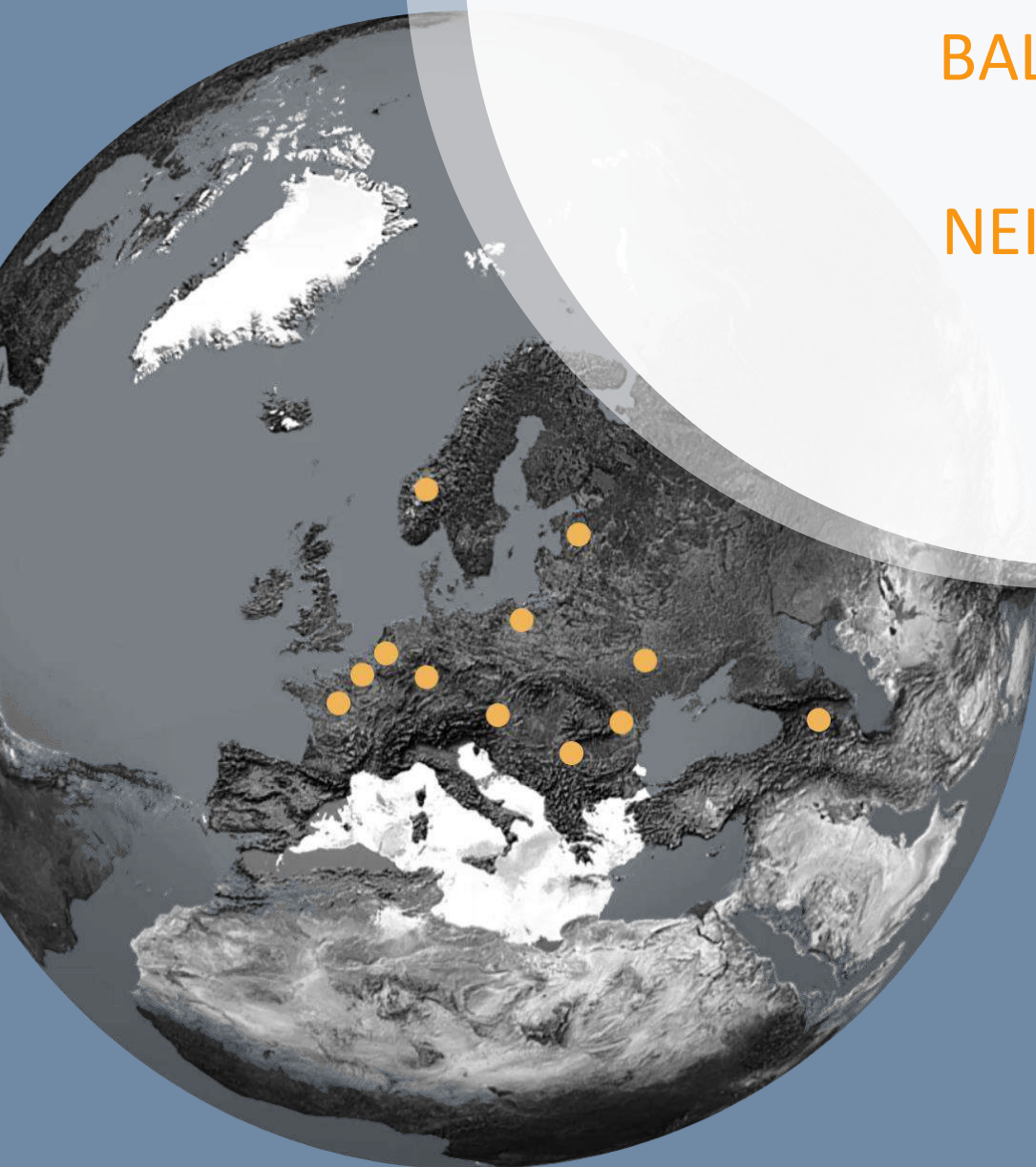# PERCEPTIONS OF EXTERNAL INFLUENCES IN THE WESTERN BALKANS AND THE EASTERN NEIGHBOURHOOD COUNTRIES

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REUNIR – D6.3 – WORKING PAPER 12 - ANALYSIS OF LOCAL PERCEPTIONS AND KEY POLICY AREAS AND THEIR RELATIONS TO EXTERNAL ACTORS

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0.2	15.05.2025	First draft of the report
0.3	15.06.2025	Second draft (incorporating feedback from peer reviewers)
1.0	25.06.2025	Final version

CONTENTS

INTRODUCTION TO THE COUNTRY REPORTS

Lura Pollozhani, Florian Bieber

The REUNIR project aims to analyse and assess threats and opportunities for engagement with the countries of the Western Balkans (Albania, Bosnia and Herzegovina, Montenegro, North Macedonia, Kosovo, and Serbia) and the Eastern Neighbourhood (Georgia, Moldova, and Ukraine) on their path towards EU integration. The project also seeks to build future scenarios based on the data it will gather throughout its implementation. Within this framework, Work Package 6 is dedicated to looking at the issue of external actors and their influence from the bottom up. As part of this task, researchers of the different country teams first conducted a mapping exercise of the perceptions of citizens and actors in the countries of the WB and EN on the EU and other external actors (Pollozhani *et al.,* 2024). The data for the mapping exercise relied on the methodology of various surveys and the data contained therein. With this report the aim is to go deeper and get a better understanding from experts and citizens in alignment with the REUNIR methodology.

Methodology

The country reports analyse the perceptions that experts and citizens in both regions have of the threats and opportunities for their countries and the perceptions that they have of external actors. The data gathering process involved at least 10 semi-structured elite interviews with experts per country. The experts came from various fields including academia, civil society, state institutions, the private sector, political parties, and other relevant bodies. In addition, the country researchers organized two focus group discussions per country, whereby one was held with experts, whereas another one was held with citizens. In the case of Bosnia and Herzegovina two focus group discussions with citizens were held to obtain a more representative sample. In total REUNIR researchers spoke with 293 interlocutors (see table 1 for details)[1], of which 116 were women and 177 were men. The interviews and focus group discussions were carried out between February and March 2025. They are anonymised and the interviewees are identified by their individual codes, to maintain clarity and anonymity.

In the case of Georgia and Serbia we had limitation due to ongoing protests on the ground and a boycott from civil society organisations of state institutions. In order to mitigate this, external researchers contacted state institutions so that their point of view could also be included, to limited success. Due to the environment in Georgia, we have also kept the affiliations of the interlocutors anonymous in order to not create a potentially unsafe environment for them. In the case of Ukraine, all interviews and focus group discussions were organised online in order to ensure the safety of both researchers and interlocutors, following a previously developed risk assessment and response plan.

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[1] In the case of Albania, interviews were added to the research at the later stage which has changed the total of the number of interviews from the data gathering stage from 283 to 293 interlocutors in total.

Interlocutors by Country, Sector, and Gender

Country	Academia	Civil Society	State Institutions	Private Sector	Political Parties	Other	Men	Women	Total
Albania	6	11	4	3	0	7	21	10	31
Bosnia and Herzegovina	5	5	4	2	0	7	17	6	23
Georgia	7	11	1	2	0	10	18	13	31
Montenegro	5	9	6	0	0	11	16	15	31
Moldova	1	17	15	6	4	8	27	24	51
North Macedonia	6	9	3	1	0	15	23	11	34
Kosovo	4	16	3	1	2	6	19	13	32
Serbia	3	10	2	3	0	17	19	16	35
Ukraine	4	13	0	0	2	6	17	8	25

Comparative takeaways

The data obtained from the field work show that both regions have been affected by the full-scale invasion of Ukraine by Russia. In Ukraine, Russia represents an existential threat, with the country facing both current threats and future risks and threats due to the war. In the other two countries of the EN, Russia also represents an existential threat. In the WB countries, too, Russia is highlighted as a malign influence, in Kosovo particularly, where Russia's ties with neighbouring Serbia are of particular concern. In Serbia, Russia is seen positively by state officials, but not by experts. Due to the influence that the war in Ukraine is having in both regions, whether directly or indirectly, the reports show a strong focus on security, which was also highlighted during the mapping exercise. Perhaps due to the focus on security, countries like Türkiye are seen positively because they are NATO allies to countries like North Macedonia, Albania and Montenegro. Türkiye's influence does raise some concerns in the field of cultural diplomacy and soft power,. though there is an overall positive view of Türkiye as an actor in the countries of the WB. This marks a significant shift, except for in Serbia. Türkiye does not figure in the case of two EN countries, whereas in Ukraine it is an important actor to work with, particularly in the area of defence. China and the UAE are seen mostly as impactful actors in economic terms, but not in political terms. In the case of Serbia, China is seen positively as an economic partner, whereas in Georgia the view is negative as their interests are seen to be aligned with those of Russia. The US is generally seen as a strong ally, with its presence and support continuing to be relevant, particularly as a NATO ally. The EU, on the other hand, although seen positively and supported, is viewed as having a fading influence and an inconsistent approach. This raises serious concerns over its ability to influence change and reform in both regions.

In terms of policy areas identified in the reports, several coincide with the mapping exercise. These include security, the economy, and rule of law, while others such as media governance and ownership, and civil society and human rights, are new. The country reports each present detailed analyses on the policy areas

and challenges per country, though there are shared common areas throughout. The policy areas that emerge are the following:

1. Security

Security and defence were recurring themes during the interviews and the focus group discussions. The war in Ukraine, as well as the implications for both regions, have awakened insecurities and made the topic central to all countries. Even Albania, which has not seen any military threats within its borders, is implicated in regional developments, -particularly Kosovo.

2. Democratic governance and rule of law

Corruption and political ideologies were already highlighted as issues in the mapping exercise. These were supported by the results of the field work as well. The need for a democratic culture and rule of law was highlighted in the country reports, as well as concerns of authoritarian drifts in the cases of Georgia, Serbia, and Bosnia.

3. Media and disinformation

The issue of media governance and ownership was highlighted as a concern. In some countries such as Serbia and Georgia, there were concerns over state influence of the media. In Albania and Kosovo, there were concerns over the ownership of media outlets, and whether they represented foreign interests and agendas. Whereas in Montenegro, Georgia, Moldova, and Serbia, interlocutors were concerned specifically about Russia-backed disinformation campaigns and their influence on citizens.

4. Economic policies and dependencies

Concerns over external influences also related to the economy and infrastructure projects, where countries like China, Türkiye, and UAE were exerting influence. Energy dependency on Russian gas was also highlighted as a concern in the cases of Moldova, North Macedonia, and Georgia. The latter was particularly concerned over the economy, which had received an illusionary boost due to Russian citizens investing in the country that experts thought would be short lived. On the other hand, the EU and its Member States can be key to economic development and recovery, particularly in the case of Ukraine, but also throughout all countries.

5. EU integration

The countries of the WB showed concerns over the drawn-out process of the EU integration process. There were also concerns in the case of Kosovo as to the influence that EU sanctions have had on its image. In the case of Georgia, which declared that it would pause accession talks, there were fears as to whether civil society and activists could create enough pressure to change the direction of the country back to the EU track. In Ukraine, too, there are fears that the EU integration process might stall after the war, potentially leading to public resentment. Overall, there is need for more streamlined and direct engagement from the EU in these countries as there are concerns over the negative influence that a protracted enlargement process might create, after many years of built-up frustration.

6. Civil society and human rights

At the time of research protests were happening in two countries, Georgia and Serbia. Partner organisations in those countries were boycotting state institutions in solidarity with activists. There were real concerns over the directions that these two countries were taking. The role of civil society and respect for human rights however were a concern elsewhere as well. There is a need to support and create civil society, as this continues to be an important actor in both regions in advancing democracy and democratic practices.

7. Brain drain

The issue of brain drain and particularly the emigration of youth is of concern in both regions and forms a key policy area. Poor working conditions as well as the lack of meritocracy or opportunities is pushing youth towards pursuing alternative paths elsewhere, leaving the countries at risk of depopulation or having a limited professional workforce. In Ukraine, the issue of demographic change is even more acute, as in addition to the mass internal displacement, many Ukrainians have left the country as a result of the full-scale invasion by Russia. It is not certain how many will potentially return to the country.

1. ALBANIA

Besjana Kuçi

1.1. Introduction

Albania is a committed Euro-Atlantic country, a NATO member, and a long-standing candidate for EU membership. This orientation shapes Albania's strategic discourse and geopolitical identity. However, as this research reveals, declarative commitments to the West often coexist with governance challenges, socio-economic vulnerabilities, and increasing exposure to foreign influence.

Albania's foreign policy is formally and rhetorically pro-European. Public support for EU membership remains among the highest in the region, a sentiment consistently reflected in surveys by RCC Balkan Barometer (2024), and national opinion polls (Metanj *et al.*, 2023). Yet, this consensus coexists with growing disillusionment around the pace of reforms, the instrumentalisation of EU conditionality by local elites, and an increasing reliance on external validation for domestic political legitimacy.

This report provides an in-depth analysis of how these dynamics shape perceptions of external actors within Albanian society, combining literature review with qualitative fieldwork to explore how these actors are perceived to influence security, democratisation, economic development, and broader socio-political trajectories. A wide range of institutional sources and studies were analysed, revealing a complex landscape of perceptions shaped by overlapping policy, economic, cultural, and security dynamics.

While Albania's strategic alignment with the EU is explicit, it is often driven more by external incentives than by a domestically rooted reform agenda. Economically, although the EU remains the primary reference point, China and Türkiye have made notable inroads through investments and aid, often seen as faster and less encumbered by bureaucracy. Culturally, Türkiye's influence is increasingly visible, particularly through education, religion, and media, whereas EU engagement tends to be limited to elite-level initiatives and youth mobility programmes. In terms of international relations, there is strong awareness of power rivalries: Russia is largely viewed as a destabilising force, especially through its ties with Serbia, while perceptions of China remain ambivalent. Security threats are understood as predominantly hybrid—such as cyberattacks, disinformation, and covert intelligence activities.

Expert interviews and interviews with the public showed that perceptions are shaped by an awareness of global shifts and local constraints, and that Albania's resilience to malign influence is contingent not only on alignment with partners, but on genuine institutional transformation and inclusive democratic practices.

This report is structured to reflect these interlinked dynamics. The following sections will examine the perceptions of military, socio-economic, and political threats and opportunities in detail. They aim to offer insight into how local actors assess Albania's geopolitical position—and where they believe the EU and other partners can make a meaningful difference.

1.1.1. Methodology

This report is based on a combination of desk research and qualitative fieldwork, to capture both existing data and deeper insights into how external actors are perceived in Albania. The approach was structured to ensure that perceptions from both informed stakeholders and ordinary citizens were represented in a balanced way.

The fieldwork included eight semi-structured interviews with experts from a range of fields, and two focus group discussions—one with citizens and one with informed stakeholders (academics, private sector associations, civil society activists, former politicians). Participants were selected to reflect a diversity of backgrounds, affiliations, and perspectives. The expert interviews were conducted with representatives from academia, civil society, media, the private sector, and the security field. Each interview was guided by open ended questions to grasp local perceptions of the EU and other external actors in the domestic arena. These interviews offered insight into how perceptions of external actors vary across professional sectors and thematic domains such as governance, foreign policy, economic resilience, and security.

The focus group with informed stakeholders[2] brought together six experts from different fields. The discussion was structured around perceptions of foreign influence in Albania's policy environment and what kind of external support is most needed.

The citizen focus group[3] included eight participants from a mix of age groups, educational backgrounds, and employment statuses. The conversation touched on perceptions of foreign actors, trust in institutions, and how Albania's alliances shape everyday experiences and expectations (for more information see Table 1).

Table 1. Interlocutors for the interviews and focus group discussions by category and by gender.

Country: Albania	Interlocutors	Number
	Academia	6
	Civil Society	11
	State Institutions	4
	Private businesses/chambers of commerce	3
	Political Parties	
	Other (specify)	7

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[2] This focus group was held in Tirana on March 17, 2025.

[3] This focus group was held in Tirana on March 21, 2025.

	Women	10
	Men	21
Total		31

All interviews and group discussions were conducted in person, recorded with consent and transcribed in their original language. Informed consent was obtained from all participants, with anonymity guaranteed where requested. The interviews were conducted by the author of this report, as well as researchers of the REUNIR consortium who travelled to Tirana for the field work. All researchers had a detailed methodology to follow and maintained the ethical standards ascribed from the beginning of the research.

1.2. Perceptions on external actors in Albania

1.2.1. Context

Albania's geopolitical trajectory is strongly pro-Western, anchored in its NATO membership since 2009 and its official EU candidate status. These strategic alignments are reflected in the country's core policy documents, particularly the National Security Strategy (2024), which identifies Albania's security interests at global, regional, and national levels as closely tied to Euro-Atlantic structures, democratic consolidation, and resilience against malign foreign interference (Law No. 14/2024, Assembly of Albania, 2024).

The strategy places explicit emphasis on threats such as foreign economic and financial penetration, malicious disinformation, and the protection of critical infrastructure, alongside conventional concerns like terrorism and organised crime. It also acknowledges the importance of developing **cybersecurity** and enhancing public trust in democratic institutions.

On 18 March 2025, in Tirana, the Defence Ministers of Albania, Croatia, and Kosovo signed a Joint Declaration (Ministry of Defence of Albania, 2025) reaffirming their commitment to strengthening trilateral defence and security cooperation. Recognising shared values and strategic interests, they pledged to enhance joint efforts in defence capacity-building, industrial cooperation, and interoperability through joint training and education. The declaration emphasised coordinated responses to evolving security threats, including hybrid and cyber threats, and expressed strong support for Kosovo's Euro-Atlantic integration. It outlined ambitions aligned with NATO and EU strategic frameworks, while confirming the declaration does not create binding legal obligations but reflects a shared vision of friendship, solidarity, and regional stability.

One of the most significant events shaping perceptions of external actors was the 2022 cyberattack by Iran, which paralysed government services and prompted Albania to sever diplomatic relations with Tehran. Although ultimately contained, the attack served as a wake-up call to Albania's vulnerability to hybrid threats (SCIDEV, 2025). This led to legislative reforms, notably Law No. 24/2025 on Cybersecurity, aimed at strengthening institutional responses to digital risks and aligning more closely with EU and NATO cyber defence standards (Law No. 25.2024, Assembly of Albania, 2025).

Further steps include the establishment of a Special Parliamentary Committee on Countering Foreign Interference and Disinformation, which produced a draft national strategy (2025–2030) aimed at preserving the integrity of democratic processes against covert influence (Assembly of Albania, 2024). Public awareness of such interference is relatively high: according to a 2024 Albanian Helsinki Committee survey, nearly half of respondents believe foreign powers interfere in Albania's elections, with Russia, Türkiye, China, and Iran listed as the most common sources (Albanian Helsinki Committee, 2024).

The Albanian Security Barometer (2024) also reveals a population increasingly aligned with Western partners in its perceptions of security. The US, EU, and Türkiye are largely viewed positively, while Russia and Iran are seen negatively. Interestingly, China's image remains ambivalent, reflecting a strategic ambiguity in public discourse (CSDG, 2024).

Despite Albania's formal alignment with Western actors, it is not immune to foreign influence. Reports show that pro-Kremlin disinformation has penetrated local media, especially through covert sponsorship and content-sharing agreements with certain outlets (Voko and Likmeta, 2023). Similarly, China and Türkiye have leveraged economic and cultural channels—through cultural institutes, vocational centres, and construction projects—to expand their soft power footprint.

At the same time, international observers note a paradox in Albania's foreign engagement: while actively supporting global and regional security, Albania continues to struggle with internal instability, elite polarisation, and democratic stagnation. Many domestic reforms—especially in security, defence, and media pluralism—are externally induced, more reactive to EU and NATO assessments than internally-owned initiatives (Dumont et al. 2023). As one analysis puts it, "there is a tendency among the political elite to seek external rather than domestic legitimacy for reforms" (Dumont et al. 2023).

Finally, Albania's perceived role in regional frameworks—like the Open Balkan initiative—has sparked debate. Some analysts frame it as a practical move toward economic integration, while others warn it could serve as a vehicle for Serbian and Russian influence, bypassing EU frameworks and weakening conditionality standards (Beshku, 2023).

This complex context—marked by formal strategic alignment with the West but functional vulnerabilities to foreign influence—frames the findings of this report. It explains why perceptions of external actors are shaped not only by geopolitical orientation but also by pragmatic assessments of power, performance, and presence on the ground.

1.3. Military threats, opportunities and resilience

Perceptions of military threats are shaped not by imminent battlefield scenarios, but by a complex interplay of unresolved regional disputes, hybrid vulnerabilities, and strategic dependence on NATO. While Albanians remain broadly trusting of the country's Euro-Atlantic alignment, there is a persistent undercurrent of doubt about Albania's own readiness and the credibility of external security guarantees under real crisis conditions. Also, as one of the experts pointed out, "it is unclear how the Albanian government sees the development of its security capacities. There have been some positive developments with regards to the military, with

regards to pay, and the production of military hardware, but there does not seem to be a coherent strategy, a coherent defence strategy" (AL203, 2025).

Interviews with security and academic experts pointed to a consensus: Albania's military vulnerability is less about invasion and more about regional instability, particularly the unresolved status of Kosovo and Serbia's increasingly assertive posture. As a professor of identity politics at the University of Tirana put it: "Every threat to the situation in Kosovo is a direct threat to Albania. Serbia, with Russian backing, remains the most credible destabilising actor in the region" (AL204, 2025). Another expert with knowledge on security issues added that although Albania is not a direct target, "any deterioration in Bosnia or Kosovo could drag Albania into a larger regional conflict, and our ability to navigate that is limited" (AL205, 2025).

Russia, though geographically distant, looms large in strategic assessments. Several experts pointed to Moscow's use of Serbia as a proxy and a spoiler in the Western Balkans, drawing comparisons with how Russia supported separatists in Donbas. A security expert (AL205, 2025). warned that Albania, as a smaller NATO member, could be seen as "expendable" in a crisis, highlighting a fear that security guarantees may not hold in high-stakes scenarios.

This anxiety is compounded by recent hybrid attacks, notably the 2022 cyberattack attributed to Iran. According to an expert on media, that incident exposed "not just digital vulnerabilities, but how unprepared institutions are to coordinate under pressure" (AL206, 2025). Another expert echoed the concern, describing Albania's institutional response as "reactive and externally driven," (AL207,2025) with cybersecurity reform often launched only after a breach. Participants in the expert focus group also highlighted the presence of foreign intelligence actors. A professor of identity politics at the University of Tirana referenced the 2022 arrests of Russian operatives as "only the tip of the iceberg," (AL204, 2025) stressing the long-standing nature of espionage activities in Albania and the lack of a coherent counter-intelligence strategy.

Despite these threats, experts acknowledged Albania's strategic advantage as a NATO member. An expert on private sector described it as a "security umbrella that gives Albania global insurance, provided the country contributes actively, not just nominally" (AL208,2025). NATO's presence was widely seen as a deterrent, especially in the face of Russian influence. NATO was often described as Albania's main security guarantor, though some participants questioned the extent of Albania's own contributions.

Several experts emphasised that NATO membership alone is not a substitute for national preparedness. "NATO is a framework," said an expert on economics, "but deterrence requires national credibility. Right now, Albania lacks logistical infrastructure and civilian-military coordination to respond to real scenarios" (AL205, 2025). The military was described as under-resourced and politically insulated. "There's no societal buy-in," said a participant in the citizen focus group discussion. "No one outside the institution cares what the army does."

Younger generations, in particular, were seen as detached from national defence narratives. As Sulstarova noted, "there's a generational gap, we've outsourced our security and with it, our sense of national responsibility". This disconnect, coupled with low institutional visibility, weakens the internal resilience required to complement NATO's external guarantees.

In the citizen focus group, most participants initially expressed low concern about military threats, often deferring to NATO as Albania's ultimate guarantor. However, after a discussion, several raised concerns about Russia and Serbia, referencing the war in Ukraine as a warning signal. One participant noted that while Albania is not in a direct conflict like Ukraine, instability in the region could have spillover effects that would quickly escalate vulnerabilities. Trust in NATO remained strong, but citizens were not always confident in Albania's own ability to withstand pressure.

Overall, the fieldwork paints a picture of a country with high strategic alignment but low internal confidence. While experts stress the importance of partnerships with NATO and the EU, particularly in areas like cybersecurity and defence reform, they also worry that Albania is over-relying on symbolism and underinvesting in substance. The result is a fragile security ecosystem: buffered by alliance but hollow in national resilience.

While the risks are considerable, the interviews also underscored several areas of opportunity for strengthening Albania's security architecture. Albania's status as a NATO member is widely regarded not only as a deterrent but also as a platform for capacity-building. Experts pointed to ongoing bilateral cooperation with the US, NATO-supported upgrades to Albania's airbase in Kuçovë, and the country's participation in regional military exercises as positive developments. According to one interviewee from the defence sector, "These exercises do more than train soldiers -they socialise our structures into NATO's operational culture, and that's a form of resilience in itself" (AL208, 2025).

Another area of opportunity lies in the alignment with Western security doctrines on cyber threats and hybrid warfare. An expert on media governance (AL206, 2025) noted that while Albania still struggles with inter-agency coordination, the awareness of cyber threats has increased significantly in public institutions. Several experts highlighted the importance of engaging with EU and NATO cyber defence mechanisms, not only for funding and equipment but also for institutional learning and trust-building among national actors.

Yet despite these entry points, the report also highlights gaps in national resilience. A common theme was that Albania's strategic partnerships have not been matched by domestic investment in defence culture or institutional integrity. Multiple experts called for a recalibration of national defence education and a clearer doctrine for civilian engagement in national security. The lack of a unified strategic communication platform on defence issues was also noted. "People support NATO," said one expert in the focus group discussion, "but they don't understand what it means day to day. That gap weakens us from within".

Resilience, in the eyes of respondents, is not only about readiness to face attacks but also about the public's understanding of where threats come from and what roles institutions play. Some suggested that Albania should take a more proactive role in NATO-led initiatives in the region, not only to boost its own credibility but to anchor itself more visibly in the regional security conversation. Some experts emphasised the importance of viewing Albania not only as a security beneficiary, but as an active contributor within NATO.

Among citizen participants, especially those younger than 35, there was a willingness to learn more about security issues and a cautious openness to ideas like cyber-defence education and digital resilience initiatives. While not everyone supported mandatory service or military reform, there was a consistent call for better civic education around national security and foreign influence. There was a shared view that while Albania

benefits from external defence commitments, broader societal engagement with national security issues is lacking.

Furthermore, a security expert (AL203, 2025) has noted that "there has been a positive development, an alliance, or an agreement rather, between Albania, Kosovo and Croatia, but I think that it's unclear that this fits within the NATO framework or whether it fits at all within the NATO framework. So, what are the dimensions of the cooperation, how it will look in the future and so on and so forth. But then if we look at the balance of power, the problem is that, you know, Albania is trying to have these alliances, as I mentioned, with, or agreements, or military cooperation with Kosovo and Croatia on the one hand, it's having close cooperations with Türkiye on the other. More recently, it has signed a number of agreements with Italy as well to develop its defence which are positive, but I do not think that those are enough. And furthermore, it's unclear, again, as I mentioned, what specific strategic objectives these agreements are seeking to address. So, you have all these developments on the side, but it is unclear how the Albanian government sees the development of its security capacities".

In sum, the data reveal a country that remains strategically secure but domestically underprepared, with its resilience grounded more in alliance than in internal coherence. The opportunities for improvement are clear: deeper integration into NATO processes, targeted capacity-building, better public education, and the political will to treat national defence not as a symbolic commitment but as a living system that requires investment, communication, and participation.

1.4. Socio-economic threats, opportunities and resilience

Socio-economic vulnerabilities emerged as one of the most consistent concerns across expert interviews and citizen focus groups. Albania's economy was widely described as structurally fragile, overly dependent on remittances and informal labour, and lacking a productive industrial base. These internal weaknesses, many respondents noted, are compounded by persistent corruption and underdeveloped public institutions, making the country susceptible to both internal mismanagement and external influence.

EU integration continued to be seen as a long-term anchor of stability and reform. However, many expressed frustration at the slow pace of progress and the superficial application of EU standards in practice. Several experts and citizens described reforms as largely rhetorical, with implementation often derailed by vested political interests. As a journalist put it, "money laundering is a big threat the country's economy. If we want to make a little bit more order and classify things, I would say that internal risks are without any doubt corruption, organised crime, and money laundering" (AL209, 2025). Others warned that external actors, particularly Türkiye and China, are expanding their economic footprint by offering investments that circumvent transparency standards. According to another security expert, such arrangements often "reinforce clientelism and deepen our dependency" (AL205, 2025).

A central concern, especially among younger participants, was the ongoing emigration of skilled labour. An expert on media emphasised that "one of the most critical threats to Albania is the ongoing flight of talent across all sectors, especially healthcare, IT, and education" (AL206, 2025). The citizen focus group echoed this concern, with several participants expressing a lack of confidence in long-term opportunities in Albania.

Several younger participants expressed a sense of having no viable future in Albania, despite their preference to stay.

This anxiety over emigration was closely tied to a broader sense of economic insecurity. An expert on economics argued that "Albania's economic model is built on fragile foundations, tourism, remittances, and consumption, not sustainable productivity" (AL207, 2025), making it acutely exposed to external shocks, especially in EU labour markets where many Albanians work and send remittances.

Foreign investment was a recurring theme. Some acknowledged that funding from Türkiye and China tends to move faster and with fewer bureaucratic hurdles than EU support. However, concerns were raised regarding transparency and long-term accountability. According to an expert with knowledge on security issues, many of these so-called strategic investments "are not subject to scrutiny" (AL205, 2025). Focus group participants noted a perceived imbalance between the visibility of these projects and the actual public benefit they deliver.

Turkish-funded institutions, especially in education sector, were described with ambivalence. They are recognised for creating opportunities in underserved areas, but some respondents questioned whether they promote long-term self-reliance or embed new forms of ideological dependency. Some participants viewed Turkish-funded educational institutions as beneficial yet also noted that they may carry underlying cultural or political influence.

Corruption and elite capture were described as systemic. An expert on private sector explained that "economic growth is uneven because the rules are uneven, opportunities are allocated through access to power" (AL208, 2025). Several participants in the citizen focus group expressed frustration that international support, whether from the EU or non-Western partners, often appears to benefit political elites over ordinary citizens. Aid and development projects, they felt, are absorbed into a system that lacks accountability.

A newer area of concern identified in interviews was the growing gap in digital and financial literacy. While the state promotes digital governance as a reform milestone, several experts cautioned that many Albanians lack access to the infrastructure and skills to engage with digital services. An expert on media (AL206, 2025) noted that Albania ranks among the lowest in the region in digital competencies, exposing vulnerable populations to hybrid economic threats, including fraud, misinformation, and online scams.

Despite these challenges, many respondents also saw clear opportunities for reform and resilience-building. EU integration, though widely criticised for its delays, remains the most credible framework for advancing systemic change. An expert on EU integration stressed that "the acquis is a roadmap not just for regulation but for long-term stabilisation—if implemented with sincerity" (AL210, 2025). He and others pointed to youth employment, rural development, and green and digital investment as sectors where EU support could have tangible and lasting effects.

Younger citizens and women in the focus group associated EU accession with hope for a fairer and more modern society, even if they were sceptical about timelines. Participants emphasised that EU support would be more impactful if it were more visible and directly connected to local needs.

Some experts also discussed the potential for rebalancing Albania's international economic partnerships. While EU aid was seen as rule-bound and slower, it was viewed as more ethical and sustainable. Two

experts emphasised that Chinese and Turkish aid, while welcome in infrastructure terms, often operates in politically grey areas that bypass institutions and accountability mechanisms (AL207, 2025; AL208, 2025). Several experts expressed concern that while non-Western actors may not be inherently illegitimate, their engagement often exploits weak institutions and low public accountability in Albania.

A participant in the experts' focus group pointed out that Albania's priorities align with EU criteria for Chapters 23 and 24. The demands and expectations placed upon Albania by the EU during its accession negotiation process particularly concern justice reform, anti-corruption efforts, human rights, and adherence to migration and visa policies. The emphasis is on tangible results and a clear "track record" of progress.

Finally, Albania's diaspora was widely identified as an underused asset. Preci observed that many Albanians abroad are willing to invest but are discouraged by legal ambiguity and lack of institutional support. While not directly quoted, several experts indicated that diaspora investment could be transformative if trust were restored through regulatory clarity and administrative reform.

Still, the overall picture remains mixed. Macroeconomic indicators offer little reassurance in the absence of institutional trust. Without addressing systemic corruption, strengthening institutional accountability, and creating space for civic engagement and inclusive economic policies, the country will remain exposed to both internal mismanagement and external pressures. Yet, with the right reforms and a credible commitment to aligning economic development with democratic values, Albania can harness its human capital and strategic position to build a more sustainable, resilient, and equitable future.

1.5. Political threats, opportunities and resilience

The political landscape in Albania emerged from the fieldwork as the domain most affected by fragility and foreign influence. Experts and citizens alike consistently identified politicisation of institutions, state capture, and public disengagement as fundamental challenges. While the EU and NATO remain highly regarded as Albania's strategic and normative anchors, several respondents criticised what they viewed as Western tolerance of illiberal practices, provided Albania maintains its geopolitical alignment. This contradiction, they suggested, weakens the credibility and transformative potential of international engagement.

A recurring theme across expert interviews was the persistence of state capture, described by multiple interlocutors as "chronic" and "entrenched." A professor of identity politics at the University of Tirana argued that Albania is "close to an electoral autocracy," where formal democratic procedures exist but power remains concentrated within a narrow ruling elite. He further noted that the EU's emphasis on regional stability often leads it to "close one eye" to democratic regression, diminishing the pressure for genuine reform (AL204, 2025).

This concern was echoed by a security expert (AL205, 2025), who cited the politicisation of institutions as the single most serious obstacle to democratisation. Political parties, he argued, are deeply embedded in state structures, rendering meritocratic appointments nearly impossible and turning reforms into "recycled narratives with no enforcement". The perception of institutional paralysis was widely shared among experts across sectors.

The citizen focus group reflected similar frustrations at the grassroots level. Participants described the political class as entrenched and self-serving, where electoral cycles change the faces in office but not the underlying practices. A participant reflected that political elites appear more motivated by control over public resources than by ideological alignment, capturing a widespread disillusionment with the role of ideology in Albanian politics.

Electoral disillusionment featured prominently, especially among youth. An expert on media noted that persistent polarisation between the two main political parties has marginalised alternative voices, leaving voters with little meaningful choice (AL206: 2025). Several citizens admitted they had abstained from recent elections, feeling that their participation would not affect outcomes—a clear sign of what many referred to as democratic fatigue.

Concerns about the rule of law also surfaced throughout the fieldwork. Despite the institutional architecture introduced under the justice reform process—including the establishment of the of Special Anti-Corruption and Organised Crime Structure (SPAK)—many respondents expressed scepticism about judicial independence. An expert on economics emphasised that political interference remains a defining feature of the legal system, with arbitrary decision-making and inconsistent court rulings undermining public trust (AL207, 2025).

The media landscape was identified as a key vulnerability. Two experts with knowledge on media governance and economics highlighted that a large portion of the media sector is owned or influenced by politically connected business groups. This dynamic erodes journalistic independence and reduces the media's function as a public watchdog (AL206, 2025; AL208, 2025). Experts noted that much of the media landscape is shaped by ownership patterns closely tied to political and business elites. Furthermore, concerns about foreign influence were raised. In the experts' focus group discussion, one participant noted that "studies reveal an increased presence of anti-European and anti-American rhetoric in Albanian media, both directly and indirectly. Unfortunately, this doesn't help us create an accurate and consistent image for our allies. On the contrary, this rhetoric aims to influence Albanians' perception of their strategic alliances".

Some experts also raised concerns about external influence in domestic political processes, not through overt coercion, but via elite networks, foreign-sponsored foundations, and ideological outreach—particularly through religious and educational institutions. While not perceived as immediate threats, such influences of China, Russia, Türkiye were flagged as long-term risks in a context where institutional resilience is limited.

Despite this sobering assessment, many respondents identified opportunities for democratic renewal, primarily through the EU accession process. While they acknowledged that EU leverage has weakened in recent years, most saw it as the only remaining external framework with the capacity to enforce meaningful reforms. An expert on EU integration argued that when tied to benchmarks like judicial independence, electoral fairness, and media pluralism, EU conditionality can serve as a set of "pressure points" to reopen Albania's democratic horizon (AL210, 2025).

Several experts emphasised the importance of civic education, media literacy, and youth engagement as bottom-up tools to rebuild trust. Investments in independent journalism and fact-checking platforms were seen as particularly urgent, not only to combat disinformation, but to foster an informed electorate.

Transnational cooperation also featured as a potential avenue for resilience. Interviewees advocated for deeper engagement with regional and European networks of civil society organisations, legal watchdogs, and investigative journalists, arguing that such cross-border coalitions could offer both solidarity and accountability.

While the emergence of new political forces was welcomed in theory, most respondents viewed them as still marginal. A journalist pointed out that "it is very important for the country also to cultivate a healthy opposition that is going to be there and would be a competitor for the change of power, for the political rotation, which is one of the major pillars of democracy" (AL209, 2025). A media expert also stated that "we have a high level of political polarisation centred around two main political parties, that these two strongholds, power strongholds, do not allow much space for new voices, new political alternatives to grow and to be sustainable" (AL206, 2025). "The electoral system that makes it very hard for new parties to be able to have seats in the parliament," stated an EU integration expert (AL210, 2025). Initiatives backed by the diaspora, or locally rooted movements face considerable structural barriers: limited access to media, weak financial support, and a restrictive legal environment.

The report finds that Albania's political resilience remains thin across multiple layers. Political parties are often seen as protectionist vehicles for economic elites. Electoral management bodies are technically functional but politically compromised. Public consultation mechanisms are frequently described as procedural rather than participatory. An expert observed that while Albania maintains the appearance of democratic procedures, effective political competition remains limited (AL210, 2025).

This leaves Albania exposed to democratic stagnation from within and soft capture from abroad—a scenario in which a country maintains the appearance of reform while deviating from its core democratic commitments. Rebuilding trust will require not only structural reforms but a renewed effort to connect institutional legitimacy with citizen engagement, anchoring Albania's Western aspirations in a credible domestic foundation.

1.6. Policy areas

This section does not offer normative recommendations but rather outlines policy areas where local actors—across both institutional and citizen levels—expressed a clear need for external support, particularly from the European Union. The priorities below emerged from both the mapping exercise and the qualitative fieldwork (interviews and focus groups). Together, they reveal a clear need for targeted external support, especially from the EU, as expressed by both institutional actors, experts and citizens.

1. Institutional Reform and Rule of Law

Across all interviews and focus groups, participants highlighted justice reform, institutional independence, and the depoliticisation of state bodies as critical. While the EU's support—particularly for judicial vetting and the establishment of SPAK—was widely acknowledged, several experts pointed out that these reforms are often **incompletely implemented or politically co-opted**.

Recommendations included:

- More consistent EU monitoring of judicial reform outcomes, not just legislative compliance.

- Stronger support for anti-corruption mechanisms and independent oversight bodies.

- Targeted technical assistance in capacity-building, especially in procurement and competition oversight.

- One academic expert summarised it bluntly: *The EU must go beyond formalities. Help us protect reforms from being hijacked.*

2. Civic Education, Media Literacy, and Democratic Culture

Many respondents argued that Albania's democratic fragility is rooted not just in elite manipulation but also in **citizen disengagement**. Both focus groups emphasised that disinformation, political cynicism, and media partisanship are fuelling apathy, especially among young people.

Suggested interventions included:

- Civic education curricula on democratic values and media literacy, embedded in schools and universities.

- Support for independent media and fact-checking platforms.

- EU-backed programmes for youth participation, including Erasmus+ and localised deliberative forums.

- These priorities align closely with the mapping, which highlighted declining trust in media and the impact of foreign-sponsored narratives.

3. Cybersecurity and Hybrid Threat Resilience

The 2022 cyberattack attributed to Iran was seen as a wake-up call. While Albania has since passed new cybersecurity legislation, many interviewees warned that **technical readiness remains uneven**, and institutional coordination is weak.

Respondents recommended:

- Operationalising the national cybersecurity strategy with external audits and technical mentoring.

- Participating in EU and NATO joint cyber response exercises.

- Running public awareness campaigns and digital hygiene training in schools.

4. Youth Engagement and Migration Prevention

Brain drain was repeatedly identified as a major vulnerability—not just economically, but in terms of democratic and social resilience. Experts and citizens linked emigration to **underemployment, clientelism**, and the lack of opportunities outside Tirana.

Actions proposed include:

- Expanding entrepreneurship support for youth, particularly in green and digital sectors.

- Creating diaspora returnee programmes with reintegration incentives.

- Investing in rural digitalisation and economic hubs outside the capital.

- This echoes findings from the mapping exercise that flagged migration as both a symptom and a driver of systemic fragility.

5. Strategic Communication and Local Visibility of the EU

While the EU remains Albania's most positively viewed external actor, its **presence is often perceived as distant or abstract**. Citizens in focus groups reported greater visibility of Turkish and Chinese projects, which are often more localised and visibly branded.

Recommendations included:

- Tailoring EU communications to local languages, channels, and community needs.

- Promoting visibly tangible projects (clinics, schools, infrastructure) tied to the EU brand.

- Reframing conditionality not as technocratic compliance, but as a tool of public empowerment.

6. Support for Cross-Sector Networks: CSOs, Academia, and Media

A recurring concern across expert interviews was the **shrinking civic space** and the disconnect between knowledge production and policymaking. Several respondents highlighted how independent actors in civil society, research, and media often work in silos or lack sustainable support.

Recommendations included:

- Ensuring direct EU funding for grassroots organisations, avoiding reliance solely on centralised intermediaries.

- Building platforms for CSO-academia-media consortia to collaborate on evidence-based advocacy.

- Providing policy translation and communication training to help research influence reform more directly.

- Across these areas, three major themes emerged from the fieldwork:

  o **Conditionality vs. Legitimacy**: EU conditionality is still valued but is losing transformative power unless paired with public legitimacy and real consequences for political non-compliance.

  o **Security-Democracy Nexus**: Cybersecurity, media regulation, and economic transparency are now recognised not just as technical fields, but as democratic infrastructure.

  o **Support Fatigue**: There is growing concern that repeated technical assistance without visible systemic change is generating cynicism—particularly among youth and reform-minded professionals.

  o These findings underline the need for EU and international engagement in Albania to be not only strategic, but **locally credible, clearly communicated, and more visibly connected to citizens' lived experiences**.

1.7. Conclusion

This Albania Country Report presents an overview of how external actors are perceived in shaping the country's political, socio-economic, and security landscape. Drawing from both the mapping of existing studies and original fieldwork—including expert interviews and focus group discussions—the report reflects a broad alignment with Euro-Atlantic institutions, while also revealing growing concerns about the pace, consistency, and domestic impact of reform.

Tensions Between Strategic Alignment and Implementation Gaps

The findings point to a recurring tension between Albania's formal commitment to Euro-Atlantic integration and domestic challenges in governance. While the EU, NATO, and the US continue to be viewed as key partners in security and development, several interviewees expressed concern that political elites rely heavily on international legitimacy, often without demonstrating equivalent commitment to internal accountability. Reforms are frequently adopted in form but not in substance, leading to limited citizen trust in their long-term effectiveness.

There is also a noticeable disconnect between political rhetoric and everyday realities, particularly among younger citizens. While strategic orientation is not in question, the perceived lack of institutional responsiveness and transparent implementation contributes to growing public apathy and outmigration, particularly among skilled youth.

1.7.1. Perceptions of Other External Actors

Although Albania maintains a strong pro-Western orientation, the presence of other foreign actors remains significant. These actors—particularly Türkiye, China, Russia, and Iran—do not operate through overt influence alone but rather engage through cultural, economic, informational, and political channels. The United Arab Emirates has also emerged as an influential actor, extending its role through investments in strategic assets such as ports and providing surveillance technologies, highlighting the growing complexity and diversity of external interests in the country (AL60, 2025; AL642025). Turkish and Chinese investments are often regarded as pragmatic and efficient, especially in infrastructure and education, while Russia and Iran have been associated more with hybrid threats, including disinformation and cybersecurity breaches.

These forms of engagement are often interpreted as filling institutional voids or responding to delayed or overly technocratic Western assistance. While most respondents did not question Albania's Western trajectory, they expressed concern that alternative actors may gain influence when Western engagement is perceived as inconsistent, conditional, or distant from local realities.

1.7.2. Entry Points for Strengthening Resilience

The fieldwork identified several areas where institutional and civic resilience could be reinforced. Albania's young population presents opportunities for civic engagement and innovation, especially if supported through inclusive education and employment policies. Civil society, academia, and the media remain active, although many respondents noted challenges such as reduced access to funding and the risk of political co-optation. The EU integration process and NATO membership continue to provide important frameworks for

policy alignment and reform leverage, but their impact depends on credible implementation and strong local buy-in. Additionally, Albania's diaspora community holds untapped potential for investment and civic contribution, which could be better mobilised with improved legal and institutional support.

While these entry points exist, most respondents acknowledged that the space for meaningful change is constrained by persistent issues of clientelism, weak institutional coordination, and political fragmentation.

Across interviews and focus groups, respondents showed a high level of awareness regarding external and internal vulnerabilities. Military threats were viewed primarily in terms of regional spillover or symbolic vulnerability, rather than as a risk of direct confrontation. Socio-economic concerns focused on corruption, emigration, underemployment, and the limited institutional capacity to retain talent. Political threats, seen as the most pressing, included elite capture of institutions, electoral disengagement, and the declining independence of media.

- Military threats were seen primarily in terms of regional spillover or symbolic vulnerability, rather than direct confrontation.

- Socio-economic concerns centred on corruption, emigration, underemployment, and limited institutional capacity to retain talent.

- Political threats—seen as the most pressing—included elite capture of institutions, electoral disengagement, and declining media independence.

These issues were often described as interconnected, forming a cycle in which socio-economic hardship fuels political disillusionment, which in turn creates openings for foreign influence and weakens democratic accountability.

Albania's strategic orientation remains clear. The EU and NATO continue to enjoy strong public support and are widely seen as the preferred frameworks for security and development. However, public trust in the domestic implementation of these partnerships appears fragile. There is growing concern that political reforms are uneven, and that citizens are not consistently included in processes that are formally intended to serve them.

The report finds that perceptions of external actors are not static but conditional, shaped by delivery and credibility. In this context, the EU and its partners face a key challenge: how to align strategic priorities with local expectations in a way that reinforces democratic institutions and public legitimacy. Respondents emphasised that external support must not replace local agency but rather support the conditions under which it can thrive.

While no single actor dominates the influence landscape, gaps in domestic governance and uneven Western engagement create space for alternative narratives and partnerships. The task moving forward is to ensure that Albania's Euro-Atlantic integration is not only maintained at the diplomatic level but also made tangible, inclusive, and accountable at the societal level.

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1.8.1. List of interviews

Interviewee code	Affiliation	Place and Date
AL58	Civil Society activist with knowledge on democracy consolidation	Tirana, 17.*03.2025*
AL59	Government official with knowledge on defence	Tirana, 17.*03.2025*
AL60	Former minister	Tirana, 18.03.2025
AL61	Civil society activist	Tirana, 18.03.2025
AL62	Academic	Tirana, 17.03.2025
AL63	High ranking government official with knowledge on EU integration	Tirana, 17.03.2025
AL64	High ranking government official with knowledge on EU integration	Tirana, 18.03.2025
AL65	Private sector	Tirana, 17.03.2025
AL66	Expert with knowledge on security	Tirana, 17.03.2025
AL67	Professor of economics	Tirana, 18.03.2025
AL203	Researcher Security and international relations	Tirana, 25.04.2025
AL204	Professor of Social Sciences at the University of Tirana	Tirana, 14.05.2025
AL205	Expert on Security and international relations	Tirana, 15.04.2025
AL206	Expert on media governance	Tirana, 28.03.2025
AL207	Economics expert	Tirana, 28.03.2025
AL208	Private sector and economics expert	Tirana, 16.04.2025
AL209	Journalist	Tirana, 11.04.2025
AL210	Expert on EU integration	Tirana, 17.04. 2025

1.8.2. Focus Group Discussions

Focus Group Discussion	Group	Place and Date
Focus Group Discussion with experts	Experts from academia, civil society, and journalist	Tirana, 17.03.2025
Focus Group Discussion with citizens	Miscellaneous	Tirana, 21.03.2025

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2. BOSNIA AND HERZEGOVINA

Mirza Buljubašić

2.1. Introduction

This report analyses how domestic actors in Bosnia and Herzegovina (BiH) perceive external influence and how those views intersect with local challenges in governance, institutional resilience, social fragmentation, and development. It draws on fieldwork carried out in March and April 2025 under the REUNIR programme and relies on interviews and focus groups across government, civil society, media, academia, and the broader public.

BiH is a telling case because the Dayton Peace Agreement left the country under pronounced international oversight through the Office of the High Representative, EUFOR troops, and a long sequence of Western reform packages. Most interlocutors now regard these guardians as largely symbolic. Years of EU-led state building have yielded poor results – BiH remains "dysfunctional for its citizens but not for its politicians," as EU partners often prioritise stability over reform (Bassuener, 2021). The constitution's ethnic power-sharing formula, combined with persistent domestic obstruction, has produced a fragile system in which foreign actors both underwrite security and, in many citizens' eyes, shield entrenched elites. The Sejdić and Finci, among others, ruling underscores structural discrimination within the post-Dayton framework that undermines democratic representation (*Sejdić and Finci v. Bosnia and Herzegovina*, App. No. 27996/06, Eur. Ct. H.R. 2009).

Regional patterns of democratic erosion and civic fatigue merge with BiH's war legacies and fragmented institutions. Interviewees describe international engagement with mixed feelings: necessary for baseline stability yet often incoherent, selective, and easily exploited by local spoilers. Serbia and Croatia are seen as intrusive patrons, Russia and Türkiye as opportunistic partners, while the EU and NATO appear weary or hesitant. According to an International Republican Institute survey, 94 % of Serbs in BiH view Russia favourably, compared to only 13 % of Bosniaks. This stark divergence underscores how ethnic affiliation shapes attitudes toward external powers (Bechev, 2024).

Multi-level governance, overlapping legal mandates, and pervasive patronage mean that external aid frequently bypasses genuine local needs. Trust in both domestic and international institutions has plummeted, fuelling political apathy and a steady outflow of skilled citizens. Over the past decade alone, more than 400 000 Bosnians emigrated, and by 2020 an estimated 1.7 million BiH citizens were living abroad (roughly one-third of the population) (UNDP, 2024).

2.1.1. Methodology

Fieldwork (Mar–Apr 2025) combined 23 elite interviews and three focus-groups to map perceived political, socio-economic and security threats. A total of 23 expert interviews were conducted with respondents selected for their thematic and institutional expertise in the areas of governance, security, economics, foreign affairs, civil society, academia, and the media. Respondents included professors, journalists, public officials, NGO leaders, military analysts, and private sector experts. Interviews followed the standardised REUNIR

interview guide and were designed to explore perceptions of internal and external political dynamics, democratic erosion, institutional integrity, foreign influence, and societal responses to fragmentation. Interviews were conducted predominantly in person, with several held online due to travel or scheduling constraints. Each interview lasted between 45 and 90 minutes, was audio recorded with participant consent, and subsequently transcribed. Data were analysed thematically using a grounded approach. Where participants agreed, quotes are attributed by name; otherwise, quotations are anonymised or described by role.

Three focus groups were conducted to broaden the empirical base and capture perceptions from beyond elite circles. The first, held in Sarajevo, included citizens (n = 7) such as students, a telecommunications engineer, a war veteran, and a former public servant. The second, held in Banja Luka, gathered NGO representatives, journalists, legal professionals, and analysts (n = 6). The third, conducted in Sarajevo, brought together academic, media, security, and civil society experts in a structured roundtable format (n = 6).

This methodology ensured the triangulation of findings across geographic locations (Sarajevo, Banja Luka), professional sectors (academia, media, civil society, public service), and societal levels (experts and citizens). By combining focus groups and in-depth interviews, the study captured both vertical (institutional) and horizontal (civic) understandings of external actor influence, institutional dysfunction, and sources of democratic resilience. The diversity of respondents and open-ended structure of engagement allowed for the emergence of unexpected themes and deeper insights into Bosnia and Herzegovina's internal and external political dynamics.

2.2. Perceptions on External Actors in Bosnia and Herzegovina

2.2.1. Context

The current political and institutional climate in BiH, as portrayed by the experts and participants interviewed for this study, is marked by persistent structural fragmentation, elite entrenchment, and a deep erosion of public trust. Many respondents emphasised that these dynamics cannot be understood in isolation from the influence of external actors. Rather than acting as stabilising forces or normative anchors, all external actors are frequently perceived as either complicit in sustaining the status quo or opportunistically exploited by domestic political elites. Across interviews, a recurring motif was the systemic inertia that allows dysfunction to reproduce itself across political cycles, institutions, and even generations.

Several interlocutors pointed to the enduring logic of the Dayton Peace Agreement as the foundational source of dysfunction. One respondent described Bosnia and Herzegovina as a society that, even thirty years after the war, has not managed to ascend the first step of meaningful political transformation. "Because we are a closed society that functions according to almost mafia-like patterns," observed a scholar from Banja Luka (BA113, 2025). This perspective challenges more simplistic readings of inter-ethnic tension as a primary threat, reframing political competition as performative and underwritten by shared interests in resource capture and power retention. This aligns with earlier analyses that highlight how the Dayton structure has

entrenched a consociational logic that rewards ethnic elites and disables functional governance (Belloni, 2009).

This nationwide survey (authored by a Bosnian research team under USAID's MEASURE-BiH project) offers hard data on public perceptions of governance and foreign influence. It reveals an alarmingly negative outlook: 86 % of Bosnians in 2016 believed the country was moving in the wrong direction (only ~11 % said "right direction"), indicating broad frustration with domestic conditions. Citizens reported low satisfaction with government services and rampant distrust in political actors. The report also highlights a stark ethnopolitical divide in attitudes toward international actors: while a strong majority in the Federation (around 70 %) *welcomed* active engagement by the international community in BiH, only 21 % in Republika Srpska felt the same. Likewise, support for EU/NATO integration was much higher among Bosniaks/Croats than Serbs. These findings underscore how institutional dysfunction and ethnic patronage have bred public cynicism and apathy (e.g. low voter turnout), as well as polarised views of external influence. Notably, the data show most citizens prioritise economic development and anti-corruption efforts, aligning with other reports of stagnation and graft (Carsimamović Vukotić et al. 2017).

The connection between governance dysfunction and private interests was further underscored by a scholar and expert from state institutions, who described corruption as the principal threat to institutional resilience: "The number one problem in BiH is corruption. It is not religion, it is not ethnicity, it is corruption that is present in every pore of society" (BA101, 2025). In his account, even reforms formally aligned with the EU integration process—such as legislation on public asset declarations—are actively obstructed or hollowed out during implementation. The problem, they emphasised, is not the wording of the laws, but the complete absence of political will to enforce them in a way that would disrupt elite privilege. Surveys reinforce this perception – nearly 1 in 3 public service users in BiH report paying a bribe in the past year (Transparency International, 2020). Bosnia scored 34/100, placing it among the worst in Europe (only slightly above Albania and on par with some Central Asian states). TI BiH reports that corruption is present "in every pore of society," from high-level graft to daily bribery. Public opinion data from TI's Global Corruption Barometer echo this: a vast majority of Bosnians believe government officials are corrupt and that there is state capture by political and private interests. TI has highlighted the political interference in the judiciary as a key problem – for instance, appointment of judges and prosecutors is heavily politicised, leading to near-impunity for elite corruption. Notably, Bosnia has seen almost no convictions of high-level officials for corruption in the past decade, which TI and EU observers cite as evidence of an entrenched culture of impunity (European Commission, 2023).

Many respondents also reflected on the asymmetric and often informal influence of neighbouring countries, particularly Serbia and Croatia, in the internal affairs of BiH. These influences, they noted, are not just cultural or symbolic but have a concrete impact on the country's political dynamics and legislative outcomes. As a scholar from Banja Luka remarked, "Serbs lean on Serbia, Croats on Croatia, and Bosniaks are in a weaker position because they have no formal patron" (BA113, 2025). BA101 echoed this concern, stating that the constitutional framework itself, with its tripartite power-sharing structure, enables certain political actors to "fulfil the wishes of our neighbours", resulting in situations where "their interests in BiH often become more important than the interests of BiH itself" (BA101, 2025). Such alignments are part of broader regional

dynamics in which neighbouring governments project soft and hard power into BiH's institutional life, a trend documented by scholars examining the rise of authoritarian politics in the region (Bieber, 2020).

Yet, within this landscape, several interviewees identified moments that could signal institutional resistance or reassertion of the rule of law. BA101 cited the initiation of high-profile prosecutions (such as those against politician Milorad Dodik) as a potential shift in state posture, including cases involving both corruption and attacks on constitutional order. "These are all messages… a message that you cannot destroy the constitutional order… it could be a turning point: either there will be a state, or there will not be a state" (BA101, 2025). His view reflects cautious optimism that state institutions may yet reclaim some normative ground, but only if these moves are sustained and perceived as legitimate.

Other participants, however, were more sceptical, emphasising the lack of political alignment and democratic capacity needed to support such shifts. A scholar described the country's legislative system as one in which power is exercised by a numerical minority under the guise of democratic legitimacy: "We have a legislative authority formed by 25–30 % of the electorate, and then it acts as if it has majority legitimacy" (BA113, 2025). This disconnect between electoral representation and institutional authority, they argued, reproduces cynicism and feeds public disengagement.

The cumulative effect of these dynamics is a profound sense of resignation among citizens. Respondents frequently referred to survivalism, transactional politics, and a depoliticised public sphere. "The democratic process for most citizens boils down to a bag of basic groceries," noted scholar (Interview with BA113). "That's a transaction, not democracy," they added. In the Banja Luka focus group, participants expressed a similar disillusionment. One noted that "people are withdrawing, they no longer want to waste their time… politics is a circus", while another commented, "the media just spread fear and division – there is no one left you can trust" (Focus group with experts, 18.03.2025, Banja Luka). These narratives underscore a shift from critique to withdrawal, where the perceived futility of engagement breeds political apathy.

In one focus group, a participant remarked that "foreigners talk about reforms, and our politicians laugh behind their backs while dividing the spoils" (Focus group with experts, 18.03.2025, Banja Luka). This sentiment captures a growing belief that international involvement is either ineffectual or complicit in maintaining existing power structures.

Some institutional experts expressed deep cynicism regarding the motivations of Western actors. "They are not here to help," one respondent argued, "they are here to protect their own interests—economic, geopolitical, military. We are a buffer. Nothing more." (BA101, 2025) There was notable frustration with donor-led reforms perceived as detached from BiH's realities. One state official critiqued this as "colonial administration'—top-down frameworks that may work in Scandinavia but are misaligned with local systems and needs" (BA101, 2025). Some respondents, particularly in focus groups, drew a contrast between Russia and the EU—not to endorse Russia, but to highlight the EU's inconsistency. "At least Russia does not pretend. You know what you are getting. EU comes with slogans, then disappears" (Focus group with experts, 21.03.2025, Sarajevo). Despite formal progress, financial times commentaries warn that Bosnia's reforms may be superficial, with risk that EU leverage is guided more by geopolitics than democratisation (The Financial Times, 2024).

One expert argued that the Russian Federation uses Republika Srpska as a geopolitical lever, aiming not for direct economic gains but for regional destabilisation. "Russia shows that it has the capacity to destabilise the periphery of Europe," they explained, adding that Serbia and Hungary act as amplifiers of that influence in Bosnia and Herzegovina, particularly through overt support for challenges to the country's constitutional order (BA99, 2025).

Perceptions of Türkiye were more diffuse, shaped primarily by cultural affinity and historical ties rather than strategic depth. While Türkiye's visibility was noted in religious and symbolic domains—such as support for Islamic institutions, mosque construction, and cultural diplomacy—its influence was generally perceived as uneven and less consequential in high-stakes political negotiations. "In BiH, Türkiye plays a cultural and religious role, but in North Macedonia or Serbia it is all about economics—construction, logistics, big capital," respondent explained. They emphasised that Turkish diplomacy is more visible in Sarajevo, but its strategic depth is often underestimated in Brussels (BA97, 2025).

In other words, Türkiye's footprint inside BiH is chiefly cultural and religious, whereas its economic and geopolitical reach elsewhere in the Western Balkans gives Ankara far greater leverage in EU deliberations. Recognising this distinction helps reconcile local perceptions of Türkiye as a "symbolic" actor with EU worries about its broader strategic depth.

Several respondents contrasted Türkiye's role in BiH with its presence in countries like North Macedonia or Serbia, where it was seen as a more assertive economic actor. In BiH, by contrast, Türkiye's footprint was described as largely symbolic and its political engagement as sporadic.

China was rarely mentioned in the context of political or security threats but emerged in discussions of economic entanglement and soft influence. Respondents described a pattern of non-transparent investment projects, especially in infrastructure and energy, which were viewed as reinforcing existing clientelist structures. While China was not framed as a direct geopolitical actor, several interviewees expressed concern over its long-term economic leverage and the absence of oversight in bilateral agreements. One expert referred to this as a form of "invisible entrapment", noting that China's economic footprint in BiH was growing quietly and without significant public debate.

Civic trust appears not only fractured but exhausted. "We do not trust anyone anymore. Local or foreign. They just play their games and we are stuck," said one focus group participant, summing up a widely shared sentiment (Focus group with experts, 21.03.2025, Sarajevo). The contextual landscape in BiH—as reflected through interviews and focus groups—is one of entrenched political stagnation, interlinked domestic and foreign influences, and widespread societal fatigue. The perceptions of external actors are deeply shaped by this environment: not simply as external observers or enablers of change, but as active participants in a system marked by selective accountability, deferred reform, and eroding public faith in both domestic and international institutions.

2.3. Military Threats, Opportunities and Resilience

While few respondents viewed BiH as facing an imminent, conventional military threat, many stressed that the conditions for conflict escalation remain structurally embedded in the country's constitutional setup and

political dynamics. Threat perceptions were framed less in terms of foreign aggression or armed insurgency, and more as stemming from internal sabotage, legal fragmentation, and the delegitimisation of state security institutions. Respondents frequently expressed concern over the erosion of institutional checks, the fragility of command structures, and the symbolic instrumentalisation of militarism by political elites, especially in the entity Republika Srpska.

These perceptions were echoed in a separate expert focus group, where participants highlighted the symbolic erosion of security through paramilitary-style posturing and the state's failure to respond. "Potential for conflict has always existed in BiH—it fluctuates but has been present since 1995. The fear is now very strong." (Focus group with experts, 21.03.2025, Sarajevo). Additional insight from the March 2025 expert focus group further highlighted the hybrid threat landscape. "Telegram groups directly supported by Russia claim war in BiH is inevitable," one expert noted, emphasising that such content reaches over 500 000 users across the region. "This becomes a narrative read by people with extreme worldviews," another added. Analysts likened Russia's role in BiH to its activities in Crimea and Ukraine: "Russia is doing here what it has done in other places," citing the presence of groups like the Night Wolves in entity Republika Srpska to promote Russian values and conduct illicit business networks with Dodik. Others believed that Russia deliberately maintains a tense status quo: "They would rather keep the country hostage for 20 years than risk one explosive incident like Kosovo—Dodik wouldn't survive that" (Focus group with experts, 21.03.2025, Sarajevo). BiEPAG has warned that such strategies reflect deliberate attempts to weaken democratic institutions in the Western Balkans, using Republika Srpska as a conduit for geopolitical leverage (Kmezic & Bieber, 2017).

Drawing on historical analogies, one geopolitics expert observed: "The division of Bosnia and Herzegovina is obviously in the minds of Zagreb politics, because the security of the EU seems to be less of a priority." They warned that, hypothetically, "Russian launch pads could be 70 km from Zagreb or 150 km from Vienna," if entity Republika Srpska were to fall fully under Russian control (BA82, 2025). Multiple respondents described how local elites use foreign actors as leverage in domestic bargaining. "Dodik doesn't care about Russia ideologically—he uses it tactically," said one analyst. "The moment it stops working for him, he'll pivot. Same with Čović and the EU. It's not about ideology. It's about control." (BA82, 2025)

Despite divergent views on the likelihood of open conflict, the public's fear is tangible across both entities. As one expert put it: "People are afraid in both the Federation and Republika Srpska." The visible protection Dodik receives from Republika Srpska police units exacerbates these fears. At the same time, others pointed to psychological coping strategies: "We console ourselves with the idea that there is no money or capacity for conflict, unlike the 1990s" (Focus group with experts, 21.03.2025, Sarajevo).

Experts also questioned the deterrence capacity of EUFOR, describing it as largely symbolic. "There are still a lot of weapons. People are armed... Who is going to stop that? Certainly not EUFOR." Analysts have repeatedly questioned the symbolic nature of EUFOR, arguing that its limited mandate and scale offer little deterrence in the face of internal destabilisation (Bassuener, 2021). Other respondents criticised the broader overreliance on international actors: "We rely too much on others—for example, EUFOR—while peace [civil society] organisations are also quiet" (Focus group with experts, 21.03.2025, Sarajevo). Independent policy monitors have warned that EUFOR's troop levels are insufficient to guarantee peace and security in BiH should a serious security challenge arise (Bassuener, 2022).

An official from a security institution, cautioned that "coordination between agencies is mostly formal, but fails when real threats emerge" (BA108, 2025). They noted that entity-level institutions often ignore or obstruct decisions at the state level, particularly in Republika Srpska, where leaders publicly contest the legitimacy of joint institutions. These legal and administrative moves are perceived as deliberately weakening the command integrity of BiH's Armed Forces and undermining preparedness. "When the security system starts functioning under entity laws rather than state ones—that's no longer defence, that's dismantling" - said state security expert (BA108, 2025).

One respondent described the threat as "a structure with a head, body, and tail"— a coordinated system where Dodik, Serbian World ideologues, and Russian strategic aims operate as interlinked actors rather than isolated forces (BA104, 2025). Others called this a "smart power" strategy that recruits youth clubs, church networks and charities. "This is not militarisation in the classic sense, but it prepares the ground for it," they argued (Interview with BA95). Others described these patterns as a form of "institutional militarisation" without weapons. A scholar stated that "war doesn't start with tanks, it starts with laws that destroy the state from within" (BA113, 2025). Several respondents framed this process as an evolving security crisis—legal, constitutional, and administrative—that does not manifest in visible violence but carries long-term destabilising effects. An economics scholar argued that "destabilisation comes quietly—it is not spectacular, but it is systemic" (BA107, 2025).

One interviewee highlighted another dimension of concern: the training of BiH cadets in Serbian military academies. "While it is legal on paper, the symbolic message is clear: young officers are socialised into a security paradigm that is not anchored in BiH's constitutional framework," they warned (BA112, 2025).

As noted by a security official in Sarajevo, "the greatest security risk is no longer weapons but information" (BA85, 2025). This aligns with broader perceptions that hybrid threats—especially disinformation—have become key instruments of destabilisation, often more effective than traditional security threats. When asked about external threats, many pointed to the role of Serbia, though few viewed Belgrade as a direct military actor. Instead, Serbia was described as a discursive sponsor of Republika Srpska's exclusionary narratives. "Vučić doesn't need to say anything—just release a photo from the barracks and Dodik knows what to do," commented one Banja Luka focus group participant (Focus group with experts, 18.03.2025, Banja Luka). Respondents consistently emphasised that these signals, often symbolic or rhetorical, contribute to a sense of ambient insecurity, particularly in mixed communities or regions with recent conflict memories.

Several interlocutors linked secessionist threats directly to impunity and state capture. One respondent stated, "Dodik adopted these laws because they were actually convicted at the court of Bosnia… Now they are trying to make them illegal in Republika Srpska." They emphasised that the weakening of central judicial authority is a tactic to shield political elites from accountability (BA96, 2025).

At the same time, several interviewees noted that the real military threat may lie in the deliberate hollowing out of BiH's own defence capacity. As one scholar put it: "The real problem isn't from outside, it is from within—you have military structures that no one takes seriously or trusts" (BA106, 2025). This was echoed by multiple participants who questioned whether Armed Forces of BiH could function in a coordinated way under real duress, given the persistent nationalist contestation of the chain of command.

Despite these concerns, opportunities for resilience and security reform were not absent from the discussion. Some participants pointed to the existing framework of international oversight, particularly NATO's ongoing engagement with BiH, as a potential stabilising factor. Although public confidence in Western actors has waned in political matters, security cooperation—especially training and joint exercises—was still viewed as a potential safeguard. "NATO still has credibility on the ground—at least among professionals," said one Sarajevo-based security official (BA108, 2025). However, this was often framed as a narrow window of opportunity that is closing as geopolitical attention shifts elsewhere.

Another recurring theme was the potential to build bottom-up forms of resilience, particularly in areas less politicised than conventional defence. Several interviewees pointed to civil protection systems, disaster response units, and municipal emergency services as underused, but potentially depoliticised platforms for rebuilding inter-entity trust. "When a flood comes, they forget who's Bosniak, who's Serb—those situations build trust," noted a scholar (BA106, 2025). Strengthening these structures, participants argued, could provide an alternative entry point into more meaningful security sector reform.

It was further noted that infrastructure projects, such as the planned Trebinje airport near the Croatian border, also carry latent military significance. "It is positioned to be usable for civil and military purposes and raises legitimate concerns about cross-border security implications," one expert explained. Concerns were raised that some infrastructure developments may be financed and positioned in ways that align more with geopolitical interests of neighbouring states (e.g., Serbia, Croatia) or third-country actors (e.g., China, Russia), than local economic needs (BA85, 2025).

As security expert warned: "You can have all the weapons, but without loyal, depoliticised institutions you are still vulnerable." Restoring such cohesion, he and others argued, hinges on merit-based appointments and joint training across entity lines (BA85, 2025). The question of public resilience also elicited reflective responses. BA104 remarked that the population's psychological immunity to militarised mobilisation is stronger today than in the past. "People do not fall for those war stories like before… but that does not make them resilient, just tired" (BA104, 2025). Similarly, a sociology scholar described youth as largely indifferent to militarised narratives, seeing them as part of a cynical cycle of manipulation: "For them, war is a tool, not a threat—a tool to keep everything else from changing." (BA110, 2025)

Finally, some saw opportunity in the fact that the absence of real militarisation is itself a public norm. One Sarajevo focus group participant noted: "War is not desired. No one speaks of it gladly. And even when they do, it is to scare, not to mobilise." (Focus group with experts, 18.03.2025, Banja Luka) While this may reflect a fragile peace built on exhaustion rather than reconciliation, it nevertheless shapes the political calculus of actors contemplating escalation. In summary, perceptions of military threats in BiH are embedded in a landscape of constitutional degradation, elite manipulation, and externally reinforced division. Yet amidst this, respondents also articulated forms of resilience rooted in historical memory, pragmatic deterrence, localised trust, and narrowly sustained international frameworks. The resilience is not uniformly robust, but neither is it absent—it emerges not from strategic design, but from collective memory, civil fatigue, and isolated institutional islands that still function across political divides.

2.4. Socio-economic Threats, Opportunities and Resilience

Perceptions of socio-economic threats in BiH are shaped by a profound sense of structural stagnation, elite mismanagement, and the long-term consequences of unresolved postwar political arrangements. Across interviews and focus groups, respondents described a society where economic vulnerability is both a product of dysfunctional governance and a deliberate tool of political control. Socio-economic insecurity, rather than being episodic or crisis-driven, was framed as a normalised condition—a state of permanent instability that is managed rather than resolved.

A recurring theme was the absence of strategic economic planning. BA107 emphasised that BiH lacks any coherent development vision: "We do not have a single national strategic document with real goals and mechanisms. It is all just putting out fires." (BA107, 2025) According to BA107, political actors across entities prioritise short-term political survival over long-term investment, resulting in a fragmented and reactive policy landscape.

"You have people who have sat in the same positions for twenty years without evaluation... everything operates along kinship and party lines" (BA106, 2025). The entrenchment of party-based hiring, particularly in state-owned enterprises, was seen as one of the most corrosive forces preventing innovation and institutional renewal. A scholar noted that "corruption leads to incompetent people in key positions and opens the door to external manipulation. One recent survey found bribery reported by 30 % of public service users. Foreign actors exploit this environment by offering non-transparent investments that bypass accountability structures" (BA91, 2025). This reflects broader regional trends in which corruption functions as a political resource rather than a pathology, a dynamic central to Mungiu-Pippidi's framework on control of corruption (2015).

The strategic manipulation of public enterprises was also highlighted as a means to secure electoral dominance through employment-based patronage (BA86, 2025). Economic experts highlighted a growing pattern of populist decision-making, such as uncoordinated wage increases or regionally inconsistent laws, which exacerbate investor uncertainty and diminish reform credibility (BA106, 2025). Focus group participants described how these socio-economic failures have led to a general collapse of trust in institutions. Survey data from 2022 show that only 10–11 % of Bosnians trust state or entity governments, and a mere 7 % trust political parties (USAID BiH, 2022). Plummeting institutional trust corroborates the report's observation that citizens feel "no one works in their interest. "People no longer believe that anyone works in their interest," said one participant from Banja Luka (Focus group with experts, 18.03.2025, Banja Luka). Another added: "Every salary is tied to a party. If you are not 'one of theirs', you have neither a job nor a future." This widespread perception of exclusion has contributed to what several respondents described as a culture of resignation, in which survival strategies replace civic expectations.

Citizens increasingly adapt their economic behaviour to perceived instability. As one economic scholar observed, "people are postponing home purchases because they fear the country could erupt tomorrow" (Interview with BA106). Such anticipatory coping strategies illustrate how economic insecurity is shaped not only by structural conditions but also by ambient political fear.

Respondents consistently linked these domestic problems to a broader pattern of brain drain and youth emigration, with many describing this as the most serious long-term threat to the country's sustainability. As a sociology scholar put it: "BiH's biggest problem is not nationalism or even corruption, it is that all the capable people are leaving, and those who stay have already given up." (BA110, 2025) This loss of human capital was not only described in economic terms, but also as an emotional and symbolic depletion. "It is not just workers leaving. People who believed things could change are leaving too," said a participant from the Banja Luka focus group (Focus group with experts, 18.03.2025, Banja Luka). According to the 2022 perceptions survey, 19 % of all Bosnians – and over 40 % of youth – were actively considering emigration (USAID BiH, 2022). This outflow, reflected in respondents' fears for the country's future, supports the report's emphasis on emigration as an existential socio-economic challenge. Indeed, FES finds youth turnout and participation in formal politics to be very low: less than 1 in 10 youths are active in any political or civic initiative. However, the report also notes some constructive civic tendencies: for example, while traditional political participation is low, pockets of youth engage through NGOs, volunteerism, or protests on specific issues (environment, justice). Still, the overall picture is that *depoliticisation* has set in – a sense of collective powerlessness. The study links this to the entrenched patronage system: young people see politics as a "closed game" dominated by party loyalists, leading them either to disengage or plan to emigrate (Osmić et al. 2024).

Another expert underscored emigration as a long-term structural threat to BiH's security and viability: "The departure of moderate citizens, the aging population, and the arrival of foreign workers without integration mechanisms are shaping a future crisis—socially, economically, and culturally," they said. "We are not prepared institutionally or psychologically for this shift" (BA99, 2025). Experts in a focus group also stressed the concrete economic toll of political instability. One participant stated: "Loss of foreign investment due to [Milorad] Dodik's secessionist statements. A concrete example is the pharmaceutical industry." Others warned that "if this unstable situation continues, it will also affect tourism" (Focus group with experts, 21.03.2025, Sarajevo). Experts also cautioned against the overburdening of civil society in a dysfunctional governance context: "Civil society cannot continue to assume the role of the state – what we have is an unhealthy civil sector that needs more collaboration" (Focus group with experts, 21.03.2025, Sarajevo).

Several participants pointed to corruption as both a driver and symptom of socio-economic instability. BA101 was unequivocal: "corruption is the only system that works. Everything else is an illusion" (BA101, 2025). They described a closed political economy in which public contracts, employment, and even international development funds are recycled through clientelist networks. This view was widely shared, with some interviewees noting that even international assistance, particularly from financial institutions, tends to be absorbed into elite-controlled structures with little transparency or public impact. One respondent referred to much of the civic programme as "donor theatre"—grant-driven performance with no tangible impact on justice or reform (BA104, 2025).

In the Republika Srpska context, fiscal experts pointed to long-delayed healthcare reforms and systemic inefficiencies in public enterprises as key drivers of financial risk. One official noted that entire mandates pass without structural reform due to geopolitical distractions and crisis management cycles. Technocratic narratives often mask political paralysis. One government insider acknowledged that healthcare and fiscal

reform strategies were 'technically sound' but functioned more as placeholders than action plans—especially during periods of geopolitical distraction (BA114, 2025).

Despite their minimal presence in public discourse, asymmetric trade relationships with non-EU actors—particularly China—emerged as a structural concern. One economist warned of the 'invisible entrapment' posed by long-term deficits and one-sided market exposure (BA107, 2025). While Chinese economic presence was acknowledged, one academic clarified that its influence is "more economic than corrupt," especially in comparison with actors like Türkiye and Russia. They cited examples of power plant investments and noted that "corruption is hard to prove" but can be indirectly seen through the opacity of bilateral deals and contract awarding (BA91, 2025).

Despite these bleak assessments, some interviewees identified sources of economic resilience—though these were generally described as marginal, localised, or dependent on external conditions. For example, an economic scholar noted the relative strength of remittances and informal family support networks: "The diaspora is BiH's biggest investor—not through projects, but through helping families survive" (BA114, 2025). This form of resilience, while stabilising, was also seen as unsustainable in the long run, as more families lose younger members to permanent emigration.

One economist emphasised that diaspora remittances—currently representing over 10 % of GDP—are not only a financial lifeline but also a key factor in monetary stability. Yet the very remittance flows that prop up household consumption also incentivise permanent emigration, accelerating the demographic hollowing that stakeholders identify as BiH's most serious long-term threat. In short, remittances buy short-term stability at the cost of sustainable development. "Without remittances, we would struggle to maintain the currency peg. This is what keeps consumption afloat," they stated. They warned, however, that this form of resilience masks systemic underperformance and creates a misleading sense of sustainability (BA81, 2025). Another respondent stressed the importance of the diaspora in maintaining pro-EU sentiment. "Even when people lose trust in institutions, they still trust their family members abroad. And most of them are in EU countries," they said. They suggested that diaspora channels could be better leveraged in communication strategies and conditionality design (BA81, 2025).

Another economic expert summarised the imbalance starkly: "We are exporting brains and importing debt." This succinctly captures the dual nature of BiH's external dependence—human capital is lost, while financial flows accumulate obligations without systemic reform (BA81, 2025). Others pointed to small-scale entrepreneurship and digital work as underexplored opportunities, particularly among youth. A sociology scholar observed that "there are young people earning more than MPs – but no one helps them, no one sees them" (BA110, 2025). These individuals, they argued, operate outside institutional frameworks and often succeed in spite of, rather than because of, state policy. While these pockets of autonomy were welcomed, this scholar stressed that they are not scalable without systemic reform.

As BA101 noted, digitalisation could transform public administration by increasing transparency and efficiency. However, they warned that resistance is systemic: "We have all the tools to digitalise processes… but we don't use them because it would destroy the current way of functioning." (BA101, 2025). The failure to deploy these tools is not technical, but politically rooted in elite resistance to oversight and public

accountability. According to the 2024 SIGMA assessment by OECD, Bosnia and Herzegovina underperforms across six principles of public administration, particularly in coordination and accountability (OECD, 2025).

In terms of international engagement, views were mixed. Some respondents expressed frustration with donor-driven economic programme, which they saw as detached from local needs. BA107 remarked that "projects come, money is spent, but nothing changes because there's no political framework to support it" (BA107, 2025). Others were more critical, accusing international financial institutions of reinforcing austerity measures that deepen public disillusionment, particularly in health, education, and welfare sectors. The BTI 2022 report provides insight into civil society's role and the nature of citizen activism in Bosnia. It observes that formal civil society organisations (CSOs) often have limited reach among the population. Tellingly, the report notes that major citizen protest movements in Bosnia (like the February 2014 social unrest and the 2018 "Justice for David" protests in Republika Srpska) were "marked by the limited role of formal CSOs", revealing "lack of public trust in civil society organisations". Many NGOs in BiH are seen as donor-driven and disconnected from everyday problems, so when people mobilise, they tend to do so spontaneously or informally. The BTI also comments on the weak capacity of civil society: while there are tens of thousands of registered NGOs, most are small, inactive, or aligned with political factions (e.g. veterans' associations). Coordination between government and genuine civil society is poor, though there have been attempts (a 2017 memorandum) to improve it. In essence, citizens often bypass NGOs and take to the streets directly when outrage boils over, as seen in 2014. But the report warns that Bosnia's complex institutional system makes it "nearly impossible to transform social protest into social change", contributing to public frustration (Bertelsmann Stiftung, 2022).

Focus group participants working in civil society described how volatile donor agendas shape civil society organisation priorities, often distorting mission integrity. "We all became climate experts overnight because that's what the EU was funding last year. This year it is green digital. Next year, who knows" (Focus group with experts, 21.03.2025, Sarajevo). Participants also noted a lack of meaningful feedback mechanisms in donor engagement. "We fill out all their forms, attend their trainings, then they leave. No one asks us what changed," noted one civil society member (Focus group with experts, 21.03.2025, Sarajevo).

Institutional experts such as BA101 underscored a recurring frustration: "They come up with technical solutions, but the problem is not the technology" (BA101, 2025). Without confronting the political incentives that block implementation, foreign assistance risks becoming technocratic ritual rather than transformative support. A few respondents, however, emphasised that external actors still play an essential stabilising role, especially when local institutions fail. A scholar pointed to the EU's post-COVID recovery funds as an example: "Without those funds, many municipalities would have simply shut down" (BA106, 2025). Yet even here, the implementation and transparency of spending were questioned.

One unexpected insight came from an expert from international institutions, who noted that socio-economic grievances are rarely mobilised politically in BiH: "People complain, but they don't demand change. The economy is a private problem, not a political demand" (BA109, 2025). This separation of personal suffering from collective action, they argued, is a direct consequence of long-term depoliticisation and fragmented social identities.

In summary, socio-economic threats in BiH are perceived as chronic, systemic, and intimately tied to political dysfunction. Resilience exists—but often outside the formal state, in family networks, diaspora remittances, or isolated entrepreneurial spaces. Opportunities are present but undermined by lack of strategic vision, pervasive corruption, and a civic culture marked more by resignation than resistance. The gap between external economic support and internal institutional absorption remains wide, and without greater accountability and inclusion, socio-economic insecurity is likely to persist as both a symptom and instrument of elite dominance.

2.5. Political Threats, Opportunities and Resilience

Across interviews and focus groups conducted for this study, political threats were identified as the most serious and structurally embedded risk to BiH's long-term stability. While external actors were seen as relevant, most participants emphasised that the core of the political crisis is internal, manifested in institutional fragmentation, elite collusion, and the performative use of ethno-national identity to block reform. The result, in the words of one participant, is not a failed state, but "a state in a constant state of partial breakdown" (BA109, 2025).

A dominant theme was the persistence of ethno-national veto structures. Multiple respondents described the Dayton constitutional framework not as a postwar compromise, but as a mechanism that incentivises political obstructionism. A scholar was unequivocal in his assessment: "Here you have a minority that, through ethnic keys and institutional blockades, governs the majority… it is an unsustainable system designed never to function" (BA113, 2025). His view was widely shared across both ideological and entity lines.

The behaviour of political elites, particularly in Republika Srpska and Croat Democratic Union BiH, was consistently identified as a threat to constitutional order. Participants across focus groups and elite interviews noted that secessionist discourse, selective institutional participation, and legal dualism have become normalised tools of political negotiation. As one Banja Luka-based participant noted, "Dodik has been talking about secession for ten years. It's no longer a threat—it is a tactic" (Focus group with experts, 18.03.2025, Banja Luka).

BA104 echoed this view: "Dodik is not the problem by himself. The problem is that the system collapsed with him—now everyone pretends the institutions exist, while knowing they do not" (BA104, 2025). Additional concerns emerged from an expert focus group in Sarajevo, where participants described Dodik not only as an obstructionist actor, but as an active destabiliser pushing for an autonomous enclave insulated from legal accountability. One participant warned: "There's a strong chance this threat will materialise—an entity where they won't be held criminally accountable. They do not even care if that's within BiH. It seems he's gone further than they ever expected." Another added, "Dodik has long relied on the support of external actors— Russia or someone else. they got the green light from Belgrade and Moscow." Several participants emphasised that while BiH institutions and international envoys have reacted to provocations, "the EU is now giving a lot of support in dividing our country… trading in material and natural goods," further eroding confidence in institutional redress. These dynamics were viewed as encouraged by silent complicity from the EU and explicit backing from Serbia and Russia.

Respondents also noted that EU actors selectively focus on secessionist threats while underestimating obstructionism by Croat leadership. As one expert warned, "[Dragan] Čović masks obstruction behind pro-European discourse, but this diverts attention from more visible actors like Dodik—and Brussels lets him" (BA105, 2025). Another scholar added that "political elites know how to play the West—they say the right things in Brussels or Washington, and then do the opposite at home. It is a performance of compliance without substance" (BA99, 2025).

In this context, external actors were seen as both enablers and constraints. Several interviewees were sharply critical of the EU's approach to constitutional negotiations and enlargement. A security and international relations scholar argued that "Brussels makes compromises with those dismantling the state—that's not neutrality, it is complicity" (BA105, 2025). This perception aligns with critiques of "stabilitocracy," a pattern in which international actors prioritise short-term stability over democratic transformation, thereby reinforcing the position of illiberal elites (Bieber, 2018). Others expressed frustration with the Office of the High Representative, describing it as inconsistent and reactive, with diminished legitimacy among citizens. At the same time, a few respondents pointed out that OHR actions—particularly around the 2022 election law changes—demonstrated that international influence still matters, albeit in contested ways.

Yet, some respondents criticised the long-term consequences of this interventionism: "Bosnia is captured from two sides: by corrupt politicians, and by an international community that lacks a long-term vision. The Office of the High Representative has extraordinary powers yet has often built up its own capacity rather than the state's—creating a dependency syndrome that undermines domestic ownership" (BA96, 2025).

The political threat landscape was not viewed solely in terms of obstruction or ethnic division. Several participants drew attention to the hidden consensus among elites across ethnic lines, particularly around patronage and impunity. "They argue on TV, but share public procurement deals together" (Focus group with experts, 18.03.2025, Banja Luka). This form of clientelist collusion, described by many as the true architecture of power in BiH, was seen as more dangerous than formal nationalism, because it undermines the very concept of political accountability. Another respondent called this elite network "a machine that runs across ethnic lines " (BA113, 2025).

One expert described how legal amendments are often used to "launder legitimacy" rather than to improve governance. "They use legal channels to make corrupt practices appear institutional. Laws are changed not to improve things, but to allow abuse to continue under a new name," they explained. This tactic illustrates how formal legalism can be weaponised to protect elite interests under the guise of reform.

One participant put it bluntly: "People no longer believe in change through elections. They believe in change through exodus." This view reflects a deep-seated disillusionment with democratic processes, wherein emigration is seen not just as escape, but as the only viable form of agency (BA113, 2025). Another expert said that they know "many brilliant young people who simply do not care anymore. They say: 'Let it burn—I am just here to survive.' That level of disillusionment is hard to reverse". (BA96, 2025).

One critical insight raised by an expert from an international institution was that citizens in BiH do not believe in the political process as a route to change. "Political action is perceived as an illusion. People do not trust the opposition, or change—only that things do not get worse" (BA109, 2025). Participants also noted rising disillusionment with public institutions: "The population is disturbed by the fact that institutions did not react

the way they were expected to." This perceived failure to defend constitutional order was seen as eroding legitimacy and producing widespread civic anxiety (Focus group with experts, 21.03.2025, Sarajevo). This widespread political fatalism was also reflected in focus groups, where participants expressed that voting, protesting, or engaging in policy debates feels symbolically empty. "Everything is already decided. Elections are theatre," said one participant in Sarajevo (Focus group with experts, 18.03.2025, Banja Luka).

The political landscape, as noted by one expert, is further distorted by coordinated media narratives that reinforce ethnic boundaries. "It is not just disinformation—it is agenda setting. Certain outlets will consistently prioritise regional tensions, while ignoring socioeconomic issues," they noted. They emphasised the impact of this coverage on young people who "grow up thinking that conflict is normal and compromise is defeat" (BA88, 2025). The weaponisation of disinformation was raised across focus groups and expert interviews, particularly in Republika Srpska. "This is not just biased media—it is a system. It is financed, structured, and coordinated. People live in an echo chamber," warned one interviewee (BA98, 2025).

The fragility of Bosnia's judiciary and policing architecture was emphasised repeatedly. "The head of SIPA is Dodik's person," one professor explained, referring to the State Investigation and Protection Agency. They warned that the institutional paralysis of SIPA and other state bodies "proves there is no state of Bosnia and Herzegovina" in a functional sense (Interview with BA98). A criminal justice expert echoed this concern, warning that the judiciary is increasingly co-opted into partisan structures. "You have prosecutors and judges openly affiliated with parties—there is no institutional firewall left," they stated. International donors were also criticised for supporting rule-of-law programmes without addressing this institutional capture, which in practice legitimises rather than disrupts elite control (Interview with BA86).

Despite this, some interviewees identified moments of political resilience and democratic potential, particularly in civil society, journalism, and the legal sector. BA101 referred to the initiation of judicial cases against high-level officials as a rare opportunity: "If those who attacked the constitutional order fall—then it will send a message. Either the state begins to return, or we will know it no longer exists" (BA101, 2025). However, even here, many respondents were cautious, warning that judicial processes are fragile and easily politicised.

Some participants emphasised the existence of civic counter-narratives, especially among youth, activists, and journalists. As a sociology scholar described a generation that has "an emotional distance from the war and political elites", which enables alternative forms of engagement" (BA110, 2025). But others, like BA111, warned that even this sphere is fragmented: "There are three societies—one in RS, another in the Federation, a third among those who have left. And no one talks to anyone" (BA111, 2025). Political resilience, in this view, is not just about resistance, but also about overcoming silos of silence and mutual detachment.

Despite this climate, several respondents insisted that legal norms still matter, even if they are often violated. "That's why Dodik always attacks the Constitutional Court—because they know it still has the power to stop things," said BA105 (BA105, 2025). Legal institutions, while weakened, were still perceived by some as potential anchors of the rule of law, especially when supported by international actors and domestic watchdogs.

In summary, political threats in BiH are perceived not only in terms of ethno-nationalist obstruction, but in the deeper erosion of democratic belief, institutional legitimacy, and civic participation. Opportunities for

resilience exist—through judicial mechanisms, media accountability, and civil mobilisation—but they are fragile, fragmented, and often disconnected from formal politics. The ability of BiH to withstand future shocks may depend less on new institutional designs and more on restoring the idea that the political system is a site of meaningful contestation, not a closed game.

2.6. Policy Areas

The first and most recurrent domain raised was the judiciary and the rule of law. Respondents described a legal system marked not by outright collapse, but by selective application, elite impunity, and fear-based compliance. According to one interviewee working on criminal justice reform, the problem lies not only in institutions but in "layered distrust." As they put it: "People no longer believe the courts serve justice— neither domestic nor international. And when you do not believe in justice, you prepare for violence or emigration" (BA118, 2025). Multiple actors pointed to the prosecutorial function as the weakest link, subject to political interference and self-censorship. BA101 stated that "we have laws, we have courts, but we do not have rulings that change the system" (BA101, 2025). The EU's role in judicial reform was viewed as insufficiently assertive, particularly regarding its leverage over prosecutorial appointments. While many respondents acknowledged the existence of legal harmonisation efforts, they stressed that without political vetting and the insulation of key institutions from party influence, reforms remain cosmetic. Several suggested that the EU should move beyond technical monitoring and apply stronger political pressure, including support for targeted vetting processes and independent legal watchdogs.

One respondent warned that this diluted conditionality can become a liability: "Sometimes lowering the criteria, the EU actually empowers those who believe that it is not necessary to fully adopt democratic standards. That moral hazard helps other foreign actors who can promote themselves as role models—such as Türkiye, Russia, or Hungary—to domestic elites." (BA99, 2025).

Closely linked to this was anti-corruption policy, which participants did not treat as a technical sector but as the underlying structure of political power in BiH. As BA107 argued, "corruption is not a byproduct—it is the governing model" (Interview with BA107). They described how EU and IMF funds, although often well-intentioned, are routed through systems that lack absorption capacity and operate under informal logics. Several interviewees questioned the impact of EU assistance that is implemented via state institutions without parallel monitoring by civil society. In their view, such support can inadvertently reinforce clientelism. Several interviewees emphasised that even when foreign funds are allocated to critical sectors, such as infrastructure or education, the disbursement process itself is susceptible to elite manipulation. One participant noted: "Foreign aid becomes a façade. They open a centre, take photos, sign plaques—and then it is forgotten. The system is built for short-term optics, not long-term change." (BA91, 2025) They called for the EU to strengthen independent anti-corruption platforms, particularly those working at the municipal level, and to tie macro-financial support to local-level transparency indicators.

Depoliticisation of public administration emerged as a third key policy domain. Respondents across entities described public institutions as extensions of political parties, with hiring and service delivery distorted by loyalty and patronage. A scholar gave a concrete example from the civil protection sector: "When we need a crisis expert, we get a party activist who does not know what an evacuation plan is." (BA106, 2025)

Respondents emphasised that performance-based budgeting, transparent recruitment criteria, and EU-supported institutional audits could help counter the embedded logic of spoils.

Respondents also described a rapidly closing civic space, particularly in Republika Srpska, but increasingly in the Federation as well. A security and international relations scholar warned that "the media are now the main front of war—the narrative one, in which truth loses every time" (BA105, 2025). The European Commission (2023) also warned of increased intimidation of journalists and shrinking civic space, recommending stronger protective mechanisms and transparency in media financing. Journalists and civil society actors described defamation lawsuits, inspections, and fiscal intimidation as standard tools used to silence dissent. Participants called for long-term, flexible EU funding for local civil society organisations, direct protection mechanisms for investigative journalists, and a shift away from short-cycle visibility-driven project grants that make strategic planning nearly impossible.

Institutional fragmentation fuels civic contraction. A Sarajevo based security and justice expert noted on 21 March 2025 that the Federation holds ten separate education ministries,[4] each writing its own curriculum and history narrative, which widens ethnic divides. Interviewees recommended a neutral advisory body at the state level to oversee curricula, teacher training in multi-perspectival history, joint civic education projects, and donor funding that depends on clear depoliticisation targets.

To strengthen civic resilience, respondents urged direct and sustained donor support for independent associations working on legal aid, youth engagement, and media oversight, rather than channelling aid through politicised agencies. They also called for transparent recruitment in public administration, including digital hiring platforms and independent third-party monitors, as a quick way to rebuild trust. Experts further warned that fragmented media and unmoderated online spaces erode social cohesion. They proposed investment in digital civic education, fact-checking hubs, and training for local journalists, coordinated with civil society groups already promoting narrative pluralism.

Youth disengagement and structural emigration were described not only as economic concerns but as deeply political phenomena. A sociology scholar stated: "Here, the future has become a joke. Ask a young person where they see themselves in five years, they say: anywhere but here." (BA110, 2025) Young people interpret political instability through a lens of inherited trauma and future loss. As one sociologist observed, "they do not see threats as abstract—they see them as the start of another war" (Interview with BA110). Younger generations were found to interpret constitutional tensions not as abstractions but as prelude to war. "They see the crisis as déjà vu of their parents' trauma—and they are ready to leave," said the respondent (BA110, 2025). This perception drives both emigration and a retreat from civic life. Several respondents described young people as aware, angry, but institutionally alienated, seeing elections and policymaking as elite spectacles. They stressed the need for EU support to youth-centred innovation hubs, digital economy platforms, and vocational training that bypasses party channels and offer genuine alternatives to migration. Respondents underscored the importance of youth not merely as beneficiaries, but as potential agents of

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[4] Bosnia's post-Dayton structure created an *"extravagant" decentralized education system with 14 ministries (10 cantonal, 2 entity, Brčko, and a nominal state ministry), entrenching ethnic separation in curricula* (Tanović, 2013).

systemic change. "Only educated, independent young people can change this system," one institutional leader emphasised. "Not the internationals. Not the political class." (BA101, 2025).

The environmental sector, while mentioned less frequently, was identified as a growing point of contention — and potential civic energy. Participants highlighted how extractive projects, including small hydropower plants and mining concessions, are granted through elite networks with no public oversight. "When they destroy your river, you do not ask who's Serb or Bosniak. You ask: 'who signed the contract'." (Focus group with experts, 18.03.2025, Banja Luka) Several respondents called for EU support for environmental monitoring technologies, legal aid for affected communities, and inclusion of environmental rights in municipal development planning.

Electoral integrity and party system reform were also recurring themes. Participants from both entities described elections as heavily skewed toward incumbents, with control over media, electoral commissions, and funding mechanisms. "We do not vote because we believe, but because we fear what happens if 'our side' does not win," said a Banja Luka participant (Focus group with experts, 18.03.2025, Banja Luka). Respondents suggested the EU could support non-partisan voter education, campaign finance disclosure, and stronger international monitoring not just at the national level, but in local and cantonal contests where manipulation is often most direct.

According to Damir Kapidžić, the post-Dayton institutional framework – intended to balance ethnic interests – in practice perpetuates the dominance of ethnonationalist parties. These ruling parties maintain power through patron–client relationships, distributing jobs and favours to loyal supporters within their ethnic group. Kapidžić notes that the pre-war patterns of ethnic voting have largely persisted, enabled by patronage networks and fear-based rhetoric. Hard-line nationalist parties thus consistently win elections, whether due to genuine popular support or the influence of "ever-present networks of nepotism, corruption, and patronage" that skew the playing field. This dynamic leads to institutional gridlock (as each ethnic bloc can veto reforms) and civic disengagement – citizens outside the dominant patronage loops feel disempowered and apathetic. The article reinforces that Bosnia's institutional dysfunction is not a temporary anomaly but a structural outcome: ethnic clientelism has become self-reinforcing. Without external pressure or internal reform to break this cycle, Kapidžić predicts ethnically divided party rule (and its associated corruption) will continue to thwart democratic development. *Suggested citation (in-text):* Kapidžić observes that Bosnia's governance has been effectively "captured by three ethnic oligarchies" who cement their rule via corruption and patronage, ensuring that hardline ethnic parties keep winning elections and blocking reforms. This creates a vicious cycle of dysfunction, as genuine civic alternatives struggle to emerge (Kapidžić, 2018).

Some interviewees raised the issue of psychosocial recovery and trauma, particularly in relation to unresolved war narratives and generational transmission. BA111 noted: "We have a political culture that feeds on trauma – and we have never had a serious strategy for psychosocial recovery" (Interview with BA111). The need for intergenerational dialogue and non-ethnic forms of collective memory work was identified as a gap where the EU could support schools, local institutions, and cultural actors.

Although BiH possesses a high level of formal legislative alignment with EU security standards, implementation remains hostage to political will. As one Ministry official put it, 'we have laws, but no

execution—only declarations and the hope someone else will intervene' (Interview with BA108). Finally, a cross-cutting concern was the perception that the EU too often confuses stability with neutrality. As a scholar from Banja Luka put it starkly: "When the EU says it does not take sides, it takes the side of whoever has the power to block things" (Interview with BA113). Several participants expressed frustration that EU actors prioritise procedural engagement with obstructionist elites while marginalising reformist or civic voices. They called for the EU to abandon its "equal distance" posture and explicitly support actors committed to legal and democratic norms.

Several interviewees noted that appeasement policies from the EU had enabled destabilising actors. One expert characterised past EU responses as "a politics of appeasement," in which institutional backsliding was tolerated in exchange for short-term calm. "Dodik would threaten, and then [the EU] would allow him something in return," one interlocutor stated (Interview with BA96).

These recommendations emerged strongly in the focus group, where participants stated: "Introduce sanctions like the US and UK. The only time Dodik had problems was due to American sanctions." Others warned of the disempowerment of institutions: "They are taking the processes that should be dealt with in institutions, out of institutions," and called for clearer positioning: "All EU voices need to send the same message to BiH." (Focus group with experts, 21.03.2025, Sarajevo).

These insights closely mirror regional patterns identified in the mapping exercise, particularly around state capture, civic erosion, democratic fatigue, and elite collusion. Respondents were clear: BiH does not need new blueprints, but consistent application of the standards the EU already claims to uphold. If BiH is to move forward, it will require more than conditionality tied to benchmarks; it will require solidarity with those attempting to hold the line against regression.

Respondents repeatedly emphasised that these areas do not represent technical gaps, but political battlegrounds where international actors must take a clear stand. What is required, they argued, is not neutrality, but alignment with the rule of law and democratic renewal—not as a slogan, but as a lived institutional commitment.

Policy Area	Domestic Gaps Identified	EU Role Suggested
Judicial independence and prosecutorial reform	Elite impunity, selective prosecution, weak case-tracking	Link IPA III rule-of-law funds to transparent appointment dashboards, joint peer review panels, and public asset-declarations
Anti-corruption and procurement transparency	Systemic corruption, opaque tenders, donor misuse	Require e-procurement rollout as a prior action, finance civic tech tools that publish contract data in real time
Curriculum oversight and education reform	Ten ministries, politicised history teaching, fragmented narratives	Condition education grants on unified core-curriculum standards,

		fund teacher retraining and multi-perspective textbook audits
Digital civic education and media literacy	Foreign disinformation, unmoderated online spaces, weak fact-checking	Support national fact-checking hubs, sponsor media-literacy modules in schools, train local journalists through Erasmus+
Protection of civic space and media freedom	Shrinking civic space, legal harassment, fiscal intimidation	Provide flexible legal-defence funds for NGOs, back investigative journalism centres, track abuse of SLAPP lawsuits
Depoliticisation of public administration	Party-based hiring, limited meritocracy, opaque exams	Fund digital hiring portals with EU-monitored algorithms, tie budget support to annual performance audits
Youth employment, innovation, and retention	Mass emigration, civic alienation, skills mismatch	Expand EIB-backed youth innovation hubs, subsidise vocational programmes linked to green transition projects
Electoral integrity and campaign-finance oversight	Incumbent media capture, weak oversight bodies	Deploy EU observation missions for local polls, fund civic apps that crowd-source campaign-spending data
Security-sector governance and defence alignment	Parallel command chains, entity obstruction, outdated doctrine	Use CFSP assistance to standardise training curricula, condition equipment aid on joint operational planning
Energy security and green transition	Coal dependence, external supply leverage, slow renewables uptake	Tie Energy Community compliance to grid-upgrade grants, co-finance community solar and district-heating pilots
Local governance and fiscal coordination	Fragmented municipal mandates, uneven service delivery	Introduce performance-based municipal grants, fund inter-municipal service clusters and shared IT platforms
Psychosocial recovery and generational dialogue	Trauma politics, no formal support networks	Finance school-based counselling, culture-of-memory programmes,

		and inter-generational dialogue workshops

2.7. Conclusion

This study shows that people in Bosnia and Herzegovina view foreign involvement through a lens of stalled institutions, entrenched elites, and worn-out citizens. International actors are not seen as neutral outsiders. Instead, they sit inside a domestic game that rewards obstruction and sidelines reformers. Interviewees described a circle in which local leaders exploit outside support, while the same support, often cautious or inconsistent, lets them keep blocking change.

The European Union drew the most attention. Many still look to Brussels for democratic standards, yet they fault the Union for slow, procedural responses and uneven pressure on spoilers. NATO retains some credibility in the security field, but its presence feels limited. Neighbouring states, especially Serbia and Croatia, are viewed as partisan patrons. Russia offers rhetorical cover for separatism, while Türkiye's role is mixed, more cultural than strategic.

Even so, the research points to small but real sources of resilience: environmental campaigns, local media investigations, youth entrepreneurship, and court cases that still move forward. These efforts struggle for attention and support, yet they prove that public energy is not spent.

Most respondents want outside partners to shift from managing crisis to backing clear rules and honest actors. That means firm responses to obstruction, stronger help for watchdog groups, and aid tied to obvious transparency tests. Bosnia and Herzegovina needs no new blueprints, only steady application of standards already on the table.

If international engagement remains hesitant, the present drift will persist. If it backs accountability and civic agency, the country can still open space for democratic renewal—an outcome that matters both for BiH and for wider commitments to democracy in South-East Europe.

2.8. References

2.8.1. List of interviews

Interview code	Affiliation (Broad)	Date (and place if possible)
BA81	Economics / Monetary policy	21.03.2025, Sarajevo
BA82	Security / State Institutions	21.03.2025, Sarajevo
BA83	EU Delegation	21.03.2025, Sarajevo
BA84	Federal Chamber of Economy	21.03.2025, Sarajevo

BA85	Security / State official	21.03.2025, Sarajevo
BA86	Criminal justice expert	21.03.2025, Sarajevo
BA87	Security / Political affairs	21.03.2025, Sarajevo
BA88	Media / Disinformation specialist	21.03.2025, Sarajevo
BA89	NGO / Civil society	21.03.2025, Sarajevo
BA90	Academic / Political science	21.03.2025, Sarajevo
BA91	Economic policy / Development	21.03.2025, Sarajevo
BA92	Academic / Sociology	21.03.2025, Sarajevo
BA93	Social work / Policy	21.03.2025, Sarajevo
BA94	Engineering / Public sector	21.03.2025, Sarajevo
BA95	Security / Hybrid threats	21.03.2025, Sarajevo
BA96	Legal / Institutional governance	21.03.2025, Sarajevo
BA97	Cultural diplomacy / Türkiye	21.03.2025, Sarajevo
BA98	Media / Political science	21.03.2025, Sarajevo
BA99	Geopolitics / Security	21.03.2025, Sarajevo
BA100	Think tank / Security	21.03.2025, Sarajevo
BA101	Legal expert / Institutional reform	21.03.2025, Sarajevo
BA102	Academic / Sociology	21.03.2025, Sarajevo
BA103	Economics / Development	21.03.2025, Sarajevo

BA104	Academic / Political science	21.03.2025, Sarajevo
BA105	Security / Journalism	21.03.2025, Sarajevo
BA106	Public administration / Crisis management	21.03.2025, Sarajevo
BA107	Economics / Fiscal policy	21.03.2025, Sarajevo
BA108	Ministry of Security	21.03.2025, Sarajevo
BA109	International organisations / Political science	21.03.2025, Sarajevo
BA110	Sociology / Youth studies	21.03.2025, Sarajevo
BA111	Academic / Transitional justice	21.03.2025, Sarajevo
BA112	Military / Officer training	21.03.2025, Sarajevo
BA113	Academic / Political science (Banja Luka)	18.03.2025, Banja Luka
BA114	Fiscal expert / Republika Srpska institutions	18.03.2025, Banja Luka
BA115	Think tank / Security studies	04.04.2025, Sarajevo
BA116	Sociology / Political transition	27.03.2025, Sarajevo
BA117	Ministry of Security	25.03.2025, Sarajevo

2.8.2. Focus group discussions

Focus Group Discussion	Group	Place and Date
Focus group with experts	Experts from academia and civil society	Banja Luka, 18.03.2025
Focus group with experts	Experts from academia and civil society	Sarajevo, 21.03.2025
Focus group with citizens	Focus group / Citizens (multi-ethnic)	12.03.2025, Sarajevo

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3. GEORGIA

Georgian Author I, Georgian Author II

Georgian Institute of Politics

3.1. Introduction

This report examines the perceptions of external actors in Georgia, drawing on extensive fieldwork conducted between December 2024 and April 2025 as part of the REUNIR project. The report explores how Georgian stakeholders perceive threats and opportunities emanating from external actors, with particular focus on military, socio-economic, and political dimensions as well as the nation's adaptive resilience capacities. Through in-depth interviews and focus groups with government officials, civil society representatives, business leaders, and security experts, this study provides a comprehensive analysis of how external influences shape Georgia's democratic development, European integration prospects, and overall security landscape. Through expert consultations and complementary research materials, this report offers a sophisticated perspective on Georgia's complex geopolitical circumstances and internal dynamics. The analysis reveals that Georgia is currently navigating a period of intense internal contestation over its future direction, a struggle heavily impacted by the perceived strategies and actions of key international players.

The national context within which these perceptions are formed is critical. Georgia finds itself at a pivotal juncture, marked by significant internal political turbulence and profound shifts in its external relations. The period spanning 2024 to early 2025 has been particularly tumultuous, defined by a series of interconnected crises that have challenged the country's democratic foundations and its long-standing Euro-Atlantic aspirations. A widely reported decline in democratic standards (Democratic Erosion, 2025) has taken hold (V-Dem Institute, 2025), with the ruling Georgian Dream (GD) party consolidating power amidst accusations of state capture (GE55, 2025; GE43, 2024). This trend was starkly highlighted by the V-Dem Institute's 2025 report, which reclassified Georgia as an "electoral autocracy," noting that 2024 marked its most significant democratic decline since independence (V-Dem Institute, 2025). This democratic backsliding is linked by many observers and interviewees to a potential fundamental realignment of the country's geopolitical orientation, with one interviewee identifying the "biggest threat for Georgia is isolation from the West, which is on its way" (GE41, 2025). The synergy between internal authoritarian consolidation and perceived external malign influences, particularly from Russia, suggests that domestic political choices are increasingly seen as having profound foreign policy implications, pulling the country away from its stated Euro-Atlantic goals (GE51, 2025; GE52, 2025; GE55, 2025).

A focal point of domestic and international criticism has been the reintroduction and enactment of the "foreign agents" law in 2024, formally titled the "Law on Transparency of Foreign Influence" or the "Foreign Agents Registration Act" (Human Rights Watch, 2025). It mandates that non-governmental organisations (NGOs) and media groups receiving over 20 % of their funding from abroad register as organisations pursuing the interests of a foreign power. Critics argue it is designed to stigmatise and stifle civil society and independent media, drawing parallels with similar repressive legislation in Russia and hindering freedom of association and expression. The European Union, for instance, officially voiced strong concerns regarding the

law's compatibility with EU norms and its detrimental impact on Georgia-EU relations (Kallas and Kos, 2025). The government's insistence on this law, despite the damage to its international reputation and EU aspirations, is interpreted by many as a deliberate step towards an illiberal model.

The political crisis was further inflamed by the October 2024 parliamentary elections. These elections were marred by widespread allegations of electoral fraud, voter intimidation, and irregularities, leading the opposition to boycott the new parliament and sparking sustained, large-scale protests demanding new, fair elections (Democratic Erosion, 2025; Freedom House, 2025). The government's response, which included instances of police violence and numerous detentions, only deepened the political schism (Freedom House, 2025). This widespread and persistent public protest, often visibly pro-European (Akhvlediani, 2025), underscores a significant societal resilience and a deep-seated desire for a democratic, European future, acting as a crucial counter-narrative to the government's current trajectory (Interview 47, 2025; Interview 52, 2025; Interview 55, 2025). This societal cleavage, pitting a government perceived as increasingly authoritarian and Russia-leaning against a populace largely aspiring to Western integration, is a defining feature of contemporary Georgia (Interview 42, 2025).

Compounding these internal issues, the GD government announced in November 2024 the suspension of EU accession talks until 2028 (Akhvlediani, 2025; Victor, 2025). This decision, viewed by many as unconstitutional and a betrayal of Georgia's national interests and popular will, triggered further protests and international condemnation, significantly straining relations with Brussels and other Western partners (GE42, 2025).

Georgia's socio-economic landscape presents a mixed picture. While the country has experienced economic growth in recent years, partly attributed to post-pandemic recovery and geopolitical shifts such as the influx of Russians following the full-scale invasion of Ukraine (GE47, 2025; GE51, 2025; World Bank, 2025; GE45, 2025), significant structural challenges persist. These include high unemployment, pervasive poverty, persistent inflation (GE44, 2025), and a growing, concerning economic dependence on Russia (GE47, 2025; GE54, 2025; GE55, 2025). Vulnerabilities in key sectors, such as a potentially overheating real estate market, add to these concerns (GE 54, 2025). This economic situation is not detached from the political context; the reported growth figures may mask underlying structural weaknesses and dependencies that could be exploited for political leverage. A façade of stability might conceal a fragile economic foundation, susceptible to both internal policy choices and external pressures (GE 47, 2025; GE 54, 2025; GE 55, 2025).

The **security environment** remains precarious. Russia's ongoing occupation of the Georgian territories of Abkhazia and South Ossetia (Tskhinvali Region) constitutes a direct and enduring threat to Georgia's sovereignty and territorial integrity (GE 47, 2025; GE 50, 2025). The full-scale war in Ukraine has further amplified regional instability and profoundly influenced Georgia's security perceptions, foreign policy calculations, and economic considerations (GE 47, 2025; GE 50, 2025; GE 51, 2025).

This country report builds upon a broader mapping exercise conducted within the REUNIR project, which aims to understand external influences across the Eastern Neighbourhood and Western Balkans. Its overarching goal of identifying patterns of influence and resilience informs the analytical framework of this study. The current research delves deeper into the Georgian case, seeking to understand how these complex internal and external factors are perceived by actors on the ground and what implications these perceptions hold for Georgia's future.

3.1.1. Methodology

This report primarily draws its qualitative data from a series of in-depth interviews and focus groups conducted with a range of experts and stakeholders in Georgia. These interviews took place between December 2024 and April 2025, a period of significant political and social flux within the country. The timing of these interactions is critical, as they capture perceptions formulated during an acute political crisis following the controversial October 2024 elections and the government's subsequent decisions, notably the suspension of EU accession talks and the continued enforcement of restrictive legislation (Akhvlediani, 2025). Consequently, the findings reflect not just general views but analyses deeply informed by these immediate and impactful events.

The interviews were semi-structured, guided by a common set of questions designed to elicit perceptions on external influences, threats, opportunities, and resilience across military, socio-economic, and political domains. Prior to the interviews, respondents were informed about the REUNIR project, its funding under the Horizon Europe programme, the purpose of the data collection, data protection measures, and their rights as participants, including the right to withdraw or refuse to answer specific questions. Consent for recording the interviews was obtained on record from each participant.

The range of expertise among the interviewees, encompassing business leaders, economists, former military and defence officials, civil society actors, public opinion researchers, and diplomats, provides a multi-faceted view of the threats and resilience challenges facing Georgia. However, it is important to note that a number of respondents explicitly identified with or were described through their work as being part of, civil society circles highly critical of the current government (GE 55, 2025; GE 41, 2025). This characteristic of the sample likely reflects the highly polarised environment in Georgia and the potential difficulties in accessing pro-government voices willing to speak candidly on these sensitive topics to an EU-funded research project during such a period of crisis. This report aims to present these views as the perceptions of these specific actors, contextualised by the broader political situation, rather than as a definitive statement on behalf of all segments of Georgian society.

A total of 31 interlocutors participated in the research process, including both interviews and focus groups. The table below provides a breakdown by sector, gender, and category of engagement:

Category	Interviews	Focus Groups	Total
Academia	4	3	7
Civil Society & Media	6	5	11
State Institutions	1	0	1
Private Businesses/Chambers	2	0	2
Other (including EU Delegation)	1	9	10
Total Participants	14	17	**31**

3.2. Perceptions on external actors in Georgia

3.2.1. Context

The perceptions of external actors in Georgia are fundamentally shaped by the country's tumultuous political trajectory during 2024-2025, a period marked by what many observers characterise as accelerated democratic backsliding and a potential geopolitical reorientation. As one civil society representative starkly noted: "We are witnessing a total shift in our foreign policy, economic policy, in our strategic partnerships. It's a very historic moment for Georgia that will determine the next 30-50 years of Georgia's economic and political and security development." (GE51, 2025).

The October 2024 parliamentary elections serve as a critical inflection point in understanding current perceptions. These elections, widely criticised by international observers for irregularities and fraud (OSCE/ODIHR, 2024), resulted in the Georgian Dream party claiming victory amid widespread protests and opposition boycotts. The legitimacy crisis stemming from these elections has profoundly coloured how stakeholders view both internal governance and external relationships. A former government official explained: "Whether we recognise the election results or not, so we openly see some serious problems with the recent elections, parliamentary elections, and the results cannot be regarded as valid ones." (GE 56, 2025).

The government's November 2024 decision to suspend EU accession negotiations until 2028 represented a watershed moment that crystallised perceptions about Georgia's direction. The decision carried particular weight given that Georgia had only been granted official EU candidate status in December 2023, marking a historic milestone in the country's decades-long pursuit of European integration. This move, coming shortly after the disputed elections, was interpreted by many as a fundamental betrayal of Georgia's constitutional commitment to European integration. As an economist observed: "This decision, viewed by many as unconstitutional and a betrayal of Georgia's national interests and popular will, triggered further protests and international condemnation." (GE 46, 2025).

The enforcement of the "Law on Transparency of Foreign Influence," commonly known as the "foreign agents" law, has created a climate of fear and restriction that fundamentally shapes how actors perceive external engagement. Modelled after Russian legislation, this law requires organisations receiving more than 20 % of funding from abroad to register as "pursuing the interests of a foreign power". A civil society leader described its impact: "New FARA law means that we will be imprisoned if we refuse to register... It has chilling effects on them because nobody wants to be labelled as foreign spies." (GE41, 2025).

The regional security environment, particularly Russia's full-scale invasion of Ukraine since February 2022, provides essential context for understanding threat perceptions. Multiple respondents emphasised how the war has recalibrated security calculations and exposed Georgia's vulnerabilities. A security expert noted: "War in Ukraine, the outcome of this war will have a tremendous effect... without an acceptable outcome of this war, I see the democratic chances for democracy very limited." (GE53, 2025). At the same time, however, the war has also reshaped the European Union's approach towards the region, pushing the EU to expand its enlargement policy to include countries like Georgia, Moldova, and Ukraine as part of a broader geopolitical response to Russian aggression.

Economic dynamics during this period have been paradoxical. While Georgia experienced GDP growth averaging 10 % over the past three years, largely attributed to the influx of Russians fleeing mobilisation and Georgia's role in sanctions circumvention, this growth masks deepening structural vulnerabilities. An economist warned: "Georgian economy grew by, I guess, 135 % in real terms last three years. But this was mainly because of war in Ukraine, because of Russian immigrants, because of using Georgia as a kind of part of the supply chain from Europe to Russia." (GE51, 2025)

The protest movement that emerged following the October elections and intensified after the suspension of EU talks represents a significant contextual factor. By the time of the interviews, protests had exceeded 100 consecutive days, demonstrating remarkable societal resilience. A civil society activist emphasised: "This widespread and persistent public protest, often visibly pro-European, underscores a significant societal resilience and a deep-seated desire for a democratic, European future." (GE43, 2025)

The polarisation between the state and some parts of the society, as well as among different societal groups, has reached unprecedented levels. While public opinion surveys consistently show 70-80 % support for EU integration (NDI, 2024), government actions move in the opposite direction. This disconnect was repeatedly highlighted by respondents as a fundamental feature of the current context. As one researcher noted: "Even though the Georgian Dream was using anti-EU rhetoric, people still want the EU membership and it does not decrease. It's still around 80 %." (GE44, 2025)

The role of oligarchic influence, particularly that of Bidzina Ivanishvili, Georgian Dream's founder and widely considered the country's de facto ruler, pervades perceptions of both internal and external dynamics. Multiple respondents emphasised his role in shaping Georgia's trajectory. A political analyst stated bluntly: "He owned third part of Georgia's GDP, yeah, you can imagine. So, as he is like the oligarch, it's a huge problem. For me, it's really vital for us that he's leaving Georgia's politics." (GE55, 2025)

International responses to Georgia's democratic deterioration have been mixed and often delayed, contributing to a sense of abandonment among pro-democratic forces. The EU's bureaucratic response to the crisis was particularly criticised. One civil society leader expressed frustration: "It's almost one year since EU has announced that they will move their funds from government support to CSO support. Almost one year, nine, ten months. Nothing has happened." (GE51, 2025)

The changing role of the United States under the Trump administration added another layer of uncertainty. Several respondents noted the closure of USAID programmes and a general retreat from democracy promotion. A civil society representative observed: "The US is not a reliable partner anymore for Georgian civil society and for media… I don't see it will change in at least one year or two." (GE51, 2025)

This context of democratic regression, geopolitical uncertainty, economic vulnerability, and societal resistance forms the backdrop against which Georgian stakeholders perceive and evaluate external actors. The interviews reveal a society deeply divided about its future direction, with perceptions of external actors increasingly viewed through the prism of whether they support Georgia's democratic, European path or enable its authoritarian drift toward the Russian sphere of influence.

3.3.   Military Threats, Opportunities, and Resilience

The perception of military threats in Georgia is overwhelmingly dominated by concerns regarding the Russian Federation, alongside an acknowledgment of the nation's current vulnerabilities and the critical need for enhanced international partnerships to bolster its defence capabilities.

3.3.1. Analysis of Perceived Military Threats

The primary, and virtually unanimous, military threat identified by respondents is Russia (GE 47, 2025; GE 50, 2025; GE 51, 2025; GE 52, 2025). This threat is multifaceted – through ongoing occupation of parts of Georgian territory, the looming risk of conventional attack and the applied hybrid warfare. Russia's enduring military presence in the Georgian regions of Abkhazia and Tskhinvali Region/South Ossetia is viewed as a persistent, direct military threat to Georgia's sovereignty and territorial integrity (GE 47, 2025; GE 50, 2025). This occupation serves as a constant reminder of past conflicts and unresolved territorial disputes.

A direct conventional military assault by Russia is considered a tangible possibility, particularly if the political landscape in Georgia were to shift towards a government less favourable to Moscow's interests (GE50, 2025). One former defence civil servant estimated that Russia could potentially occupy the country with a force of 20 000-40 000 troops, a scale that current Georgian forces would struggle to counter (GE 50, 2025). The ongoing war in Ukraine is also seen as a potential source of spillover, escalating risks for Georgia (GE47, 2025; GE50, 2025).

Beyond conventional threats, Russia is perceived to be actively engaged in hybrid warfare against Georgia. This includes cyber-attacks, sophisticated disinformation campaigns, and efforts to foment internal instability (GE50, 2025; GE51, 2025; GE52, 2025). Some respondents argue that the success of these hybrid tactics, particularly if the current Georgian government is seen as compliant or aligned with Russian interests, reduces Moscow's immediate need for a large-scale conventional attack (GE 50, 2025; GE52, 2025). One analyst noted that Russia currently does not need to use overt military force as the Georgian government is perceived as "maximally loyal" (GE52, 2025).

The likelihood of a conventional Russian attack is generally assessed as lower while the current Georgian government remains in power and maintains policies perceived as accommodating to Russian interests. However, this likelihood is seen to increase significantly should there be a distinct pro-Western political shift in Tbilisi (GE50, 2025). In contrast, hybrid threats, including disinformation and cyber activities, are considered ongoing and highly probable elements of Russia's engagement with Georgia (GE50, 2025; GE 52, 2025).

3.3.2. Identified Opportunities for Strengthening Military Security

Respondents identified several avenues through which Georgia could enhance its military security and resilience, including the adoption of a comprehensive defence model, the enhancement of international partnerships, leveraging support from the European Union, the modernisation of its armed forces, and the development of strong reserve forces.

A frequently suggested opportunity is the adoption of a "comprehensive defence, integrated total defence type of system" (GE50, 2025). This model, drawing inspiration from countries like Sweden and the Baltic states, would involve an all-of-government approach and broad societal participation in national defence efforts. Deepening security cooperation with key international partners is seen as crucial. Specific mention was made of the United States, Baltic states, Nordic countries (particularly Sweden for its expertise in total defence), and the United Kingdom for advice, training, and military equipment (GE50, 2025).

Leveraging EU support is also considered an important opportunity. This could encompass assistance for non-military aspects of defence, such as strengthening civil defence mechanisms, enhancing healthcare system resilience in crises, and bolstering national capacities to counter disinformation (GE 50, 2025). The recent announcement of a new EU strategy for a secure, prosperous, and resilient Black Sea region in May 2025 further underscores the EU's commitment to enhancing regional stability and could provide a broader framework for such support (European Commission, 2025). Furthermore, there is potential for EU support in training and equipping Georgian forces, possibly through mechanisms like the European Peace Facility (EPF), from which Georgia has already received some funding for non-lethal aid (GE50, 2025). An advantage of EU-led support, as noted by one respondent, is that it might be perceived as less provocative to Russia compared to direct NATO assistance (GE50, 2025).

A critical need is the modernisation of Georgia's armed forces. This includes the acquisition of new and advanced military capabilities, with a particular emphasis on strengthening long-range artillery systems. Increasing the size, professionalism, and readiness of the armed forces is also highlighted (GE50, 2025). Building robust and well-trained reserve and territorial defence forces is seen as essential, drawing lessons from the experience of Ukraine in mobilising its population for defence (GE50, 2025).

3.3.3. Assessment of Georgia's Military Resilience

The current state of Georgia's military resilience is a subject of significant concern among the interviewed experts. The current state of Georgia's military resilience is a subject of significant concern among the interviewed experts. Four interrelated factors were identified as shaping this situation: the weakness of the armed forces, the government's lack of political will, Georgia's dependence on external partners, and the potential but constrained role of societal will to resist. In addition, many respondents pointed to lessons from Ukraine as a source of insight, though their applicability in Georgia remains contested.

Georgian armed forces are widely perceived as lacking in terms of manning levels, modern equipment, comprehensive training, and overall readiness (GE50, 2025; GE55, 2025). A former defence official stated unequivocally that the "readiness level is quite low" (GE50, 2025).

A critical factor undermining Georgia's military resilience is the current government's perceived unwillingness to genuinely define Russia as an adversary and to invest adequately in national defence capabilities to counter Russian threats (GE50, 2025; GE52, 2025; GE55, 2025). One respondent asserted that the government is "not willing to do anything to sort of balance Russian influences" (GE52, 2025), while another claimed the GD is actively "destroying our defence system and security system" (GE 55, 2025). This perceived lack of political will at the highest levels is arguably more debilitating to national defence than material shortfalls alone.

Military aid and partnerships, without a corresponding shift in Tbilisi's political posture and a clear commitment to national defence against recognised threats, may prove ineffective.

There is a consensus that Georgia cannot adequately address the military threats it faces on its own and is heavily reliant on the support and cooperation of international partners (GE47, 2025; GE49, 2025; GE50, 2025). However, the effectiveness of such partnerships is fundamentally questioned if the recipient government itself is not fully committed to the shared security objectives.

While institutional military capacity is assessed as low, some respondents believe that the "will of Georgians to fight" could emerge as a significant factor in resisting potential aggression (GE50, 2025). However, this societal resilience would need to be effectively mobilised, trained, and supported by a government committed to national defence. The "peace" narrative ("no war") promoted by the Georgian government, particularly in the context of Russia (GE 47, 2025), presents a complex challenge. While it may aim to de-escalate direct military confrontation, critics argue it achieves this by compromising on long-term sovereignty, democratic integrity, and national preparedness, effectively enabling Russian hybrid warfare objectives by discouraging a robust defence posture (GE47, 2025; GE55, 2025).

The experience of Ukraine is frequently cited as a source of valuable lessons, particularly regarding the potential of societal resistance and territorial defence strategies (GE 50, 2025; GE 55, 2025). However, the application of these lessons in Georgia is significantly hampered by the differing political contexts. While Ukraine has demonstrated a unified national response to aggression, the current Georgian government is perceived by critics as actively discouraging forms of mobilisation or defence preparation that might be seen as countering Russian interests. This suggests that the opportunity to learn from and implement Ukraine's successful strategies is politically constrained within Georgia.

3.4. Analysis of Perceived Socio-economic Threats

A primary concern voiced by respondents is Georgia's **dependence on unreliable or potentially hostile economies**. In addition to this external vulnerability, several internal structural weaknesses were highlighted, including pervasive corruption, high poverty and inequality, low productivity, and persistent challenges for small businesses. Respondents also pointed to Georgia's exposure to external shocks, such as sanctions or a real estate crisis, and warned that government policies themselves risk exacerbating these socio-economic threats.

The over-reliance on the Russian market for exports (GE47, 2025; GE54, 2025) and an increasing dependency on Russian energy sources (GE54, 2025) are seen as critical vulnerabilities. This economic intertwining provides Moscow with significant leverage, allowing it to use trade and energy as political tools. One business leader found it "worrisome" that Russia had become Georgia's top trade partner (GE47, 2025).

While increased economic ties with China and other non-democratic states[5] offer a degree of diversification (GE49, 2025; GE54, 2025; GE55, 2025), they also bring risks. These include the potential import of non-

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[5] Such as Türkiye, Azerbaijan, Iran, the Golf States.

transparent business practices, heightened corruption, and the undermining of democratic governance and fair competition, particularly if these relationships are not carefully managed and balanced with partnerships with democratic nations (GE49, 2025; GE54, 2025). The Georgian government's pursuit of these ties, sometimes framed as pragmatic diversification (GE51, 2025; GE54, 2025), is perceived by critics not merely as an economic strategy but as a deliberate political manoeuvre. This move is seen to consolidate authoritarian rule by reducing dependency on Western partners who typically attach democratic conditionalities to their aid and investment.

Internal structural weaknesses further exacerbate Georgia's socio-economic vulnerabilities. Pervasive corruption, coupled with what one respondent termed "Soviet-style business deals" (GE54, 2025), linked to informal rule by powerful individuals like Bidzina Ivanishvili, is seen as hindering fair competition, impeding sustainable development, and stifling technological progress (GE54, 2025; GE55, 2025).

Despite reported economic growth, high levels of poverty, unemployment, and significant income inequality persist, particularly between the capital, Tbilisi, and the regional areas (GE 47, 2025; GE55, 2025; GE44, 2025). One respondent highlighted that 1.2 million people (a substantial portion of the population) apply for basic social assistance, with 700 000 receiving it (GE55, 2025).[6] This high level of social vulnerability creates a dependent populace that may be easier for an authoritarian-leaning government to control through patronage, framing political opposition as a threat to their minimal economic security. This systemic vulnerability can thus become a tool for political entrenchment.

A significant portion of the workforce remains engaged in low-productivity agriculture or is self-employed, with limited creation of high-quality, sustainable jobs (World Bank, 2025). Small and medium-sized enterprises (SMEs) continue to face difficulties in accessing finance, and a mismatch between available skills in the workforce and the demands of the labour market impedes business growth and innovation (World Bank, 2025).

Georgia is also exposed to external shocks and the risk of sanctions. economy is considered vulnerable to potential Western sanctions, especially if key oligarchs or large businesses closely linked to them are targeted due to democratic backsliding or other concerns (GE54, 2025; GE 43, 2024). Such sanctions could trigger severe economic consequences, including capital outflow, currency depreciation, high inflation, and recession (GE54, 2025).

The real estate sector has been identified as particularly vulnerable, heavily reliant on credit and external demand, which saw a surge from Russian influx and Israeli buyers (GE 54, 2025). A sharp decrease in demand, potentially triggered by ongoing political instability, could lead to the bursting of this bubble, with severe knock-on effects across the broader economy (GE 54, 2025). This vulnerability is amplified by the current government's strained relations with Western financial institutions, which would be crucial in a bailout scenario, suggesting political choices are directly increasing financial risk. Recent trends show falling

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[6] This number corresponds broadly with official data from Social Service Agency of Georgia, which reported 684,432 individuals receiving subsistence allowance in 2024.

remittances, particularly from Russia, and weaker Foreign Direct Investment (FDI) inflows, reflecting declining investor confidence and a less favourable economic outlook (World Bank, 2025).

Finally, government policies themselves are perceived as a threat. The current government's distancing from the European Union and democratic norms is seen as directly jeopardising Georgia's economic prospects, potentially leading to increased isolation and the loss of vital opportunities for growth and development (GE 47, 2025). The failure to actively join and utilise EU financial facilities also limits access to crucial funds for SMEs and other development initiatives (GE 48, 2025).

3.4.1. Identified Opportunities for Sustainable Socio-economic Development

Despite the threats outlined above, respondents also identified several opportunities for strengthening Georgia's socio-economic development. These include leveraging the country's strategic transit function, diversifying trade and investment, deepening EU integration, investing in human capital, fostering small and medium-sized enterprises (SMEs), and implementing carefully managed privatisation initiatives.

Georgia's strategic geographical location as a key part of the Middle Corridor, connecting East and West, presents a significant economic opportunity (ECFR, 2025; GE 48, 2025; GE 49, 2025). This potential should be developed beyond mere transit to include value-added services, logistics hubs, and re-export capabilities (GE 49, 2025). Actively seeking a broader range of trade partners (e.g., the US, Arabic countries, India (GE 49, 2025)) and attracting diverse sources of investment is crucial to reduce over-reliance on any single actor or region (GE49, 2025).

If pursued genuinely, deeper integration with the EU market, including full and effective utilisation of the DCFTA (by aligning domestic production with export opportunities and meeting EU standards (GE49, 2025), remains a paramount opportunity for economic modernisation and sustainable growth (GE47, 2025; GE49, 2025).

Given Georgia's limited natural resource wealth, investing in education, skills development, and innovation to make its population competitive in the international labour market is essential for long-term prosperity (GE54, 2025). Policies that stimulate and effectively support the growth of SMEs are vital for fostering inclusive economic growth, creating jobs, and enhancing diversification (GE 49, 2025).

The privatisation of some state-owned assets could attract investment and bring in better management practices. However, respondents cautioned that strategic assets, such as ports, energy infrastructure, and railways, should retain a significant degree of government control or leverage to protect national interests (GE 49, 2025).

3.4.2. Assessment of Georgia's Socio-economic Resilience

Georgia's socio-economic resilience is generally assessed as low, particularly concerning its capacity to withstand major shocks. Respondents highlighted four key factors contributing to this situation: the country's limited ability to absorb economic crises, the negative impact of political instability, the government's role in undermining resilience, and persistent inequalities in wealth distribution.

The country is perceived to have limited indigenous tools or mechanisms to effectively counteract major economic crises, such as the bursting of a real estate bubble or the imposition of widespread international sanctions (GE 54, 2025). In such scenarios, resilience would heavily depend on substantial external financial support, for instance, from the EU or the US (GE 54, 2025). An EU official also noted that Georgia has proved "remarkably resilient" to external shocks like COVID and the Russia war against Ukraine at a macro level, partly due to strong National Bank stewardship initially (GE 45, 2025). However, this resilience is now being tested by political instability (GE 45, 2025).

Economic resilience is severely undermined by the prevailing political instability and democratic backsliding. This environment deters foreign and domestic investment, erodes business confidence, and increases economic uncertainty (GE54, 2025; World Bank, 2025). The current government's policies—including increasing economic dependence on Russia, alienating Western partners, and allegedly fostering corruption—are seen as actively weakening socio-economic resilience (GE47, 2025; GE54, 2025; GE55, 2025). One respondent noted that the government might be willing to compromise democratic principles and EU ties "for the sake of peace," a peace that includes closer economic ties with Russia (GE47, 2025).

Even when economic growth occurs, its benefits are not perceived to be fairly distributed throughout society. Persistent poverty and unemployment indicate that aggregate growth does not automatically translate into improved societal well-being or enhanced resilience for the most vulnerable populations (GE47, 2025; GE55, 2025).

3.5. Political Threats, Opportunities, and Resilience

Georgia's political landscape is fraught with significant threats to its democratic development and stability, largely stemming from internal governance issues and exacerbated by external influences. However, opportunities for positive change, rooted in societal aspirations and potential international support, also exist.

3.5.1. Analysis of Perceived Political Threats

The most prominent political threat identified by respondents is democratic backsliding and authoritarian consolidation under the Georgian Dream government. This multifaceted threat is characterised by the capture of state institutions, electoral malpractice, the systematic weakening of democratic checks and balances, restrictive legislation targeting civil society, and the repression of dissent.

The GD party, widely perceived to be influenced by oligarch Bidzina Ivanishvili, is seen as having captured key state institutions, thereby undermining democratic checks and balances (Akhvlediani, 2025; Freedom House, 2025; GE55, 2025; GE43, 2024). One respondent described GD as building "consolidated authoritarianism" (GE55, 2025). This process appears to be a form of "stealth authoritarianism" (Dorsa H, 2025), where the outward forms of democratic processes, like elections, are maintained, but their substantive content, along with fundamental checks and balances, is systematically dismantled. This nuanced approach can make it more challenging for international actors to formulate decisive responses compared to overt authoritarian takeovers

The October 2024 parliamentary elections were heavily criticised for alleged rigging and manipulation of electoral laws, which severely undermined their democratic legitimacy and triggered widespread protests (Freedom House, 2025; V-Dem Institute, 2025; GE47, 2025; GE52, 2025; GE43, 2024). The weakening of democratic institutions was another recurring concern raised by respondents. The parliament has effectively become a one-party entity due to opposition boycotts (GE47, 2025; GE52, 2025), the politicisation of the judiciary (Freedom House, 2025; GE 43), and exertion of control over nominally independent bodies such as the Ombudsperson's office (GE55, 2025).

The "foreign agents" law is perceived as a particularly damaging development. This legislation is widely viewed as a tool specifically designed to stigmatise, suppress, and ultimately dismantle critical CSOs and independent media, which are essential for democratic oversight and accountability (Human Rights Watch, 2025; OSCE, 2025; GE 41, 2025). Respondents also pointed to a broader climate of fear and intimidation, citing numerous reports of violence against peaceful protesters, harassment of journalists, and legal persecution of opposition figures (Freedom House, 2025; Human Rights Watch, 2025; GE 41, 2025; GE 43, 2024). The use of surveillance technologies, reportedly including AI-powered systems to monitor protesters, further contributes to creating a climate of fear and restricting civic space (Gvadzabia, 2025).

Foreign interference and malign influence, primarily attributed to Russia, is another major political threat identified by respondents. This encompasses both alleged direct interference in Georgia's democratic processes and broader efforts to shift the country's geopolitical orientation away from the West. Several respondents referred to allegations of Russian interference in Georgian elections, as well as Moscow's ongoing support for anti-Western narratives and political forces operating within the country (GE41, 2025; GE43, 2024). In this context, the Georgian government's notable foreign policy shift towards Russia and its concurrent distancing from the European Union and other Western partners are seen by many as either a direct result of, or as enabling, this malign influence (GE47, 2025; GE51, 2025; GE52, 2025; GE55, 2025; GE42, 2025).

Internal political dynamics also contribute significantly to Georgia's current political vulnerabilities. Respondents pointed to four interrelated factors: deep political polarisation, a weak and fragmented opposition, the erosion of public trust in democratic institutions, and the government's exploitation of conservative values to entrench its power. The country suffers from profound political divisions, which are often exploited by the government to consolidate its power base and marginalise opposition (GE 47, 2025; GE52, 2025; GE43, 2024). There is a lack of consensus on the country's strategic direction among political elites (GE53, 2025). One interviewee specifically mentioned the "political division in the country" as a key threat (GE 47, 2025).

The political opposition is frequently described as weak, fragmented, and struggling to offer a coherent and credible alternative vision or to effectively mobilise popular discontent beyond urban centres (GE51, 2025; GE55, 2025; GE41, 2025; GE42, 2025). One respondent characterised the opposition as "the weakest point" in the current political equation (GE51, 2025). There is also a discernible erosion of public trust in political institutions and democratic processes, fuelled by the aforementioned issues (GE47, 2025; GIP 2025).

Finally, the government's use of conservative values and ethno-religious nationalism (GE55, 2025; GE41, 2025) serves not only to mobilise a specific voter base but also to create deeper societal cleavages. The

promotion of this 'traditional values' discourse is often significantly amplified by influential religious institutions, like the Georgia's Orthodox Church, and reinforced by Russian propaganda that champions a similar agenda. This tactic can distract from governance failures and make cross-cutting democratic alliances more difficult to forge, mirroring strategies employed by other populist and authoritarian regimes globally.

3.5.2. Identified Opportunities for Democratic Consolidation and Political Stability

Despite the challenging political environment, respondents identified several opportunities for positive political development. These include strong public support for democracy and EU integration, the potential emergence of new political actors, the role of international pressure and support, the necessity of fundamental reforms, and the importance of national dialogue and consensus building. The sustained and widespread protests, along with consistently high public support for EU membership, demonstrate a strong societal commitment to democratic values and a European future (GE 47, 2025; GE 52, 2025; GE 42, 2025; GE 44, 2025). This popular sentiment forms a powerful mandate for change.

There is potential, and indeed a hope expressed by some respondents, for new, grassroots political groups or leaders to emerge from civil society or the ongoing protest movements. These could offer fresh perspectives and alternatives to the established political forces (GE 51, 2025; GE 55, 2025). One expert expressed hope for "new groups emerge in Georgian politics, even from civil society sector" (GE 51, 2025). The perceived weakness of the formal opposition may inadvertently create space for such organic, non-traditional forms of political resistance, although these face immense challenges in terms of organisation, resources, and government repression.

Coordinated, assertive, and strategically applied international pressure—including targeted sanctions, robust diplomatic engagement, and conditional aid—from the EU, the US, and other democratic partners could create crucial space for domestic democratic forces to operate and advocate for reform (GE 47, 2025; GE 51, 2025; GE 52, 2025; GE 42, 2025). A return to a democratic path would necessitate fundamental reforms of the electoral system to ensure genuinely free and fair elections, and comprehensive judicial reform to establish an independent and accountable judiciary. These are prerequisites for restoring public trust and political stability.

Finally, several respondents underscored the importance of fostering inclusive national dialogue and building consensus among diverse political and societal actors on key national issues, including constitutional reforms and strategic foreign policy orientation, are considered vital (GE55, 2025). One respondent explicitly suggested a "consensus-building approach" as a way forward (GE55, 2025).

3.5.3. Assessment of Georgia's Political Resilience

Georgia's political resilience presents a mixed and concerning picture. Respondents pointed to four interrelated dimensions: the weakness of formal democratic institutions, the precarious yet active role of civil society, the potential of societal resilience, and the detrimental role played by the current government in undermining the country's democratic foundations. Formal democratic institutions, including the parliament, judiciary, and electoral administration, are perceived as severely weakened, largely co-opted by

the ruling party, and failing to perform their democratic functions effectively (Freedom House, 2025; GE 47, 2025; GE 52, 2025; GE 42, 2025).

CSOs and independent media are at the forefront of resisting authoritarian trends and advocating for democratic values. However, they face immense pressure from the government, including legal restrictions like the "foreign agents" law, financial constraints, harassment, and delegitimisation campaigns (Human Rights Watch, 2025; OSCE, 2025; GE 41, 2025; GE 47, 2025; GE 52, 2025; GE 55, 2025). Their survival and ability to operate are seen as critical for maintaining any semblance of democratic oversight and accountability (GE 47, 2025).

The Georgian population's strong and demonstrated pro-democratic and pro-European sentiment represents a significant reservoir of societal resilience (GE 42, 2025; GE 44, 2025). However, translating this widespread sentiment into effective and sustained political change is a formidable challenge, given government repression, the weakness of the formal opposition, and prevailing socio-economic vulnerabilities that can dampen activism (GE 55, 2025).

Finally, the Georgian Dream government is overwhelmingly perceived by the interviewed experts as the primary driver of democratic erosion and the main obstacle to strengthening political resilience (GE 47, 2025; GE 51, 2025; GE 52, 2025; GE 55, 2025; GE 42, 2025). Its actions are seen as deliberately weakening democratic norms and institutions.

3.6. Policy areas

The interviews conducted for this research revealed several key policy areas where respondents believe greater support, particularly from the European Union and other international democratic partners, is urgently needed to address Georgia's current challenges and bolster its resilience. These suggestions often reflect a desire for a more assertive and direct engagement model that prioritises democratic values and civil society.

1. **Strengthening Democratic Institutions and Rule of Law:**

A consistent theme among respondents was the critical need for external support in restoring the integrity and functionality of Georgia's democratic institutions. This includes a strong emphasis on promoting judicial independence, ensuring the conduct of free and fair electoral processes according to international standards, and strengthening parliamentary oversight mechanisms to hold the executive accountable (GE 47, 2025; GE 52, 2025). The European Union, in particular, is urged by several interviewees to be more assertive and unequivocal in demanding adherence to fundamental democratic principles and the rule of law as a core component of its engagement with Georgia (GE 47, 2025; GE 52, 2025). This involves supporting comprehensive reforms that ensure state institutions are de-politicised and shielded from partisan capture or oligarchic influence. Specific policy steps suggested by one business leader included the restoration of justice for past abuses, concerted efforts to reduce political polarisation, the withdrawal of recently enacted undemocratic laws (such as the "foreign agents" law), a comprehensive strengthening of all democratic institutions, and the holding of new, genuinely fair elections under robust international observation (GE 47, 2025).

2. **Support for Civil Society Organisations (CSOs) and Independent Media:**

This was identified as perhaps the most critical and immediate area for policy intervention by a majority of respondents (GE 47, 2025; GE 48, 2025; GE 51, 2025; GE 42, 2025). There is a profound loss of trust in the Georgian state as a reliable partner for democratic development, leading to calls for the EU and other international partners to bypass the government and channel support directly to these non-state actors.

- **Direct Funding and Capacity Building:** A strong consensus emerged for redirecting financial and technical support away from government agencies—which are often viewed as co-opted or ineffective in promoting genuine democratic reform—directly to CSOs and independent media outlets. Particular emphasis was placed on supporting organisations operating in Georgia's regions and those engaged in grassroots community mobilisation, as these are often underserved yet critical for broader societal engagement (GE 48, 2025; GE 55, 2025; GE 42, 2025). One respondent, representing a business consulting association, strongly advocated for CSOs and private sector entities to become the main beneficiaries of international aid, rather than government bodies (GE 48, 2025).

- **Flexibility and Responsiveness in Funding:** Donors are encouraged to adopt more flexible and responsive funding mechanisms, recognising the challenging and often repressive conditions under which CSOs and independent media currently operate. This could involve simplifying bureaucratic procedures, providing core institutional support rather than solely project-based funding, and being adaptable to rapidly changing circumstances on the ground (GE51, 2025).

- **Countering Disinformation:** Support for independent media and civil society initiatives that work to counter sophisticated disinformation campaigns and provide citizens with access to diverse and reliable sources of information is deemed essential. This is particularly crucial in regions that may be more vulnerable to state-controlled or foreign-sponsored propaganda (GE48, 2025; GE42, 2025).

- **Protection and Solidarity:** International actors are called upon to provide robust political and practical support to protect activists, journalists, and CSO staff who face harassment, intimidation, and legal persecution, especially under restrictive laws like the "foreign agents" legislation. This includes public advocacy, diplomatic interventions, and emergency assistance programmes.

3. **Promoting Economic Diversification and Reducing Harmful Dependencies:**

Respondents highlighted the need for policies that support Georgia in reducing its economic vulnerabilities, particularly its over-reliance on Russia and other politically risky partners (GE 47, 2025; GE 54, 2025). Assistance in fully and effectively leveraging the DCFTA with the EU, by helping Georgian SMEs meet European standards and identify viable market niches, is seen as crucial (GE 49, 2025). Furthermore, encouraging and facilitating investment from a diverse range of democratic countries could help counterbalance the growing influence of actors like China and ensure that economic partnerships align with Georgia's broader democratic and strategic interests (GE49, 2025; GE 54, 2025). Support for developing Georgia's transit and logistics potential, particularly through the Middle Corridor, should be pursued in a manner that benefits the broader economy and strengthens sustainable ties with Europe and other democratic partners (GE49, 2025).

4. **Enhancing National Resilience (Military, Socio-economic, Political):**

- **Military Resilience:** There are calls for continued, and possibly enhanced, international support for strengthening Georgia's defence capabilities. This should focus on developing a comprehensive defence model, acquiring modern equipment, providing advanced training, and building robust reserve forces. The EU could potentially play a larger and more strategic role in this area, including through expanded use of the European Peace Facility for relevant security assistance (GE50, 2025).

- **Socio-economic Resilience:** Policies should address the root causes of poverty and inequality through targeted social programmes and support for inclusive economic growth strategies that benefit all segments of the population (GE55, 2025). Assistance is also needed in developing national mechanisms to mitigate the risks from economic shocks (such as potential instability in the real estate sector) and to manage the potential negative impacts of international sanctions, should they become more widespread (GE54, 2025). Crucially, support for anti-corruption measures and the promotion of transparency in business and public governance are seen as fundamental to building long-term socio-economic resilience (GE54, 2025; GE55, 2025).

- **Political Resilience:** The EU is urged to be "more bold" in its political engagement, utilising its full range of diplomatic and economic leverage. This includes the clear application of conditionalities for assistance and the targeted use of sanctions against individuals responsible for undermining democracy and human rights (GE 47, 2025; GE 51, 2025; GE 42, 2025). External partners could also play a role in facilitating constructive dialogue among Georgian political actors and supporting efforts to build a national consensus on essential reforms and the country's future strategic direction (GE 55, 2025). There is also an appetite for supporting new, emerging democratic political actors and movements that could offer fresh leadership, indicating a disillusionment with parts of the established political opposition and a recognition that genuine democratic renewal might require bottom-up mobilisation (GE51, 2025).

The policy suggestions collectively point towards a need for the EU and other democratic partners to adopt a more explicitly "political" and less purely "technical" or "bureaucratic" approach to Georgia. This approach would need to acknowledge the deeply contested nature of its current democratic path and demonstrate a willingness to actively support democratic values and actors, even if such a stance strains relations with the incumbent government. The convergence of these recommendations across multiple interviews underscores a shared perception among many Georgian stakeholders that traditional aid mechanisms focused on state-to-state cooperation may be insufficient or even counterproductive in the current context of democratic erosion and state capture.

3.7. Conclusion

The perceptions of external influences in Georgia, as articulated by a range of stakeholders in early 2025, paint a picture of a nation at a critical juncture, grappling with profound internal challenges to its democratic trajectory and a complex, often threatening, external environment. The findings of this research underscore a deep societal aspiration for European integration, juxtaposed with significant anxieties about the country's current governance and its vulnerability to malign external pressures.

The Russian Federation is overwhelmingly perceived as the primary and most multifaceted threat to Georgia's sovereignty, democratic stability, and economic well-being. This threat is understood to operate through direct military pressure, including the ongoing occupation of Georgian territories, as well as through economic leverage derived from growing dependencies, and sophisticated hybrid warfare tactics. These tactics include disinformation, support for anti-Western political forces, and the exploitation of internal vulnerabilities, often perceived to be facilitated by, or aligned with, the actions of internal political actors.

The European Union remains the principal focus of Georgia's geopolitical and civilisational aspirations for a significant majority of its populace. EU integration is widely viewed as the cornerstone for democratic consolidation and sustainable development. However, this aspiration is increasingly tinged with disappointment and concern over the current Georgian government's democratic backsliding and its overt moves to stall the EU accession process. The EU itself is seen as a crucial partner, yet its responses to Georgia's crisis are often perceived as insufficiently robust, overly bureaucratic, or slow to adapt to the rapidly deteriorating situation. There is a strong call for the EU to be more assertive in upholding democratic values in Georgia.

Perceptions of the United States are marked by uncertainty. While historically a key strategic ally, recent shifts in US foreign policy and a perceived decrease in active engagement have led to questions about its reliability as a steadfast partner in Georgia's democratic and security efforts. The potential implications of future US administrative changes add another layer of unpredictability.

China's growing economic influence is viewed with a characteristic ambivalence. It is recognised as a source of potential investment and economic diversification, particularly in infrastructure and transit. However, these opportunities are weighed against concerns about the risks of unsustainable debt, opaque business practices, and the geopolitical implications of deeper alignment with a non-democratic global power, especially at a time when Georgia's commitment to Western democratic norms is wavering. Türkiye is acknowledged as a significant regional economic partner and a vital NATO ally for Black Sea security, though its own complex geopolitical balancing act adds nuances to its perceived role.

3.7.1. Highlighting Striking or Recurrent Themes

A particularly striking and recurrent theme is the internal-external nexus in shaping Georgia's challenges. External threats, especially those emanating from Russia, are consistently described as being deeply intertwined with, and often actively enabled by, internal political dynamics. The actions and perceived allegiances of the current Georgian Dream government are frequently cited as facilitating external malign influence, with the narrative of "state capture" being central to this understanding. This suggests that Georgia's vulnerabilities are not solely the result of external pressures but are significantly amplified by domestic governance failures and political choices.

The profound crisis of democratic governance stands out as the most immediate and critical challenge. This is manifested in the contested October 2024 elections, the enactment of the "foreign agents" law aimed at suppressing dissent, the systematic weakening of independent institutions, the repression of protests, and the government's decision to halt EU accession talks. These developments are not seen as isolated incidents but as part of a broader trend towards authoritarian consolidation.

The interviews also highlight a significant vulnerability and resilience dichotomy. Georgia is perceived as highly vulnerable across military, socio-economic, and political spheres due to a combination of external pressures and internal weaknesses. Yet, respondents still believe in the presence of a strong societal resilience, rooted in a deeply ingrained pro-democratic and pro-European public sentiment and an active, albeit besieged, civil society. The central question emerging from the interviews is whether this societal resilience can be effectively mobilised, supported, and translated into a counterforce against the prevailing negative trends. The government's narrative of maintaining "peace" by accommodating Russia, contrasted with the societal demand for democratic freedoms and Euro-Atlantic integration, represents a fundamental conflict over the nation's future identity and strategic direction (GE47, 2025).

3.7.2. Overall Assessment of Georgia's Trajectory

Georgia is navigating a perilous path. The democratic gains achieved in previous decades are under severe threat, and the country's long-standing geopolitical orientation is being actively contested by powerful internal and external forces pushing it away from its declared Euro-Atlantic aspirations. The events of 2024–2025 appear to mark a watershed moment, with actions taken by the government significantly damaging trust with Western partners and alienating a substantial segment of its own population. At the same time, opposition parties have consistently failed to present a credible alternative vision to the electorate — particularly on critical issues such as the preservation of peace, the avoidance of military escalation with Russia, and Georgia's long-term socio-economic development. Their simplified narrative, which frames the political contest as a binary choice between Europe and Russia, has struggled to resonate with large segments of the population and has done little to assuage widespread public anxieties over the potential spillover of war into Georgia.

The crisis in Georgia also poses a significant test for the European Union's credibility, strategic autonomy, and commitment to its values in the Eastern Neighbourhood. A failure to effectively support democratic aspirations in a country that has long been a proponent of EU integration could have a chilling effect on pro-EU movements elsewhere in the region and might inadvertently embolden autocratic regimes. The calls from Georgian stakeholders for more decisive EU action reflect the high stakes involved. This situation also exposes two profound dilemmas for the European Union. First, how can the EU effectively promote democratisation in Georgia without inadvertently undermining its broader geopolitical objectives in a strategically vital region? And second, how can the EU provide credible deterrence and security assurances to vulnerable in-between countries like Georgia during the precarious transitional phase of EU accession—especially when these countries lack any formal Western security umbrella, and their very aspirations for EU membership are viewed by Russia as potential casus belli?

Ultimately, Georgia's democratic crisis extends beyond the ruling party's aspirations for authoritarian consolidation. While political power struggles dominate the surface, the deeper, more entrenched issues lie in the country's persistently low levels of political culture, widespread public distrust, deep political polarisation, and a pervasive zero-sum mentality. These structural impediments have long hindered democratic consolidation, rendering changes in leadership insufficient as guarantees for genuine democratic progress. Without addressing these foundational problems, Georgia risks remaining trapped in a recurring cycle of illiberal governance, regardless of who holds formal power. The implications of this systemic deadlock

reach far beyond electoral outcomes, shaping Georgia's societal trajectory, regional posture, and integration into the democratic international order.

Without a significant positive shift in domestic political dynamics, characterised by a renewed commitment to democratic principles and the rule of law, and a more robust, strategically aligned, and timely response from democratic international partners, including credible deterrence against Russian threats —particularly the European Union—Georgia risks further authoritarian consolidation and deeper entrenchment within a Russian sphere of influence. This would effectively mean the forfeiture of its European future. The capacity of Georgian civil society and pro-democratic political forces to resist these trends, coupled with the willingness of external democratic actors to provide meaningful, adaptable, and courageous support, will be decisive in shaping Georgia's trajectory in the critical years to come.

3.8. References

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Interview GE42		19 February 2025.
Interview GE43		23 December 2024.
Interview GE44		20 February 2025.
Interview GE45		25 February 2025.
Interview GE47		12 March 2025.
Interview GE48		20 February 2025.
Interview GE49		11 March 2025.
Interview GE50		14 January 2025.
Interview GE51		20 February 2025.
Interview GE52		06 March 2025.
Interview GE53		19 February 2025.

Interview GE54		21 February 2025.
Interview GE55		20 February 2025.

3.8.2. Focus Group Discussions

Focus Group Discussions	Group	Date
Focus group discussion with experts	Expert representatives of academia and civil society	
Focus group discussion with citizens	Miscellaneous group of citizens	

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4. KOSOVO

Jeta Loshaj

4.1. Introduction

The issue of external influence in Kosovo resurfaces periodically, but it most often does so when the security situation is at stake. Some 26 years since the end of the Kosovo War and just under 20 years since the declaration of independence, Kosovo maintains a relatively stable security atmosphere. However, certain internal and external events and conditions have indicated that Kosovo is not immune either to security risks, or to foreign malign influence. The unresolved dispute with Serbia, Kosovo's unfinished consolidation of its statehood, the Western Balkans' incomplete and stagnated Euro-Atlantic integration, as well as the changing global order in the recent years are just some of the aspects that explain Kosovo's vulnerable position and its proximity to being a target for external influence. Therefore, such circumstances lead to an understanding that the risk perception has been increasing as geopolitical events become more uncertain and more unpredictable.

To begin with, there appears to be a certain level of awareness by experts, the government, and even citizens when it comes to the assessment of external influence in Kosovo. This awareness can best be explained by looking at two sides of a spectrum. Namely, on the one hand, some experts argue that foreign influence in Kosovo is overstated, and that the country is not as prone to foreign malign influence as some would argue, particularly because of the heavy international presence of the Western actors, such as NATO and the EU (from hereon after referred to as "the West"), since the end of the war. On the other hand, other experts argue that foreign influence is understated and that it should not be overlooked, particularly due to the open security threat that comes from Serbia and its role as a foothold for malign actors such as Russia. The latter has constantly been invested in breaking the Euro-Atlantic consensus on Kosovo's independence and in dismantling Western unity, which, as local experts argue, is already on the brink of shattering.

This research paper will show that there is some truth on both sides of the spectrum. In other words, there is a blend of different actors that exert influence in Kosovo, but the dominating actors remain the Western partners because Kosovo has relied and continues to rely heavily on US and NATO/KFOR support. However, while NATO's presence is perceived as overwhelmingly positive in Kosovo, some argue that it comes with certain costs. Namely, there are actors such as Russia who do not wish to see Kosovo and the Western Balkans fully consolidated and integrated in Euro-Atlantic structures, which is why they have been and continue to be invested in disrupting this path, not only for Kosovo, but for the entire Western Balkans region.

Moreover, apart from security or military threats, Kosovo faces additional challenges that have proven difficult to overcome. Those challenges include socio-economic and political threats. While Kosovo has a relatively young population, where the average age is 34 years old, the latest census showed that there has been a decrease of the population from 1.8 to 1.5 million people. That is mainly because of the constant trend of migration. In addition, inflation, informal economy, and the overall limited unsustainable economic development have not made life attractive for Kosovo's youth to decide to see their future in the country.

Furthermore, in terms of political stability, one can argue that Kosovo enjoys political pluralism for the most part and that electoral processes are generally perceived as democratic. However, an important topic that affects political threats in Kosovo is the process of normalisation of relations with Serbia, which is one of the key challenges that Kosovo politicians are faced with and lack common understanding on resolving. The fact that this process translates into how certain policies are introduced in the north of Kosovo has recently led to rifts with the European Union, whereby the latter imposed punitive measures against Kosovo. For this reason, Kosovo is facing economic consequences – loss of EUR 600 million of EU funds – since the measures were introduced in 2023. Therefore, while political parties in general do seem to be unified on working towards Kosovo's path towards Euro-Atlantic integration, there is little domestic coordination on the means and concessions that Kosovo has to make in order to unlock that path, which has oftentimes resulted in political polarisation. This paper argues that the high-level political polarisation has nonetheless not affected the population to the level of leading to a domestic conflict.

There is, however, a need to have more social cohesion and inclusiveness, particularly in breaking gender, ethnic, religious, and racial stereotypes within Kosovar society and understanding the predispositions as stipulated in the Kosovo Constitution, which has an inclusive approach. Finally, tendencies to slip into nationalist, populist, and conservative rhetoric are not excluded from a risk that could potentially affect the society in the near future. The role of civil society, media, and the EU are seen as particularly important in serving both as watchdogs of democracy and human rights in Kosovo. However, the research shows that their role leaves much to be desired. First, while the role of civil society is generally appreciated, certain organisations are perceived as being affected by donor-driven agendas. Second, while there is media plurality in Kosovo, some platforms seem to disregard ethical reporting standards and have resulted in spreading disinformation. On disinformation in particular, the research shows that it is both an internal and external threat, with the latter coming mainly from Russian-backed Serbian media.

Finally, while Kosovo has traditionally demonstrated unequivocal support for the EU both at the societal and political level, the double standards by the EU as perceived by the population, policy makers and experts, call for a recalibration of the EU's approach towards Kosovo, and especially on the Kosovo-Serbia Dialogue. The sanctions against Kosovo, due to the situation in the north of the country, where Serbia is also an important factor, has signalled to Kosovars that they are more vulnerable and therefore have not been treated on equal footing by the EU, harming the process of integration and enlargement itself.

Therefore, navigating between security risks, economic instability, and political challenges in Kosovo and how these risks are intertwined is what lies at the core of this paper. The research also seeks to investigate the level of resilience Kosovo has shown to the risks it is exposed to, the impact they have had on the Kosovar society, and whether there are investments, efforts and capacities by governmental actors to manage these risks in the future. Moreover, additional questions that the paper raises include whether there are only external threats or also internal ones. While the process of building an internal whole-society resilience and cohesion seems like a bumpy road, influence and hybrid threats from outside raise growing concerns for policymakers. How Kosovo can catch up with the fast-developing trends of Artificial Intelligence, the constantly growing emigration, and the shattering of a once taken for granted global order that existed when Kosovo was liberated and was given its path for independence, raise a number of questions as to how Kosovo can tackle various threats in the future.

4.1.1. Methodology

To receive a comprehensive overview of perceptions on threats that Kosovo is exposed to, the research process for this report included mainly primary research. Some 17 interviews and two focus group discussions were conducted. The interviews included three university professors focusing on international relations and socio-economic subjects, seven civil-society representatives, with whom all security, socio-economic, and political threats based on their respective expertise were elaborated. One of the interviewees was from the Kosovo-Serb community, where s/he spoke about the position of the Kosovo-Serb community and how their role plays into the security, socio-economic, and political threats. Furthermore, five interviews were conducted with representatives from state institutions, such as political advisors, members of parliament, and the Director of Crime Investigation from the Kosovo Police, as well as political parties' representatives. Interviews were conducted also with former Kosovo diplomats and with representatives from the Council of Europe. The interviews were conducted by the field researchers in Kosovo as well as by members of the REUNIR consortium. Apart from one interview that was conducted online, all other interviews were conducted in person.

Whereas the focus group discussions were conducted in groups of two. Namely, the first focus group discussion included citizens, students, young activists, and freelancers. The second focus group included university professors, security experts, civil servants, economists, and representatives from the civil society (See Table 1 for more information). It was during the focus group discussions where there was more debate on certain issues, particularly on how the Kosovo society perceives certain developments. That is, whether there is capacity and willingness to mobilise and address certain problems that concern the entire country. Most interviewees and focus group participants emphasised that debates on topics concerning either security, economy, or politics in general are important. However, discussing these topics seems to be confined within certain groups alone which do not always reach the audience which may be most vulnerable. Embracing a more inclusive and understandable approach to all levels of society when discussing sensitive topics, not only those related to security, but also those related to the economy is a message that some interlocutors aimed to deliver during the interview process.

Lastly, REUNIR ethical standards were maintained throughout the field research. Informed consent was obtained from all participants. The consent form was sent in advance for their information, and they were also given a paper copy before the interview or the focus group discussion. All citations in the paper have been anonymised. The interviews and focus group discussions were voice recorded and safely stored.

Table 1. List of interlocutors in interviews and focus group discussions by category and by gender

Kosovo	Interlocutors	Number
	Academia	4
	Civil Society	16
	State Institutions	3

	Private businesses/chambers of commerce	1
	Political Parties	2
	Other (specify)	6
	Women	**13**
	Men	**19**
Total		**32**

4.2. Perceptions on external actors in Kosovo

4.2.1. Context

Over the past few years, at least since the Covid-19 pandemic in 2020, Kosovo's resilience to external threats, be that on the security, socio-economic, and political level became a topic for discussion at large. The pandemic in particular indicated a certain interest of the society to navigate how the government would address a threat that caught the entire world by surprise. Just as the pandemic crisis was looming, prior to which a controversial land swap deal (The Guardian, 2018) with Serbia was allegedly discussed informally between senior leaders in Kosovo, Serbia, and Albania, Kosovo was faced with additional domestic problems, such as changes in government, which led to having snap elections twice in less than two years. A new government with a majority by the Self-Determination Movement Party (Lëvizja Vetëvendosje) led by Prime Minister Albin Kurti took office in February 2021 to complete a full mandate until February 2025. Kurti took office on promises that jobs and justice would be delivered, and that the Dialogue with Serbia would not be among his top priorities.

However, this issue became one of the central concerns of the Kurti government. In its efforts to establish the rule of law throughout the entire territory of Kosovo—including the four northern municipalities with a Serb-majority population—the government encountered significant resistance. These municipalities have long been perceived as being under Belgrade's influence, largely due to their geographic proximity to Serbia and the considerable control exerted by Serbian President Aleksandar Vučić over the local political entity, *Lista Srpska* (Serbian List). The government's actions triggered a serious backlash in the north, leading to the mass resignation of Serb mayors from Kosovo's institutions and a subsequent boycott of local elections by the Serb community. Kurti's assertive (KCSS, 2025) and sovereigntist approach towards the north of Kosovo also resulted in backlash from Washington, Berlin, Paris, and Brussels. The latter even introduced punitive financial measures (GLPS, 2024) (*de facto* sanctions) to Kosovo in 2022, which have not been lifted yet. Tensions between Kosovo and Serbia culminated when a group of Serb militants launched a terrorist attack (European Parliament, 2023) in the Banjska Monastery in Kosovo in September 2023, which resulted in the death of a Kosovo Police Officer. A former Kosovo diplomat argued that Banjska was a "Donbas scenario,"

(KS119, 2025) as did many additional interviewees for this paper. This event led to further deterioration of Kosovo-Serbia relations.

Throughout these years, additional challenges at the global level emerged, with the main one being the Russian full-scale invasion of Ukraine. The Western Balkans, a region where disputes such as those between Kosovo and Serbia are unresolved, and where the memory of war is still fresh in the minds of the populations, felt the impact (FES, 2024) of this war. Thus, as the war in Ukraine revived classic geopolitics, it redefined security challenges in the already troubled region of the Western Balkans. While Kosovo immediately showed solidarity with Ukraine and maintained its alignment with the EU's Common Security Foreign Policy, Serbia's reluctance to do the same, coupled with what is sometimes perceived as malign influence in Kosovo, Bosnia and Herzegovina (EUI, 2025) and Montenegro (EUI, 2025) caused security uncertainty for the region. Moreover, a new United States Administration and the fear of a potential crack in Transatlantic relations causes fear for a security vacuum, which the Western Balkans, and particularly Kosovo cannot afford. As a former minister of the Government of Kosovo with knowledge on foreign affairs argued, "the biggest threat is that the international order which created Kosovo no longer exists" (KS112, 2025). Therefore, how Kosovo proves to be resilient to these events remains a puzzling and concerning topic for policymakers.

The overwhelming presence of security threats at the domestic and the global level such as the above-mentioned have led to a situation where other important topics such as socio-economic development was overlooked by the Kosovo Government. An unemployment rate of 10.9 %, a poverty rate of 19.2 % (EU Balkan News, 2025) (the highest in Europe in 2024), and a migration trend of 1 % of the population leaving the country each year since 2016 (KS200, 2025), are some statistics that provide a concerning picture as to where Kosovo stands in terms of socio-economic development. Moreover, while employment opportunities exist, interviewees raised concerns about the quality of jobs, the treatment of employees, and the prevalence of economic informality. Investing in the economy and social wellbeing has only theoretically been addressed in programmes of political parties, argues civil society activist working on social policies (KS120, 2025). When people do not have satisfactory working conditions and social welfare, they become more prone to conflict or are encouraged to leave the country.

Finally, one element that many interlocutors emphasised was the lack of social cohesion within Kosovar society. While there is limited understanding about coexistence between different ethnicities in Kosovo, interethnic relations in Kosovo have proven to be resilient despite the political perception, according to a civil society activist and expert on Kosovo's foreign policy (KS124, 2025).

By assessing the military, socio economic and political threats that Kosovo faces, we see how security and the bilateral dispute with Serbia takes centre stage, often at the detriment of other real issues for citizens. However, there are also areas of resilience which Kosovo and its partners can build on in order to ensure its stability and its democratic consolidation.

4.3. Military threats, opportunities and resilience

Two significant events in recent years showcase Kosovo's vulnerability to military threats, both internally and externally. The first is the terrorist attack in Banjska in September 2023, which occurred inside Kosovo's territory but was orchestrated by both internal and external groups consisting of Serb militants. The second

event is the war in Ukraine and the constant fear of spreading ripple effects for the Western Balkans. Many interviewees argued that any epilogue of the war in Ukraine might replicate how the Kosovo-Serbia Dialogue ends up as well (KS124, 2025).

The so-called geopolitical recession was another overly emphasized phenomenon mentioned by many interviewees during the research process. US President Trump's transactional approach and his focus on ending conflicts through quick deals and without much consideration of the implications, the emerging clash between the US and the EU, and a fear of a potential withdrawal of US troops from Kosovo are all points that pose security threats to Kosovo. Nonetheless, while these threats are perceived as more speculative and distant, Serbia remains the biggest military threat without excluding the external influence that comes from Russia. China and Türkiye, on the other hand also appeared as influences that should not be overlooked, despite the fact that their presence is limited and considered as mainly harmless respectively. The manifestation of hybrid threats, disinformation campaigns, ideological influences, and other types of soft power – and to an extent hard power - are threats that exist both internally and externally in Kosovo. With all these elements in mind, it can be argued that the risk perception over the last few years has dramatically transformed in Kosovo.

Beginning with Serbia, most interlocutors mentioned that while Kosovo does not have any disputes with any of the countries in the Western Balkans, Serbia remains the main open threat. Apart from the diplomatic warfare of refusing to recognise Kosovo's independence and leading a proactive global campaign of derecognising Kosovo, Serbia has tools through which it threatens Kosovo on the military front as well. In its official state documents such as the National Security Strategy (KCSS, 2025) Serbia reflects an aggressive posture towards Kosovo because it still treats it as part of its territory, has a sceptical attitude towards the West, and has strengthened economic and military cooperation with Moscow and Beijing.

Nevertheless, while most interviewees agreed that Serbia poses the biggest threat to Kosovo, they were somewhat divided on the extent to which Serbia would be ready to launch a full-scale attack. For example, one interviewee argued that "Serbia still has the old option on the table", (KS122, 2025) namely, that Serbia still hopes to annex Kosovo through military means. Serbian President Vucic's public statements, such as the one that Serbia is waiting for an Azerbaijan moment (KSFG01, 2025), also leads one to think that Belgrade is indeed waiting for the conditions to ripen and start a war. Moreover, an advisor for the Government of Kosovo with knowledge on foreign policy said that Serbia has 48 Forward Operating Bases (FOBs) surrounding the 400 km-long border that the two countries share (KS116, 2025).

On the other hand, some interviewees argued that while Serbia's posture towards Kosovo is undoubtedly threatening, Belgrade is not interested in starting an all-out war. Namely, they posited that Belgrade's main purpose is to keep Kosovo unstable and to delegitimise its statehood by tightening its grip on the Kosovo-Serb community through which it projects power (KS126, 2025). A Kosovo-Serb civil society activist added that "it would be unimaginable that Serbia would take any action towards Kosovo, especially in these circumstances. But the fear of tension exists particularly because of how recent the conflict was" (KS117, 2025). The data shown in this research paper indicate that Serbia has indeed refused to refrain from an aggressive posture towards Kosovo, and while it remains unclear as to how far it would go to start a full-scale war beyond provocations and some isolated attacks, there is fear over tensions.

Since the International Court of Justice's (ICJ) opinion on Kosovo's Independence in 2010[7], consecutive provocations and attacks inside Kosovo launched by Serbian-affiliated structures have indicated that the risks are imminent and perhaps can even be repeated in the future. To name a few: at an attempt by Kosovo authorities at exerting control in the north of Kosovo, a Kosovo Police Officer was killed in 2011 (Balkan Insight, 2014) by Serbian militants. In January of 2017, Serbia sent a train (DW, 2017) containing hateful slogans towards Kosovo. Again in 2017, a controversial wall (Balkan Insight, 2017) was built in the already divided city of Mitrovica in the bridge, to be dismantled shortly after by Kosovar authorities. The situation remained relatively calm in the interim, considering that during the Covid pandemic movement was limited.

The situation escalated in 2023 when fears of renewed conflict resurfaced. A group of protesters – some of whom had come from Serbia – attacked KFOR/NATO soldiers during a demonstration aimed at preventing the newly elected non-Serb mayors from entering municipal offices in the northern municipalities. The protests erupted following a broader backlash against Prime Minister Kurti's reciprocal policies toward Serbia, which had led Serb mayors to resign from Kosovo's institutions and the Serb community to boycott local elections. In the absence of Serb participation, new mayors were elected with extremely low turnout, deepening the tensions and fuelling unrest on the ground. A few weeks later, Serbian authorities kidnapped three Kosovo Police officers close to the border between Kosovo and Serbia. The biggest security threat of all, as mentioned previously, was the Banjska terrorist attack in 2023 where a Kosovo Police officer was murdered, and three members of the militant group were killed. The leader of the attack was Milan Radoicic, a Kosovo-Serb who was Deputy Head of *Lista Srpska*, the main Serbian political party in Kosovo. Radoicic admitted responsibility for the attack and is now free (RFE, 2023) in Serbia. Serbian authorities refuse to extradite him to Kosovo. "Banjska was not a fresh plant," explained a former diplomat. "It had hallmarks of the Little Green Men of Crimea aimed at creating a new momentum – an attack which had the green light from Vucic," the interlocutor added (KS119, 2025).

Indeed, the collection of ammunition (Balkan Insight, 2023) that was found served as proof that this attack was carefully planned, and had it not been handled by the Kosovo Police and KFOR, it would have likely escalated into a serious security crisis with broader regional implications. The most recent attack was in the water canal (Politico, 2024) of Iber Lepenc in Zubin Potok in November 2024, one of the municipalities in the north of Kosovo. While Serbia denied involvement, Kosovo authorities hold Serbia responsible for this attack which would have risked water access to 700 000 inhabitants in Kosovo. This event showcased another example of Kosovo being vulnerable to serious terrorist attacks, including in critical infrastructure (KSFGD02, 2025).

As the irregular troops that orchestrated these attacks have reportedly left Kosovo, interviewees explained that they were one of the main tools through which Serbia manages to maintain its presence in Kosovo. The Serbian Government, according to an interviewee working in the Kosovo Police, kept the north of Kosovo under control since the end of the war (KS123, 2025). There are three different structures that operate: illegal parallel structures, organised crime groups, and extremists (KS123, 2025). Groups (Balkan Insight, 2023) such

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[7] In its 2010 advisory opinion, the International Court of Justice concluded that Kosovo's declaration of independence did not violate international law or UN Security Council Resolution 1244.

as *Civilna Zastita* (Civil Protection) which had direct connections with the Ministry of Defense of Serbia, numbered around 4 000-6 000. While these groups seem to have left Kosovo, Serbia's President Vucic continues to try to hold his grip on the Serbian population in Kosovo by aiming to create a narrative that they are in danger. "Similar to Russia, they (Serbia) believe that you cannot be a Serb outside of Serbia and you cannot live as a minority," argues a political advisor to the Government of Kosovo (KS116, 2025), a point complemented by a former diplomat, who stated that Serbia's attempts to create the *Srbski Svet* (Serbian World*)* is an aspiration that is very much alive in Belgrade's mind (KS119, 2025), which is why countries such as Kosovo and Bosnia and Herzegovina have reasons to worry.

Indeed, apart from hard threats, Serbia has also employed a soft power weapon spread out through proactive disinformation campaigns aimed at portraying Kosovo as an unsafe place to live for non-majority communities. A high-ranking government official in the Kosovo Government with knowledge on foreign affairs, argued that disinformation is one of the main threats against Kosovo, for which he admitted that the Government needs to invest much more in tackling (KS118, 2025). The official Russian channels such as Russia Today and Sputnik (RSF, 2024), operating in Serbia, have constantly spread anti-Kosovo narratives. Therefore, while Serbia alone is deeply invested in delegitimising Kosovo's statehood, it enjoys support from other actors as well, including Russia. In many ways, the latter's playbook (Prishtina Insight, 2023) is still used by Serbia's policy towards its neighbours.

Explaining Russian influence in Kosovo is a difficult task given that Prishtina and Moscow do not enjoy diplomatic relations due to the latter's refusal to recognise Kosovo's independence. However, evidence of indirect Russian influence in Kosovo shows that despite the lack of diplomatic relations between the two countries, Kosovo appears in Russia's radar when opportunities arise. Interviewees explained that Russia may not have a big strategic interest in the Western Balkans, but the Kremlin attempts to impede the integration of the region in Euro-Atlantic structures. The fragility of the security situation in the region works well in Russia's interests. As long as these crises are alive and Russia nurtures them, it causes trouble for the West. For the Western countries, more trouble in the Western Balkans means less focus on Ukraine. Such diverted attention makes decision-making harder, and in return gives a freer hand to Russia to exploit and maximise its war in Ukraine, explained a professor of International Relations and former diplomat (KS113, 2025).

Another example that showcases Russia's opportunistic approach towards the Western Balkans, and in particular Kosovo, is Kosovo's independence. Russian President Vladimir Putin through his speeches (YouTube, 2022) has traditionally used the NATO intervention in Kosovo in 1999 and Kosovo's declaration of independence as precedents to justify both the annexation of Crimea and now the full-scale invasion of Ukraine, as well as in the cases of South Ossetia and Abkhazia. Putin accuses the West of double standards and tries to discredit the West by portraying Kosovo as a failed state. In the absence of economic and diplomatic relations between Prishtina and Moscow, Russia's most successful tool in exerting its influence in Kosovo has been through its foreign policy discourse (KCSS, 2024) in over 100 official statements and hybrid threats such as disinformation. Those statements revolve around four main narratives: that NATO's intervention in the Kosovo War is self-interested and hypocritical; that Kosovo is not a legitimate state under international law; that Kosovo is a centre of organised crime and instability; and that the West uses Kosovo to isolate Serbia and expand its influence. Russian media such as Sputnik and Russia Today operating in Serbia proactively seek to spread propaganda about Kosovo. By exploiting the already fragile situation in the north

of Kosovo, Russian media specifically target the Kosovo Serbs and try to spread fear among them, by causing further internal division within Kosovo.

Therefore, most interviewees were alert that Kosovo is under Russia's radar, and it remains to be seen how things unfold. It appears that there can be at least two scenarios: First, Russia can be a problem to the point where it can encourage or enable Serbia to do something (KS119, 2025). As long as Serbia serves as a foothold for Russian presence and there is no progress in an agreement between Kosovo and Serbia, interlocutors fear that Kosovo will continue to be used as a chessboard (KS124, 2025) by Russia for advancing the Kremlin's own interests and for trying to manipulate with international norms.

Russia's refusal to recognise Kosovo, however, goes beyond the Kremlin. That is, Kosovo's quest to join the UN is blocked by Russia, as well as by China. However, compared to Russia's goals for using Kosovo for its own gains in its fight for multipolarity against the West, China does not appear to have such ambitions. A former diplomat argued that China sees Kosovo as a European problem (KS119, 2025). Indeed, most of the interviewees agreed that Kosovo is not under China's radar either directly or indirectly. Beyond some commercial relations between the private sector in Kosovo and China, there are no diplomatic relations between the two (KS124, 2025). Some interviewees nonetheless see China's relations with Serbia as problematic. For example, Xi Jinping visited Serbia on the anniversary of the NATO bombing of Yugoslavia, when the Chinese Embassy was bombed as well (KS116, 2025). This event was aimed at spreading messages against NATO and the EU. Therefore, while there appears to be little or no evidence of any risk materialising from China in Kosovo, China is nonetheless not perceived as an ally of the region.

Another actor for external influence that was brought up by the interviewees was Türkiye. Interviewees had mixed interpretations on the role of Türkiye in Kosovo, but the dominant narrative was that Türkiye is perceived as an important regional actor and an ally. The general consensus was that Türkiye and Kosovo have good relations, and that the recent intensified military cooperation was perceived as positive. Türkiye's contribution to Kosovo's liberation, support for independence, and development aid make relations between the two countries positive. Indeed, Türkiye has invested significantly in Kosovo and holds important economic channels. These include management ([Daily News, 2013](#)) of Prishtina International Airport (managed by a Turkish-French firm), a few banks operating in Kosovo, a few hospitals, and other contributions through the development agency TIKA ([TIKA, 2011](#)). Türkiye's role, however, becomes debatable when it comes to its soft power influence potentially channelled through religious elements.

Türkiye's presence is mainly manifested through other types of soft power through investment in cultural and spiritual spheres, such as through the building of mosques and maintaining cultural heritage. While these derive from the historical aspect of the Ottoman Empire, the fact that the population of Kosovo is predominantly Muslim and a potential neo-Ottoman ([The Guardian, 2019](#)) influence attached to more religious affiliation is what some participants in the focus group discussion with experts emphasised as a potential concern (KSFGD02, 2025). As a former Minister of Foreign Affairs mentioned, "the threat from Türkiye could come only if they tried to change the nature of our society as a secular society" (KS112, 2025). An interviewee added to this by stating that Türkiye may have a strategy to increase influence through the revival of political Islam. This fear exists because of what happened in Kosovo in the early aftermath of the war, when countries such as Saudi Arabia and Qatar brought organisations that registered as NGOs and tried

to impose a more radical version of Islam, later delegitimised by Kosovo (KS123, 2025). Nonetheless, Türkiye does not appear to have a systematic approach to Kosovo and it is not seen as a replacement or an alternative. Namely, it could never replace the EU and its presence or power in Kosovo is not as decisive as the EU and/or the US. However, if, hypothetically, the situation got to the existential point of Serbia invading, and Kosovo would need Türkiye's help, that would come with certain conditions, such as overlooking disagreements on how Türkiye would be referred to in Kosovo's history textbooks, or overlooking disagreements on extraditing Gulenists (Reuters, 2018) to Türkiye (KS119, 2025). This "strings attached" policy could then be considered as influential, some interviewees argued (KS121, 2025).

The direct and indirect presence of the above-mentioned actors shows that Kosovo witnesses certain elements of foreign influence which, for the most part, do not have positive or peaceful ambitions. In most conversations, the presence of malign actors such as Serbia, Russia, and to a limited extent China are mitigated because of the heavy US and NATO presence in Kosovo. Most interlocutors constantly emphasised that Kosovo never considers alternatives other than NATO and the EU. However, with the current shift in the global order, it appears that despite KFOR's presence in Kosovo, the country has been subject to security threats that could escalate further. Banjska was properly managed, but that was mostly due to good coordination between KFOR and Kosovo Police. And while it was a serious threat, Kosovo took advantage of Banjska by eliminating the terrorist groups and establishing more control over the north of the country, which is what some interlocutors saw as positive (KS114, 2025). In this example, Kosovo proved to be resilient. However, there was an overall consensus that Kosovo is very weak on fighting disinformation. How these threats materialise in the future remains to be seen. There is confidence within Kosovo authorities, but also fear.

4.4. Socio-economic threats, opportunities and resilience

Kosovo's socio-economic stability is another issue which is under significant strain due to a complex interplay of internal challenges and external pressure. First, it is not just economic constraints that are at stake. Namely, there are problems with demographic decline, unemployment, informal economy, economic inequality and the constant trend of migration, which will be further elaborated in this subchapter.

Some interviewees also emphasised the lack of understanding of cultural and societal aspects of coexistence within Kosovo. This, as some argued, is due to the absence of a proper educational system, which has led to limited understanding of ethnic, racial, religious differences, and even gender roles. A limited discussion on such topics only makes a society more prone to lacking trust within and between communities and also makes fertile ground for disinformation. These aspects are part of internal challenges, for which institutions are called upon to take measures.

Elements of external pressure affect the socio-economic landscape in Kosovo as well, including disinformation, economic obstacles imposed by Serbia, limited intra-regional cooperation, and the stalled EU integration process. Other elements of foreign socio-economic influence include the role of the diaspora and its impact on remittances in Kosovo, as well as the foreign investments of countries such as Germany, Switzerland, and Türkiye.

Beginning with internal challenges, as mentioned previously, there is economic discontent in Kosovo. With a 10.9 % unemployment rate and 19.2 % poverty rate, Kosovo remains one of the poorest countries in Europe. As a civil society activist with knowledge on social justice and the economy explains, Kosovo's weak socio-economic situation in the post-war period can be attributed to the destruction of many industries and production facilities. "The socio-economic situation is significantly impacted by the broader security context in the Western Balkans, where economies are interconnected," she explained (KS201, 2025). She also used a gender lens to analyse the socio-economic situation in Kosovo. She highlighted that 30 % of Kosovo's economy is informal, and women are most vulnerable because they are mostly not registered as employees. On the issue of gender justice, she further argued that "policies are not targeted enough and it is a societal issue" (KS201, 2025). For example, women in rural areas lack access to factors that would facilitate their participation in the labour, and in most cases, they depend on their family members to travel.

Another important element explaining the socio-economic environment in Kosovo is the urban-rural division. The rural families receive and, in many cases, depend on remittances that come from the diaspora. While not precisely known, Kosovo has around 700 000 people who live in the diaspora, who still enjoy close ties with their families in the homeland. While the diaspora contribution boosts Kosovo's economic growth and is a "significant safety net for the country to help the balance of payment deficits" (KS200, 2025), it has its consequences as well, such as people not being urged to work as a result.

Another important aspect which makes Kosovo socio economically vulnerable is migration. Unsatisfactory working and living conditions urge people to leave the country. The constant narrative of war also makes it difficult for people to decide to stay. "We might come to a point where Kosovo might have jobs to offer but no workforce to engage, for which both security and working conditions are to blame" argued a civil society activist focusing on social justice and domestic political affairs (KS120, 2025).

Moreover, Kosovo is a multiethnic state, where there is a combination of different ethnicities and religions. In the early post-war period, there were cultural threats posed by some radical Islamic organisations, such as Wahhabi and Salafi background groups. That problem was addressed, but remnants and vulnerability were noticed when there were about 300 people from Kosovo who went to fight in Syria for Al-Nusra and ISIS (KS124, 2025). Problems with religious extremism are a result of a poor education system, explained a researcher on radical extremism (KSFGD02, 2025).

In terms of foreign socio-economic influence in Kosovo, as in the security aspect, the role of Serbia remains yet another obstacle to Kosovo, as explained by some of the interlocutors. Because of Serbia's refusal to recognise Kosovo and its state symbols, there are the so-called non-trade barriers imposed by Serbia, which disrupt Kosovo's ability to export to other countries. That is because in order for Kosovo to be able to access markets in Central and Western Europe, it needs to pass through Serbia, and Serbia's non-tariff trade barriers, such as customs, stamps, and documents certification make Kosovo's trade efforts difficult and raise costs. As a lecturer on economics explained, "in some cases, trade is outright blocked" (KS200, 2025).

Moreover, the bureaucratic economic hurdles are not the only models of obstruction that Serbia poses towards Kosovo. A crucial element for Kosovo's full consolidation of statehood is the integration of the Serbian non-majority population in the north. An important aspect of the social wellbeing in Kosovo is the multiethnic composition of the country. The security aspects mentioned in the previous chapter indicate that

there is a deep societal division within Kosovar society. Indeed, there are 38 municipalities in Kosovo, out of which 10 are populated by the Serb non-majority community, mainly concentrated in four municipalities in the north. The geographic position of these municipalities on the border with Serbia means that this population has been more strongly tied to Belgrade than to Prishtina. Serbian political parties such as *Lista Srpska* have enjoyed political monopoly over this population, which Kosovo government officials view as problematic (KS118, 2025).

Some interviewees explained that while the Serb community's ties to Belgrade are understandable, Serbia's pressure on this population is unjustifiable. Namely, Serbia has proven to be "more interested in territory than in their livelihoods because on the one hand, it tells them to ask for rights in Kosovo, while at the same time tells them to sabotage Kosovo as a state" a former diplomat claimed (KS119, 2025). Serbia's support for parallel structures in Serb-majority areas and lack of transparency in funding undermines Kosovo's governance and economic integration. Under Prime Minister Kurti, the Kosovo Government took a more assertive approach in trying to integrate the Serb community in Kosovo institutions by cancelling the parallel institutions without coordination with the Serb community and with the QUINT[8] countries. This caused discontent within the Serbian and with the international community, particularly with the EU, whereby the latter imposed punitive measures towards Kosovo, which, with the absence of financial support from the EU, have cost around EUR 600 million (GAP Institute, 2025) (out of which 7 million are permanently lost) for the last two years. Based on reactions by some of the QUINT embassies, e.g., German Embassy (Telegrafi, 2025) in Kosovo, Kurti's decisions to close the parallel institutions were legal but operationally wrong. A Kosovo-Serb civil society activist argued that the issue of the Serb community in Kosovo has not been treated fairly, and unless it is solved under the Kosovo-Serbia Dialogue, it will keep Kosovo, as well as the entire WB region isolated argued a Kosovo Serb civil society activist (KS117, 2025).

On additional foreign socio-economic influence in Kosovo, interlocutors explained that just as Kosovo's political path is oriented towards the EU, the economic one is the same. Kosovo has strong economic relations with the EU through the Stabilisation and Association Agreement (SAA) which was signed in 2015. The SAA facilitates trade liberalisation and alignment with EU standards. The EU is also Kosovo's largest trading partner and a key donor, providing significant financial assistance through the Instrument for Pre-accession Assistance (IPA). While Kosovo benefits from such elements, as previously mentioned, its path to EU membership is challenged by internal economic weaknesses and the lack of recognition by the five EU Member States. Due to the stalled Dialogue with Serbia, the EU imposing sanctions against Kosovo remains a concern for the interlocutors. As one of them explained "Political instability and lack of EU unity on Kosovo's recognition also hinder economic development. With five EU countries not recognising Kosovo, our EU integration process is slowed. Serbia continues to obstruct Kosovo's path, even though it was supposed to be a part of the negotiation process that they wouldn't do so" (KS201, 2025). Despite this, the EU remains vital to regional stability, with fears that a diminished EU presence could embolden local actors to provoke conflict and destabilise the region.

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[8] The QUINT countries—France, Germany, Italy, the United Kingdom, and the United States—maintain embassies in Kosovo and play a key role in coordinating Western policy on Kosovo's political and security developments.

Thus, there appears to be a mixed perception when it comes to challenges and resilience for socio-economic threats in Kosovo. A member of Parliament admitted that while the Kurti Government had pledged to invest more in the justice system, in education, health, new jobs and so forth, the focus was switched to more defence and security aspects and that it is forecasted that it will remain so due to the security threats Kosovo experienced in the recent years (KS114, 2025). A high-ranking government official with knowledge on foreign affairs argued that Kosovo has proven resilient to economic threats, despite the fact that there needs to be a whole society resilience. The diaspora is to thank for this as their remittances help to maintain social cohesion (KS118, 2025).

The majority of other interviewees, however, seem to disagree with this government's approach to maintaining economic stability, some even saying that economic threats are more concerning than the security ones (KS115, 2025). "Cash handouts are not a sustainable option" (KS121, 2025) argued a civil society activist in criticism of the hand-outs that the government has given for holidays for pensioners and new mothers. Another interviewee with economic expertise argued that in efforts to implement its social democracy programme the government introduced an "overemphasis on social schemes which created disincentives for formal employment" (KS200, 2025), pointing to the Kurti government increasing social spending at the expense of capital investments. And despite the social schemes, the programmes were not targeted effectively, offering blanket payments where it would have probably been better to allocate resources in more effective ways (KS200,2025).

Nevertheless, most interviewees would agree that for as long as the security situation is at stake, regardless of whether the government is to blame for the inefficient economic policies or not, and as long as the EU does not lift its punitive measures against Kosovo, Kosovo risks slipping into further economic instability for at least three reasons. Firstly, investors will hesitate to establish commercial relations with Kosovo due to both the lack of essential conditions and the fear of a potential conflict erupting. Secondly, economic discontent fuels populism and even makes people more prone to conflict, particularly at the interethnic aspect, as well as prone to controversial political ideologies. Third and lastly, economic frustration leads to people leaving the country, thus contributing to the constant migration trend that Kosovo continues to face.

4.5. Political threats, opportunities and resilience

Since the early aftermath of the war in the beginning of 2000, and more specifically, since the declaration of independence in 2008, Kosovo's democratic trajectory is another aspect that has revealed both strengths and weaknesses of the new state. Democratic mechanisms such as competitive elections, as well as the institutional separation of powers, have enabled the country to uphold formal democratic processes. Namely, Kosovo has succeeded in separating judicial, executive and legislative competences. Despite some challenges with fraudulent elections in the past, such as parliamentary elections in 2010 (The Guardian, 2010), Kosovo has run democratic elections with political party pluralism and overall fair processes in recent years. Nonetheless, Kosovo is not exempt from political polarisation, which, as this paper will show, has worsened, particularly in the most recent election. Political parties have mainly maintained centre-right, and in recent years, centre-left ideologies. However, a particular concern according to the expert interviews is the risk of radical political ideologies, such as nationalism, populism, and conservatism.

Apart from political parties, there are additional actors who play a role in the political arena in Kosovo. These actors include civil society, the media, and the international community (primarily the EU and the US).

The main political challenge is the non-consolidation of Kosovo's statehood and its international subjectivity, which pose numerous challenges and threats. An interlocutor explained that Kosovo is seen by a majority of the population as "a temporary project" (KS120, 2025). This means that on the one hand, a significant portion of the Kosovar-Albanian population aspires to see Kosovo unified with Albania. On the other hand, the non-majority Kosovar-Serb population aspires to be unified with Serbia. There is also another camp within Kosovar society labelled as "Kosovo-centric" (Remarker, 2019). This – is a group that accepts Kosovar identity, including state symbols and the composition of ethnicities. However, limited research has been conducted on this topic. Nonetheless, this "camp division" within society presents a problem, as not many in Kosovar society appear to have subscribed to *"Ahtisaarian"* Kosovo. The term *"Ahtisaarian"* refers to Kosovo being a multiethnic state, with a majority Albanian population and all other communities, such as ethnic Serbs, Bosniaks, Gorani, Roma, Ashkali, Egyptians, and Turks having rights guaranteed by the Constitution. The lack of understanding of Kosovo's Constitution leads to a lack of social cohesion with these different ethnic backgrounds, religion, and even distribution of wealth, a civil society activist with a focus on social justice explains (KS120, 2025). This, according to him, leads to a rising sense of general uncertainty, where as a result, the population can easily slip into narratives of nationalism as long as there is no bridging of the divide between communities.

Another major obstacle to the full consolidation of Kosovo's statehood is the ongoing challenge of integrating the Kosovo Serb community and the continued refusal of Serbia to recognise Kosovo's independence. This issue is further complicated by the fact that five EU Member States also do not recognise Kosovo, largely due to concerns tied to their own internal territorial disputes or separatist movements. The integration of the Serb minority is a central focus of the EU-facilitated Dialogue between Kosovo and Serbia, which has stalled amid growing tensions and periodic security incidents in the north. A key and unresolved issue within this dialogue is the establishment of the Association of Serb Majority Municipalities (ASM), intended to provide a formal mechanism for self-management for Serb communities within Kosovo. The government led by Prime Minister Kurti has expressed strong opposition to implementing the previously agreed ASM, citing concerns that it could entrench Belgrade's influence in the north and legitimise parallel administrative structures that undermine Kosovo's sovereignty. However, the government's assertive moves to extend full control in the north, such as deploying special police units and appointing ethnic Albanian mayors in Serb-majority areas, have led to increased tensions with the local Serb population and strained relations with the EU, which has urged more flexible and inclusive approaches.

Some interlocutors agreed that Kurti's measures were legally right, but the public messaging to the Serb community was absent (KS119, 2025). Likewise, the QUINT embassies have reiterated the same calls as well: that, for example, Serbia's parallel structures must be eventually removed, but they need to be coordinated and ensure a smooth transition for their replacement. While the government justified their actions as necessary to expelling Serbia's illegal structures and fight organized crime, the top-down approach left the communities it was supposed to protect in a precarious position. A civil society activist presents an alternative position in claiming that the ASM would be a good tool in institutionalising and making Serbia's support for the Serb community more transparent. The fact that Serbia has legal rights to finance certain aspects of life

for the Serbian community in Kosovo, as a civil society activist with a focus on social justice and domestic affairs explained, is a fact which many people in Kosovo are not aware of (KS120, 2025). Such miscommunication gave space to more disinformation from the media, and deepened lack of trust from the Kosovo-Serb population, as well as by the international community. Nonetheless, research shows that the antagonistic political atmosphere between the leaders of Kosovo and Serbia, the populations on the ground have remained resilient and have not resorted to conflict.

Within this context, it is important to elaborate on the role of the EU as both the key partner for Kosovo's future consolidation, as well as a mediator of the Dialogue with Serbia. Since the declaration of independence, politicians in Kosovo have participated in several EU summits, regional roundtables and other similar events, where Kosovo in many cases was not allowed to present its symbols due to the partial recognition. Similarly, in the Dialogue with Serbia, there is a perception that Kosovo is not treated as an equal party. As a former diplomat stated, "Kosovo has reached the limits of how much it can do without recognition" (KS119, 2025). In other words, Kosovo appears to have made many concessions without gaining much in return, such as recognition by the five non-recognising EU Member States, or a clearer path towards EU (or most preferably, NATO membership). Moreover, conditions such as establishing the ASM, which many fear will erode Kosovo's stability, will only be assuaged only with reasonable assurances for more security and EU support for Kosovo. The issue of ASM therefore remains as one of the most disputed topics both among political parties in Kosovo, and between Kosovo and the EU, whereby the latter, as previously mentioned, imposed political (and financial) sanctions towards Kosovo. All interlocutors argued that the sanctions against Kosovo must be lifted. Moreover, the fact that the sanctions have not been lifted for two years and the fear of seeing the EU distracted with other problems geopolitically, causes a major concern for Kosovo. As professor of IR and former diplomat noted, "Over the past five to six years, there has been a lack of the harmonisation of the vision as to what the future of Kosovo's status should be at the international level" (KS113, 2025).

Furthermore, on Kosovo's political composition, most interlocutors appeared to appreciate the pluralism that exists in the most part of the country. In the February elections of 2025, there were over 20 political subjects on the list (KS127, 2025). The elections were assessed as democratic. However, many interlocutors pointed to the deeply polarising language that existed between the political parties during the campaign. The deep polarisation is evidenced by the failure to constitute the Assembly by electing a Speaker in the Kosovo government, which has failed for over thirty times. Consequently, five months since the election took place, Kosovo still does not have a new government in place, which shows the lack of culture of compromise and partisan rigidity (KSFGD02, 2025). Moreover, interviewees also mentioned the personalised political power in Kosovo. A representative from the Council of Europe Office said: "It's not parties presenting different political visions, but it is persons." (KS125, 2025) Moreover, while the other non-majority communities traditionally elect the political parties representing their needs, the Serbian community has usually traditionally voted for *Lista Srpska* (LS). The Serb community in Kosovo has 10 guaranteed seats in the parliament. This time around, LS won nine seats out of 10, where for the first time, a candidate from another party was elected as the 10th. This first step towards pluralism for the Serb community is seen as positive by government officials (KS113, 2025).

The media has played an important role in the political environment in Kosovo, particularly during elections. Media ownership by some political parties only helped fuel some polarising narratives, research shows. Moreover, disinformation is seen as a big political threat, particularly in vulnerable communities, such as the Serbs in the north. A high-ranking government official with knowledge on foreign affairs explained that 60 articles were found by Russian-backed Serbian media, which sought to delegitimise any party that is not *Lista Srpska* (KS118, 2025). The effect of disinformation is noted where they spread ethno-nationalist narratives as well, which leads to further internal fragmentation (KSFGD02, 2025).

Finally, as mentioned in the beginning of this subchapter, political parties in Kosovo have mainly been centre-right or centre-left in terms of ideologies. However, in the recent election, there was a party named "Coalition for Family," which ran with conservative ideologies such as: hate speech against the LGBTQI community, opposing abortion rights and tendencies towards more religious narratives. This party received around 20 000 votes (still considered a high number, and there is a fear it may be higher) and did not pass the threshold, which was nevertheless seen as a political threat by some interviewees (KS120, 2025). Research also showed that Kosovo is perceived to be affected by the trend of right-wing parties in Europe.

Despite these political threats, an interviewee said that Kosovo has nonetheless "passed the test of democracy" (KS120, 2025). That is because in the recent election, the results of the political parties from the previous election faced changes (both rise and decline). In the eyes of a Kosovo Serb civil society activist, this is a positive signal because it shows that the Kosovar society pays attention to what policies political parties are delivering and how they are performing (KS117, 2025). Moreover, another example that showcases Kosovo's resilience to political threats is that despite the polarisation between political parties, it never resulted in deep polarisation within the society. The fear exists, however, particularly with the rise of right-wing ideologies, fear of loss of influence from the EU and in particular withdrawal of US presence and funding. Finally, apart from the media, the role of civil society as an actor promoting democracy, transparency, and human rights seems to have an important role too. Interviewees were somewhat split on the role of NGOs, however. Some interviewees viewed civil society such as NGOs as having lost their impact due to perceptions that they are donor driven. Whereas others view civil society as an important watchdog for democracy. Nonetheless, there is a general consensus that despite the obstacles that Kosovo may face, both the civil society and politicians are key to pushing forward Kosovo's democratic future. As an interviewee said, democracy must be maintained and not be taken for granted, but also, it cannot be built overnight (KS120, 2025). In order for this process to continue successfully, maintaining the EU's presence is crucial for both facilitating Kosovo's path to Euro-Atlantic integration, as well as for mitigating the internal and external political threats.

4.6. Policy areas

The recommendations which derived from the discussions were primarily focused on the broader ambition of deepening democracy, conducting reform on the justice system, and strengthening the economy. While these are the overarching themes, interlocutors laid out several policy recommendations, where the actors of carrying out these policies are primarily political actors and the civil society in Kosovo, but most emphasis was targeted towards the EU.

1. **On security threats:**

■ **Recalibrate the EU's Western Balkans Approach on Alignment with EU's Common Foreign and Security Policy**: The EU should strengthen its merit-based approach to enlargement, particularly in terms of alignment with the EU's foreign and security policy, which is crucial in the broader context of the Russian invasion of Ukraine. While accelerated accession is not expected, a consistent and fair framework, backed by political signalling such as advancing the membership of Albania and Montenegro, could restore EU credibility in Kosovo and diminish the space for spoilers who exploit stagnation in the integration process.

■ **Advance NATO Membership Prospects:** In Kosovo there is an extremely high pro-NATO sentiment. Advancing Kosovo's path toward NATO membership would not only enhance its national security and international legitimacy but also act as a critical barrier against malign foreign influence. Thus, A formal roadmap or interim arrangements (e.g., enhanced cooperation programmes) between NATO and Kosovo should be explored. Moreover, greater NATO integration in the Western Balkans - depending also on the trajectories of Bosnia and Herzegovina and Serbia - would help consolidate a security umbrella over Southeast Europe. This would reduce the risk of renewed conflicts, strengthen democratic institutions, and contribute to long-term regional stability, effectively shielding the southern flank of Europe from future geopolitical turbulence.

■ **Strengthen Arms Control and Counter Illicit Financial Flows**: Kosovo needs robust arms control, which experts considered to be an overlooked topic. In addition, there is the need to establish mechanisms and enhanced law enforcement capabilities to combat organised crime networks that threaten security. These groups are often involved in illicit financial flows, including terrorism financing and money laundering, posing risks to national and regional stability.

■ **Enhance Strategic Defence Partnerships:** Strengthening Kosovo's defence capacity through strategic partnerships, such as the emerging military cooperation with Albania and Croatia, is a welcomed development. Such alliances can enhance interoperability and serve as a foundation for long-term regional defence integration.

■ **Fight Disinformation and Invest in Cyber Security**: Combating disinformation campaigns and investing in cyber defence must become strategic priorities. Building institutional resilience to digital threats will protect democratic processes and help counter malign external influence operations, particularly those aimed at undermining public trust given that disinformation exists both at the institutional and at the public level.

2. **On socio-economic threats:**

■ **Lift EU's Sanctions and Address Economic Fallout:** The EU's punitive measures against Kosovo risk deepening socio-economic vulnerabilities. With the withdrawal of specific US funding and delays in Growth Plan allocations, Kosovo faces fiscal uncertainty. A reversal of sanctions, or at minimum targeted relief measures, should be prioritised to prevent economic deterioration.

- **Promote Integration and Social Cohesion**: Institutions must increase efforts to integrate non-majority communities into public life and employment. Inclusive socio-economic policies, particularly those promoting gender equality and employment for marginalised groups, are essential for social cohesion. Support from KFOR and EU mechanisms should continue in this area, particularly at the municipal level.

- **Invest in Human Capital to Advance Innovation**: Kosovo needs to invest in human capital, particularly in research and innovation, which remains underfunded compared to regional standards. The country should also optimize its education system to match labour market needs and address the issue of demographic decline. In the private sector, the biggest issue is the low level of investment in innovation. Most businesses invest in buildings and machinery but neglect research and development. The EU can offer funding to promote innovation, improve competitiveness, and provide affordable financing. It's also important to invest in physical infrastructure to enable better exports. These measures will help private businesses remain resilient and act as drivers of positive change in Kosovo.

- **Undertake Comprehensive Education Reforms:** Education reform must go beyond access and address curriculum modernization, teaching quality, and digital integration. Preparing young people for a competitive labour market is **essential for both economic growth and social stability.**

- **Develop Migration and Integration Policies**: Migration must be seriously addressed - the creation of legal infrastructure for integration of migrants and stopping brain drain. Kosovo is increasingly affected by brain drain, as a significant number of young and educated professionals, especially in sectors such as healthcare, IT, and public administration emigrate in search of better opportunities. This outflow of talent undermines the country's economic growth, weakens essential public services, and threatens long-term development. Despite the financial inflow from remittances, as mentioned in the socio-economic subchapter, the loss of human capital hampers innovation, reduces productivity, and accelerates demographic decline. Addressing brain drain thus requires targeted policies to improve employment conditions, create incentives for skilled workers to stay, and engage the diaspora through return and reintegration programmes.

- **Strengthen Multilingualism and Language Rights**: Kosovo must adopt proactive language policies to promote interethnic communication and shared civic belonging. This includes ensuring multilingual public services and supporting inclusive media content.

3. **On political threats:**

- **Balanced relations between Kosovo and the EU**: Almost all interlocutors emphasised that Kosovo needs to be seen as an equal partner by the EU, particularly on the Dialogue with Serbia, disagreements which led to EU's decision to impose sanctions on Kosovo. The appeasement of Serbia is seen as a big problem because, as interviewees mentioned, the region witnessed much larger breaches by other countries in the past two years, and they haven't faced sanctions like Kosovo. As one interviewee asked, it's unclear what the rules of the game are (KS201, 2025). She further added: "Is it because it benefits a specific political movement to maintain these measures, or is it to weaken

the already weak even more? How much do political leaders in the region need to breach basic rules of negotiation just to avoid sanctions?" Interlocutors emphasised that a terrorist attack such as Banjska is not comparable with the expansion of Kosovo's own state sovereignty. Serbia has received no sanctions, while Kosovo has, which raises moral questions about the rules governing sanctions.

- **Resolve Internal EU Divisions Over Kosovo's Status:** The EU's lack of unanimity on Kosovo's status continues to undermine its mediation capacity and efforts to integrate Kosovo in the EU. Member States that have not recognised Kosovo should reassess their position in light of regional security needs and Kosovo's alignment with EU values.

- **Support Rule of Law and Judicial Reform**: Continued EU support is needed to strengthen Kosovo's justice system, with a focus on judicial efficiency, minority rights, and gender equality. The EU should also fill funding and expertise gaps left by other partners, including USAID.

- **Advance Internal Democratisation of Political Parties**: Kosovo's democratic consolidation depends on reforming its political parties. Current structures are dominated by a few key political figures, which undermines internal accountability and renewal. The EU can provide technical assistance and conditionality for party democratisation and electoral reform.

- **Professionalize Kosovo's Foreign Policy**: Kosovo should invest in building a merit-based, professional diplomatic corps. Strengthening foreign policy capacity is crucial for achieving international recognition, fostering effective economic diplomacy, and engaging in successful multilateral cooperation.

4.7. Conclusion

This paper reveals that although Kosovo has made progress since its independence, it remains exposed to external influence and internal vulnerability, particularly in the areas of security, political stability, and socio-economic development. At the forefront of Kosovo's security concerns is its relationship with Serbia; the unresolved dispute has festered, and continue to, through both hard and hybrid threats, ranging from military provocations and terrorist attacks, such as the one in 2023 in Banjska, to disinformation campaigns targeting Kosovo's legitimacy as a country. Serbia's actions, backed by Russia and occasionally facilitated through regional partners, aim to destabilise Kosovo and delay its Euro-Atlantic integration. While the likelihood of a full-scale war is uncertain, the persistent threat of tension and sabotage is widely recognised.

Russia's influence, while not direct, operates effectively through Serbia's media space and diplomatic channels, focusing on reinforcing narratives that challenge Kosovo's sovereignty, social cohesion and international relations. This asymmetric engagement complicates Kosovo's global positioning and contributes to a broader pattern of destabilisation in the Western Balkans. By contrast, China's presence remains limited and largely derivative of its alignment with Serbia. Türkiye, while generally perceived as a supportive partner, elicits more ambivalent views among the Kosovo public, as it is praised for its cultural and economic engagement, yet occasionally raises concerns regarding ideological influence. In recent years, Türkiye has become a major defence partner for Kosovo, deepening the relationship, such as through the purchase of Bayraktar drones or signing a contract for building a light ammunition factory in Kosovo.

Amid these pressures, Kosovo demonstrates resilience, primarily through its consistent orientation toward the EU and NATO. This Euro-Atlantic alignment serves as both a strategic anchor and a source of domestic legitimacy. However, many interlocutors expressed frustration with the EU's perceived inconsistency, especially in the context of the Kosovo-Serbia Dialogue. The lack of consequences for Serbia's destabilising behaviour, juxtaposed with punitive measures against Kosovo, has eroded trust and reinforced perceptions among Kosovo public of EU double standards.

Internally, Kosovo faces major structural challenges, mainly economic stagnation, and continued emigration which contribute to a weakening demographic base. Limited investment in education, research, and innovation has constrained human capital development, while social inequalities, particularly affecting women and rural populations, further restrict inclusive growth. Though remittances from the diaspora remain an economic lifeline, they risk masking underlying dysfunction in the labour market and public services.

Ethnic division, and in general, the periodically heightened interethnic relations between Kosovo Albanians and Kosovo Serbs continue to obstruct institutional cohesion and policy implementation across the country. The stalled process of establishment of the ASM and the public debate of this mechanism remains a source of political tension, exacerbated by a lack of trust in the public in this idea as a tool of integration.

Politically, Kosovo maintains formal democratic procedures, including competitive elections and institutional pluralism. Yet, the growing polarisation of the political landscape, coupled with weak intra-party democracy and the occasional rise of nationalist and conservative rhetoric, threatens to erode the consolidation of democracy. The media and civil society sectors remain active. However, concerns about politicisation and donor dependence suggest a limited space for independent, sustainable accountability mechanisms.

Kosovo's most pressing threat lies in the convergence of unresolved bilateral relations with Serbia, economic fragility, and declining trust in the credibility of the EU. The fading belief in the EU as a reliable partner, despite Kosovo's alignment with European norms, risks producing widespread disillusionment, particularly among younger generations raised on the premise of integration.

Nevertheless, the regional context offers potential openings. The prospect of Albania and Montenegro advancing toward EU membership by 2030 could create momentum for deeper regional cooperation and reform. For Kosovo, this moment demands a more strategically calculated and assertive foreign policy, one that not only deals with the geopolitical uncertainties shaped by Russia's war in Ukraine, but also actively pushes for engagement.

To conclude, Kosovo's future trajectory will depend on three interrelated factors: the ability to strengthen domestic institutions and social cohesion; the capacity to develop a more inclusive and innovation-driven economy; and the extent to which credible, sustained support from international partners materialises. Without meaningful US and EU engagement and a fair, merit-based enlargement process, the space for democratic backsliding, polarisation, and malign influence will likely expand.

4.8. References

4.8.1. Interview List

Code	Affiliation	Interview place and date
KS113	Professor of International Relations and former diplomat	Prishtina, 25.02.2025
KS114	Member of Parliament	Prishtina, 24.03.2025
KS115	Professor of International Relations	Prishtina, 24.02.2025
KS116	Political advisor to the Government of Kosovo	Prishtina, 25.03.2025
KS117	Kosovo Serb civil society activist	Online, 11.04.2025
KS118	High ranking official in the Government of Kosovo with knowledge on foreign affairs	Prishtina, 28.02.2025
KS119	Former diplomat	Prishtina, 25.03.2025
KS120	Civil society activist with a focus on social justice and domestic affairs	Prishtina, 28.02.2025
KS121	Civil society activist	Prishtina, 21.02.2025
KS122	Former Minister of Foreign Affairs	Prishtina, 25.03.2025
KS123	Member of the Kosovo Police	Prishtina, 24.03.2025
KS124	Civil society activist with knowledge on foreign affairs and security	Prishtina, 24.03.2025
KS125	Representative of the Council of Europe Office in Kosovo	Prishtina, 24.03.2025
KS126	Civil society activist with a focus on security	Prishtina, 24.03.2025
KS127	Civil society activist	Prishtina, 24.02.2025
KS200	Lecturer in economics	Prishtina, 24.03.2025

| KS201 | Civil society activist with a focus on social justice and economics | Prishtina, 25.03.2025 |

4.8.2. Focus Group Discussions

Code	Affiliation	Interview place and date
KSFGD01	Focus group with citizens	Prishtina, 12.03.2025
KSFGD02	Focus group with experts	Prishtina, 24.03.2025

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5. MOLDOVA

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5.1. Introduction

The current report offers an in-depth assessment of how external influence is perceived within the Republic of Moldova, drawing on the perspectives of domestic stakeholders across governance institutions, civil society, the media, academia, and the broader public. Grounded in empirical evidence gathered during fieldwork conducted in February 2025 as part of the REUNIR Work Package 6 (WP6), the analysis looks into how political, economic, and security-related actions by external actors are understood and contested within Moldova's complex national context. The primary objective is to examine the interplay between these external perceptions and Moldova's internal challenges, particularly those related to democratic governance, societal resilience, geopolitical exposure, and sustainable development within the framework of its EU accession process.

Moldova presents a particularly salient case for studying external influence in a region impacted by geopolitical challenges. Since being granted EU candidate status in June 2022, Moldova has made tangible progress in aligning its legal and institutional frameworks with the EU acquis. Following the European Council's decision in December 2023 and a favourable European Commission assessment, Moldova formally launched accession negotiations on 25 June 2024. The bilateral screening process commenced in July 2024 and is progressing as planned and expected to be concluded by autumn 2025. A decision by the EU Council on the chapter-by-chapter opening of negotiations on Fundamentals (Cluster 1) remains pending, given the positive Commission evaluation. In anticipation, the Moldovan authorities have adopted three reform roadmaps focused on democratic institutions, the rule of law, and public administration. Furthermore, a comprehensive National EU Accession Programme for 2025-2029 was adopted by the Government in May 2025.

These institutional efforts reflect a strong political mandate, reinforced most notably by the results of the national EU referendum held in October 2024, in parallel with the presidential elections. In the referendum, 50.4 % of Moldovan citizens voted in favour of enshrining the country's European integration objective into the Constitution, despite an intense disinformation campaign and malign interference from pro-Russian actors. This outcome signalled   not only majority public support for EU membership but also a heightened level of democratic resilience in the face of external pressure. While President Maia Sandu was re-elected for a second term during the same electoral cycle, consolidating the pro-European executive leadership, it was the successful adoption of the constitutional amendment that marked a pivotal moment in anchoring Moldova's European trajectory. Supported by the pro-European parliamentary majority of the Party of Action and Solidarity (PAS), the Government has committed to concluding negotiations by 2028 and ensuring readiness for EU membership by 2030. Moldova's strategic orientation toward the EU remains rooted in both institutional determination and broad-based societal support for reform and modernisation. According to most recent 2025 IRI poll, 63 % of the supported Moldova's EU accession objectives (IRI Moldova, 2025).

Yet, Moldova's accession journey unfolds in an increasingly unstable and fragmented regional environment. Situated on the frontline of Russia's war against Ukraine and in direct proximity to unresolved Transnistrian region conflict, Moldova faces mounting hybrid threats, economic pressures, and internal political vulnerabilities. The national context is further complicated by the upcoming parliamentary elections scheduled for 28 September 2025. These elections will not only serve as a test of democratic resilience but will also determine whether Moldova retains a pro-European parliamentary majority capable of sustaining the pace of accession reforms and make EU integration irreversible. The electoral process is already under intense scrutiny by Moldovan and international actors, due to growing political polarisation, foreign interference, and increased disinformation campaigns targeting the EU, NATO, and Moldova's Western partners.

The present analysis builds upon the 2024 REUNIR WP6 mapping, which identified broader regional dynamics across the Western Balkans and Eastern Partnership countries. The February 2025 field research reinforces the broader REUNIR hypothesis: that external actors can function as both enablers of transformative progress and paradoxically as contributors to political stagnation and institutional destabilisation. The report aims to contribute to a more grounded and context-sensitive understanding of Moldova's evolving relationship with external actors and institutions. By placing local voices and perceptions at the centre of analysis, it underscores the importance of coherent, inclusive, and sustained external engagement that responds to Moldova's unique vulnerabilities and aspirations. In doing so, it seeks to inform both national stakeholders and international partners about the strategic opportunities and limits of foreign support in strengthening Moldova's democratic resilience, social cohesion, and European future.

The analytical body of this report is structured around two main sections. Following this introduction and the methodology, the first section examines the broader contextual landscape and stakeholder perceptions of external actors across three thematic areas: (1) the spectrum of military threats and opportunities for resilience; (2) socio-economic vulnerabilities and national adaptation strategies; and (3) political risks, including democratic backsliding and institutional fragility. The second section offers an analysis of strategic policy areas where external support can be mostly directed, particularly from the EU and other international partners. Each section builds upon the initial mapping exercise and is enriched with qualitative insights from expert interviews and focus groups, complemented where appropriate by illustrative data that reflect how Moldova's reform dynamics are perceived and experienced by local actors from diverse perspectives.

5.1.1. Methodology

This report is based on qualitative fieldwork conducted in February 2025 in the Republic of Moldova, under the REUNIR project. The central aim of the research was to assess local perceptions of external actors, as well as the perceived political, socio-economic, and military threats and resilience factors affecting the country. The methodology employed a triangulated qualitative design combining expert and non-expert perspectives through 30 semi-structured expert interviews and two focus group discussions.

To inform the findings in the report during December 2024 - February 2025 a total of 31 expert interviews were carried out with participants selected for their thematic and institutional expertise in areas such as governance, foreign affairs, security, economy, civil society, academia, and media. 30 interviews were conducted during the field work visit to the Republic of Moldova in February 2025. One interview (MDA01)

was conducted prior to the visit, in December 2024. Interlocutors included public officials, including members of parliament, government officials at the level of state secretaries, civil society experts and representatives of business associations. The interviews followed the standardised REUNIR WP6 interview guide and were designed to explore in-   depth perceptions related to internal political dynamics, democratic backsliding, foreign influence, institutional resilience, and societal fragmentation. The interviews were conducted in person, with several held online due to scheduling or logistical constraints. Each interview lasted between 45 and 60 minutes, being audio recorded with the participant's consent, and was subsequently transcribed for thematic analysis using a grounded approach. In line with REUNIR ethical rules, informed consent was obtained from all participants. Where explicit consent for attribution was granted, quotations are cited with names. Otherwise, references are anonymised or described by institutional affiliation or role. A table of interviewees' profiles   is enclosed in this   report (Annex 1). A summary of the institutional affiliations and thematic domains of expert interview participants:

Country	Interlocutors	Number
Republic of Moldova	Civil Society	8
Republic of Moldova	Government officials	14
Republic of Moldova	Businesses associations	2
Republic of Moldova	Members of Parliament	4
Republic of Moldova	Other (specify)	3 (2 international foundations/centres, 1 independent/civil society energy expert)
Women		14
Men		17

To complement expert insights and ensure broader societal representation, two focus group discussions were conducted with a total of 21 participants. These sessions aimed to capture both the expert and grassroots perspectives on resilience, threats, and external influence in Moldova. The focus group   discussions revolved around three interlinked dimensions: a) Moldova's current vulnerabilities, b) the actors shaping domestic resilience, and c) projections of future threats and opportunities through 2035. Participants identified a complex and interdependent set of military, socio-economic, and political threats, with Russian aggression, energy insecurity, economic fragility, and institutional corruption ranking as the most pressing. During the sessions, civil society, media and international partners, particularly the EU, were mentioned as essential drivers of democratisation, economic development and political stability. The **first focus group** (FGD1) included participants from a broad spectrum of institutions, such as civil society organisations, media, business associations and public institutions. The group was composed of six women and six men, reflecting balanced gender representation. Institutional diversity provided a rich foundation for multi-angled perspectives on disinformation, institutional trust, and democratic engagement. The second focus group

(FGD2) featured a diverse range of participants with professional backgrounds in academia, civil society, business, and communication. The group included a PhD holder in political science and associate professor, experts in strategic communication, project coordination, and youth engagement. Several participants had educational backgrounds in international relations and law, including students and alumni of the State University of Moldova (USM). Educational levels ranged from post-secondary to doctoral.

The table below summarises the profile of focus group participants:

Country	Interlocutors	Number
Republic of Moldova	Academia	1
Republic of Moldova	Civil Society	10
Republic of Moldova	State Institutions	1
Republic of Moldova	Private Businesses / Chambers of Commerce	4
Republic of Moldova	Political Parties	0
Republic of Moldova	Other (specify)	5 (1 media representative, 1 librarian, 1 expert in strategic communication, 2 students)
Women		10
Men		11

All research activities were conducted in strict accordance with REUNIR's ethical guidelines. Participants were informed about the voluntary nature of their involvement and their right to anonymity. This methodology ensured multi-stakeholder representation across professional sectors (civil society, media, business, academia, public service) and societal levels (experts and citizens). By combining in-depth interviews with focus group discussions, the study captured both vertical (institutional) and horizontal (civic) perceptions of external influence, institutional dysfunction, and sources of democratic resilience. The diversity of respondents and the open-ended format of data collection allowed for the emergence of unexpected themes and nuanced insights into Moldova's internal and external political dynamics.

5.1.2. Context

Since 2022, the Republic of Moldova has made notable progress in its Europeanisation trajectory. Anchored in a whole-of-society approach, the country has intensified legislative alignment with the EU acquis and initiated broad-based institutional reforms in governance, justice, and public administration. The European Council's decision in December 2023 to open accession negotiations served as a critical political and strategic milestone, accelerating Moldova's transformation agenda.

To operationalise the accession process, Moldova adopted a suite of guiding frameworks, including the National Action Plan for EU Accession (2024–2027) and the European Moldova 2030 National Development Strategy. In May 2025, the Government adopted a new National EU Accession Programme (PNA) for 2025–2029. This master national EU accession policy planning document outlines the transposition of over 3 000 EU legal acts into national legislation, through 1 791 legislative measures and 1 088 implementation actions required to align with all 33 chapters of the acquis. As one civil servant reflected, "the PNA is not just a roadmap, it's a governance test. It shows how serious we are about delivering Europe here" (MDA02).

Complementing these efforts, Moldova launched the Reform Agenda 2025-2027, a strategic blueprint targeting seven pillars: economic competitiveness, infrastructure, energy, governance, social capital, digital transition, and fundamental values. This agenda outlines the key policy measures and priorities for the implementation of the EUR 1.9 billion Moldova Growth Plan, signed in Chisinau on 9 May 2025. The plan includes EUR 400 million in grants and EUR 1.5 billion in concessional loans. It ties financial support to performance-based reforms as per the Reform Agenda. It aims to strengthen Moldova's resilience, level up the convergence with the EU and accelerate integration into the Single Market. "For the first time, reforms are backed by money that's visible to communities—clinics, roads, solar panels. That changes everything," said MDA28.

By March 2025, Moldova had completed bilateral screening for three negotiation clusters: Fundamentals (Cluster 1), Internal Market (Cluster 2), and External Relations (Cluster 6). According to the timeline agreed with the European Commission, the screening of Clusters 3, 4, and 5 is expected to conclude by September 2025. Formal negotiations on the Fundamentals Cluster are anticipated to begin in 2025, with Chapter 23 (Judiciary and Fundamental Rights) envisaged to remain open throughout the process to ensure sustained conditionality in justice and anti-corruption reforms. As noted across interviews and focus groups, the quality and credibility of implementation, rather than legislative output alone, will be decisive.

The October 2024 constitutional referendum enshrined EU accession as a strategic constitutional objective. Although the referendum passed with only 50.4 % support, the outcome was symbolically significant. However, low voter turnout, particularly among rural and economically vulnerable groups, revealed both societal fatigue and the effectiveness of disinformation campaigns targeting Moldova's European trajectory. According to MDA17, "disinformation is not just about misinformation—it's about foreign information interference that exploits vulnerabilities and targets Moldova's strategic trajectory". A similar concern was raised in focus groups, where participants emphasised that Russian-language media often portray EU integration as externally imposed rather than societally driven.

Compounding these challenges, the referendum result was reportedly affected by a large-scale vote-buying scheme involving over 130 000 voters, allegedly coordinated by Kremlin-linked political proxies. While overall voter turnout remained high, the discrepancy between pre-referendum polling and the narrow outcome was widely attributed to electoral manipulation by Russian proxies rather than shifts in public opinion.

Indeed, public support for EU integration has remained relatively stable. The March 2025 iData Barometer showed 58.6 % support for EU accession, in line with pre-referendum levels. Another survey analysed by IPRE in April 2025 reported 61 % support (37 % "support" and 24 % "strongly support"), while only 27 % opposed. "The link between poverty and propaganda is real," noted MDA24. "If we fail to address people's material

needs, we lose the narrative war." MDA05 added, "EU reforms must speak through results, not PowerPoint slides. People believe in roads, not rhetoric."

Considering recent polls and election results, youth and diaspora communities remain the strongest proponents of European integration, associating the EU with opportunity, transparency, and the rule of law. For instance, in the 2024 EU referendum, nearly 77 % of Moldovans abroad voted in favour of enshrining the objective of EU accession in the Constitution. Yet disinformation continues to shape perceptions in underdeveloped regions, where institutional trust is low. As MDA10 observed, "people want European values, not slogans. Standards need to be internalised and seen in daily life, not just written in laws". Echoing this, MDA31 stressed the importance of tailored communication: "Strategic communication must be humanised, mayors, teachers, and local leaders should be the ones making the case for Europe, not just institutions."

The ongoing Russia's war in Ukraine remains the dominant external factor shaping Moldova's security and political environment. Russian drone incidents, cyberattacks, and media interference have targeted Moldova's institutions and democratic processes. Interviewees and participants described the Kremlin's information campaigns as embedded rather than external. "Russian narratives are not imported—they're embedded. They reflect frustrations that people feel about corruption, poverty, and weak institutions," explained MDA09. As one focus group participant put it, "external propaganda hits hardest when people feel abandoned at home".

Economically, Moldova continues to deepen its integration with the EU. In 2024, the EU accounted for 66 % of Moldova's exports and over 55 % of total trade (European Commission, 2025). In contrast, trade with Russia declined sharply, falling to just 3 % in 2024 down from nearly 9 % in 2021 (National Bureau of Statistics, 2025). Moldova joined the Single Euro Payments Area (SEPA) in March 2025 (NBM, 2025) and signed a free trade agreement with EFTA in April 2025 (EFTA, 2025). Roaming tariffs with the EU were also substantially reduced (EU4DIGITAL, 2025), improving mobility and connectivity for Moldovan citizens.

Despite the regional instability generated by Russia's war in Ukraine, Moldova achieved improved sovereign credit ratings in early 2025, including a B3 rating from Moody's and a B+ rating from Fitch. These upgrades signal increasing investor confidence and reflect Moldova's political stability and reform momentum. However, the macroeconomic outlook remains fragile. The country continues to struggle with persistent inflation, trade volatility, and elevated energy costs—challenges that disproportionately affect low-income households, pensioners, and small and medium-sized enterprises. As MDA01 noted, "every crisis hits the poor twice—once through prices, and once through fear".

Focus group participants and interviewees repeatedly underlined the intersection between economic insecurity and vulnerability to foreign narratives. "The link between poverty and propaganda is real," said MDA24. Anti-EU and pro-Russian narratives often exploit local frustrations with inequality, rising costs, and slow reform delivery. In some communities, economic grievances are converted into political cynicism, undermining trust in pro-European policies. One focus group participant remarked: "People hear about billions from the EU, but they still pay EUR 150 for heating. That's where disinformation finds its audience."

Interviewees stressed that economic resilience hinges not just on trade or macroeconomic indicators, but on inclusive development. MDA11 emphasised: "Unless EU integration is felt in small towns and poor villages,

it will remain an expert project." Participants called for targeted investment in rural infrastructure, public services, and local entrepreneurship. "Europe must be visible in daily life—not just in strategies," concluded a regional administrator from the expert focus group.

Geopolitically, the EU, the United States, 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. To be noted that the IRI poll from May 2025 (IRI, 2025), shows the EU and Romania are seen as the most critical partners, with over 78 % of respondents identifying each as the most important political and economic 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. As one focus group participant noted: "Romania is more than a neighbour—it is our mirror into Europe."

At the same time, on perceptions of Russia (54 %) and Ukraine (62 %), the same IRI poll suggest that Ukraine is viewed more positively largely due to closer ties among communities, considering also as a security partner and buffer against Russian aggression. But the war also generates anxiety. "People admire Ukraine's resistance, but they also fear its chaos spilling over. Moldova can't afford a war zone next door," said interlocutor MDA11. By contrast, Russia continues to be seen as both a legacy power and a primary hybrid threat. MDA30 emphasised: "Russia doesn't need tanks, it has Telegram, the church. The battlefield is cognitive, not just territorial."

Despite the longstanding development and political support from the United States, previously comparable in scope to that of the European Union, the general suspension of USAID assistance in early 2025 by the new administration has impacted the visibility and influence of US engagement. However, Moldovans still identify the US as a strategic partner (about 4 2 %) and Moldovan authorities seek to continue a long-standing partnership with the US securing bi-partisan support in the US Congress (TEPSA, 2025). This may reflect a perception gap, in which U.S. support, while impactful, is less visible at the grassroots level. "People know when a road is EU-funded," said MDA05, "but they don't see the USAID logo and connect it to democracy or local governance." Türkiye, 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, while generally supporting it. Türkiye's involvement in Gagauzia region is also notable, as it counterbalances Russia's influence through aid, investments, and close ties with regional leaders. Türkiye'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. As MDA26 noted, "Türkiye has been the balancing actor in Gagauzia. It provides stability—not pressure."

Meanwhile, China, though economically present in infrastructure and telecom projects, was rated as important by just 35 % of respondents, indicating limited perceived political relevance. Several focus group participants viewed China as "present but distant," economically useful but not strategically influential.

These perceptions reflect a growing public awareness of Moldova's geopolitical entanglements and the broader competition between democratic and authoritarian models. "People feel Moldova is always in someone's shadow," said one expert focus group participant. "The question is whether we choose the one that offers dignity or control." Citizens tend to view the EU–US partnership as reinforcing Moldova's sovereignty and democratic consolidation, while the EU–Russia dynamic is seen as conflictual and zero-sum.

MDA09 explained: "Russia wants to drag us backwards. Europe demands we walk forward. The tension is not ideological—it's existential." Still, many respondents express a desire to avoid great-power confrontation. Focus group discussions revealed strong support for a foreign policy that preserves strategic clarity without provoking societal polarisation. As one participant from the general public focus group put it: "We want to be European, but not a battlefield." Interviewee MDA16 added: "Moldova's diplomacy must be smart, firm on integration, but careful not to ignite internal fractures."

Moldova's European future is underpinned by a reform agenda of unprecedented scope and by robust support from strategic partners. However, the credibility and sustainability of this path will depend on the state's capacity to deliver tangible progress, protect civic space, and maintain institutional integrity. The upcoming 2025 parliamentary elections are widely seen as a turning point. As one participant from a rural focus group concluded: "Resilience will not come from declarations, it will come from whether people feel things getting better."

5.2. Military threats, opportunities and resilience

The security perceptions have been defined by the regional volatility triggered by Russia's war against Ukraine, layered over historical vulnerabilities and modest national defence capacities. Across both expert and general public focus groups, there was strong convergence in identifying Russia as the primary external threat. This perception is driven by Russia's ongoing illegal military presence in Transnistria, destabilising cyber operations, and continuous disinformation campaigns targeting Moldova's political institutions and societal cohesion.

The unresolved status of the Transnistrian conflict and the presence of Russian troops from the former 14th Army were repeatedly cited as direct threats to sovereignty and constitutional order. "The non-resolution of Transnistria is more than a frozen conflict, it is a vector for continuous interference and institutional subversion," one participant from the expert focus group noted. The general public group echoed this concern, with one participant stating: "We talk about neutrality, but Russian soldiers are still here. That's not neutrality, that's occupation." In parallel, Gagauzia was frequently mentioned as a growing source of internal vulnerability. While formally integrated into Moldova's constitutional order, several participants perceived the region as increasingly politicised and leveraged by external actors. "Gagauzia exerts more political leverage in Chişinău than Transnistria, through votes, media, and soft disruption," remarked a civil society representative.

Participants from both focus groups previously expressed concern that Moldova's historic energy dependency on Russian sources exposed the country to manipulation, fostering social discontent and weakening political stability. However, in the past three years, Moldovan authorities, supported by the EU and other international partners, have significantly reversed this vulnerability. By 2023, Moldova (excluding the Transnistrian region) had fully ceased reliance on Gazprom-supplied natural gas. This process culminated on 1 January 2025, when Moldova stopped purchasing electricity from the Cuciurgan power plant in Transnistria, operated by Russia-controlled RAO EAS. The subsequent cessation of Gazprom gas deliveries to the left bank of the Nistru further consolidated Moldova's energy sovereignty. As MDA23 noted, "Energy

blackmail used to be Russia's most effective peacetime weapon—it was invisible, but everyone felt it. Today, that weapon has lost its grip on Moldova."

Moldova's constitutional neutrality was a point of contention across focus groups and interviews. While some experts argued it remains a pragmatic safeguard against entanglement in regional conflicts, others considered it outdated and strategically limiting. Interviewee MDA20 observed: "Neutrality gives us a buffer, but it also deprives us of credible deterrence." Among the general public, views were mixed. Neutrality was often associated more with fragility than with security. "It means we stay weak, hoping nobody notices us," commented one participant. Nonetheless, trust in the National Army remained comparatively high, seen as a stabilising institution amid broader public distrust in governance.

Moldova's foreign and security policy has also undergone significant transformation and increasing alignment with the EU. Chapter 31 is best marked in terms of convergence and progress (European Commission, 2024). The 2023 National Security Strategy was identified by both expert and institutional stakeholders as a turning point in Moldova's security doctrine. The strategy explicitly designated Russia as the primary threat actor, as also emphasised by the interlocutor MDA30 "This is the first time Moldova has explicitly identified its real threats—Russia, hybrid warfare, and corruption—in its official strategies."

Institutional responses to foreign information manipulation and interference (FIMI) have been reinforced. The Centre for Strategic Communication and Countering Disinformation, established in 2023, plays a central role in coordinating government action, aligned with the EU's FIMI Toolbox and the forthcoming Democracy Shield initiative. One focus group participant described the Centre as "the brain behind our defence, it fights lies with facts." Cybersecurity reforms have also progressed, driven by EU technical assistance. Moldova has started transposing the Cybersecurity Act, Cyber Resilience Act, and NIS2 Directive, alongside the creation of the Cybercor Innovation Institute, which aims to foster national expertise. Interviewee MDA12 highlighted the urgency of parallel efforts in public education: "Cyber resilience starts in schools and town halls, not just in government servers."

Moldova's alignment with the EU's Common Foreign and Security Policy (CFSP) reached 90 % by September 2024, up from 80 % in 2023 (European Commission, 2024). The most notable advancement remains conclusion of the EU–Moldova Security and Defence Partnership in May 2024 (EEAS, 2025), the first such agreement between the EU and a candidate country. The agreement facilitates operational cooperation on early warning, hybrid threat response, and institutional capacity building. These efforts are reinforced by Moldova's participation in the EU Partnership Mission (EUPM) and the work of a Security Hub established in Chișinău with European Commission support. Moldova also increased its contributions to EU CSDP missions, including deployments to EUTM Somalia and EUFOR ALTHEA. As of early 2025, a light infantry platoon and several staff officers had been seconded, with plans to scale up participation to 30 personnel by 2026. These engagements support Moldova's goal of meeting NATO compatibility standards by 2030 and contributing to the EU Rapid Deployment Capacity. As MDA09 remarked, "It's not just symbolic anymore. We are stepping into real European defence cooperation, even if modestly."

Moreover, Moldova has applied to participate in select Permanent Structured Cooperation (PESCO) projects, specifically those targeting rapid cyber response capabilities and countering unmanned aerial systems. Cross-border cooperation with EU Member States has also expanded through joint training, security simulations,

and staff exchanges, with a focus on building resilience among national security professionals, civil servants, and strategic communication officers.

Across focus groups and interviews, a recurring theme emerged: Moldova's national resilience depends not solely on military capabilities but also on societal cohesion, credible communication, and institutional trust. As one security expert stated, "Security is psychological as much as it is institutional. The public needs to believe that the state can protect its sovereignty and its people." This was echoed in the general focus group, where a participant noted, "We are not afraid of war, we are afraid of being alone when it comes." The dominant sentiment is that Moldova's security future is inseparable from its EU integration path. While external threats persist, resilience is understood as residing at the intersection of capable institutions, informed and united citizens, and strategic international alliances. The primary challenge moving forward will be to maintain internal coherence, sustain public confidence, and translate legislative alignment into visible and lived security.

5.3. Socio-economic threats, opportunities and resilience

Moldova's socio-economic trajectory was marked by overlapping vulnerabilities and reform-driven opportunities, deeply shaped by the EU accession process and the ongoing war in Ukraine. Both expert and general public focus groups expressed a shared understanding that economic fragility remains one of the most exploitable channels for foreign influence, particularly from Russia. However, many participants also stressed that the current framework of EU-supported reforms presents a historic opportunity to build resilience from the ground up.

5.3.1. Structural vulnerabilities: migration and disparities

Demographic decline, labour emigration, and territorial inequality were consistently cited as existential risks. Moldova's rural and small-town populations continue to age rapidly, while public services are affected especially in education, healthcare, and transport. "We are becoming a country of pensioners, and it's not just a metaphor, it's demographic collapse," warned MDA16. Young people, particularly from peripheral regions, are seeking educational and economic opportunities abroad, leaving behind hollowed-out communities. As MDA25 mentioned, "We are exporting hope and importing nostalgia." Focus group participants echoed this concern, with one noting: "There are villages where the only people left are the priest and the mayor." Another participant added, "When the school closes, the village dies, it's not just symbolic, it's the beginning of the end." The consensus was clear: without targeted policies to regenerate rural areas and reintegrate the diaspora, Moldova risks irreversible demographic erosion and growing regional disparities. "You can't ask people to believe in Europe when their school has no heating," remarked a teacher from the general-public focus group. These conditions create fertile ground for disinformation and anti-European narratives, which often promise security, stability, and a return to a perceived past normality. MDA24 noted: "Propaganda thrives in places where the state has disappeared."

Moldova remains heavily reliant on remittances, over 11 % of GDP in 2024, and vulnerable to external shocks (National Bureau of Statistics, 2025). Several interviewees highlighted the lack of industrial diversification and the disruption of traditional eastern trade routes as key bottlenecks to growth. "We don't produce enough,

and what we do produce doesn't reach enough markets," said MDA02. Also, MDA05 warned that this fragility leaves Moldova susceptible to politicised economic pressure: "We're too small to fail, but too fragile to resist manipulation."

5.3.2. Energy resilience

The war in Ukraine has intensified   challenges related to energy. Energy price volatility and supply chain disruptions continue to affect food, transport, and utility costs. Though Moldova successfully ended its dependence on Russian energy, the adjustment came with short-term socio-economic consequences. Focus group participants noted that these real hardships have been weaponised in disinformation narratives. As MDA08 explained: "Disinformation works because it rides on real pain, especially when bills go up." Another participant added: "People don't see geopolitics, they see their electricity bill."

To mitigate these vulnerabilities, Moldova has accelerated efforts to diversify its energy sources and integrate into the EU grid. This structural shift has been accompanied by increased costs but is broadly   viewed as a strategic investment in national resilience. Moldova together with Ukraine joined the ENTSO-E network. Moldova now buys gas on international markets, has integrated over 35 % renewables into its energy mix in first half of 2025, and is advancing power interconnections with the EU. These investments, though not yet felt evenly across all regions, are beginning to produce visible results. "We're paying more, yes, but we're paying for independence, not influence," said MDA26, a representative from the energy sector. Another interlocutor (MDA11) said: "When people see new solar panels or EU-funded repairs at their local school, Europe becomes real." MDA11, a senior official, described the transition as "the backbone of our sovereignty, it gives us breathing room in policy, not just in winter".

These efforts were backed by sustained EU support, including the most recent EUR 310 million emergency energy assistance package, which   supports Moldova to cover increased energy builds by the end of 2025 (European Commission, 2025). Also, as part of the package, EUR 60 million are earmarked to help mitigate the gas crisis in the Transnistrian region, helping ensure continued heat and electricity supply to civilians, while indirectly increasing Chisinau's leverage in future reintegration efforts. "The EU helped us keep the lights on, literally and politically," remarked MDA29, an independent regulatory official.

Interviewee MDA01, from civil society, also highlighted the strategic dimension of the energy shift: "This is not just about gas, it's about trust. When people see the government managing a crisis without Moscow, it changes their perception of what sovereignty means." Similarly, MDA10 observed that these visible reforms help inoculate against disinformation: "When bills are paid and homes are warm without Russian gas, propaganda loses its bite." Overall, Moldova's detachment from Russian energy is now understood not only as a success, but as a fundamental reconfiguration of its national security architecture. As one expert focus group participant concluded: "Energy resilience is no longer a sectoral issue, it's a geopolitical shield."

5.3.3. Moldova Growth Plan as Catalyst

In addition, participants expressed optimism regarding the impact of the EUR 1.9 billion Moldova's Growth Plan and the respective Reform Agenda. Conditionality-linked disbursements were widely seen as a mechanism to ensure discipline and policy coherence. As one mayor participating in the expert focus group

put it: "For the first time, reforms come with a scoreboard and a budget line." MDA01 noted: "The EU is no longer just an aspiration, it's a driver of school buses, hospitals, and small business grants."

Participants across interviews and focus groups identified infrastructure, agriculture, SME development, and education as critical sectors where EU funding is beginning to make a tangible difference. MDA26 highlighted how rural development programmes are stabilising local communities: "When a village gets a new road or kindergarten, migration slows down." Similarly, a focus group participant remarked: "People don't believe in promises—but they believe in new clinics."

The sentiment across both groups was clear: socio-economic resilience in Moldova cannot be achieved solely through declarations or frameworks. It must be earned through visible, inclusive, and sustained progress. As MDA31 concluded: "Resilience starts when people stop asking who will fix things and start believing they can fix things here."

Overall, participants of the focus groups viewed Moldova's socio-economic resilience as contingent on translating reforms into visible and inclusive outcomes. While vulnerabilities persist, the combination of EU financial instruments, local commitment, and civic engagement was seen as a key opportunity. As one participant concluded in the first focus group: "Resilience will not come from declarations, it will come from whether people feel things getting better."

5.4.   Political threats, opportunities and resilience

Moldova's political landscape remains relatively stable on the surface due to the re-election in November 2024 of President Maia Sandu and the continued parliamentary dominance of the Party of Action and Solidarity (PAS). This institutional continuity provided a strong platform for accelerating the country's Europeanisation agenda. However, the narrow margin of victory in the October 2024 constitutional referendum   exposed deeper societal divisions and highlighted the growing impact of Russian hybrid interference, particularly in the run-up to the 2025 parliamentary elections.

Despite this formal stability, underlying political tensions have continued. While PAS retains a legislative majority, it is increasingly challenged by a resurgent and fragmented opposition, and by mounting public fatigue with the pace and delivery of reforms. The 2023 Constitutional Court ban on the Șor Party removed a major disruptive actor, but its networks quickly re-emerged under new political labels, particularly in Gagauzia, fuelled by illicit financing, populist rhetoric, and coordinated disinformation campaigns. As MDA11 noted: "These political brands may change names, but the manipulation tactics and financing networks remain the same." According to a recent poll from May 2025, if parliamentary elections were held, 27.5 % of Moldovan citizens would vote for PAS, 12.2 % for the "Victory" Bloc (proxy of Shor group), 11.6 % for the Party of Socialists (PSRM), 6.5 % for the "Alternative" Bloc, and 3.8 % for Our Party. Other parties, including the Party of Communists, the pro-European opposition bloc "Together", former spins of Democratic Party of Moldova - the European Social Democratic Party and the Respect Moldova Movement, remain under   the electoral threshold (5 % for parties, and 7 % for blocs). These results suggest a fragmented parliament, with an uncertain pro-European majority.

In this context, the 2025 parliamentary elections are widely viewed as a referendum on Moldova's future direction. Civil society voices and focus group participants described the stakes in existential terms. One civil society representative stated: "This is not just another election, it's a choice between two futures: democratic resilience or regression." The next Parliament of Moldova will play a critical role in preparing the country for EU accession by adopting the necessary legislative reforms, overseeing implementation, and sustaining the political momentum toward the 2030 membership objective. It is therefore essential that clearly pro-European and reform-oriented political forces secure a majority. Yet as the polling shows, several opposition pro-European parties remain below the threshold to enter Parliament, underscoring the urgent need for strategic coordination, voter mobilisation, including in the diaspora, and credible political platforms.

Against this backdrop, civil society in Moldova is emerging as a key actor in promoting reforms, fostering societal cohesion, and supporting the EU integration process. Over the past two years, civil society organisations and independent media have played a dual role—as strategic partners to pro-reform experts in shaping and implementing reforms, and as independent watchdogs holding institutions accountable. Their role was instrumental in awareness-raising activities during the 2024 EU referendum. Focus group participants from both expert and general public groups acknowledged the visibility and impact of civil society initiatives in areas such as justice reform, anti-corruption, public administration, and strategic communication. Interlocutor MDA08 highlighted this dual role: "Civic watchdogs are the spine of reform. If you bend them, the whole process collapses." Similarly, MDA16 argued for sustained partnerships grounded in trust and accountability: "Strategic silence in the face of attacks on civil society is read as complicity. Our partners must stand firm."

Nonetheless, Moldova's civic space remains under pressure. Russia-sponsored smear campaigns, conducted through domestic proxies, have intensified. The March 2025 draft "foreign agents" law, introduced by the Bloc of Communists and Socialists (BCS), exemplified this trend. Although unlikely to be adopted due to a lack of parliamentary support, the initiative triggered widespread condemnation from civil society (Moldova NP EaPCSF, 2025), the EU Delegation in Chişinău, and independent media. As MDA22 warned, "Even the proposal of such a law affects civic space. It signals that dissent can be punished." MDA16 added, "The real danger is not the law itself—it's the message it sends: that dissent is unpatriotic."

Disinformation remains a powerful tool for undermining societal cohesion. Focus group participants and interviewees described how Kremlin-linked narratives often exploit real grievances, rising costs, depopulation, and unequal development, to frame EU integration as a loss of sovereignty or cultural identity. Interviewee MDA17 observed: "What makes Moldova vulnerable isn't just the message, it's the void the message fills. Russia exploits that void to divide and dominate." MDA30 added, "Hybrid threats aren't just cyber or military. They're psychological. And the hardest part is—we can't fight lies with lies. We have to play by democratic rules."

According to the 2024 Public Opinion Barometer, only 3.1 % of Moldovans rely on expert sources, while 36 % depend on social media platforms for news. MDA22 remarked that, "We're not just fighting lies—we're fighting a campaign to make truth irrelevant." Civil society actors and communications experts stressed the importance of localised and empathetic strategic messaging that connects reforms with everyday realities. A participant in the second focus group urged: "Don't talk about acquis chapters, talk about roofs fixed and

teachers hired." Trusted messengers, such as mayors, educators, and diaspora leaders, were seen as crucial to counteracting disinformation and restoring public trust. The media ecosystem is further compromised by low media literacy and insufficient institutional response (CIJ, 2025).

Concerns over electoral integrity were widely shared. Vote buying, opaque campaign financing, and administrative pressure were cited as recurring tactics, particularly in Gagauzia, the Transnistria region, and diaspora-sensitive constituencies. MDA27 stated: "You can't call it democracy if votes are bought with envelopes and heating subsidies." The Central Electoral Commission confirmed attempts to manipulate the votes of over 130,000 people during the 2024 referendum, largely attributed to Kremlin-linked proxies (SIS, 2025). MDA29 remarked: "We underestimated how digital and cash-based manipulation go hand in hand." Focus group participants highlighted the growing influence of the Moldovan Orthodox Church subordinated to the Moscow Patriarchate in spreading anti-European narratives. A 2024 Free Europe investigation revealed that nearly 500 priests and parishioners had been sponsored to travel to Moscow ahead of the referendum (RFE/RL Moldova, 2025). As MDA07 commented: "These trips aren't spiritual—they're strategic. It's about soft power in cassocks."

Justice reform continued to provoke political tension and public scepticism. While the EU commended Moldova's formal progress, interviewees pointed to inconsistent implementation. MDA09 stated: "The problem is not laws, it's courage to apply them without double standards." Delays in the vetting process largely due to internal resistance and the controversial proposal to dismantle the Anticorruption Prosecutor's Office (APO) and Prosecutor's Office for Combating Organised Crime and Special Cases (PCCOCS) raised fears of institutional rollback and politicisation. The Venice Commission's involvement was broadly welcomed, but interviewees stressed the need for consistent domestic ownership.

Despite these risks, Moldova's political resilience is supported by EU conditionality, external donor assistance, and increased civic engagement. Local Public Authorities (LPAs) consistently called for greater fiscal and administrative decentralisation to bring reforms closer to the citizen. As MDA22 put it: "If reforms stay in Chișinău, so will legitimacy."

Youth within the country were also seen as central to Moldova's resilience strategy. Opportunities created through Erasmus+, digital innovation, and green entrepreneurship were cited as paths to retention and optimism. "We need to offer more than slogans, we need to offer young people a future here," said one youth NGO leader. Interviewee MDA10 added: "Young people want purpose. They need to see that reforms bring real opportunities, not just reforms for the sake of compliance."

The role of the diaspora was identified in both focus groups as both a vulnerability and an opportunity. While remittances are crucial, participants urged policymakers to recognise the diaspora as a political and civic force. The mobilisation of young diaspora voters in past elections was cited as a model of democratic engagement. Interviewee MDA17 added: "The diaspora isn't just sending money—they're sending back democratic expectations. We need to listen to them politically, not just economically." Civic tech initiatives and diaspora voter mobilisation provide encouraging signs, though concerns persist about rising political apathy among young Moldovans frustrated by institutional inertia.

5.5. Policy areas

Across the expert stakeholder focus group conducted in Chișinău in February 2025, participants offered a detailed and urgent mapping of Moldova's structural gaps and strategic priorities. While most acknowledged institutional progress since Moldova received EU candidate status in 2022, concerns persist that core reforms remain performative or slow in implementation. As MDA03 noted: "We are very good at drafting roadmaps, but far less effective at reaching the destination." The EU is widely viewed not only as a normative model but also as the primary external actor with the credibility and leverage to catalyse systemic transformation. Several participants cautioned, however, that technical assistance focused solely on institutional compliance may reinforce fragility if not coupled with broader societal engagement. As MDA03 put it: "EU integration can't be a checkbox exercise. We need transformational change, and that means real consequences for stagnation." This sentiment was echoed by general focus group participants, who underscored the disconnect between political ambition and policy delivery. MDA12 warned: "Without reforms that people can feel, the whole EU project risks becoming another unkept promise." Some experts also warned that while institutional reforms are necessary, they will remain incomplete unless they are accompanied by cultural and behavioural shifts within both public administration and the political class.

Justice and the rule of law ranked highest among all concerns. While Moldova's extraordinary justice reform efforts since 2022, particularly vetting of judges and prosecutors, were acknowledged, participants cited persistent delays, internal resistance, and selective enforcement as major challenges. "Until powerful people go to jail, nothing changes," asserted MDA16. Interviewees criticised the politicisation of anti-corruption discourse. "It's easier to speak about justice reform than to face its consequences," said MDA12. Still, others stressed the complexity and fragility of the process. As MDA20 noted: "You can't undo decades of captured institutions in two years." Some recognised positive developments in the reconstitution of judicial self-governing bodies, such as the Superior Council of Magistracy and Superior Council of Prosecutors, and called for continued EU conditionality linked to prosecutorial independence and institutional accountability. "What we need from the EU is not just pressure for new laws, but support for implementation, down to the courtroom level," stressed MDA17. MDA09 added: "The EU has leverage. It should use it wisely, reward courage, not just compliance." Consequently, participants across both groups stressed the need for EU support to focus on effective enforcement and structural accountability, not just legislative alignment. The accession process negotiations, and the EU conditionality should be tied better to measurable independence of the judiciary and prosecution of high-level corruption.

Public administration and territorial reform emerged as a critical nexus between expert critique and grassroots realities. Both groups criticised the limited progress in the implementation of the amalgamation process, due to ineffective incentive policies. However, some also mentioned the marginalisation of local public administrations (LPAs), politicised resource distribution, and still weak local capacity. MDA14 warned: "Without strong municipalities, EU integration risks becoming a Chișinău-only affair." The EU's Moldova Growth Plan was widely seen as an opportunity to rebalance centre-periphery disparities. "Investments have to start where people feel abandoned," stated MDA24. Alignment with EU cohesion policy was considered essential to unlock structural funds and ensure equitable development. This underscores the need for EU support of the territorial reorganisation, including municipal amalgamation. This is essential to enhance administrative efficiency and reduce fragmentation.

Economic resilience, particularly among SMEs, was framed as both a strategic challenge and a symbolic test of EU accession. Experts expressed concern over unbuffered liberalisation, while grassroots participants pointed to policy inconsistency and the erosion of traditional markets. "You can't expect SMEs to compete under EU rules without helping them meet the standards," observed MDA26, and added that "We are moving from east to west economically, but people are still stuck in the middle. The EU needs to help businesses adapt—not just liberalise the market." Support for export reorientation, value chains, and vulnerable sectors was seen as crucial. MDA30 remarked: "If you want pro-European votes, help the farmer who just lost his market in Russia understand what comes next." With Moldova preparing to align with the EU's Common Commercial Policy, participants called for a calibrated transition supported by targeted compensatory measures. EU assistance should include export reorientation schemes, support for industrial restructuring, investment in value-added chains, and tailored aid for sectors vulnerable to competition or loss of CIS market access. The success of the DCFTA is a strong foundation, but public voices underscored the need to explain and manage the transition better.

Infrastructure, energy security, and rural investment were frequently mentioned as the bedrock of resilience. Participants underlined disparities in transport, digital access, and basic services. MDA11 stressed: "You can't build resilience without basic infrastructure. That's the frontline." Investments in energy diversification and renewable technologies were seen as both climate and security imperatives. MDA06 summed up: "We can't talk about resilience if some villages still rely on firewood." Building on the emergency energy support of EUR 310 million, participants recommended deeper EU involvement in energy diversification, renewables, and infrastructure development to reduce dependency and foster connectivity. The Growth Plan's investment pillar should target rural-urban equity and logistical bottlenecks.

Strategic communication and resilience against hybrid warfare emerged as a recurring theme across both expert and general focus groups. While technocratic messaging and the concentration of EU narratives among government actors remained points of criticism, many acknowledged the progress made since 2022. The establishment of the Centre for Strategic Communication and Countering Disinformation marked a turning point. "The state is finally learning to communicate, not just to inform," said MDA08. Focus group participants demanded value-driven, localised messaging. "Communication has to be emotional, not just technical," stressed MDA02. Campaigns led by civil society and independent media in 2024 were praised for their resonance at the community level. "You can't fight propaganda with silence," said MDA10. Still, interviewees stressed the need for continuity, regional inclusion, and narratives adapted to Moldova's linguistic and cultural diversity. "We're still missing narratives that speak to Gagauzia or to the north," warned MDA14. Thus, EU support for StratCom resilience should prioritise multilingual information campaigns, local dialogue initiatives, and partnerships with schools, churches, media, and community influencers.

As for the *security and defence capacities*, the European Peace Facility (EPF), which has allocated up to EUR 197 million in support to Moldova since 2021, was recognised by participants, particularly in the expert group, as essential for strengthening national defence institutions and enhancing Moldova's interoperability with EU and NATO standards. With EPF support, Moldova's armed forces have been able to improve operational effectiveness, modernise critical infrastructure, and better protect civilians and vital assets. Further EU assistance in this area should align with Moldova's recently revised security and defence strategies and support participation in EU CSDP missions.

Education reform was viewed as a pillar of societal resilience. Participants raised concerns over outdated curricula, weak civic education, and underrepresentation of minority voices. "Education reform must include identity and pluralism," argued MDA20. MDA29 called civic education "the foundation for responsible EU citizenship." MDA17 highlighted education's role in democratic resilience: "Education for democracy is more important now than media literacy." Investment in education was seen as central to long-term societal resilience.

A recurring theme across all groups was the need to democratise Moldova's EU accession. While recent civil society involvement in government-led working groups was welcomed, interviewees emphasised broader societal participation. "The only way this works is if it's participatory, not performative," said MDA31. Concerns were raised about politicisation of the reform agenda. "If only one part of the political spectrum supports EU integration, the project risks being reversed after every election," noted one civil society leader.

Across all policy areas, one consistent message emerged: Moldova's EU integration must be more than a governmental objective—it must be a shared national endeavour, as now reflected in the Constitution. Strategic support from the EU and international partners should extend beyond central institutions to prioritise local public authorities, SMEs, and civil society organisations that operate closest to citizens and are most capable of sustaining reform. To build genuine resilience, this support must strengthen the social contract, empower pluralism, and deepen local ownership—from Chisinau to the most remote villages. Moldova does not lack ambition—it needs partners equally committed to rooting reforms in public trust and ensuring that the journey to EU membership leaves no one behind. Moldova's path to resilience runs not only through Brussels, but through Cahul, Taraclia, Ungheni, Comrat, Balti or Edinet.

Conclusions

The findings of this report underscore a growing convergence of views across Moldovan society: the country's European integration is no longer merely a strategic aspiration but a perceived societal necessity. From policy experts in Chișinău to citizens with more general background, it becomes even clearer that Moldova's EU path must be anchored in credibility, inclusion, and resilience. This is not a passive expectation of alignment, but a demand for a transformative, co-owned process that delivers tangible results. EU integration must be a whole-of-society project, deeply rooted in public trust and shared ownership.

Since 2022, when Moldova became an EU candidate, the country has made meaningful progress in laying the institutional and legislative foundations for EU accession. The launch of accession negotiations, the adoption of the National EU Accession Programme (PNA) and Reform Agenda linked to the EUR 1.9 billion Growth facility, mark critical milestones. However, both expert and general focus group participants emphasised the fragility of these achievements. Reforms are often perceived as superficial, with implementation lagging behind legal frameworks. Justice reform, being a flagship of the reform agenda, continues to suffer from delays, poor enforcement, and resistance from entrenched interests. These gaps have perpetuated a trust deficit that hinders public belief in the state's capacity to deliver.

Security is another dominant theme, reframed in comprehensive terms. Moldova's exposure to Russian hybrid warfare, ranging from military presence in Transnistria to disinformation campaigns and proxy political actors, is perceived as both immediate and structural. But what emerges powerfully from the focus groups and interviews is a mature understanding of resilience. Moldovans no longer define security solely in terms

of state defence. They increasingly associate it with functional institutions, inclusive policymaking, and psychological well-being. Investment in human security, accessible healthcare, quality education, and responsive governance   is seen as fundamental to countering external threats and reinforcing democratic stability.

The October 2024 referendum on EU integration, though narrowly passed, served as both a symbolic milestone and a mirror to societal divides. The 50.4 % support it garnered confirmed Moldova's European trajectory but also exposed generational, geographical, and linguistic gaps that cannot be ignored. Participants noted that geopolitical choice cannot replace social cohesion. To truly consolidate its European course, Moldova must prioritise national unity built on shared opportunities and inclusive development. Youth, minorities, and marginalised communities must not only be consulted but also empowered as protagonists in this process.

Public expectations regarding EU integration are evolving. Stakeholders consistently called for a more transparent, participatory, and accountable accession process. The inclusion of civil society, local public authorities, business associations, and trade unions in EU negotiation structures was welcomed, but it must go beyond symbolic gestures. There is a strong push for co-creation and bottom-up engagement. Participants warned against performative reforms mimicking EU templates without contextual relevance or ownership. Instead, they called for genuine deliberation, improved strategic communication and reforms that resonate with citizens' real-life experience.

Strategic communication was a recurring theme across all focus groups. Participants consistently stressed the need for value-based, localised, and emotionally resonant messaging. They called for narratives that speak to Moldova's pluralism, explain reforms in tangible terms, and enlist trusted community actors as messengers. Communication must cease to be transactional and become transformative. "Don't talk about acquis chapters," one participant said, "talk about fixed roads, hired teachers, and heating in winter." A particular insight from the fieldwork is the shift in how Moldovans frame agency. The narrative is no longer one of waiting for change from Brussels or Chișinău, it is one of shaping change locally. Mayors, activists, journalists, and community leaders alike stressed the need for empowerment at the local level. They identified demographic decline, regional inequalities, and identity cleavages not only as challenges, but as policy arenas where targeted EU support and national leadership could drive real transformation.

In this light, EU support must move beyond capacity-building to a model of co-responsibility. Moldova's reform trajectory, accelerated by the accession negotiations and tested by the 2025 parliamentary elections, will only succeed if it is inclusive, credible, and firmly rooted in the social contract. The EU's Moldova Growth Plan, energy diversification projects, and public administration reform, are all critical, but so is the investment in trust: ensuring that what is promised in legislation is felt in people's daily lives.

The perceptions gathered for this report portray a society that is neither fatigued nor naive. Moldovans remain alert to the threats they face, while becoming increasingly clear-eyed about the European future they aspire to, one rooted in dignity, participation, prosperity, and greater security. Yet, internal vulnerabilities persist and are actively exploited by external adversaries and anti-reform actors seeking to sow division. Citizens are calling for a deeper, more genuine partnership with the EU, one that not only helps them

withstand destabilisation, but also enables them to shape resilience on their own terms. As one participant observed, "Resilience doesn't mean resisting change, it means being strong enough to shape it."

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Interview Code	Type of Stakeholder	Country
MDA01	Civil Society	Republic of Moldova
MDA02	Government Official	Republic of Moldova
MDA03	Government Official	Republic of Moldova
MDA04	Government Official	Republic of Moldova
MDA05	Government Official	Republic of Moldova
MDA06	EU Expert (EUPM)	Republic of Moldova
MDA07	Member of Parliament	Republic of Moldova
MDA08	Civil Society (Former Government Official)	Republic of Moldova
MDA09	Government Official	Republic of Moldova
MDA10	Government Official	Republic of Moldova
MDA11	Government Official	Republic of Moldova
MDA12	Member of Parliament	Republic of Moldova
MDA13	Civil Society	Republic of Moldova
MDA14	Member of Parliament	Republic of Moldova
MDA15	Government Official	Republic of Moldova
MDA16	Civil Society	Republic of Moldova
MDA17	Government Official	Republic of Moldova
MDA18	Business Association	Republic of Moldova

MDA19	Member of Parliament	Republic of Moldova
MDA20	Government Official	Republic of Moldova
MDA21	Independent Regulatory Body	Republic of Moldova
MDA22	Civil Society	Republic of Moldova
MDA23	International research centre	Republic of Moldova
MDA24	Civil Society	Republic of Moldova
MDA25	Civil Society	Republic of Moldova
MDA26	Business Association	Republic of Moldova
MDA27	Civil Society	Republic of Moldova
MDA28	International political foundation	Republic of Moldova
MDA29	Independent Regulatory Body	Republic of Moldova
MDA30	Government Official	Republic of Moldova
MDA31	EU Expert (EU Delegation in Moldova)	Republic of Moldova

5.6.2. Focus group discussions

Focus group discussion	Group	Place and Date
Focus group with experts	Civil society representatives, academia, former officials, businesspersons	Chișinău, 04.02.2025
Focus group with citizens	Miscellaneous	Chișinău, 04.02.2025

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6. MONTENEGRO

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6.1. Introduction

This country report explores local perceptions of external state actors and their influence in Montenegro. By understanding these perceptions of foreign influence – whether in the form of political interference, economic dependency, security threats, or cultural and religious soft power – this report contributes to a policy-relevant understanding of resilience. In particular, it aims to highlight where local actors believe the EU/Western partners can and should provide more effective support to counter malign influence, strengthen democratic institutions, and help embed Montenegro more in the European and transatlantic community.

This analysis builds upon the findings of prior REUNIR studies, including the mapping of existing surveys on the perceptions that actors in EN & WB have (Pollozhani *et al.,* 2025). This data is complemented with qualitative field research conducted through interviews and focus groups with stakeholders across civil society, state institutions, academia, and the broader public. As identified in earlier stages of research, external threats are categorised in three main pillars: military, socio-economic, and political, each assessed in terms of perceived threats, opportunities, and resilience.

Montenegro faces no direct military threats in the conventional sense, largely due to its membership in NATO. Despite the country's limited national military capacity, NATO integration provides a collective security guarantee. That said, Montenegro's reliance on this structure means its defence remains vulnerable should the integrity or cohesion of NATO weaken. Also, while traditional military threats are absent, hybrid threats, such as cyberattacks, are of growing concern. Montenegro's greatest strength in terms of resilience against foreign threats lies in its NATO membership and its overwhelming public support for the EU.

When it comes to economic threats, they mainly stem from countries such as Russia, China, Türkiye, and the Gulf States. Russia remains influential through ownership of real estate and tourism infrastructure, with many Russians maintaining economic stakes in Montenegro. China's involvement, notably in infrastructure projects, such as the construction of the highway, represents a strategic relationship. However, like in other parts of the Western Balkans, Chinese investment is seen as a double-edged sword – economically appealing but misaligned with EU transparency and procurement norms, while also raising concerns about potential overreliance on Chinese loans. Türkiye and the Gulf states are described as important economic players, that may not pose a direct threat currently, but their unregulated nature of capital inflows and labour migration, as well as lack of transparency surrounding such deals, risk weakening democratic accountability and raise concerns about money laundering and grey market activities.

On the other hand, the majority of Montenegro's population is aware that the EU is the biggest foreign donor to Montenegro. In terms of trade, the EU is Montenegro's most significant partner, followed by Serbia, while China, Türkiye, and Russia account for smaller proportions of the country's overall trade volume (Pollozhani *et al.,* 2025). But large influx of investments from Russia and China primarily, poses a significant socio-

economic threat to Montenegro (Akhvlediani *et al.*, 2025). When asked about the motivations behind Russian and Chinese investments, one-third (or in the case of China more than one-third) of the population believes that while such investments may offer economic benefits to Montenegro, they are consistently accompanied by political expectations or conditions (Pollozhani *et al.,* 2025). Additionally, 23 % of citizens view Russian investment primarily as a tool for exerting geopolitical influence and control over the country (Pollozhani *et al.,* 2025).

While its formal alignment with NATO and the European Union underpins the country's long-term strategic orientation, Montenegro faces a persistent set of external political threats that challenge the foundations of its democratic institutions and derail or delay EU integration process. Montenegro faces both direct and indirect pressures from foreign actors, particularly Serbia and Russia. Serbia is often perceived as a channel of Russian influence in Montenegro, which can also hinder Montenegro's path to the EU.

While just over 71 % of Montenegrin citizens view EU membership as a foreign policy priority, and 79 % would vote in favour of accession, the persistence of favourable attitudes toward Russia and Serbia remains a point of concern. According to a public opinion poll from 2024, 39 % of respondents expressed a positive view of Serbia, and 24 % held similar sentiments toward Russia. Notably, half of the population reported having a very or somewhat favourable opinion of Vladimir Putin. Among international and regional leaders, only Recep Tayyip Erdoğan received higher approval, with 56 % of respondents viewing him positively (Pollozhani *et al.,* 2025).

These attitudes can largely be attributed to enduring historical, cultural, and religious ties with Serbia and Russia. They are also reflected in the current composition of Montenegro's governing coalition, which includes parties with openly pro-Russian and Serbian nationalist orientations. As a result, there is a growing perception that the government of Montenegro is pro-European only "on paper."[9] While officially the government continues to articulate a clear and consistent commitment to the EU accession process, these conflicting influences further complicate the situation.

These are some of the main findings that will be further elaborated in the analysis, while also assessing Montenegro's resilience to such threats, and finally identifying policy areas in which the EU or NATO can engage to enhance Montenegro's resilience to foreign (malign) influences.

6.1.2. Methodology

This analysis is based on data gathered through fieldwork in Montenegro, as part of the wider field research conducted in the Western Balkans and Eastern Neighbourhood countries. The methodology was designed to explore how stakeholders and citizens from Montenegro perceive the role and influence of key external actors, including the EU, Russia, China, Türkiye, and others. The overarching goal was to better understand the types of political, military, and socio-economic threats these actors may pose, and to identify both vulnerabilities and opportunities for building resilience in the country.

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[9] Interview with a policy analyst, conducted on 19 March 2025

The research was implemented in three phases. The first phase focused on preparatory work, beginning with a comprehensive mapping of existing surveys and academic studies on perceptions of foreign influence (Pollozhani *et al.,* 2025). This initial review helped identify priority policy areas and shaped the development of a common methodological framework for the field research. In the preparatory phase, a detailed interview questionnaire was co-designed by researchers from across the consortium to ensure cross-country comparability and to serve the broader analytical needs of the project.

The second phase involved identifying and selecting stakeholders for interviews, as well as preparing and organising focus group discussions in each of the nine countries. The selection process was guided by a set of principles to ensure diversity and representativeness. Each country included at least three interviewees per thematic area – security, socio-economic, and political pillar. Researchers also aimed for gender balance, ideological diversity, and the inclusion of voices from marginalised groups (including ethnic, religious, and other minority groups). In parallel, two focus group discussions were held in each country: one with citizens and one with professionals and experts. Both groups were selected with attention to ensuring a balance of gender and perspectives.

The third and final phase was the implementation of the field work itself. A total of 283 interlocutors were interviewed across the nine countries. In Montenegro specifically, 31 individuals participated in either interviews or focus groups, including 16 men and 15 women, indicating a nearly even gender balance. The table below provides data on the number of interlocutors per sector.

Country	Academia	Civil society	State institutions	Private sector	Political parties	Other	Men	Women	Total
Montenegro	5	9	6	0	0	11	16	15	31

The highest number of interlocutors came from civil society organisations. This strong representation highlights the openness of the civil sector to engage in dialogue on issues of foreign influence and the country's resilience. The majority of participants from state institutions were affiliated with the Ministry of European Affairs and the Ministry of Foreign Affairs. However, representation from other key institutions, particularly the Ministry of Defence, was limited, with only one interviewee. This presents a potential gap in perspectives related to security and defence policy. No representatives from the private sector or political parties were included, despite outreach efforts. The absence of voices from the business community limits insights into the economic dimension of resilience.

The category "other," comprising 11 participants, includes citizens who participated in focus group discussions as well as journalists. The inclusion of citizens with diverse backgrounds, for example individuals working in trade, public services, students, and media professionals, was a deliberate effort to capture different perspectives. The conversations provided insights into how different segments of society understand external threats, assess the EU's role, and envision ways to enhance national and regional resilience.

6.2.   Perceptions on external actors in Montenegro

6.2.2. Context

Montenegro, a NATO member and EU candidate country, stands at a crossroads between democratic consolidation and persistent exposure to malign foreign influence. The accession negotiations with Montenegro started in June 2012. During this time, all the 33 screened chapters have been opened, of which three are provisionally closed (European Commission, n.d.). Montenegro is widely perceived as a frontrunner in the EU accession process among other Western Balkan countries. Additionally, Montenegro became a NATO member in 2017.

The country's NATO membership is viewed as a foundational security guarantee. The limited size and capacity of Montenegro's armed forces remain a key constraint. The military is extremely small, with no independent capability to secure national airspace, relying entirely on NATO for this function, and lacking sufficient resources to patrol its maritime territory without assistance from partner countries. Despite some reforms since joining NATO, there is a broad consensus among the interlocutors interviewed during the field work, that Montenegro has minimal capacity for self-defence (MNE73, 2025).[10]

Montenegro's economy is heavily reliant on tourism and constrained by a limited production and export base, with exports accounting for only about 20 % of imports. This persistent trade imbalance, especially with countries like China, creates structural vulnerabilities and deepens economic dependence, which could be exploited in times of geopolitical tension. While remittances help sustain domestic demand, they are insufficient to reduce long-term vulnerability (Akhvlediani *et al*., 2025).

6.3.   Military threats, opportunities and resilience

While the country faces no immediate conventional military threats, the security environment in Montenegro is shaped by hybrid threats. Montenegro's small size, limited military capabilities, and internal political fragmentation expose vulnerabilities that external actors, including Russia, Serbia, and to a lesser extent, China, may seek to exploit.

6.3.1. Perceptions on the military threats from external state actors

Montenegro's NATO membership is broadly seen as the primary deterrent against conventional military aggression. For example, Russia, despite its geopolitical hostility, cannot realistically project conventional military power in the Adriatic, particularly due to NATO presence and geographic distance (MNE77, 2024).[11] Therefore, all interviewed local experts agree that direct military threats to Montenegro are highly unlikely as long as NATO remains cohesive and credible. However, the country's dependence on NATO is absolute – Montenegro has limited naval capacity and a minimal autonomous defence infrastructure. If NATO's future

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[10] Interview with a civil society expert on foreign policy, conducted on 8 April 2025

[11] Interview with a civil society representative, conducted on 27 December 2024

were to become uncertain, Montenegro's inability to defend itself independently would present a major strategic vulnerability (MNE73, 2025).[12]

When it comes to the country's cooperation with the EU institutions and mechanisms related to defence, Montenegro has expressed interest in participating in PESCO, particularly in areas like cybersecurity and hybrid threats, but has not yet been formally invited to join any specific project. The Permanent Structured Cooperation (PESCO) is a defence cooperation mechanism for EU Member States, but it allows for the exceptional participation of third countries, provided they meet specific political and legal conditions (EEAS, 2023). Of the candidate countries, only Serbia and Ukraine currently meet the necessary legal requirements to engage with the EU in this framework.

While traditional military aggression against Montenegro is not viewed as imminent, hybrid threats, especially cyberattacks, are considered significant. Russian influence was particularly observed in the period leading up to Montenegro's accession to NATO. During that time, various groups operating as pro-Russian proxies, were active in the country and engaged in coordinated anti-NATO campaigns, trying to influence public perception on NATO. But since Montenegro's accession to NATO, which suggested failure of Russian efforts, this type of direct Russian activity with the aim of immediate destabilisation, is not perceived (MNE69, 2025).[13]

However, in 2022, a major cyberattack targeted government institutions, severely disrupting public administration. While it was not possible to definitively attribute the attack, the National Security Agency indicated that it likely originated from Russian actors (Free Europe, 2022). An interviewee from the Montenegrin Ministry of Defence pointed out that the aim of Russia's hybrid activities in the Western Balkans may be to contribute to regional destabilisation as a means of diverting the attention of the West, and NATO in particular, away from the ongoing situation in Ukraine (MNE78, 2024).[14] Therefore, although the Russian threat in the cyber and hybrid domain may currently appear less visible than before Montenegro's NATO accession, it remains a persistent and non-negligible risk (MNE73, 2025).[15]

Montenegro's public administration has not yet fully recovered from this cyberattack. As one interlocutor underlined, "capacities are very weak... we cannot recover from a cyber attack on the infrastructure of government institutions for almost three years, for which it was not even possible to determine who was behind it. Some websites and email accounts are still not functional" (MNE73, 2025).[16] The attack underscored the country's limited cyber resilience and highlighted the threat of non-attributable, high-

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[12] Interview with a civil society expert on foreign policy, conducted on 8 April 2025

[13] Interview with a representative of the Montenegrin Ministry of European Affairs, conducted on 19 March 2025

[14] Interview with a state official, conducted on 24 December 2024

[15] Interview with a civil society expert on foreign policy, conducted on 8 April 2025

[16] Ibid.

impact operations that can undermine critical infrastructure without crossing conventional military thresholds (MNE75, 2025).[17]

To address hybrid threats and bolster cybersecurity, Montenegro has received assistance from the EU and NATO. For example, in response to Russian-linked cyberattacks in 2016–2017, NATO deployed its first Counter-Hybrid Support Team to Montenegro in 2019 (Janković, 2019). NATO also provided operational and forensic assistance during later cyber incidents. Moreover, in December 2023, the EU launched a "Rapid Response" cybersecurity package worth €1.8 million for Albania, Montenegro, and North Macedonia (EEAS, 2023). This funding enhances their ability to detect, prevent, and respond to cyberattacks, supports incident data sharing, and fosters coordination with EU partners.

China is considered a growing strategic concern, although not an immediate military threat. Its engagement in Montenegro has so far been predominantly economic. However, there is increasing concern about the potential strategic implications of Chinese involvement, especially with regard to dual-use technologies and infrastructure that could be exploited for intelligence-gathering or other strategic purposes. Therefore, although China has not yet entered Montenegro's defence sector, experts are cautious about its presence in the region (MNE78, 2024).[18]

Regional instability, particularly involving Kosovo-Serbia relations, is seen as a potential security flashpoint. Any escalation in Serbia-Kosovo tensions or in Bosnia and Herzegovina could have spillover effects. These may not manifest as full-scale wars but possibly as tactical provocations, like the Banjska incident in northern Kosovo, or escalatory political crises, exploited by foreign powers to fragment Euro-Atlantic unity (MNE78, 2024).[19]

Kosovo-Serbia tensions are especially perceived as a potential trigger that could resonate domestically, polarising public opinion and threatening internal cohesion (MNE68, 2025).[20] This is because in Montenegro, the issue of Kosovo's independence remains highly sensitive. Certain political proxies and parties in Montenegro have actively campaigned in favour of taking sides in the Serbia-Kosovo dispute, further polarising public opinion. Nonetheless, Montenegro's official stance recognises Kosovo as a partner and an independent state within the region (MNE69, 2025).[21]

Serbia is often perceived as a potential security threat, especially due to the Serbian leadership's promotion of the so-called "Serbian world" (Srpski svet). This concept was first publicly articulated in 2020 by then–Minister of Defence Aleksandar Vulin and has since been regularly used in public appearances (AlJezeera 2020). The idea behind this concept is the political unification of Serbs across the region, with president Vučić being the president of all Serbs, and Belgrade being the centre of their gathering and political coordination.

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[17] Intervirew with a representative of the Delegation of the EU to Montenegro, conducted on 19 March 2025

[18] Interview with a state official, conducted on 24 December 2024

[19] Interview with a state official, conducted on 24 December 2024

[20] Interview with an academic/expert on foreign policy, conducted on 20 March 2025

[21] Interview with a representative of the Montenegrin Ministry of European Affairs, conducted on 19 March 2025

The fact that the current regime in Belgrade appears to include Montenegro within this conceptual framework has raised concerns and provoked divided opinions.

On one hand, several experts view that Serbia's aim to control what it sees as its sphere of influence is a potential threat to Montenegro's sovereignty. As one interlocutor highlighted, "Vučić's Serbia conflicts its policy of statehood with Montenegro's policy of statehood" (MNE73, 2025).[22] On the other hand, part of the expert community argues that the announcements of "Serbian world" and unity of all Serbs is only used to distract attention from domestic problems in Montenegro, rather than as a concrete strategy. Public opinion polls show that the division between separatists and unionists in Montenegro is outdated – over 80 % of citizens have no doubts about Montenegrin sovereignty, and only around 12 % support unification with Serbia (Focus group discussion with experts, 2025).

Some local experts see a current security concern in Montenegro stemming from the unregulated entry of hundreds of individuals from both Ukraine and Russia, particularly the latter, without adequate background checks, which is possible because of the existing visa-free regime with these two countries. The lack of oversight raises the risk that individuals with pro-Putin affiliations or ties to foreign security services may have entered the country (MNE72, 2025).[23] However, this is likely to change in the future because Montenegro is obliged to gradually harmonise its visa policy with the EU visa policy (CDM, 2024). This means that Montenegro plans to phase out visa-free access for citizens of countries like Russia.

This situation is further exacerbated by existing societal divisions and weaknesses within Montenegro's security institutions. Of particular concern is the leadership of the National Security Agency, which is currently headed by an individual with no prior experience in the security sector. His appointment appears to be based primarily on political connections to the current government, or as one respondent pointed out more precisely, "he has no prior expertise, but he is close to the prime minister" (MNE72, 2025). [24] Also, reports have linked him to one of Montenegro's prominent criminal clans (Vijesti, 2024). These factors collectively contribute to a heightened risk to national security.

6.3.2. Opportunities and resilience factors

Montenegro's NATO membership is consistently highlighted as the cornerstone of its defence architecture. It deters conventional military aggression, provides access to collective intelligence and cybersecurity mechanisms, offers political legitimacy in the international arena, and provides crisis response capabilities. For example, during the 2022 cyberattack on Montenegro's critical infrastructure, NATO structures were mobilised to assist. This type of technical support was viewed as extremely helpful considering that Montenegro cannot yet independently respond to sophisticated cyber threats.[25] Recent initiatives, such as

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[22] Interview with a civil society expert on foreign policy, conducted on 8 April 2025

[23] Interview with a policy analyst, conducted on 19 March 2025

[24] Interview with a policy analyst, conducted on 19 March 2025

[25] Interviews with state officials and academics, conducted on 18 and 19 March 2025

the opening of the Western Balkans Cyber Capacity Centre in Podgorica, signal progress in a critical domain. [26] However, these efforts are still developing and are not perceived yet as contributing to infrastructure reinforcement (MNE68, 2025).[27]

Despite internal divisions, there is a broad political and societal consensus in support of EU integration and NATO membership. Even populist and pro-Serbian parties avoid openly opposing NATO, recognising the political cost of such a stance (MNE73, 2025).[28] This consensus provides a strategic anchor for reform and shields Montenegro from drastic foreign policy shifts during political transitions.

Unlike Russia or Serbia, Türkiye is perceived as a constructive force within the NATO framework. Turkish influence, particularly in countering radicalisation and maintaining stability within Muslim communities, has been viewed positively (MNE78, 2024).[29] Montenegro experienced only a limited number of foreign fighters joining conflicts in Syria and saw minimal activity from unregulated religious groups (paradžemats), which is often attributed to the engagement and stabilising influence of Türkiye. In this context, Turkish influence was widely regarded as a constructive factor in preventing extremist trends and maintaining social cohesion (MNE73, 2025).[30] Türkiye's active role in NATO operations, particularly in Kosovo (through KFOR) and bilateral cooperation with Montenegro, are seen as examples of productive regional engagement (MNE78, 2024).[31]

Montenegro's resilience lies in its alliances, public support for Euro-Atlantic integration, and emerging cybersecurity efforts. However, this resilience has some limits: in regard to military dependency (without NATO, Montenegro is indefensible – dependency on NATO can be challenging in current geopolitical circumstances when the future of NATO is not entirely clear).[32] Also regarding cyber insecurity – critical infrastructure remains vulnerable to further attacks. Finally, an important vulnerability lies in institutional fragility – corruption, political appointments, inefficiency of the public service, and lack of expertise in key positions, such as in the National Security Agency, undermine internal readiness (MNE72, 2025).[33] Resilience, therefore, depends not only on external partnerships but also on internal reforms, particularly in governance, security, and institutional capacity.

6.4. Socio-economic threats, opportunities and resilience

Montenegro's economy remains structurally fragile, shaped by a limited production base, a heavy reliance on tourism, persistent trade deficits, and dependence on foreign capital. These vulnerabilities have made the

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[26] Interview with a state official, conducted on 19 March 2025

[27] Interview with an academic/expert on foreign policy, conducted on 20 March 2025

[28] Interview with a civil society expert on foreign policy, conducted on 8 April 2025

[29] Interview with a state official, conducted on 24 December 2024

[30] Interview with a civil society expert on foreign policy, conducted on 8 April 2025

[31] Interview with a state official, conducted on 24 December 2024

[32] Interview with a civil society expert on foreign policy, conducted on 8 April 2025

[33] Interview with a policy analyst, conducted on 19 March 2025

country susceptible to external influence, particularly from non-Western actors such as Russia, China, Türkiye, and the Gulf states.

6.4.1. Perceptions on the socio-economic threats from external state actors

Russian influence was deeply ingrained in Montenegro's economy, particularly through tourism and real estate investments. Russian citizens' ownership of assets is often considered a potential threat because it constitutes a latent form of dependency on Russian tourists (MNE75, 2025).[34] Additionally, since the beginning of Russian aggression against Ukraine, many Russians moved to Montenegro. While the motivations of Russian emigrants vary – some fleeing the regime, others possibly aligning with it – the lack of transparency around their presence and wealth makes it difficult to assess their political or strategic intentions (MNE77, 2024).[35] Although their presence would not directly constitute a security threat, the larger presence of Russians might have been used by Russian intelligence to increase their presence in Montenegro.

Another difficulty regarding the arrival of Russians and Ukrainians after 2022 is related to its potential volatility. Their consumer spending and real estate purchases are viewed as a source of risk rather than long-term stability. A sudden departure of these populations could trigger a recession in key urban centres like Podgorica (MNE77, 2024).[36] Experts agree that while the presence of Russian capital and residents is not inherently malign, it creates structural dependency that could be weaponised during geopolitical tension or through coordinated withdrawal.[37]

China is identified as a source of economic vulnerability, particularly due to poorly negotiated infrastructure projects, such as the controversial Bar–Boljare highway, which left Montenegro with significant debt and questionable returns. This initiative, financed through a Chinese loan with non-transparent terms, raised many concerns, including debt dependence, which may constrain political autonomy, circumvention of procurement standards, leading to corruption and institutional erosion, as well as negative influence on EU alignment, especially regarding fiscal transparency and environmental standards (MNE73, 2025).[38]

The highway project is demonstrative of Montenegro's challenges with large-scale, externally financed infrastructure. While the loan was refinanced, the burden remains, and EU institutions are cautious of any continued Chinese dominance in state tenders. The reason why European companies often fail to compete is due to higher costs or procedural constraints, which makes Chinese offers more attractive, but politically

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[34] Intervirew with a representative of the Delegation of the EU to Montenegro, conducted on 19 March 2025

[35] Interview with a civil society representative, conducted on 27 December 2024

[36] Ibid.

[37] Interviews with a representative of the Delegation of the EU to Montenegro and a state official, conducted on 19 March 2025

[38] Interview with a civil society expert on foreign policy, conducted on 8 April 2025 73

sensitive. The broader concern is that economic pragmatism may run counter to strategic EU alignment, and this tension continues to shape Montenegro's procurement decisions (MNE69, 2025).[39]

This project is characterised by some local experts as an "economic act of terrorism." Not only did it create significant public debt, but also the problems are perceived in subcontracting which was manipulated to benefit companies close to the ruling elite (MNE77, 2024).[40] Experts warn that this dependency on China's investments promotes state capture and undermines political sovereignty, particularly due to concerns that strategic assets, such as the Port of Bar, could be leveraged in the event of loan repayment difficulties (MNE69, 2025).[41] Citizens are also worried that China's economic presence can become more than that – "the question is when economic influence will turn into political. China is interested in corruption and how their companies can enter the market, because the Western Balkans is a gateway to Europe" (Focus group discussion with citizens, 2025).

After the first section of the Bar-Boljare highway was constructed by a Chinese company, funded through a loan from the Chinese Exim Bank, the construction of the second section of the highway is supported by the European Commission grant and a loan from the European Bank for Reconstruction and Development (EBRD), aiming to prevent a repetition of the Chinese way of doing the project. Nevertheless, economic threats posed by China should not be overlooked, especially given the involvement of Chinese companies in other projects as well, such as the reconstruction of the Tivat-Budva road and the reconstruction of the Pljevlja thermal power plant (Janković, 2025).

Over the past five years, Turkish presence in Montenegro is increasingly visible in the form of immigration and business creation. Turkish nationals are active across various economic sectors, including technology, retail, food delivery, and construction. This migration is not monolithic – some are likely escaping political repression under Erdoğan, while others are simply seeking better opportunities (MNE77, 2024).[42] The attractiveness of Montenegro – low taxes, EU potential, NATO security, and loose oversight – makes it fertile ground for both legitimate and illicit Turkish interests (MNE71,2025).[43] Experts suggest that the influx of Turkish nationals and the establishment of private businesses in Montenegro coincide with the country's accelerated EU accession process, indicating their potential aim to access the EU market. However, the impact of Turkish economic presence on Montenegro is still understudied (MNE77, 2024).[44] Apart from some investments through TIKA, the Turkish state plays a relatively limited direct economic role compared to Turkish individuals and businesses.

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[39] Interview with a representative of the Montenegrin Ministry of European Affairs, conducted on 19 March 2025 69

[40] Interview with a civil society representative, conducted on 27 December 2024 77

[41] Interview with a representative of the Montenegrin Ministry of European Affairs, conducted on 19 March 2025

[42] Interview with a civil society representative, conducted on 27 December 2024 77

[43] Interview with an academic, conducted on 31 March 2025 71

[44] Interview with a civil society representative, conducted on 27 December 2024 77

As experts explained during the focus group discussion, Türkiye is following a new geopolitical doctrine: Neo-Ottomanism. It is working on a return to the Balkans because it sees the Western Balkans as a gateway to the EU, and potentially believes that through these countries, it could build an oil pipeline to replace the EU's current energy supply routes. "Türkiye's geopolitical stance is undefined – on one hand, it is NATO's second-strongest military member in Europe, but on the other, it often cooperates with Russia, especially in unstable, critical regions like the Middle East. Türkiye has the ability to undermine Western influence in those areas by occasionally aligning with Russia." (Focus group discussion with experts, 2025).

Similarly, investments from Gulf states, most notably the UAE, raise concerns due to their opaque nature. A 2025 investment deal involving Ulcinj's Great Beach, marked by non-transparent procedures, questionable motives, and potential corruption, highlights the risk of erosion in democratic governance and the legal order (MNE73, 2025).[45]

UAE investors also acquired Porto Montenegro, a luxury marina and real estate complex. While the purchase itself was uncontroversial, the risk lies in a broader regional pattern of elite real estate development serving geopolitical interests, as seen in similar UAE-backed projects in Serbia. Such investments risk undermining transparency and democratic oversight and may serve as geopolitical tools (MNE77, 2024).[46]

6.4.2. Opportunities and resilience factors

Montenegro's socio-economic resilience is significantly undermined by its deep dependence on external economic actors – most notably Russia and China – coupled with a fragile domestic economic foundation. This vulnerability is exacerbated by structural limitations such as a narrow export base, overwhelming reliance on tourism and remittances, and insufficient institutional capacity to absorb and manage external shocks.

Public debt remains high, and a recent income tax reform has raised alarms about long-term fiscal sustainability. Without an increase in economic productivity or alternative revenue sources, this could drive Montenegro to seek further foreign loans, potentially opening the door to politically conditioned investment from non-EU actors (MNE75, 2025).[47]

Corruption and weak rule of law remain major deterrents to Western investment and generally to Montenegro's economy. As Montenegro's citizens have pointed out during the focus group, "the main problem is this level of corruption, not the foreign influences" (Focus group discussions with citizens, 2025).

Local experts perceive that EU-aligned investors view Montenegro as a high-risk environment compared to neighbouring countries such as Serbia or North Macedonia. The country has also demonstrated limited capacity to absorb EU funds efficiently, due to a combination of institutional, administrative, and structural challenges, such as weak administrative capacity and the lack of human resources, insufficient inter-

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[45] Interview with a civil society expert on foreign policy, conducted on 8 April 2025 73

[46] Interview with a civil society representative, conducted on 27 December 2024 77

[47] Intervirew with a representative of the Delegation of the EU to Montenegro, conducted on 19 March 2025 75

institutional coordination among ministries and agencies involved in EU funds programming, but also widely spread corruption that is recognised as one of the main challenges. These limitations raise concerns about Montenegro's readiness to manage large-scale cohesion funding after EU accession (MNE70, 2025).[48]

6.5. Political threats, opportunities and resilience

The main state actors perceived to pose political threats to Montenegro are Serbia (primarily due to its role in facilitating Russian influence), Russia itself, and to a lesser extent, Türkiye and China.

6.5.1. Perceptions on the political threats from external state actors

Among all foreign state actors, Serbia is overwhelmingly identified as the most immediate political threat to Montenegro's sovereignty and democratic development, while some also perceive it as an obstacle to Montenegro's EU accession. This threat is understood as a form of soft and hybrid influence that is deeply intertwined with Montenegrin institutions, media, and political parties (MNE71, 2025).[49] Serbia's influence is manifested through cultural and religious ties, identity-based political divisions, political patronage networks, and media presence. These forms of influence are viewed as malign because they are channels of Russian interests. Serbia is widely viewed as a "regional hub" for exporting Russian influence in the Western Balkans (MNE72, 2025). [50]

One of the most powerful instruments of this influence is the Serbian Orthodox Church (SOC). Its ideological alignment with Serbian nationalist forces fosters polarising narratives about national identity and history. The SOC is described as "a parallel power structure" (MNE73, 2025)[51] in Montenegro or even as "the most powerful actor in Montenegro" (MNE72, 2025).[52] The SOC's ability to mobilise large portions of the population during moments of political crises underscores the extent of its influence. This was particularly visible during the 2020 protests and the events surrounding the 2019 Law on Religious Freedoms, which sought to transfer ownership of religious property without proper documentation to the Montenegrin state. The law triggered mass protests led by the Church, which played a significant role in the electoral defeat of the long-standing ruling party and the formation of a new, heterogeneous and unstable government (MNE72, 2025).[53] This moment illustrates the depth of the SOC's influence in Montenegro and, by extension, Serbia's political leverage.

The SOC is often perceived as a threat to Montenegro's sovereignty and to the region's stability because it "does not respect Montenegro's borders, as some of its dioceses also cover parts of other countries".

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[48] Interview with a professor in economics, conducted on 19 March 2025 70

[49] Interview with an academic, conducted on 31 March 2025 71

[50] Interview with a policy analyst, conducted on 19 March 2025 72

[51] Interview with a civil society expert on foreign policy, conducted on 8 April 2025 73

[52] Interview with a policy analyst, conducted on 19 March 2025 72

[53] Ibid. 72

Although the SOC is linked to the Russian Orthodox Church, Russian influence through the Church is perceived indirectly, mostly by amplifying pro-Russian and anti-Western sentiments.[54]

Serbian political ambitions are also grounded in the concept of the "Serbian World", which is a mirror image of Russia's own nationalist agenda. Through this framework, Serbia projects itself as a protector and central authority for Serbs across the region, including those in Montenegro, which is often perceived to be undermining Montenegrin sovereignty and identity.[55] This contributes to fuelling tensions in Montenegro, as identity-based political divisions between those identifying as Serbs and Montenegrins create fertile ground for manipulation. Although only a minority of citizens actively aligns politically with Belgrade, the sense of connection remains strong, and has often been politicised to serve domestic or foreign agendas.[56] For example, discussions over whether Serbian or Montenegrin should be the official language are divisive and often politicised.

In Montenegro, it is widely perceived that Serbia's and Russia's aim is to undermine Montenegro's sovereignty and Euro-Atlantic orientation, delay or derail its EU accession by creating instability and polarisation, reshape the domestic political landscape in a way that aligns with Serbian and Russian geopolitical goals, as well as weaken the multiethnic foundations of the state. This process includes Serbian efforts to institutionalise dual citizenship, change the status of the Serbian language, and demand proportional ethnic representation in public administration, which are all initiatives that challenge Montenegro's identity and democratic order.[57] It might be good to point out that the perceived Serbian threat is itself divisive.

The current regime in Belgrade is perceived as the primary actor exerting this type of influence in Montenegro, primarily by influencing Montenegro's political parties.[58] For example, the New Serbian Democracy, Socialist People's Party, and Democratic People's Party, are now part of the governing coalition. Although they present themselves as legitimate representatives of Serbian interests, most of them in fact act on behalf of Vučić's government. Therefore, pro-Serbian parties in Montenegro are seen as beyond sharing ideological and national identity links with Belgrade – they are direct political allies of President Aleksandar Vučić.[59] Serbia's ruling regime has successfully positioned political proxies in key Montenegrin institutions such as the Agency for National Security. This is seen as part of a larger strategy to not only undermine Montenegro's internal governance but also to create dependency and instability that could be intensified in times of political crisis in Serbia.[60]

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[54] Data from the focus group with experts, conducted in Podgorica on 18 March 2025

[55] Interview with a policy analyst, conducted on 19 March 2025

[56] Interview with a state official from the Ministry of European Affairs, conducted on 19 March 2025

[57] Interview with an academic, conducted on 31 March 2025

[58] Intervirew with a representative of the Delegation of the EU to Montenegro, conducted on 19 March 2025

[59] Interview with a civil society representative, conducted on 27 December 2024

[60] Interview with an academic/expert on foreign policy, conducted on 20 March 2025

The Serbian government's influence is further established through media, both the local and foreign ones. Local portals like In4S and Borba act as central pillars of pro-Russian and pro-Serbian messaging, regularly promoting disinformation, narratives hostile to NATO and the EU, and claims about alleged threats to the Serb population in Montenegro.[61] Media from Serbia is also very present in Montenegrin public space, either directly or through the ownership structure of Montenegrin media. Serbian pro-government tabloids such as Kurir, are being widely read in Montenegro.[62] This media ecosystem deepens existing divisions, spreads anti-Western propaganda and undermines democratic discourse.[63]

One striking example of Serbia's role going beyond soft power is the 2021 local elections in Nikšić, where political and media coordination, backed by actors from Serbia, sought to reshape electoral outcomes. A coordinated media campaign titled "Battle for Nikšić" was designed to amplify pro-Serbian voices and destabilise the democratic process.[64] With a significant number of Montenegrin citizens identifying as Serbs and consuming Serbian media, the actions and nationalist rhetoric of the Serbian government, and its political proxies, carry direct consequences in Montenegro.[65]

The perception of Russia as a political threat to Montenegro is shaped by various factors, including historical ties, geopolitical rivalry, relations with Serbia and hybrid influence. While many local experts acknowledge that Russia's visible presence has diminished in recent years, particularly following the full-scale invasion of Ukraine and Montenegro's alignment with EU sanctions, there is broad consensus that Russian influence remains present in more indirect, hybrid, and potentially reactivatable forms.

Russia's most notable attempt at direct political interference occurred in 2016, with the failed government takeover aimed at preventing Montenegro's accession to NATO. The plot, allegedly coordinated by Russia's military intelligence service, is perceived as the defining moment of Russia's transition from soft influence towards covert operations.[66] Though such tactics have not been repeated since, the 2016 incident remains an example of the extent to which Moscow has been willing to go to disrupt Montenegro's Euro-Atlantic integration.

Beyond direct interference, Russian influence in Montenegro has long relied on a hybrid model of engagement. A lot of its influence is channelled through Serbia and its presence in Montenegro. For example, disinformation and Russian media campaigns that exploit societal divisions and promote anti-Western narratives are often tailored in Belgrade and disseminated through Serbian-language tabloids popular in Montenegro.[67] Disinformation campaigns began before Montenegro's NATO accession in 2017 and escalated

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[61] Interview with an academic, conducted on 31 March 2025

[62] Interview with a civil society expert on foreign policy, conducted on 8 April 2025

[63] Interview with a policy analyst, conducted on 19 March 2025

[64] Interview with an academic, conducted on 31 March 2025

[65] Interview with a state official, conducted on 19 March 2025

[66] Interview with a representative of the Delegation of the EU to Montenegro, conducted on 19 March 2025

[67] Interview with a civil society expert on foreign policy, conducted on 8 April 2025

during critical political moments. Through coordinated content dissemination by local and foreign media, Russia portrayed itself as militarily dominant and NATO as a threat to national sovereignty and security, with the aim to obstruct Montenegro's Western integration.[68]

Russia's most effective tool in Montenegro is indirect influence through proxies, particularly the Serbian government and the Serbian Orthodox Church which is identified as a major channel for pro-Kremlin influence.[69] This view was confirmed in focus groups, where citizens and experts described Russian and Serbian influence as "inseparable." "They share a common ideology – that is why Serbia has not imposed sanctions on Russia. This influence is visible every day through political structures in Montenegro."[70]

The SOC, in particular, is seen as a central channel for Russian soft power. Through its close ties with the Russian Orthodox Church and alignment with pro-Russian narratives, the SOC serves for ideological messaging that reinforces anti-Western, ethnonationalist sentiments. Russian influence thrives on "narratives of shared Slavic identity and Orthodox brotherhood," which are instrumentalised to undermine civic cohesion and present the EU and NATO as threats.[71]

From the public's perspective, Russian influence is viewed with ambivalence. In focus groups, some citizens acknowledge that the war in Ukraine and the economic costs of sanctions have reduced Russia's capacity to act, with one noting that "their focus now is on Ukraine and Georgia."[72] Therefore, some perceive Russia as an overestimated threat in Montenegro – that "it is represented as much greater than it actually is."[73] At the same time, even limited Russian activity can have a disproportionately large impact, especially in a small country like Montenegro. Some experts confirm this concern, pointing out that any instability in the Western Balkan region plays to Russia's advantage by undermining democratic consolidation and diverting attention from its actions in Ukraine and elsewhere.[74]

On the other hand, a pro-Russian sentiment is evident in public opinion, revealing a latent influence that could be reactivated if geopolitical conditions shift.[75] It is widely perceived that public sentiment toward Russia is nostalgically favourable in some segments of society due to historical ties.[76] The fact that approximately 15 % of Montenegrin voters supported a clearly pro-Russian political option is a reminder that this influence cannot be dismissed.

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[68] Interview with a state official from the Ministry of European Affairs, conducted on 19 March 2025

[69] Interview with a civil society representative, conducted on 27 December 2024

[70] Data from the focus group with citizens, conducted in Podgorica on 18 March 2025

[71] Interview with a state official, conducted on 24 December 2024

[72] Data from the focus group with citizens, conducted in Podgorica on 18 March 2025

[73] Data from the focus group with experts, conducted in Podgorica on 18 March 2025

[74] Data from the focus group with experts, conducted in Podgorica on 18 March 2025

[75] Interview with a civil society expert on foreign policy, conducted on 8 April 2025

[76] Interview with a representative of the Montenegrin Ministry of European Affairs, conducted on 19 March 2025

Finally, the persistence of formal ties between Montenegro's former ruling party and Russia is noted as a lingering institutional link. The Democratic Party of Socialists (DPS) signed a memorandum of cooperation with United Russia, which, although never officially terminated, has since lost practical significance. Nonetheless, it reflects the complex historical entanglements between Montenegro's political elite and Moscow, even as the country officially reorients toward the West.[77]

In summary, Russian political influence in Montenegro today is less visible but no less potent. Moscow continues to exploit Montenegro's vulnerabilities through hybrid tactics – disinformation, media manipulation, religious ties, and embedded political proxies. Experts agree that while Russia is currently preoccupied with Ukraine and its global confrontation with the West, it remains invested in fostering regional instability in the Balkans. For Russia, Montenegro is not a primary theatre, but it remains a useful pressure point – a small, strategically positioned country where even limited disruption can cause divisions and instabilities.

Türkiye is described as a more nuanced, pragmatic actor, engaging mostly through business (which is elaborated in the section on socio-economic threats) and cultural diplomacy. While experts acknowledge Turkish soft power, they do not equate it with destabilising political interference. However, this influence raises questions about long-term strategic objectives, economic presence, and the potential for political leverage. Concerns persist about alleged money laundering, grey zone investments, and demographic shifts due to immigration, but Türkiye is largely viewed as acting within the bounds of Montenegro's sovereignty and EU integration process.

Türkiye's growing presence in Montenegro is described as conventional in its use of soft power. It operates through cultural diplomacy, religious cooperation with Islamic communities, and economic investment. While not overtly political, these activities are seen to have a cumulative political impact.[78]

Unlike Russia or Serbia, Türkiye carefully avoids involvement in identity-based political conflicts. Türkiye maintains good bilateral relations with Montenegro and tactically balances its support across different communities, including both Muslim and Orthodox populations.[79] This balanced and non-confrontational approach has allowed Türkiye to build influence without being perceived as a divisive or interfering actor.

Nevertheless, concerns remain about Türkiye's long-term political intentions. Some interviewees pointed to the opaque nature of Turkish investments and the lack of critical media scrutiny surrounding Türkiye's role in Montenegro. These factors contribute to a perception that Türkiye might be cultivating political leverage through indirect means, such as deepening economic ties and cultural influence through TIKA.[80]

Türkiye's influence, once perceived primarily in terms of its positive role in preventing Islamic radicalisation, has evolved with increased economic and cultural penetration. Although it does not currently obstruct

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[77] Data from the focus group with experts, conducted in Podgorica on 18 March 2025

[78] Interview with an academic, conducted on 31 March 2025

[79] Ibid.

[80] Data from the focus group with citizens, conducted in Podgorica on 18 March 2025

Montenegro's EU aspirations, if Ankara chose to exert pressure, it could do so effectively due to its growing presence.[81]

Türkiye is identified as the most visibly growing foreign actor in Montenegro today, noting significant activity in business and immigration. While Türkiye's presence is not viewed as overtly political, it is acknowledged that Turkish have shown interest in Montenegro joining the EU to facilitate easier access to European markets. Though not currently viewed as a threat to political stability or EU integration, such interests indicate the potential for future political relevance.[82]

Montenegro's political environment, characterised by its Euro-Atlantic aspirations and internal identity dynamics, makes it particularly sensitive to foreign influence. Türkiye's strategic avoidance of overt political alignment or interference has so far enabled it to maintain a largely favourable position. However, interviewees caution that the expanding footprint, especially if unregulated or lacking transparency, could eventually shift this perception and introduce new political complexities.

Perceptions of Turkish influence in Montenegro's political domain are marked by a careful balancing act on the part of Ankara. While Türkiye is not currently seen as a direct political threat, the combination of growing economic entrenchment, demographic shifts, and soft power expansion raises concerns about potential future leverage. Türkiye's strategic non-interference has shielded it from the kind of criticism directed at other foreign actors, but the long-term political implications of its presence remain uncertain.

China's political influence in Montenegro is still relatively limited but gradually expanding through a range of soft power initiatives. These efforts primarily include training and exchange programmes targeting civil servants, journalists, and other professionals, but also the agreement on economic and technical cooperation between China and Montenegro was signed, enabling multimillion-dollar donations. State-sponsored visits to China are designed to present a carefully curated image of the country as efficient, modern, and harmonious. These exchanges aim to shape perceptions of China among Montenegro's current and future decision-makers, contributing to a growing network of individuals with favourable views of Chinese governance, culture, and economic development. In addition, two Confucius Institutes – one at a state university and another at a private university – promote the Chinese language and culture, while Montenegrin and Chinese higher education institutions have signed multiple cooperation memorandum (RTCG, 2024).

Experts in Montenegro observe that China's soft power strategy is subtle, especially when compared to the more aggressive influence tactics employed by Russia. Chinese media narratives are present in the Montenegrin information space but are currently far less confrontational or anti-Western.[83] Nonetheless, it should be noted that a formal media cooperation began in 2019 with the signing of an agreement between Montenegro's Public Broadcasting Service (RTCG) and the International Chinese Television Corporation. Later, RTCG expanded collaboration with China Media Group, which encompasses China's most influential media

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[81] Interview with a civil society expert on foreign policy, conducted on 8 April 2025

[82] Interview with a representative of the Montenegrin Ministry of European Affairs, conducted on 19 March 2025

[83] Interview with a state official, conducted on 24 December 2024

outlets. According to Reporters without Borders, China is recognised as "the world's largest prison for journalists", (Reporters without Borders, n.d.) but that did not prevent dozens of Montenegrin journalists from visiting China on study trips in recent years.

The overall impact of China's soft power is still seen as modest. Some focus group participants noted that journalistic and educational exchanges sponsored by China have not yet led to noticeable changes in media coverage or public discourse about the country, except for several positive reports in the domestic media on the beauty of architecture and technological advancements in China that were published following the visits (RTCG, 2019).[84] However, others expressed concern that these exchanges may be laying the groundwork for deeper political influence over time. The promotion of positive perceptions of China may subtly shape attitudes that become more influential if individuals involved in these programmes later assume key positions in government, media, or public institutions.

While China's current role in Montenegro may not appear overtly malign, any significant expansion of Chinese influence in the Western Balkans could pose a strategic challenge to Western interests, given the size and interconnectedness of the region.[85]

6.5.2. Opportunities and resilience factors

Despite the external pressures, Montenegro retains several opportunities to resist foreign influence and consolidate its European trajectory. Its resilience lies in its institutional partnerships, particularly with NATO and the EU, as well as the potential for stronger, inclusive internal dialogue and rule of law reforms that can close the space for external manipulation.[86]

One of Montenegro's greatest assets is the enduring public support for EU membership. Across nearly all interviews, experts highlighted that between 75 % and 87 % of Montenegrins consistently support EU accession, which is a rare consensus that cuts across political and identity lines. Even pro-Serbian and populist parties, while often critical of the West, avoid outright opposition to the EU due to the political costs involved.[87] This widespread support provides a strategic anchor for reform, democratic consolidation, and a unifying vision for the country's future.

However, many experts warn of a drift toward "form over substance." They note that laws are sometimes passed rapidly to meet benchmarks such as the Interim Benchmark Assessment Report (IBAR), without public consultation or parliamentary scrutiny. This erodes the EU's credibility and enables local elites to game the system without committing to meaningful reform.[88]

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[84] Data from the focus group with citizens, conducted in Podgorica on 18 March 2025

[85] Interview with a state official, conducted on 24 December 2024

[86] Interview with an academic/expert on foreign policy, conducted on 20 March 2025

[87] Ibid.

[88] Interviews with state officials, conducted on 19 March 2025

Civil society remains a key pillar of democratic resilience. Despite its limited influence on policymaking, it plays a crucial watchdog role, especially in the fight against corruption and democratic backsliding.[89] Civil society organisations have raised awareness around foreign influence operations and pushed back against authoritarian trends. While parts of the state institutions interviewed during the field work underlined that civil sector has become politicised or less constructive in recent years, the broader civil society landscape continues to be a corrective force.[90]

Montenegro also benefits from strong legal frameworks, particularly due to its alignment with the EU acquis. Although the main challenge lies in implementation rather than legislation, this alignment creates a foundation for deeper reforms if institutional accountability and enforcement mechanisms are strengthened.[91] The judiciary, however, remains a critical weak point. Political interference and a lack of prosecutorial independence undermine public trust and democratic functionality, making judicial reform and anti-corruption efforts urgent priorities.

Montenegro's democratic development is vulnerable to internal fragmentation. The current coalition government lacks ideological coherence and is more focused on maintaining power than pursuing a unified policy agenda. This creates openings for foreign influence, particularly through identity politics, economic populism, and external media narratives.[92] Corruption, nepotism, and weak implementation of EU-aligned laws further diminish institutional resilience.

Nonetheless, experts express cautious optimism. NATO membership and historical experience with multiethnic coexistence serve as stabilising factors.[93] Montenegro's civic identity, enshrined in its constitution, remains an untapped source of democratic strength. Reinvigorating civic values through education, political party reform, and a focus on shared citizenship could reduce the impact of divisive identity politics.

The EU plays a vital role in reinforcing Montenegro's resilience. Through financial support, legislative guidance, and mediation during political crises, the EU remains the most credible external partner.[94] However, interviewees stress the need for a more consistent and principled EU strategy that avoids 'stabilitocracy' – prioritising superficial political stability over meaningful democratic reform.[95]

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[89] Interviews with a representative of the Delegation of the EU to Montenegro (19 March 2025) and two state officials (19 March 2025)

[90] Interview with a state official, conducted on 19 March 2025

[91] Interview with a policy analyst, conducted on 19 March 2025

[92] Interview with an academic (31 March 2025) and a civil society expert on foreign policy (8 April 2025)

[93] Ibid.

[94] Interview with a representative of the Delegation of the EU to Montenegro (19 March 2025) and with an academic/expert on foreign policy (20 March 2025)

[95] Interview with an academic, conducted on 31 March 2025

Montenegro is a fragile but functional democracy. While external threats persist, its strong public support for EU integration, active civil society, and potential for institutional reform provide a solid foundation for increasing resilience. Strategic EU engagement, genuine rule of law reforms, and civic renewal are essential to safeguarding Montenegro's democratic future.

6.6. Policy areas

According to a wide range of stakeholders – from civil society experts and political analysts to institutional representatives and citizens – the country remains particularly susceptible to foreign malign influence through economic pressure, disinformation, institutional corruption, and identity-based manipulation. While the EU is recognised as Montenegro's most important partner, the overall consensus is that the Union's engagement has been inconsistent, bureaucratic, and insufficiently strategic. To bolster Montenegro's resilience, stakeholders identify several key policy areas where the EU's support is urgently needed.

1. Strengthening the rule of law and judicial reform

Respondents emphasised that rule of law and judicial reform are the foundations of democratic resilience. Montenegro continues to suffer from widespread corruption, politically influenced judicial decisions, and a lack of transparency in the implementation of existing laws. Although legal frameworks often appear aligned with EU standards on paper, actual enforcement remains weak.

Experts called for more robust and consistent EU pressure to drive meaningful reforms. They argued that the EU has too often accepted superficial progress, such as hastily passed legislation that lacks substance, and failed to monitor implementation rigorously. Respondents called on the EU to ensure real accountability mechanisms, not just formal compliance, and to adopt a more hands-on approach in supporting institutional reform through both conditionality and technical assistance.

2. Support for independent media, civil society, and democratic culture

The informational and political dimensions of foreign influence, especially from Serbia and Russia, were seen as serious threats. These actors exploit Montenegro's fragmented identity, weakened institutions, and unregulated media space to disseminate disinformation and support political proxies. Stakeholders identified civil society and independent media as critical frontlines in countering these narratives.

However, support for these sectors is currently perceived as inadequate. Respondents urged the EU to increase both financial and institutional support for independent media, fact-checking initiatives, and civic education. Furthermore, they emphasised the need to include Western Balkan countries—Montenegro in particular—within EU-wide digital policy mechanisms, such as the Code of Practice on Disinformation and the Digital Services Act (DSA).[96] Participation in these mechanisms would enable more effective regulation of harmful content and foreign propaganda in Montenegro's digital sphere.

3. Reform of political parties and democratic participation

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[96] Interview with a civil society expert on foreign policy, conducted on 8 April 2025

Beyond civil society, some experts noted that political parties themselves require support and reform. Unlike civil society and institutions, which are often the focus of EU programmes, parties remain underdeveloped, clientelist, and ideologically incoherent. Respondents stressed that the EU must engage more directly with political parties to strengthen internal democracy, transparency in financing, and capacity for policy development.

Without stronger, reformed political parties, many fear that democracy in Montenegro will remain shallow, overly personalised, and vulnerable to external manipulation. Therefore, the EU's engagement should include targeted training, capacity-building, and conditional support for parties, particularly in areas such as campaign finance regulation and inclusive governance.

4. Economic oversight and investment screening

Montenegro's economic vulnerability, particularly its overreliance on tourism and foreign investment, was viewed as a significant vector of foreign influence. Russia, China, Türkiye, and the UAE were all mentioned as actors whose economic involvement has been non-transparent, politically conditioned, or misaligned with Montenegro's democratic goals.

Respondents proposed a regional investment screening mechanism, coordinated or supported by the EU, to prevent strategic sectors from falling under undue foreign influence. They also advocated for stricter procurement transparency and rule-of-law criteria for all investment deals, whether foreign or domestic.

In sectors such as energy, infrastructure, and real estate, the EU's role should go beyond funding and include regulatory oversight, support for good governance, and alignment with environmental and fiscal standards. If the EU fails to fill these gaps, interviewees warned, Montenegro may continue to engage with actors who undermine its European trajectory.

5. Public administration reform and professionalisation

A recurring theme was the need to professionalise Montenegro's public administration. Participants noted that partisan appointments and politically driven decision-making continue to undermine institutional efficiency and trust. The merit-based recruitment of civil servants, better evaluation mechanisms, and digitalisation of administrative processes were identified as priorities.

Here, the EU's role would be to offer both technical assistance and stronger conditionality, linking support to measurable improvements in transparency, efficiency, and service delivery. Some respondents stressed that existing EU assistance is underutilised due to Montenegro's limited implementation capacity. Hence, improving institutional absorption capacity is as important as increasing the volume of support.

6. Accession process and institutional credibility

Frustration over the slow pace of EU accession was widespread. Many respondents felt that the EU has failed to provide clear, consistent signals of commitment, leading to growing scepticism and space for third-country influence. Some suggested fast-tracking Montenegro's accession or at least offering partial integration into EU structures such as the Single Market and select funding mechanisms.

Others warned that credibility must be maintained, and that any lowering of standards would backfire in the long term by weakening reform momentum. Most agreed that the EU must adopt a merit-based but proactive approach by rewarding genuine reforms and ensuring that conditionality is applied fairly and consistently.

7. Visibility, communication, and strategic presence

Finally, many participants expressed concern over the EU's limited visibility in Montenegro compared to other foreign actors. While Russia, Serbia, China, and Türkiye often appear more present and engaged, the EU is perceived as bureaucratic and distant.

"The EU's response to foreign influence is insufficient. Institutions like StratCom are too bureaucratic and slow, and the EU lacks tailored, strategic tools to counteract foreign malign influence in the region. As long as there is no open conflict, the EU tends to turn a blind eye to deeper structural issues in candidate countries. Without stronger engagement, more flexible instruments, and regional coordination, foreign actors will continue to exploit these gaps."[97]

Participants recommended increased public diplomacy, including the opening of EU offices, regular high-level visits, and visible investment in public infrastructure projects. Strategic communication should emphasise the tangible benefits of EU integration – not just in abstract values, but in jobs, education, healthcare, and security.

6.7. Conclusion

Montenegro is a fragile but strategically significant democracy that remains highly exposed to external influence across political, socio-economic, and hybrid (primarily cyber) domains. While the country has made important progress in its Euro-Atlantic integration, its resilience remains uneven upon both domestic reform and sustained international support, especially from the EU.

The local perceptions gathered through this research confirm that Serbia and Russia remain the most prominent sources of political interference, operating through religious institutions, media ecosystems, and political parties. China and Türkiye, though less overtly political, are expanding their economic presence in ways that raise questions about long-term strategic implications. The UAE is also identified as an economic player in Montenegro that can become a more serious threat in the future, while no direct military threats are perceived in Montenegro.

Respondents across different sectors highlighted the same set of vulnerabilities: weak rule of law, politicised institutions, dependency on foreign capital, and a fragmented political landscape that is susceptible to manipulation. At the same time, they pointed to clear opportunities: public support for EU membership, NATO security guarantees, and a historically multiethnic society that still retains a civic foundation.

On the other hand, Montenegro remains deeply politically polarised, and Serbia's role is a central factor in this divide. While some parts of society view Serbia as a cultural and historical partner, due to shared

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[97] Interview with an academic, conducted on 31 March 2025

language, religion, and historical ties, many others perceive it as a primary foreign political threat to Montenegro's sovereignty, democratic institutions, and Euro-Atlantic orientation, that often interferes in internal issues. This polarisation is especially visible in competing narratives around national identity, language, and statehood.

What stands out most from the data is the growing disconnect between formal alignment and substantive reform. Many of the country's laws and policies mirror EU standards on paper, but their implementation is undermined by political interference, corruption, and limited institutional capacity. This gap fuels public disillusionment and opens space for third-country influence.

Participants consistently emphasised that EU support is both necessary and expected, but must become more strategic, visible, and responsive. Civil society actors called for greater investment in media literacy, investigative journalism, and watchdog mechanisms. Institutional representatives requested technical assistance, judicial reform, and better coordination across sectors. Citizens voiced frustration with the EU's perceived passivity and stressed the need for more public engagement and tangible benefits of integration.

A recurring theme was the need for the EU to adopt a regional approach to countering foreign influence. Respondents proposed cross-border investment screening, coordinated disinformation defence, and joint programming for democratic capacity-building.

Finally, the data suggests that Montenegro's resilience is not yet secured, but it is within reach. Strengthening that resilience requires not only external support but also internal renewal. The EU cannot substitute for local political will, but it can create the incentives, frameworks, and partnerships needed to empower reforms.

Across all fields – from media freedom and institutional reform to economic governance and public administration – local experts highlighted the need for more robust, strategic, and tailored EU support. The overarching message is clear: Montenegro cannot build resilience against foreign influence without a credible, consistent, and visible European partner. While internal reforms are essential, the EU remains the key external actor capable of providing long-term democratic and economic stability.

6.8. References

6.8.1. List of interviews

Code of interviewee	Affiliation	Place and Date
MNE68	Academic/expert in foreign policy	Podgorica, 20.03.2025
MNE69	Representative of the Montenegrin Ministry of European Affairs	Podgorica, 19.03.2025
MNE70	Professor in economics	Podgorica, 19.03.2025
MNE71	Academic	Online, 31.03.2025

MNE72	Policy analyst	Podgorica, 19.03.2025
MNE73	Civil society expert on foreign policy	Online, 08.04.2025
MNE74	Representative of the Delegation of the EU to Montenegro	Podgorica, 19.03.2025
MNE75	Representative of the Delegation of the EU to Montenegro	Podgorica, 19.03.2025
MNE76	Representative of the Montenegrin Ministry of European Affairs	Podgorica, 20.03.2025
MNE77	Civil society representative	Online, 27.12. 2024
MNE78	Government official	Online, 24.12.2024

6.8.2. Focus Group Discussion

Focus group discussion	Group	Place and date
Focus group discussion with experts	Civil society representative, academics and journalists	Podgorica, 18.03.2025
Focus group discussion with citizens	Miscellaneous	Podgorica, 18.03.2025

6.8.3. References and documents

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European Commission, Enlargement and Eastern Neighbourhood, Montenegro, accessed on 10 May 2025, https://enlargement.ec.europa.eu/enlargement-policy/montenegro_en

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7. NORTH MACEDONIA

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7.1. Introduction

This country report examines how local actors in North Macedonia perceive security, socioeconomic and political threats to the country and the role and influence of external state actors. It places particular emphasis on identifying areas where local stakeholders believe the EU and other Western partners could play a more effective role in countering malign influence, building resilience and advancing North Macedonia's EU integration.

The analysis builds on previous REUNIR research, including the mapping of existing surveys on how foreign influence is perceived across the Eastern Neighbourhood and Western Balkans (Pollozhani et al. 2024). This existing knowledge base is now enriched with qualitative fieldwork conducted through interviews and focus groups involving representatives of civil society, public institutions, academia, the private sector, and the general public. Consistent with the REUNIR framework, external influence is analysed across three thematic dimensions—military, socio-economic, and political—each evaluated in terms of perceived threats, opportunities, and sources of resilience.

REUNIR expert assessments of foreign influence identified domestic vulnerabilities and external threats to North Macedonia's security, democracy and economy. These analyses focused on the influence of Russia, China and, to an extent, Türkiye. They concluded that the likelihood of a direct military threat to North Macedonia's sovereignty is low. However, in this domain, cyberattacks represent a growing security concern, such as the one targeting the Ministry of Defence and armed forces in April 2024, ahead of the parliamentary elections (Lawrence, T. et al. 2025, p. 47). In the political domain, Russia's covert operations and disinformation campaigns aim at hindering the country's integration into the EU, and formerly also into NATO. Pro-Russian and pro-Chinese propaganda is disseminated through local media and Serbian outlets, while Russia also exerts influence through the Macedonian Orthodox Church, aligning with conservative, anti-Western values. The impact of these efforts, however, remains limited due to the government's official pro-EU stance and limited parliamentary support for pro-Russian parties (Burmester, I. at al. 2025, pp. 44-45). In the socioeconomic domain, Russia leverages energy dependencies, China influences critical infrastructure projects, particularly through long-term contracts associated with corruption and Türkiye is present in strategic sectors (Akhvlediani, T. et al. 2025, pp. 18-20).

Previous research on public perceptions in North Macedonia reveal a widespread sense of disillusionment and concern about the country's direction. According to the IRI's 2024 Western Balkans Poll, 78 % of respondents believe North Macedonia is heading in the wrong direction, with the cost of living crisis (31 %) and corruption (22 %) identified as the top problems (IRI 2024). A significant portion of the population is also worried about brain drain, which 27 % of respondents listed as a major issue. While half of the population is at least somewhat satisfied with the current security situation, a deeper sense of social fragmentation is evident: 63 % view nationalism as a serious problem, and a large majority blame political leaders and parties

for stoking tensions (RCC 2023). Moreover, insecurity and mistrust toward minority groups persist across multiple societal dimensions, highlighting a fundamental lack of internal cohesion and social resilience.

When it comes to foreign policy and security alignments, the data suggest complex and often ambivalent attitudes. A majority of citizens (68 %) say they would vote for EU membership, but only 34% believe the EU is serious about offering it—fuelling frustration and growing Euroscepticism (IRI 2024). While 31 % support a strictly pro-EU and Western foreign policy, another 23 % believe the country should balance relations between the West and Russia, with just 4 % advocating for a purely pro-Russian orientation. Ethnic divides further shape these perceptions: 51 % of ethnic Albanians favour a solely pro-Western stance, compared to only 23 % of ethnic Macedonians. Despite NATO membership, citizens place more faith in the EU and its Member States as security providers than in the Alliance itself, while Russia was still viewed more favourably than the US or neighbouring countries as a security partner as recently as 2021 (BiEPAG 2021).

Perceptions of allies and threats further illustrate the nuances in North Macedonia's geopolitical identity. Serbia emerges as the most important ally for 34 % of respondents, ahead of any EU or Western state—a view driven primarily by ethnic Macedonians, 88 % of whom hold favourable views of Serbia (IRI 2024). In contrast, ethnic Albanians express greater warmth toward Albania (80 %) and Kosovo (77 %). Meanwhile, countries like Germany and Türkiye maintain broadly positive reputations across ethnic lines. At the same time, Bulgaria is viewed by 23 % of respondents as the most important threat to the country—a perception linked to its role in blocking North Macedonia's EU accession process. Interestingly, 71 % of respondents are unaware of any major Chinese investments in their country, suggesting that Beijing's influence is still more symbolic than tangible in the public imagination (IRI 2024). These mixed attitudes underscore a sense of being geopolitically peripheral, caught between competing regional and global powers, yet uncertain of where meaningful support or alignment truly lies.

Surveys conducted in 2025 continue to highlight the complex and shifting landscape of public opinion in North Macedonia regarding foreign relations and EU integration. The European Union remains the country's most preferred economic partner (33 %) and donor (40 %), followed by the United States (22 % and 17 % respectively), underscoring the primacy of the EU in citizens' strategic outlooks (IDSCS 2025). However, optimism about EU accession is waning. Only 33 % of respondents believe that the EU will admit Western Balkan countries by 2030, down from 50 % in 2023 (IDSCS 2025). Despite this decline in confidence, 35 % still identify EU integration as the most important foreign policy priority, ahead of regional cooperation (26 %). Judicial reform is seen by every third respondent as the key area needing improvement to advance accession. Trust in the EU remains above 50 %, with 54 % of respondents expressing confidence in the Union, although 42 % remain sceptical (Standard Eurobarometer No. 103 2025). Attitudes remain divided along ethnic and generational lines: 62 % of Albanians favour a Western orientation compared to just 33 % of Macedonians, while youth (18–24) are increasingly open to China (19 %) and older generations (65+) show more sympathy for Russia (15 %) (IDSCS 2025). Interestingly, while the US is still seen as the most influential actor in the country (41 %), this figure has declined from 60 % the previous year, as the EU's perceived influence has nearly doubled—from 19 % to 37 %—signalling a possible rebalancing of international perceptions (IDSCS 2025).

The following text begins with a brief overview of the research methodology and the national context in which the study was conducted. It then presents key findings from the fieldwork, focusing on local perceptions of security, socio-economic, and political threats facing North Macedonia. In the final sections, particular attention is given to priority policy areas, offering targeted recommendations for both domestic and EU decision-makers before concluding the report.

7.1.1. Methodology

This report relies on data gathered through desktop research and field work in North Macedonia, as part of the wider efforts of the REUNIR consortium to understand key political, military, and socio-economic threats in the Western Balkans and Eastern Neighbourhood countries. The methodology was designed to explore how stakeholders and citizens of North Macedonia perceive the role and influence of key external actors, including the EU, Russia, China, Türkiye, and others, and to identify both vulnerabilities and opportunities for building resilience in the country.

The research was conducted in three phases. The first phase involved preparatory work, starting with a comprehensive mapping of existing surveys and academic studies on foreign influence perceptions (Pollozhani et al. 2024). This review helped identify priority policy areas and shaped the development of a common methodological framework. Researchers from REUNIR consortium also co-designed a detailed interview questionnaire to ensure cross-country comparability. The second phase focused on stakeholder selection for interviews and organising focus group discussions in each of the nine countries. The selection process aimed for diversity and representativeness, with at least three interviewees per thematic area—security, socio-economic, and political—ensuring gender balance, ideological diversity, and inclusion of marginalised groups. Additionally, two focus groups were held in each country: one with citizens and another with professionals and experts, balancing gender and perspectives.

The third and final phase consisted of field work. Two focus groups (FG) and most of the interviews took place during the study visit to Skopje on 26-27 March 2025. For several experts that were not available in the said period, online interviews were organised. In North Macedonia the research team spoke to 34 stakeholders in total. The team interviewed 18 stakeholders across all three domains, while two focus groups gathered a total of 16 participants (seven experts, nine citizens). Of these 34 interlocutors, there were 11 women and 23 men. Stakeholder categories include journalists, citizens, representatives of state institutions, EU Delegation to North Macedonia, civil society, academia and the private sector (chamber of commerce) (for a more detailed disaggregation see Table 1 below). The conversations provided insights into how different segments of society understand key challenges in the country, especially threats originating from abroad. The questionnaire also aimed to explore how interlocutors assess the EU's role against that background, and how national resilience can be enhanced.

All research activities were conducted in accordance with REUNIR's ethical guidelines. Informed consent was obtained from all participants, who were advised of their right to anonymity and the voluntary nature of participation. All citations in the text have been anonymised.

Table 1. Interlocutors by institutional category and by gender

Country: North Macedonia	Interlocutors	Number
	Academia	6
	Civil Society	9
	State Institutions	3
	Private businesses/chambers of commerce	1
	Political Parties	/
	Other (specify)	15
	Women	11
	Men	23
Total		34

This Report complements the expert threat and resilience assessments conducted for each of the nine countries of the Western Balkans and Eastern Neighbourhood in the three domains: military (Lawrence, T. et al. 2025), socio-economic (Akhvlediani, T. et al. 2025) and political (Burmester, I. at al. 2025).

7.2. Perceptions on external actors in North Macedonia

7.2.1. Context

North Macedonia, an ex-Yugoslav state, has been an EU candidate country since 2005. Its accession process, however, remains hindered by bilateral disputes with neighbouring EU Member States, particularly regarding identity issues. Greece insisted that the country change its name, while Bulgaria disputes the interpretation of the Macedonian language and history. Both of these demands necessitate constitutional amendments, with the first being conceded in 2019, leading to the change of the name of the country to North Macedonia. The agreement with Greece enabled North Macedonia to join NATO in 2020. The Serbian Orthodox Church also disputed the legitimacy of the Macedonian Orthodox Church until 2022. EU accession negotiations were only formally opened in the summer of 2022, after the EU was prompted by Russia's aggression against Ukraine. However, negotiating chapters cannot be opened until the dispute with Bulgaria is resolved.

The country has a multi-ethnic population. According to the 2021 census, out of 1.8 million residents, 58.44 % identify as Macedonians, 24.3 % as Albanians, and 3.86 % as Turks, with other minorities also present (Republic Statistical Office of North Macedonia 2022). The Ohrid Framework Agreement of 2001 laid the foundation for integrating the Albanian community into government structures at both the national and local levels.

In 2017, following parliamentary elections and mass protests in 2015, the country underwent a regime change. The European Commission identified elements of state capture under the governance of VMRO-DPMNE and provided support for reform efforts. However, momentum for these reforms stalled after the EU failed to reach a unanimous decision to begin accession negotiations, and the SDSM led government failed to deliver on reforms, challenged also by the COVID pandemic and the rising prices. In 2024, the conservative VMRO-DPMNE party was elected back into power. The new Government quickly re-opened nationalist grievances by disputing the Prespa Agreement (not using the country's new name) and trying to re-negotiate the compromise caused by Bulgarian veto as it oposes the required constitutional change (Trpkovski, 2024).

The country was shaken by a tragedy in the spring of 2025, when a fire at a nightclub in Kočani claimed 59 lives and injured more than 150 people, most of them young. The blaze was caused by pyrotechnic devices used during a concert. The venue lacked adequate fire safety measures, which should have been regularly inspected by the authorities (Spasovska 2025). In the citizen focus group held in Skopje only ten days later, this example was referenced multiple times as a symbol of governance failure and a test case for the new government's approach to corruption. Participants described the Kočani incident as a turning point that exposed longstanding institutional dysfunction, corruption, and regulatory neglect. Several noted that the handling of the disaster was emblematic of a deeper structural problem: a system that only responds when catastrophe strikes, while the government failed to demonstrate systemic accountability. For many, Kočani symbolised both the persistence of deep-rooted corruption and the inadequacy of the new government's response, raising doubts about its sincerity, competence, and capacity to pursue real reform.

7.3. Military threats, opportunities and resilience

North Macedonia does not currently face an imminent direct military threat. This consensus emerges across the citizen focus group, expert focus group, and expert interviews. As a member of NATO, the country enjoys a significant security guarantee, with Article 5 serving as a strong deterrent against external aggression (expert FG). However, membership in the alliance also introduces complex risks, including the possibility of indirect involvement in regional or global conflicts due to alliance obligations (citizen FG, expert FG).

Among citizens, NATO membership is largely seen as a shield against traditional military threats, but concerns remain about potential spillovers from regional instability—especially in regard to Serbia–Kosovo relations, and Bosnia and Herzegovina. These concerns do not focus on invasion but on refugee flows, political disruption, and the broader consequences of regional unrest (citizen FG in Skopje 26/03/2025). Citizens also expressed apprehension that political polarisation, disinformation, and weak leadership could exacerbate internal instability, particularly if external actors such as Russia exploit these vulnerabilities. Expert discussions reinforce this perspective. While Russia is not seen as a direct military aggressor, it remains symbolically threatening. Participants referenced historical intimidation, such as threats made by Russian diplomats during NATO accession debates and pointed out that North Macedonia has twice appeared on Russia's list of "unfriendly nations" (expert FG in Skopje 26/03/2025).

Global conflicts—most notably the war in Ukraine—have significant indirect repercussions for North Macedonia's security. Experts warn that broader destabilisation in Eastern Europe, especially scenarios involving territorial revisions or the erosion of international law, could embolden nationalist actors and

undermine the fragile interethnic balance within the country. As a NATO member, North Macedonia also faces the risk of being drawn into collective responses to crises, which may strain public support for Euro-Atlantic integration. Additionally, global conflicts provide fertile ground for disinformation campaigns and cyber operations, which exploit domestic polarisation and amplify distrust in institutions, further weakening the country's resilience to both external and internal threats.

Cybersecurity was highlighted by experts in both the focus group discussions and during the interviews as a critical yet under-addressed concern. Experts cited a 2019 IT system crash during elections and more recent waves of anonymous bomb threats—some traced to actors in Iran—as evidence of the country's vulnerability to hybrid operations. These incidents destabilise public trust, create confusion, and potentially delegitimise democratic institutions. Despite these vulnerabilities, efforts to improve digital resilience and media literacy are still fragmented and insufficiently regulated (Interview with civil society expert MK03, 27/03/2025). NATO provided timely support during critical moments, such as hybrid attacks and fake bomb threats. In early 2023, NATO experts, led by James Appathurai, visited North Macedonia to coordinate responses and create a programme to strengthen the country's resilience against future threats.

Domestic political fragility further complicates the picture. Experts noted that inter-ethnic relations remain a potential flashpoint, particularly among the Albanian non-majority community, which is sensitive to developments in Kosovo and shifting Western (foremost the US) policies towards the country. The legacy of the 2001 Ohrid Agreement continues to shape the country's internal cohesion, and any mismanagement of this delicate balance could create conditions ripe for external exploitation. Experts warned that regional conflicts—especially if they involve territorial changes—could trigger a "domino effect" on multi-ethnic states like North Macedonia.

The geopolitical environment adds another layer of complexity. Interviewees emphasised the actions of a coordinated group of states—Russia, Iran, China, Belarus, North Korea—that seek to erode the rule-based international order. For small, sovereignty-dependent countries like North Macedonia, this erosion presents a structural long-term threat. "We see by the case, unfortunate case of Ukraine, that might cannot be right in the 21st century. If that is taken for granted, if states can act regardless of the rules of the international order and international norms, everyone is in danger" (interview with military affairs expert, MK08, 31/03/2025).

At the same time, the militarisation of Europe, especially via emerging EU defence initiatives from which candidate countries are excluded, introduces strategic ambiguity. Experts voiced concern that such processes could marginalise North Macedonia, undermining its role in regional security and defence planning.

Türkiye emerges as North Macedonia's most active military partner in operational terms, through joint exercises and defence aid, followed by the US, Norway, and the UK in more strategic and training capacities (Interview MK03, 27/03/2025). However, new developments—such as a proposed Türkiye-Albania defence pact—may unsettle regional dynamics and create tension with Greece, another key NATO member, given historical sensitivities and North Macedonia's close ties with Türkiye.

In the focus group and interviews, experts voiced strong concerns about instability in U.S. politics affecting NATO cohesion, noting a decline in confidence in the U.S. as a reliable ally. This raised fears that weakening

American leadership could undermine NATO's unity and destabilise the Western Balkans more broadly. As one expert noted:

 "We as the whole world, probably you're waking up in the morning and you do not know what news you will face and what kind of wind will blow from Washington. So, this aspect actually is also shaping the narrative and is having an influence here in the country. When we were thinking about democracy, security, stability, EU yes, but mostly USA, they have always been a pillar. And now that pillar is shaken, to put it mildly." (expert FG in Skopje 26/03/2025)

Finally, public perception of NATO remains mixed. While political elites and Western-oriented actors view membership favourably, broader segments of society—especially those influenced by Serbian media narratives and residual resentment from the 1999 NATO bombing of Yugoslavia—remain sceptical (expert FG in Skopje 26/03/2025). The latest public survey reinforces this pattern: 62 % of Albanian respondents express a clear pro-Western orientation, while ethnic Macedonians appear more divided—only 33 % favour the West, and 46 % adopt a neutral stance (IDSCS 2025). Similarly, ethnic Albanians see the benefits of the country's membership in NATO (92 % to 61 %) and the role of this alliance in the world (90 % to 55 %) more positively than ethnic Macedonians (IRI 2024). This ambivalence could weaken domestic cohesion around foreign policy alignment and defence priorities, particularly in the face of growing political polarisation and the rise of anti-NATO, pro-Russian political forces such as the Levica party.

In conclusion, while North Macedonia is insulated from direct military aggression due to NATO membership, it remains exposed to a range of indirect and hybrid threats. These include regional instability, ethnic tensions, cyberattacks, political polarisation, and foreign influence operations. Addressing these threats requires not only continued NATO support but also stronger internal governance, enhanced cyber resilience, and a more inclusive strategic role within emerging European defence structures.

7.4. Socio-economic threats, opportunities and resilience

North Macedonia's internal stability and EU integration trajectory are increasingly imperilled not by conventional military threats but by deep-seated socioeconomic vulnerabilities. According to recent public opinion surveys, the cost of living crisis (31 %) and corruption (22 %) rank as the most urgent issues for citizens (IRI 2024), as well as brain drain (RCC 2023). These concerns are echoed and expanded in qualitative data collected through focus groups and expert interviews, which outline a structurally fragile economic model plagued by stagnation, poor governance, labour shortages, and growing disillusionment among youth.

Participants in the citizen focus group consistently highlighted youth emigration as a top concern. The youth are leaving in search of better opportunities abroad, driven by the lack of investment, limited job prospects, and dissatisfaction with the political and socio-economic conditions at home. This exodus poses an acute long-term risk, undermining the domestic workforce and diminishing North Macedonia's developmental potential.

Expert FG participants warned that the state is beginning to adopt a policy of importing labour from Southeast Asia to compensate for the shortage. However, experts cautioned that this could trigger a potential

for racism and xenophobia in North Macedonian society, and without proactive community engagement, the arrival of foreign workers could trigger social tensions.

Expert interviews further reinforced this concern. A private sector expert from North Macedonia, described the labour crisis as the most pressing threat to North Macedonia's private sector. Efforts to recruit workers from countries like Nepal, Bangladesh, and India have largely failed due to language barriers and onward migration to the EU. Without urgent reforms in vocational training and education, experts fear the country will lack the capacity to sustain even low-tech industrial sectors (Interview MK06, 26/03/2025).

During the focus groups, citizens warned of a critical skills and education mismatch. Although the country boasts a high number of individuals with formal qualifications (e.g. master's degrees), their actual workplace readiness is viewed as poor. The gap between educational credentials and market needs is blamed for widespread underemployment and low competitiveness in both domestic and global markets. Expert interviews corroborated this, noting that without aligning education and training systems with labour market demands, North Macedonia will continue to struggle economically and fall short of the structural transformation required for EU accession.

Across citizen and expert inputs, corruption was repeatedly identified as a core socioeconomic threat. Citizen FG participants cited systemic corruption across all levels of government and public procurement, which not only erodes public trust but distorts market conditions. The economic model was described by citizens as favouring foreign investors at the expense of local businesses, exacerbating wealth inequality and public disillusionment.

The informal economy is described in expert interviews as roughly equal in size to the formal economy, illustrating the depth of institutional weakness. This undercuts the state's ability to generate revenue and finance public services, especially in education, healthcare, and anti-corruption initiatives, which are all crucial for long-term resilience.

Both citizens and experts pointed to a chronic lack of investment in key sectors, particularly energy and transport infrastructure. Citizens linked this to weak governance capacity, corruption and poor project implementation. Experts stressed that without modernisation of these sectors, the country risks becoming a logistical and economic backwater, unable to integrate meaningfully into the EU Single Market.

Citizen FG participants noted that political instability, including stalled EU negotiations, directly undermines economic growth. The failure to deliver on reform promises contributes to disillusionment and apathy among citizens, reducing the legitimacy of public institutions. Expert interviews described the result as a fragile state capacity, unable to absorb EU funds or implement coherent development strategies, with one-third of IPA funds reportedly returned each year due to weak administrative readiness (Interview with EU Delegation official MK05, 26/03/2025).

Experts on EU integration raised concerns about structural economic dependency on the EU. While North Macedonia's economy is highly integrated with Europe—particularly through trade with Germany—there is a severe imbalance in the level of EU financial support per capita between candidate and Member States (approximately 1:10). This disparity fuels public resentment, accelerates brain drain, and widens the development gap, making EU membership appear increasingly elusive (interview with former official MK13,

26/03/2025). The Growth Plan is a positive step, but it holds more symbolic political value than tangible impact due to North Macedonia's limited absorption capacity. Structural issues within the public administration—including difficulties with writing Terms of Reference, applying for tenders, and managing IPA funds—undermine the country's ability to benefit from EU support (Interview with EU Delegation official MK05, 26/03/2025). Despite limitations, experts suggest that closer integration with the EU Single Market—a component of the Growth Plan—could bring more economic certainty, improve the business climate, and help rebuild investor confidence.

Negative socioeconomic influence from abroad was not salient in the debates. It was noted in expert interviews (MK05 and MK06) that North Macedonia remains substantially dependent on imported energy, especially Russian natural gas. While the country has diversified somewhat, it still lacks energy security due to limited domestic production and underdeveloped infrastructure. China's role is described as minimal in direct investment, but strategically focused on infrastructure and logistics, especially the connection with the Thessaloniki port. China is not perceived as a strategic economic or political threat, but rather as a distant actor with limited practical influence in the domestic economy. Türkiye has a stronger economic footprint, particularly in airport management and businesses reliant on low value-added jobs, but this presence is largely described as pragmatic. However, investigative journalists raised concerns about the role of Turkish capital in money laundering, construction-sector inflation, and illegal activities, including fake visa operations and gambling networks tied to the Turkish mafia (interview MK14, 27/03/2025).

North Macedonia's geographic position at the crossroads of Southeast Europe offers both strategic importance and untapped opportunity. As a landlocked country situated between key regional transport corridors, it serves as a natural transit hub linking Western Europe with the Aegean, Adriatic, and Black Seas. Expert interviews with former and current government officials (MK09 and MK12) emphasised the significance of Corridor 10, traditionally dominant in facilitating north–south trade through Serbia and Greece, and the emerging potential of Corridor 8, which connects Bulgaria to Albania via North Macedonia. Corridor 8, now included in the EU's Trans-European Transport Network (TEN-T), is viewed not only as a catalyst for regional development but also as a critical geopolitical and logistical asset for NATO, enhancing the country's role in humanitarian aid delivery and military mobility. Despite its favourable location, experts noted that North Macedonia has struggled to fully capitalise on this advantage due to underinvestment, political inertia, and historic infrastructure decisions dating back to Yugoslavia that sidelined east–west connectivity. Operationalising Corridor 8 and improving transport infrastructure more broadly are seen as essential steps toward leveraging the country's geography for economic growth, energy diversification, and greater regional influence.

In short, North Macedonia's most significant threats are homegrown and deeply entrenched within its socioeconomic system. Labour force depletion, weak institutional capacity, and public disillusionment form a toxic triad that threatens the country's resilience, EU integration, and long-term viability. While foreign actors like Russia, China, and Türkiye have some economic presence in North Macedonia, their influence is largely viewed as limited or pragmatic, with energy dependence on Russia remaining the most tangible external vulnerability. North Macedonia's strategic location offers significant potential for regional connectivity and geopolitical leverage, but this remains underutilised due to infrastructure gaps and political

inertia. Addressing these issues requires immediate, coordinated, and transparent policy action driven by national priorities and supported by international partners.

7.5. Political threats, opportunities and resilience

North Macedonia's political landscape is marked by chronic instability rooted in both domestic dysfunction and external interference, with profound implications for democratic consolidation and EU integration. One of the most persistent internal challenges is the slow pace of EU accession, heavily shaped by repeated vetoes from neighbouring states, particularly Bulgaria. These blockages have not only stalled reform momentum but have fuelled public frustration and political cynicism, undermining trust in both domestic institutions and the EU's willingness to deliver on its promises. Although public opinion remains broadly pro-European, the growing perception that key compromises—such as the name change—have yielded few tangible results has eroded the credibility of the EU path. "Only because Macedonia has been in this neighbourhood, where history means more than real life, unfortunately," reflected one expert. (Interview with Government official MK02 26/03/2025)

Political polarisation is deepening, increasingly shifting from ethnic cleavages to entrenched divides between rival political blocs. Citizens and experts alike warn that these divisions, combined with declining trust in political leadership, are exacerbating social fragmentation and raising the risk of instability. Protests and the influence of regional political turbulence—especially from Serbia, Kosovo and Bosnia and Herzegovina—are seen as potential catalysts for unrest. The political class is widely viewed as disconnected and self-serving, with politics reduced to a mechanism for personal and partisan gain rather than public service. The exodus of competent professionals from public life has only intensified perceptions of a hollowed-out political elite, unable or unwilling to tackle the country's structural problems.

Corruption is identified as a systemic and cross-cutting threat, undermining governance, weakening institutions, and distorting economic policy. Cronyism, nepotism, and clientelism are deeply embedded in the public administration, with political loyalty often outweighing competence in appointments. The judiciary lacks independence, compromised by political interference and used as a tool to shield ruling parties from accountability. Parliament, constrained by closed party lists, operates more as an extension of party leadership than a representative body. These dynamics have fostered a climate of impunity and further alienated citizens from formal political processes.

The fragility of institutions extends to coalition politics, which remains transactional and ideologically incoherent. Political alliances are perceived as pragmatic arrangements lacking ideological substance, formed primarily to maintain power rather than to implement a policy agenda (Interview with civil society expert MK03 27/03/2025). This has resulted in government instability, policy inconsistency, and weakened legislative capacity. Debates over sensitive issues—such as the Law on Languages or the dismantling of provisions from the Ohrid Framework Agreement—risk reviving ethnic tensions and undermining fragile power-sharing arrangements. The lack of an effective institutional buffer against undue political interference has also raised concerns about erosion of democratic norms, with key safeguards dismantled or bypassed.

The societal role and political influence of the Macedonian Orthodox Church (MOC) should not be underestimated, although some interlocutors do not perceive it as interventionist. On one hand, it is central

to national identity, particularly after it regained autocephaly, and enjoys strong public support. On the other, its alignment with conservative political forces and hesitance to criticise Russia has made it a vehicle for soft influence, especially in anti-Western narratives. Although it was granted autocephaly by the Serbian Orthodox Church in 2022, this recognition appears to have politically and ideologically tethered the MOC closer to Moscow (interview MK11, 20/12/2024). Experts warns that the MOC's connections with the Serbian Orthodox Church and Russia can be problematic, especially when church figures spread Kremlin-aligned messages or push back against liberal democratic values, contributing to societal polarisation and undermining Euro-Atlantic integration efforts.

External actors further complicate the domestic political terrain. One expert focus group participant highlighted that "political parties around here, they tend to use external actors as some sort of legitimacy of their rule," pointing out that both current and former governments have done so. This instrumentalisation varies by party and context—for example, VMRO-DPMNE's closeness with Hungary's Fidesz and Serbia's SNS, or SDSM's past alignment with EU-centric narratives. This reflects a structural vulnerability in North Macedonia's political system: instead of relying on domestic accountability, performance, or citizen trust, parties seek external endorsement to shore up authority and mask failures at home, presenting themselves either as defenders of sovereignty or champions of European integration, depending on their political base. A system that is highly externally referential is more vulnerable to foreign influence. (Expert FG, interview MK09 26/03/2025)

Finally, a growing call for deeper EU involvement speaks to the depth of public disillusionment. Drawing comparisons with EU engagement in Greece and Romania, some voices argue that only direct EU oversight could break the cycle of corruption and mismanagement (citizen FG in Skopje, 26/03/2025). Yet the absence of such measures fuels scepticism about the EU's resolve and ability to uphold reform standards. Ultimately, while North Macedonia remains rhetorically anchored to the European project, its internal political fragmentation, institutional weakness, and corrosive external influences pose significant barriers to meaningful progress.

7.6. Perceptions of friends and foes in the neighbourhood and on the global chessboard

"Birds of a feather flock together; everything else is demagoguery." (participant in the focus group with citizens)

Recent public opinion surveys showed that for North Macedonia, 34 % of respondents consider neighbouring Serbia its most important ally (IRI 2024), reflecting shared ex-Yugoslav heritage and close ties between the incumbent governments. Serbia has also been very salient in both focus groups and expert interviews as a relevant external actor in the country. Serbian influence in North Macedonia is widely perceived as both culturally entrenched and politically consequential. Citizens acknowledge longstanding historical and religious ties, particularly through shared Orthodox Christian traditions and linguistic familiarity, which make Serbian media and narratives especially resonant. This cultural affinity, however, has increasingly become a vehicle for political messaging aligned with Serbia's interests. Serbian media content—widely consumed in North Macedonia—not only dominates the information space but often amplifies anti-EU and pro-Russian

narratives. Political parties such as Levica and figures like Ivan Stojković are viewed as beneficiaries of Serbian political backing, promoting agendas that challenge North Macedonia's pro-European consensus.

Experts emphasise that Serbia functions as a key conduit for external influence, particularly from Russia and Hungary, due to its dominant role in North Macedonia's media ecosystem and cultural life. Serbian soft power operates through television networks, online portals, and religious institutions, reinforcing conservative and anti-liberal values that often conflict with North Macedonia's EU aspirations. Moreover, Serbian political support for nationalist parties like VMRO-DPMNE and close ties to the Macedonian Orthodox Church are seen as strengthening illiberal forces within the country. The perception that Serbia serves as a model of stable, assertive governance—especially under President Vučić—has gained traction among parts of the Macedonian public disillusioned with domestic political elites. As one expert summarised, warning of taking the more familiar road by inertia: "So basically now we have two options. To be periphery of Brussels, which we don't want, and to be periphery of Belgrade, which we obviously want because we were used to that role for 50 years, at least." (interview MK12, 26/03/2025) This growing admiration for Vučić's model of strongman rule, however, risks legitimising authoritarian tendencies and complicates efforts to sustain democratic reforms and multiethnic accommodation.

Russian influence in North Macedonia is widely perceived as indirect but strategically disruptive, operating primarily through media, cultural, and ideological channels. Experts and focus group participants emphasised that Russia does not seek traditional alliances but aims to sow distrust, polarise society, and undermine the country's Euro-Atlantic integration. Despite bans on outlets like Sputnik and Russia Today, Russian narratives continue to circulate widely via Serbian-language media, which dominates the Macedonian information space. This influence is reinforced through the Orthodox Church, conservative political actors, and online disinformation campaigns, particularly around key moments such as the Prespa Agreement. While Russia lacks significant economic or institutional presence in the country, its ability to exploit existing grievances and amplify anti-EU, anti-liberal sentiment—often through proxies like Serbia or ultra-conservative groups—poses a persistent challenge to democratic reform and regional alignment.

Hungarian political influence in North Macedonia is increasingly seen by experts as a more immediate and systemic threat to democratic development than Russian interference. Hungary has cultivated a strategic alliance with the right-wing VMRO-DPMNE party, offering ideological alignment, political support, and significant financial backing, including favourable loans and media ownership. Experts note that Hungary's influence operates through a consistent, structured campaign to export illiberal governance models, with Viktor Orbán serving as a mentor figure to local political elites. This support has materialised in joint government sessions, expedited loan agreements, and the acquisition of key media outlets that amplify pro-government and anti-EU narratives. The alignment is not merely rhetorical; Hungary actively promotes far-right discourse, disinformation, and anti-human rights content through its media investments, contributing to democratic backsliding and polarisation. Some analysts warn that Hungary's role as a conduit for Chinese financial interests further complicates the geopolitical landscape (interview MK15 10/04/2025). In contrast to temporary gestures by other EU members, Hungary's engagement is described as ideological, persistent, and deeply embedded, reinforcing authoritarian tendencies and posing a significant obstacle to the country's European integration.

Türkiye's influence in North Macedonia is multifaceted, blending cultural diplomacy, economic investment, and religious affinity—particularly among Muslim and Albanian communities. According to the citizen focus group, Türkiye is generally viewed positively, especially due to its support for infrastructure and cultural projects in regions with significant Muslim populations. This perception is shared by many political elites, who see Türkiye as a friendly ally rather than a geopolitical threat. Expert focus group participants echoed these sentiments, highlighting Türkiye's role in soft power projection through TIKA-sponsored development projects, education, and media cooperation. While not perceived as overtly political, Türkiye's growing cultural footprint—particularly in promoting traditional and patriarchal values—was noted as a subtle but significant influence on local social dynamics. Experts explain that Erdogan is idolised by a large portion of the population (also IRI 2024), including ethnic Macedonians, with strongman politics broadly admired, reflecting a dominant social mood that normalises authoritarian leadership models.

However, expert interviews introduced a more critical view, pointing to the less visible and potentially problematic dimensions of Türkiye's presence. Experts flagged Türkiye's growing political soft power, with some decisions in Skopje allegedly influenced by Ankara, particularly through institutions like the Erdogan-linked International Balkan University (interview MK15). Discrepancies emerge between the generally favourable public perception and the expert concern over opaque financial flows and political influence. While not considered a direct threat, Türkiye's presence is seen as highly embedded and conditional on its own domestic stability; any internal crisis in Türkiye could reverberate strongly in North Macedonia, given the depth of economic, cultural, and political entanglement (interview DT09).

Chinese influence in North Macedonia is largely perceived as subtle, soft-power driven, and primarily focused on projecting a positive image of China through media, education, and economic partnerships. Expert interviews and focus groups highlight extensive media cooperation, with Chinese-sponsored content and programmes regularly broadcast through local outlets—often in coordination with the Chinese embassy in Skopje. These efforts, including scholarships and academic exchanges, are seen as fostering long-term goodwill and loyalty among select elites. While such initiatives are not inherently aggressive, concerns have been raised about their potential to shift public perception toward viewing China's authoritarian model as a viable alternative to liberal democracy. China has invested in infrastructure, most notably the controversial and incomplete Skopje–Ohrid highway, which became a symbol of corruption and inefficiency after being exposed in the 2015 political scandals. Though North Macedonia has since distanced itself from China's 16+1 and Belt and Road initiatives—under pressure from Western partners—China retains a symbolic and growing presence, using cultural diplomacy and economic narratives to maintain relevance without overtly challenging the country's Euro-Atlantic orientation.

Bulgaria is widely perceived in North Macedonia as a significant political threat, particularly due to its use of veto to block the country's EU accession process over historical and identity-related disputes. According to recent surveys, 23 % of citizens identify Bulgaria as the most important regional threat (IRI 2024), a view echoed in citizen focus groups, where Bulgaria's veto is seen as a major obstacle to both political and socio-economic progress. Expert interviews highlight how Bulgaria imposes bilateral conditions—such as demands to amend the Macedonian constitution or revise school curricula—despite lacking reciprocal recognition of a Macedonian minority. Experts warn that such practices not only fuel nationalist backlash within North Macedonia but also erode public trust in the EU, which is seen as failing to curb opportunistic blockades. The

naming of Bulgarian cultural clubs after controversial figures associated with wartime atrocities further exacerbates tensions, deepening the perception of Bulgaria's role as a provocateur rather than a constructive neighbour (interview MK12). Overall, experts argue that unless the EU reforms its decision-making process and assumes a more balanced mediating role, Bulgaria's continued obstruction could undermine both North Macedonia's democratic stability and the credibility of the broader EU enlargement agenda.

7.7. Policy areas

To advance democratic consolidation and EU integration, North Macedonia must implement a coherent set of reforms that directly respond to the demands of its citizens and the insights of policy experts. Both citizens and expert interlocutors agree that advancing the rule of law is the cornerstone of resilience. They expect of the EU to adjust its enlargement policy and provide key assistance to these reform efforts. The recommendations in prioritised policy areas that were collected during the field work have been summarised below.

1. Education system reform

One of the most urgent priorities identified by citizens is the reform of the education system, which they view as the foundation for long-term societal transformation. Education should shift its focus from the formal acquisition of degrees to the development of practical knowledge and skills, better aligned with labour market demands. This includes strengthening vocational training, modernising curricula, and ensuring that the system equips young people with competencies relevant to a digital and green economy. Improving education is also closely tied to addressing youth emigration. Citizens have emphasised that a better education system could help retain young talent and reduce the appeal of leaving the country. Experts have echoed this, highlighting that improving educational outcomes and linking them more directly to market needs is critical for reversing the brain drain and strengthening economic resilience.

2. Reform of the judiciary and rule of law

In parallel, reforming the judiciary and public administration is essential. Citizens have made it clear that the current judicial system lacks independence and efficiency, with widespread perceptions of political interference and impunity. To address this, some have gone so far as to propose bringing in external judges and administrators to oversee reform processes in sectors such as justice and healthcare, underlining the depth of public distrust. The demand is not simply for punitive action but for competent, credible institutions capable of delivering fair and transparent outcomes. Experts agree that the absence of a functioning judiciary is a major barrier to EU integration and democratic development. They have recommended that the EU provide targeted support for judicial and public administration reform, including measures to enhance merit-based recruitment, reduce political patronage, and restore the integrity of legal institutions. Without such improvements, efforts to improve governance will remain superficial and the broader reform agenda will stall.

3. Public administration and oversight

Another key issue raised by both citizens and experts is the need to strengthen legislative transparency and institutional competence. Citizens have emphasised that current laws do not provide sufficient oversight or

accountability, making it difficult for the public to assess whether the country is on a credible path toward reform. They advocate for legal changes that would enable greater scrutiny of government performance and empower citizens to hold institutions accountable. Experts support this perspective, warning that without transparency in public procurement, budget allocation, and institutional decision-making, democratic norms will continue to erode. They argue that the EU should link its financial support more directly to demonstrable improvements in governance and transparency, ensuring that assistance serves as a tool for reform rather than a substitute for it.

4. EU enlargement process

Expert interlocutors stressed that the EU must reframe its approach to enlargement as a matter of strategic interest, not just bureaucratic process. One of the most widely shared frustrations is the impact of the unanimity principle in EU decision-making, which has allowed individual Member States to block progress based on bilateral disputes. This dynamic has fed disillusionment and Euroscepticism in North Macedonia, undermining reform momentum and fuelling perceptions of double standards. Experts have recommended that the EU adopt a more robust posture in its engagement with the region—by supporting mechanisms to prevent bilateralisation of the enlargement process and switching to qualified majority voting on interim enlargement steps, enhancing its communication strategy to counter disinformation, and explicitly linking financial assistance to reform benchmarks. The idea is not merely to demand compliance, but to make the benefits of EU integration more tangible.

Additionally, experts have highlighted the need for the EU to deepen North Macedonia's participation in key European policy frameworks, particularly in the fields of Common Foreign and Security Policy, and Common Security and Defence Policy. Offering North Macedonia a seat at the table in EU deliberations on these matters would help restore a sense of ownership in the accession process and counteract the growing influence of non-EU actors such as Russia and China. Enhanced involvement in EU security and defence structures could also provide a platform for much-needed investment in critical infrastructure, cyber resilience, and strategic sectors. This would not only build capacity but also signal that EU membership is a real and evolving process, not a distant or symbolic aspiration.

Finally, there is consensus on the importance of improving the overall socioeconomic environment as a condition for democratic renewal and EU integration. Experts have proposed that the EU focus more directly on reforms that address cost-of-living pressures, wage stagnation, and limited economic opportunity— factors that have contributed to widespread public frustration. Strengthening regional economic integration, formalising the informal economy, and improving access to finance for domestic entrepreneurs are all seen as important steps. In this context, the role of civil society is also key. Interviewees noted that North Macedonia's civil society sector is maturing and increasingly capable of playing a constructive role in monitoring reforms and facilitating public engagement, provided it remains autonomous and is adequately supported. Religious institutions, meanwhile, are viewed as non-interventionist, and the country's secular political culture offers a solid foundation for inclusive governance if sustained.

Together, these recommendations point to a clear course of action. North Macedonia needs to focus on a small number of high-impact reforms: modernising education, strengthening judicial independence, increasing legislative transparency, and ensuring that EU support is better aligned with domestic reform

goals. The EU, for its part, must treat enlargement as a geopolitical imperative and structure its engagement in a way that rewards credible progress and deters obstruction. Only through this dual effort—rooted in domestic commitment and reinforced by consistent external support—can North Macedonia fulfill its potential as a stable, democratic, and resilient member of the European family.

7.8. Conclusion

North Macedonia's most serious vulnerabilities lie not in foreign-imposed threats, but in domestic dysfunction: the erosion of public trust, stagnant reform processes, and entrenched state capture by political and economic elites. These are not simply homegrown failures but are actively sustained by external validation from illiberal allies and by the EU's hesitant, inconsistent approach to enlargement. The findings presented here underline that corruption, democratic backsliding, and institutional fragility are overwhelmingly internally driven. It is not that foreign actors are undermining North Macedonia's democracy by force; rather, domestic elites—who have captured institutions for personal gain—seek legitimacy and protection from strongmen abroad, particularly those who model authoritarian governance. Hungary, Serbia, and Türkiye emerge as far more influential in this regard than the more commonly discussed powers like Russia or China. They provide political cover, financial resources, and ideological frameworks that reinforce the status quo.

Serbia's influence is deeply embedded through cultural proximity, media saturation, and political alignment, while Hungary plays an increasingly active role in exporting illiberal models, especially via its alliance with VMRO-DPMNE. Türkiye is broadly seen as a pragmatic and friendly partner, but its influence—especially among Muslim communities—warrants scrutiny, as it subtly reinforces authoritarian values and has been linked to illicit financial networks. Even Bulgaria, an EU Member State, is perceived not as a benign neighbour but as a direct political obstacle through its veto on North Macedonia's EU accession. Its insistence on identity-related conditions—amplified by provocative cultural symbols—has not only inflamed nationalism but also diminished the EU's credibility. These findings compel a reframing of the geopolitical conversation. While Russia and China continue to exert influence through soft power and strategic messaging, it is the regional actors—sometimes EU Member States themselves—who most directly obstruct democratic consolidation and EU integration of North Macedonia.

A recurring theme across citizen and expert inputs is the feeling of being small, peripheral, and left behind. North Macedonia is structurally integrated with the EU economy, but politically and symbolically excluded from decision-making. Despite meeting key EU requirements, the country remains trapped in accession limbo due to the unanimity rule and the politicisation of bilateral disputes. This exclusion is not merely symbolic — it has real consequences. Citizens interpret the lack of progress as a sign that their efforts and sacrifices, including the painful name change under the Prespa Agreement, have not been reciprocated. The result is a growing disillusionment that undermines the EU's normative power. Yet, and this is critical, public support for the EU persists. The EU is still seen as the only viable path toward rule of law, democratic accountability, and socioeconomic progress. Citizens and experts alike call for a more credible and operationalised EU offer — one that delivers real inclusion and rewards genuine reform.

This support is not unconditional. The country's internal weaknesses—particularly judicial corruption, administrative incompetence, and political polarisation—must be tackled head-on. Education reform is the cornerstone of resilience and renewal. Citizens and experts agree that the current system produces credentials but not competence. Reforming it to match market needs, promote bilingual skills, and incentivise vocational training is key to reversing brain drain and reactivating economic mobility. In tandem, the judiciary and public administration must be professionalised. Citizens' calls for external oversight—such as international judges or administrators—reflect a profound loss of faith in domestic institutions. While such solutions may not be politically feasible, they underscore the urgency of EU-backed reforms focused on merit-based recruitment, depoliticisation, and performance-based evaluation.

Economic resilience cannot be separated from institutional reform. The current economic model privileges foreign capital and politically connected elites, widening inequality and stifling entrepreneurship. Citizens demand greater transparency in public procurement and a break with rent-seeking practices that distort the economy. Experts argue that the EU should tie its financial assistance to measurable governance benchmarks and support North Macedonia's absorption of IPA funds by investing in administrative capacity. The Growth Plan and closer integration with the EU Single Market are welcome steps, but their impact will be minimal unless North Macedonia can overcome the bureaucratic hurdles that prevent meaningful implementation.

North Macedonia's geostrategic position remains a major asset—one the country has yet to fully leverage. Corridor 8 and other regional transport links offer significant opportunities for economic development and NATO interoperability. However, chronic underinvestment and political inertia have stymied progress. Unlocking this potential requires strategic prioritisation, cross-party commitment, and external technical and financial support. Experts also emphasise that deeper involvement in EU Common Foreign and Security Policy, as well as EU defence mechanisms, would enhance the country's role in regional security and reinforce its integration path.

In conclusion, the data point to a paradox: North Macedonia is both vulnerable and resilient. It is vulnerable to internal sabotage by elites who benefit from stagnation, and to regional actors who reinforce that status quo. Yet it is resilient in its continued civic belief in the European project, in the demands of citizens for rule of law, competence, and accountability, and in the strategic value it offers to Europe. North Macedonia's trajectory remains deeply tied to the broader question of EU membership and the persistent uncertainty surrounding it. The EU now faces a choice. It can either continue to treat enlargement as a technocratic ritual vulnerable to obstruction and politicisation—or it can view North Macedonia as what it is: a test of the EU's ability to project democratic norms and stability in a competitive and fragile region. The window for meaningful intervention is closing. But with targeted reforms, credible incentives, and a shift in both domestic and EU political will, North Macedonia can still anchor itself firmly in the European democratic order.

7.9. References

7.9.1. List of interviews

Interviewee code	Affiliation	Place and Date

MK01	Civil society expert on organised crime	Skopje, *27.03.2025*
MK02	Government official	Skopje, *26.03.2025*
MK03	Civil society expert on foreign policy	Skopje, 27.03.2025
MK04	Academic researcher in sociology	Skopje, 27.03.2025
MK05	EU official	Skopje, 26.03.2025
MK06	Private sector expert	Skopje, 26.03.2025
MK07	Youth policy expert	Skopje, 27.03.2025
MK08	Military affairs expert	Online,31.03.2025
MK09	Government official	Skopje, 26.03.2025
MK10	University professor	Skopje, 26.03.2025
MK11	Local expert on church affairs	Online, 20.12.2025
MK12	Former government advisor	Skopje, 26.03.2025
MK13	Former minister	Skopje, 26.03.2025
MK14	Investigative journalist	Skopje, 27.03.2025
MK15	Civil society expert on EU integration	Online, 10.04.2025
MK16	Two local journalists	Skopje, 26.03.2025
MK17	Civil society expert on EU integration	Skopje, 26.03.2025

7.9.2. Focus Group Discussions

Focus Group Discussion	Group	Place and Date
Focus Group Discussion with experts	Experts from academia, civil society, and journalist	Skopje, 26.03.2025
Focus Group Discussion with citizens	Miscellaneous	Skopje, 26.03.2025

7.9.3. Articles and documents

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8. SERBIA

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8.1. Introduction

The REUNIR threat assessment reports for Serbia have shown that the country is exposed to numerous and complex military and security, as well as socio-economic and political threats, which are, among other things, the result of a complex interplay of authoritarian practices by the Serbian government, a balancing foreign policy, and external (malign) influences of non-EU countries (Lawrence, T. et al. 2025, Akhvlediani, T. et al. 2025 and Burmester, I. at al. 2025). As Serbia continues to position itself between the European Union and a range of non-Western partners, its path toward democratic consolidation and EU accession remains deeply contested. Studies have shown that the root cause lies primarily in domestic political dynamics and developments over the past decade.

Serbia's internal-political landscape continues to be defined by the concentration of power in the hands of the ruling Serbian Progressive Party (SNS) and President Aleksandar Vučić. Since assuming power in 2012, the SNS has progressively eroded democratic checks and balances, consolidating influence over the judiciary, media, and security sectors. The country is now widely categorised as an electoral autocracy rather than a functioning democracy. Reforms related to the rule of law and media freedoms, while often formally adopted, are selectively implemented and primarily designed to appease international actors rather than effect substantive change. Serbia's democracy is being shaped less by genuine pluralism and more by the ruling elite's efforts to preserve their grip on power. The media landscape is heavily dominated by pro-government outlets, enabling the spread of propaganda and disinformation that further polarises society and delegitimises dissent. Opposition parties remain fragmented and marginalised, while civil society and independent media continue to face pressure, operating in an environment where they are treated as adversaries rather than partners in democratic governance.

The geopolitical and foreign policy orientation of Serbia remains characterised by deliberate strategic ambiguity. Formally committed to EU accession, Serbia simultaneously cultivates strong ties with Russia, China, and the United Arab Emirates. This balancing act reflects not only economic pragmatism but also deep-seated political and ideological affinities between the Serbian leadership and authoritarian powers. Relations with Russia are longstanding and extend to political support regarding Kosovo, security cooperation, and energy dependency. Russian influence is deeply embedded in Serbia's media, political rhetoric, and far-right movements. This includes support for the concept of the Serbian World, mirroring Russia's promotion of the Russkiy Mir. This concept implies the unification of the Serbs within the same cultural, media, and political space under one strong leader, Aleksandar Vucic current Serbian president. Furthermore, the public promotion of this concept comes at a time of heightened political tension between the West and Russia and worsening political and ethnic relations within and between Serbia, Kosovo, and Bosnia. Serbia's media, dominated by pro-government outlets, amplifies pro-Russian narratives, portraying Western democracies as

hostile and unreliable partners. These narratives contribute to low levels of public support for EU membership, which now hovers around 40 %—the lowest in the Western Balkans.

China's engagement in Serbia is no less strategic. Though often framed as economic, it is increasingly political. Chinese investments in infrastructure, energy, and mining are accompanied by knowledge transfers and institutional linkages between the Chinese Communist Party and SNS. The 2024 visit of President Xi Jinping to Serbia resulted in 29 new bilateral agreements, many of which were in the political and media domains, rather than economic. In fact, the largest portion of these agreements, 10 of them, pertains to the media sphere. Although the public has no access to the contents of these agreements, the fact that Vučić's regime, which is rapidly moving toward autocracy, is signing media agreements with a communist state known as the world's largest prison for journalists, where Communist Party censorship is absolute, suggests the essence and consequences of these agreements. Additionally, research has shown that in Global South countries, China uses intergovernmental cooperation programmes (primarily exchanges and training) to expand its intelligence network and influence while exporting its authoritarian model of governance. Among the 29 signed agreements are those that allow 50 scientists to travel to China, as well as opportunities for 300 young Serbian citizens to study in China. These developments signal China's ambition to use Serbia not only as a site for Belt and Road projects but as a platform for exporting its model of digital authoritarianism to the region. China's influence is also manifest in Serbia's universities, Confucius Institutes, and the state's favourable portrayal of Chinese governance. These alignments are not merely symbolic; they structurally embed authoritarian norms and practices into Serbia's governance system.

On the military and security front, Serbia does not face imminent conventional threats but is increasingly exposed to hybrid and non-conventional threats. Cybersecurity is one of the most underdeveloped dimensions of Serbia's national security infrastructure. The country lacks a comprehensive cybersecurity strategy, and incidents of cyberattacks on public infrastructure have gone largely unaddressed. While Serbia has declared military neutrality and does not aspire to NATO membership, it maintains cooperation with both NATO and Russia. This duality, however, presents risks. Russia has historically provided Serbia with military hardware, including air defence systems and anti-tank weapons, though such exchanges have been scaled down since the invasion of Ukraine. China's role in military affairs, primarily through donations and equipment purchases, further complicates Serbia's alignment with Western security norms. These engagements risk undermining Serbia's integration into EU security frameworks, particularly as trust in information sharing and defence interoperability is eroded by ties with authoritarian regimes.

Socio-economic threats are closely intertwined with foreign political influence and domestic governance challenges. Russia's economic footprint is mainly confined to the energy sector, particularly through gas supply agreements and legacy investments in the oil industry. Although the EU has supported Serbia's diversification efforts, including the gas interconnector with Bulgaria for Azerbaijani gas, Serbia remains dependent on Russian energy. More than 80 % of the crude oil processed in Serbia used to come from Russia, primarily for the needs of the Petroleum Industry of Serbia (NIS), in which Gazprom Neft (Russia) holds a majority stake (56.15 %). However, since Russia's invasion of Ukraine, Serbia has stopped importing oil from Russia, although Gazprom still holds a majority ownership stake in NIS. However, Serbia is 85 % dependent on imported gas from Russia today. The broader economic impact of Russian presence has been relatively limited, and recent migration from Russia, though significant, does not pose a major structural threat. In

contrast, the economic influence of China and the UAE has had more profound implications. Chinese investments, particularly in mining and infrastructure, often bypass public procurement laws and are shielded from transparency requirements. These projects not only foster corruption but also degrade environmental standards and labour rights enforcement. Chinese companies have become top exporters from Serbia, and the country's foreign debt to China has grown twelvefold over the last decade, raising concerns about future economic leverage and policy dependency. According to data from the Ministry of Finance, the largest exporters in Serbia in 2023 were the Chinese companies Zijin Mining, Zijin Copper, and the HBIS Group, while German companies from the automotive industry ranked fourth and fifth. However, the exports of Chinese companies are predominantly raw materials, with limited positive impact on the domestic economy as mining royalty is only 5 % and with significant negative effects on the environment and workers' rights.

The UAE's role in Serbia is even more controversial. Through large-scale real estate projects like Belgrade Waterfront and privatisation of state-owned enterprises, the UAE has become a symbol of corrosive capital. These deals have been marred by non-transparent contracts, forced demolitions, and preferential legislation passed to accommodate foreign investors at the expense of public interest. Loans from the UAE account for a substantial portion of Serbia's foreign debt, and the long-term sustainability of such arrangements is increasingly being questioned. The resulting economic vulnerabilities—combined with growing inequality, a stagnant labour market, and demographic decline—create systemic barriers to Serbia's EU accession. Furthermore, the politicisation of foreign capital flows entrenches patronage networks that undermine the rule of law and reduce institutional accountability.

Finally, political threats to Serbia's EU path are deeply internal. The ruling SNS, backed by a loyal media ecosystem and foreign authoritarian patrons, has orchestrated a system of managed democracy. Democratic institutions are formally present but operationally hollow. The electoral process lacks fairness due to media bias and misuse of public resources, and key institutions such as the judiciary and parliament have been subordinated to executive control. Russian and Chinese actors play a role in supporting this status quo, but the principal threat to Serbia's democratic consolidation remains domestic. The ruling party's authoritarian tendencies, media dominance, and cultivation of public cynicism toward democratic alternatives inhibit the country's capacity to undertake meaningful reforms. Without internal political change and a reinvigorated EU accession process, Serbia risks becoming further entrenched in a hybrid governance model—nominally democratic, but substantively authoritarian. In this context, external support from the EU remains vital, but its efficacy will depend on a clearer stance against state capture, corruption, and foreign influence that undermines European integration.

8.1.1. The Complexity of Serbia's Political and Security Challenges as Seen by Its Citizens

Such a complex and contradictory political, security, and socio-economic situation in Serbia has also been reflected in the attitudes of Serbian citizens. REUNIR research on the attitudes of Serbian citizens towards foreign policy, security, economic, and political issues shows that public opinion in Serbia reflects deep complexity and division (Pollozhani et al. 2024). The said research represents a desk analysis providing an overview and comparison of existing public opinion researches on mentioned topics for the period from 2020 to 2024. The REUNIR research shows that the majority of citizens believe Serbia should pursue a policy

balancing between Russia and the West. About 27 % support a pro-Russian course, with an additional 12 % favouring a full pivot towards Russia, while a smaller segment (10 %) favours turning towards the EU. Nevertheless, around two-thirds think Serbia should be oriented towards both the West and Russia. This complexity is also reflected in the decline of support for EU membership, currently at about 40 %, alongside high dissatisfaction (54 %) with the seriousness of the EU's approach to new Member States.

Military neutrality enjoys very high acceptance (70 %), while support for Serbia joining NATO is minimal (only 5 %), and two-thirds oppose any cooperation with NATO. Serbian citizens see Russia and China as friendly countries with high trust levels (88 %), whereas views on the USA and some neighbours are significantly more negative. The USA and Albania are perceived as the greatest threats to Serbia, and NATO is identified as an enemy by about 65 % of citizens.

Regarding economic relations, most citizens still view the EU as Serbia's most important economic partner (64 %), although this perception has declined over the past two years. Meanwhile, China's significance is rising, with 25 % of respondents perceiving China as an important economic partner, an increase compared to previous years. Russia is recognised as an economic partner by a smaller portion of citizens (around 11 %). There is a notable mismatch between perceptions of existing economic ties and preferences: citizens tend to prefer stronger economic relations with Russia than they currently perceive, while interest in cooperation with the EU and China is somewhat lower than the actual level of engagement. The expansion of Chinese influence is particularly criticised for opaque contracts, unequal conditions for domestic companies, and corruption. The EU is seen as the main donor, but a significant portion of citizens believe Russia and China are also important actors in this area.

In terms of personal and national security, citizens express concern about internal instability, corruption, and the influence of organised crime on the state, as well as unresolved national issues like Kosovo and regional developments. While direct military threats at borders are not widely perceived, regional tensions and uncertainties—especially relating to Kosovo, Bosnia and Herzegovina, and neighbouring countries—are seen as sources of ongoing tension. External negative influences are primarily perceived through propaganda, disinformation, and distrust towards international institutions and neighbouring states. Energy dependence on Russia and China adds to these concerns, though there is also a strong expressed need for diversification and cooperation with the EU. In this context, the state apparatus and corrupt elites are viewed as the greatest domestic security risks, while international factors are assessed through their impact on Serbia's internal political stability and sovereignty.

Accordingly, many respondents express dissatisfaction with the current political system, highlighting a lack of trust in institutions and political elites. At the same time, a significant share of citizens hold conservative and nationalist views—around 77 % consider Kosovo an inalienable national interest, and slightly over half support extremist right-wing views and activities to varying degrees. 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. 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 groups. The research also notes rising support for authoritarian governance models, perceived as guarantees of

stability and preservation of national identity. About 54 % of citizens believe the EU does not offer a realistic membership perspective, contributing to growing scepticism about European integration and increased support for pro-Russian and pro-Chinese narratives.

8.1.2. Deepening the research findings

Building on the previously described REUNIR research findings on political, military, and socio-economic threats, as well as citizens' perceptions of these threats, the REUNIR research team conducted a series of interviews and focus groups with experts and citizens in order to deepen these findings, better understand them, and identify the main resilience factors available to Serbia, as well as what the EU can and should do to help prevent these threats. This paper presents the main findings from these interviews and focus groups.

8.1.3. Methodology

This analysis is based on extensive field research conducted between December 2024 and March 2025. It involved semi-structured interviews with 17 experts in the fields of security, foreign and domestic policy, economics, and representatives of international and foreign organisations active in Serbia. In addition to the interviews, one expert focus group was held with eight participants, including researchers, analysts, and policy professionals. A separate focus group was conducted with ten Serbian citizens of varying age, education, and occupational background to capture public perceptions from a diverse cross-section of society. Of the 35 participants in the research, 19 were men and 16 were women.

This qualitative research builds upon a previous phase of the project, during which threat-mapping research was conducted based on prior studies and expert assessments. The earlier phase identified the main categories of threats facing Serbia—military, socio-economic, and political—as well as their potential implications for the country's EU accession. It was also conducted a review of public opinion data concerning Serbia's foreign policy preferences, societal priorities, and security and economic concerns (Pollozhani et al. 2024). This helped shape the design of the fieldwork in the second phase and ensured that the perspectives of both elite and non-elite actors were included in the final analysis.

In an effort to ensure institutional perspectives were also reflected, the research team formally requested interviews with representatives of relevant state institutions. Unfortunately, these requests were unsuccessful. This lack of engagement reinforces the key findings of the research: that Serbia is increasingly sliding into an authoritarian model of governance, where transparency and dialogue are systematically replaced by propaganda and centralised control over public discourse.

The research was conducted during a period of mass student and citizen protests against the authoritarian government in Serbia which started after train station canopy collapsed on 1 November 2024, due to high political corruption killing 16 people. The authorities responded by ignoring citizens' demands, labelling protesters as traitors allegedly funded by Western intelligence services, and resorting to para-institutional violence. As a consequence, there was a widespread atmosphere of mistrust and fear not only among protesting citizens, but also within state institutions, particularly towards individuals coming from abroad and asking questions related to political and security issues.

8.2.   Military threats, opportunities and resilience

"As far as military security is concerned, I don't think we are so militarily endangered at the moment… I don't see anyone threatening us militarily." Citizen, focus group participant

Respondents converged on the view that Serbia currently faces no imminent conventional military danger from external powers. Several interviewees insisted that the gravest risks are "home-grown" and political in nature. A military analyst claimed that the greatest security hazard is internal instability produced by state capture, organised crime and deep social polarisation, while unresolved regional disputes present a secondary layer of risk. "Serbia is its own greatest threat. Internal instability, societal divisions, the deep infiltration of organised crime into the state apparatus, and the hijacking of state institutions are actually the most significant potential security problems for Serbia", argued analyst. Another security expert likewise dismissed "classical military threats," adding that Serbian regime habitually amplifies external dangers for domestic political mobilisation, whereas the substance of vulnerability lies in weak institutions that invite foreign influence. A security specialist at the embassy of an EU Member State went further, explicitly excluding conventional war scenarios from the list of credible threats and instead emphasising uncertainty, distrust and cyber vulnerabilities. Citizens participating in the focus group agreed that the likelihood of Serbia becoming involved in a military conflict is low, partly because "there is no one to fight," meaning Serbia lacks the resources for such an endeavour.

Although the probability of Serbia engaging in a conventional military conflict is very low, some experts interviewed noted that Serbia could be indirectly drawn into such a conflict if the war in Ukraine escalates into an open confrontation between Russia and the West. For example, it is not impossible that neighbouring Romania could come under military attack from Russia. Serbia and Romania share a hydroelectric power plant that could be targeted by Russian forces. In such a scenario, there could be stronger pressures on Serbia to abandon its policy of military neutrality and choose a side, with possible direct actions forcing Serbia's compliance. However, this scenario is considered unlikely. Nevertheless, participants emphasised that the absence of conventional conflict does not mean that Serbia is secure. The perceived threat landscape is dominated by hybrid, deniable, and systemic pressures, many of which exploit Serbia's internal governance weaknesses.

A recurring theme was the concept of "calibrated instability." This refers to a pattern of manufactured or opportunistically amplified crises—especially in border regions and minority-populated areas—aimed at testing Serbia's strategic posture, straining domestic cohesion, or signaling influence. Examples cited by respondents included orchestrated protests in northern Kosovo, flag-planting incidents, use of ambiguous actors to disrupt transport corridors, and small-scale armed skirmishes. These incidents do not escalate to war but disrupt normal life, attract international media attention, and pressure Belgrade to display loyalty or restraint depending on the geopolitical context. For local communities, especially those living in ethnically mixed municipalities or near administrative boundaries, such disruptions create fear and a sense of abandonment, fueling mistrust towards both state authorities and external guarantors of peace.

Russia's role in shaping this theatre of low-intensity instability is widely acknowledged. Analysts described Moscow's influence as multifaceted, operating through diplomatic alliances with Republika Srpska, ideological support to Serbian nationalist movements, and information campaigns aimed at deepening

polarisation. Military analyst noted Moscow's open alignment with Bosnian Serb leader Milorad Dodik and its capacity to stir secessionist rhetoric in Bosnia-Herzegovina, thereby pressuring Serbia through regional tension. Interviewees differed, however, on whether Russia possesses either the resources or the strategic interest to engineer an open conflict that would drag Serbia into larger conflict; several judged such a scenario unlikely as long as Belgrade refrains from sanctions and continues to allow Russian media free rein.

Türkiye does not pose a direct military threat to Serbia, but its increasingly selective military cooperation with Bosnia and Herzegovina, as well as with Albania and Kosovo, is viewed in Serbia as a potential future security concern and a form of hybrid influence. Military analyst pointed to Ankara's military assistance to Bosnian units as evidence of geopolitical competition that could indirectly affect Serbian security perceptions. Türkiye's Bayraktar drones are operated by multiple security actors in the region, including Kosovo, which Serbia does not recognise as independent. Serbian decision-makers, eager to avoid regional military imbalances, monitor these developments closely and consider counter-purchases, potentially drawing Serbia into procurement races influenced by non-EU actors. Ankara's selective cooperation with B&H army and deployment of Turkish security hardware in parts of the Western Balkans contribute to the perception that Türkiye is hedging its position in the region. However, Türkiye is much more linked economically to Serbia than BiH.

Citizens in the focus group perceived Türkiye as a more direct threat to Serbia, with one participant stating: "Türkiye sends more and more troops to the territory of Kosovo and Metohija, and supplies Albania with weapons, which also poses a military threat." Some participants argued that Türkiye's growing military presence in the Balkans reflects neo-Ottoman ambitions of its political leadership, aiming to restore influence over former Ottoman territories. "They are sending more and more troops to Kosovo and Bosnia... It feels like a clerical state advancing on secular ground", one focus group participant explained in this way Turkish current activities in the Balkans.

China was virtually absent from hard-security concerns, with no respondent attributing any overt military designs on Serbia to Beijing. Instead, China's role emerged under economic and political headings. Experts expressed particular concern over the use of Chinese technology in Serbia's security infrastructure, described as a form of "quiet infiltration." The widespread deployment of Huawei Safe City surveillance systems in Belgrade, Kragujevac, Novi Sad and Niš integrates artificial-intelligence-driven facial recognition, with data stored on overseas servers. Security experts warned that such systems, while promoted as public safety tools, could be repurposed for espionage or to monitor foreign diplomats, protesters, or political opponents without EU-standard oversight. Furthermore, Chinese 5G core components complicate Serbia's ability to interconnect seamlessly with future EU defence communications, given Brussels' tightening vendor-screening protocols.

Cybersecurity attracted sustained attention among experts. Respondents described Serbia as a node through which malicious code could transit toward Western Balkan neighbours and EU markets, because a significant share of public administration hardware runs on legacy operating systems. They cited three separate incidents in winter 2024–25 in which denial-of-service attacks and malware infections forced temporary shutdowns at an electricity distributor, a municipal water company, and a university data centre. None caused lasting outages, but forensic evidence suggested coordination by actors with resources beyond ordinary

cybercriminal networks. The key concern is that successful penetration would allow an external power to extract sensitive data—on customs, population registries or judicial evidence—building leverage for future political or commercial bargaining. Foreign policy expert acknowledged the possibility of large-scale cyber disruption, especially spill-over from regional conflicts or attacks on shared critical infrastructure, but still sees Serbia as an indirect rather than primary target.

8.2.1. Resilience factors

Factors enhancing Serbia's resilience in the defence sphere included continued NATO/KFOR deployments in Kosovo, Bosnia and the wider Western Balkans, seen as practical brakes on escalation; gradual strengthening of Serbia's own cyber-defence capabilities; and, above all, institutional and legal reforms linked to EU accession, which could narrow the space for malign hybrid operations if implemented effectively. Consensus on these points was strong, although opinions varied on the government's current political will to pursue reforms.

Some experts and citizens repeatedly highlighted military neutrality as a popular domestic policy, albeit one not universally supported in Brussels, that guarantees stability. This policy allows Serbia to cooperate with both NATO and non-Western actors while avoiding entanglement in security blocs. Security experts credited NATO's Partnership for Peace programme, in which Serbia remains an active participant, with facilitating military professionalisation and maintaining informal communication channels in crises. The collective trauma of the 1990s conflicts also acts as a psychological and cultural restraint against war, especially among older generations who recall its human costs. Some analysts warned, however, that these buffers erode if disinformation campaigns normalise militaristic rhetoric or if opaque defence deals bypass parliamentary oversight.

8.3. Socio-economic threats, opportunities and resilience

"Every economist can see we are a state that has bankrupted… we will have to give something vital, a mine, a site… to repay those loans." Economic journalist

Economic vulnerabilities occupied far more respondents time than military ones. However, as with military threats, both experts and citizens emphasise that Serbia's most profound threat is internal, rooted in governance weaknesses, lack of transparency, and the concentration of power in the hands of a single political figure, Aleksandar Vučić and his ruling Serbian Progressive Party (SNS). This internal environment facilitates systemic corruption, inefficient public administration, and the erosion of democratic institutions, which in turn deter genuine socio-economic development. Institutions, including the judiciary and regulatory bodies, are perceived as captured and politicised, weakening rule of law and undermining investor confidence.

This governance deficit manifests in a fragile business environment where foreign investors—whether from EU countries or third countries—operate with uneven conditions, often benefiting from opaque state agreements that circumvent public procurement rules. This system privileges companies with close ties to the ruling elite, generating market distortions, inefficiency, and corruption. Public sector reforms are largely

absent, sustaining a bloated and inefficient public sector that consumes significant fiscal resources without delivering commensurate economic benefits.

According to respondents, Serbia's geopolitical ambiguity, described as a "seesaw" between the EU and non-EU powers, particularly Russia and China, is a significant theme within the socio-economic domain. This ambiguous position creates uncertainty for both domestic and foreign actors. Many European companies have reduced or halted contracts with Serbian firms due to doubts about Serbia's commitment to EU integration and the opacity of the political-economic system. This has been particularly acute since the imposition of sanctions on Russia following its war in Ukraine, which has complicated Serbia's economic ties and damaged Serbia's image as a stable partner in European supply chains. Two business-association leaders described a growing "trust deficit" among EU corporate partners since 2022. Serbia's ambiguous foreign-policy posture, they reported, has led European clients to freeze or divert contracts worth up to one-fifth of projected revenues, favouring suppliers in EU Member States instead. "Our companies suffer a lot because Serbia is not in the EU, because for the last three years, many of them lost contracts and jobs, engagements from some European companies. Why? Some European partners think that we are not so sustainable and so sure as a partner," argued business association representatives. They linked this trend to Belgrade's alignment with Russia and China and to perceptions that domestic courts, inspections and labour standards are politically manipulated.

China's role has grown considerably in recent years, primarily through large infrastructure projects and acquisitions of strategic enterprises. Chinese investments, while financially significant, are criticised for lacking transparency, bypassing competitive public procurement, and imposing labour standards that diverge sharply from Serbian and EU norms. The Chinese business model in Serbia emphasises leader-to-leader deals and close political ties, which conflict with the EU's emphasis on transparent, rule-based governance. As an International relations research fellow from the Institute of International Politics and Economics puts it, "Chinese capital builds bridges—literal and political—but not institutions."

The growing Chinese presence is linked to a rising trade deficit and concerns that Serbia may become a base for "dirty" technology production, which undermines environmental and labour standards. Interviewed experts stressed that the aggregate value of Chinese-executed deals—many still in the pipeline—now approaches or exceeds EUR 7 billion. Yet the fiscal burden of these ventures is compounded by the structure of lending: earlier packages were anchored in credit lines from the China Exim Bank; more recent ones rely on Western commercial banks but are nonetheless guaranteed by Chinese financial institutions, which leaves Serbia doubly exposed to market volatility and Beijing's diplomatic leverage. Business association representative explained that many Chinese investments are not lucrative for Serbia, as "…our export in China on the paper is EUR 5 billion, but we export the raw materials, especially copper, for EUR 4 billion. And the state fee, mineral royalty, for all those raw materials is only 5 %." Experts considered these projects an indirect but serious threat to EU accession, as they entrench standards that are not aligned with the EU and include clauses allowing the application of Chinese labour and environmental regulations on Serbian territory for up to five years.

Chinese finance arrangements with Serbian government drew the sharpest criticism by participants of the focus group with citizens. Participants spoke of highway and rail ventures whose real cost is hidden by

confidentiality clauses, of collateral arrangements that could transfer land or mining rights to Chinese firms should Serbia default and of environmental damage caused by smelters, coal plants and prospective lithium extraction. Some even worried that Beijing's collateral model would allow it to station security personnel around critical infrastructure, blurring the line between economic and military reach.

However, there were respondents who has some positive view on the net effect of Chinese capital. Two interviewed experts from one international organisation acknowledged that Beijing's investments had filled infrastructure gaps. Still, they insisted that Serbia lacks the regulatory strength to enforce transparency and competition, rendering such deals strategically costly. Some local analysts, by contrast, considered Chinese finance indispensable for short-term employment and regional connectivity, arguing that the real danger arises only if EU integration stalls and alternative standards displace European norms.

Most economic experts agree that economic cooperation with Russia has stalled or reversed due to Western sanctions and the war in Ukraine. However, they also warned that the energy sector remains a focal point of geopolitical and economic vulnerability of Serbia towards Russia. Despite recent efforts to diversify gas sources through interconnectors with Bulgaria and plans for liquefied natural gas imports, Serbia remains deeply reliant on Russian energy. Contracts with Gazprom-linked entities are often long-term and include opaque clauses that allow for price manipulation or supply withholding under vague conditions. This energy dependence grants Moscow significant leverage not only over Serbia's economy but also over its foreign policy orientation, particularly in moments of regional crisis.

Türkiye and Gulf countries, such as the United Arab Emirates (UAE), are also notable players. Economists praised Turkish manufacturing plants in southern Serbia for creating thousands of jobs, yet labour-union representatives warned that wage levels remain marginal, employment conditions fragile and local suppliers largely bypassed. Gulf states have made large-scale real estate and infrastructure deals (e.g., Belgrade Waterfront) often characterised by non-transparent terms unfavorable to Serbia's public interest. These deals raise concerns about the loss of sovereignty over strategic assets and the financial risks associated with loan repayments.

However, debt is only part of the story. Nearly every speaker linked foreign influence to Serbia's entrenched corruption. They argued that international lenders and investors, whether Chinese, Emirati or European, exploit the absence of transparent tendering and the weakness of independent regulators. Public funds, they said, leak through inflated procurement contracts, while bribes and political patronage divert EU pre-accession assistance from hospitals, schools and local infrastructure. In this sense, the most acute socio-economic threat is self-inflicted: a culture of impunity that allows external actors to buy influence cheaply and to override environmental and labour safeguards.

However, many interviewees, including both experts and citizens who participated in focus groups, expressed concern that the EU has recently begun to behave towards Serbia in a manner similar to China. Namely, the EU, in its effort to secure strategic resources such as lithium for battery production and maintain competitiveness against China, has increasingly engaged in non-transparent deals that disregard its standards on the rule of law and environmental protection. The Jadar project exemplifies this approach, having become a symbol of political corruption, democratic backsliding, and colonial-style exploitation in the eyes of many Serbian citizens. As highlighted by economic experts, ignoring the will of the local population while tacitly

supporting authoritarian governance in exchange for geopolitical resources seriously undermines the EU's credibility and deepens social divisions. They stated that such a project might cause long-term damage to democracy and EU integration, especially if the EU prioritises access to lithium over reforms and public sentiment. Rather than acting as a partner in reform and sustainable development, the EU is perceived by the Serbian public as complicit in projects that threaten public health, democracy, and long-term stability. Such a strategy not only alienates Serbian citizens but also creates space for other global actors to step in and fill the void left by the EU's opportunistic policies. Citizens and focus group participants are concerned that the EU may adopt a similar approach to the entire Western Balkan region, thereby endangering its stability: "Rio Tinto threatens Bosnia and Macedonia too; we all need to fight to keep what we have", one participant explained.

Experts warn that Serbia's current economic growth model, driven heavily by foreign direct investment attracted through subsidies and public spending on large infrastructure and real estate projects, is unsustainable. A significant portion of the growth primarily benefits an "privileged elite" connected to the regime, without resulting in broader prosperity or sustainable competitiveness. As the former high-ranking government official put it, "much of Serbia's growth is driven by investments in construction and real estate benefiting an extractive class, which is not translating into better living standards for the average citizen." Public investment increasingly finances unproductive projects such as stadiums or expos rather than improving infrastructure or diversifying the economy. This is very clear to the citizens themselves, as one focus group participant contrasted the 0.6 percent cultural budget line with the multimillion-euro "EXPO" vanity projects, illustrating the misalignment of resource allocation. "This model of growth even if it doesn't bring us to a crisis soon is one that will deepen inequalities further and accelerate demographic decline because people will be leaving", clearly concluded former high ranking government official.

Labour rights abuses are widespread, affecting workers in Chinese, Turkish, Russian, and even European companies operating in Serbia. Weak enforcement of labour laws, poor working conditions, and political manipulation of public sector employment contribute to social instability. Migration and brain drain exacerbate demographic challenges, with skilled workers leaving and foreign labourers often brought under dubious conditions. Participants of the focus group with citizens described a vicious cycle in which skilled professionals leave because public services deteriorate, and public services deteriorate further because there are fewer skilled professionals to maintain them. Emigration reduces the tax base, they argued, increasing the temptation to accept easy foreign loans that mortgage future revenue streams. Several younger members of the group said they would prefer to build careers in Serbia if wages, rule of law and environmental standards improved, but they doubted that change would come soon without firmer EU conditionality.

Citizens, focus group participants, articulate these complex dynamics through lived experiences and in tangible terms: rising utility bills, polluted air, overcrowded hospitals and spikes in urban rental prices, the latter blamed on Gulf-funded real-estate megaprojects. Many respondents connected these experiences to foreign leverage over domestic elites. China was deemed responsible for pollution and debt, Russia for gas-price volatility and media sensationalism, the United Arab Emirates for gentrification that prices out long-standing neighbourhoods. Interestingly, some pensioners disputed Russia's negative portrayal, citing historically low gas prices and cultural affinity, suggesting that threat perception is deeply generational.

8.3.1. Factors of Resilience

Amid this panorama of risks, interlocutors identified key resilience factors anchored in Serbia's human capital and market geography. Resilience in the socio-economic domain is tied to three interrelated factors. First, legal and institutional reform—particularly in the areas of public procurement, environmental protection, and labour rights—is essential for levelling the playing field and attracting sustainable investment. Capacity-building projects supported by the EU have improved the functioning of some agencies but fall short of tackling entrenched political interference. Second, better integration into EU value chains, especially in technology-intensive sectors, could reduce Serbia's dependency on non-EU actors and create incentives for higher standards. Third, civil society's growing awareness and activism, particularly around issues like judicial reform corruption, and environmental protection, offer some hope for pushing systemic change. However, the government's control over media and public discourse remains a formidable obstacle in moving things forward faster and deeper. Finally, the Serbian diaspora represents a largely untapped reservoir of capital, talent, and global networks. Programmes that facilitate re-investment, streamline bureaucracy, and protect property rights could mobilise diaspora contributions toward high-value, community-driven development.

Economic diversification, improving labour standards, and increasing transparency in foreign investment and public procurement are seen as essential for long-term resilience. A clearer alignment with EU rules and standards, coupled with political commitment to reform, would improve Serbia's position as a reliable economic partner and reduce vulnerabilities to external political manipulation.

8.4. Political threats, opportunities and resilience

"The root of the problem is the support this government has from both sides… it hurts us more when the EU says Serbia is going in the right direction", expert from the focus group

The political-governance terrain emerged as the domain where respondents perceived the strongest convergence between internal weaknesses and external manipulation. Across the board, interviewees insisted that Serbia's single greatest strategic vulnerability is domestic: an executive that concentrates decision-making in a narrow circle around the Serbian President, Aleksandar Vucic, circumvents parliament, and diminishes the independence of media, judiciary and regulatory agencies. While not strictly a foreign threat, this structural condition is widely believed to create fertile ground for external actors seeking leverage. Citizens worried less about overt foreign meddling than about how international actors legitimise an "extractive" ruling coalition

Russia's role in political sphere was cited more frequently than any other external power. Practically almost every respondent identified Russia as the dominant extra-regional player shaping Serbian political life—not through formal vetoes but via pervasive soft-power narratives, disinformation and cultivation of sympathetic parties and movements. A security specialist at the embassy of an EU Member State observed that a decade of state-amplified pro-Russian propaganda has created "very receptive ground" for Kremlin messaging, deepening ideological polarisation and clouding consensus on EU accession. The representative of an NGO of the Muslim Bosniak minority in Serbia described concrete instances in which Russian-linked actors

orchestrated ethnic incidents in the multi-confessional and multi-ethnic Sandžak region to divert attention or generate leverage.

Experts described a symbiotic relationship in which the Serbian government maintains a degree of ambiguity regarding sanctions and security alignment, and Moscow, in exchange, refrains from weaponising its residual influence over energy or minority issues. Participants nonetheless worried that if Serbia were to tilt decisively toward the EU, Russia could deploy disinformation networks already embedded in Serbian-language media ecosystems, mobilise far-right groups with proven channels to Moscow, or exacerbate tensions in northern Kosovo to discipline Belgrade. "Russia doesn't need to invade. It just needs to talk through our own media, using our own language, and it already influences a large part of the population", explained economic journalist. Interestingly, citizens were less concerned about formal Russian investments—pointing out that Russia's capital stock in Serbia is limited outside the oil-gas sector—than about the saturation of pro-Kremlin narratives in pro-government tabloid outlets and social media influencers.

Interviewees disagreed, however, on Moscow's ultimate objectives and capabilities. Some argued that Russia lacks resources for sustained destabilisation and primarily seeks to block Serbia's Western trajectory at minimal cost, relying on local media to recycle its narratives. Others feared that the Kremlin—cornered in Ukraine—could exploit Serbia's open information space and far-right groups such as the "Night Wolves" to trigger unrest.

China's political footprint was interpreted differently. Specialists argued that Beijing avoids overt interference in electoral processes or identity politics, preferring to lock in long-term influence through contractual confidentiality clauses, preferential tax treatment and the normalisation of non-transparent practice. Several interviewees worried that this modus operandi cultivates a parallel legal order inside the Serbian economy, diluting the normative reach of EU acquis even before formal accession chapters are closed. Civil society analysts nonetheless cautioned that Chinese state-owned enterprises undermine accountability norms, encouraging executive discretion and thereby entrenching illiberal governance. No less important is the fact that these arrangements between China and Serbia enable extensive contacts between Chinese and Serbian politicians, businesspeople, and engineers, which can provide a strong foundation for Chinese influence in the political and economic spheres. Security specialist at the embassy of an EU Member State saw Beijing "plugging power into economic projects that then translate to soft power" but noted that its ideological imprint remains weaker than Russia's. Citizens were less conscious of legal nuances but recognised that high-profile projects such as the Belgrade Waterfront and the prospective metro grant Chinese firm's symbolic visibility that can be redeployed in elite bargaining.

Türkiye's influence operates primarily through cultural diplomacy and party-to-party ties, especially in Sandžak. Expert opinion diverged on whether this amounts to malign interference. Some political scientists contended that Ankara essentially provides Belgrade with a cost-free instrument of minority management, ensuring alignment of the Bosniak Muslim minority with Belgrade rather than with Bosnia and Herzegovina. He suggested that even figures like Muamer and Usame Zukorlić, as well as Sulejman Ugljanin from rival Bosniak political party, previously vocal about Bosniak autonomy, had been co-opted or neutralised in recent years due to this influence. Others argued Türkiye's clientelistic engagement reinforces pre-existing patronage networks and thereby undermines pluralistic democratic politics. What united both camps was

the view that Türkiye has neither the resources nor the strategic intent to derail Serbia's EU aspirations outright but rather seeks selective gains on business and symbolic leadership of Balkan Muslim communities. However, the representative of an NGO of the Bosniak minority in Serbia emphasises that Türkiye is indirectly undermining Serbia's path to the EU, as it strengthens the authoritarian status quo in Serbia, complicating alignment with EU political standards.

A separate strand of conversation centred on domestic governance. An economic journalist called the incumbent administration itself "the biggest threat", citing the concentration of power, media capture, and suppression of independent institutions; they argued that both Western and Eastern partners tolerate this model in the name of stability. Former high ranking government official warned of a growing readiness to use violence and paramilitary proxies against protestors, underscoring the fusion of internal repression and external legitimation. Several speakers underlined that such domestic fragilities are precisely what external actors exploit; the problem is therefore endogenous but internationally amplified.

Some of the interviewed experts also pointed out that the harmful convergence between internal and external factors is well illustrated by the phenomenon of so-called *institutional mirroring*, which involves the import of regulatory templates and procedural shortcuts that favour external actors. Analysts highlighted fast-track expropriation laws resembling Chinese precedents, accelerated environmental permitting processes modelled on Turkish industrial zones, and special-purpose vehicles for Gulf sovereign wealth projects governed by foreign arbitration clauses. Experts expressed concern that these frameworks remain in effect long after the completion of individual projects, gradually rewriting the rulebook in ways that dilute EU acquis standards and further distance and complicate Serbia's path toward EU accession. Experts we spoke with also highlighted the phenomenon of elite co-optation, which channels individual ambition and serves as a conduit for foreign (often malign) influence in Serbia. There are documented cases in which retired Serbian diplomats have taken on roles as lobbyists for Chinese state-owned enterprises, while former energy regulators now sit on the boards of subsidiaries linked to Gazprom. This revolving door encourages current officials to prioritise cultivating future private-sector opportunities over strict enforcement of regulations. Several interviewees described an opaque ecosystem of consultancy fees, speaking engagements, and research grants tied to major infrastructure projects, which in turn steer policy discourse in directions favourable to certain foreign benefactors.

8.4.1. Resilience factors

Participants converged on three principal lines of political resilience. The first is Serbia's residual plurality of media and civil-society actors, which, despite financial and legal pressures, continue to document illicit agreements, environmental mismanagement and labour-rights violations. The experts noted that investigative outlets and watchdog NGOs retain a degree of international support that shields them from outright closure and offers platforms for societal counter-narratives. Strategic litigation by civil-society organisations, though hampered by slow courts, occasionally forces selective publication of contract annexes or environmental-impact data, as exemplified by a 2024 Administrative Court ruling that compelled partial disclosure of metro-financing documents. The second source of resilience is Serbia's formal EU-accession framework, which obliges the government to engage, at least rhetorically, with benchmarks on rule of law and governance. For instance, incremental alignment with the EU's peer-review mechanism under Chapter

23 provides reform-minded judges with reference points that can be invoked to justify decisions expanding transparency. While many participants doubted the transformative power of EZ accession process under current political conditions, they still viewed the accession track as a scaffold that domestic reform coalitions can invoke. Otherwise, prolonged stagnation in EU negotiations was seen as the single factor most likely to magnify Russian and Chinese alternatives. The third potential buffer identified is the growing inter-parliamentary connectivity with EU Member States and certain NATO allies; although still modest, these contacts furnish Serbian MPs outside the ruling party with legislative know-how that may translate into incremental institutional gains.

8.5. Policy areas

Across interviews and focus groups with experts and citizens, there is a strong and recurring perception that the European Union holds a unique position which it could use in assisting Serbia to resist the growing influence of external actors, most notably Russia, China, and to a lesser extent Türkiye and the Gulf States. While views on the scale and nature of these influences vary, there is widespread agreement that the EU can play a far more active role in strengthening institutional resilience, improving governance standards, and reinforcing Serbia's alignment with European norms.

1. Military and security domain

One of the clearest areas where participants identified room for increased EU engagement relates to the governance of Serbia's security architecture. Interviewees expressed concern about the opacity of existing military and intelligence cooperation between Serbia and third countries such as Russia and China. These relationships have often bypassed the scrutiny of the oversight state institutions (e.g. parliament and its committees) and have relied on bilateral executive arrangements, raising questions about data-sharing, surveillance, and chain-of-command accountability. Several participants suggested that the EU should intensify its support for building democratic civilian oversight over the security sector. They argued that the EU should invest more in empowering independent oversight institutions such as parliamentary defence committees, anti-corruption bodies, and cybersecurity agencies, which currently lack the authority or political backing to challenge opaque foreign partnerships. A security expert emphasised that the EU's ability to insist on standards of transparency in defence procurement, data protection, and intelligence-sharing could help reduce space for informal or politically motivated security alliances with authoritarian states. EU support for institutional reforms in the security sector, particularly in boosting parliamentary oversight and transparency, were mentioned as a key area where assistance could limit the space for informal influence.

EU assistance in cybersecurity was also mentioned, with several experts calling for more direct technical and strategic cooperation. Participants proposed that the EU support the development of secure national digital infrastructure and protocols for information handling in public institutions in line with EU norms. They also recommended EU-backed training for cybersecurity professionals and judges dealing with digital rights, particularly as foreign actors increasingly exploit Serbia's digital vulnerabilities to entrench influence. It is equally important that EU monitors how surveillance tools are used, especially during public protests, as there were cases of politicaly motivated missuses in the recent past.

Increased NATO-EU coordination—short of full membership—was also seen as a valuable channel for keeping Serbia aligned with regional security standards. Experts noted positively the symbolic presence of EUFOR and KFOR but argued that the EU could do more to integrate Serbian institutions into regional security dialogues, exercises, and long-term resilience planning without demanding a formal security realignment that would be politically unsustainable domestically. Security specialist at the embassy of an EU Member State —emphasised that EU-led joint exercises, crisis response training, and security cooperation could offer Serbia an alternative pathway for strengthening resilience without alienating domestic constituencies.

2. Socio-economic domain

The socio-economic domain was repeatedly highlighted as the principal area through which third countries, particularly China, exert influence in Serbia. There was broad consensus that Chinese companies have gained privileged access to Serbian markets through state-to-state agreements that circumvent public procurement laws, enforce low labour standards, and undermine environmental regulations. These deals were described as non-transparent, poorly monitored, and heavily dependent on political patronage.

Participants expressed the view that the EU is uniquely positioned to counteract these trends by pushing for the universal application of EU standards in all investment and procurement processes in Serbia —regardless of funding source. Several interviewees and focus group participants suggested that the EU should make future financial support conditional not only on project-specific standards, but also on systemic alignment with EU-wide procurement, labour, and environmental norms across all infrastructure projects. In doing so, the EU could limit the political space for Chinese and other non-European actors to secure exclusive contracts through executive deals that lack public scrutiny.

Experts and business representatives called on the EU to assist in levelling the playing field for both domestic and European companies. They noted that many EU-based firms avoid bidding in Serbia due to the perception that Chinese firms receive preferential treatment and operate outside established tendering procedures. EU institutions were encouraged to intervene diplomatically to ensure fair competition and to expand mechanisms for monitoring tender compliance and market access conditions for EU companies operating in Serbia.

Moreover, many interviewees advocated for a stronger EU role in supporting local governments and municipalities to resist centralised, politically driven infrastructure priorities. EU support for bottom-up development initiatives—particularly in green energy, circular economy projects, and social services—was seen as a critical counterbalance to top-down, extractive investment models imported from China and the UAE. Finally, EU should link economic support to social inclusion, especially in neglected rural areas. Citizens mentioned cases of where EU-funded restorations of cultural sites had failed to produce broader socio-economic benefits for local populations due to a lack of accompanying investments in education, tourism, and employment.

3. Political domain

Politically, participants widely affirmed that the EU can play a critical role in pushing back against the normalisation of illiberal practices linked to third-country influence. Many described the relationship between local political elites and Russia or China as one based on mutual strategic convenience. In this

context, the EU was seen as the only actor with the institutional clout to credibly demand that Serbia adhere to standards of media freedom, judicial independence, and democratic competition.

Several interviewees noted that while the EU had historically offered rhetorical support for reforms, it had failed to insist on meaningful implementation. There was a perception that the EU has at times enabled democratic backsliding by prioritising short-term political stability over rule-of-law benchmarks. To reverse this, participants called for the EU to deepen its support for civil society watchdogs, investigative journalism, and independent regulatory agencies that are currently marginalised or under threat.

Focus group participants and civil society actors recommended that the EU scale up funding for citizen-led accountability initiatives, particularly at the local level. They called for increased investment in civic education, legal empowerment projects, and local participatory budgeting—all seen as tools to increase public resilience to disinformation and elite capture. Respondents also proposed that the EU support institutions tasked with monitoring foreign influence in political campaigns, media ownership, and party financing.

A recurring suggestion was that the EU should exert more visible pressure on Serbian authorities to apply existing laws fairly and consistently, particularly in areas like environmental protection, taxation, and urban planning—where third-country investors are perceived to routinely violate regulations. Participants asked the EU to be bolder in confronting government complicity in these violations, including by conditioning financial assistance on compliance with domestic and European legal frameworks.

Beyond technical and regulatory engagement, many interlocutors emphasised the importance of the EU reclaiming its narrative in the public discourse. There was a prevailing sense that third-country actors, particularly Russia, had been more adept at speaking to popular sentiments and exploiting existing grievances through media and symbolic gestures. While the EU's material support for Serbia was widely acknowledged, many participants lamented the lack of effective communication about how and why the EU is contributing to Serbia's development.

Experts, journalists, and citizens alike encouraged the EU to invest in strategic communication that resonates more with the everyday concerns of Serbian citizens. They suggested the EU focus less on promoting its bureaucratic frameworks and more on highlighting tangible benefits to health care, education, cultural heritage, and youth employment—areas where participants recognised that EU support had made a real difference. Visibility campaigns were seen as particularly important in rural and economically marginalised areas, where anti-EU narratives tend to be strongest.

There was also interest in expanding people-to-people exchanges and EU-funded mobility programmes, which were described as powerful tools for building trust and reducing the cultural and emotional appeal of authoritarian alternatives. Several interviewees proposed expanding Erasmus+, cultural grants, and town-twinning initiatives to build durable grassroots linkages between Serbian and EU communities.

In addition, cultural diplomacy was mentioned as a neglected area where the EU could do more. Participants noted that actors like China and Türkiye had successfully used cultural centres, festivals, and targeted funding to build goodwill among Serbian citizens. The EU was encouraged to replicate such models, working in

partnership with local civil society, artists, and educators to promote European values in ways that are embedded in community life.

8.6. Conclusion

Serbia's threat landscape in 2025 is defined less by conventional warfare and more by a multifaceted crisis of governance, systemic corruption, and external influence—challenges deeply rooted in domestic fragilities and exacerbated by global geopolitical rivalries. While citizens and experts do perceive external threats—especially from Russia, China, and Türkiye—the prevailing sentiment is that Serbia's greatest vulnerabilities lie within.

In that regard, across the board, respondents saw no immediate military threat to Serbia. Even seasoned defence experts described "classical military threats" as largely rhetorical devices employed by the ruling elite to foster political cohesion. Instead, hybrid pressures dominate: cyberattacks on critical infrastructure, disinformation campaigns, and the infiltration of national security systems through opaque defence and intelligence cooperation with Russia and China. Although war is unlikely, "calibrated instabilities" defined as manufactured or opportunistically amplified incidents and crises, especially in border regions and minority-populated areas, are very likely. Such (armed) incidents have already occurred, and in the current domestic, regional, and international political landscape, they could happen again. These incidents do not escalate to war but disrupt normal life and attract international media attention. However, they spoil interstate relationships in the region and reconciliation among peoples, and fuel nationalistic sentiments, stalling Serbia's progress to EU membership.

Within hybrid threats, cybersecurity, in particular, emerged as a domain of acute concern. Serbia's dependence on outdated systems makes it a conduit for malign cyber activity in the region. Incidents in early 2025—targeting an electricity distributor, a municipal utility, and a university data centre—highlighted the risks. Although no permanent damage was reported, analysts agreed the threats reflect coordination by state-linked actors and reveal institutional unreadiness to mount effective defences.

Citizens and experts diverged on the security resilience, as the former saw Serbia's military neutrality—an enduring policy supported by much of the public— as a stabilising force. Experts, however, emphasised that Serbia's participation in NATO's Partnership for Peace and the continued presence of EUFOR and KFOR in the region restrain escalation and reassure international partners.

The socio-economic domain is where perceptions of threat crystallise most sharply. Citizens and analysts alike pointed to a predatory growth model characterised by crony capitalism, extractive infrastructure deals, and fiscal mismanagement. This model, rooted in the concentration of political power in the presidency, rewards loyalty over competence and thrives on opaque public-private partnerships with China, the UAE, and Türkiye. China, in particular, plays an outsized role. Its "iron friendship" with Serbia has translated into billions in infrastructure contracts awarded without tender, undermining EU norms and facilitating exploitative labour and environmental practices. Serbia's exports to China largely consist of raw materials—especially copper—while imports flood the market with cheap goods, contributing to a ballooning trade deficit and environmental degradation.

Meanwhile, European companies increasingly view Serbia as an unreliable partner. EU-based investors have withdrawn or frozen up to 20 % of planned contracts since 2022 due to fears of political interference, poor legal protections, and geopolitical ambiguity. This trend threatens Serbia's future competitiveness and technological integration into European value chains. Perhaps most striking is the sense of disillusionment and economic fatigue among citizens. Youth emigration, a shrinking skilled labour force, and rising inequality are feeding a slow-burning social crisis. Public resentment is sharpened by conspicuous state spending on vanity projects like Expo 2027 and football stadiums, which stand in stark contrast to underfunded healthcare, education, and cultural institutions.

Politically, Serbia is described by respondents as a captured state—one in which decision-making is concentrated in the executive, oversight mechanisms are weak or absent, and democratic institutions are hollowed out. The EU's role, paradoxically, is double-edged: seen both as the only credible external force for reform, and as complicit in democratic backsliding due to its prioritisation of regional "stability" over democratic accountability.

Russia's influence here is more ideological than economic. Pro-Kremlin narratives saturate Serbian media, especially pro-government tabloids, while Moscow cultivates far-right groups and leverages regional proxies like Republika Srpska to pressure Belgrade from within. This form of "calibrated instability" is carefully managed, designed to prevent full Serbian alignment with the EU without triggering overt conflict. China's political model is subtler but equally corrosive. Through preferential agreements, investor protections, and regulatory exemptions, Beijing has helped institutionalise a parallel legal order that bypasses European standards and reinforces executive discretion.

Despite these pressures, political resilience remains. Serbia's civil society retains vitality, particularly in its watchdog and environmental sectors. Investigative journalists and legal advocates continue to expose wrongdoing, sometimes with international backing. The EU accession framework, though weakened by stalled negotiations and wavering domestic commitment, still offers legal benchmarks and political scaffolding for reformist actors to m The clearest message from this report is that Serbia's trajectory remains open-ended.

While internal decay has intensified, there is still a window of opportunity for democratic renewal and economic transformation—particularly if the European Union recalibrates its approach. Stakeholders emphasised the need for several strategic shifts. First, they highlighted the importance of applying stronger conditionality, linking EU assistance directly to structural reforms in areas such as public procurement, environmental protection, and labour rights. Second, they recommended a more visible engagement by the EU, suggesting that EU-funded projects—especially in marginalised regions—should be actively showcased to counter anti-European narratives. Another critical issue is fair competition; the EU should challenge Serbia's preferential treatment of Chinese and Gulf investors, which distorts the economic playing field. Additionally, stakeholders underscored the necessity of scaling up support for civil society, both through increased funding and stronger legal protections for watchdog organisations and independent media. Finally, they called for a shift in public narrative: the EU must reclaim discourse by clearly linking its contributions to tangible improvements in citizens' everyday lives.

The next few years are crucial and will test whether Serbia can reverse its democratic erosion and realign with European standards—or whether the current model of controlled pluralism and external balancing will solidify into long-term semi-authoritarianism. In either scenario, the EU's actions—or inaction—will play a defining role.

8.7. References

8.7.1. List of interviews

Interviewee Code	Affiliation	Place and Date
RS01	Civil society analyst	Online, 17/12/2024
RS02	Military analyst	Online, 24/12/2024
RS03	Two business association representatives	Belgrade, 28/03/2025
RS04	Two experts from an international organisation	Belgrade, 28/03/2025
RS05	Bosniak minority NGO representative	Belgrade, 19/12/2024
RS06	Foreign policy expert	Online, 31/03/2025
RS07	Defence analyst	Belgrade, 28/03/2025
RS08	Energy transition expert	Belgrade, 28/03/2025
RS09	Security specialist from an EU Member State embassy	Belgrade, 28/03/2025
RS10	Former high ranking government official	Belgrade, 28/03/2025
RS11	Economic journalist	Belgrade, 02/04/2025
RS12	Civil society anti-corruption expert	Online, 30/12/2024
RS13	Academic researcher of Serbia-China relations	Belgrade, 28/03/2025

RS14	Academic researcher of energy security	Online, 25/12/2024
RS15	Trade-union association representative	Belgrade, 28/03/2025

8.7.2. Focus Group Discussions

Focus Group Discussion	Group	Place and Date
Focus Group Discussion with experts	Experts from academia, civil society, and media	Belgrade, 28.03.2025
Focus Group Discussion with citizens	Miscellaneous	Belgrade, 31.03.2025

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9. UKRAINE

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9.1. Introduction

This report offers an in-depth assessment of local perceptions of external actors and their influences as well as of threats in security, military, socio-economic, and political domains and points of mitigation and resilience in Ukraine, drawing on the perspectives of Ukrainian stakeholders and experts across different institutions, media, civil society, and academia as well as general public. The analysis of these local perceptions is grounded in the empirical fieldwork collected in March-April 2025 as part of the REUNIR Work Package 6 (WP6) and informed by the mapping of relevant public opinion polls and surveys of local perceptions and positions in Ukraine undertaken in July-December 2024 and presented in the D6.1 (Pollozhani, et al., 2024). Moreover, the 2024 REUNIR WP6 mapping identified broader regional dynamics across the Western Balkans and Eastern Partnership countries (EN3: Georgia, Moldova, and Ukraine).

This present analysis aims to examine the interplay between perceptions of external and internal challenges and influences Ukraine is facing currently and within the next five-year period, with a focus on those related to military and security realms, democratic processes and governance and socioeconomic development as well as to civic engagement and societal resilience, particularly within the frameworks of its EU accession process and common European security.

Within an EN3, Ukraine represents a unique case of a country that has been opposing first a hybrid (since 2014) and then a full-scale (since 2022) Russia's aggression and fighting an active warfare while sustaining its democracy and its European and Euro-Atlantic aspirations in its everyday practices, institutions, and values. For the last three years, Ukrainian society demonstrated remarkable resilience in different areas, both on the institutional level and on the level of grassroots civic initiatives, despite challenges of full-scale warfare, destruction, and martial law and war economy. As was demonstrated in mapping in D6.1, Ukrainians are united in their perceptions of external actors as well as in their aspiration for EU membership for Ukraine.

In February of 2022, on the third day of the full-scale invasion of Russia, Ukraine applied for EU membership and was formally granted candidate status in June 2022. Following the European Council's decision and European Commission assessments, the accession negotiations for Ukraine were formally launched on 25 June 2024. On 20 May 2025, Marta Kos, European Commissioner for Enlargement, announced that Ukraine completed the screening of three negotiation clusters for EU accession talks: "Ukraine has done its homework, so it's ready for Cluster 1 Fundamentals to be open. And now the Council will have all the elements to make a decision. Last week, we sent two other screenings to the Council – Cluster 2 and Cluster 6 for both countries, Ukraine and Moldova" (Vysotska & Balanchuk, 2025). It has also been said that with the current speed, all screenings could have been processed by autumn 2025. It is a widespread understanding

that Ukraine's integration into the EU is vital not only for the future and security of Ukraine but also for the future and security of Europe and the European Union.

The fieldwork conducted in Ukraine in March-April explores the double role of external actors as sources of threats and challenges and as enablers and contributors of transformations, development, and sustainability. Thus, the report aims to contribute to an empirically grounded and context-sensitive understanding of Ukraine's relations with external actors and comprehensive mapping of threats, risks, opportunities, and points of resilience it is experiencing currently and within the foreseeable future. In the centre of our analysis are the local voices and perceptions, drawing upon which the propositions for coherent, inclusive, and sustainable policies to address threats and vulnerabilities as well as opportunities Ukraine is facing are formulated for international partners and national stakeholders. Key strategic policy areas and opportunities as well as challenges for foreign and EU's support are discussed to strengthen Ukraine's resilience and social cohesion as well as Ukraine's and common European security.

This report is structured around two main sections. Following the introduction and the methodology, the first section examines the broader contextual landscape and expert and stakeholder perceptions of external actors, threats, and points of resilience across three thematic areas: (1) military and security threats and opportunities for resilience; (2) socio-economic vulnerabilities and adaptation strategies; and (3) political risks and points of resilience, including their institutional and civic engagement aspects. The second section offers an analysis of strategic policy areas where external support–mainly the EU's–can be directed. Each section builds upon the mapping exercise published in D6.1 and is based on the qualitative insights from expert interviews and focus groups, illustrated with relevant quotes which reflect perceptions and experiences of local actors from diverse perspectives.

9.1.1. Methodology

This report draws upon the qualitative fieldwork conducted in Ukraine in March-April 2025 under the REUNIR project with experts, stakeholders, and the general public. The research aimed to assess the local perceptions of external actors and influences as well as security, military, socioeconomic, and political threats and points of resilience affecting Ukraine currently and within the five-year perspective. Methodological design of the qualitative fieldwork triangulated the findings by combining semi-structured interviews and focus group discussions and expert and non-expert perspectives. Our methodology ensured representation of experts and stakeholders across professional sectors–civil society, media, business, academia, public service and representation on societal levels (experts and citizens). The diversity of respondents and the open-ended format of questions allowed for the emergence of unexpected themes and nuanced insights into Ukraine's societal dynamics and local opinions and perceptions, including grassroots.

The semi-structured interviews and focus-group discussions were guided by common sets of questions regarding perceptions of external influences, threats, resilience, and mitigating opportunities across security, political, and socioeconomic domains. They followed the standardised REUNIR WP6 interview and focus group guides as relevant. Several questions were also aimed at discussing how the EU could help to mitigate threats and facilitate Ukraine's resilience within these realms.

All research activities were conducted in strict accordance with REUNIR's ethical guidelines. Prior to the interview or FGD, participants were informed about the voluntary nature of their involvement, their right to confidentiality, and their rights as participants, including the right to withdraw or refuse to answer specific questions. They were also informed briefly about the REUNIR project, its funding under the Horizon Europe programme, the purpose of the data collection, and data protection measures. Consent for recording the interviews was obtained on record from each participant. All interviews and focus group discussions were transcribed and translated into English (when necessary) for thematic analysis. Where explicit consent for full attribution was granted, quotations are cited with names. Otherwise, references are anonymised and described by institutional affiliation or role.

Due to the ongoing security situation in Ukraine and according to the risk management plan, all but one interview and both focus group discussions were conducted online. These ensured both the safety of all participants and uninterrupted conversations in case of air sirens and drones/missiles attacks.

Nine (9) semi-structured interviews were conducted in March-April 2025. Participants were selected for their thematic and institutional expertise in areas such as politics, foreign affairs, military, security, economy, civil society, academia, and media. Interviewees included public officials, including members of parliament, ministries and government officials, academics/analytics and civil society experts. Each interview lasted between 35 and 80 minutes and was audio recorded with the participant's consent. Interviews were conducted in either Ukrainian or English based on each participant's preference.

To complement insights from expert interviews and ensure broader societal representation, two focus group discussions were conducted with a total of sixteen (16) participants in March 2025 online. The first focus group discussion (Focus groups with experts) was conducted in English and included Ukrainian experts and activists from civil society organisations, media, academia, and public institutions. Professional, institutional, and field diversity provided a rich foundation for multi-angled perspectives on security and military issues, democratic engagement, societal and political aspects and processes. The second focus group discussion (Focus group general) was conducted in Ukrainian and featured a diverse range of citizens of different socio-demographic backgrounds (region, education, age, gender, profession, ethnicity etc.). Both focus group discussions lasted around 100-120 minutes and were recorded in Zoom.

The detailed information on participants of interviews and focus group discussions is provided in the table below:

Country	Interlocutors	Number (interviews)	Number (FGs)	Number total
Ukraine	Academia	1	3	4
	Civil Society	7	6	13
	State Institutions			

Political Parties	1	1	2
Other (specify)		6	6
Crimean Tatar		1	1
Women	1	7	8
Men	8	9	17
Total	**9**	**16**	**25**

9.1.2. Context

All the interviewees share a central theme: the understanding that Russia currently represents the primary threat not only to Ukraine's security but also to its democratic and economic development. The hybrid war unleashed by Russia in 2014 and the full-scale invasion in February 2022 have caused a cascade of derivative challenges — military, socio-economic, and political. As one of the experts reflected on the main threat for Ukraine, "[It is] Russia, because we are now in the state of the ongoing Russian aggression since at least 2014, and obviously full-scale invasion in 2022. But even before, if you look at the history of Ukraine throughout centuries and then decades of independent Ukraine, Russia has been the main threat" (UA07, 2025).

According to respondents, the very nature of this war is existential. Thus, some see it aimed at turning Ukraine into a "dysfunctional" state, using a combination of hybrid and hard-power methods (Focus group with experts). Russia also systematically targets Ukraine's civilian infrastructure, destroying houses, power plants, schools, hospitals, and cultural sites. The full-scale invasion of Russia against Ukraine led to significant migration within and out of Ukraine, heightened demographic crises and reshaped the structure of Ukraine's economy, workforce, and budget. With Ukraine's own resources mainly going to financing its defence and a significant part of its population serving or being employed in the defence sectors, the country became dependent on international macroeconomic support from its allies and partners.

Meanwhile, debates within the United States regarding the scope and nature of its military aid to Ukraine raise the risk of U.S. support being interrupted. Included here are also weapons maintenance, intelligence sharing, and other forms of assistance. "We are living in a world in transition, that demonstrates that we can't take for granted issues like U.S. continued support" (UA03, 2025). Donald Trump's foreign policy also presents a challenge for Ukraine, due to its inconsistency and propensity to pressure Kyiv into potentially dangerous concessions during peace negotiations or into accepting unfair economic arrangements. More broadly, according to the experts' opinions, voiced at the focus group, current U.S. actions on the world stage are exacerbating international turbulence, deepening the erosion of international law that began with Russia's invasion of Ukraine, and contributing to a general decline in belief in democratic values. This, in turn,

negatively affects international security alliances, including NATO. As one expert remarked, the moment the U.S. abandoned its role as a global geopolitical leader, the world lost its "policemen" (Focus group with experts).

Against this backdrop, the European Union is viewed by many respondents as a potential guarantor of security commitments in the medium term. However, experts expressed concern over the EU's slow response, excessive bureaucratic processes, and lack of quick coordination, decision-making and flexibility. Some experts noted that the EU currently lacks the capacity to replace the scale of assistance provided by the United States, while there is an urgent need for that (Focus group with experts).

One of the concerns for the respondents is that the internationally popular and populist discourse of peace negotiations poses a serious risk for Ukraine. Any peace agreement that lacks firm guarantees would be potentially paving the way for renewed Russian aggression. "Unjust ending of this war or a constant threat with Ukraine not being able to provide for its own security and not having these security guarantees or support of its partners would lead to a more inward-oriented, securitised, militarised type of society. And that's definitely not what we want to have" (UA07, 2025).

Respondents were also asked to discuss domestic political threats in the next decade. Respondents reflected on the global rise of populism as a concern and the importance of just peace and a smooth EU accession process for Ukraine's integration as prerequisites for its stable political and democratic development. Experts also commented on the threat and mitigation of Russia's disinformation campaigns and soft power, post-war electoral processes, and resilience of Ukraine's civil society and media. A failure to ensure an orderly transition to postwar democratic governance risks intensifying political turbulence: "[The] major problem [after war] would be to create [a] self-sufficient system that would guarantee both its own security to the fullest possible extent, and simultaneously guarantee economic, social, and political development" (UA03, 2025).

9.2. Military threats, opportunities and resilience

9.2.1. Military and security threats

Ukraine is currently in the midst of the full-scale war with Russia, which frames the nature and perception of military threats Ukraine faces. Russia has long been perceived as a threat to Ukraine but, since the start of the war in 2014, the hybrid and military aspects of these threats materialised, thus triggering dramatic reframing and changes in risk and threat perceptions of Ukrainians. Now, three years after Russia's full-scale aggression against Ukraine, the discussion of military threats it poses should be split into a discussion of ongoing threats or rather ongoing warfare and potential threats/risks.

Since at least the beginning of the war in 2014, Russia has been perceived as an existential threat to the very survival of Ukrainian statehood. Moreover, since the collapse of the Soviet Union in 1991, Russia's foreign policy towards Ukraine and its neighbourhood has questioned their subjectivity and sovereignty as well as their (particularly, Ukraine's) rights to their own statehood and has been performed from the imperialist/hegemonic perspective. The majority of experts agreed that Russia's goals in its war against Ukraine were well beyond mere "demilitarisation and denazification" or "protection of Russian speakers"

(Fisher, 2022). As one expert assessed, "that is the goal precisely of Russia, to basically turn Ukraine into a dysfunctional state" (UA03, 2025). The real objective is Ukraine's occupation with destruction of Ukraine's sovereignty and statehood: "Maybe some of our friends and neighbours think differently. Some of them believe Russia just wants to take some territories or influence Ukrainian internal and foreign policy, change the language situation, culture, history, etc. But in reality, this is an imperialistic revanche by the Russian leadership — and not only the leadership" (UA01, 2025).

There is a strong belief among all respondents that the military threat does not originate solely from the Russian leadership— Putin—or from Russian elites. Rather, the ideology of imperialism and revanchism is seen as embedded in the broader Russian society. "Russian ruling elite and Russian population… either passively or actively participate in the aggression of the country, which makes us presume that whether Putin or not is leading them, aggression will continue" stated one of the experts with knowledge on international relations (UA08, 2025). Furthermore, experts argue that the threat of renewed large-scale hostilities will persist even in the event of a ceasefire, frozen conflict, or peace agreement unless there is a special effort to dismantle such mindsets and sentiments. Thus, all our respondents agreed that Russia is not to be trusted to uphold any peace or ceasefire agreement and would use any such opportunity to accumulate and consolidate resources and to prepare for a new offensive military operation. Moreover, experts stressed that the ceasefire negotiations could let Russia exploit some issues, like the Zaporizhzhia Nuclear Power Plant, to pressure Ukraine and its allies (UA01, 2025).

Some experts also expressed concerns that one of the risks for Ukraine lies in the inability of its allies to adopt a firm stance toward Russia and to compel it to peace through substantial assistance to Ukraine. One expert noted that "People simply cannot imagine the world without Russia and they're saving it" (UA08, 2025). As a result, there is a risk that Ukraine may be denied the security guarantees it needs after the ceasefire to sustain a lasting, just, and durable peace. Under such conditions, experts warn, Russia could benefit from the easing of sanctions and resuming of trade, thereby amassing military resources for a renewed aggression: "a major political threat is this frozen conflict, gray zone, where Russia feels absolutely comfortable operating in between, when there would be attempts to normalise relations with Russia, to lift or to ease sanctions on Russia, to engage with the Russians in certain areas… And that will be a political threat both for Ukraine and for the EU and NATO" (UA07, 2025).

9.2.2. Regarding the ongoing warfare with Russia

At the current stage of active warfare, the key security and military threat is Russia's continued albeit slow advance on the battlefield and the potential further occupation of Ukrainian territory—particularly the Luhansk, Donetsk, Zaporizhzhia, and Kherson regions, which were illegally incorporated into the Russian Federation at the constitutional level. Russia also systematically uses long-range weapons—missiles and drones—on a massive scale targeting civilian and critical infrastructure, including power plants and energy transformer stations (International Partnership for Human Rights; International Human Rights Clinic at Harvard Law School, 2025). While such attacks continue regularly, they were especially extensive in 2023-2024. These strikes have also been targeting Black Sea port infrastructure, posing a threat to Ukrainian exports (UA04, 2025).

Russia is also conducting hybrid and cyber operations against Ukraine and its allies, particularly the EU. It is important to note that these operations target not only the infosphere and are not limited to political domains, but also target critical infrastructure, particularly energy (power plants, transformers, distribution controls, etc). Furthermore, Russia is using other countries or territories as its proxies and place d'armes for threatening Ukraine. Most notably, Belarus and Transnistria. While neither represents the military threat to Ukraine *per se*, their territories and resources are exploited and employed by Russia to divert Ukraine's attention and stretch its resources.

For example, one expert noted about Transnistria: "[It] still is a threat. Because a lot of Russian forces… a lot of Russian agents are moving through this border between Transnistria and Ukraine in the Odesa region" (UA01, 2025).

According to Ukrainian security experts, Belarus's state sovereignty—within the framework of the so-called union state and Lukashenka's dependency on Russia—is severely limited, with its national policy largely under Moscow's control. Belarus is thus viewed as a satellite of the Russian Federation: "From a military point of view, it's absolutely clear: the Belarusian Armed Forces are under the control of the Russian General Staff. The territory of Belarus is effectively under joint control of the Belarusian and Russian general staffs, along with Russian secret services" (UA01, 2025). Another expert said: "Belarus… is a sword, which has been raised over Ukraine's head but has not been levelled down yet, and I expect Belarus to be used by Russia on a bit later stage of a Russian-Ukrainian war" (UA08, 2025).

Thus, such threats from Belarus' territory compel Ukraine to divert considerable military reserves to guard the Ukraine-Belarus border. For example, for a Russian–Belarusian joint military exercise *Zapad-2025,* the military contingent of over 15,000 troops has been accumulated on Belarusian territory. According to a Ukrainian defence expert, if scaled up to 50,000 personnel, there could be a risk of a renewed military strike on Kyiv and Chernihiv—like in 2022 (UA01, 2025).

9.2.3. Regarding potential threats/risks from Russia

In addition to conventional weapons, some experts mention the ever-present threat of nuclear weapon use: "it is not just a threat for rocket attacks and just military actions, but also a great nuclear threat from Russia, which is constantly threatening Ukraine to use its nuclear weapon against us" (Focus group with experts).

One of the defence experts mentioned another potential threat connected to the interpretations and terms of the potential ceasefire agreement and the regime of naval passage through the Bosporus and Dardanelles Straits (governed by the Montreux Convention and administered by Türkiye). If there is a ceasefire agreement that could be interpreted in the way that would allow to argue that Türkiye no longer have legal grounds to block the transit of Russian warships, it would enable Russia to reinforce its naval presence in the Black Sea by transferring military vessels from its other fleets (Northern, Baltic, Pacific) (UA01, 2025).

Experts also mentioned other external actors as those that may present threats to Ukraine. Most notably, as one expert put it, the threats are stemming from the countries of the so-called "axis of evil"—due to their cooperation with Russia. "This is Iran, North Korea, and to some extent China, because China is always working for itself" (UA09, 2025).

There is a unanimous perception among experts and all our respondents of Iran and North Korea (DPRK) as external actors threatening and opposing Ukraine while aiding Russia with drones and missiles (Iran) and ammunition, missiles, and personnel/troops (North Korea). At the same time, their views on whether China poses a direct military threat to Ukraine vary. On the one hand, some experts claim that since the start of Russia's full-scale invasion, China has established production and supply channels for ammunition, mines, and other lethal equipment for Russia: "from the military point of view… China is creating a threat by supporting North Korea, Russia, and Iran to produce all of these — weapons, ammunition, technologies, everything" (UA01, 2025).

China also aids Russia by helping to bypass Western sanctions and import components and double-purpose products. Similarly, China supports North Korea by supplying components for military equipment, thereby aiding a regime that poses a direct threat to Ukraine (Buderatskyi & Romanenko, 2024). Also, there have been cases of Chinese soldiers being taken as POW by Ukrainian forces in 2025 (Carey & Butenko, 2025). Both countries could also serve as secure storage sites for weapons — beyond the reach of Ukrainian drone strikes: "if a warehouse with ammunition in Taganrog or the Engels airport can be hit by Ukrainian aviation drones or missiles, then the warehouse under Pyongyang will not be reached by the Main Intelligence Directorate (ГУР) or the Drones Forces" (Focus group general).

On the other hand, there is also a perception among some experts of China as a neutral actor acting pragmatically in its own interest and not necessarily posing a military threat to Ukraine: "The only red line China wants Ukraine to follow is about Taiwan. If Ukraine follows the Taiwan issue, there will be no threat from the Chinese side" (Focus group with experts). Also, as our experts and respondents observed, many components used in Ukrainian drones and related devices and equipment are sourced from China.

Experts also said that one of the most significant military threats is the potential cessation of Western military support to Ukraine—particularly from the United States. This includes intelligence sharing and operational support for the F-16s without which their Ukrainian pilots may become increasingly vulnerable: "… they stopped support for the electronic warfare suites for the F-16s—and it's the sole defence for F-16s, for Ukrainian pilots. Thus, it's an open window of opportunity for Russian pilots and Russian air defence to kill Ukrainian F-16s" (UA01, 2025). The possible negative effect on Ukraine from the weakening of the US sanctions against Russia was also mentioned by experts (Focus group with experts). Furthermore, the Trump administration and its policies are perceived as a threat—primarily due to its ambiguous position towards Russia and Putin. Such policies might hinder Ukraine's ability to plan its wartime strategy (UA07, 2025). Also, several experts noted that the Trump administration risks undermining traditional security alliances, most notably threatening U.S. withdrawal from its defence commitments to its NATO allies (Focus group with experts). Such fragmentation of the West poses a broader threat to Ukraine by reducing the predictability of future support as well as a threat to the EU's security and the global geopolitical order.

9.2.4. Resilience to ongoing and potential military and security threats and opportunities

According to experts, the main sources of Ukraine's resilience in confronting Russia's war of aggression and full-scale invasion have been the effectiveness of horizontal ties within society, people's solidarity and

collective action most notable in the volunteer movement, their readiness to fight the aggressor against all odds, durability of key national and local institutions, and creativity (military, engineering, etc). The latter is of particular importance as the creative development, design, and usage of new technologies and tactics as well as "out of the box" special operations allowed Ukraine to compensate for the absence of heavy military equipment and conventional weapons and gain leverage on Russia.

One of the experts also mentioned the successful deployment of territorial defence units in February 2022, particularly in regions where they had been actively developed since 2015, often in cooperation with partners like the Estonian *Kaitseliit*: "the greatest illustration is in northern oblasts during February–March of 2022. Because of the strong territorial defence. Compared to, like, Kharkiv—very strong territorial defence since 2015—in Kyiv, in Chernihiv, Sumy region… I participated in some activities with Sumy in 2016… with Estonian Kaitseliit" (UA01).

Experts noted that currently, Ukraine lacks the necessary resources to liberate all of its occupied territories — particularly when the full and continuous U.S. support is in question. Some experts said that even then such objectives should be aided by changes in Russia, such as internal regime collapse or a severe political or economic crisis, thus Ukraine must be alert to them: "it could be a situation when the economical crisis in Russia, kind of turbulence in leadership after Putin, so Ukraine could open this question: just give our territories back. And maybe it will be a decision to de-occupy it by military force" (UA01, 2025).

Still, experts and respondents agree that currently, Ukraine should focus on building its own military capacity. First, this requires closer cooperation with European and other Western allies. Second, it also should be achieved by strengthening ties with, which views Russia as a threat in the Black Sea and whose strategic interest of containing Russia in this region aligns with Ukraine's and the EU's interests: "I see this NATO plus Ukraine in the Black Sea as part of the future European security. And I see this growing cooperation, especially in defence industries between Türkiye and Europe, to strengthen European security in the future" (UA07, 2025).

9.3. Socio-economic threats, opportunities and resilience

9.3.1. Socio-economic threats

Reflecting on the socio-economic threats to Ukraine, both the interviewees and focus group participants agree that most perils are derivatives of the military threats, particularly the ongoing Russian full-scale invasion, and depend on the course of military developments as well as post-war conditions. The postwar period will be challenging for Ukraine and will require the government to implement coherent policies on reconstruction and recovery, resolve the demographic issues, reintegrate those who will return from abroad and people from the de-occupied territories, implement veteran policy and so on. Ukraine's success in economic development and addressing the wide spectrum of postwar socio-economic challenges will largely depend on whether credible security guarantees are in place: "If Ukraine's security and sovereignty…are not guaranteed properly – there will be no development, no one will invest in Ukrainian reconstruction, foreign entities will be hesitant to come here with money, with people, with technologies" (UA03, 2025).

First, the war has triggered complex demographic challenges—from the mass internal displacement since 2014, outflow of Ukrainian citizens abroad during the full-scale invasion and the risk that many of them will not return after the active warfare phase ends to Russia's abduction of Ukrainian children from the occupied territories. There are over 4.5 million of officially registered internally displaced people (IDPs) in Ukraine (State Enterprise 'Information and Computing Center of the Ministry of Social Policy of Ukraine', 2025), while, according to UNHCR, 5.6 million Ukrainians fled abroad (UNHCR, 2025). In addition, approximately 19 500 children from Ukraine were deported to Russia (Bring Kids Back UA, n.d.).

The risk of a low return rate among Ukrainian refugees is a widespread concern among both experts and the general public in Ukraine: "I'm sure that there is a big number of people who will not come back to Ukraine even after the war is over" (UA06, 2025). Currently, some surveys demonstrate that 43 % of Ukrainian refugees are going to return to Ukraine (Mykhailyshyna, Samoiliuk, Tomilina, Myronenko, & Levchenko, 2025). In this context, some experts even identified the refugee/temporary protection policies of certain EU states towards Ukrainians as a threat since "many Ukrainians would not want to return, and some Member States will have 'pro-stay' policies" (Focus group with experts). These states consider Ukrainian refugees as valuable human resources that can provide economic benefits to host countries: for instance, "Germany would see it as an opportunity and would try to have as many people staying as possible, especially because they invested quite much into integrating them" (Focus group with experts). Thus, Ukraine risks losing people who become rooted in other countries, economically stable and unwilling to return.

As women and children are disproportionately represented among Ukrainian refugees/people under temporary protection, there is a threat of youth outflow and ageing of the population in Ukraine (Mykhailyshyna, Samoiliuk, Tomilina, Myronenko, & Levchenko, 2025). Even more so, as the birth rates had already been low before the start of the full-scale war. One expert suggested that such a dynamic represents considerable risk to Ukraine as there might not be enough people to be engaged in a productive economy and generate revenues compared to 2020-2021 (UA06, 2025).

The availability of financial resources and budget revenues is also under threat, particularly as they are essential for continued resistance against Russian aggression and for sustaining the economy and societal functioning. Thus, respondents identified the suspension of macroeconomic aid from Western partners as one of the most critical threats which could lead to a financial crisis within few months. On the one hand, many experts agreed that Ukrainian financial institutions have thus far implemented effective wartime economic policy: "The Ministry of Economics, the Ministry of Finance, the National Bank…successfully mobilised for us external economic and financial assistance enough to live, in principle, normal life during the war" (UA04, 2025). On the other hand, as the bulk of Ukraine's own revenues go to the military and defence, Ukraine is currently dependent on macroeconomic support from international partners (UA06, 2025). According to the official reports as well as experts' analysis, around 50 % of the Ukrainian budget in 2024 has been covered by international support (Samoiliuk, 2025). In this context and given that the fieldwork was conducted amidst discussions regarding the U.S.–Ukraine mineral deal, some respondents identified the Trump administration's policy of pressuring Ukraine with an unfavourable resource deal as a threat in itself: "the most social and economic threat is now the United States, with Trump and his constant attempts to push Ukraine, which is not [economically] beneficial for us" (Focus group general).

An absence of a definite victory or a ceasefire with sufficient security guarantees, according to all our respondents, represents not just a security/military, but also a socio-economic threat. For example, it would encumber external and internal investment: one expert noted that "[not] enough grounds for people and investors to expect that [such] cessation to be persistent" (UA04, 2025); while another expert added that "grey zone[98] when…it cannot have reconstruction because of the looming threat from Russia" (UA07, 2025); and thus investors will refrain from committing funds to Ukraine's reconstruction: "[as] their investment is not protected" (Focus group with experts).

Another significant challenge, as one expert noted, is the lack of a strategic vision for how Ukraine plans to attract postwar investment: "We also need to have a clear strategy on how we talk with the investors and how we attract investors" (Focus group with experts). Regarding the origin of foreign investments, experts also pointed to potential risks posed by the political influence that external investors could exert via their capital. For example, if Ukraine indiscriminately accepts investment during postwar reconstruction, countries like China could exploit their cheap credit strategies with potentially harmful consequences: "It's important for Ukraine not to become addicted to Chinese money flow in terms of reconstruction, because that is then a powerful instrument of impact on the country" (Focus group with experts). Some experts said that another threat to the investment climate is coming from the Ukraine's current system of legal protection for property rights as it might negatively affect the process of attracting investment—both during and after the war: it "makes Ukraine too risky and unattractive for internal and external investors" (UA04, 2025).

Geography will also become a factor in reconstruction, potentially causing regional imbalances. Regions closer to the Russian border, in the absence of solid security guarantees, will receive fewer resources: "Highest risks will be preserved there, accordingly, there will be less investment" (UA04, 2025). This is particularly problematic because, as the expert noted, many residents of the temporarily occupied territories relocated to these frontline regions, close to their homes. Thus, there is a risk that reconstruction in these areas will be inadequate: "It can lead to an imbalance when the investment in those regions that are closer to Russia will be less, and there will be a lot of people left there" (UA04, 2025).

On the other hand, there is also a positive side to it: these areas are industrial centres that allow internally displaced persons to find employment. This, in turn, supports the continued operation of the defence industry, even under wartime conditions. It reinforces both social and military resilience: "In fact, people moved to those absolutely not the safest places in the country, but where there is a lot of physical capital: Kharkiv, Dnipro, Zaporizhzhia, the Dnipropetrovsk region, Kryvyi Rih – those areas where there are a lot of factories and equipment…where it is relatively easier to develop defence production" (UA04, 2025).

Another threat stemming from geography is a post-war Ukraine losing its role as a transit country and becoming, as one of the experts put it, a "deaf corner of Europe" (UA06,2025). As they put it, "we can lose our transit status because there will be no more transit through us. Ukraine will retain a transit through the Black Sea, but here we have natural competitors: Bulgaria, Romania. And if we look at the map of Ukraine,

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[98] A territory close to the frontline which is not under permanent control of any armed forces or government.

then we have Belarus and Russia there, and most likely we will not have any economic relations there" (UA06, 2025).

On a similar note, in the Black Sea region, there could be a threat of Russia's deliberate manipulation of international maritime law—a strategy experts refer to as lawfare (i.e., warfare through law). Russia might use this tactic to de facto transform parts of the Black Sea into zones of prolonged isolation closed off from regular commercial and civilian activity. For instance, it could declare vast maritime areas "danger zones" for extended periods, abusing notification mechanisms designed for short-term military exercises to effectively create a naval blockade without officially declaring one: "Not allowing … commercial ships to go from Odesa to Bosphorus… This is what happened before 2022. And I'm afraid that Russia will use it again" (UA01, 2025). Still, this threat is assessed as low considering that over 2023-2025 Russia has not been able to prevent "a grain corridor" from functioning.

Some experts voiced concerns over the process of European integration and whether Ukraine will find its own place within the EU's common market (UA08, 2025); or over the type of economy a post-war Ukraine might have and the proportion of high-tech/high-processed goods in it (UA03, 2025). Another expert raised an issue of EU agriculture producers, particularly considering the scale and competitiveness of Ukraine's agro-industrial sector which could easily outpace European producers, drastically cutting their profits. As he put it, it could become a barrier to Ukraine's EU accession: "If we become part of the European Union, they will receive such a powerful agricultural sector, to which they will have to pay much more than they pay now… We will withdraw almost 80 % of all subsidies for agricultural producers" (UA06, 2025). Yet another expert remarked that in the accession process, Ukrainian businesses will also face the challenge of adapting to the EU's economic regulatory framework—some of which could reduce their profitability (UA04, 2025).

Discussing the socio-economic threats coming from external actors, experts also mentioned the possibility of the re-emergence of the threat that existed before the full-scale invasion: the renewed competition with Russia in certain sectors of global trade—particularly agriculture and defence exports, including drones, missiles, and electronic warfare (Focus group with experts). Also, the majority of our respondents and experts mentioned threats coming from China aiding Russia to circumvent sanctions and maintain trade mechanisms: "This is such a multifaceted work of China with Russia, all Russian companies work through China" (Focus group with experts). For example, China has supplied Russian companies with shipping containers and taken over all Russian cargo transportation to Far Eastern ports (Focus group general). Regarding global trade and security, experts also mentioned that China may indirectly fuel global instability by escalating tensions in the South Pacific and broader Asia (Focus group with experts).

9.3.2. Resilience to socio-economic threats and opportunities

Although respondents did not discuss socio-economic resilience a lot, catching their ideas from other questions, we still conclude that resilience in the socio-economic sphere is based on several pillars: institutions responsible for the fiscal and economic policy, sufficiency of key necessary resources, and the private sector's agility and social responsibility.

Experts acknowledged the proper measures taken by the governmental institutions in the fiscal and economic sectors both before and after the full-scale aggression (UA04, 2025). For instance, financial sector

reform, which has been in place since 2014, introduced structural changes that made the sector more stable and resilient to shocks (Ministry of Finance of Ukraine; National Bank of Ukraine; National Securities and Stock Market Commission; Deposit Guarantee Fund, 2021). In February 2022, the National Bank, the Ministry of Finance and other relevant institutions took steps to save the stability of the system (National Bank of Ukraine, 2022). All these contributed not only to the resilience of the financial sector but also of the population and businesses since their assets were secured and access to them was guaranteed, thus, the trust in the financial institutions was maintained.

Occupation of significant agrarian regions of Kherson and Zaporizhzhia at the beginning of the full-scale invasion, Russia's blockade of key seaports in the Black Sea (Goncharenko, 2023), seizure of the Zaporizhzhia Nuclear Power Plant (Reuters, 2022), and regular attacks on the energy infrastructure (UN Human Rights Monitoring Mission in Ukraine, 2024)–all aimed also at cutting Ukraine off both its internal and its external supply chains–failed to reach their objective of socioeconomic destabilisation of Ukraine. One of the reasons is that Ukraine has a sufficient amount of its own key resources: from food to electricity production facilities. Also important is the ability to maintain and protect maritime trade routes through Black Sea ports, which is vital for Ukraine's exports (agricultural goods, steel, iron ore).

One more crucial element of resilience is of a grassroots nature. Both large enterprises and SMEs showed their social responsibility in responding to the full-scale war. They have been donating to the army and supporting their employees drafted into the army. At the same time, they happened to be flexible enough to work without a stable centralised electricity supply or to relocate their production from the frontline regions if necessary and, more importantly, to be able to quickly restore their activities after the Russian attacks. Businesses' grassroots resilience significantly contributes to the country's economic capacities and citizens' well-being.

It should also be noted that although European integration was mentioned as a threat by some experts, it is widely considered an opportunity for the Ukrainian economy and societal development and rebuilding. Respondents mentioned the current opportunities and potential for cooperation with the EU, EU MSs (Particularly, Poland, Germany, France, Sweden) in the miltech industry, recovery and rebuilding of ruined infrastructure and cities of Ukraine, in other different sectors of Ukraine's economy.

9.4. Political threats, opportunities and resilience

9.4.1. Political threats

In discussing political threats and risks, almost all experts mentioned growing international and geopolitical turbulence and Russia's aggressive soft-power influence and hybrid campaigns. The rise and danger of populism were also often remarked upon.

Experts noted that currently the level of centralisation of power in Ukraine has risen, which is to be expected both from the practical and from the legal/constitutional perspectives during wartime and under martial law. Ultimately, such monopolisation of certain policy sectors was perceived as a potential threat—primarily due to the resulting inefficiency in resource management. As one expert highlighted "Ukrainian authorities missed far too many opportunities to invest the support into better management of resources and [into] a

more proactive position in Europe and in the Euro-Atlantic world" (UA05, 2025). Another respondent emphasised a broader trend within the current government: its reluctance to view institutions as a foundation during wartime. As noted, "our government does not believe in the institutions now. They believe more in personalities" (Focus group with experts). Some experts also said that there is a lack of competencies among Ukrainian politicians and officials—something that might lead to inefficient management, especially under wartime conditions. Respondents also remarked that populist political figures, corruption scandals, and general media hype regarding political issues contribute to the public's growing distrust of the political leadership (Focus group general).

Some respondents commented on the positive sides of centralisation of power under wartime conditions — emphasising the need for faster decision making instead of lengthy political debates. Still, a more prevalent viewpoint stressed the need for pluralistic engagement of various stakeholders in political discourse and decision-making during wartime when strategic vision as well as the development and implementation of long-term policies becomes critically important. Thus, the respondents highlighted that the lack of dialogue influenced the quality of the decisions. Such dialogue should also include civil society organisations, experts, other stakeholders, and political opposition (Focus group with experts). Also, this is necessary to ensure that as many actors as possible are involved in communication efforts and in strengthening horizontal ties with European partners and the United States.

Many respondents also expressed concerns regarding Ukraine's governmental strategic communications, both external and internal, and information policy: "Information policy, which does not exist, it does not work, it is absent internally and so it affects the international level, our relations" (Focus group general). Some experts also noted that the government's tendency to avoid difficult issues and unpopular decisions — combined with the lack of debates and "no critical discussion of what is happening in the country"—may lead to growing public distrust (Hrushetskyi, 2025). This may pose a serious threat as, in search of alternative information and opinions, people might become targets of mis/disinformation attacks and the enemy's propaganda or PSYOP and might further spread such content ultimately demoralising the Ukrainian public.

At the same time, the information environment shaped by independent actors—media outlets, bloggers, and other Ukrainian information platforms—often lacks the capacity to withstand the pressure of Russian mis/disinformation operations. According to respondents, this is due to the asymmetry between Ukrainian and Russian resources in countering Russian propaganda and disinformation campaigns: "At the beginning of full-scale aggression, it was possible to see how much the Ukrainian information machine worked, but now… [it is] backsliding. … To one Ukrainian piece of news, aimed at undermining some [Russian], Russia will upload [another] 10, maybe even 20" (Focus group general). Several experts also said that Ukraine must develop, control, and disseminate its own narratives about the Russian war against Ukraine and its global implications: "This is a big problem for us to create a coherent narrative of our relations with Russia, of the war, and be able to fit this narrative into different contexts" (Focus group with experts). In relation to this, one of the experts noted that there is a shortage of people with expertise in non-Euro-Atlantic/non-Western regions and languages, which is also a challenge for Ukraine's political and cultural diplomacy (Focus group with experts).

Several experts suggested that growing global turbulence and instability, together with erosion of international law and order, might also become a threat to Ukraine. Some also said that Russia actively supports and breeds such global turbulence, both in the so-called Global South and within the EU, for example by supporting populists, extremists, etc. (Focus group with experts). Another major threat stems from the global rise of populist politicians who employ various tools to gain power (UA09, 2025). The very foundations of democratic systems are under attack: "Democracy is under attack… because of populism, and because of the media…. we have right now a crisis of trust in classic media [and] a lot of social media influencing" (UA03, 2025).

There is a widespread view among our respondents that the EU itself might also generate political risks for Ukraine—particularly due to the uncertainty of the accession process and Ukraine's future membership as well as bilateral tensions with some Member States (e.g. Hungary, Slovakia etc.). As one expert noted, "the EU doesn't have benchmarks. And the evaluations of our reforms are very contextual. They also depend a lot on evaluations and perspectives from individual Member States" (Focus group with experts). Post-war, if the accession will be delayed and such obstacles on the way to EU membership will persist, it might lead to public resentment in Ukraine, dissatisfaction with the EU, and even to the potential rise of populists and/or radical political forces: "Especially after the war… after you have fought so much for this" (Focus group with experts).

Our respondents consider it a threat to democracy in Ukraine to insist on any elections while the war is still going on. As one citizen noted, "the desire to hold elections now is a threat that leads to the escalation of the political situation and instability in the country" (Focus group general). Focus group participants remarked that the Ukrainian Constitution prohibited holding elections under martial law and that the pressure placed on Ukraine by some international partners, particularly US and Russia, to do so was an intrusion into Ukrainian sovereignty: "The threat to the democracy of Ukraine also comes from the side of our international partners who demand elections in Ukraine. We should not be guided by anyone to impose elections in Ukraine" (Focus group general). Furthermore, Russia actively exploits this issue in its PSYOPs, constantly undermining and questioning the legitimacy of Ukraine's President and other authorities.

Experts paid significant attention to the issue of the post-war election and electoral process in Ukraine. Some consider that Russia (if able) will seek to influence them through various means. For example, through the revival of pro-Russian political forces to political life in the form of a "pro-peace" or a "pro-reconciliation" party. As one expert made clear, "… [They] will not be openly saying that "we're for friendship with Russia"… but in the post-war society, so wounded [and thus] ready to do anything not to repeat this experience… And Russians will definitely use it in order to infiltrate our politics with their proxies" (Focus group with experts). Some other experts talked about the risk of political polarisation within Ukrainian society that might hinder Ukraine's capacity to consolidate and prepare for any future threats from Russia. On this note, some experts noted that social tensions may arise between different parts and groups of Ukrainians. For example, between those who remained in Ukraine during the war and those who fled abroad or on the issues of those men who'd been in the active army service and those who avoided it. One expert said that such issues could even spark debates over voting rights: "If a person left Ukraine like…3 years ago, and if he doesn't plan to return to Ukraine, then there will be a debate whether these people have a right to vote. If you do not plan to come, if you do not pay taxes, if you do not participate in any way in defence of the country, either as a soldier or the one who is paying taxes… then there will be a huge debate, very painful one" (UA03, 2025).

Another expert expressed concern over the level of competence that future popular political candidates might have. Remarking on recent trends, they noted that "there is a very strong demand among Ukrainians for war veterans [and] volunteers to become future leaders of the country. It's a good thing, but it's also a challenge. With all due respect to our soldiers… many of them do not have political experience, do not have enough knowledge about governance" (UA02, 2025).

Some experts also emphasised that it is crucial for a post-war political and democratic development of Ukraine to have a just resolution to the war or a just peace agreement, as otherwise, it might radicalise Ukrainian society and pave the way to populism. Particularly, if an unjust ceasefire would be the result of Ukraine's partners' pressure.

Talking about the post-war situation, one of the experts admitted that one of the key challenges will be for Ukraine to keep developing and pay necessary attention to security issues (UA03, 2025). Another expert also noted that the challenge may lie in the demobilisation and the end of martial law in itself, particularly if there is only a ceasefire and no noticeable transformations in Russia and its rhetoric and behaviour. Such processes might, by themselves, weaken Ukraine's defence capabilities and thus should be conducted carefully. In particular, demobilisation shouldn't weaken the capacities of Ukraine's Armed Forces (UA01, 2025).

9.4.2. Resilience to political and cultural threats and Opportunities

Overall, our respondents were very confident about Ukraine being and remaining a democracy both now and post-war. As some put it: "We [Ukrainians] are doomed to democracy" (Focus group general). Another expert added, "I don't think that, from the "technical" democracy perspective, as most people in Ukraine understand it, which includes free elections, freedom of speech etc., we have significant threats here. We have gone through three years of full-scale invasion: if the incumbent authorities wanted to establish a wartime dictatorship here, they would have done so. And I think it's not a matter of capacity, but rather a lack of desire to do so. So, after the war, we should not expect either tightening the screws or arresting anyone" (UA04, 2025).

Our respondents emphasised Ukraine's political resilience—its ability as a state, society, and institutional framework to adapt, function, and maintain a democratic trajectory under extremely difficult conditions. The majority agreed that since the beginning of the full-scale invasion, Ukraine has demonstrated an unprecedented capacity to transition swiftly into crisis management mode, even though many decisions have been reactive and situational.

It is worth noting that despite the constraints of martial law, the media landscape has not been monopolised, nor has freedom of speech been suspended. Moreover, citizens have retained their rights to rally and protest. As one expert noted, "under this [martial] law, it's literally written that the government can just close all media — just close them. And actually, I think we still have a pretty good level of freedoms here. Even rallies like 'Free Azov'" (UA01, 2025).

Experts said that civil society has acted as one of the key pillars of resilience—frequently compensating for ineffective government decisions or watchdogging authorities. The society's ability to foster and maintain strong horizontal networks was also highlighted: "Ukrainian society is one of a European type that is oriented on initiative, on helping each other, on creating personal networks" (UA05, 2025). This resilience and the

society's capacity for "self-healing," as one expert described it, had been attributed to Ukraine's long-standing struggle for democratic values: "In Ukraine, there is this feeling, the history of revolutions in Ukraine and the resilience, democratic resilience of Ukraine during the 11 years of war with Russia. I think they proved and showed quite openly that Ukraine is a democratic state" (UA07, 2025).

9.5. Policy areas

In all our interviews and focus group discussions we asked respondents to identify policy areas in which the EU could help Ukraine strengthen its resilience and capacities. They were also welcomed to share their ideas and propositions on how it could be achieved.

Thus, there were eight key policy areas identified by respondents:

1. **Military assistance to Ukraine and support in maintaining its sovereignty and fighting Russian aggression**

All our respondents emphasised the importance of the EU's military support to Ukraine and the EU-Ukraine alliance in fighting Russia's aggression in different spheres (including economic, diplomatic, and legal). Respondents emphasised that the defence of Ukraine's 1991 borders is a red line upon which the internal legitimacy of the Ukrainian state depends. Thus, any legitimisation of territorial loss, even temporary, was identified as a potential trigger for internal destabilisation, with one interviewee warning that conceding territory would "open a Pandora's box" and potentially lead to civil unrest. While interviewees acknowledged that sending the EU troops to Ukraine is politically unrealistic for now, several experts emphasised the symbolic value of joint defence cooperation – cooperation that is relevant both during the war and in the post-war period. "What the European Union can do for that is … continuous support to Ukraine, … and to arm Ukraine up to the teeth, and when possible, to deploy troops with boots on the ground in Ukraine. That will help the Ukrainian government, that will help the Ukrainian society, and that will help the Ukrainians trust in their European partners" (UA07, 2025). One of the experts also put forward the idea of the EU helping Ukraine to establish private military companies (PMCs) as a tool to attract foreigners to join the war against Russia (UA08, 2025).

2. **Strategic political integration into the EU and NATO. Mutual benefits and Ukraine's EU accession.**

All our respondents agreed on the importance of Ukraine developing closer strategic cooperation and integrating into the EU and NATO. As experts have emphasised, the security of both the EU and Ukraine is interdependent: "if Ukraine is successful, Europe is successful, if Ukraine is a loser, unfortunately, Europe is the one which would feel the most negative consequences" (UA03, 2025).

The majority of experts stressed that the EU must stop viewing Ukraine only as a recipient of charitable aid or a security consumer and instead begin recognising it as a strategic partner and a net contributor to the common security and defence of the EU, its Eastern flank. That is particularly so as Ukraine, its armed and defence forces and Ukrainian society had gained a unique experience in fighting full-scale war that combined modern warfare, technical innovations, and conventional land operations. As one of the experts put it: "Ukraine strengthens the EU, Ukraine can contribute a lot to the EU as a market, as a producer, as a contributor to the EU's defence, rather than being a troublemaker that would bring the Russian threat closer.

… Russia is already in the EU, through sabotage and subversion; therefore, Ukrainian membership does not bring the threat closer, but rather pushes it back" (UA07, 2025).

3. **Military-industrial cooperation and co-production with the EU and EU MSs**

Closely linked was the call to integrate Ukraine's defence industry into the EU's military-industrial ecosystem. Respondents pointed to an imbalance between urgent weapons deliveries and the lack of long-term strategic cooperation. One expert proposed a legal framework to establish Ukrainian defense production facilities in secure NATO and EU countries, such as Poland: "I believe that the European Union's economy could be more actively involved in the military-industrial complex of Ukraine, creating joint enterprises, and the location of our enterprises in the protected territories of the European Union" (UA06, 2025). Joint ventures, co-production agreements, and harmonised standards were highlighted as win-win mechanisms for both Ukrainian and European security.

4. **Judicial independence and anti-corruption reforms**

The majority of our respondents insisted that the EU support of judicial reform is critical both currently and in post-war Ukraine. It is important that such reform should facilitate the independence of the judiciary, particularly from political and corporate pressure. For example, some experts mentioned that it is necessary for the EU to continue to provide technical assistance for merit-based appointment systems, especially within anti-corruption institutions like the National Anti-Corruption Bureau of Ukraine and the High Anti-Corruption Court.

5. **Economic recovery and investments**

Economic recovery was the second most frequently cited policy area. Respondents emphasised that economic survival goes hand in hand with democratic consolidation. The EU's role here was framed as twofold: enabling structural economic transformation and ensuring that reconstruction efforts are transparent. This includes the call for the EU to facilitate the seizure and repurposing of frozen Russian assets as a critical financial cornerstone of Ukraine's post-war recovery: "That is how you pay for the recovery of Ukraine, that's how you help create employment for the Ukrainian, that's how you help bring back the Ukrainians who are now living abroad" (UA07, 2025).

6. **Social cohesion and reintegration, civic resilience, and human capital development**

Another important policy area for the EU support and involvement was reintegration, inclusivity, and facilitation of social cohesion. Some experts noted the importance of supporting the programmes for reintegration of veterans into civilian life—and, most importantly, the assistance in development and provision of rehabilitation programmes for wounded service members. "For Europe to secure a smooth transition from wartime Ukraine to peacetime Ukraine, Europe has to be there as Ukraine's partner in rehabilitation programmes, in inclusiveness programmes, in recovery programmes, but also economically as investments" (UA07, 2025). Some respondents also suggested that the European Union and EU MSs could partially or completely replace USAID in supporting civil society, public sector, and governmental programming (Focus group general).

Respondents also called for continuous and closer EU engagement with Ukraine's civic infrastructure, particularly regarding youth. Some respondents noted that while the economic situation in Ukraine most probably will remain challenging for the years to come, the Ukrainian society, political and social conditions might present a lot of opportunities thus attracting youth to stay in and/or return to Ukraine, to have their families here etc (Focus group general). Thus, respondents called for the EU to support programmes in Ukraine that are aimed at development of human capital and civic and public engagement, including vocational education programmes, civic innovation initiatives, regional and local public and civic initiatives, and trauma-informed policies, especially for war-affected youth and veterans.

7. War crimes documentation and international legal proceedings

Other urgent policy areas frequently mentioned by respondents are the documentation of war crimes, the need for an international tribunal for the war crimes perpetrators under IHL, and the demand for justice and truth on the national level (IHR and transitional justice). Experts observed that Ukraine is currently underperforming in international litigation due to bureaucratic delays and insufficient legal capacity. The EU can support Ukrainians efforts in this domain through provision of forensic equipment, legal expertise, and support for the documentation of crimes such as deportation of children and environmental war crimes (ecocide): "We probably need to collect information very carefully today about all the damage and crimes of the Russian Federation that were committed during the war. We need to make it more effective and get rid of these processes of mutual bureaucratisation" (UA06). Also, the EU's support and actions are vital in establishing the international tribunal and its functioning. Respondents emphasised that the restoration of justice and rights is crucial both in the context of upholding international law and order and in the context of post-war social cohesion and legitimacy within Ukraine.

8. Overcoming EU's bureaucratic inertia and enhancing agility

Finally, respondents pointed out the bureaucratic inertia within the EU as a structural obstacle. For example, while Europe's financial commitments were readily acknowledged, experts expressed frustration with programmes and frameworks that are taking time to be passed and, as such, might become outdated and fail to respond to Ukraine's current needs (Focus group general). Several experts proposed greater budgetary flexibility, agile programming, and clearer communication on disbursement timelines. Otherwise, as experts warned, in the event of a possible halt in U.S. assistance, the EU will not be able to mobilise sufficient resources on short notice.

9.6. Conclusion

Russia's military aggression against Ukraine defines Ukrainians' perceptions toward external actors. Though Russia and its invasion of Ukraine remain the main source of threats in all spheres, the new developments on the battlefield as well as the involvement of new actors shape the map of threats. At the initial stage of the full-scale war, one could hardly imagine North Korean soldiers partaking in the defensive operation of the Russian Armed Forces on Russian territory. Similarly, the US' transactional policy on support for Ukraine could not be imagined either.

The analysis of qualitative data presented in this report regarding local perceptions of threats and external actors in military and security, socioeconomic, and political domains reflects and illustrates the mapping of Ukrainians' positions and attitudes on relevant issues that has been undertaken in D6.1. Since 2014, and particularly since the outbreak of the full-scale war of Russia against Ukraine in 2022, Ukrainian society has been unanimous in supporting the EU and Euro-Atlantic integration as well as in their attitudes towards some external actors. Thus, indeed Russia is perceived as the main source of threats to Ukraine, particularly in military, security, and political spheres, including its international wide use of mis/disinformation campaigns and soft power. In this context, the countries that assist Russia in its aggression are perceived rather as Russia's aides, satellites and/or proxies and not as threats themselves (most notably, Belarus, North Korea, and Iran). Interestingly, the perception of China is more ambivalent–it is regarded as a pragmatic external actor that has its own interests and acts on them, thus assisting Russia where it sees its opportunities while simultaneously maintaining relations with Ukraine and Ukraine's allies.

The ongoing warfare coloured the perceptions of all threats, instances of resilience and points of opportunities. Our respondents talked about resilience as something that is already taking place and that has already been employed at large scale, particularly in 2022-2023. Similarly, threats are perceived as those that are already here and real, particularly in the military and security domain. The full-scale war with Russia changes the milieu and analysis of threats in socio-economic and political spheres–some threats ceased to exist while other actualised. For example, currently the threats from Russian business or Chinese investments into Ukraine are eliminated and it is debatable whether they will reappear after the end of the active warfare. On the other hand, the threats connected to the EU integration and dependence on the its/allies support, to the displacement of people, to the uncertainty connected to the conditions and terms of potential ceasefire/end of war agreements have been actualised.

Still, overall our respondents as well as Ukranians in general are positive and optimistic about both Ukraine`s future and its democracy. It is also important that this future is seen as ultimately a European future both on the strategic and everydal levels. Thus, experts emphasised the mutual benefits of EU-Ukraine integration and cooperation. They also underlined spheres where the EU could enhance Ukraine's (and thus–common European) security and stability as well as democracy.

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UA02	Civil Society/Think Tank	Online, 18.03.2025
UA03	Civil Society/Think Tank	Online, 17.03.2025

UA04	Civil Society/Think Tank	Online, 12.03.2025
UA05	Member of Parliament	Online, 09.04.2025
UA06	Academic Researcher	Online, 13.03.2025
UA07	Civil Society/Think Tank	Online, 13.03.2025
UA08	Civil Society/Think Tank	Online, 13.03.2025
UA09	Civil Society/Think Tank	Online, 14.03.2025

9.7.2. Focus group discussions

Focus Group Discussions	Group	Place and Date
Focus group with experts	Experts from academia and civil society	Online,
Focus group with citizens	Miscellaneous	Online,

9.7.3. Articles and documents

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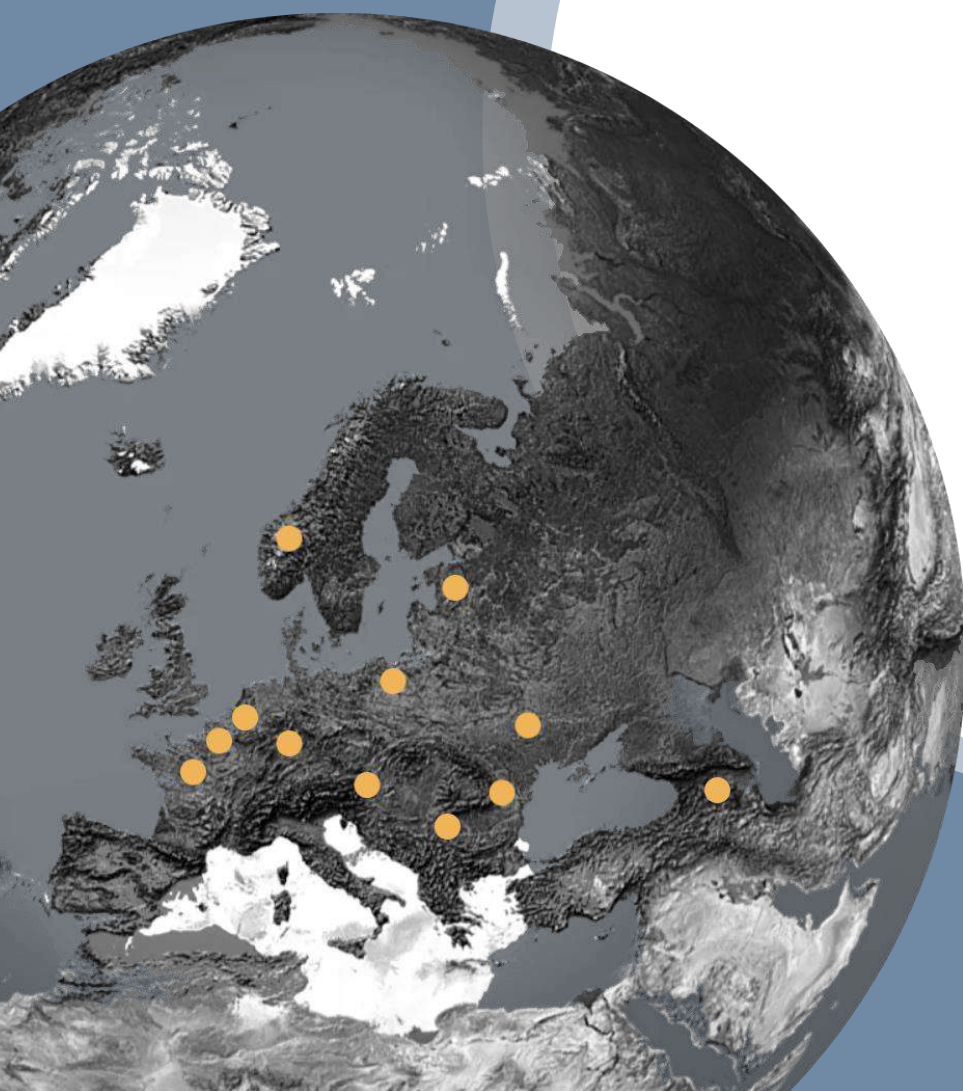
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