strong commitment to European integration, with 79 % expressing support for EU membership¹⁴². This support has significantly increased over the past year, particularly regarding political and economic cooperation with the EU. The majority of Georgians believe that the EU and US should be Georgia's closest economic allies, with support being highest in Tbilisi and lowest in ethnic minority regions¹⁴³. Despite this strong pro-Western sentiment, there has been a decrease in the number of people who believe Georgia should have an exclusively pro-Western foreign policy¹⁴⁴. A plurality of Georgian Dream (GD) supporters favour a pro-Western policy that maintains good relations with Russia, while opposition supporters show the highest support for an exclusively pro-Western approach¹⁴⁵.

Foreign policy preferences are largely pro-Western, with 70 % in favour of EU integration (48 % fully supporting Georgia's membership in the EU, and an additional 22 % somewhat supporting it). In contrast, only 7 % express support for joining the Eurasian Economic Union (EAEU)¹⁴⁶. Moreover, 37 % believe the country's foreign policy should be strictly pro-Western, although this is a 10 % decrease since mid-2022. However, the idea of maintaining good relations with Russia alongside a Western orientation has grown slightly, from 31 % to 36 %¹⁴⁷.

EU and NATO membership remain important foreign policy goals, with 24 % of respondents citing EU membership as a priority, while NATO membership is mentioned by 14 %. Relations with Russia are noted by 12 % of respondents, reflecting a nuanced perspective on foreign policy. On domestic issues, jobs (36 %), poverty (33 %), territorial integrity (27 %), and rising prices (34 %) are identified as the most important problems in this survey¹⁴⁸.

In terms of international relations, 51 % of respondents of the same survey regard the EU as Georgia's most important political partner, and 43 % consider it the most important economic partner. Russia, on the other

¹⁴² NDI. (2023). "Taking Georgians' pulse Findings from October-November 2023 face to face survey". Retrieved here: https://www.ndi.org/publications/ndi-poll-georgian-citizens-remain-committed-eu-membership-nation-united-its-dreams-and_on_29_October_2024. P. 5

¹⁴³ Ibid. P. 86.

¹⁴⁴ Ibid. P. 79.

¹⁴⁵ Ibid. P. 80.

¹⁴⁶ The Caucasus Research Resource Centers. (2024) "Caucasus Barometer 2024 Georgia". Retrieved through ODA - <http://caucasusbarometer.org> on 7 October 2024.

¹⁴⁷ The Caucasus Research Resource Centers. (2023) "NDI : Public attitudes in Georgia, October 2023". Retrieved through ODA - <http://caucasusbarometer.org> on 7 October 2024.

¹⁴⁸ The Caucasus Research Resource Centers. (2023) "Knowledge of and attitudes toward the EU in Georgia, 2023". Retrieved through ODA - <http://caucasusbarometer.org> on 7 October 2024.

hand, is viewed as the greatest political threat (77 %) and economic threat (69 %) to Georgia. Despite this, 57 % support continued dialogue with Russia, although 40 % are opposed to this approach¹⁴⁹.

Support for Georgia's EU membership is strong, with 86 % of respondents either fully or somewhat in favour of joining. Of these, 45 % believe membership would bolster the country's economy. Political instability is seen as the biggest obstacle to EU accession, with 27 % highlighting it as a challenge¹⁵⁰.

The orientation towards the EU is a crucial driver for institutional reform and strategic policy planning in Moldova. The 2024 National Action Plan for EU accession (NAP)¹⁵¹ outlines key legislative and reform actions across all 33 chapters of EU *acquis*, as well as the remaining commitments under the EU-Moldova Association Agreement by 2030. Also, on the strategic planning framework, Moldova's National Development Strategy 2030 'European Moldova'¹⁵², serves as a comprehensive roadmap designed to align the country with the EU's economic convergence goals. The NAP coupled with 2030 Moldova's Development Strategy – European Moldova, provides for the necessary strategic policy framework to support the accession process.

Maia Sandu, recently re-elected as President of the Republic of Moldova for a second term on 3 November 2024, the Government and the pro-European parliamentary majority, the Party of Action and Solidarity (PAS) are strong proponents of EU accession, seeing it as crucial for modernisation, economic growth, and democracy consolidation.

According to recent opinion polls, most Moldovans support Moldova's EU integration, particularly the younger and urban populations, recognising its economic benefits, such as improved living standards and access to the European market. While a significant portion of the population supports EU-led democratic reforms, standards for rule of law, and anti-corruption measures, others, even if in the minority, still comprise a significant number of Moldovans (about 30 %) who are influenced by Russian narratives and view Russian policies as more aligned with Moldova's traditional and cultural values. However, though the population remains split, with rural areas often showing more scepticism towards EU integration, there is a growing preference for Moldova's alignment with the EU's policy goals. A poll conducted by IRI¹⁵³ in July 2024 indicated that 53 % support EU membership.

In October 2023, the overall support had risen to 63 %, according to a Watchdog Social political Survey¹⁵⁴, while opposition to EU membership had decreased to 32 %. The number of undecided voters has also dropped, and these figures do not include Moldova's large diaspora, which overwhelmingly supports EU integration. As a result of the national Referendum held on 20 October 2024, 50.4 % of Moldovan citizens

¹⁴⁹ IRI. (2023). "Georgian Survey of Public Opinion: September-October 2023". Retrieved here: <https://www.iri.org/resources/georgian-survey-of-public-opinion-september-october-2023/> on 7 October 2024.

¹⁵⁰ IRI. (2023). "Georgian Survey of Public Opinion: September-October 2023". Retrieved here: <https://www.iri.org/resources/georgian-survey-of-public-opinion-september-october-2023/> on 7 October 2024.

¹⁵¹ Government Decision 829/2023 on the adoption of the National Plan for EU Accession of the Republic of Moldova (2024-2027), available in RO: https://www.legis.md/cautare/getResults?doc_id=141820&lang=ro#

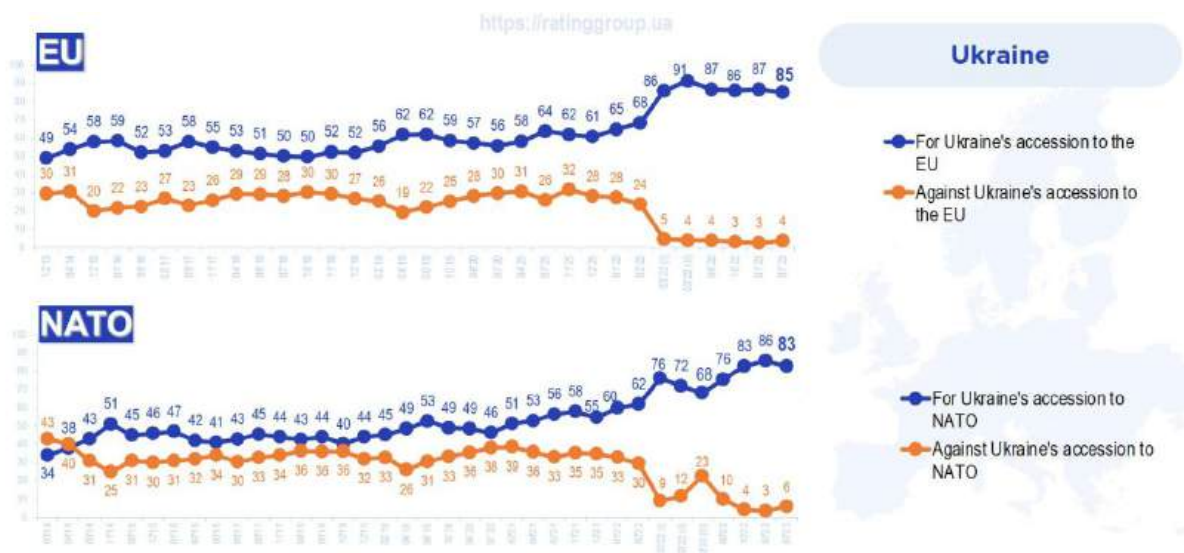
¹⁵² https://www.legis.md/cautare/getResults?doc_id=134582&lang=ro

¹⁵³ IRI Moldova Poll, July 2024, July 2024: <https://www.iri.org/news/iri-moldova-poll-shows-strong-voter-enthusiasm/>

¹⁵⁴ Watchdog.md / CBS-Axa Social-Political Survey, October 2024, available at: <https://watchdog.md/en/polls/208333/sondaj-socio-politic-octombrie-2024/>

voted to include European integration as a strategic objective in the Constitution of the Republic of Moldova, showing enhanced social resilience, given the unprecedented malign interference by Russia and their proxies aimed at undermining Moldova’s democratic choices of Moldovans.

On 7 February 2019 the Ukrainian Parliament passed an amendment into the Constitution of Ukraine, which proclaimed the inevitability of the Euro-Atlantic course of Ukraine as the one to ensure the solidarity and social cohesion of Ukrainians as well as their European identity. Such geopolitical orientations have been supported not only by most political parties, by the Parliament and by the government of Ukraine, but also by the majority of Ukrainian citizens. Moreover, the level of support for Ukraine joining the EU and NATO has risen even more after the full-scale invasion of Ukraine by Russia on 24 February 2022. For example, according to the regular surveys conducted by the Sociological Group Rating, in July 2020, 56 % were for the EU Ukraine’s accession to the EU and 30 % against, while in July 2021, 64 % supported joining and 26 % were against it¹⁵⁵. Overall, in 2020 the difference between those Ukrainians who supported joining the EU and those who opposed it was 26-27 % in favour of joining and it then slightly increased to 37-40 % over 2021. The popular support for Ukraine joining NATO is slightly smaller but comparable and has the same dynamic. For example, the same surveys demonstrate 46 % for joining NATO and 38 % against in July 2020 and 56 % for and 33 % against in July 2021.



The full-scale invasion significantly increased the levels of support among Ukrainians for Ukraine joining the EU and NATO. Since February 2022, more than 80 % of the population are in favour of the EU accession and joining NATO (with only 3-5 % against)¹⁵⁶. Most recently, another survey done by the Razumkov Centre in

¹⁵⁵ SG Rating. (2023). Support for international unions: survey in Ukraine and Europe (July 4-10, 2023). https://ratinggroup.ua/en/research/ukraine/p_dtrimka_m_zhnarodnih_soyuz_v_opituvannya_v_ukra_n_ta_vrop_4-10_lipnya_2023.html

¹⁵⁶ SG Rating. (2023). Support for international unions: survey in Ukraine and Europe (July 4-10, 2023). https://ratinggroup.ua/en/research/ukraine/p_dtrimka_m_zhnarodnih_soyuz_v_opituvannya_v_ukra_n_ta_vrop_4-10_lipnya_2023.html

September 2024¹⁵⁷ showed that if the referendum for joining the EU were to be held at that moment, 81 % would take part in it, and out of that number 88 % would support the joining (with 8 % against it). Regarding NATO, 82 % would have attended the referendum, out of which 86 % would have voted for joining NATO, with 10 % against.

On 14 December, 2023, Ukraine started negotiations to join the European Union. This encouraged many agencies to ask questions about expectations on the negotiations results and progress in their public opinion polls. According to the IRI's survey of September-October 2024, 20 % of Ukrainians believed that it would take less than 3 years for Ukraine to become an EU member, 34 % estimated the timeframe as '3 to 5 years', while 19 % thought that it would take more than 10 years (only 3 % said that Ukraine won't become a member)¹⁵⁸. In NDI's survey done in May 2024, by 2030, 77 % expected Ukraine to become an EU member (90 % wanted this) and 71 % expected Ukraine to become a NATO member (84 % wanted this)¹⁵⁹.

The War

Since 2022, the main policy priorities for Ukrainians are in fighting and winning the war and restoring its territorial sovereignty. The IRI report based on a survey conducted in September-October 2024 showed that 88 % of Ukrainians believe in Ukrainian victory in the war, while 71 % think that it should regain all its occupied territories and restore the borders of 1991¹⁶⁰. According to the KIIS's national representative survey conducted in October 2024, the majority (58 %) of Ukrainians preferred an option 'Under no circumstances should Ukraine give up any of its territories, even if because of this the war will last longer and there will be threats to the preservation of independence', while 36 % opted for 'In order to achieve peace as soon as possible and preserve independence, Ukraine can give up some of its territories'¹⁶¹. In the IRI survey in September-October 2024, 31 % of Ukrainians believed that the war would end within a year while another 33 % gave it one or two years¹⁶².

¹⁵⁷ Razumkov Centre. (2024). Citizen support for Ukraine's accession to the European Union and NATO. Attitude towards foreign countries. Attitude towards peace negotiations. <https://razumkov.org.ua/napriamky/sotsiologichni-doslidzhennia/pidtrymka-gromadianamy-vstupu-ukrainy-do-yevropeiskogo-soiuzu-ta-nato-stavlennia-do-inozemnykh-derzhav-stavlennia-do-myrynykh-peregovoriv-veresen-2024r>

¹⁵⁸ IRI (2024). National Survey of Ukraine: September-October 2024. <https://www.iri.org/resources/national-survey-of-ukraine-sept-oct-2024/> Slide 54.

¹⁵⁹ NDI. (2024). May 2024 Opportunities and Challenges Facing Ukraine's Democratic Transition. <https://www.ndi.org/sites/default/files/May%202024%20Opportunities%20and%20Challenges%20Facing%20Ukraine%E2%80%99s%20Democratic%20Transition%20%28English%29.pdf> . Slide 24.

¹⁶⁰ IRI. (2024). IRI Survey: Majority of Ukrainians believe in the victory over Russia and support the return of the lost territories (Опитування IRI: більшість українців вірить у перемогу над росією та підтримує повернення втрачених територій). 13 November 2024. <https://iri.org.ua/survey/opytuvannya-iri-bilshist-ukrayintsiv-viryt-u-peremohu-nad-rosiyeyu-ta-pidtrymuje-povernennya>; IRI (2024). National Survey of Ukraine: September-October 2024. <https://www.iri.org/resources/national-survey-of-ukraine-sept-oct-2024/>

¹⁶¹ Hrushetskyi A. (2024) Dynamics of readiness for territorial concessions and the factor of security guarantees for reaching peace agreements. KIIS. September-October 2024 Omnibus. <https://www.kiis.com.ua/?lang=eng&cat=reports&id=1447&page=1>

¹⁶² IRI (2024). National Survey of Ukraine: September-October 2024. <https://www.iri.org/resources/national-survey-of-ukraine-sept-oct-2024/>

These results correspond with those obtained by the Rating Group on behalf of the Carnegie Endowment for International Peace in March 2024¹⁶³. According to this, 83 % were confident that Ukraine will eventually liberate all its territories. 54 % of Ukrainians were against Ukraine negotiating with Russia to achieve peace and 43 % supported it. In answer to another question, 51 % said that Ukraine should fight until it liberates all its territory (1991 borders), 12 % to fight until it liberates territories occupied after February 2022, and only 21 % stated that Ukraine should 'seek a compromise to end the war through negotiations'¹⁶⁴. Whilst, according to the NDI's survey conducted by KIIS in May 2024¹⁶⁵, the public support for the negotiations increased: 57 % of Ukrainians support peace negotiations with Russia to achieve peace, there were clearly conditions and red lines for any compromises: 60 % were against surrendering territories occupied since 2014 (Crimea and parts of Donetsk and Luhansk regions), 77 % refused to negotiate based on the current territorial status quo (as of May 2024), and 74 % rejected Russia's demand for Ukraine to stay neutral and forgo joining NATO and the EU¹⁶⁶. It is also important to note that, despite all the hardships, in October 2024, the majority of Ukrainians (63 %) said that they 'are willing to endure the war as long as it takes'¹⁶⁷.

Internal reforms and policies

Unemployment is the most pressing issue for Georgian citizens, with 26 % of respondents identifying it as their primary concern, followed by poverty (12 %) and political instability (10 %)¹⁶⁸. According to another survey, inflation and rising prices rank high, with 37 % viewing it as the most critical national issue, closely followed by unemployment (35 %) and poverty (28 %)¹⁶⁹.

The Georgian government's key policy goals align with many of the public's concerns. Economic recovery and development in the aftermath of the Covid-19 pandemic remain central priorities, along with ensuring a stable and safe environment for citizens. The government's programme also emphasises the importance of democratic consolidation and continued European and Euro-Atlantic integration, reflecting both internal and external policy objectives aimed at promoting stability and development in the country¹⁷⁰.

¹⁶³ Gonik N., Ciaramella E. (2024). War and Peace: Ukraine's Impossible Choices. Carnegie Endowment for International Peace. June 11 2024. <https://carnegieendowment.org/research/2024/06/ukraine-public-opinion-russia-war?lang=en>

¹⁶⁴ Carnegie Endowment for International Peace and SG Rating. (2024) Social expectations regarding the end of war: First wave. https://carnegie-production-assets.s3.amazonaws.com/static/files/Carnegie_survey_Ukraine_war_Ukrainian_public_opinion_March_2024.pdf. Slide 9.

¹⁶⁵ NDI. (2024). As Costs of War Mount, Ukrainian Demands for Inclusive Democracy Remain Strong. <https://www.ndi.org/publications/costs-war-mount-ukrainian-demands-inclusive-democracy-remain-strong>

¹⁶⁶ NDI. (2024). As Costs of War Mount, Ukrainian Demands for Inclusive Democracy Remain Strong. <https://www.ndi.org/publications/costs-war-mount-ukrainian-demands-inclusive-democracy-remain-strong>

¹⁶⁷ Hrushetskyi A. (2024). Perception of Russia's safety margin and how long Ukrainians are willing to bear the burden of war. 04.11.2024. KIIS. <https://www.kiis.com.ua/?lang=eng&cat=reports&id=1445&page=1>

¹⁶⁸ The Caucasus Research Resource Centers. (2024) "Caucasus Barometer 2024 Georgia". Retrieved through ODA - <http://caucasusbarometer.org> on 7 October 2024.

¹⁶⁹ The Caucasus Research Resource Centers. (2023) "NDI : Public attitudes in Georgia, October 2023". Retrieved through ODA - <http://caucasusbarometer.org> on 7 October 2024.

¹⁷⁰ Government of Georgia. (2020). "Government Program 2021-2024". Retrieved here: https://www.gov.ge/files/41_78149_280277_GP.pdf on 7 October 2024.

Among Moldovan policy actors, EU membership provides both a framework and a strong incentive for the country to implement significant reforms across various sectors, particularly in governance, justice, public administration, and national security. These reforms are essential for aligning Moldova with EU standards and meeting the criteria required for accession. These reforms are relevant to meet the EU accession political criteria, which include the stability of democratic institutions, the rule of law, and the protection of human rights. The EU's membership criteria are based on well-consulted policies that address the needs of the population and provide clear guidance for institutional reforms. This model helps Moldova strengthen governance and enhance the functionality of its institutions, making the EU not only a destination but a roadmap for Moldova's sustainable development and transformation.

An IPRE Poll from July 2024¹⁷¹ reveals Moldovan citizens' policy priorities for advancing the country's prospects of joining the European Union. The top priority, highlighted by 50.6 % of respondents, is combating corruption, indicating a strong public demand for transparency, accountability, and a reduction in corruption-related issues, which are seen as major barriers to EU integration. Following this, 33.8 % of respondents emphasise the need for economic development, underscoring the importance of fostering growth and stability to align with EU standards. Judicial reform ranks third, with 32.6 % of respondents viewing it as a crucial step, reflecting the public's belief in establishing a fair and efficient legal system as essential for meeting EU membership criteria. Health sector reform (20.2 %) and education reform (18.9 %) are also notable priorities, suggesting that Moldovans value improvements in social services to enhance the quality of life and bring standards closer to those of EU countries. Additional priorities include ensuring equal opportunities for all citizens (16.2 %) and aligning national legislation with EU laws (9.7 %), which are viewed as necessary steps in fulfilling the EU's requirements. The data highlights Moldovans' focus on fundamental reforms in governance, economy, and social systems to align with European standards and support the path to EU accession.

In September 2024 in Ukraine, the EU Advisory Mission (EUAM) ordered a survey on the public opinion support for the reforms and the EU's support of them¹⁷². Thus, 74 % defined fighting corruption as the most critical reform (and 62 % marked it as priority for the EU support). Next ranked were reforms in national security and defence and the judicial system reform (36 % support each). Regarding the EU support, such areas as assistance to liberated territories (43 %), support in investigating war crimes (38 %), and ensuring fair justice (31 %) were defined as the most relevant areas for Ukraine apart from fighting corruption.

Overall estimation of where things are heading

In Georgia, since 2014, there has been a prevailing belief that the country is heading in the wrong direction, with 54 % of citizens holding this view in 2023 compared with 39 % who believe the opposite. The top three

¹⁷¹ IPRE Opinion Poll „Citizen's Perceptions on EU integration, 30 July 2024, https://www.ipn.md/en/over-66-of-moldovans-intend-to-participate-in-referendum-7967_1106099.html

¹⁷² Sociological Group Rating. (2024). Success or not? How Ukrainians assess law enforcement reforms and the EU's support. 28 October 2024. <https://ratinggroup.ua/en/research/ukraine/usprih-chi-ni-yak-ukrayinci-ocinyuyut-reformuvannya-organiv-pravoporyadku-ta-pidtrimku-yes.html>

challenges to Georgia's democratic development are seen as economic development (67 %), unemployment (49 %) and territorial disputes (42 %), according to polling data from the International Republican Institute¹⁷³.

This could well be compared to the perceptions and feelings in Moldova. In February 2024, 59 % felt that things were heading in the wrong direction while 36 % remain positive¹⁷⁴. Among the top problems facing Moldova currently it was mostly economic ones that were listed: the prices and cost of living (43 %), low income and corruption (both at 28 %), and unemployment (24 %).

After 24 February 2022, Ukrainians revised their assessment of 'the way things are heading' towards positive. In September 2024, Ukrainians had been optimistic about Ukraine overcoming current problems and trials: 30 % believed that Ukraine would do that within a year or two, 46 % that it would take longer. Only 11 % said that Ukraine won't be able to overcome them at all¹⁷⁵. Moreover, according to the Democratic Initiative Foundation's survey from August 2024, the majority of Ukrainians (59 %) are building and envisioning their future in Ukraine. Another 27 % would want it to be in Ukraine, while only 8 % would prefer otherwise¹⁷⁶.

3.2.2. Economic interests

The majority of Georgian citizens prioritise the EU and the US as 'Georgia's closest economic allies'. In the NDI Survey from October 2024, 59 % of respondents stated that Georgia should have the closest economic cooperation with the EU, 34 % with the US, 25 % with Russia, 18 % with Turkey, and 13 % with NATO¹⁷⁷. This preference for Western economic partnerships has shown a significant increase over the past year, with support for economic cooperation with the EU rising notably¹⁷⁸.

The survey reveals interesting partisan differences in economic alliance preferences. While support for economic cooperation with the EU and US is relatively higher among opposition supporters, approximately one third of Georgian Dream supporters and one fifth of opposition supporters express a desire for close economic cooperation with Russia¹⁷⁹.

¹⁷³ IRI. (2023). "Georgian Survey of Public Opinion: September-October 2023". Retrieved here: <https://www.iri.org/resources/georgian-survey-of-public-opinion-september-october-2023/> on 7 October 2024.

¹⁷⁴ <https://www.iri.org/wp-content/uploads/2024/04/NationalSurveyMoldova2024.pdf>

¹⁷⁵ Razumkov Centre. (2024). Citizen support for Ukraine's accession to the European Union and NATO. Attitude towards foreign countries. Attitude towards peace negotiations. <https://razumkov.org.ua/napriamky/sotsiologichni-doslidzhennia/pidtrymka-gromadianamy-vstupu-ukrainy-do-yevropeiskogo-soiuzu-ta-nato-stavlennia-do-inozemnykh-derzhav-stavlennia-do-myrynykh-peregovoriv-veresen-2024r>

¹⁷⁶ DIF. (2024). Ukraine's Independence Day: value of the state, unity and volunteering in times of war. 30 August 2024. <https://dif.org.ua/article/ukraines-independence-day-value-of-the-state-unity-and-volunteering-in-times-of-war>

¹⁷⁷ NDI. (2023). "Taking Georgians' pulse Findings from October-November 2023 face to face survey". Retrieved here: <https://www.ndi.org/publications/ndi-poll-georgian-citizens-remain-committed-eu-membership-nation-united-its-dreams-and> on 29 October 2024. P. 86

¹⁷⁸ Ibid.

¹⁷⁹ NDI. (2023). "Taking Georgians' pulse Findings from October-November 2023 face to face survey". Retrieved here: <https://www.ndi.org/publications/ndi-poll-georgian-citizens-remain-committed-eu-membership-nation-united-its-dreams-and> on 29 October 2024. P. 88

When considering both economic and political partnerships, the EU and US emerge as the most desired partners for Georgians. The EU, in particular, remains the ‘undeniable destination of choice for the majority of Georgians’, with support being highest in big cities and among young citizens¹⁸⁰. However, it’s worth noting that support is lowest in ethnic minority regions¹⁸¹.

Georgians perceive significant economic threats, with Russia being viewed as the primary source of concern. According to the IRI survey conducted in March 2023, an overwhelming 76 % of respondents identified Russia as a major economic threat to Georgia¹⁸². This high percentage indicates that despite some support for economic cooperation with Russia, a large majority of Georgians are wary of the economic risks associated with their northern neighbour.

The perception of Russia as an economic threat is particularly noteworthy given that 25 % of respondents in the NDI survey from October-November 2024 supported economic cooperation with Russia¹⁸³, highlighting a complex and somewhat contradictory relationship between economic interests and perceived threats in Georgian public opinion.

Moldovan authorities view the EU accession process as a driving force for economic reforms, particularly in business development and regional economic growth, as well as for the country’s gradual integration into the EU’s single market. The focus is on attracting European investments, technical support, and securing access to EU markets to fuel Moldova’s economic growth. Among policymakers, the access to the EU’s single market of over 450 million consumers is viewed as a major driver for export growth, foreign investment, and economic modernisation. This would result in improvements to infrastructure, job creation, and overall living standards by boosting economic competitiveness and enhancing social services in Moldova.

Comparing the 2024¹⁸⁴ and 2023¹⁸⁵ IPRE polls with Moldova’s actual 2023 trade data¹⁸⁶ reveals key alignments and gaps in public perception of trade partners. The EU is consistently seen as Moldova’s most significant trade partner, with 51.2 % in 2024 and 44.6 % in 2023 identifying it as such, closely matching reality. In 2023, the EU accounted for 53.7 % of Moldova’s trade, including 65.4 % of exports, underscoring Moldova’s deepening economic ties with the bloc. Ukraine and Russia follow as perceived major partners, with a slight shift favouring Ukraine in 2024. However, while Ukraine accounts for 13.1 % of trade, Russia’s

¹⁸⁰ Ibid. p.89-90

¹⁸¹ Ibid. p.95

¹⁸² IRI. (2023). “Georgian Survey of Public Opinion: September-October 2023”. Retrieved here: <https://www.iri.org/resources/georgian-survey-of-public-opinion-september-october-2023/> on 7 October 2024. P. 37

¹⁸³ NDI. (2023). “Taking Georgians’ pulse Findings from October-November 2023 face to face survey”. Retrieved here: https://www.ndi.org/publications/ndi-poll-georgian-citizens-remain-committed-eu-membership-nation-united-its-dreams-and_on_29_October_2024.

¹⁸⁴ Sondaj de opinie “Percepțiile cetățenilor cu privire la procesul de integrare europeană al Republicii Moldova”. Available at: https://ipre.md/wp-content/uploads/2024/07/Sondaj-IPRE_CBS-AXA-30.07.2024_fin-1.pdf

¹⁸⁵ Public opinion survey “Perception of the citizens regarding Moldova’s European integration process”. Available at: https://ipre.md/wp-content/uploads/2023/07/Public-opinion-poll_EU_Moldova_IPRE-CBS-AXA-11.07.2023_EN_fin.pdf

¹⁸⁶ Moldova, EU trade relations with Moldova. Facts, figures and latest developments. Available at: https://policy.trade.ec.europa.eu/eu-trade-relationships-country-and-region/countries-and-regions/moldova_en

role has decreased to 3.7 %, suggesting an overestimation of Russia’s economic influence due to historical ties, while Ukraine’s importance is increasingly recognised amidst regional changes.

As for other external partners there is a varying degree of alignment with actual trade figures. Turkey’s role is relatively consistent, though it is perceived as more significant than its actual trade share of 7.2%. Approximately 11% of Moldovan citizens perceive the US as Moldova’s main trade partner. However, in reality, Moldova’s trade share with the U.S. is minimal, at just 1.5%, highlighting a significant overestimation by respondents. China’s perception aligns closely with its 8.1% trade share, reflecting its growing presence but still limited in Moldova’s economy.

The full-scale aggression of Russia against Ukraine drastically changed the trade ties, partnerships and interests of Ukraine. Since January 2022, the EU, Turkey, and China consistently have been the major trade partners of Ukraine both in export and import. Trade relations with Russia had been decreasing in volume of both export and import since 2013 (in 2014 export and import shrank by approximately 30 % compared to 2013) and almost disappeared after February 2022.

According to the data from the State Statistics Service of Ukraine, in first nine months (January–September) of 2024, the top five countries for export from Ukraine were Poland, Germany, Spain, China, and Turkey, while the top twenty list also included, apart from the other EU countries, Egypt, Moldova, India, and the US¹⁸⁷. The major partners for import to Ukraine were China, Poland, Germany, Turkey, and the US, with imports from China being twice the imports from Poland in volume. The top twenty list from imports apart from the other EU countries also included India, UK, Japan, South Korea (Republic of Korea), Vietnam, Switzerland, and Israel¹⁸⁸. Currently, the major goods for Ukraine to export are various corn and agricultural products, ores and steel, while it mainly imports mineral fuels and oils, telecommunication systems, machinery and motor vehicles, arms and ammunition, explosives, and drones and their components. Thus, the EU has been Ukraine’s largest trading partner, accounting for 56 % of Ukraine’s trade in goods in 2023. In its turn, Ukraine was the 16th biggest trading partner for the EU, with 1.2 % of its total trade in goods in 2023¹⁸⁹. Thus, since the DCFTA in 2016, the volume of trade has almost doubled. It is noteworthy that in Q2 of 2024, Ukraine has a share of almost 35 % of all the EU’s imports of arms and ammunition¹⁹⁰.

The economic ties to other countries and their perceptions in public opinion also include the understanding that Ukraine is currently receiving financial aid from its foreign partners. Since the beginning of the full-scale invasion and by the end of October 2024, Ukraine received \$100.79 bn in foreign financial assistance from

¹⁸⁷ SSC of Ukraine (2024). Ukraine’s foreign trade in goods, January–September 2024. https://ukrstat.gov.ua/operativ/operativ2024/zd/ztt/arh_ztt2024_e.html or https://www.ukrstat.gov.ua/operativ/operativ2024/zd/ztt/ztt0924_ue.xls

¹⁸⁸ SSC of Ukraine (2024). Ukraine’s foreign trade in goods, January–September 2024. https://ukrstat.gov.ua/operativ/operativ2024/zd/ztt/arh_ztt2024_e.html or https://www.ukrstat.gov.ua/operativ/operativ2024/zd/ztt/ztt0924_ue.xls

¹⁸⁹ EC. (2024). EU trade relations with Ukraine. Facts, figures and latest developments. https://policy.trade.ec.europa.eu/eu-trade-relationships-country-and-region/countries-and-regions/ukraine_en

¹⁹⁰ Eurostat. (2024). EU trade with Ukraine - latest developments. Data extracted in August 2024. [https://ec.europa.eu/eurostat/statistics-explained/index.php?title=EU_trade_with_Ukraine_-_latest_developments_\(version_from_20.11.2024\)](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=EU_trade_with_Ukraine_-_latest_developments_(version_from_20.11.2024)).

27 different countries and organisations. The most funds were received from the EU (\$40.5 bn), the US (\$28.2 bn), the IMF (\$11.4 bn), Japan (\$6.3 bn), Canada (\$5.4 bn), and the UK (\$2.6 bn)¹⁹¹.

These facts are well-reflected in the perceptions and attitude that Ukrainians currently have towards other countries and their role and significance in Ukraine's economy. For example, the financial assistance was assessed by Ukrainian experts as effective (4.0 out of 5) and is second in assessment only to the assistance to Ukrainian refugees (4.2 out of 5)¹⁹². To compare the 'sanction against the aggressor' are assessed as not really effective (2.5 out of 5). Media and public discourses in Ukraine also voice concerns over China, Kazakhstan, Turkey and other countries helping Russia to import sanctioned goods and services as well as dual-purpose products.

In a nationwide representative survey (IRI, September-October 2024), the overwhelming majority of Ukrainians (75 %) said that if Ukraine were to join only one international economic union, it should be the EU. Only 2 % were for the 'Custom Union with Russia, Belarus, and Kazakhstan', and 18 % opted for 'the other' (an option where they could give any answer of their own or combine given options)¹⁹³.

Overall, in September 2024, the current economic situation in Ukraine was perceived as rather bad (40 %), while the prevailing estimate for 'one's own material/economic well-being' was assessed as 'neither good nor bad' (49.6 %). Also, around 50 % do not expect either the economic situation in the country or their own to change within the next three months. In the same survey, 12.2 % said that they 'struggle to make the ends meet', while the most popular answer (40.7 %) had been 'overall we have enough to live on and only the bigger purchases such as TV or refrigerator require efforts'¹⁹⁴. This corresponds to the NDI's survey in May 2024, in which only 2 % said that in the past three months they were often without food or hygiene items, and 6 % and 7 % respectively said that that happened to them occasionally. 92 % remarked that they had not been in such situations¹⁹⁵.

To conclude, it should be said that Ukrainians are optimistic about the future. In May 2024, 47 % said that they expected the next generation to be better off than theirs (compared to 24 % who thought they would be worse off)¹⁹⁶.

¹⁹¹ Centre for Economic Strategy. (2024). Ukraine War Economy Tracker (4 November 2024) [https://ces.org.ua/en/tracker-economy-during-the-war/ \(version from 20.11.2024\)](https://ces.org.ua/en/tracker-economy-during-the-war/(version%20from%2020.11.2024)).

¹⁹² Razumkov Centre. (2024). Зовнішня політика України: стан, тенденції, перспективи (вересень–жовтень 2024р.) <https://razumkov.org.ua/napriamky/sotsiologichni-doslidzhennia/zovnishnia-polityka-ukrainy-stan-tendentsii-perspektyvy>

¹⁹³ IRI (2024). National Survey of Ukraine: September-October 2024. <https://www.iri.org/resources/national-survey-of-ukraine-sept-oct-2024/>. Slide 52.

¹⁹⁴ Razumkov Centre. (2024). Оцінки громадянами соціально-економічної ситуації та соціально-економічної політики влади, соціальне самопочуття громадян (вересень 2024р.) (5.11.2024). <https://razumkov.org.ua/napriamky/sotsiologichni-doslidzhennia/otsinky-gromadianamy-sotsialnoekonomichnoi-sytuatsii-ta-sotsialnoekonomichnoi-polityky-vlady-sotsialne-samopochuttia-gromadian-veresen-2024r>

¹⁹⁵ NDI. (2024). May 2024 Opportunities and Challenges Facing Ukraine's Democratic Transition. <https://www.ndi.org/sites/default/files/May%202024%20Opportunities%20and%20Challenges%20Facing%20Ukraine%E2%80%99s%20Democratic%20Transition%20%28English%29.pdf>. Slide 9.

¹⁹⁶ NDI. (2024). May 2024 Opportunities and Challenges Facing Ukraine's Democratic Transition. <https://www.ndi.org/sites/default/files/May%202024%20Opportunities%20and%20Challenges%20Facing%20Ukraine%E2%80%99s%20Democratic%20Transition%20%28English%29.pdf>. Slide 10.

3.2.3. Cultural ties

When it comes to Georgia, Russia often exploits the cultural and historical ties and their common past, despite the 2008 war and Russia's role and support in the secession of South Ossetia and Abkhazia from Georgia. Russia's propaganda capitalises on Georgia's 'traditional values' and presents the EU alignment and 'European values', particularly gender equality and LGBTQ+ acceptance, as threats to the 'Georgian identity'¹⁹⁷. There are also commonalities in how the figure of Stalin is seen and how his cult is maintained in both Russia and Georgia. In a 2024 survey by CRRC¹⁹⁸ survey, 32 % characterised their attitude toward Stalin as 'admiration', 'respect', or 'sympathy', while 27 % chose 'antipathy, irritation', 'fear', or 'disgust, hatred' indicating fragmented opinions about what 'Stalin' represents. 'Some Georgians see Stalin as a rebellious "our boy" who fought existing orders and rose to the top of a system led by Russians, while others admire him as a "wise leader" who stabilised the Soviet Union. Still others condemn him as a tyrant who embodies autocracy'¹⁹⁹.

Still, the situation is different in the younger generations: 63 % of young (below 30) people in Georgia consider that the dissolution of the USSR was a good thing for Georgia²⁰⁰. In contrast to ethnic Georgians (64 %), young people representing Georgia's ethnic minorities (44 %) are less enthusiastic about the Soviet Union's break up. Focus group discussions revealed that some youth highlighted as the negative consequences of the Soviet Union's demise the loss of the special place and role that Georgians had in the USSR²⁰¹.

When talking about their identities and having an option of naming all that applies, the majority of young people in Georgia perceived themselves as citizens of Georgia (94 %), part of their town, village or region (77 %), belonging to their ethnic group (62 %), and belonging to the Caucasus (59 %). Compared to that, they saw themselves less frequently as global citizens (50 %) or as Europeans (41 %). Still, 62 % of young people in Georgia agreed that Georgia is a European country²⁰².

Cultural and historical ties continue to play a significant role in Moldovan attitudes toward external actors. Romania, with shared linguistic and cultural heritage, garners high favourability among Moldovans. While younger populations lean toward European cultural integration, older generations may feel a stronger connection to Russian media and cultural outputs. Cultural initiatives from the EU, like student exchange

¹⁹⁷ Sirbiladze I, (2019). *Russia's Disinformation Campaigns in Georgia: A Study of State and Civil Society Response*. PMC Research Center, https://www.pmcresearch.org/policypapers_file/f6ac5dfb34c12e31c.pdf

¹⁹⁸ <https://caucasusbarometer.org/en/cb2024ge/STLN1/>

¹⁹⁹ (2024). Culture in Flux: The Role of Culture in Strengthening Georgia's National Identity. 7.11.2024. <https://saisreview.sais.jhu.edu/culture-in-flux-the-role-of-culture-in-strengthening-georgias-national-identity/>

²⁰⁰ (2023). Youth Study Generation of Independent Georgia: In between hopes and uncertainties. Friedrich-Ebert-Stiftung South Caucasus. <https://library.fes.de/pdf-files/bueros/georgien/20609.pdf>

²⁰¹ (2023). Youth Study Generation of Independent Georgia: In between hopes and uncertainties. Friedrich-Ebert-Stiftung South Caucasus. <https://library.fes.de/pdf-files/bueros/georgien/20609.pdf>

²⁰² (2023). Youth Study Generation of Independent Georgia: In between hopes and uncertainties. Friedrich-Ebert-Stiftung South Caucasus. <https://library.fes.de/pdf-files/bueros/georgien/20609.pdf>

programmes and media partnerships, are gradually influencing public perceptions in favour of European identity.

According to the IRI poll, over 65 % of Moldovans consider Romania to be the most important partner. On the other side, Russia's influence persists through disinformation activities via social media and religious connections. Notably, the Church is at the top of the most trusted institutions in Moldova (64 %) according to the October 2024 BOP IPP poll²⁰³. In Moldova there are two orthodox churches, the Moldovan Church linked to the Russian Church and the Bessarabia Church linked to the Romanian Church. The February 2024 IDIS Viitorul-CBS AXA poll²⁰⁴ shows that 43.2 % support affiliation of the Moldovan Church under Russian canonical authority, while 32.4 % favour alignment with the Bessarabia Church under Romanian authority. This preference of Moldovans is likely influenced by Moldova's historical connections with both Russia and Romania.

In Ukraine, the attitudes to Russians and perception of cultural ties with Russia as well as perception of the USSR and Soviet past has been changing since 2014 and even more significantly since February 2022. Until 2014, Ukrainians sincerely trusted in the friendly intentions of their neighbours and wanted to build good relations with them. Even after 2014, most Ukrainians maintained a positive attitude towards 'ordinary Russians'. The full-scale aggression with its mass killings and widespread destruction forced most Ukrainians to revise their knowledge, experience, common practices, and their identities, particularly because the genocidal rhetoric of the Russian authorities has been supported by most of Russian society in either an open or a more passive form. Thus, the ties to Russia – cultural, historical, familial – have been if not totally severed then significantly weakened and critically re-evaluated and the possibilities for any reconciliation are seen as non-existent or very unlikely.

In June 2024, for example, 46.1 % of Ukrainians preferred the statement 'Ukrainians and Russians were brotherly nations before but not anymore', and another 43.6 % selected 'Ukrainians and Russians never were brotherly nations', while only 3 % opted for 'Ukrainians and Russians always were and remain brotherly nations'²⁰⁵. This is a significant shift from December 2017, when the most preferred option (49.6 %) was the statement 'Ukrainians and Russians always were and remain brotherly nations' ranked second with 27.2 %, and only 16 % denied any 'brotherhood' between the nations. Overall, Russia is associated with regression and underdevelopment (78 %)²⁰⁶. Moreover, in October 2024, 93 % of Ukrainians said that they had a negative/bad attitude towards Russia (93 %) and Russians (84 %)²⁰⁷.

²⁰³ Barometrul Opiniei Publice. Available at: <https://ipp.md/wp-content/uploads/2024/10/Raport-final-BOP-2024.pdf>

²⁰⁴ Sondaj socio-politic: Realizat de către CBX-AXA, la comanda IDIS „Viitorul” și a Fundației Universitare a Mării Negre. Available at: <http://viitorul.org/files/library/Studiu%20Omnibus%20IDIS%202024.02.28%20final.pdf>

²⁰⁵ Razumkov Centre. (2024). Ідентичність громадян України: тенденції змін (червень 2024р.). 24.07.2024. <https://razumkov.org.ua/napriamky/sotsiologichni-doslidzhennia/identychnist-gromadian-ukrainy-tendentsii-zmin-cherven-2024r>

²⁰⁶ Razumkov Centre. (2024). Ідентичність громадян України: тенденції змін (червень 2024р.). 24.07.2024. <https://razumkov.org.ua/napriamky/sotsiologichni-doslidzhennia/identychnist-gromadian-ukrainy-tendentsii-zmin-cherven-2024r>

²⁰⁷ Hrushetskyi A. (2024). Attitude of Ukrainians towards Russia and Russians. 07.11.2024. KIIS. <https://www.kiis.com.ua/?lang=eng&cat=reports&id=1446&page=1>

The attitudes to the Soviet past have never been overly positive in Ukraine, with people consistently answering that the collapse of the USSR was a positive thing and not a catastrophe, and even more so since 2014. For example, when asked to assess the justness of Soviet society and the current Ukrainian society (on the scale from 0 to 10 as the most just) in 2024 current Ukrainian society was perceived as more just compared to the Soviet (5.8 vs 3.2). To compare, in 2013 it was otherwise: Soviet (6.2) and Ukrainian (4.0)²⁰⁸.

In June 2024, when asked whether Ukraine is a European country, the majority answered affirmatively when talking in a cultural (55.1 %), historical (68.7 %), and geographical (84.8 %) sense²⁰⁹. Nearly half of Ukrainians (49.1 %) feel themselves to be Europeans, with 45.1 % feeling otherwise. Those who do not feel themselves to be Europeans mention 'low level of [material/economic] well-being' (75.4 %), 'sociocultural conditions of life' (40.6 %), and 'language barriers' (38 %) as the main reasons for that and only 23 % mentioned 'belonging to the different culture' (respondents could choose several answers for this question)²¹⁰.

Regarding cultural consumption, there is a normative disposition to cut down and curtail the consumption of Russian films, series, music, literature, TV shows, etc. that is strongly present in public and media discourses and supported by the majority of the population. Still, it is important to note that the actual cultural consumption of these kinds still occurs as the normative disposition is not always followed in actual practices. Over the past ten years Turkish and Chinese TV series have also become rather popular, particularly in some genres.

The question of religious autonomy and independence had been especially important in Ukraine, taking into account the number of different Orthodox churches that have existed since at least 1991 and their debates about canonical status and relationship of some of them to Russia, and particularly to the Russian Orthodox Church (ROC). Historically, Russia had been weaponising the religions sphere and using the ROC with its division - the Ukrainian Orthodox Church (of Moscow Patriarchy) as its agent of influence and leverage in political, cultural, and even socioeconomic spheres in Ukraine. Since 2000 and particularly since 2008, this has been noticeable in the promotion by the ROC of the 'Russian-Ukrainian brotherhoods', 'Slavic brotherhood', 'traditional values' and 'the Russian World' (Russkiy Mir) as a civilizational choice in opposition to 'the West' and 'European values and decadent lifestyles'. In 2008, the 'Russian World' concept was incorporated into the Russian foreign policy doctrine.

Since 2014, the Ukrainian Orthodox Church (of Moscow Patriarchy) has been used as an instrument in Russia's aggression against Ukraine. Thus, the question of religious independence from Russia re-actualised, particularly considering the importance and high place of the Church as an institution for Ukrainians. In 2018, the Orthodox Church of Ukraine (OCU), newly formed mainly on the bases of two Orthodox churches

²⁰⁸ Razumkov Centre. (2024). Ідентичність громадян України: тенденції змін (червень 2024р.). 24.07.2024. <https://razumkov.org.ua/napriamky/sotsiologichni-doslidzhennia/identychnist-gromadian-ukrainy-tendentsii-zmin-cherven-2024r>

²⁰⁹ Razumkov Centre. (2024). Ідентичність громадян України: тенденції змін (червень 2024р.). 24.07.2024. <https://razumkov.org.ua/napriamky/sotsiologichni-doslidzhennia/identychnist-gromadian-ukrainy-tendentsii-zmin-cherven-2024r>

²¹⁰ Razumkov Centre. (2024). Ідентичність громадян України: тенденції змін (червень 2024р.). 24.07.2024. <https://razumkov.org.ua/napriamky/sotsiologichni-doslidzhennia/identychnist-gromadian-ukrainy-tendentsii-zmin-cherven-2024r>

independent from Moscow Patriarchy (ROC), received the Thomos from the Ecumenical Patriarch in recognition of its canonical status.

Since 2022 and considering that the Russian Orthodox Church supported the aggression against Ukraine²¹¹, some members and leaders of the Ukrainian Orthodox Church (of Moscow Patriarchy) have been distancing themselves from the ROC. Still, the issue continued to be problematic. During 2023 and 2024, the Ukrainian state was trying to prevent the ROC-affiliated structures from operating in Ukraine and pressure the UOC(MP) into severing ties with Moscow completely. Such a policy is supported by most Ukrainians: 63 % of Ukrainians are for the total prohibition of the UOC(MP), while another 20 % think that the state should heavily oversee and control the UOC(MP)'s activities and its representatives/members²¹².

3.2.4. Perception of the relationship of external actors with one another

Existing surveys show that, to a large extent, Georgian citizens regard cooperation with the EU and Russia as mutually exclusive²¹³. When asked whether they would still support EU accession if this entailed cutting ties with Russia, 17 % would change their views (8 % strongly and 9 % somewhat), whereas 74 % would still support membership in the EU (55 % strongly and 19 % somewhat).

Other surveys point to a strong preference in favour of joining the EU and NATO over dropping accession to these organisations for improving relations with Russia instead²¹⁴. This is because membership in the EU and NATO is associated with stronger benefits for Georgia.

Therefore, recent surveys do not reflect the Georgian authorities' ambiguous narrative about the need to placate – or at least, not to upset – Russia while pursuing the course of Euro-Atlantic integration.

The EU, the US, Russia, and neighbouring Romania and Ukraine are among the key external actors that play different roles in influencing Moldova's domestic and foreign policy process. It is to be noted that the IRI poll from July 2024 shows the EU and Romania are seen as the most critical partners, with 65 % of respondents identifying each as the most important partner. This likely reflects Moldova's EU integration aspirations and its cultural and historical ties with Romania, which is both a neighbouring country and a key advocate for Moldova's EU membership.

Meanwhile, attitudes towards Russia (50 %) and Ukraine (46 %) reveal ambivalence, which may stem from the challenging geopolitical environment, made more brutal by Russia's ongoing war in Ukraine. Despite the continued development and political support from the US to Moldova, comparable with the one provided by

²¹¹ https://tsargrad.tv/articles/vosem-let-idut-popytki-unichtozhit-donbass-patriarh-kirill-podderzhal-specoperaciju-na-ukraine_507339, Павлова А. (2022) Войну благословил. Как церковные иерархи отреагировали на речь патриарха Кирилла, поддержавшего вторжение России в Украину. 22.03.202. Медиазона. <https://zona.media/article/2022/03/22/patriarch>

²¹² Hrushetskyi, A. (2024). What should be the government's policy and trust in the Ukrainian Orthodox Church (Moscow Patriarchate). KIIS. <https://www.kiis.com.ua/?lang=eng&cat=reports&id=1404&page=8>

²¹³ IRI. (2023). "Georgian Survey of Public Opinion: September-October 2023". Available at: <https://www.iri.org/resources/georgian-survey-of-public-opinion-september-october-2023/> on 7 October 2024.

²¹⁴ NDI (2023) 'Taking Georgians' pulse'. Retrieved from: https://civil.ge/wp-content/uploads/2023/05/NDI-Georgia_March-2023-telephone-poll_Eng_PUBLIC-VERSION_FINAL_03.05.pdf

the EU, the respondents of the IRI poll consider the US as important as Turkey (42 %). While China (35 %) indicates limited perceived relevance to Moldova's immediate needs and political goals.

Even if China has an economic presence in Moldova, it is not viewed as a significant actor actively opposing Moldova's EU integration. Turkey, on the other hand, plays a geopolitical role in the broader Black Sea area, but does not appear to actively influence Moldova's European integration. However, Turkey's involvement in the Gagauzia region is notable, as it counterbalances Russia's influence through aid, investments, and close ties with regional leaders. Turkey's role has been crucial in preventing Russia's attempts to destabilise the region by discouraging separatist movements or geopolitical confrontations with the Moldovan government.

Moldovan citizens' perceptions of the relationships between major external actors reflect awareness of alliances and rivalries. The EU-US partnership is generally seen as beneficial for Moldova's sovereignty and regional stability, while the EU-Russia relationship is perceived as competitive and often tense. This dynamic influences Moldova's internal discourse on national security and foreign policy orientation. Surveys suggest that citizens are wary of being caught in great-power rivalries, favouring a balanced foreign policy that can leverage Moldova's strategic location.

The perception of actors outside the EU by Ukrainians is influenced by the position of a particular country regarding the Russo-Ukrainian war. As expected, Ukrainians have positive attitudes towards those countries that support Ukraine and negative to those that support Russia or declare a neutral position. Among the external actors, the UK is perceived in the most positive way: the ratio between the positive and negative attitudes is 80.6²¹⁵. This is to be expected because the UK has had a hawkish stance since the beginning of the full-scale invasion, pushed the EU Member State leaders to intensify support for Ukraine, and is the third largest individual provider of military assistance to the Ukrainian Armed Forces²¹⁶. For Canada and the US, ratios are 77 and 73.6 respectively, which means there are many more Ukrainians in favour of these countries than the opposite²¹⁷. However, although 78 % of Ukrainians consider the US a reliable ally²¹⁸, in September-October 2024, amidst the US presidential electoral campaign, local experts defined the 'intensification of electoral struggle in the USA and the uncertainty of Washington's future foreign policy course' as the second most important negative external factor for Ukraine²¹⁹.

²¹⁵ Razumkov Centre. (2024). Citizen support for Ukraine's accession to the European Union and NATO. Attitude towards foreign countries. Attitude towards peace negotiations. <https://razumkov.org.ua/napriamky/sotsiologichni-doslidzhennia/pidtrymka-gromadianamy-vstupu-ukrainy-do-yevropeiskogo-soiuzu-ta-nato-stavlennia-do-inozemnykh-derzhav-stavlennia-do-myrynykh-peregovoriv-veresen-2024r>

²¹⁶ Total bilateral aid allocations to Ukraine between January 24, 2022 and June 30, 2024, by donor and type. Available at: <https://www.statista.com/statistics/1303432/total-bilateral-aid-to-ukraine/>

²¹⁷ Razumkov Centre. (2024). Citizen support for Ukraine's accession to the European Union and NATO. Attitude towards foreign countries. Attitude towards peace negotiations. <https://razumkov.org.ua/napriamky/sotsiologichni-doslidzhennia/pidtrymka-gromadianamy-vstupu-ukrainy-do-yevropeiskogo-soiuzu-ta-nato-stavlennia-do-inozemnykh-derzhav-stavlennia-do-myrynykh-peregovoriv-veresen-2024r>

²¹⁸ The meaning of sovereignty: Ukrainian and European views of Russia's war on Ukraine. Available at: <https://ecfr.eu/publication/the-meaning-of-sovereignty-ukrainian-and-european-views-of-russias-war-on-ukraine/>

²¹⁹ Зовнішня політика України: стан, тенденції, перспективи (вересень–жовтень 2024р.) Available at: <https://razumkov.org.ua/napriamky/sotsiologichni-doslidzhennia/zovnishnia-polityka-ukrainy-stan-tendentsii-perspektyvy>

Among other European Neighbourhood countries, the most positive attitude is towards Moldova (ratio: 61.1). The clear pro-European course, as well as a simultaneous attempt to move away from Russia, form a positive image of Moldova. Attitudes towards Georgia are slightly more negative (ratio: 43.8), which is still a good result for Georgia considering its government's pro-Russian and anti-democratic shift. In September 2024, during the parliamentary election campaign in Georgia, the fact that the ruling party of the Georgian Dream used photos of the Ukrainian cities destroyed by Russia in its advertisement was actively discussed in the Ukrainian media and condemned by the Ministry of Foreign Affairs (MFA)²²⁰. Armenia and Azerbaijan's ratios are 25.2 and 20 respectively, with Azerbaijan as the only European Neighbourhood country to which the positive attitude does not exceed 50 %²²¹.

Turkey – with its attempt to keep a neutral position and cooperate simultaneously with its NATO allies and Ukraine, from the one side, and Russia and BRICS, from the other – is favoured by 55 % of Ukrainians. Its ratio between the positive and negative attitudes is 25.5²²². While only 12.4 % of Ukrainians believe that Turkey could be a mediator in the Russia-Ukraine peace negotiations²²³, cooperation in the military sphere is perceived as positive. A prominent example is a Turkish remotely piloted vehicle Bayraktar, which became iconic during the initial period of Russia's full-scale invasion and is mentioned in songs and even toponyms.

Only 16 % of Ukrainians treat China positively, while 73.2 % see it negatively (ratio: 57.2)²²⁴. The level of trust in China can be estimated through the number of respondents who consider China as a possible mediator in the peace negotiations: only 7.5 % of Ukrainians support such an idea²²⁵. China's Peace Plan was not appreciated by Ukrainian society, and President Zelensky called it 'destructive'²²⁶. Similar attitudes prevail towards other BRICS members put into the survey (RSA, India, Iran), with only Brazil having a low but still positive ratio of 12.5²²⁷.

²²⁰ statement of the MFA regarding the advertising banners of the ruling party of Georgia "Georgian Dream". Available at: <https://mfa.gov.ua/en/news/zayava-mzs-shchodo-reklamnih-baneriv-partiyi-vladi-gruziyi-gruzinska-mriya>

²²¹ Razumkov Centre. (2024). Citizen support for Ukraine's accession to the European Union and NATO. Attitude towards foreign countries. Attitude towards peace negotiations. <https://razumkov.org.ua/napriamky/sotsiologichni-doslidzhennia/pidtrymka-gromadianamy-vstupu-ukrainy-do-yevropeiskogo-soiuzu-ta-nato-stavlennia-do-inozemnykh-derzhav-stavlennia-do-myrynykh-peregovoriv-veresen-2024r>

²²² Ibid.

²²³ Аналітичний звіт за підсумками опитування «Війна, мир, перемога, майбутнє». Available at: <https://www.oporaua.org/viyna/analitichnii-zvit-za-pidsumkami-opituvannia-viina-mir-peremoga-maibutnie-24828>

²²⁴ Razumkov Centre. (2024). Citizen support for Ukraine's accession to the European Union and NATO. Attitude towards foreign countries. Attitude towards peace negotiations. <https://razumkov.org.ua/napriamky/sotsiologichni-doslidzhennia/pidtrymka-gromadianamy-vstupu-ukrainy-do-yevropeiskogo-soiuzu-ta-nato-stavlennia-do-inozemnykh-derzhav-stavlennia-do-myrynykh-peregovoriv-veresen-2024r>

²²⁵ Аналітичний звіт за підсумками опитування «Війна, мир, перемога, майбутнє». Available at: <https://www.oporaua.org/viyna/analitichnii-zvit-za-pidsumkami-opituvannia-viina-mir-peremoga-maibutnie-24828>

²²⁶ Fornusek, M. (2024, September 12). 'You either support war or you don't' — Zelensky blasts China-Brazil 'destructive' peace initiative. The Kyiv Independent. <https://kyivindependent.com/zelensky-on-china-brazil-plan/>

²²⁷ Razumkov Centre. (2024). Citizen support for Ukraine's accession to the European Union and NATO. Attitude towards foreign countries. Attitude towards peace negotiations. <https://razumkov.org.ua/napriamky/sotsiologichni-doslidzhennia/pidtrymka-gromadianamy-vstupu-ukrainy-do-yevropeiskogo-soiuzu-ta-nato-stavlennia-do-inozemnykh-derzhav-stavlennia-do-myrynykh-peregovoriv-veresen-2024r>

Russia heads the anti-rating: 94.3 % of Ukrainians consider Russia in either a ‘rather negative’ or ‘completely negative’ way (ratio: 91.4)²²⁸. After the full-scale invasion the attitudes towards Russia became so antagonistic that 78.5 % support ‘the complete severing of all relations with the Russian Federation up to a complete ban on the entry of Russian citizens into Ukraine’²²⁹ and the first associations with Russia are ‘aggressor’, ‘enemy’, and ‘hate’²³⁰.

3.2.5. Security issues

Russian military aggression and propaganda are considered the top threats to Georgia’s national security²³¹. Every second Georgian believes that EU and NATO membership would be best for the country’s security²³². However, there has been a slight decrease in support for NATO membership, particularly among young citizens and opposition supporters. When faced with a choice, the majority of Georgians would prefer EU-NATO membership over close cooperation with Russia²³³.

Russia is identified as the main security threat by the majority of Georgian citizens; however, the nature of this threat is multifaceted and differs among respondents. In addition to longstanding threats, Russia’s full-scale invasion of Ukraine has triggered new threat perceptions. 27 % of Georgian citizens fear a fate similar to that of Ukraine and regard the risk of a Russian aggression against their country as the main security threat, while 5 % mention the influx of Russian citizens to Georgia, which has substantially increased since the war broke out. A smaller share of respondents identifies longstanding or structural issues as key security threats, for example 13 % mention the Russian occupation of Abkhazia and South Ossetia, and 3 % economic dependency on Russia. Another 11 % cite Russian propaganda as they key danger for Georgia²³⁴.

Membership in Euro-Atlantic organisations - in the EU (29 %) and, to a lesser extent, in NATO (20 %) - is largely regarded as the key instrument to bolster Georgia’s national security. By contrast, 9 % of respondents argue in favour of Georgia’s strengthening its defence capabilities and an equal share stresses the need for a strong domestic leadership, while a mere 3 % advocate for a po-Russian orientation^{235,236}.

²²⁸ Ibid.

²²⁹ Ibid.

²³⁰ Hrushetskyi, A. (2024). How do Ukrainians see relations between Ukraine and Russia and what associations do Ukrainians have with Russia and ordinary Russians. Kyiv International Institute of Sociology. <https://kiis.com.ua/?lang=eng&cat=reports&id=1420&page=1>

²³¹ NDI. (2023). “Taking Georgians’ pulse Findings from October-November 2023 face to face survey”. Retrieved here: <https://www.ndi.org/publications/ndi-poll-georgian-citizens-remain-committed-eu-membership-nation-united-its-dreams-and> on 29 October 2024." P. 81.

²³² Ibid. P. 82.

²³³ Ibid. P. 94.

²³⁴ The Caucasus Research Resource Centers. (2023) "NDI: Public attitudes in Georgia, October 2023". Retrieved through ODA - <https://caucasusbarometer.org/en/no2023ge/TOPTHREA19/> on 7 October 2024.

²³⁵ IRI. (2023). “Georgian Survey of Public Opinion: September-October.

²³⁶ The Caucasus Research Resource Centers. (2023) "NDI: Public attitudes in Georgia, October 2023". Retrieved through ODA <https://caucasusbarometer.org/en/no2023ge/TOPSECUR19/> on 7 October 2024

Such data dovetails with perceptions of key allies for political cooperation. While NATO is mentioned by only 17 % of respondents (as opposed to 68 % not mentioning it), 60 % of Georgian citizens identify the EU as the country/organisation with which their country should have the closest political cooperation (as opposed to 25 % not mentioning it). Russia, Turkey and China are identified as such by only 20 %, 13 % and 2 % of respondents respectively²³⁷.

In Moldova, too, security is a pressing issue, especially in the light of the ongoing war in Ukraine, amplified by the unsolved Transnistrian conflict increasing security risks. While not being under immediate threat from Russia's military aggression, Moldova is experiencing unprecedented hybrid attacks from Russia. The new 2023 Moldova's National Security Strategy²³⁸ identifies Russia as the primary source of a wide range of hybrid threats. Russia's hybrid warfare continues to be a significant threat to Moldova's EU accession process, with disinformation campaigns, propaganda, and political manipulation intensifying. These campaigns raise doubts about the benefits of EU integration, amplifying fears of losing national identity and sovereignty. The Kremlin seeks to undermine Moldova's democratic institutions and influence public opinion against EU integration by supporting pro-Russian political actors. This has been visible in the context of the 2024 EU Referendum and presidential elections in Moldova.

A comparative analysis of the 2024 and 2023 IPRE polls on Moldovans' perceptions of national security solutions reveals a consistent preference for neutrality, though with slight variations in priorities. In both years, the most popular choice is neutrality without significant investment in military capabilities, chosen by 30.6 % in 2024 and 33.2 % in 2023. This reflects a strong, stable inclination towards non-alignment and staying out of military alliances or regional conflicts. Neutrality with increased defence investment ranks similarly in both years (18.6 % in 2024 and 18.3 % in 2023), indicating steady support for a strategy that enhances self-defence without committing to alliances. Together, these findings underscore Moldovans' cautious stance on military engagement, showing a preference for safeguarding neutrality while maintaining some defence capability.

EU accession is viewed by Moldovan citizens as bringing geopolitical stability, especially in light of Russian aggression in the region. The IPRE poll shows a slight increase in 2024, with 19.2 % support compared to 17.5 % in 2023. This indicates that a growing segment of the population sees European integration as a means of ensuring Moldova's stability, likely through economic and political, rather than military, alignment. The preference for unification with Romania (8.6 % in 2024 versus 8 % in 2023) and NATO membership (7.2 % in 2024 versus 7.5 % in 2023) remains low, with little change, suggesting that deeper Western military integration has limited appeal.

At the same time, according to the IRI polls conducted in Moldova between 2021 and 2024, support for NATO membership has remained relatively low, though it has shown a slight increase. In September-November 2021, 21 % of Moldovans said they would vote in favour of joining NATO if a referendum were held. The most

²³⁷ The Caucasus Research Resource Centers. (2023) "NDI: Public attitudes in Georgia, October 2023". Retrieved through ODA - > <https://caucasusbarometer.org/en/no2023ge/GEPOLEU/> on 7 October 2024

²³⁸ National Security Strategy, adopted by the Parliament of the Republic of Moldova in November 2023, available in EN: https://presedinte.md/app/webroot/uploaded/Proiect%20SSN_2023_En.pdf

recent IRI poll from February 2023 showed that 26 % of Moldovans would vote in favour of NATO membership in a referendum. This represents a five point increase in support compared to the 2021 poll. However, opposition to NATO membership remains high. The February 2023 poll found that 62 % of Moldovans would vote against joining NATO. It's important to note that Moldova is constitutionally neutral and does not have an official commitment to join NATO, unlike some of its neighbours. Public opinion in Moldova has generally been more favourable towards EU integration rather than NATO membership.

For Ukrainians, the main security challenge is Russia's full-scale invasion of Ukraine. Thus, all security issues are considered in terms of the war and potential victory. The overwhelming majority (88 %) of Ukrainians believe that Ukraine will win the war²³⁹. While 64 % suggest that the war will end in one to two years or less²⁴⁰, almost the same number (63 %) claim that they are ready to endure the war as long as necessary²⁴¹.

The question of duration of the war is closely connected to the issue of potential negotiations with Russia. When asked about the possibility of such negotiations, only 35 % consider negotiations an effective way that should be used now to achieve peace²⁴². At the same time, 37 % support the idea that negotiations with Russia should be conducted only after its troops have been pushed back (withdrawn) to the demarcation line as of 23 February 2022, and 49 % only after its troops have been pushed back to the 1991 borders²⁴³. The vast majority of Ukrainians did not believe that Russia would be entering any negotiations with fair intentions.

In March 2024, 91 % were sure that Russia's motive to enter the negotiations is to take time to prepare for a new attack. 68 % are sure that there is a high probability of Russia attacking Ukraine again if there is a signed peace treaty, and another 18 % estimate such probability as medium. Finally, 55 % think that Russia won't accept Ukraine's terms at all in negotiations to end the war²⁴⁴.

Among the activities/things that are necessary for better defence of Ukraine and depend on international partners, 69 % of Ukrainians prioritise 'Ukraine's allies sending it more weapons and ammunition' over all other options²⁴⁵. The second most popular option – Ukraine's accession to NATO – has almost half the support

²³⁹ NATIONAL SURVEY OF UKRAINE. Available at: https://ratinggroup.ua/files/ratinggroup/reg_files/ukr-24-ns-02-eng.pdf

²⁴⁰ NATIONAL SURVEY OF UKRAINE. Available at: https://ratinggroup.ua/files/ratinggroup/reg_files/ukr-24-ns-02-eng.pdf

²⁴¹ Perception of Russia's safety margin and how long Ukrainians are willing to bear the burden of war. Available at: <https://www.kiis.com.ua/?lang=eng&cat=reports&id=1445&page=1>

²⁴² Підтримка громадянами вступу України до Європейського Союзу та НАТО. Ставлення до іноземних держав. Ставлення до мирних переговорів (вересень 2024р.) Available at: <https://razumkov.org.ua/napriamky/sotsiologichni-doslidzhennia/pidtrymka-gromadianamy-vstupu-ukrainy-do-yevropeiskogo-soiuzu-ta-nato-stavlennia-do-inozemnykh-derzhav-stavlennia-do-myrnykh-peregovoriv-veresen-2024r>

²⁴³ Підтримка громадянами вступу України до Європейського Союзу та НАТО. Ставлення до іноземних держав. Ставлення до мирних переговорів (вересень 2024р.). Available at: <https://razumkov.org.ua/napriamky/sotsiologichni-doslidzhennia/pidtrymka-gromadianamy-vstupu-ukrainy-do-yevropeiskogo-soiuzu-ta-nato-stavlennia-do-inozemnykh-derzhav-stavlennia-do-myrnykh-peregovoriv-veresen-2024r>

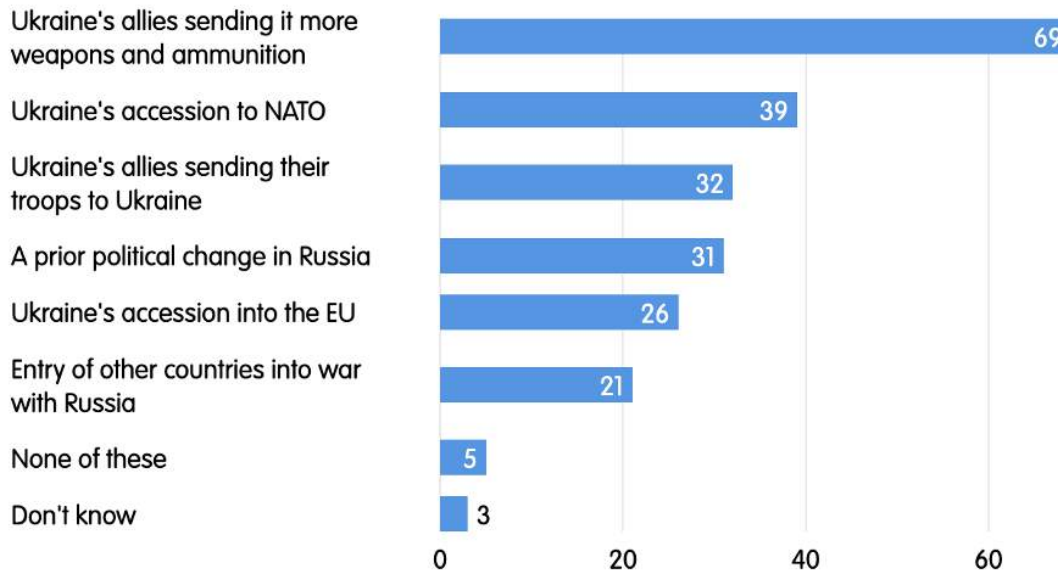
²⁴⁴ Carnegie Endowment for International Peace and SG Rating. (2024) Social expectations regarding the end of war: First wave. https://carnegie-production-assets.s3.amazonaws.com/static/files/Carnegie_survey_Ukraine_war_Ukrainian_public_opinion_March_2024.pdf. Slide 11.

²⁴⁵ The meaning of sovereignty: Ukrainian and European views of Russia's war on Ukraine. Available at: <https://ecfr.eu/publication/the-meaning-of-sovereignty-ukrainian-and-european-views-of-russias-war-on-ukraine/>

– 39 %. Notably, most Ukrainians are quite realistic regarding the possibility of sending allies’ troops to Ukraine: only a third considers this step a prerequisite for better defence.

Ukrainians’ views on what their country needs to defend itself.

In per cent.



Respondents could choose all that apply.

Source: Survey conducted in May 2024 by Datapraxix and Rating Group in Ukraine. · Get the data
ECFR · ecf.eu

Heavily relying on the international allies’ support, 54 % of Ukrainians believe that the West continues to provide serious assistance to Ukraine as much as possible and wants the war to end on terms acceptable to Ukraine²⁴⁶. At the same time, a significant number of Ukrainians (38 %) think the opposite: the West is getting tired of Ukraine and wants to put pressure on Ukraine to make concessions to Russia.

As mentioned above, almost 40 % of Ukrainians believe that Ukraine needs accession to NATO for better defence. At the same time, a significant number of Ukrainians support the idea of Ukraine’s membership in NATO per se: if a referendum on this question were held soon, 86 % of those who intend to participate in such a referendum would vote in favour²⁴⁷. Though NATO membership is essential, 71 % are not ready for

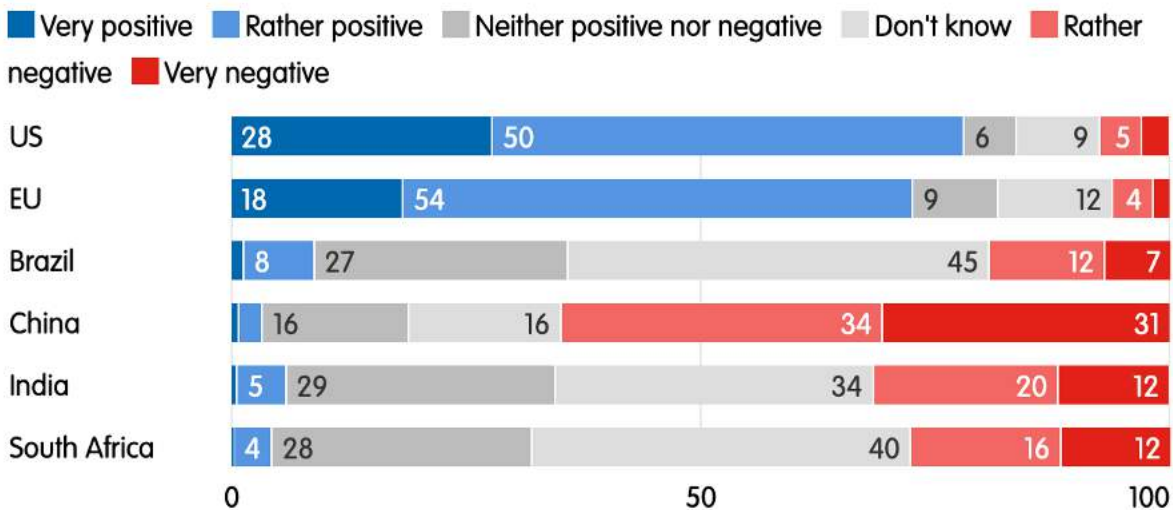
²⁴⁶ Is Ukraine able to achieve success and acceptance of Western policies with the support of the West? Available at: <https://www.kiis.com.ua/?lang=eng&cat=reports&id=1438&page=2>

²⁴⁷ Підтримка громадянами вступу України до Європейського Союзу та НАТО. Ставлення до іноземних держав. Ставлення до мирних переговорів (вересень 2024р.). Available at: <https://razumkov.org.ua/napriamky/sotsiologichni-doslidzhennia/pidtrymka-gromadianamy-vstupu-ukrainy-do-yevropeiskogo-soiuzu-ta-nato-stavlennia-do-inozemnykh-derzhav-stavlennia-do-myrnykh-peregovoriv-veresen-2024r>

potential territorial concessions even in exchange for NATO membership²⁴⁸. At the same time, 64 % consider both the EU and NATO equally important for the future of Ukraine²⁴⁹.

The assessment of the external actors’ role in the war follows the general trends in perception of external actors (or, probably, vice versa: general perception depicts the role-in-war assessment). The role of critical Western allies – the US and the EU – that provide most of the military and financial aid is perceived as positive. The role of those countries that in any way support Russia – Brazil, China, India, South Africa – is considered negative. Notably, despite the US’ positive role, as many Ukrainians (47%) are concerned that the US will negotiate for a peace deal with Russia without involving the Ukrainian government as are not (49 %) ²⁵⁰, which means that Ukrainians are still afraid that ‘big powers’ can define Ukraine’s future, ignoring the position of Ukraine.

Ukraine: Would you say that each of the following has played a positive, or a negative, role in the war in Ukraine? In per cent.



Source: Survey conducted in May 2024 by Datapraxis, YouGov, Alpha Research, Norstat, and Rating Group in Bulgaria, the Czech Republic, Estonia, France, Germany, Great Britain, Greece, Italy, Poland, Portugal, the Netherlands, Spain, Sweden, Switzerland, and Ukraine. · Get the data
ECFR · ecf.eu

²⁴⁸ The meaning of sovereignty: Ukrainian and European views of Russia’s war on Ukraine. Available at: <https://ecfr.eu/publication/the-meaning-of-sovereignty-ukrainian-and-european-views-of-russias-war-on-ukraine/>

²⁴⁹ The meaning of sovereignty: Ukrainian and European views of Russia’s war on Ukraine. Available at: <https://ecfr.eu/publication/the-meaning-of-sovereignty-ukrainian-and-european-views-of-russias-war-on-ukraine/>

²⁵⁰ The meaning of sovereignty: Ukrainian and European views of Russia’s war on Ukraine. Available at: <https://ecfr.eu/publication/the-meaning-of-sovereignty-ukrainian-and-european-views-of-russias-war-on-ukraine/>

3.2.6. Social issues

A public opinion survey by the Caucasus Research Resource Centers (CRRC) indicates that a significant number of Georgian citizens hold conservative and nationalist views. Many citizens express strong attachment to traditional values, national identity, and the Georgian Orthodox Church. According to the 2019 Caucasus Barometer, there is widespread agreement that being Georgian is closely tied to being an Orthodox Christian and speaking the Georgian language as well as having Georgian ancestry²⁵¹.

The conservative views are also evident in attitudes towards minority groups, particularly the LGBTQ+ community. Public Opinion Surveys have consistently shown low levels of acceptance for sexual minorities in Georgia. For instance, according to the 2019 CRRC survey, 87 % of Georgians disapprove 'doing business with homosexual'²⁵². In recent years, attempts to hold Pride events in Tbilisi have been met with violent opposition from far-right groups and conservative activists, leading to clashes and highlighting deep societal divisions.

Citizens' attitudes toward democracy are overall positive. In the 2023 IRI Survey, 74 % of surveyed citizens believed that democracy was 'the best possible form of government for our country'²⁵³. Similarly, in the 2024 CRRC survey, 67 % of citizens agreed with the statement that 'Democracy is preferable to any other kind of government', and only 12 % said that 'In some circumstances a non-democratic government can be preferred'²⁵⁴.

The polls indicate significant differences in foreign policy preferences along ethnic and political lines in Georgia. Ethnic minorities, particularly in regions like Kvemo Kartli and Samtskhe-Javakheti, exhibit a more favourable stance towards Russia compared to the broader Georgian population, which largely supports EU integration. This divergence poses a challenge for national cohesion and may be instrumentalised by external hostile powers such as Russia.

Supporters of the ruling Georgian Dream party tend to prioritise economic stability and view closer ties with Russia as more beneficial for the country's development and security. In contrast, opposition supporters are more likely to advocate for a pro-Western orientation, emphasising the importance of EU and NATO membership.

This ideological split creates an environment where malign actors could exploit ethnic and political cleavages to further destabilise the country. Importantly, many citizens recognise that political leaders often manipulate these divisions for their own gain, undermining shared national interests. Addressing disinformation and fostering dialogue between different ethnic and political groups is essential for bridging these divides and promoting a unified national agenda.

External actors' involvement via development cooperation in Moldova's social issues, such as healthcare, education, and labour mobility, is overall well regarded by the Moldovan public. There is a preference for

²⁵¹ Caucasus Barometer 2019 Georgia Survey, CRRC Georgia. Available at: <https://caucasusbarometer.org/en/cb2019ge/TRGEORTH/>

²⁵² Caucasus Barometer 2019 Georgia Survey, CRRC Georgia. Available at: <https://caucasusbarometer.org/en/cb2019ge/BUSINGA/>

²⁵³ IRI. (2023). "Georgian Survey of Public Opinion: September-October 2023". Retrieved here: <https://www.iri.org/resources/georgian-survey-of-public-opinion-september-october-2023/> on 7 October 2024. P. 25.

²⁵⁴ Caucasus Barometer 2019 Georgia Survey, CRRC Georgia. Available at: <https://caucasusbarometer.org/en/cb-ge/ATTDEM/>

social development programmes that align with Moldova’s European aspirations. Public opinion varies significantly, with younger citizens generally more supportive of European social standards. The October 2024 BOP IPP poll²⁵⁵ highlights that creating more job opportunities is the most prioritised action for improving socioeconomic conditions, particularly for young people, and facilitating their integration into the labour market (20 % as the top choice). Combating corruption follows closely, with 16 % ranking it as the top priority, underscoring a strong public desire for transparency and accountability in governance. Additionally, Moldovans prioritise improving access to healthcare (8 %), indicating a need for systemic reforms in both governance and social services.

In terms of top source of information IPRE poll July 2024 shows that Moldovans primarily rely on online and traditional media sources. The internet is the most significant source, with 55.3 % of respondents indicating it as their primary channel, reflecting the widespread use of online platforms and the accessibility of information on the web. TV follows closely at 47.3 %, showing that traditional media remains highly influential, likely due to its broad reach and perceived reliability among various demographics. Social platforms are another key source, used by 28.3 % of respondents, which aligns with global trends where social media plays a critical role in disseminating information quickly and engaging users interactively. Interpersonal communication also contributes significantly, with 18.6 % receiving information through discussions with colleagues, friends, or neighbours, and 13.3 % through relatives working abroad, highlighting the impact of personal networks. Family discussions, radio, and thematic websites provide additional information sources, though to a lesser extent. Newspapers are less common at 4.9 %, reflecting a shift away from print media.

The full-scale invasion in 2022 strengthened the solidarity and social unity of Ukrainians as well as their political identity. In The Razumkov’s Centre’s nationwide representative survey in June 2024²⁵⁶, 91.4 % said they were proud to be Ukrainian citizens and 94.7 % of respondents identified themselves as Ukrainian by nation. At the same time, when asked to select their definition of a nation, most respondents (46.2 %) opted for a civic one: ‘Ukrainian nation includes all citizens of Ukraine regardless of their ethnicity, language of their communication, and national traditions they uphold in their everyday life and their children’s upbringing’. The second most popular definition (21.3 %) also emphasised civic nation though in a slightly less inclusive way: ‘It is all citizens of Ukraine regardless of their ethnic background who communicate in Ukrainian and uphold Ukrainian traditions in their everyday life and their children’s upbringing’. The majority of Ukrainians define themselves as Orthodox Christian (70 %) with 56 % opting for the Orthodox Church of Ukraine (OCU). Another 7 % are Greek Catholic Church, and 5 % belong to other Christian churches²⁵⁷. Only 12 % of Ukrainians say that they are atheists. It should be noted that these identifications are rather cultural as only about one third of those who define themselves as religious are engaged in regular religious practices and

²⁵⁵ Barometrul Opiniei Publice. Available at: <https://ipp.md/wp-content/uploads/2024/10/Raport-final-BOP-2024.pdf>

²⁵⁶ Razumkov Centre. (2024). Ідентичність громадян України: тенденції змін (червень 2024р.). 24.07.2024. <https://razumkov.org.ua/napriamky/sotsiologichni-doslidzhennia/identychnist-gromadian-ukrainy-tendentsii-zmin-cherven-2024r>

²⁵⁷ Hrushetskyi A. (2024). Religious self-identification of Ukrainians, attitude to the creation of a single Orthodox Church and the Law on the Prohibition of Certain Religious Organizations. KIIS. <https://www.kiis.com.ua/?lang=eng&cat=reports&id=1443&page=2>

services. Still, these national and religious identities are reflected in the list of the most beloved holidays: top three for Ukrainians are Easter, Christmas, and Independence Day²⁵⁸.

In December 2023, the Rating Group conducted a survey as part of the Institute Gallup International's 'End of Year 2023' project. 64 % of Ukrainians agreed with the statement 'Democracy may have its drawbacks, but it is the best system of governance', with 14 % both agreeing and disagreeing and another 16 % against it²⁵⁹. Even more, it ranks six among surveyed countries by the number of those who completely agree with this statement, with such European countries as Sweden, Austria, Germany, Spain, and Switzerland occupying the top five positions. Interestingly, in the same survey Moldova is within those who have the least level of support for defining democracy as the best form of governance among the surveyed countries. Also, Ukraine is among the top ten countries that supported the notion that their country is governed by the will of the people: 44 % agreed completely, and 17 % partially, with another 36 % disagreeing. It is worth noting that here Ukrainians are close in their replies to the people of Kosovo and of Serbia, while Moldova, Georgia, North Macedonia, and Bosnia and Herzegovina are among the countries with the least level of support for the notion that their state is governed by the will of the people²⁶⁰.

In a June 2024 survey, when asked to choose between two statements, most respondents (46.9 %) opted for 'Of course, the freedom and prosperity are important, but for my freedom and for the guarantees for civil rights I am ready to suffer certain material difficulties'²⁶¹. The opposite statement – that although freedom and prosperity are important, I would give up to the state certain part of my civil rights and freedoms for my material/economic well-being' was selected by 24 % (half as often). It is also important to note that this preference for freedom and civil rights over material and economic well-being has been consistent since at least 2010.

This corresponds to the fact that to the 93 % it is important that Ukraine becomes a fully functioning democracy²⁶². The support for democracy is not just dispositional and normative but also is reflected in everyday practices. For example, 75 % stated that they 'have either already provided their opinion to local or national authorities to inform their decision-making, or would do so if given the opportunity'²⁶³.

Gender equality and women's rights are important to Ukrainians. In the NDI and KIIS survey in March 2024, 74 % of Ukrainians said that equality between men and women is important to them personally, and only

²⁵⁸ Paniotto V. and Hrushetskyi A. (2024). Dynamic of the attitude of Ukrainians to Independence and the Independent Day Holiday (2013-2023). KIIS. <https://www.kiis.com.ua/?lang=eng&cat=reports&id=1427&page=3>

²⁵⁹ SG Rating. (2024). Level of Democracy: research by 'Rating' with Gallup International. 25.04.2024. <https://ratinggroup.ua/en/research/ukraine/riven-demokratiyi-doslidzhennya-rejtingu-z-gallup-international.html> ; https://ratinggroup.ua/files/ratinggroup/reg_files/25.04.24.pdf

²⁶⁰ https://ratinggroup.ua/files/ratinggroup/reg_files/25.04.24.pdf , Silde 2.

²⁶¹ Razumkov Centre. (2024). Ідентичність громадян України: тенденції змін (червень 2024р.). 24.07.2024. <https://razumkov.org.ua/napriamky/sotsiologichni-doslidzhennia/identychnist-gromadian-ukrainy-tendentsii-zmin-cherven-2024r>

²⁶² NDI. (2024). May 2024 Opportunities and Challenges Facing Ukraine's Democratic Transition. <https://www.ndi.org/sites/default/files/May%202024%20Opportunities%20and%20Challenges%20Facing%20Ukraine%E2%80%99s%20Democratic%20Transition%20%28English%29.pdf> . Slide 12.

²⁶³ NDI. (2024). As Costs of War Mount, Ukrainian Demands for Inclusive Democracy Remain Strong. <https://www.ndi.org/publications/costs-war-mount-ukrainian-demands-inclusive-democracy-remain-strong>

8 % remarked that it's not really so²⁶⁴. In 2023-2024 the attitudes toward LGBT+ people have continued to improve. In May 2024 in 'Nash Svit' and KIIS's survey, 70.4 % said that 'LGBT people should have the same rights as the rest of Ukrainian citizens' and more than a half (54.3 %) of Ukrainians had no objections to the introduction of registered civil partnership for the same-sex couples (without the right to joint adoption of children)²⁶⁵. Also, a majority (68.3 %) had a positive attitude to the participation of LGBT people in defending Ukraine, with only 7.1 % being negative about it. In an NDI survey in May 2024, 68 % insisted that LGBT+ people should be protected from discrimination and 71 % that the crimes against them should be duly considered and punished²⁶⁶.

Apart from strengthening the sense of common identity, the full-scale invasion also had a 'rallying around the flag' effect in improving institutional trust that is still present to some extent. In 2024, all law enforcement and national security institutions had a positive balance of social trust (the difference in answers of trust and distrust), with the Army (AFU) maintaining a strong lead over all other institutions (+85.6) and closely followed by the State Rescue and Emergency Service (DSNS) with (+70.7). Apart from other law enforcement institutions, there were strong positive balances for: volunteers (+66.6), civil society organisations (+29.5), and Church (+35.7)²⁶⁷. Regarding the elections, there is a consensus that they should only be held after the war: 72 % are in favour of that with only 24 % saying that they could be held before²⁶⁸.

Social cohesion of Ukrainian society and institutional trust, particularly the social trust in politicians, the President, the government, and the Parliament are often the aims of the disinformation and misinformation operations by Russia and its proxies. In September 2024, the majority of Ukrainians (71 %) recognised the spread of Russian disinformation and propaganda in social networks as a serious threat²⁶⁹. Overall, the spread of fakes and disinformation of any kind and origin considered to be a serious problem by 89 % of respondents²⁷⁰. Social media (53 %) and messengers (35 %) and television (32 %) are seen as the main sources for the fakes and disinformation. Still, according to the same survey on behalf of EUAM, in September

²⁶⁴ NDI. (2024). NDI 2024 Survey: Ensuring Equal Rights and Opportunities for Women and Men in Ukrainian Society. 10 September 2024. <https://www.ndi.org/publications/ndi-2024-survey-ensuring-equal-rights-and-opportunities-women-and-men-ukrainian-society> ; <https://www.ndi.org/sites/default/files/Gender%20survey%202024%20ENG%20-%20for%20NDI%20portal.pdf> Slide 6.

²⁶⁵ NGO "Nash Svit". (2024). Press releases and reports Perception of the LGBT people and their right in Ukraine (May-June 2024). KIIS and NGO "Nash Svit". <https://www.kiis.com.ua/?lang=eng&cat=reports&id=1417&page=5>

²⁶⁶ NDI. (2024). May 2024 Opportunities and Challenges Facing Ukraine's Democratic Transition. <https://www.ndi.org/sites/default/files/May%202024%20Opportunities%20and%20Challenges%20Facing%20Ukraine%E2%80%99s%20Democratic%20Transition%20%28English%29.pdf> . Slide 13.

²⁶⁷ Razumkov Centre. (2024). Оцінка ситуації в країні та діяльності влади, довіра до соціальних інститутів, політиків, посадовців та громадських діячів, віра в перемогу (вересень 2024р.). 15.10.2024. <https://razumkov.org.ua/napriamky/sotsiologichni-doslidzhennia/otsinka-sytuatsii-v-kraini-ta-diiialnosti-vlady-dovira-do-sotsialnykh-instytutiv-politykiv-posadovtsiv-ta-gromadskykh-diiachiv-vira-v-peremogu-veresen-2024r>

²⁶⁸ NDI. (2024). May 2024 Opportunities and Challenges Facing Ukraine's Democratic Transition. <https://www.ndi.org/sites/default/files/May%202024%20Opportunities%20and%20Challenges%20Facing%20Ukraine%E2%80%99s%20Democratic%20Transition%20%28English%29.pdf> . Slide 28.

²⁶⁹ Hrushetskyi A. (2024). Ukrainians' perception of the threat of the spread of Russian propaganda in social networks and their attitude towards the Telegram ban. 09.09.2024. KIIS. <https://www.kiis.com.ua/?lang=eng&cat=reports&id=1428&page=3>

²⁷⁰ Sociological Group Rating. (2024). Success or not? How Ukrainians assess law enforcement reforms and the EU's support. 28 October 2024. <https://ratinggroup.ua/en/research/ukraine/uspiln-chi-ni-yak-ukrayinci-ocinyuyut-reformuvannya-organiv-pravoporyadku-ta-pidtrimku-yes.html>

2024 Telegram was the most popular source of information (47 %), followed by YouTube (26 %), and the United Marathon on TV (21 %) ²⁷¹.

3.3. Threats and opportunities

Our analysis of the data from surveys in Georgia, Moldova, and Ukraine reveals the following threats and opportunities in the region.

3.3.1. Threats

Russian military aggression against Ukraine

Although Ukraine, with support of its Western allies, is fighting back against Russia and its backers North Korea, Iran and China, the current level of joint support of the West is insufficient to win the war. All scenarios other than the restoration of Ukraine's control over the whole of its internationally recognised territory would lead to the 'stable instability' both in Eastern Europe and in the Black Sea region. Ukraine's defeat would pose a direct security threat for bordering EU Member States as well as for Moldova and Georgia. Also, the political consequences of the defeat or even temporary concessions of Ukraine would include the strengthening of Russia's role in the region and would open the window of opportunities for those countries which oppose the West and would be perceived as the defeat of 'the West'.

Hybrid threats (propaganda, cyberattacks, etc)

Since Russia's military capacities are focused on Ukraine and the political landscape in Moldova, Georgia and Ukraine are still vulnerable to Russian influence, Russia can use hybrid tactics – from disinformation and propaganda to interference in electoral processes and cyberattacks – to destabilise these countries. While in Ukraine, where the overwhelming majority of the population support the integration to the EU and NATO and there are no illusions regarding Russia's intentions, Russian hybrid attacks primarily target the social issues related to the war. In Moldova and Georgia, where a significant number of citizens are hesitant regarding the future geopolitical course of the country, Russia exploits the issues of national sovereignty and alleged threats to 'traditional values' as well as tarnishing pro-European politicians or protesters.

Pro-Russian sentiment of a significant part of the population in Georgia and Moldova

Parliamentary elections in Georgia and presidential elections and referendum on the EU membership in Moldova showed that a significant number of citizens support those political parties or candidates who promote more intensive relations with Russia while criticising the European Union, European values, democracies and so on. Thus, the European future of these countries is not inevitable, and more efforts should be made both locally and from the EU side to make EU membership a preferable option. The hindering of these countries' EU integration and democratisation also pose a threat to the EU itself as well as to Ukraine

²⁷¹ Sociological Group Rating. (2024). Success or not? How Ukrainians assess law enforcement reforms and the EU's support. 28 October 2024. <https://ratinggroup.ua/en/research/ukraine/usprih-chi-ni-yak-ukrayinci-ocinyuyut-reformuvannya-organiv-pravoporyadku-ta-pidtrimku-yes.html>

as it undermines security in the region and strengthens Russia's influence and presence (including military) there.

Corruption and economic ties with Russia that could be exploited and thus become geopolitical and security threats

Corruption is seen as one of the main (if not the main) problem to be overcome in all three countries. Anti-corruption reforms and policies are also seen as very important, currently not really effective and thus in need of support from the EU, the US and so on. But corruption also presents a threat in the current geopolitical context. Also, as evidenced, Moldova and Georgia still have rather strong economic and business ties with Russia. Although currently the situation in Ukraine is different, before 2022 such ties had also been significant. Thus, current or previous economic and business ties with Russia and Russian capitals, as well as ties formed or exploited through corruption, could be used as leverage to influence these countries' politicians, political parties and social movements, media, governments and their policies as well as geopolitical orientations and alliances.

Ethnic and religious tensions within the countries (for Moldova and Georgia)

There are some ethnic, religious, and regional tensions present in Moldova and Georgia, as well as tensions between some minority groups. Such tensions could be further amplified and used by external actors, most notably Russia but also by Turkey, both to destabilise the countries and to be used as leverage. Even more, the absence of such tensions in real life as evident from the polls in Ukraine, does not stop Russia from discursively creating them and spreading disinformation and fakes.

Authoritarian practices and attitudes

Both surveys and election results reveal that significant parts of Moldovan and Georgian societies are keen on voting for parties and politicians with authoritarian tendencies and practices. This is reflected in the preference for economic stability and peace over insurance of individual and political freedom and civil rights. Potentially, such choices could be a threat to these countries. These attitudes are also exploited by Russia discursively bringing up Ukraine and the ongoing warfare between the countries as a result of Ukrainian's protests against 'strong leaders', the 'pro-Russian way', and preference for democracy, freedoms, and 'European values'.

3.3.2. Opportunities

Potential for regional cooperation

Unlike in the Western Balkans, there are no intra-regional tensions, and the three countries hold positive attitudes towards one another. Also, the countries and their citizens share some common history and positive experience of past interactions. This opens opportunities for regional cooperation and alliances between Ukraine, Moldova, and Georgia that have the potential to facilitate their political and economic development and assist their EU accession.

Commitment to the European integration and democracy

If one looks at the European Neighbourhood countries' societies, despite the presence of pro-Russian sentiments in Moldova and Georgia, the younger cohorts as well as urban populations there have more pro-European orientations, commitment towards democracy and democratic values, and a positive outlook on the cooperation with the US, UK and so on. In Ukraine, the majority of the population have distinct Euro-Atlantic orientations and deep commitment to democracy, its practices and values. Thus, in all three countries there are opportunities for deeper cooperation and integration with the EU, the US and so on.

4. Comparative takeaways

While the two regions under research have similarities, they also have many differences, and not only between the regions but also within. In this section the aim is to extract the most common denominators by identifying policy areas and actors which most stand out in both regions to create a better understanding of the priorities of their citizens. There is a methodological limitation to these takeaways as we are limited by surveys and polls and their methodologies, which means that data is either not entirely comparable or the questions that have been asked in these polls are not necessarily the most revealing for our purposes. However, they do offer a good overview, and in the case of the IRI polls, a comparative overview, of the issues that citizens consider important.

4.1. Key policy areas

The key policy areas identified herein constitute the policy areas which were important according to citizens in the polls. This does not mean that other issues are not important, but rather that we have made a selection of the issues which target both regions.

Economy

In both the Western Balkans and the Eastern Neighborhood countries, the economy and particularly unemployment and the cost-of-living crisis are of high concern to the citizens, more so in the Western Balkans. Overall, the issue of the economic development of these countries increases the potential for frustration and insecurity among citizens. Additionally, insecurity or uncertainty about the economy leaves these countries and the citizens vulnerable to potential external pressures.

Corruption

The issues of corruption and its scale as well as the importance of fighting corruption are seen both as a top concern politically and economically and a key policy area. In the Western Balkans organized crime and corruption are also seen as being two key issues in terms of security. In and in the Eastern Neighborhood countries corruption is seen as a way of being influenced by external actors, which intertwines both political and economic concerns and the assistance given in combating it regarded as a positive involvement of the EU and others.

Security

Security concerns particularly prevail in the Eastern Neighbourhood countries. However, when it comes to the feeling of insecurity or the presence of tension and uncertainty, it is also important in the Western Balkans.

- **Military Security**

The issue of military security is most acute in the countries of the Eastern Neighbourhood, particularly for Ukraine since the full-scale invasion by Russia in 2022. However, Moldova and Georgia also feel the strain, each having their own frozen conflicts that involve Russia, making the issue a significant concern for citizens of all three countries.

- Feeling of insecurity (internal and regional tensions)

In the Western Balkans there is a different source to the insecurity, which reveals how conflicts and tensions can leave lasting effects even after hostilities have stopped. Political tensions remain high, and when channelled through media create a strong sense of insecurity, especially in countries where the legacy of the 1990s' wars remain politically salient. There is high distrust among countries of the region towards their own neighbours, as well as the minority communities, particularly in Bosnia and Herzegovina, North Macedonia and Kosovo. Similar types of tension can be identified in the countries of the Eastern Neighbourhood, particularly Georgia and Moldova. This lack of trust and lack of internal social cohesion makes these countries extremely vulnerable to manipulation of citizens via disinformation and misinformation by external or malicious actors. Considering that some of these countries have also been vulnerable to cyberattacks in both regions, it makes the problem of disinformation more acute.

Political sentiments and perceptions

- Lack of trust in governments and political parties

Across the two regions, political parties are often seen as self-serving, contributing to societal divisions rather than addressing key issues such as corruption and economic instability. This pervasive distrust undermines democratic governance and opens the door for external influences, particularly from Russia, which is seen as an external actor in both regions. In the Western Balkans, citizens of all countries show lack of trust in their political parties and see them as fuelling nationalist sentiments for their gain. In the Eastern Neighbourhood countries, particularly Moldova and Georgia, the divisions are also ideological in terms of pro-EU versus pro-Russian sentiments, which also intertwine with beliefs between democratic versus authoritarian forms of governments. There is also a lack of trust in institutions that ought to maintain the rule of law, adding further to distrust and feelings of frustration among citizens.

- Authoritarianism versus democracy

There is a divide among citizens of the nine countries in the two regions between beliefs on whether democracy or authoritarianism are the preferred forms of governance. In the Western Balkans, democracy is not universally seen as the ideal governance model. For example, in Serbia, only 40 % of citizens believe democracy suits the country, with many favouring strong leadership. In Moldova and Georgia, there is a noticeable preference for authoritarian practices and leaders among segments of the population. This preference is often linked to a desire for economic stability and peace over democratic freedoms and civil rights. In the case of Georgia, a majority of citizens still view democracy as the best form of governance, but the pro-Russian stance of the governing party creates a tension for the consolidation of democracy.

- Nationalism

Nationalism manifests differently across and within the two regions, reflecting unique historical, ethnic, and geopolitical contexts. In Bosnia and Herzegovina, for example, it is widely recognised as a problem tied to political manipulation. Kosovo and Montenegro experience divisions over ethnic tensions, often attributed to political elites, while North Macedonia struggles with inter-ethnic distrust and nationalist

rhetoric. Serbia shows high levels of ultraconservative nationalism, often linked to anti-Western and pro-Russian sentiments. In Moldova, ethnic and religious divides are influenced by external actors like Russia, while in Ukraine, civic nationalism has strengthened as a unifying force against Russian aggression. Georgia grapples with nationalist conservatism tied to traditional values and tensions with ethnic minorities, complicating national cohesion. Across the two regions, nationalism frequently intersects with political agendas, ethnic divisions, and external influences, which in both regions are influenced by Russia to different degrees.

4.2. Main players in the two regions

Citizens in both regions share the impression that threats and opportunities are to be found both within the regions as much as outside. The countries of the regions themselves are both a source of threat and opportunity, whereas external actors such as the US and Russia are also viewed differently and often appear as both threats and opportunities in the perceptions of citizens.

Regional tensions and opportunities

Within both regions there are complicated regional relationships of both friend and foe. The dynamics are set by historical, cultural and political developments and contexts. For instance, among ethnic Albanians, both in Albania and Kosovo, the Serbian state is seen as a threat. For North Macedonians' it is Bulgaria that is seen as a threat, whereas Serbia is seen as an ally. Within the Eastern Neighbourhood countries there is a variety of allies and threats, although because of the war in Ukraine there is a very real regional threat perception related to Russia. On the other hand, there are also opportunities which emanate from the region, for instance the closeness between Moldova and Romania or Albania and Kosovo, however they follow ethnonational logic. Therefore, there is a need to test the assumptions of threats and allies and to look further into nuances. For instance, while Albania is negatively perceived in Serbia, the polls still show that Serbians are open to regional cooperation.

External actors

A number of global and regional external powers are identified as important actors in both regions, yet there is no consensus within or between the regions about how to assess them.

- **EU:** There is overwhelming support for EU accession in both regions. Whereas in the Western Balkans the process has been longer and there is also disenchantment with it, the overall support remains. The only notable exception is Serbia, where support for EU accession is lower than those rejecting it. In the Eastern Neighbourhood countries there is substantial support for EU membership. In Ukraine across all social and demographic groups no alternative is seen to EU accession. In Moldova and Georgia in some cases the support for the joining of the EU is limited to more progressive and younger populations. However, herein the EU is also tied to the expectations that citizens have of democratisation and development of their countries as they see the EU as having a role in key reforms.
- **US:** The US is seen a key player in both regions. In the Western Balkans it enjoys great popularity in some countries such as Albania and Kosovo. However, Serbia sees it as a threat, and others, such as

Bosnia and Herzegovina and Montenegro, are divided along identity lines. Interestingly, the US is also more trusted as a security provider than NATO, although it is a part of NATO. In the countries of the Eastern Neighbourhood the US also has a varied perceived role and trust. In Ukraine the US is held in high regard, particularly due to the military and financial support that Ukraine has received from the US during the war. In Moldova and in Georgia there is a more nuanced view due to the pro-Russian sentiments that exist in these two countries.

- **Russia:** Russia is a key external actor in both regions, but in some countries more than others. In some countries of the Western Balkans, such as Serbia, it is seen as a key ally, whereas in others, such as Albania, it is considered a threat. In the Eastern Neighbourhood countries Russia is seen mainly as a threat, and the major threat at that. Still, in Georgia and Moldova there are strong pro-Russian sentiments in some parts of the population.
- **Turkey:** Turkey has a very positive perception in the Western Balkans, whereas in the Eastern Neighbourhood there is more of a nuanced view of it as Turkey plays a balancing act in their relationship with Russia. However, it still enjoys popularity both for its support of the war effort in Ukraine and as an economic partner in Georgia and in Ukraine.
- **China:** While China does appear as an actor, it is not much noticed by citizens in the two regions and the perceptions vary. In Serbia and Montenegro, where there has been more visible engagement with China, it is more prominent, but in the other countries it is not seen as an important external actor by citizens. In the Eastern Neighbourhood countries, it is also seen as one that has limited relevance, though in Ukraine is seen more negatively due to China's assistance to Russia (perceived and real).

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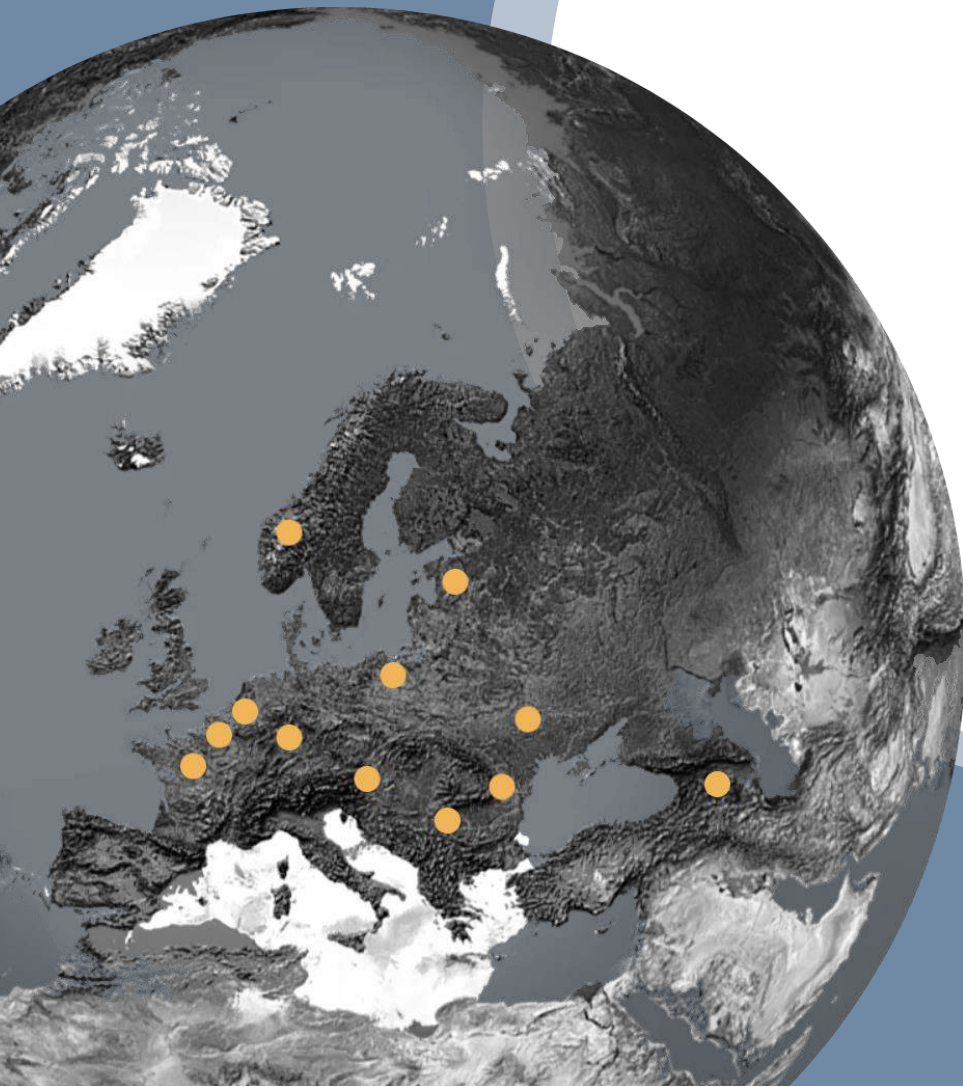


Mapping existing surveys and perceptions that actors in EN & WB countries have (the policies and (in)actions of) the EU and other external actors – November 2024

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