



BETWEEN EAST AND WEST

DEMOCRACY, DISINFORMATION, AND GEOPOLITICS IN CENTRAL AND SOUTHEASTERN EUROPE

PUBLIC OPINION RESEARCH IN
Albania • Bosnia-Herzegovina • Kosovo • Montenegro
North Macedonia • Serbia • Slovakia

July 2021

RESEARCH METHODOLOGY

Data collection method National	Telephone and online interviews– CAPI (Computer Assisted Personal Interviewing) and CAWI (Computer Assisted Web Interviewing)
Duration of the questionnaire	20 minutes
Period of fieldwork	March –April 2021
Sample universe	Population of countries 18+, Census data
Sampling frame	Data from the Telephone Directory (Electronic), Population Census and Statistical Estimates of the Population (for telephone survey) and IPSOS on-line panel database (for online survey)
Strata allocation	Proportional to Census data and estimated population dynamics
Sample Size	Albania: 2400 Bosnia and Herzegovina: 2410 Kosovo: 2400 Montenegro: 2428 North Macedonia: 2410 Serbia: 3610 Slovakia: 2400
Margin of error	+/- 2% or under in all polled countries

This research is made possible by the generous support of the United States Government.

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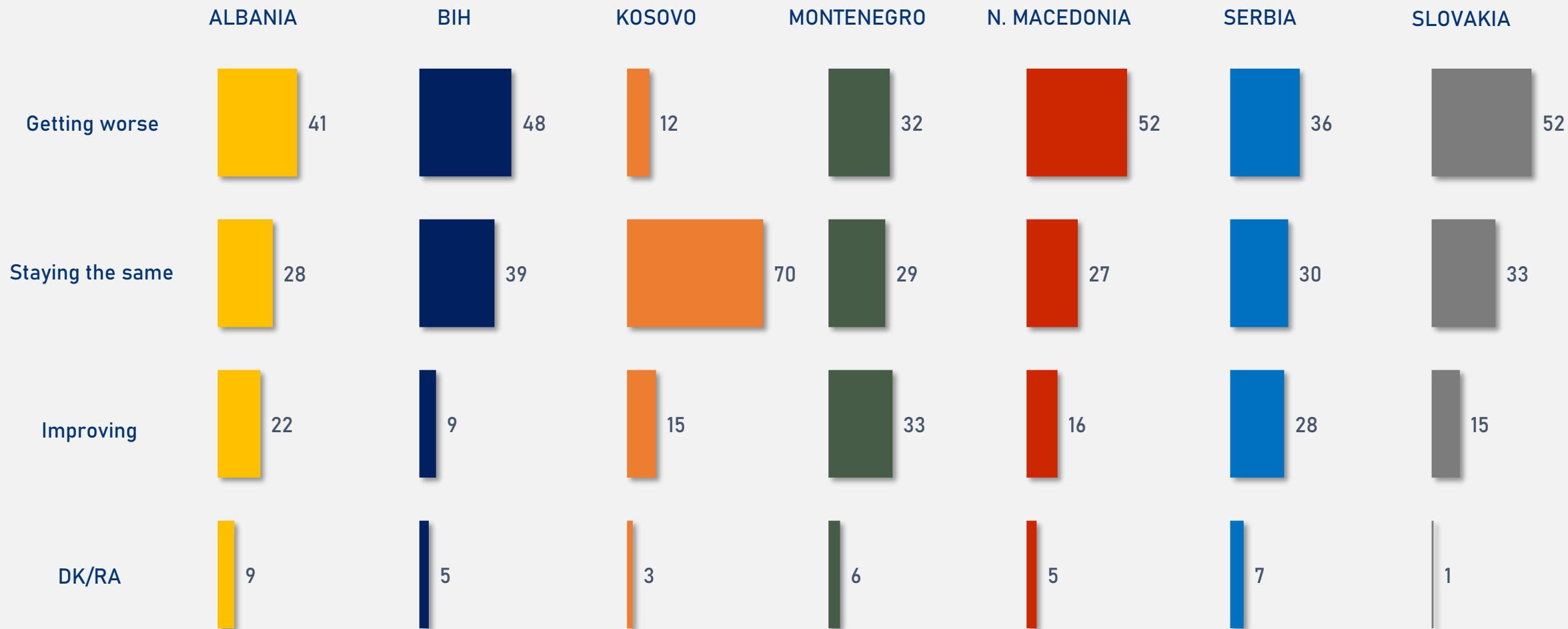
PUBLIC ATTITUDES ON DEMOCRACY

DEMOCRACY TAKEAWAYS

- People assess the state of democracy in their countries as either worsening or staying the same.
- Strong majorities esteem democracy as the preferred system of government, but are skeptical that it can be achieved in reality. At the same time, voter turnout intention in elections is routinely high.
- People associate democracy with the rule of law and equality under the law. They do not see Europe's democratic values of minority rights/inclusion as plausible in their societies.
- People prioritize quality of life over democratic standards. People do not perceive improved quality of life as related to democratic standards and performance—other than in Albania and Kosovo.
- People paradoxically embrace positive views of democratic government and autocratic/"strong leader" government.
- Disinformation and other foreign illiberal influence are having a deleterious impact on public attitudes regarding democratization processes.

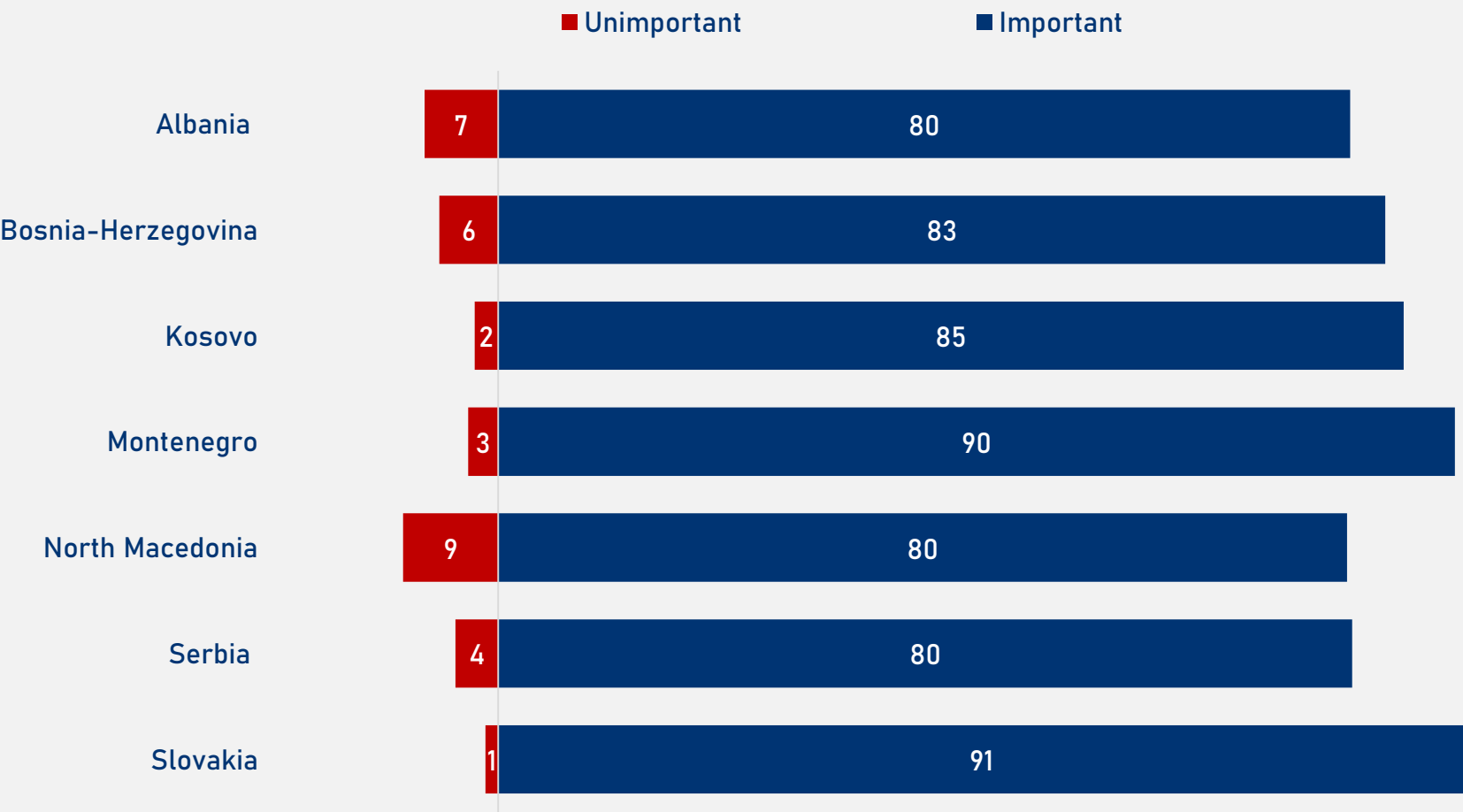
OPINIONS ON STATE OF DEMOCRACY TREND NEGATIVE

Do you think the level of democracy in your country is getting worse, staying the same, or improving?



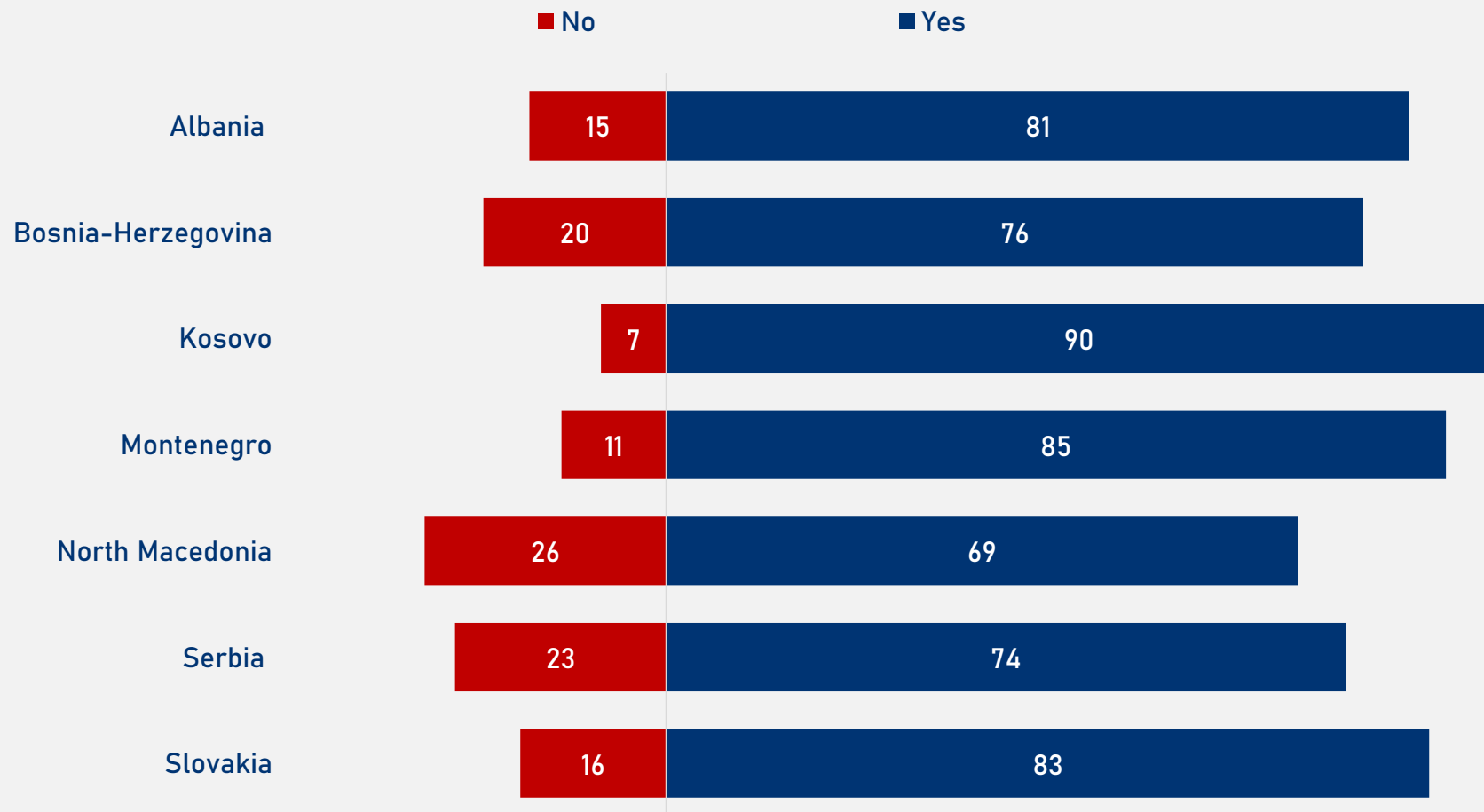
PUBLIC ASPIRATION TO SEE THROUGH DEMOCRATIC TRANSITIONS REMAINS STRONG

How important is it to you that your country becomes a fully functioning democracy?



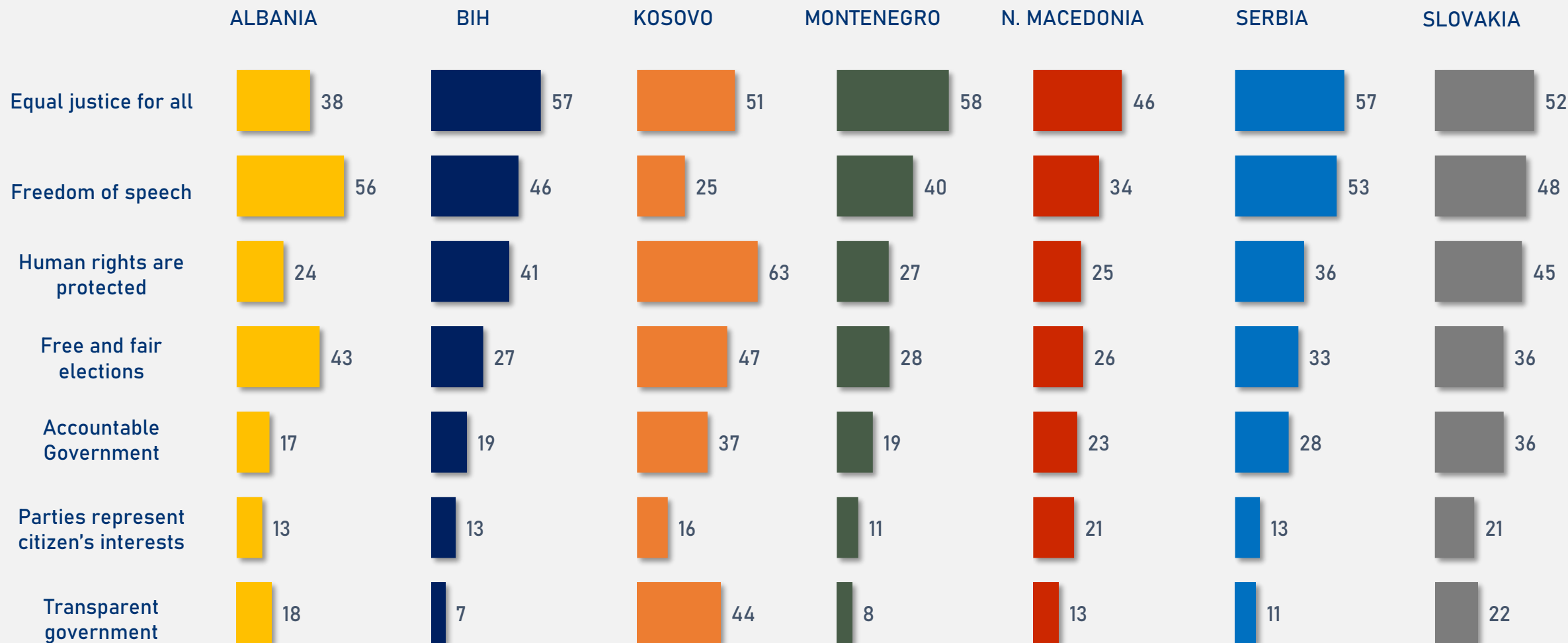
VOTER TURNOUT INTENTIONS ARE HIGH

If the parliamentary elections were held tomorrow, would you vote?



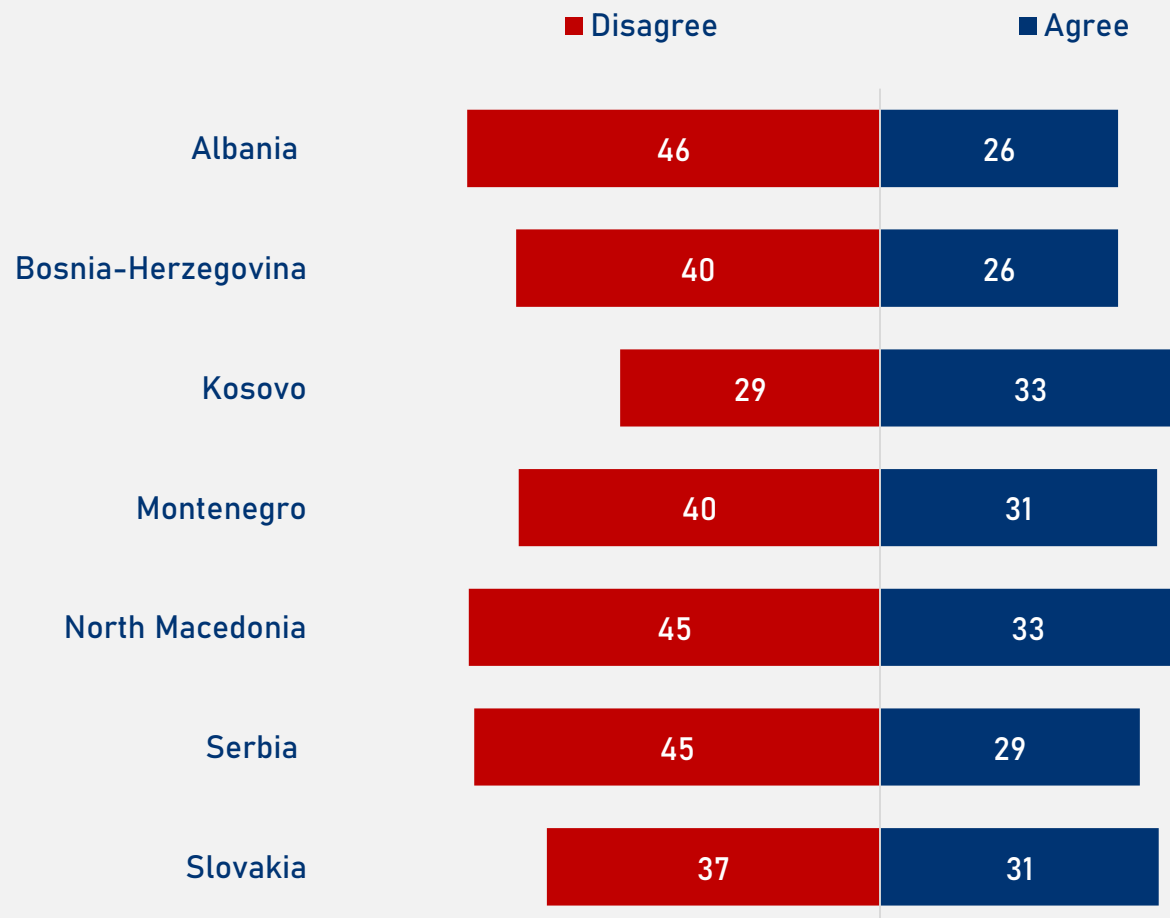
PEOPLE ASSOCIATE DEMOCRACY PRIMARILY WITH THE RULE OF LAW

There are many characteristics of a fully functioning democracy. Which three do you think are most important from the following list?



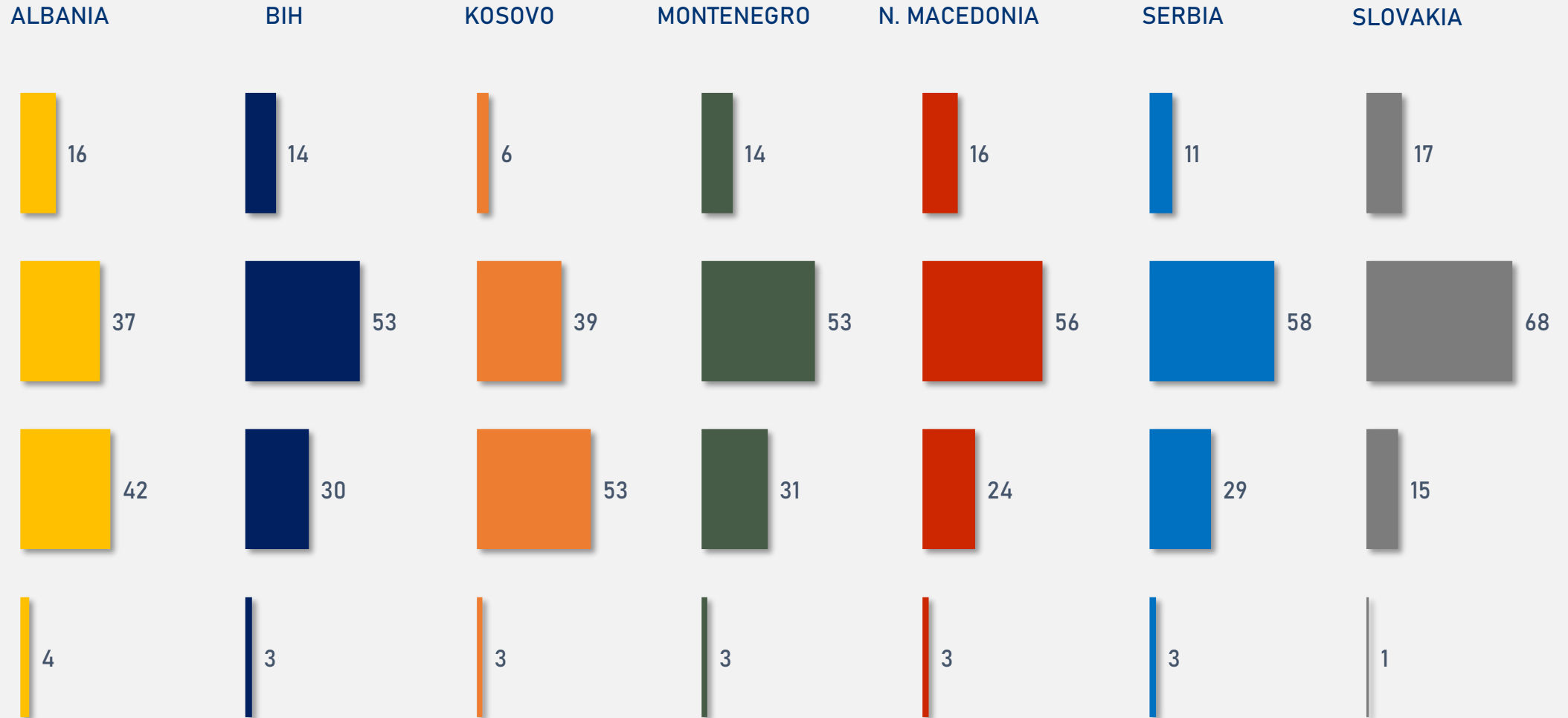
MINORITY INCLUSION IS NOT SEEN AS A PLAUSIBLE DEMOCRATIC STANDARD

To what extent do you agree that Western democracies, which assume acceptance of diversity and inclusion (minority rights, LGBTI rights, migrants' rights and similar), are possible to function in your society?



CITIZENS FAVOR QUALITY OF LIFE OVER DEMOCRACY

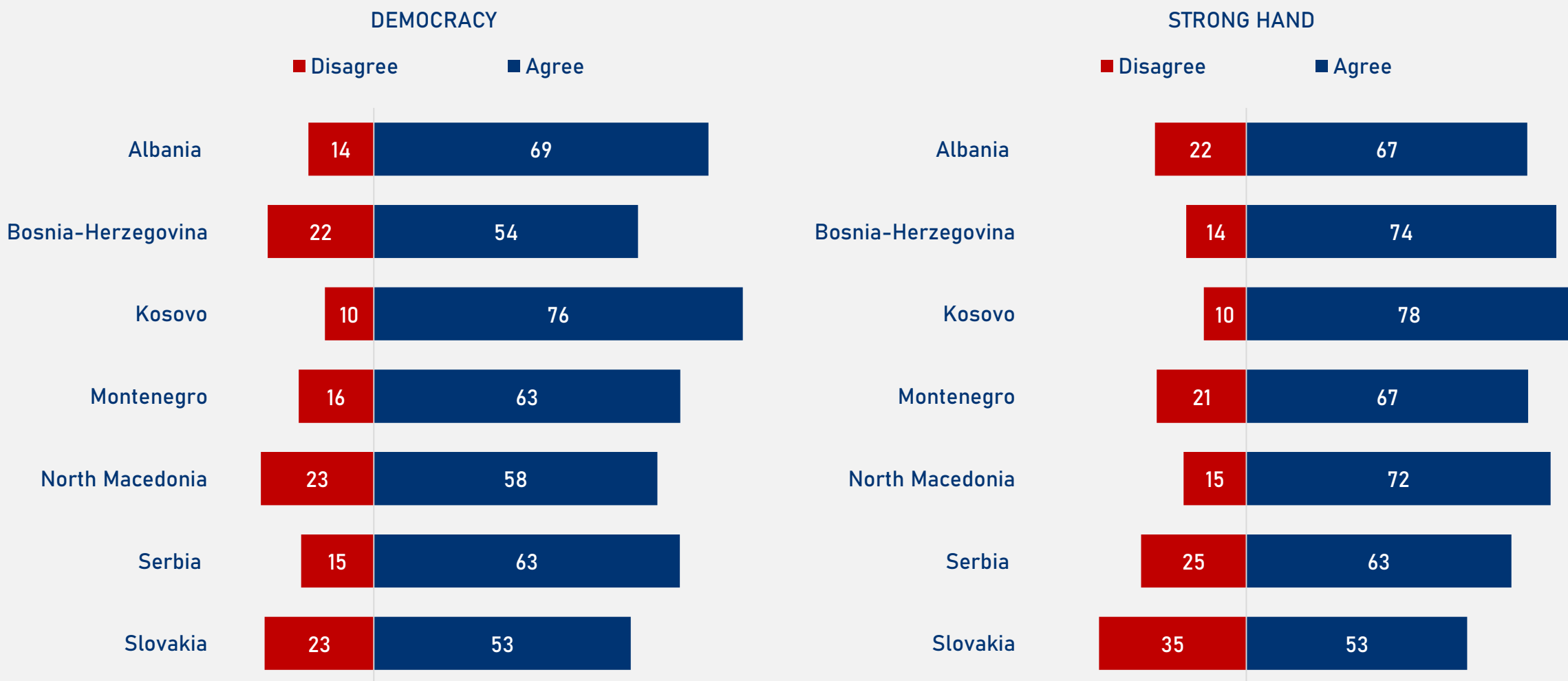
Which statement do you agree with the most?



EQUAL ACCEPTANCE OF DEMOCRACY AND AUTHORITARIAN GOVERNANCE

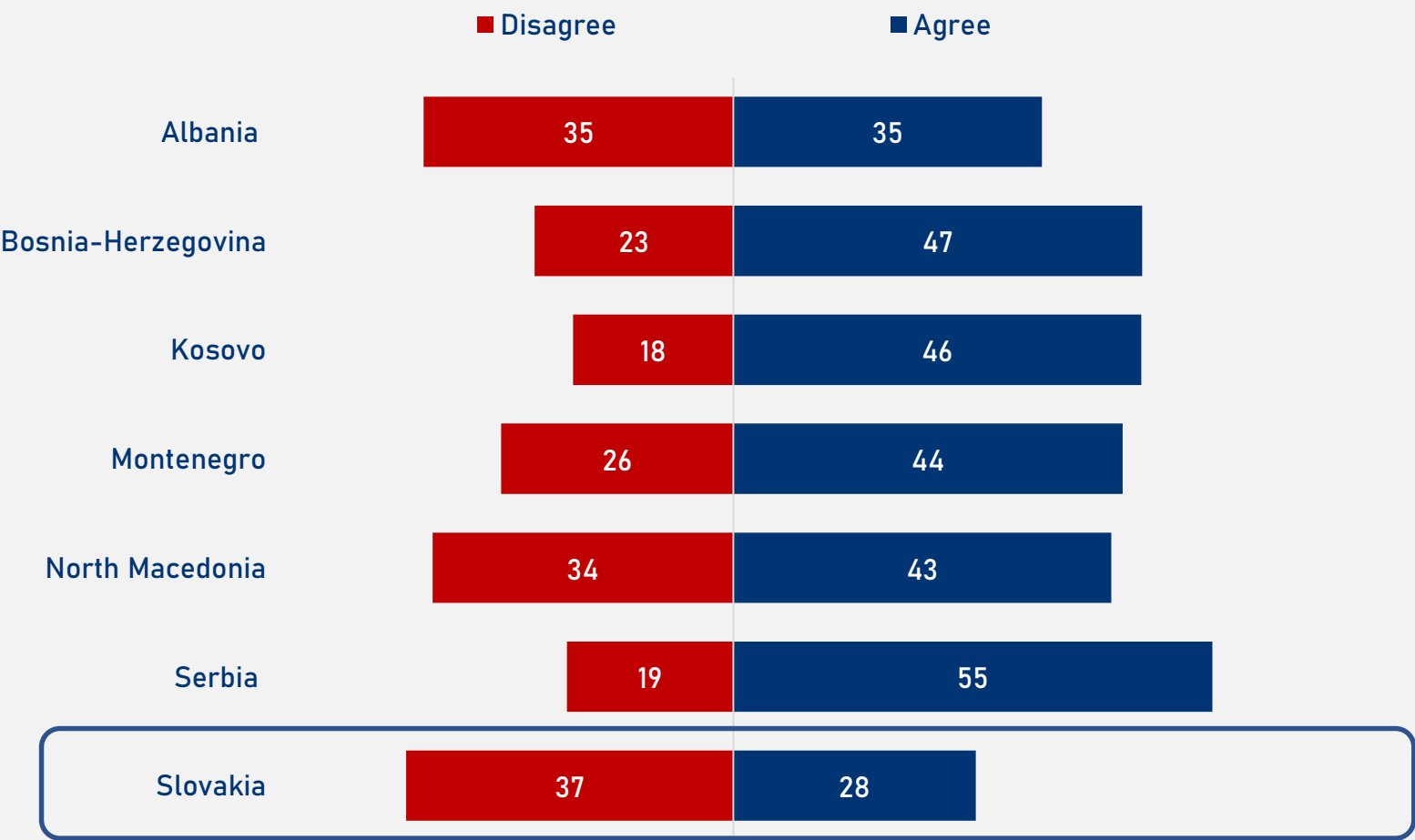
To what extent do you agree with the following statements:

- “Regardless of many challenges, democracy is the most preferred political system for our country”
- “The best option for our country is to have a strong leader followed by everyone, because only a “strong hand” can lead our country in the right direction”



DISINFORMATION ON WESTERN INTENTIONS BEHIND DEMOCRACY HAS IMPACT

To what extent do you believe that democracy is a failed governing system used by the West to impose on countries in transition certain values aimed to masquerade their geopolitical interests?

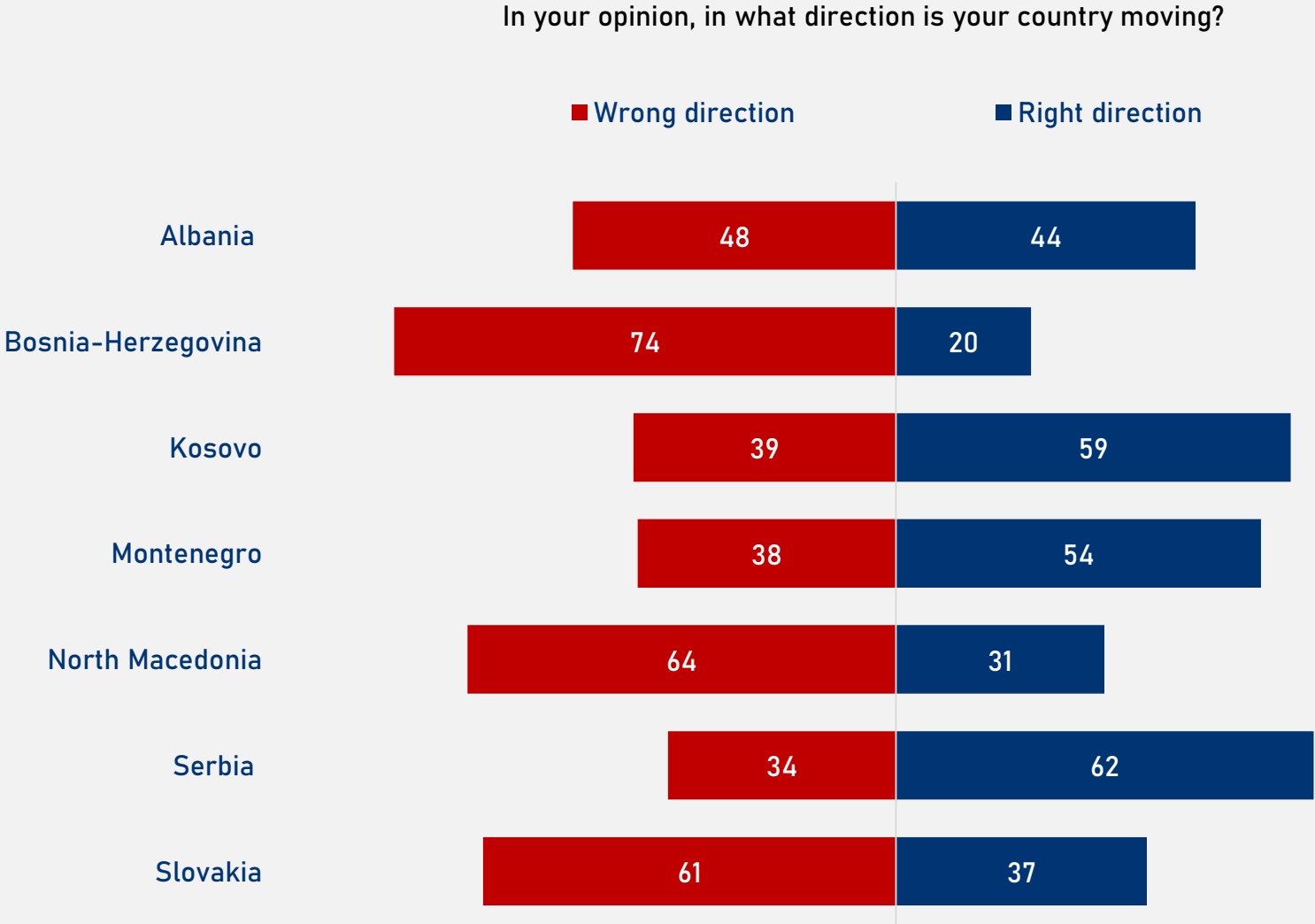


PUBLIC ATTITUDES ON GOVERNANCE

GOVERNANCE TAKEAWAYS

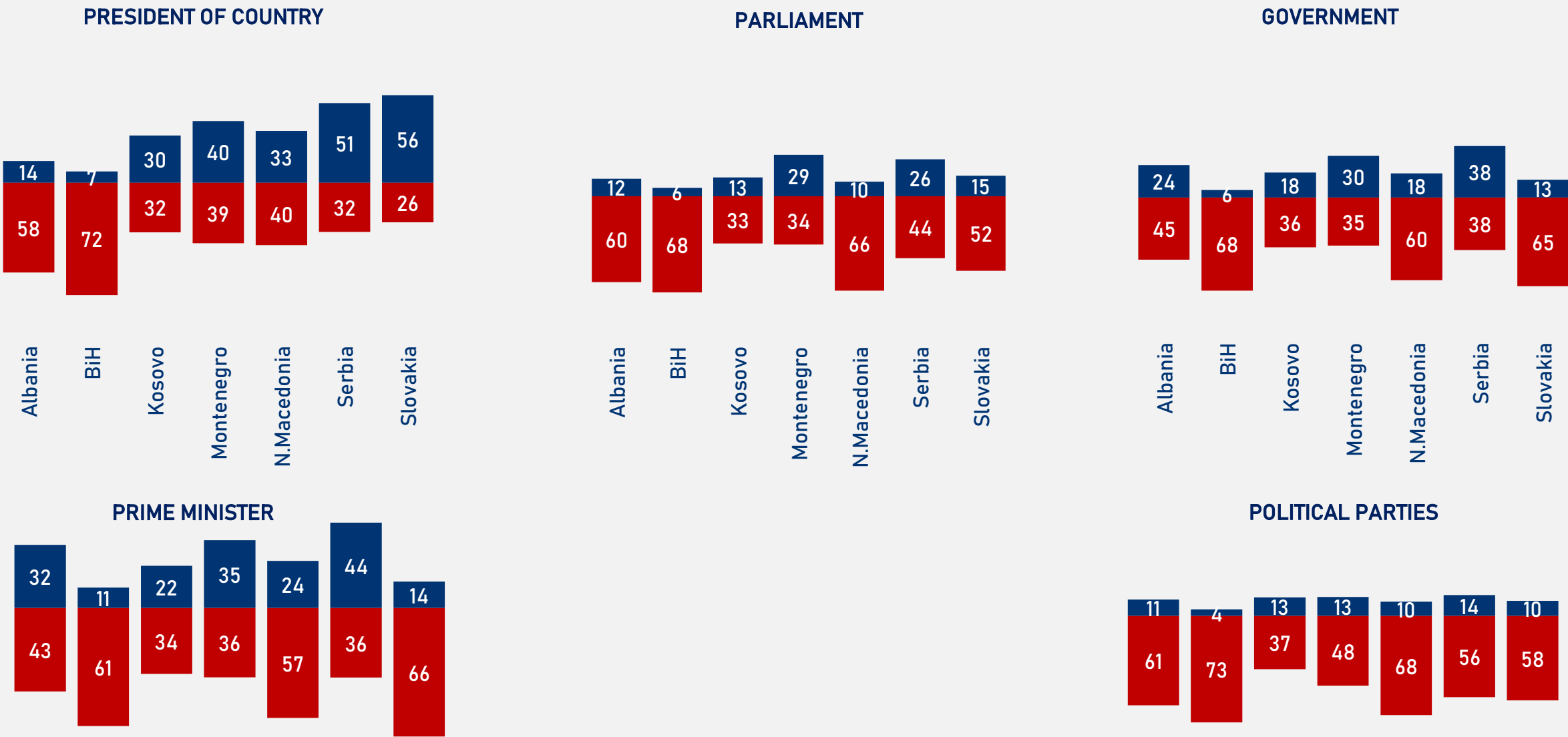
- Security and law enforcement are more highly regarded than political institutions, judicial bodies, and government ministries responsible for social services like healthcare and education.
- Foreign investment is perceived to benefit high-level government officials and not seed broader economic development.
- Between one-fifth and one-third of respondents noted their own jobs in the public or private sector came about through nepotism. In Kosovo, the rate of self-reported nepotism in the private sector is 50%.
- Workforce emigration is a salient political and economic issue.

GENERAL SATISFACTION VARIES SUBSTANTIALLY BY COUNTRY



CITIZENS ARE LARGELY DISSATISFIED WITH REPRESENTATIVE INSTITUTIONS

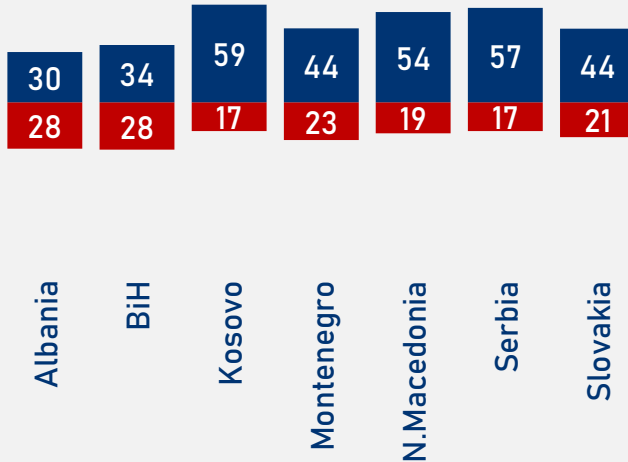
To what extent are you satisfied with the work of the following institutions?



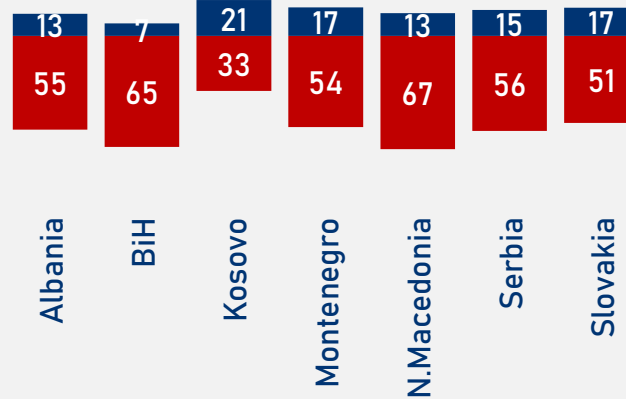
DEFENSE AND LAW ENFORCEMENT ARE MORE ESTEEMED THAN JUDICIAL BODIES OR SOCIAL SERVICES

To what extent are you satisfied with the work of the following institutions?

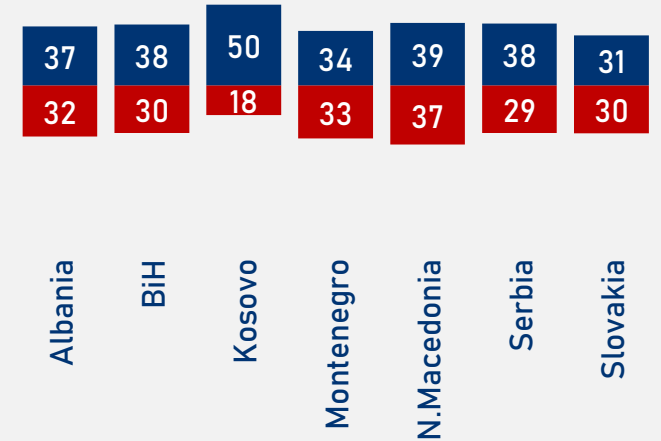
ARMY



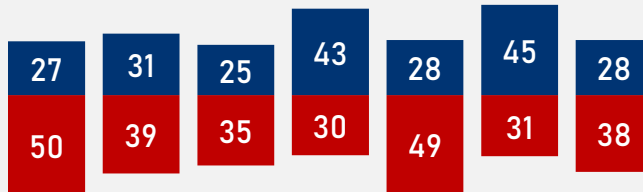
JUDICIARY



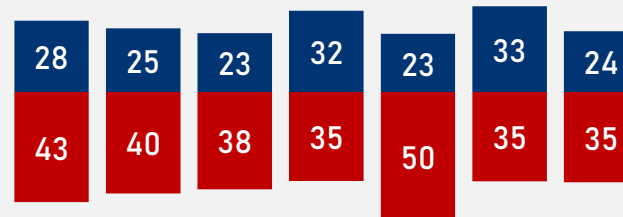
POLICE



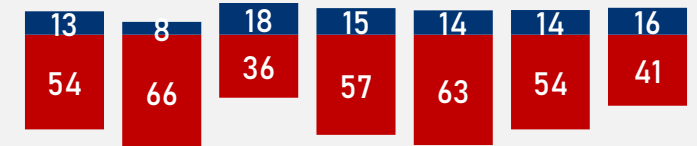
HEALTH CARE



EDUCATION



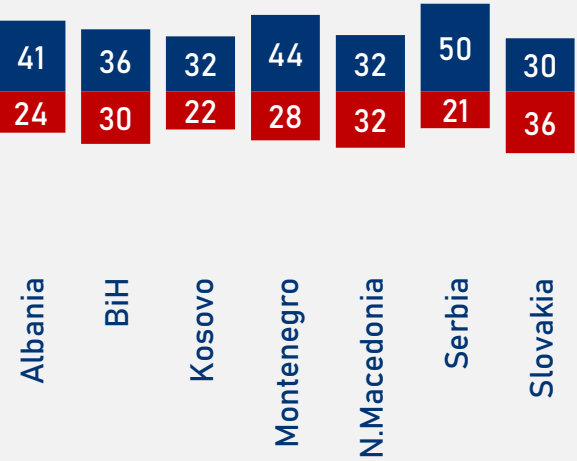
PROSECUTION



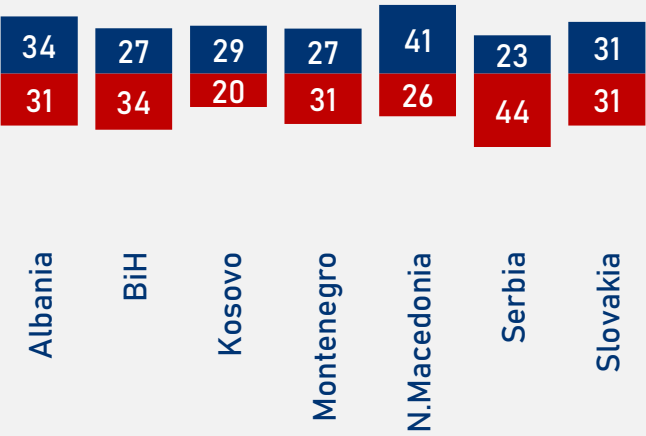
PUBLIC SENTIMENT ON CIVIC, SOCIAL, AND CULTURAL BODIES IS MIXED

To what extent are you satisfied with the work of the following institutions?

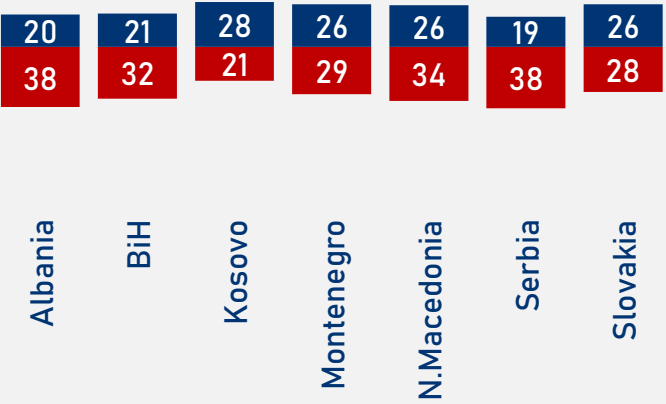
RELIGIOUS INSTITUTIONS



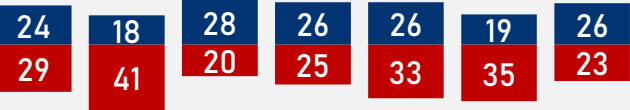
MEDIA



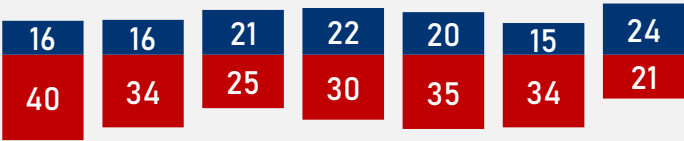
CIVIL SOCIETY



INTERNATIONAL ORGANIZATIONS

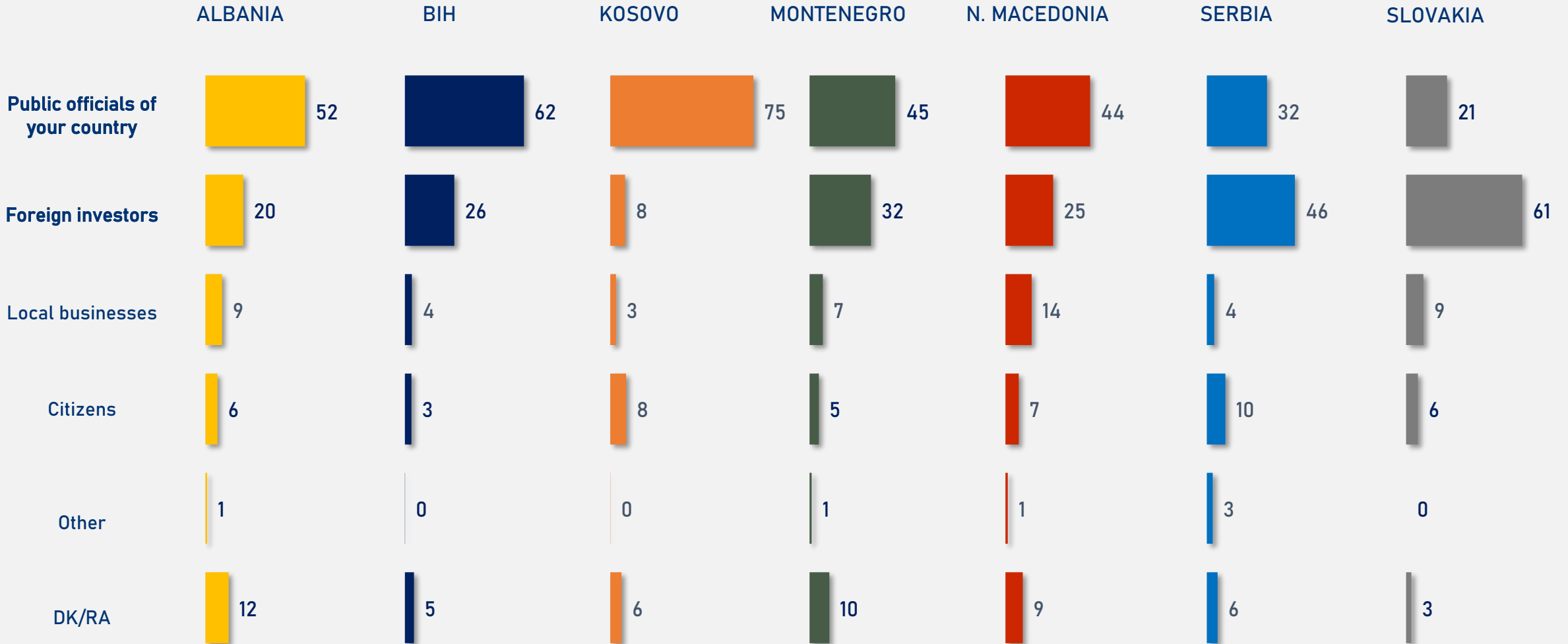


INDEPENDENT INSTITUTIONS



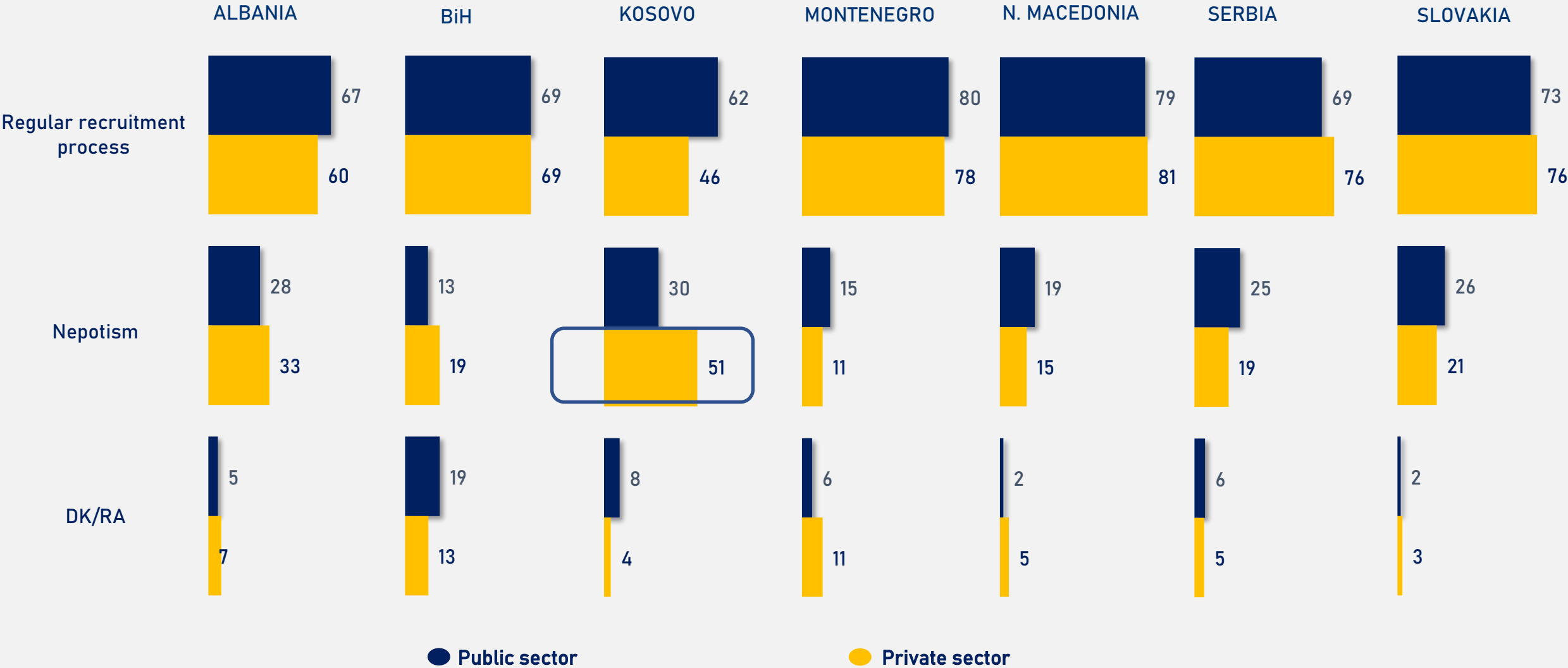
CITIZENS LINK FOREIGN INVESTMENT TO ELITE PROFIT RATHER THAN ECONOMIC DEVELOPMENT

In your opinion, who benefits from foreign investment the most?



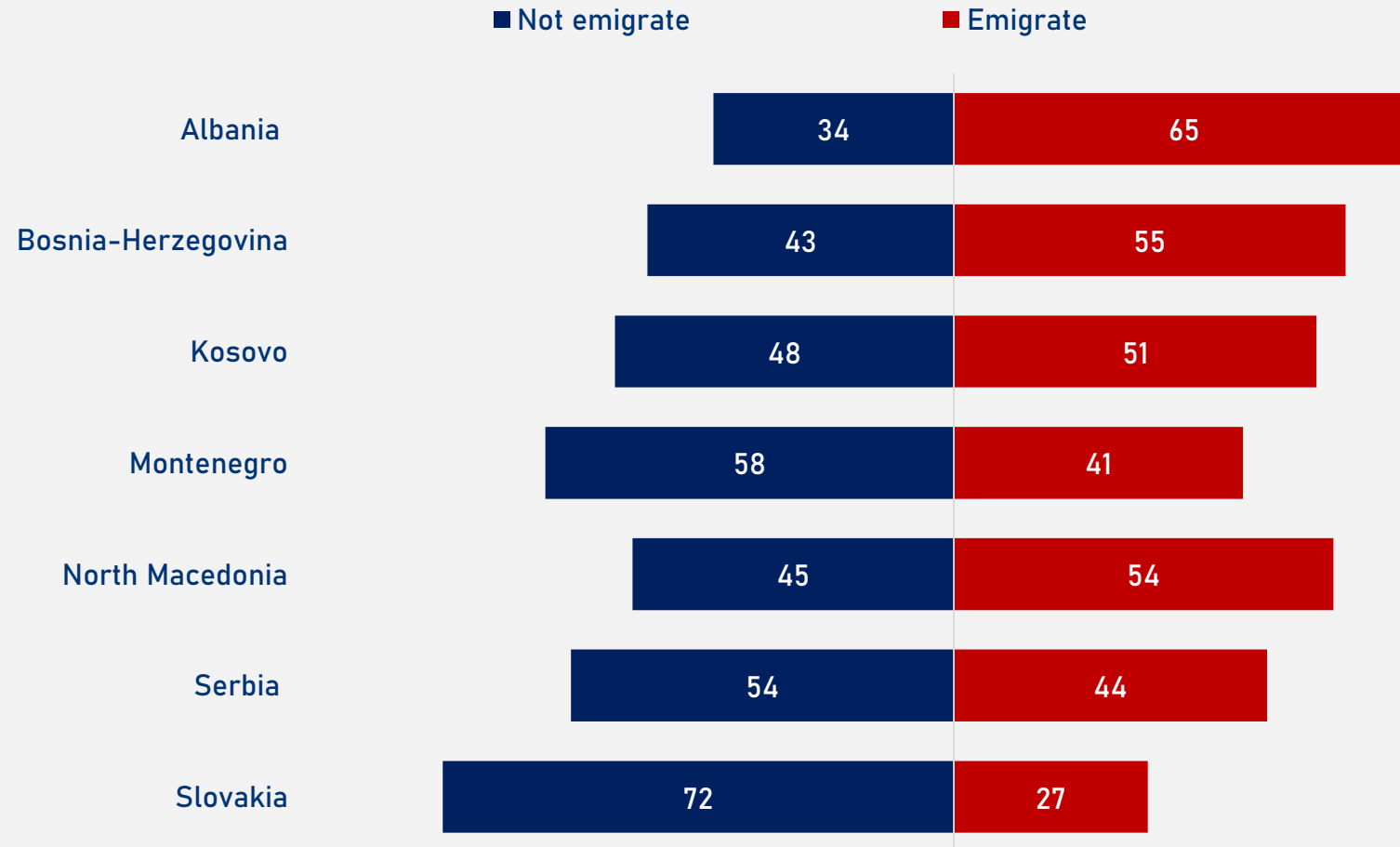
SELF-REPORTED NEPOTISM IN EMPLOYMENT IS EVIDENT

Are you employed (officially or unofficially)? How did you obtain your last employment?



WORKFORCE EMIGRATION IS A SALIENT POLITICAL AND ECONOMIC ISSUE, EXCEPT IN MONTENEGRO, SERBIA AND SLOVAKIA

Are you considering or have you already made plans to leave the country?



PUBLIC ATTITUDES ON FOREIGN ACTORS

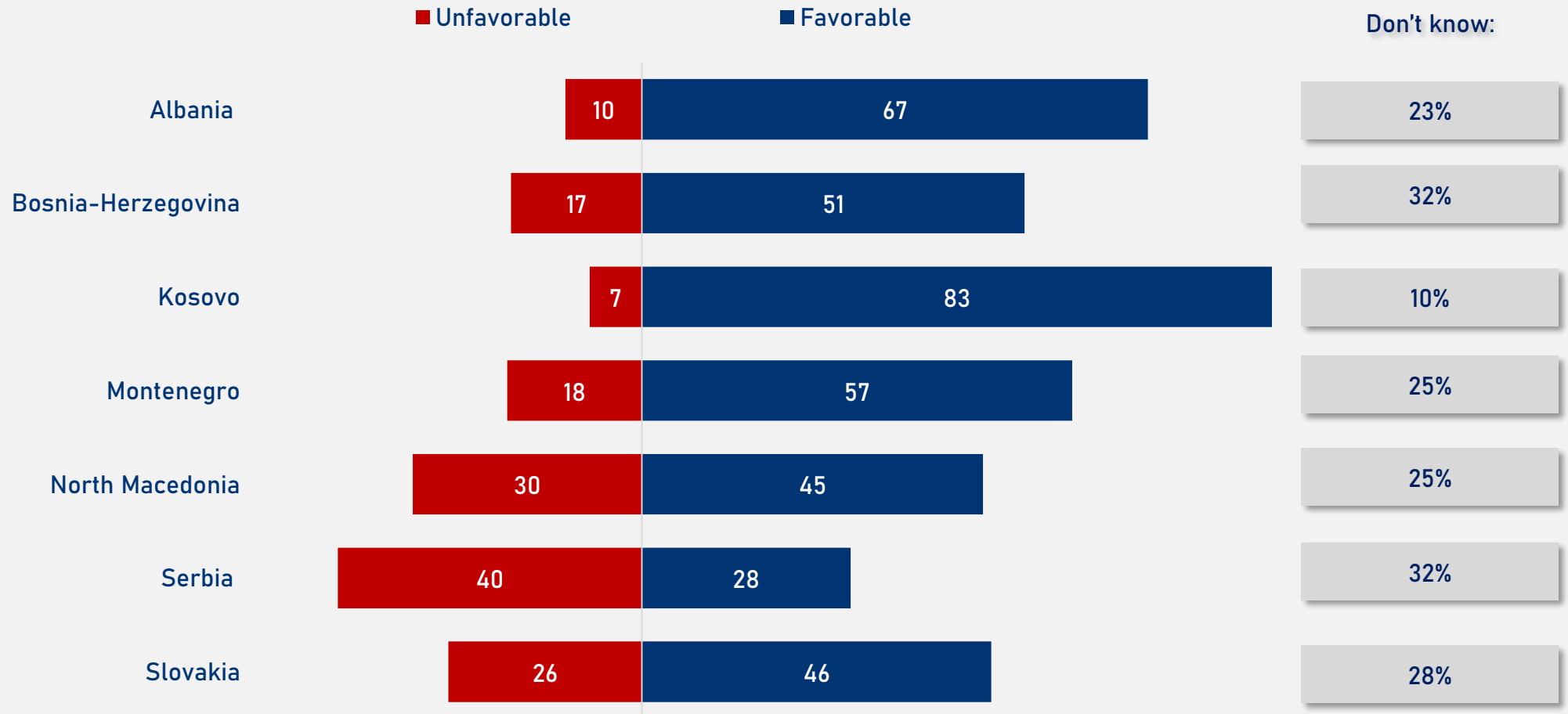
FOREIGN ACTOR TAKEAWAYS

- EU favorability is generally robust with weakening support in North Macedonia and high unfavorability in Serbia, which would not opt to join the EU if it meant spoiling relations with either Russia or China.
- U.S. and NATO favorability rating generally align and are seen favorably throughout the region—with Serbia and Slovakia as exceptions.
- Russia favorability is strong in Serbia, Montenegro, and North Macedonia.
- China favorability is evident in Serbia, Montenegro, and North Macedonia.
- The U.S./EU are seen as offering the most support, including financial assistance—except in Serbia.
- Kosovo prioritizes relations with U.S. over EU; Albania prioritizes EU integration.
- Public views on security alliances split between NATO membership and neutrality—with the exception of Serbia, where neutrality predominates. Support for NATO within member countries is mixed.

EUROPEAN UNION

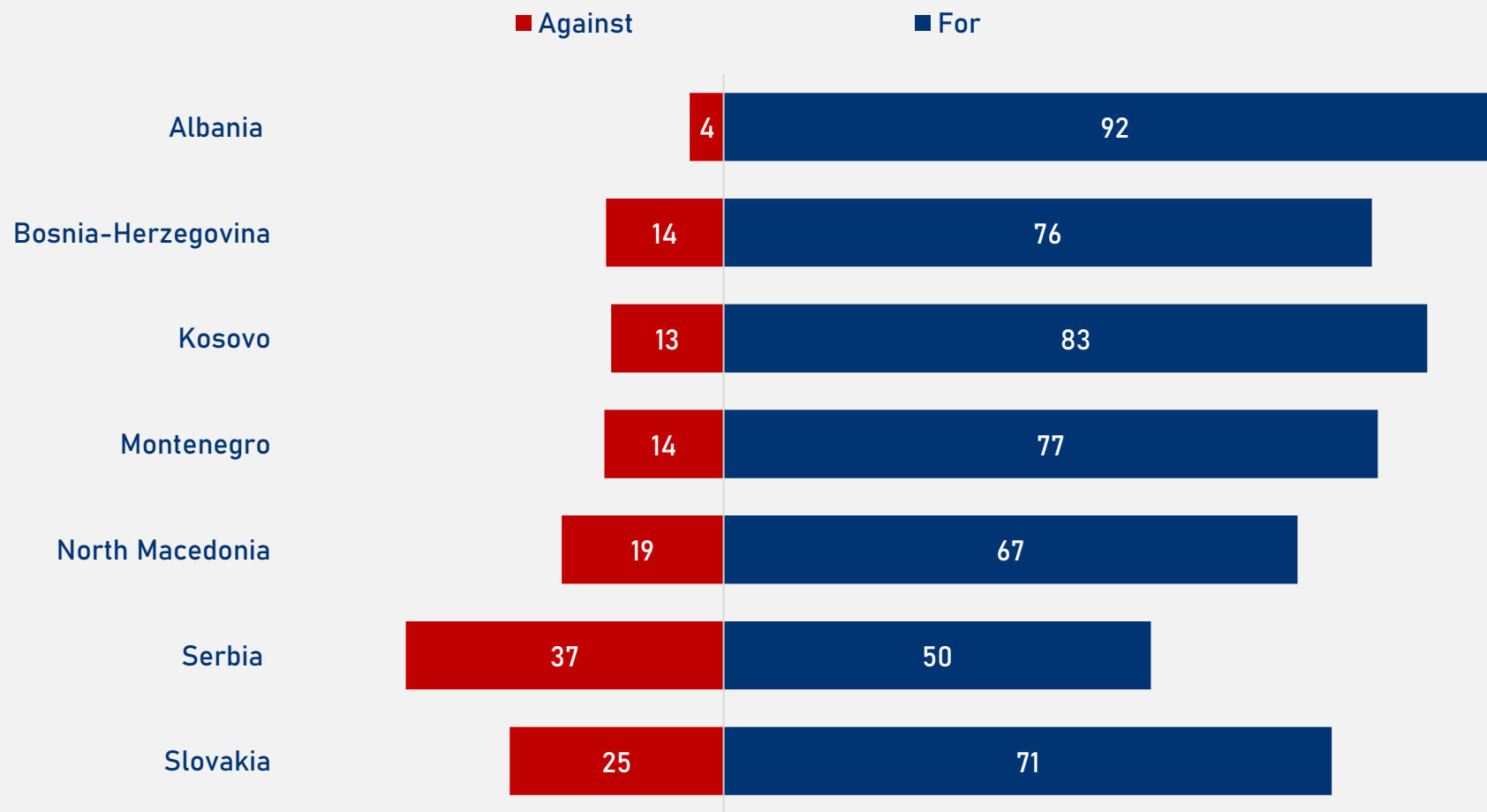
MAJORITIES EXPRESS FAVORABLE OPINION, EXCEPT IN SERBIA

What is your opinion about the European Union?



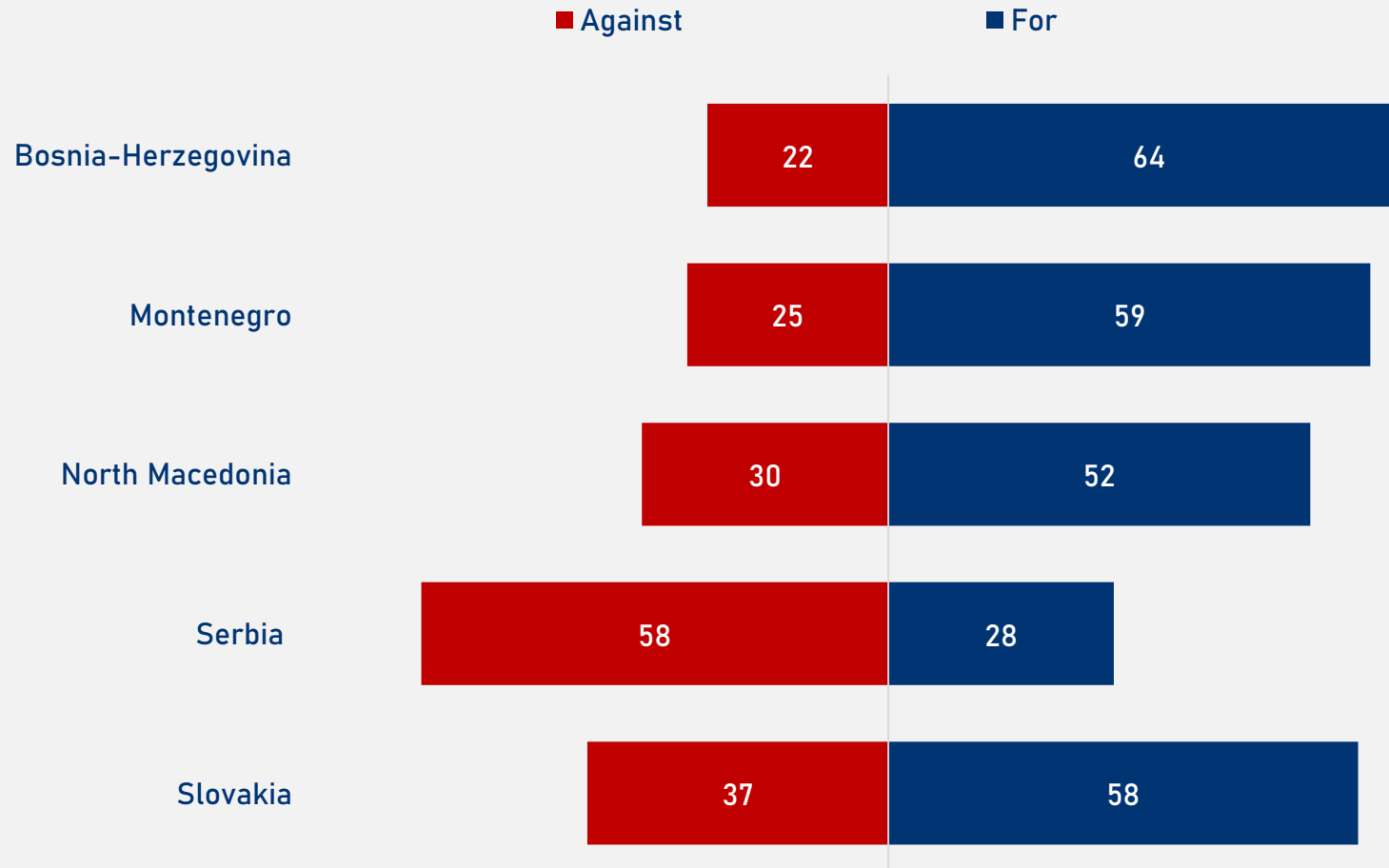
CITIZENS WOULD VOTE FOR EU MEMBERSHIP

If the referendum for EU membership of your country was held this Sunday, how would you vote?



CITIZENS PRIORITIZE EU MEMBERSHIP OVER RELATIONS WITH RUSSIA, EXCEPT IN SERBIA

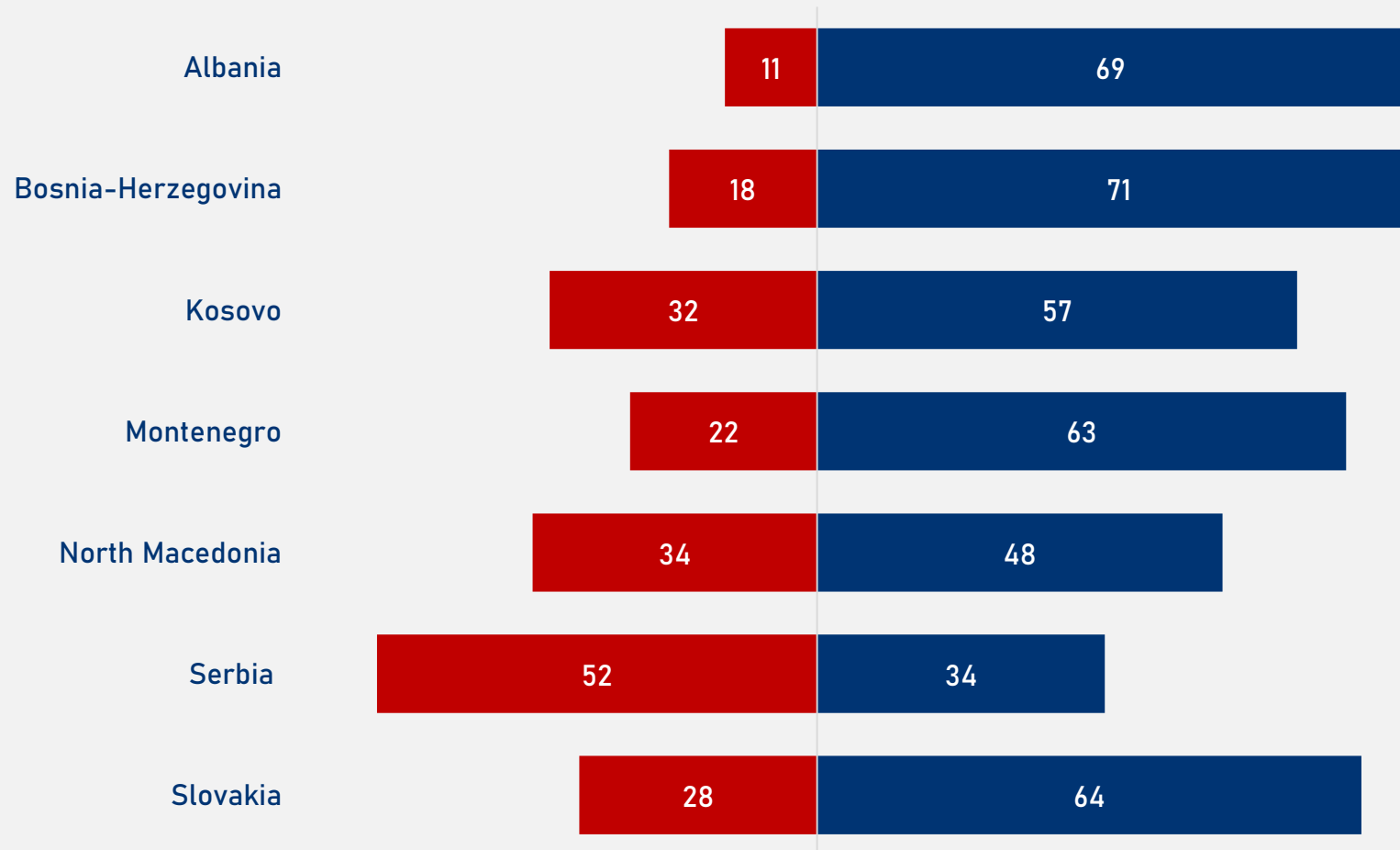
If the referendum for EU membership were held this Sunday, but joining the EU also means spoiling/ruining the relationship with Russia, how would you vote?



CITIZENS PRIORITIZE EU MEMBERSHIP OVER RELATIONS WITH CHINA, EXCEPT IN SERBIA

Which of the following two options is more acceptable to you personally?

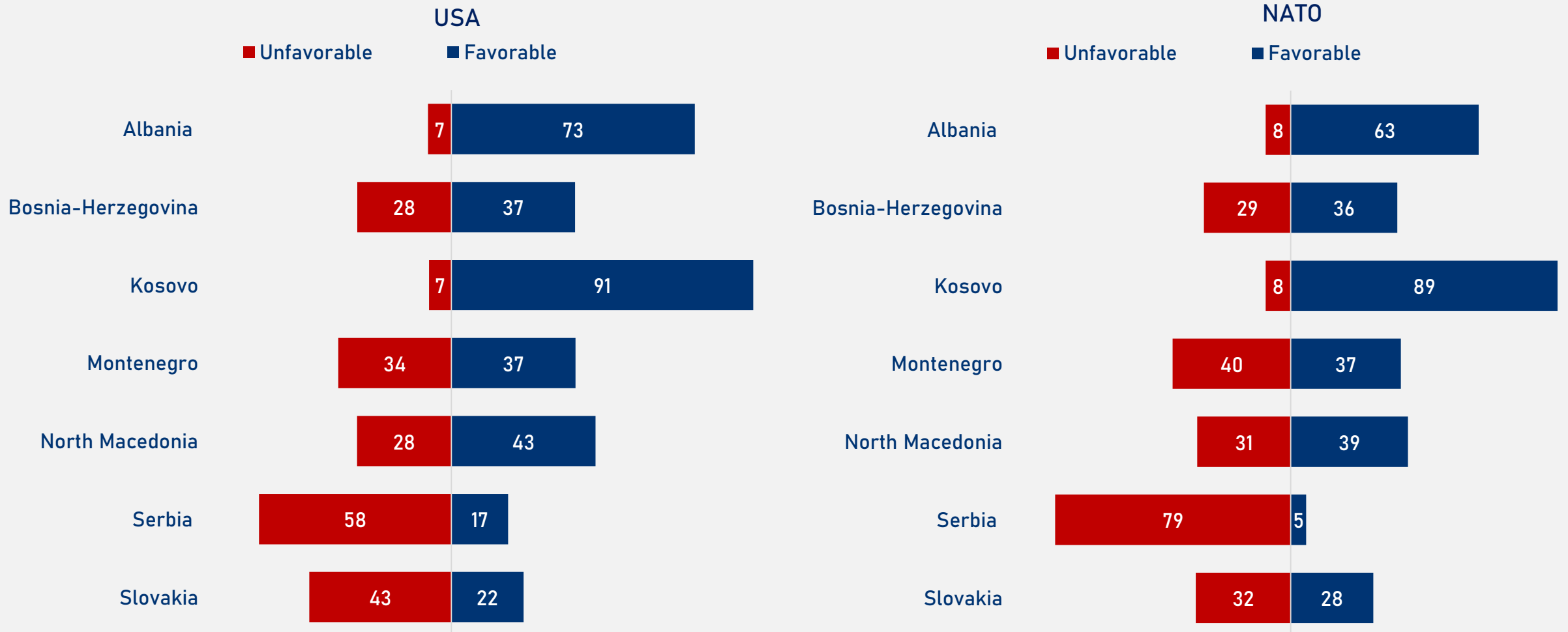
- Country should not follow its European path if it means spoiling its good relations with China
- Country should follow its European path even if it means spoiling its good relations with China



U.S./NATO

FAVORABILITY GENERALLY ALIGNS AND TRENDS POSITIVE, EXCEPT IN SERBIA AND SLOVAKIA

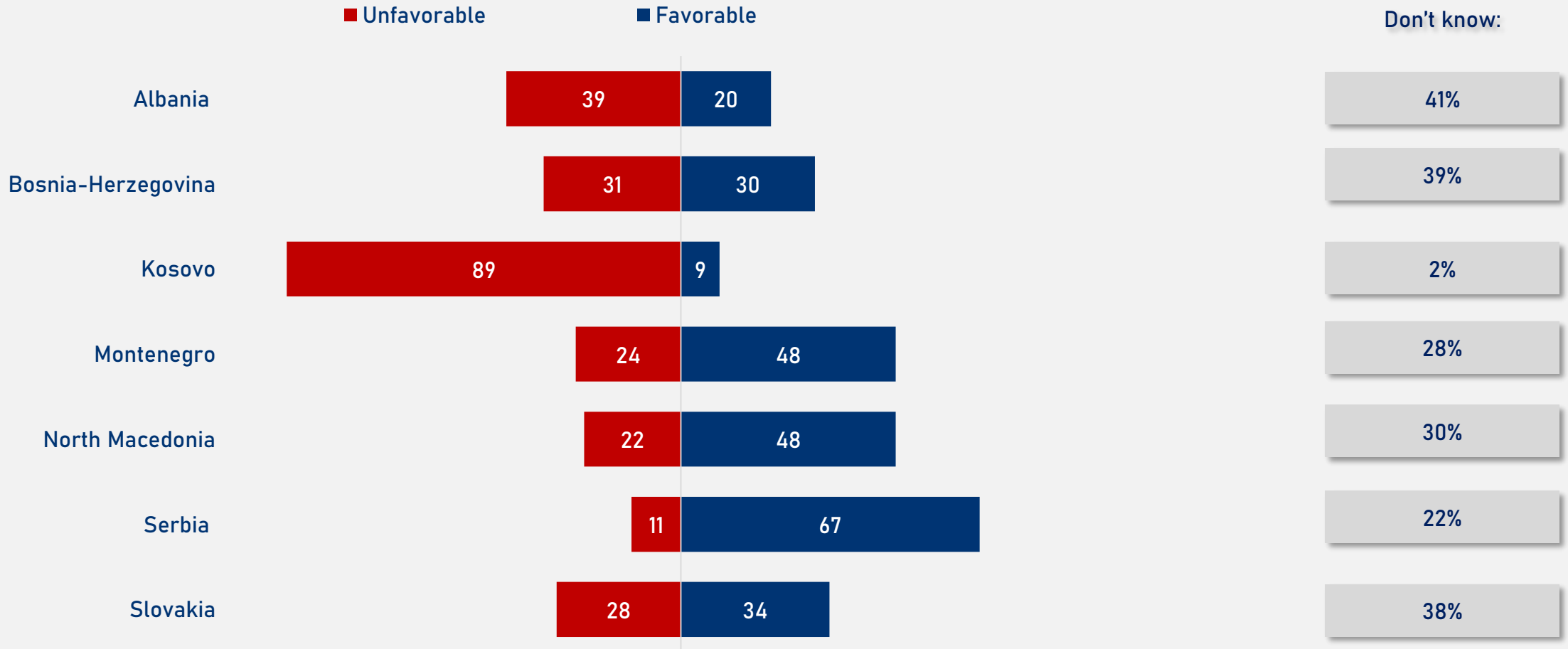
What is your opinion about the United States? What is your opinion about NATO?



RUSSIA

FAVORABLE RATINGS IN SERBIA, NORTH MACEDONIA, AND MONTENEGRO

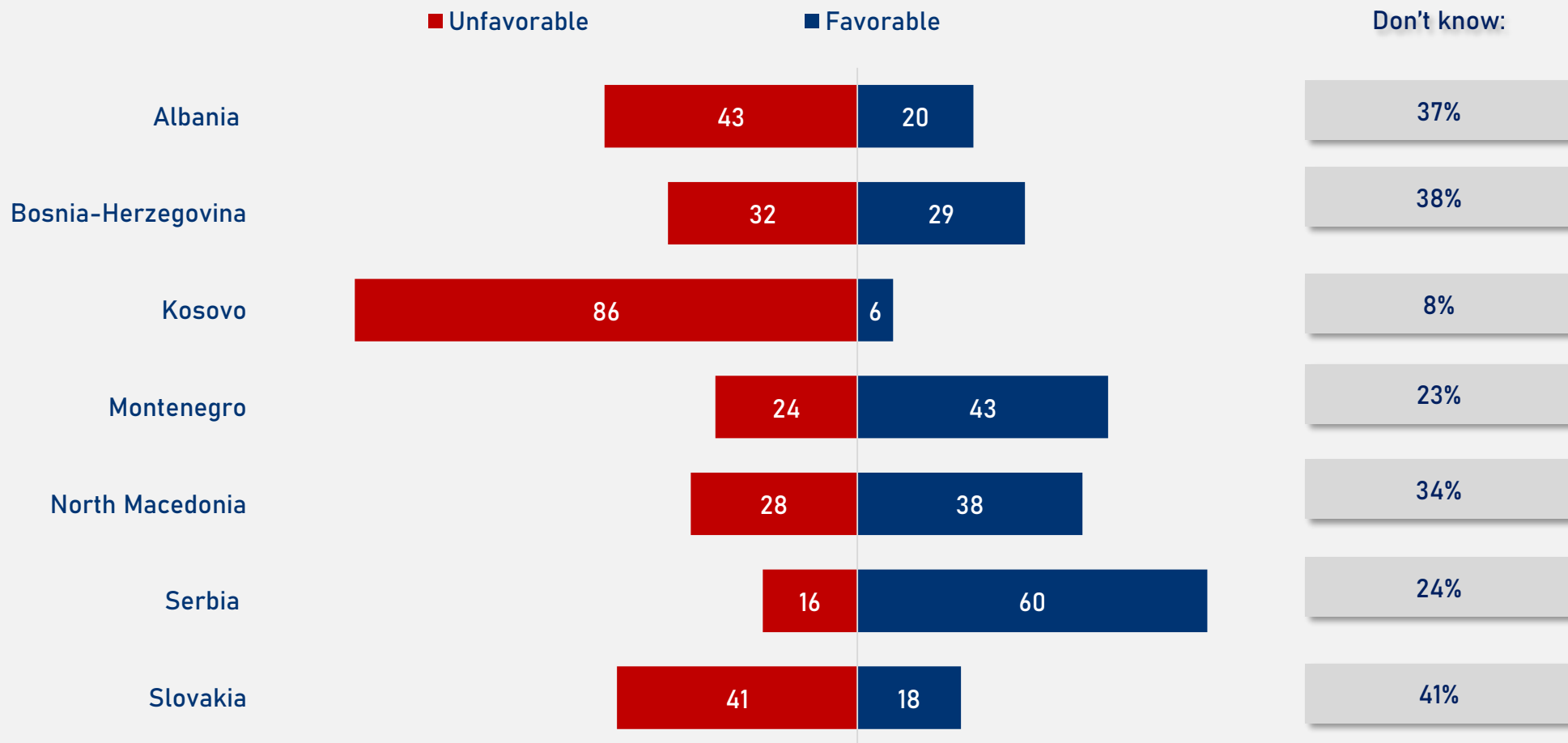
What is your opinion about Russia?



CHINA

FAVORABLE RATINGS IN SERBIA, MONTENEGRO, AND NORTH MACEDONIA

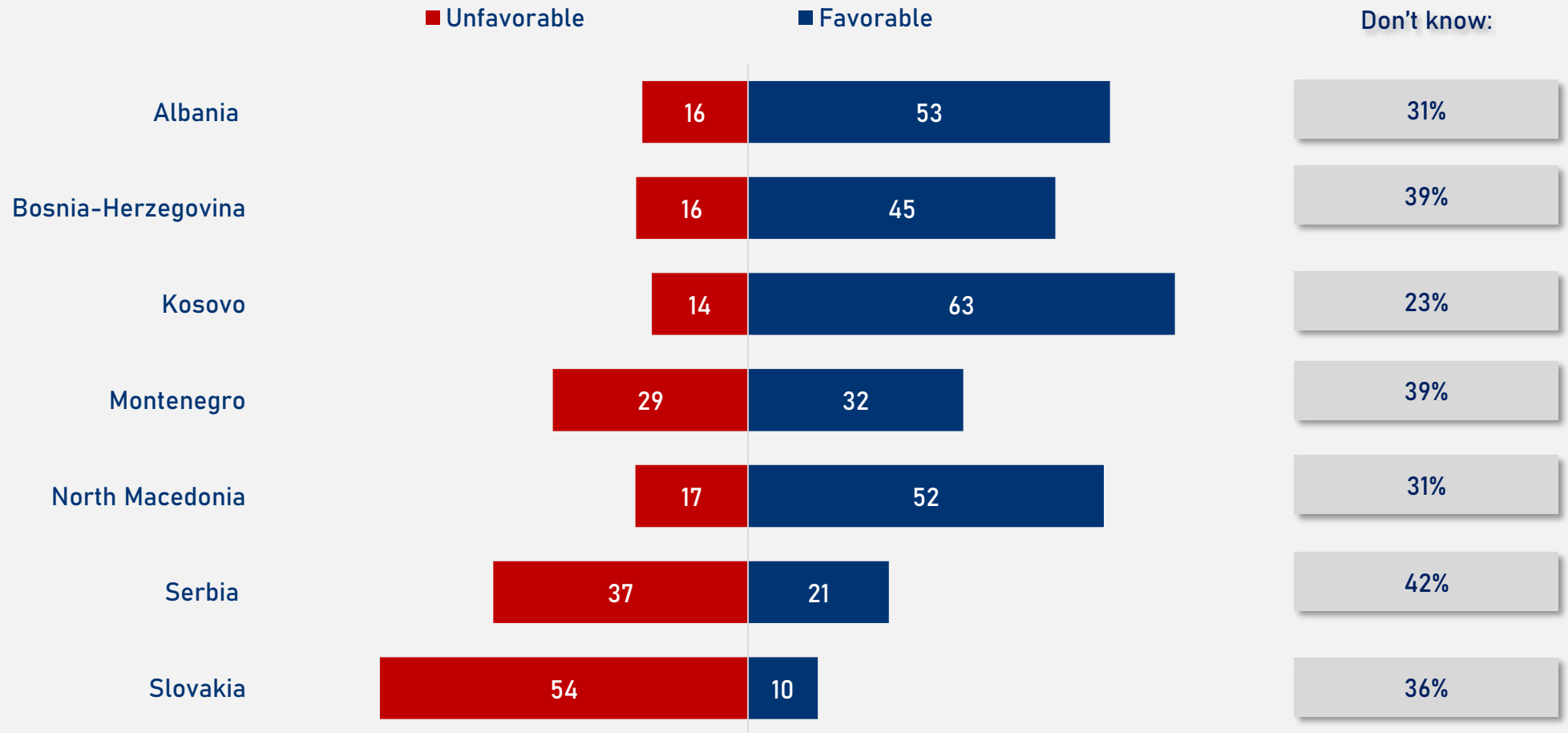
What is your opinion about China?



TURKEY

FAVORABLE RATINGS, EXCEPT IN SERBIA AND SLOVAKIA

What is your opinion about Turkey?



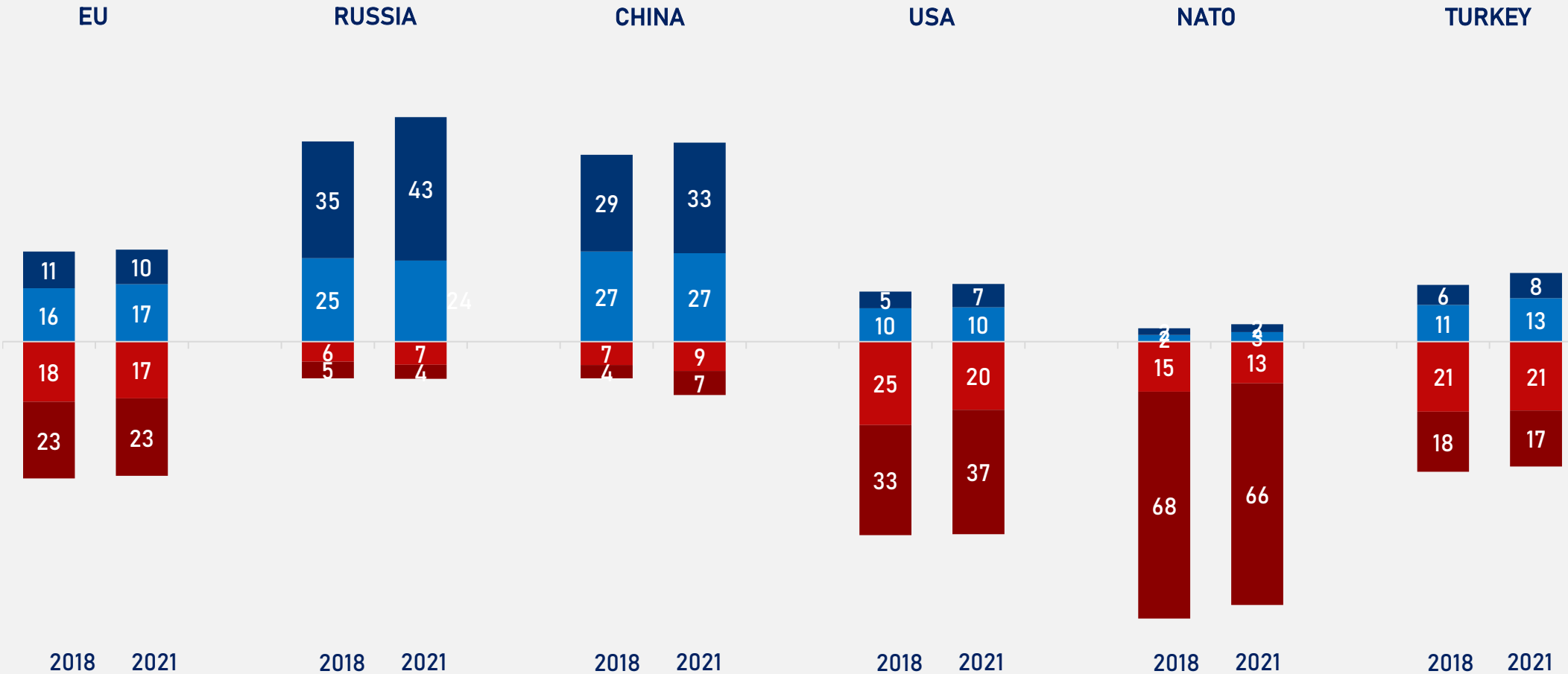
SERBIA

RUSSIA AND CHINA RETAIN STRONG FAVORABLE RATINGS BETWEEN 2018-2021

Observed in general, how would you evaluate your opinion about the following states and international institutions?

Total: Favorable

Total: Unfavorable



Russia/China/Turkey
relative favorability:
66+ y.o., less educated,
Central Serbia, rural, media
group 1, voters of SNS, SPS.

EU, US, NATO relative
favorability:
18-39 y.o., minorities, media
group 2, voters of SSP, Ne
davimo Beograd.

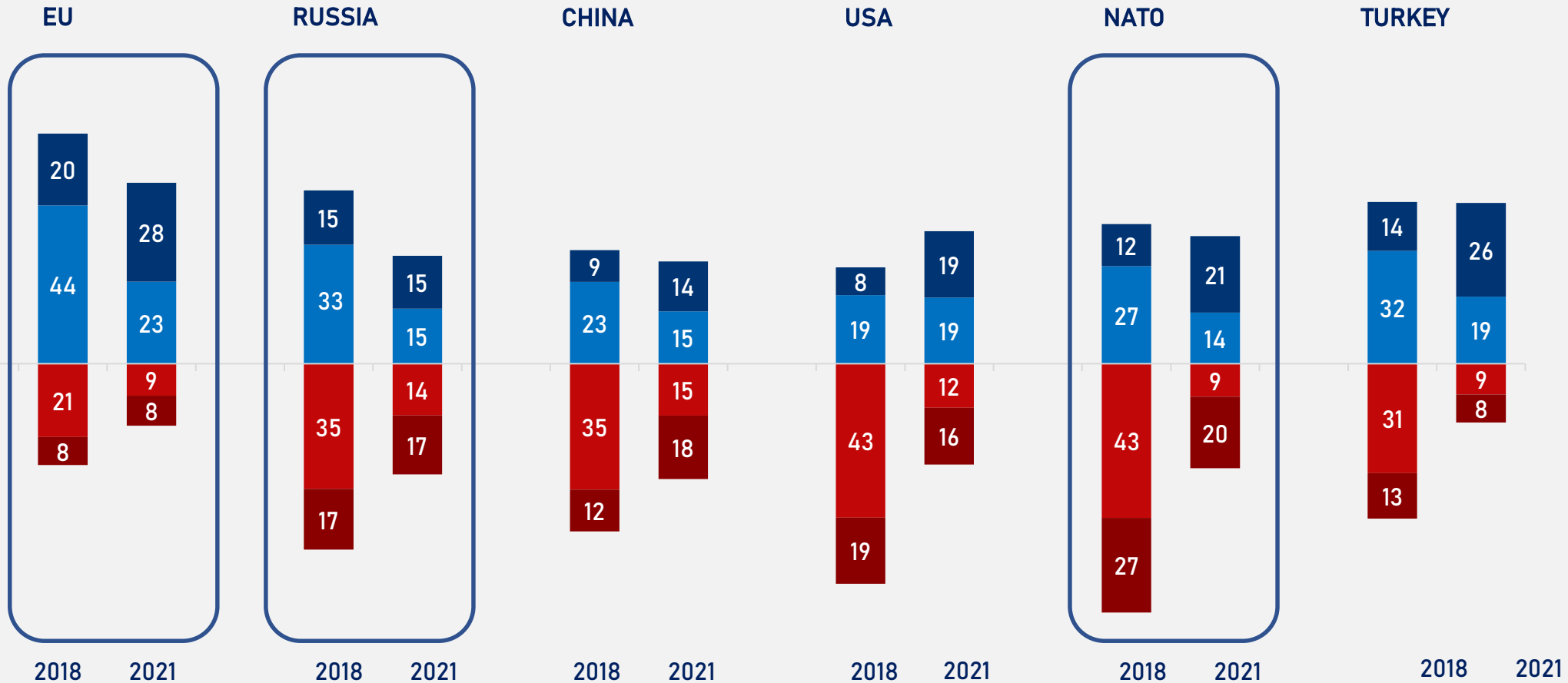
BOSNIA-HERZEGOVINA

RATING BANDS NARROW FROM 2018 TO 2021

Observed in general, how would you evaluate your opinion about the following states and international institutions?

Total: Favorable

Total: Unfavorable



China and Russia relative favorability:
male, Serb, Republic of Srpska, consumers of RTRS, BNTV, Syri Tv, Ora News

EU, U.S., NATO and Turkey relative favorability:
male, 18-29 y.o., Bosniak consumers of Federalna, N1, Avaz.ba. Klix.ba, SDA voters

MONTENEGRO

RATING BANDS TREND MORE FAVORABLE FROM 2018 TO 2021

Observed in general, how would you evaluate your opinion about the following states and international institutions?

Total: Favorable

Total: Unfavorable

EU

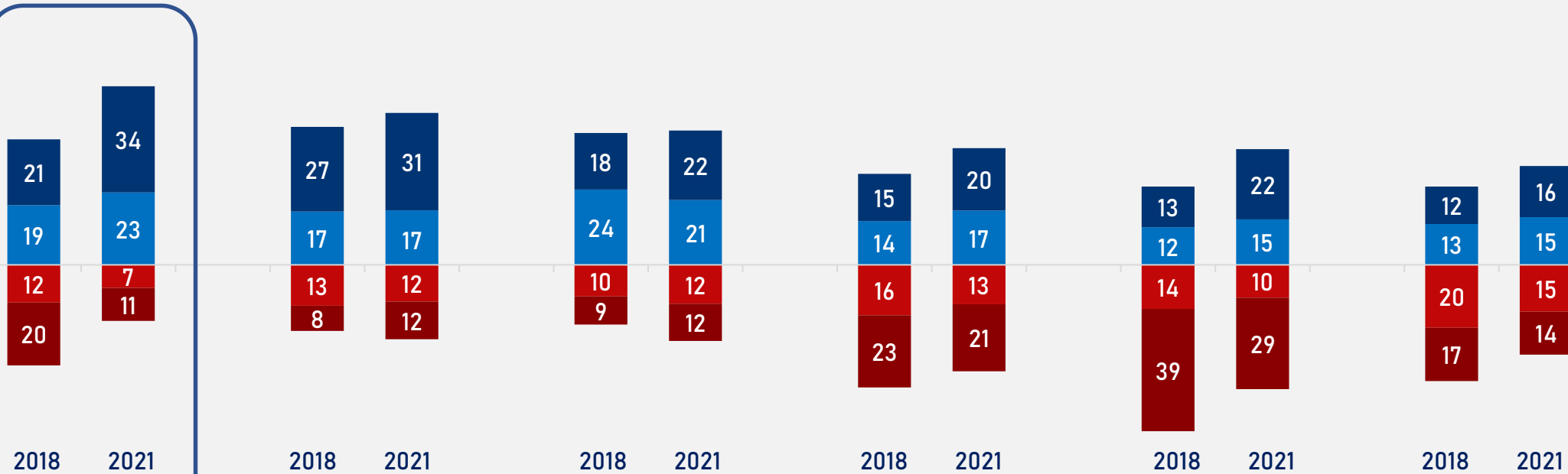
RUSSIA

CHINA

USA

NATO

TURKEY



Russia/China relative favorability: ethnic Serb, consumers of Dan, TV Vijesti, IN4S, voters of NSD, SNP, DCG

EU, US, NATO and Turkey relative favorability: Montenegrin, Albanian, Muslim/Bosniak, RTCG/CDM, SDP and DPS voters

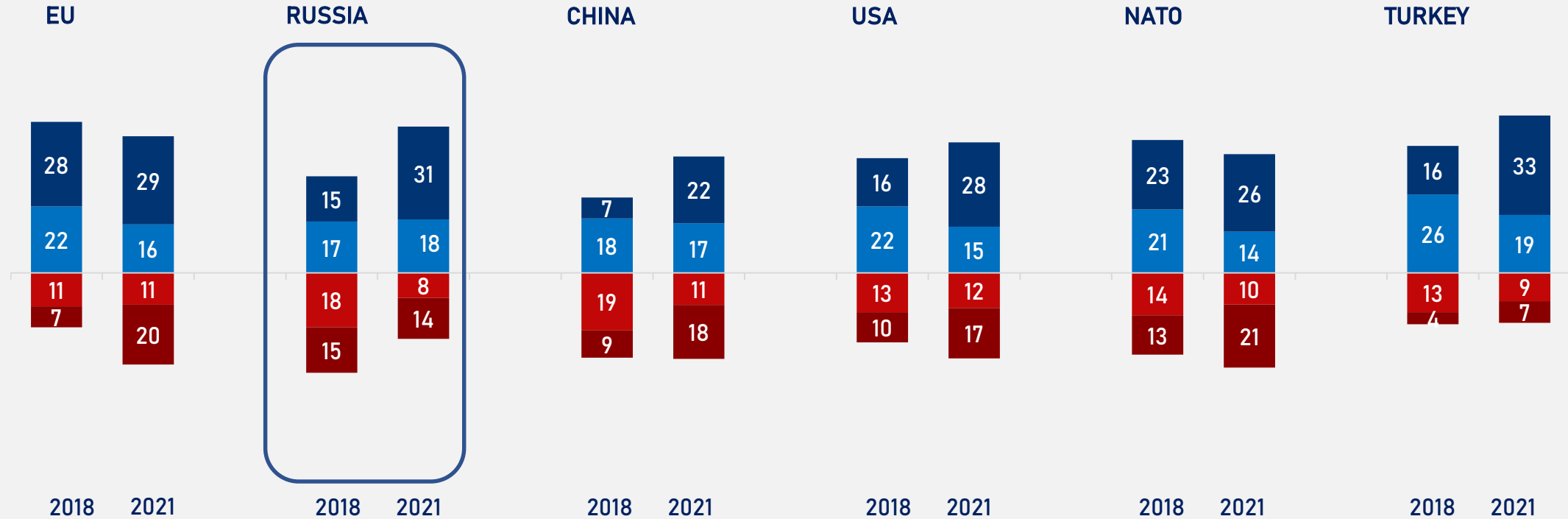
NORTH MACEDONIA

FAVORABILITY RATINGS IMPROVE FROM 2018 TO 2021, EXCEPT FOR EU AND NATO

Observed in general, how would you evaluate your opinion about the following states and international institutions?

Total: Favorable

Total: Unfavorable

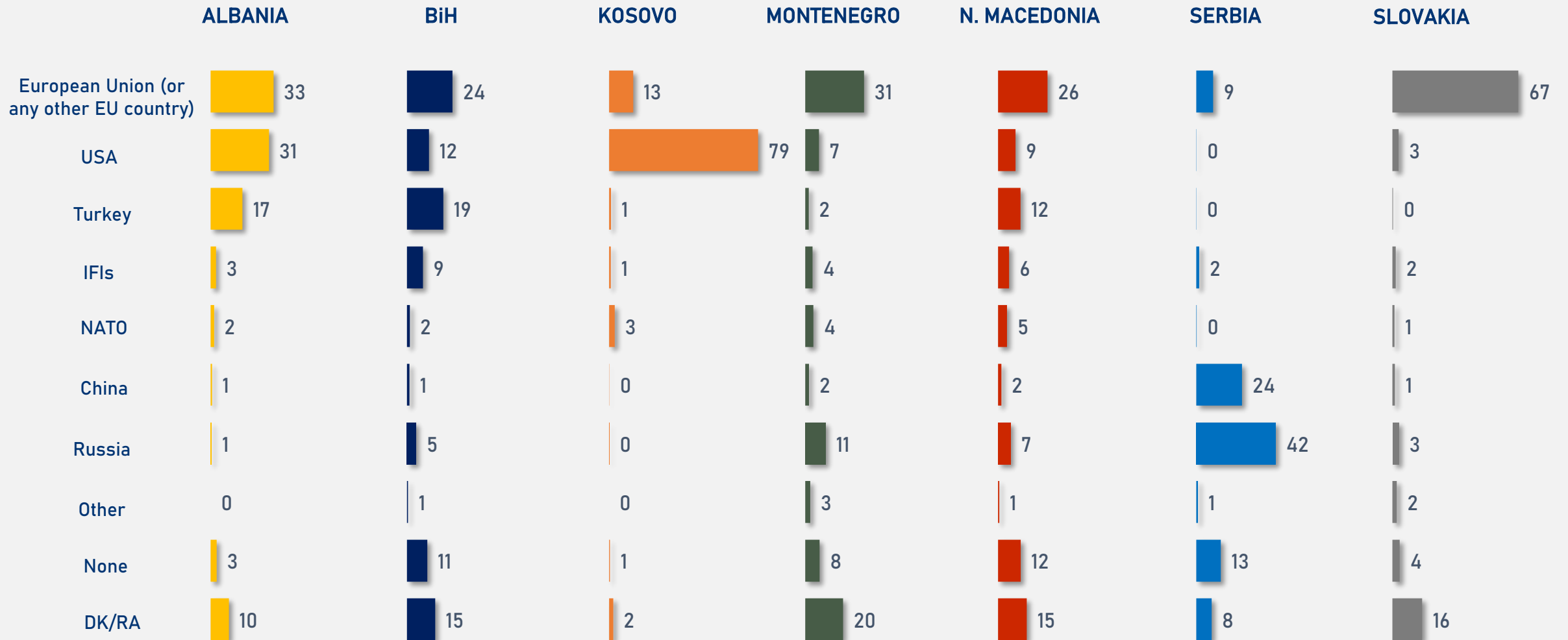


EU, U.S., NATO relative favorability:
18-29 y.o., Albanians, North-West,
rural, consumers of Alsat, MTV2,
voters of DUI, Alijansa za Albancite

Russia/China relative favorability:
ethnic Macedonians, secondary
educated, Eastern part, consumers of
Alfa, Sitel, Kanal 5, VMRO DPMNE voters

THE WEST PERCEIVED AS MOST SUPPORTIVE, EXCEPT IN SERBIA

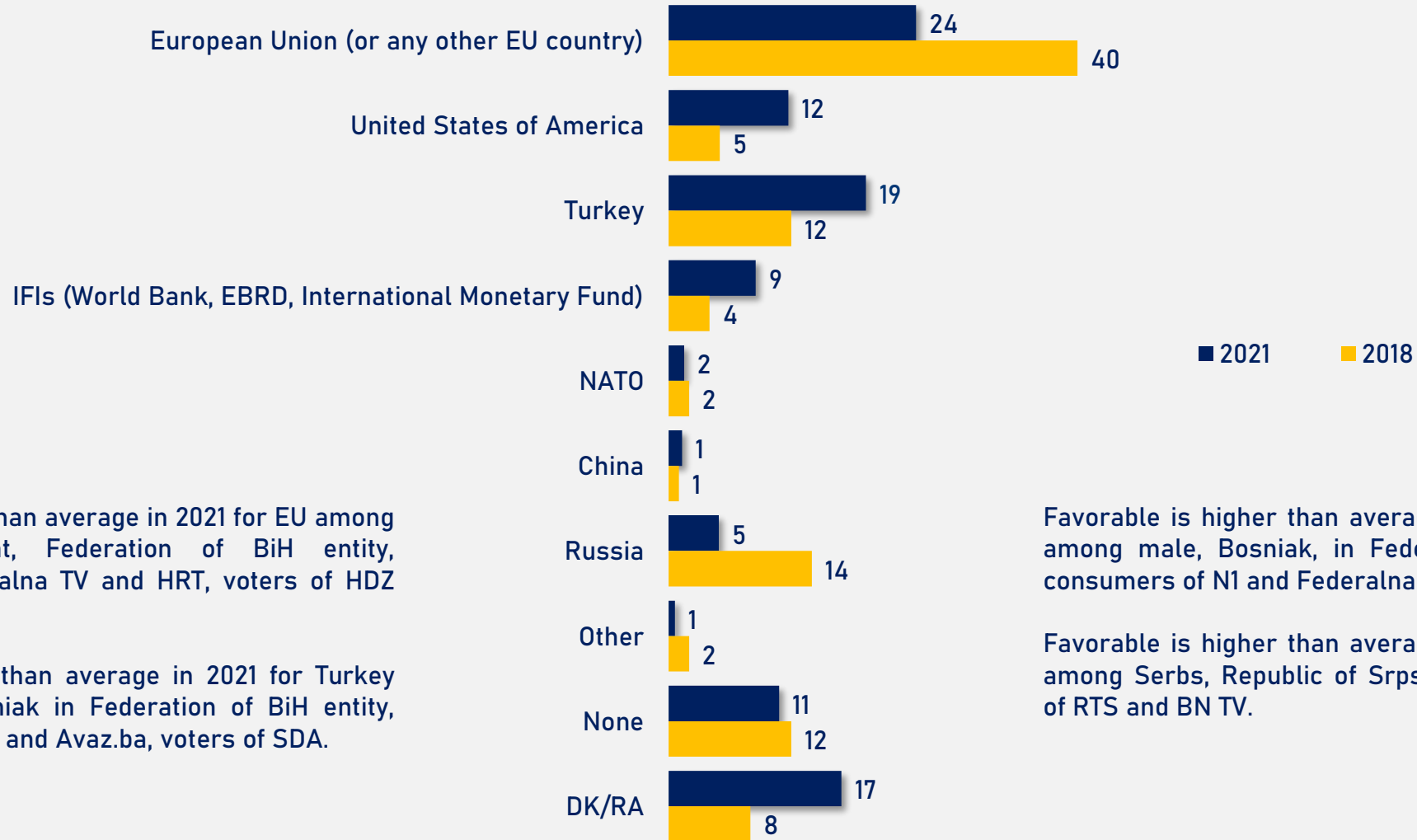
In your opinion, which country or international institution supports your country the most?



BOSNIA-HERZEGOVINA

SIGNIFICANT DROP IN PERCEPTION OF THE EU AND RUSSIA AS MOST SUPPORTIVE

In your opinion, which state or international institution supports your country the most?



Favorable is higher than average in 2021 for EU among citizens 60+, Croat, Federation of BiH entity, consumers of Federalna TV and HRT, voters of HDZ BiH.

Favorable is higher than average in 2021 for Turkey among female, Bosniak in Federation of BiH entity, consumers of Klix.ba and Avaz.ba, voters of SDA.

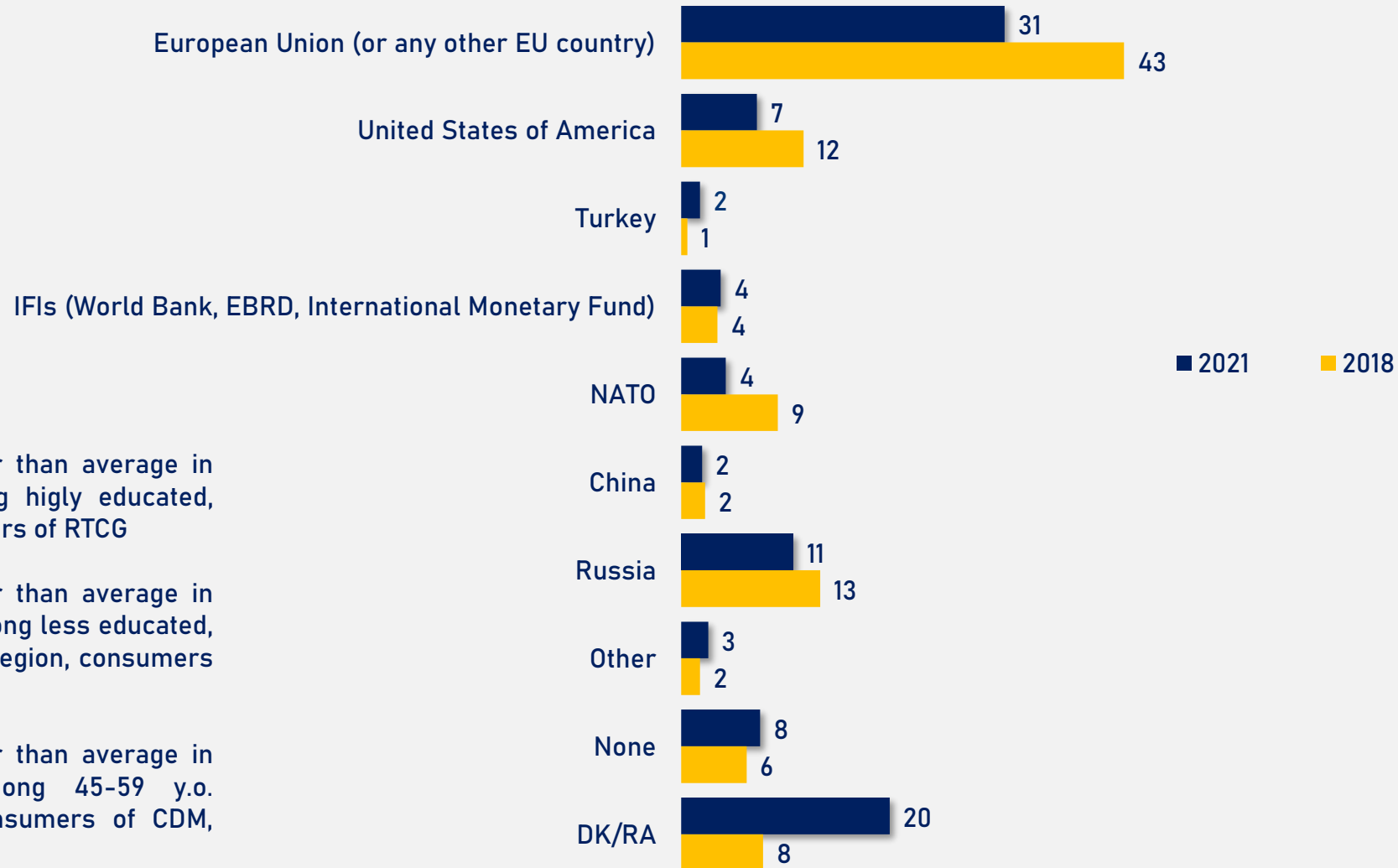
Favorable is higher than average in 2021. for the US among male, Bosniak, in Federation of BiH entity, consumers of N1 and Federalna TV,

Favorable is higher than average in 2021. for Russia among Serbs, Republic of Srpska entity, consumers of RTS and BN TV.

MONTENEGRO

SIGNIFICANT DROP IN PERCEPTION OF THE EU AS MOST SUPPORTIVE

In your opinion, which state or international institution supports your country the most?



Favorable is higher than average in 2021 for EU among highly educated, Albanians, consumers of RTCG

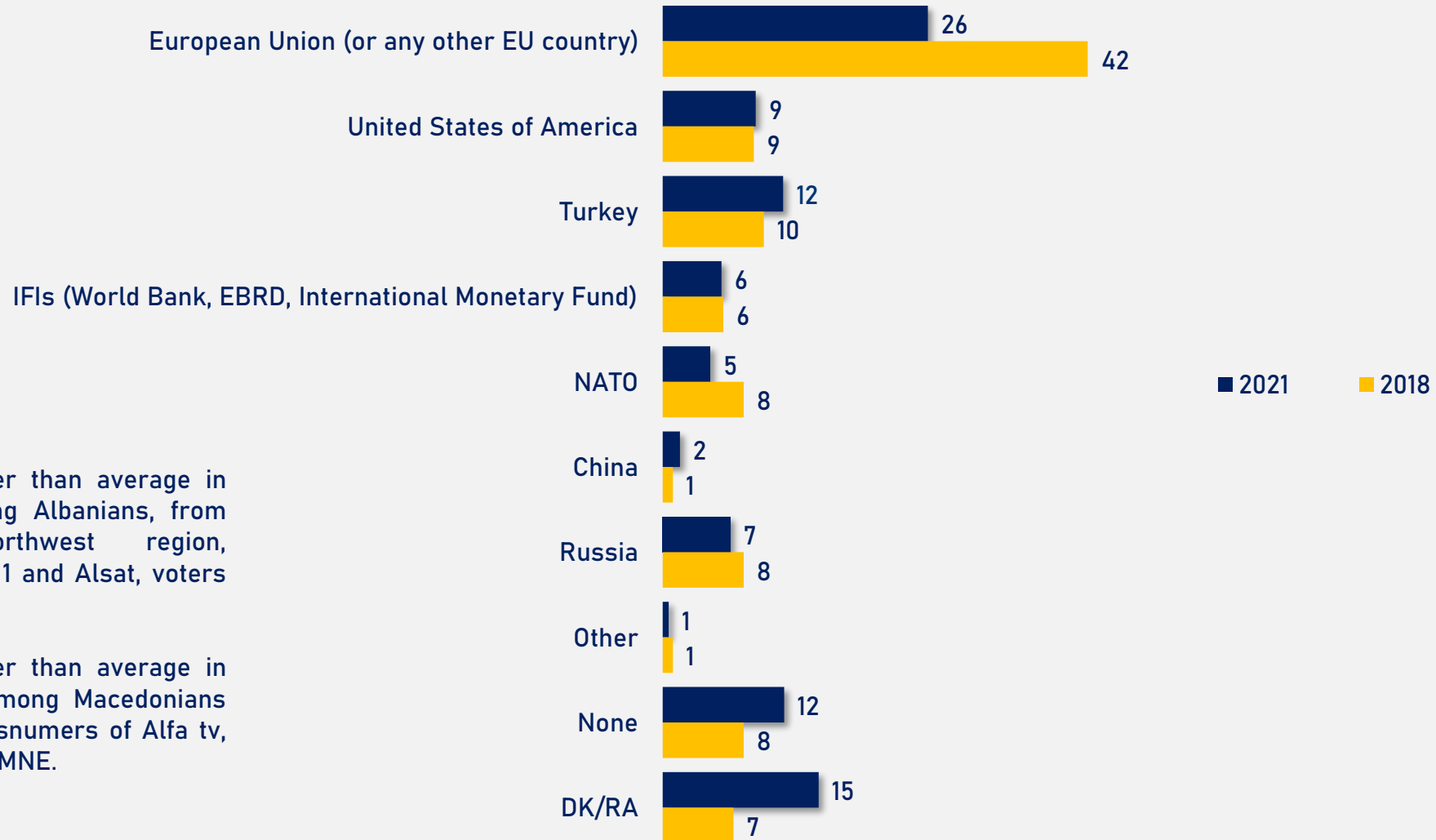
Favorable is higher than average in 2021 for Russia among less educated, Serbs, from North region, consumers of TV Vijesti

Favorable is higher than average in 2021 for US among 45-59 y.o. Montenegrins, consumers of CDM, and DPS voters

NORTH MACEDONIA

SIGNIFICANT DROP IN PERCEPTION OF THE EU AS MOST SUPPORTIVE

In your opinion, which state or international institution supports your country the most?



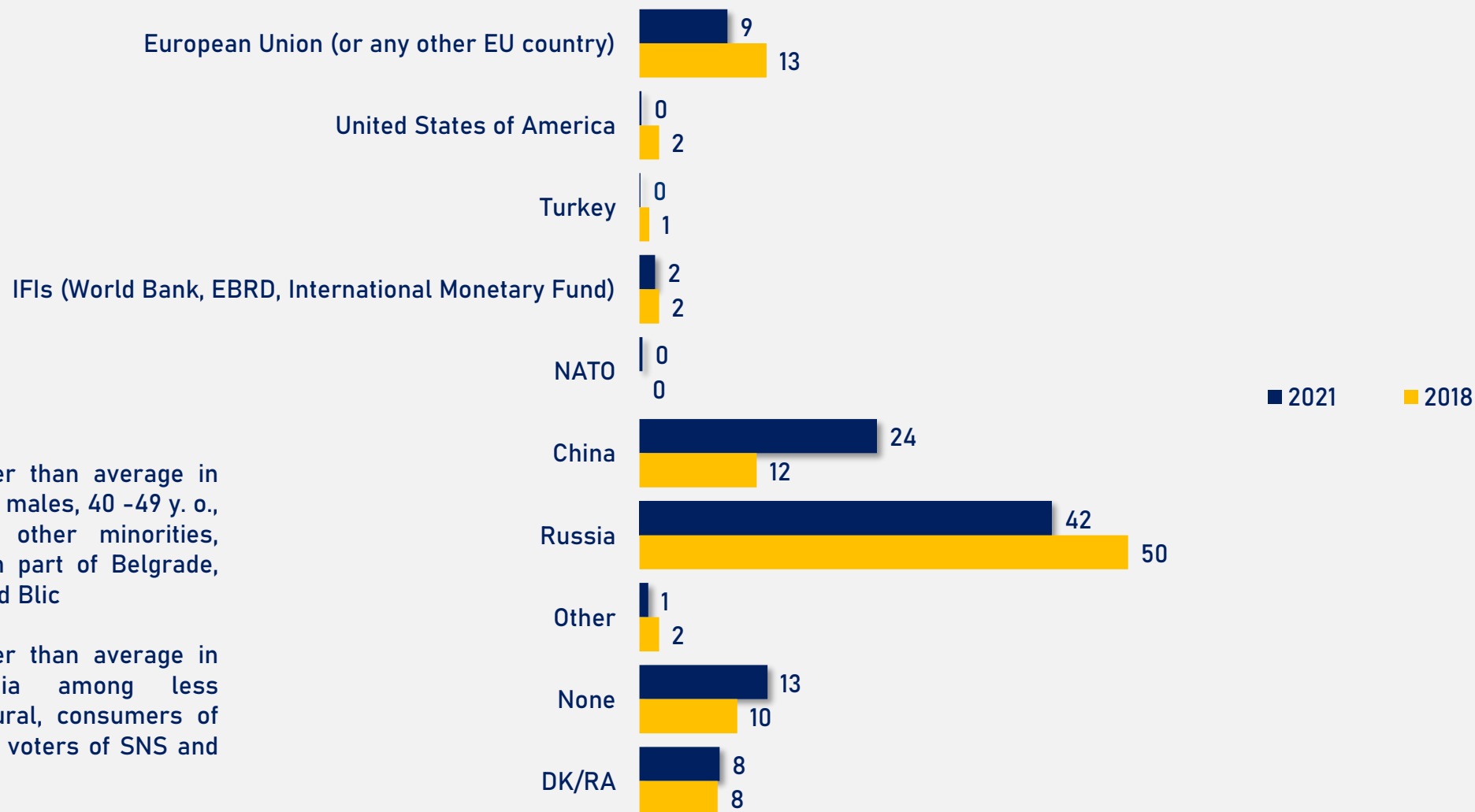
Favorable is higher than average in 2021 for EU among Albanians, from the rural Northwest region, consumers of Mtv 1 and Alsat, voters of SDSM.

Favorable is higher than average in 2021 for Russia among Macedonians from the East, consumers of Alfa tv, voters of VMRO DPMNE.

SERBIA

RUSSIA AND CHINA SEEN AS MOST SUPPORTIVE

In your opinion, which state or international institution supports your country the most?

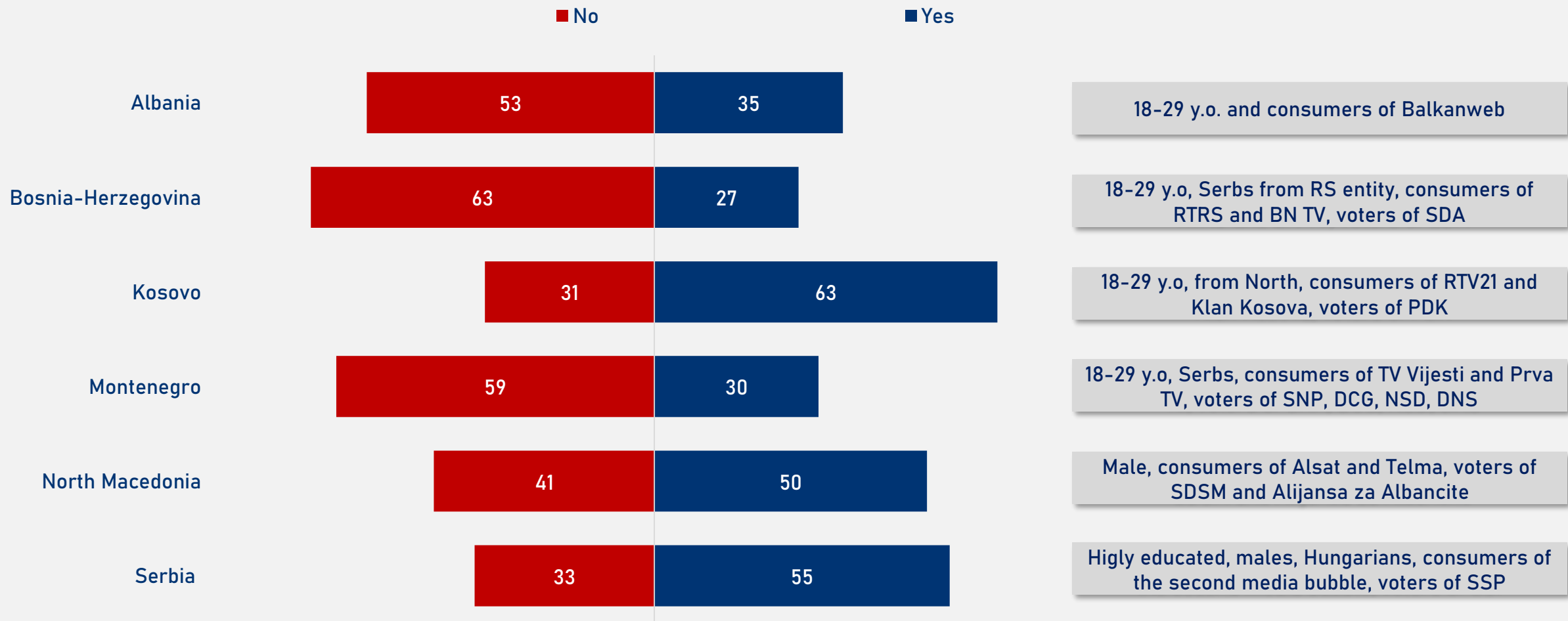


Favorable is higher than average in 2021. for EU among males, 40 -49 y. o., highly educated, other minorities, living in the urban part of Belgrade, cosumers of N1, and Blic

Favorable is higher than average in 2021. for Russia among less education, from rural, consumers of first media bubble, voters of SNS and SRS.

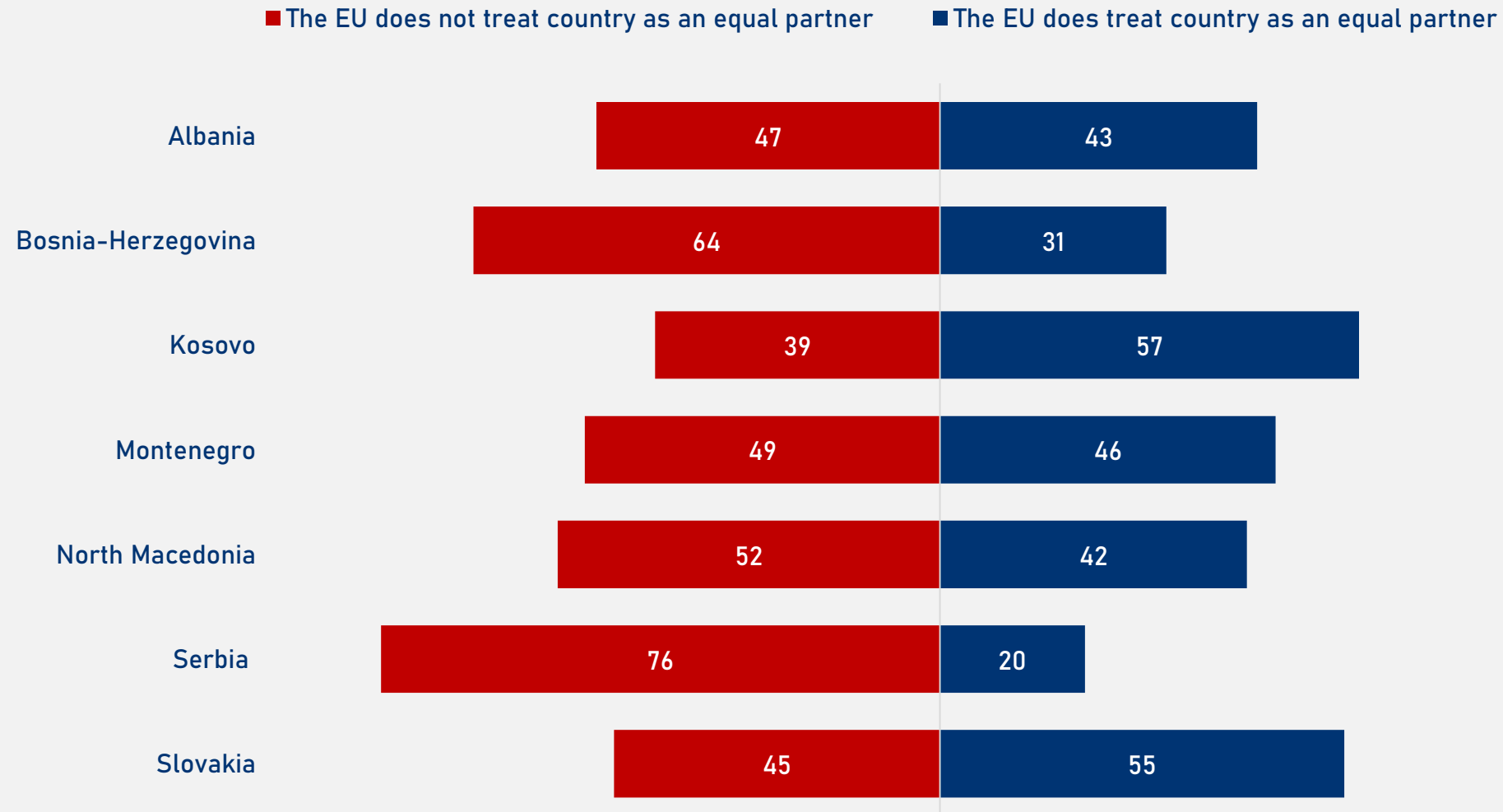
MAJORITIES IN SERBIA, KOSOVO, AND NORTH MACEDONIA CAN CONTEMPLATE A BETTER FUTURE WITHOUT EU MEMBERSHIP

Do you think that your country would be able to become a better place to live if it gave the EU integration up and turned towards other country(s) outside of the EU?



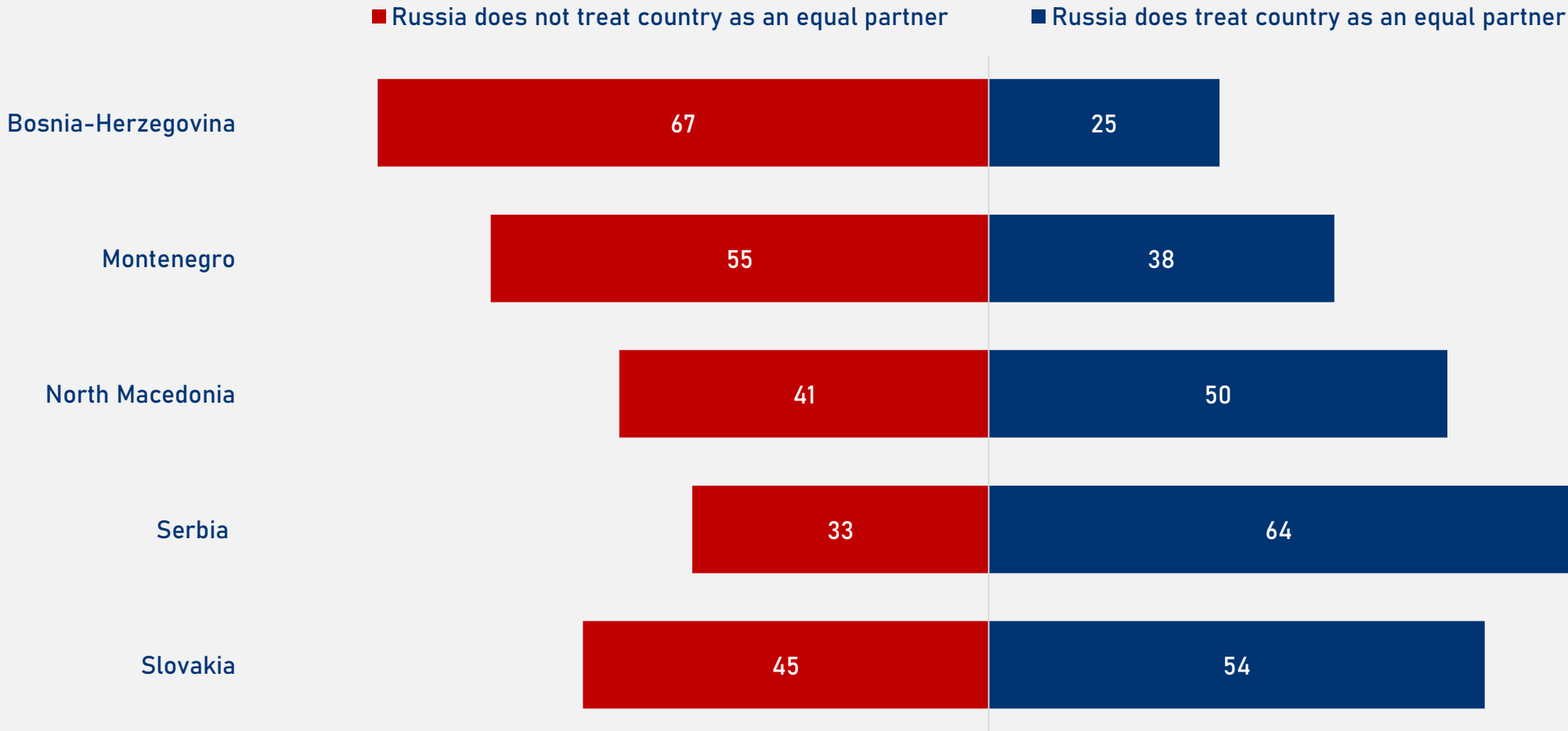
THE EU IS NOT PERCEIVED AS AN EQUAL PARTNER, EXCEPT IN KOSOVO AND SLOVAKIA

To what extent do you agree with the following statements?



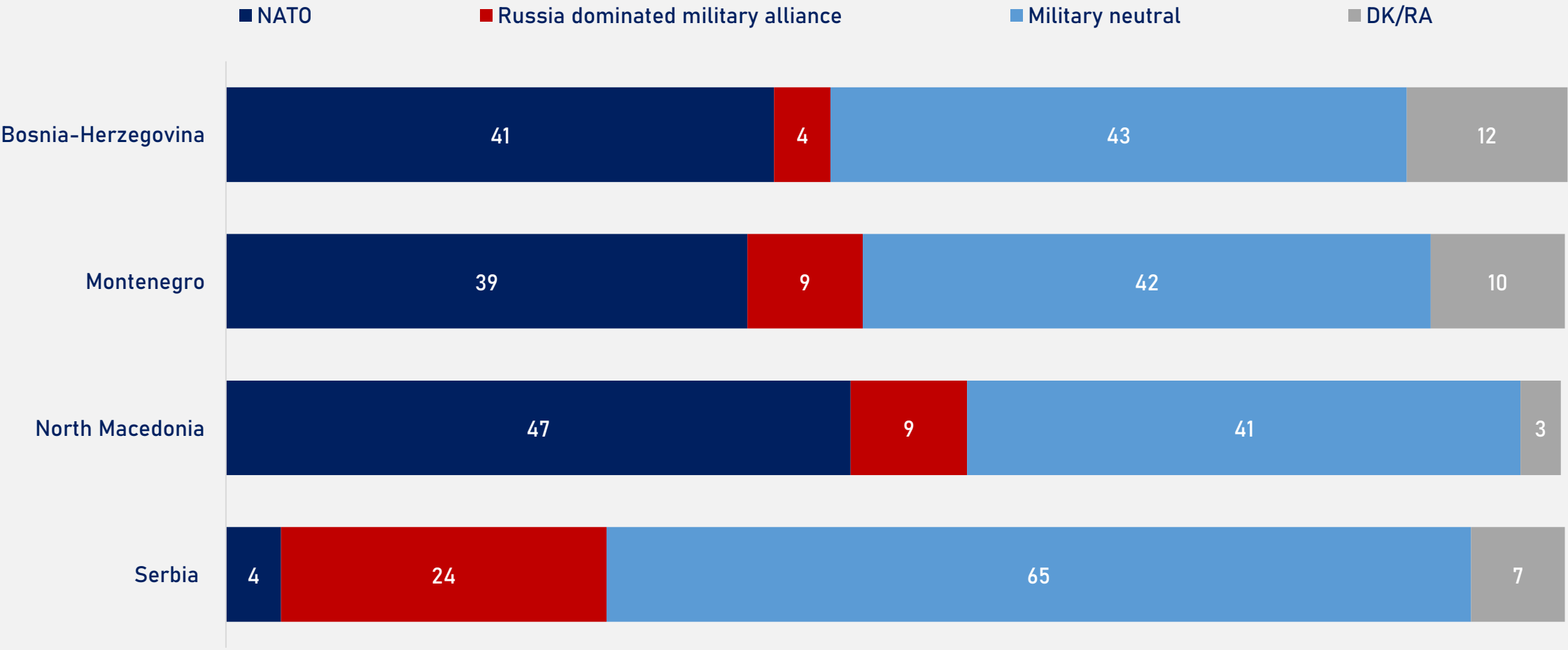
RUSSIA IS PERCEIVED AS AN EQUAL PARTNER, EXCEPT IN BOSNIA-HERZEGOVINA AND MONTENEGRO

To what extent do you agree with the following statements?



PUBLIC VIEWS ON NEUTRALITY VS. SECURITY ALLIANCES VARY BY COUNTRY

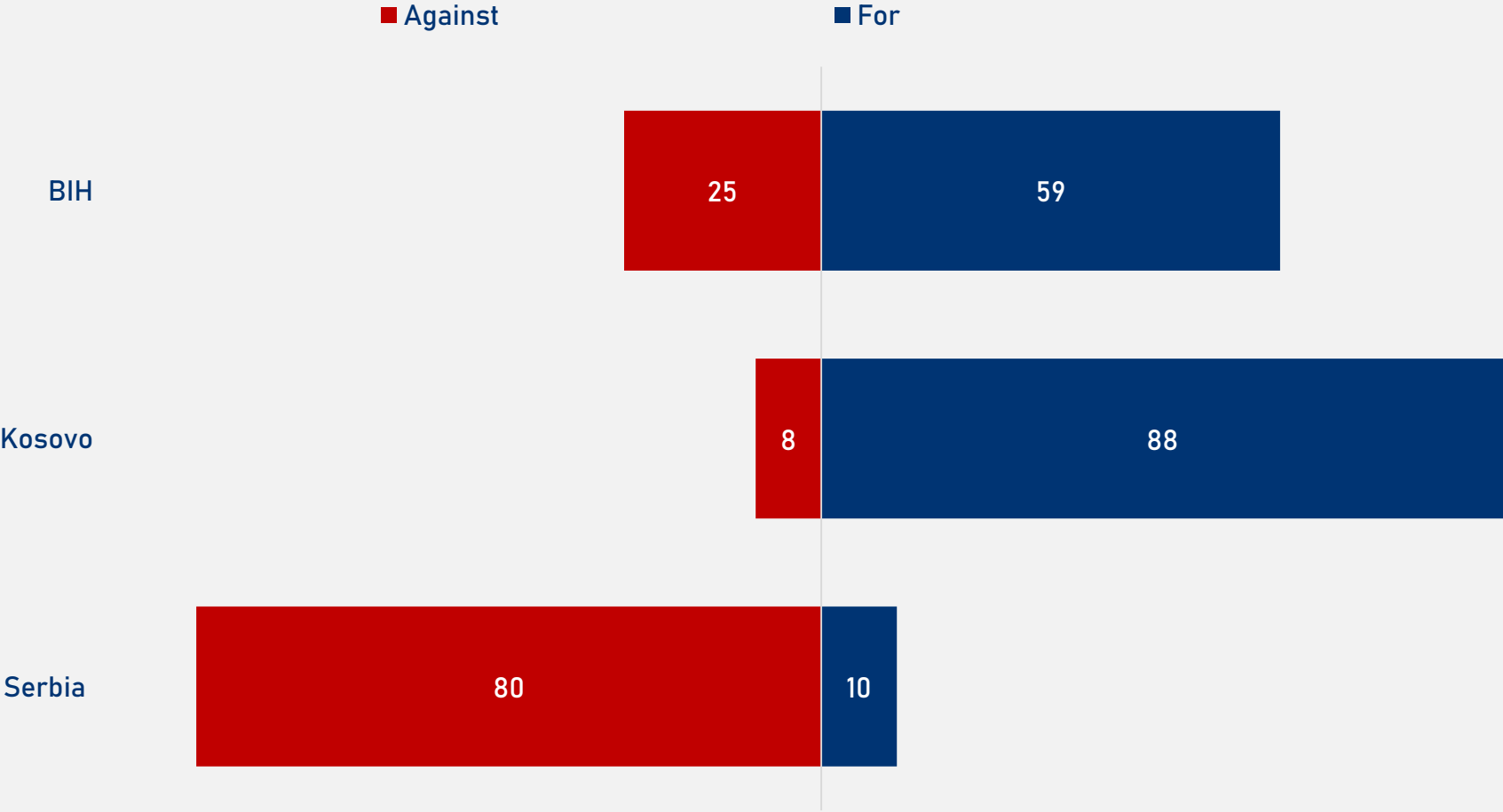
What do you see country being part of?



BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

NATO MEMBERSHIP GALVANIZES SUPPORT IN BOSNIA AND KOSOVO, BUT NOT SERBIA

If the referendum for NATO membership was held this Sunday, how would you vote?



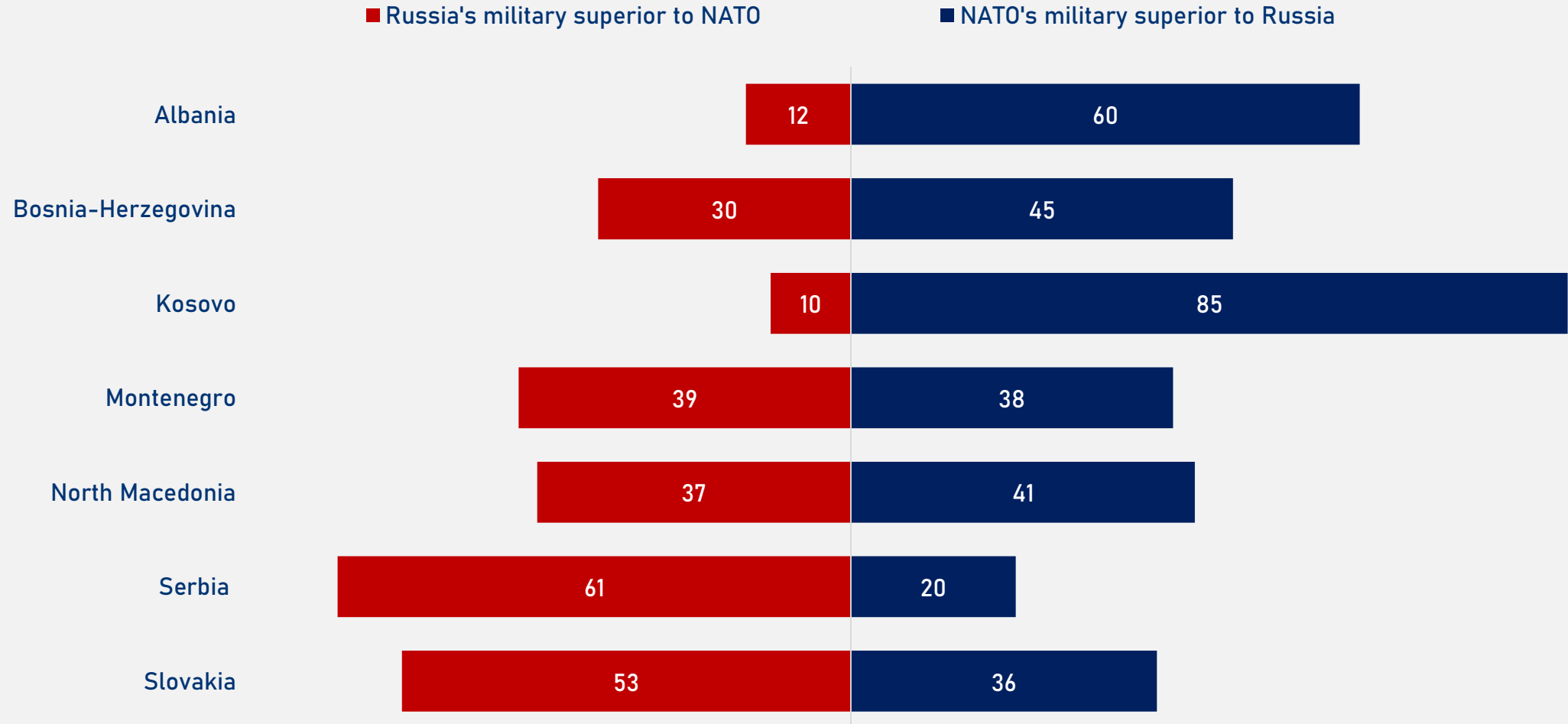
STRONG SUPPORT FOR NATO IN MEMBER COUNTRIES

Despite the fact that your country is already a member of NATO, if the referendum for NATO membership was held this Sunday, how would you vote?



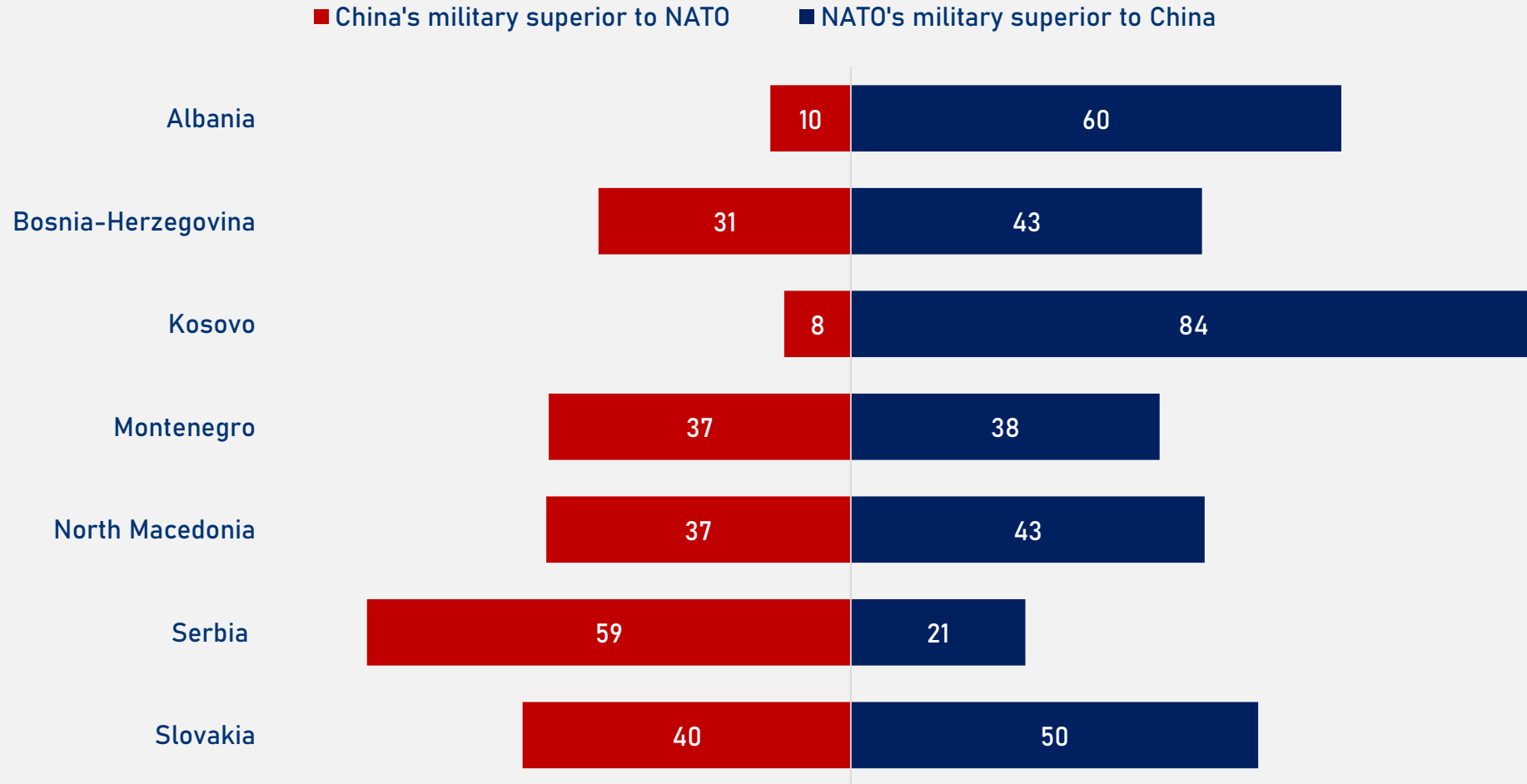
NATO IS PERCEIVED MILITARILY SUPERIOR TO RUSSIA, EXCEPT IN SERBIA, SLOVAKIA, AND MONTENEGRO

To what extent do you agree with the following statements?



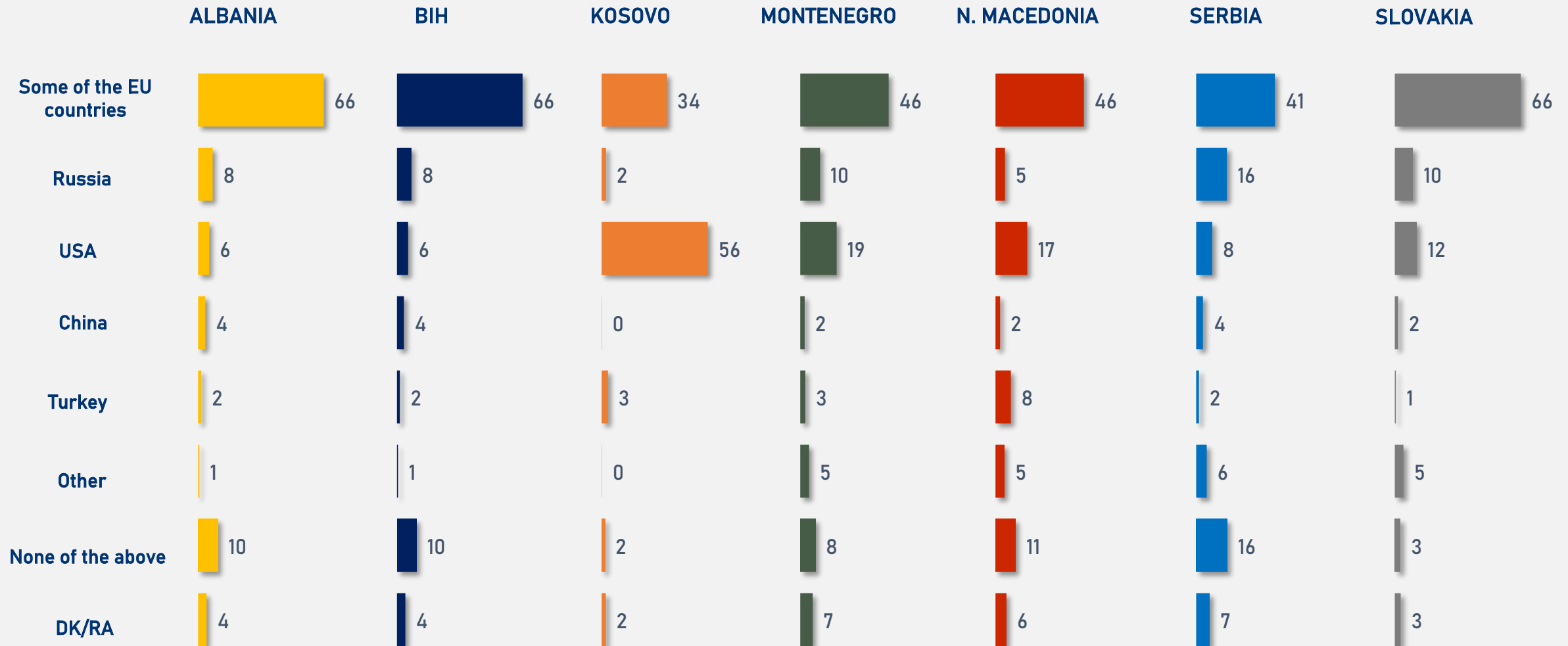
NATO IS PERCEIVED MILITARILY SUPERIOR TO CHINA, EXCEPT IN SERBIA AND MONTENEGRO

Which of these two statements is more similar to your opinion?



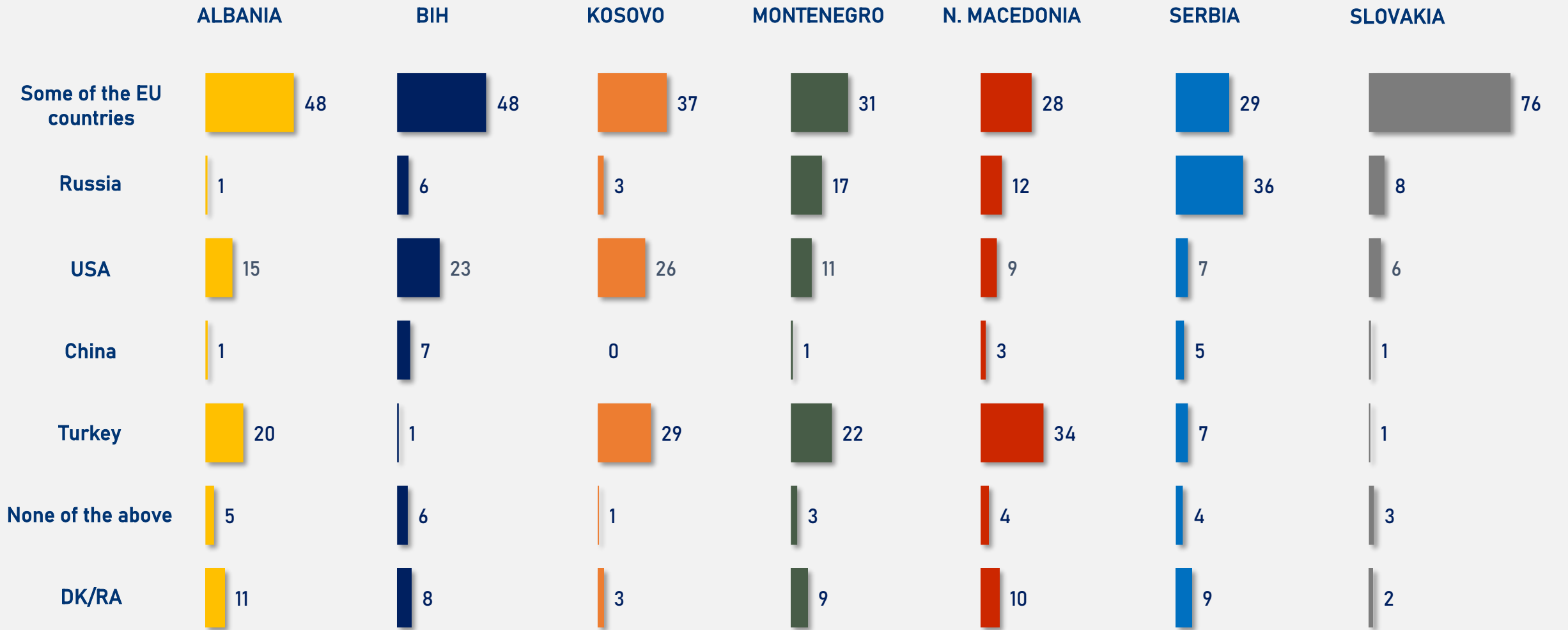
CITIZENS SEE THEIR CHILDREN'S FUTURE OPPORTUNITY TIED TO THE WEST

Speaking about the future, if your children had the opportunity to be educated, work or live abroad, to which of these would you prefer they go?



CITIZENS PREFER THE WEST FOR MEDICAL TREATMENT, EXCEPT FOR SERBIA AND NORTH MACEDONIA

Assuming you don't want to stay in your own country, if you or your family member needed a medical treatment or a surgery, which of these countries would you visit first?



BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

PUBLIC ATTITUDES ON DISINFORMATION

DISINFORMATION TAKEAWAYS

- Mainstream media are key information drivers.
- People rely on friends/family/colleagues ('microenvironments) to source, discuss, and confirm information on public affairs.
- The public says that it recognizes the presence of disinformation in media.
- Domestic media enjoys the public's trust, but people perceive disinformation from domestic sources that they do not trust.
- The public trusts information on social media, with predominant use of Facebook, Instagram, and YouTube as preferred platforms. People prefer to discuss politics and news in-person rather than online.

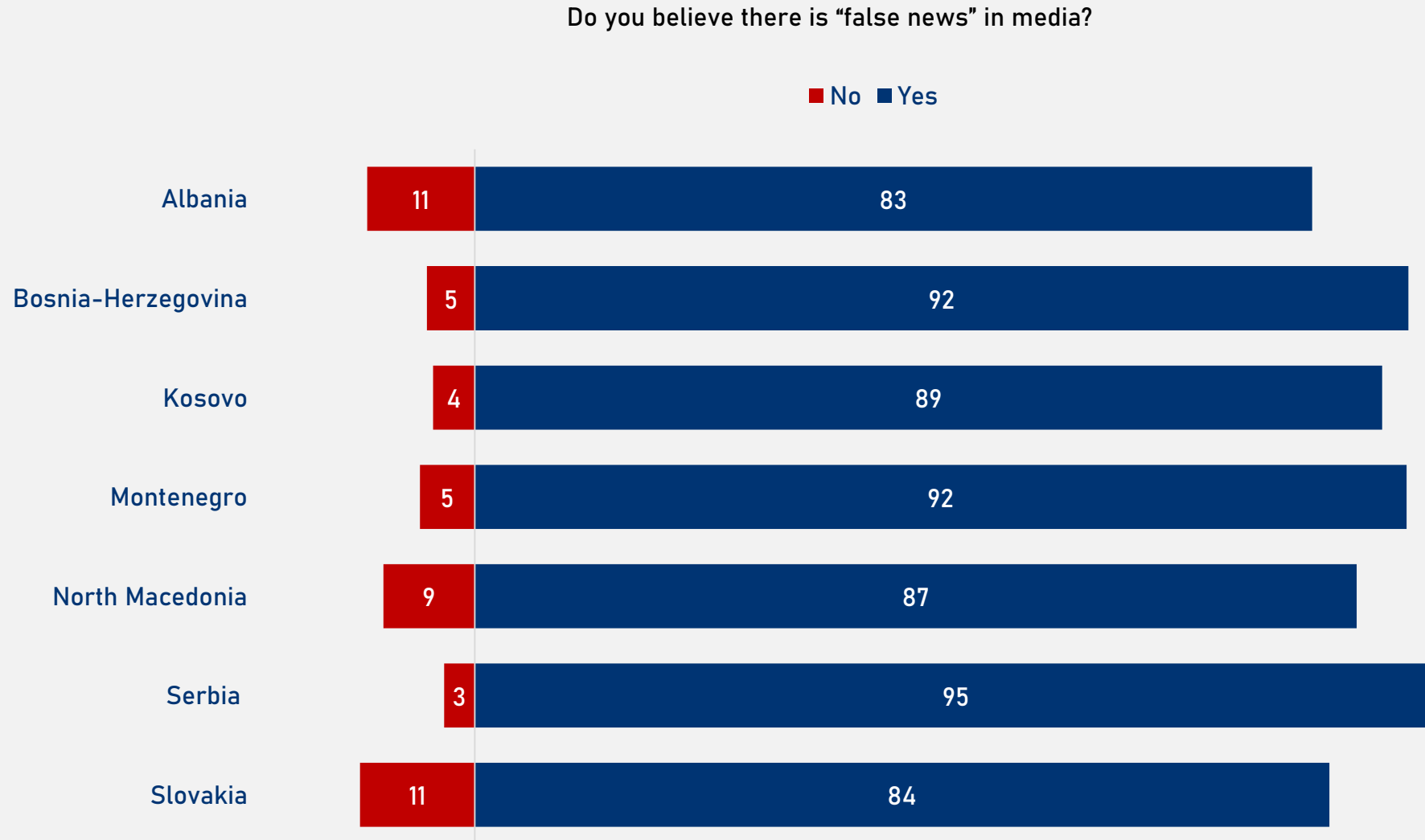
MAINSTREAM MEDIA IS DOMINANT SOURCE FOR NEWS, WITH PERSONAL ‘MICROENVIRONMENTS’ ALSO SIGNIFICANT IN OPINION FORMATION

How often do you get your news from the following sources?



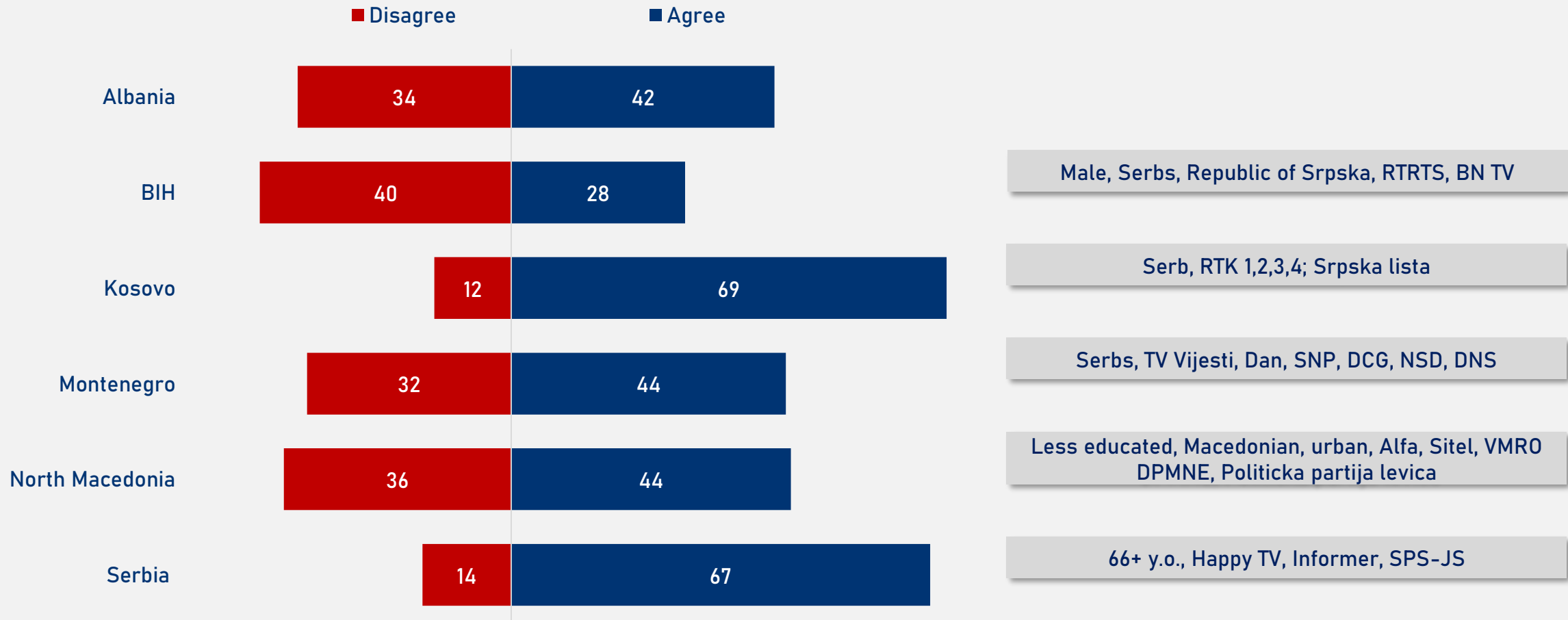
BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

STRONG MAJORITIES BELIEVE IN THE PRESENCE OF DISINFORMATION



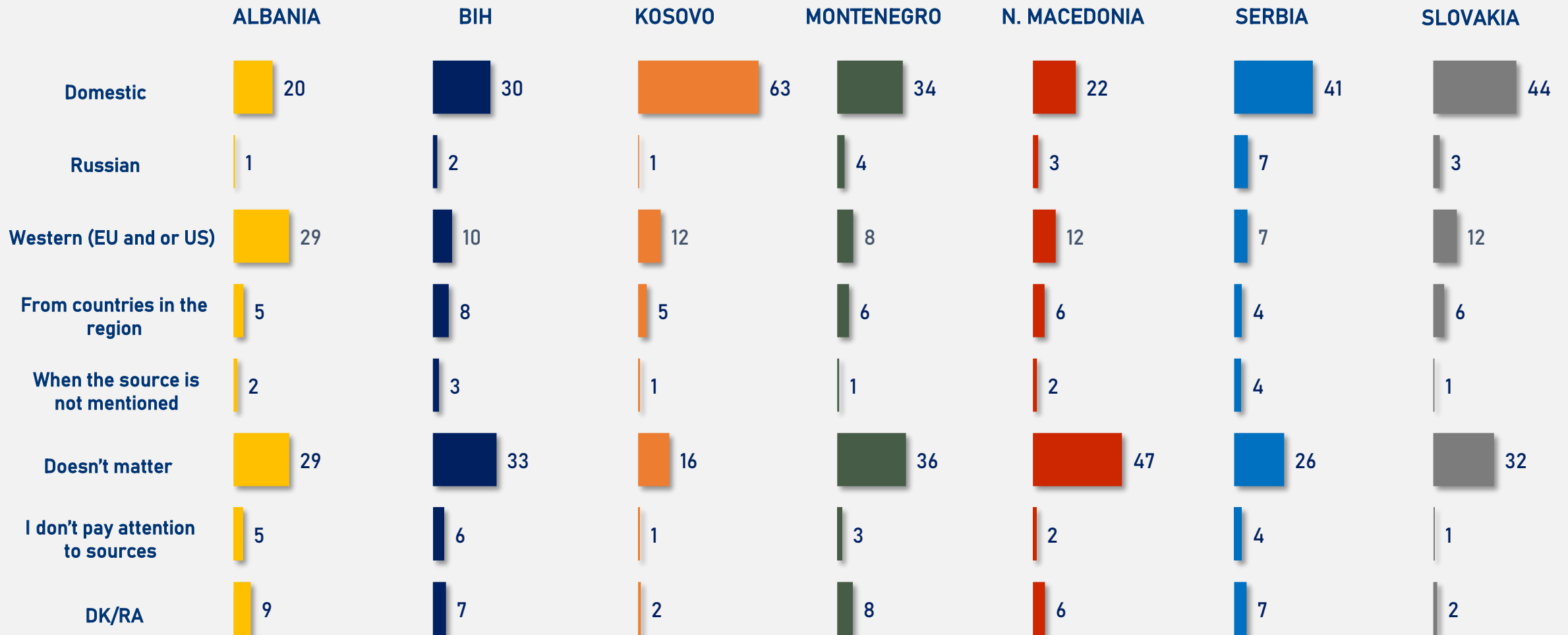
THE “GREATER ALBANIA” NARRATIVE HOLDS SWAY IN ALL COUNTRIES, EXCEPT FOR BOSNIA-HERZEGOVINA

To what extent do you believe Albanians living in different Western Balkan countries are trying to create a "Greater Albania?"



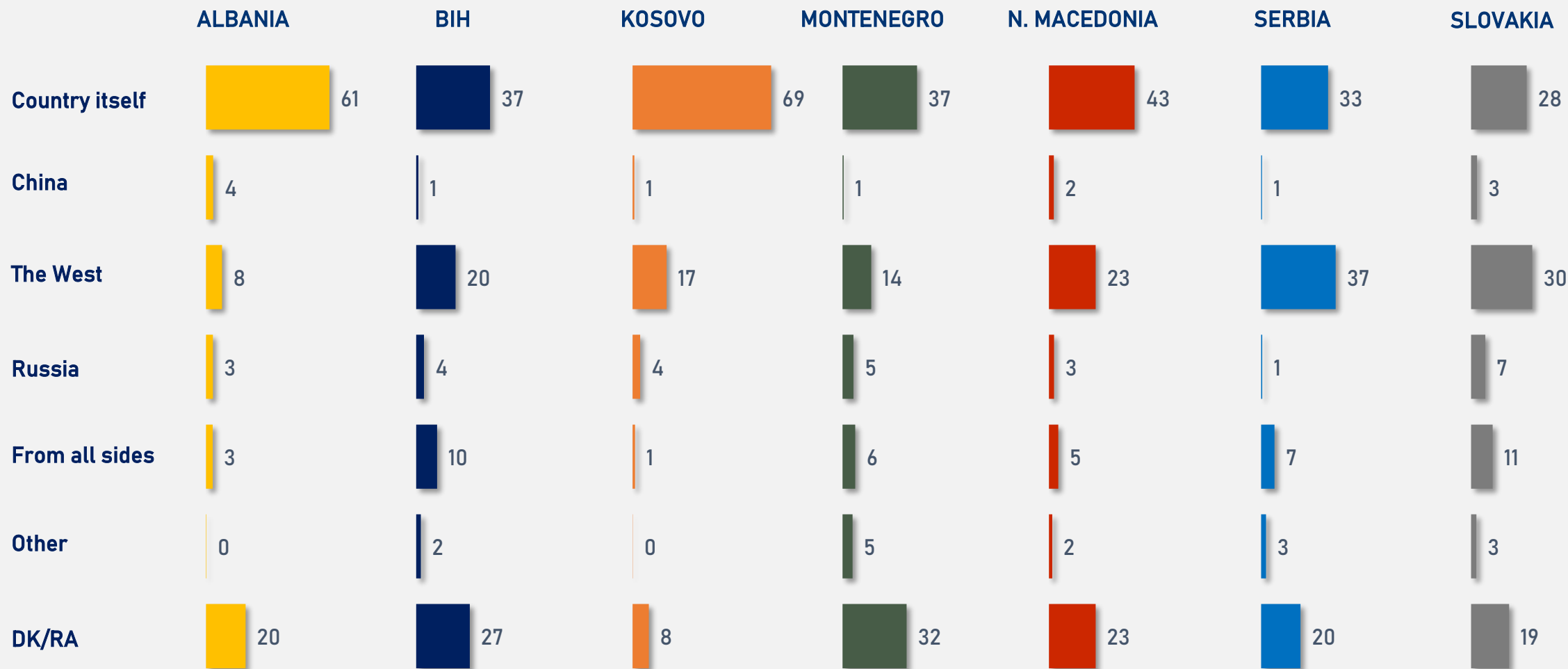
TRUST IN MEDIA SOURCES IS SPLIT

Do you believe in the news if the source is ...?



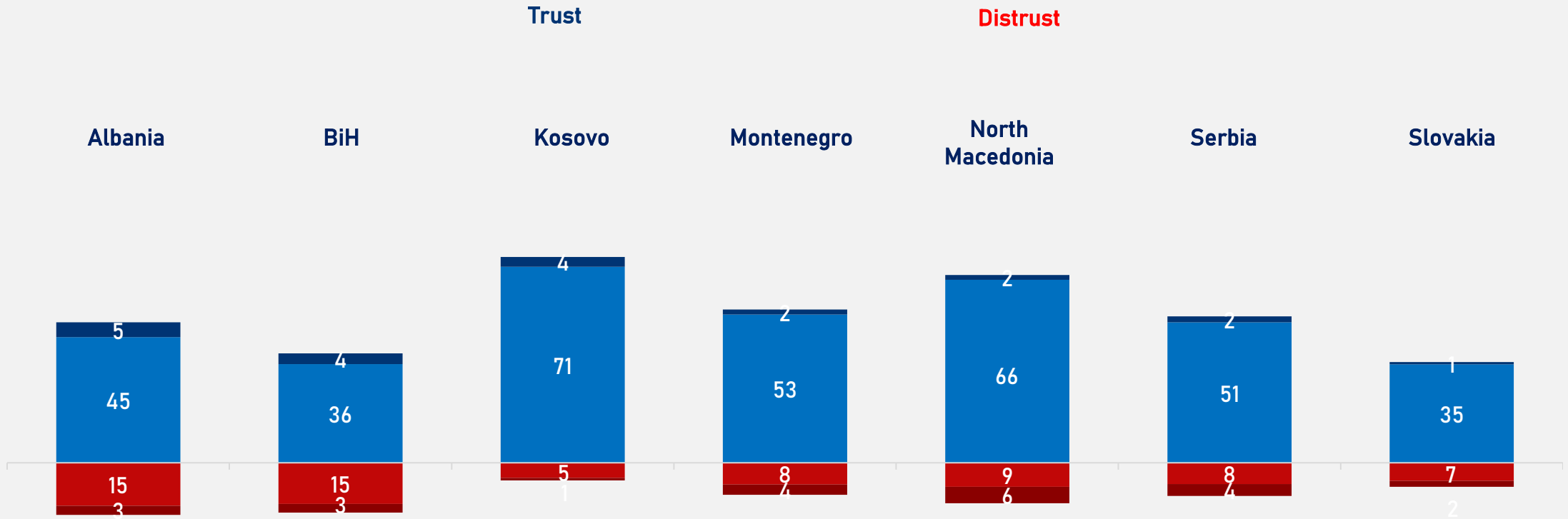
DISINFORMATION SEEN IN DOMESTIC NEW SOURCES OR FROM THE WEST

Do you believe “false news” come from...?



PEOPLE MOSTLY TRUST INFORMATION OBTAINED ON SOCIAL MEDIA

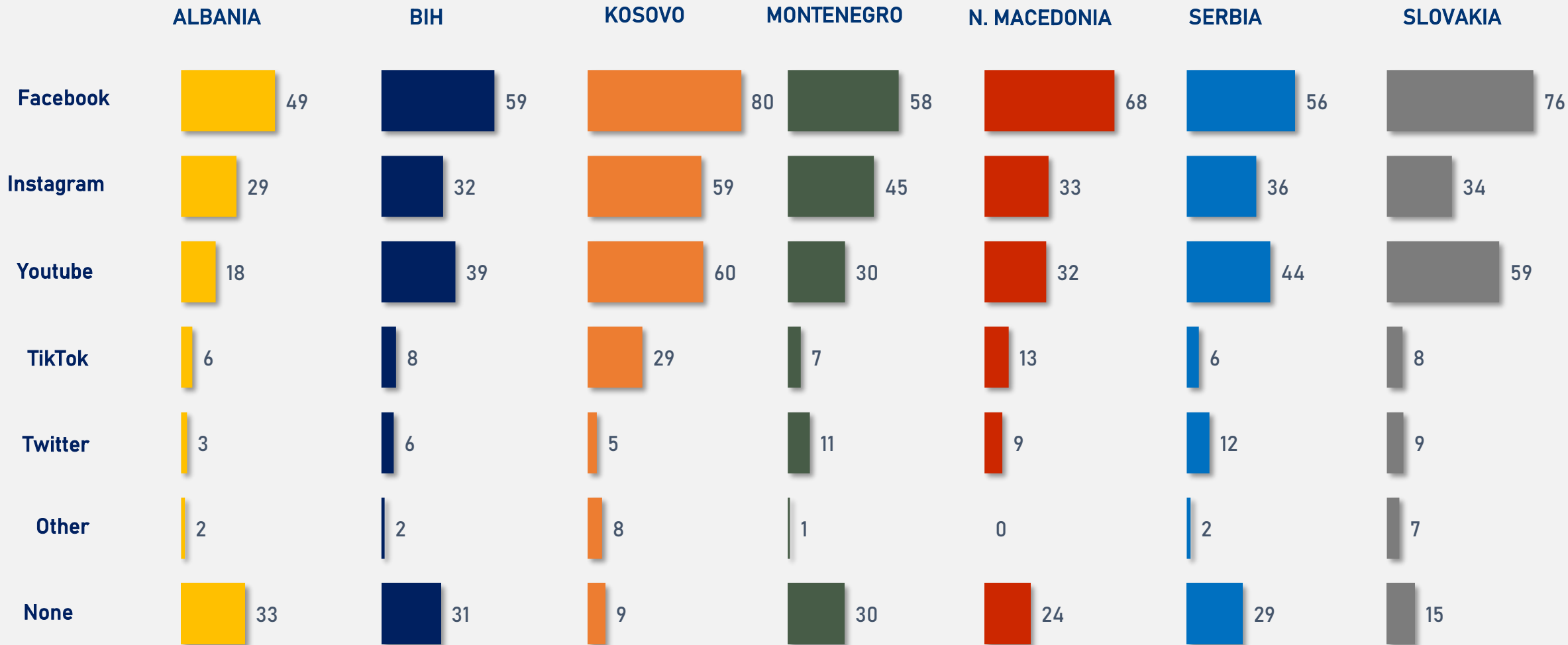
How much do you trust information you obtain in social media?



BASE: Those who normally use social networks to get the latest news updates; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages

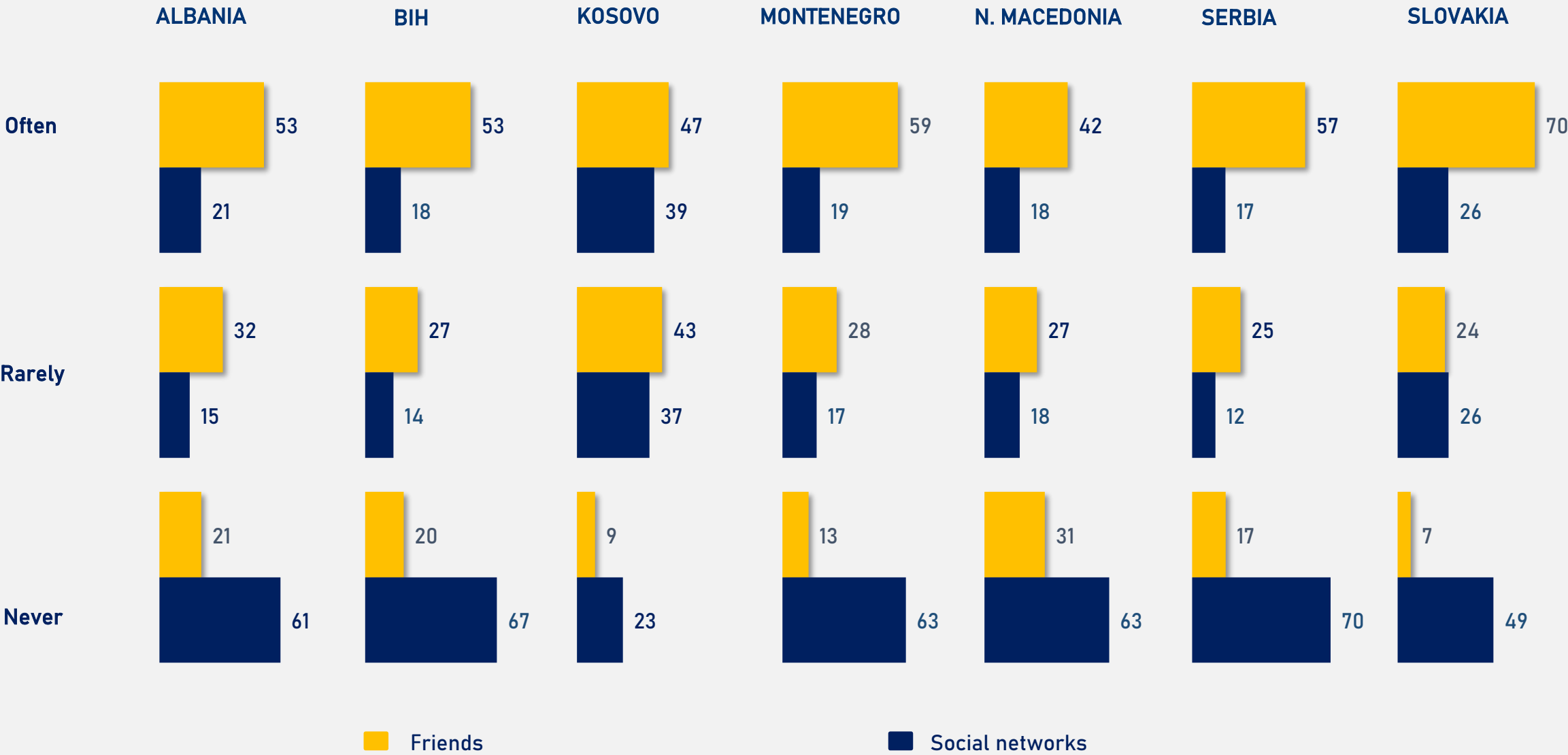
FACEBOOK, INSTAGRAM, AND YOUTUBE ARE THE MOST USED SOCIAL MEDIA PLATFORMS

Which social media you use? MULTIPLE ANSWERS



PEOPLE PREFER DISCUSSING POLITICS IN-PERSON THAN ON SOCIAL MEDIA

How often in the last 12 months did you discuss politics with your friends when you get together? How often in the last 12 months did you follow and/or join political discussions on social networks?



BASE: Total target population; SOURCE: NDI March 2021. NOTE: Numbers on the slide represent percentages