



Regional Cooperation Council



Ministry of Foreign Affairs  
and International Cooperation

# Western Balkans SecuriMeter 2024

**PUBLIC OPINION SURVEY ON  
“Attitudes towards security:  
Perceptions of security and threats  
in Western Balkans”**



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# INTRODUCTION

The Regional Cooperation Council (RCC), with the financial support of the Italian Ministry of Foreign Affairs and International Cooperation (MAECI), proudly presents the fourth edition of SecuriMeter, a public opinion survey dedicated to understanding security perceptions and key socio-economic issues in the Western Balkans. Since its inception in 2021, SecuriMeter has provided policymakers and practitioners with insights into the region's complex security landscape.

The 2024 edition of SecuriMeter builds on the foundation of its predecessors, incorporating a refined methodology and updated indicators to capture the evolving security and socio-economic concerns in Albania, Bosnia and Herzegovina, Kosovo\*<sup>1</sup>, Montenegro, North Macedonia, and Serbia. Conducted between June 14 and July 2, 2024, the survey reached 6,004 regional respondents, ensuring a robust and representative dataset. The 49 questions in the main questionnaire and an additional 19 demographic questions were originally written in English and subsequently translated into related local languages.

The public Opinion Survey was conducted among a minimum of N=1000 respondents aged 18+ in 6 (six) economies, with a total sample size of N=6004 respondents for the entire Western Balkans region.

This year's SecuriMeter focuses on traditional and emerging security challenges, reflecting the multifaceted nature of security in the 21st century. Topics covered include general and personal security perceptions, migration dynamics, emigration intentions, human security and resilience, corruption, trust in institutions, and the impact of global crises. For the first time, the survey also explores the socio-economic factors shaping security perceptions and points out the interconnectivity of these issues.

The findings reveal a region grappling with both uncertainty and reliability; SecuriMeter paints a comprehensive picture of the public's priorities, from concerns over potential conflicts to optimism about localized economic stability and fears.

This report aims to serve as a resource for decision-makers, researchers, and citizens, offering evidence-based guidance to shape policies that strengthen security and governance across the Western Balkans. SecuriMeter 2024 underlines the RCC's commitment to creating a safer, more stable region for all by promoting regional cooperation and transparency.

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



# REGIONAL OVERVIEW

## Macro view of a region in flux

Since the last SecuriMeter report was published in June 2023, the Western Balkans region continued on a downward path in almost all democracy indicators, displaying significant security concerns over the future peace and stability of the region. As noted by the 2024 Nations in Transit report, the region accounted for many of the most worrying developments, with four out of six experiencing decline and the rest maintaining more or less similar scores and rankings.

Amid the ongoing Russian invasion of Ukraine, the region continues to be exposed to potential internal and external security challenges. In Bosnia and Herzegovina, efforts to undermine the peace accords continued unabated in 2024 with a few notable examples including the passage of a separate electoral law in the entity of Republika Srpska, which was considered an attack on the structure of governance in Bosnia and Herzegovina.<sup>2</sup> Later, the adoption of the UN Resolution marking July 11 as the International Day of Reflection and Commemoration of the 1995 Srebrenica genocide caused uproar throughout Republika Srpska and an increase in separatist rhetoric.<sup>3</sup>

Tensions between Kosovo\*<sup>4</sup> and Serbia have steadily increased since the September 2023 attack in the Banjska monastery, north of Kosovo\*, which left one police officer and three attackers dead. Normalising relations between the two economies is of paramount importance for the region's stability and its collective move towards EU integration. However, the dialogue seems derailed as modest progress and hopes from the Ohrid agreement in early 2023 have reversed with parties abandoning the dialogue process and commitment to an agreement stands at an all time low.

While North Macedonia poses a lesser security risk for the region, it would be short-sighted to ignore its fragile interethnic relations. The consolidation of national identity has experienced internal and external setbacks. External factors, from the name dispute with Greece to the ongoing demand for constitutional changes from Bulgaria, have gravely impacted citizen morale and hope for an unhindered path towards EU integration.<sup>5</sup> The bleak perspective has been further fuelled by harmful domestic narratives, such as the emergence of political parties with an aggressive nationalist rhetoric, playing to citizens' discontent.

- 2 "In March 2024, Republika Srpska adopted a parallel entity election law; the law was reviewed by the BiH Constitutional Court which in July issued a temporary suspension of its implementation until a final decision is rendered". - ODIHR needs assessment mission report: "BiH, Local elections, 6 October 2024", August 2024, Warsaw. Online: <https://www.osce.org/files/f/documents/7/7/574436.pdf>
- 3 Security Council Report. April 2024. May 2024 Monthly Forecast: Bosnia and Herzegovina. Online: <https://www.securitycouncilreport.org/monthly-forecast/2024-05/bosnia-and-herzegovina-11.php>
- 4 \* This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence
- 5 Jordanovska, I. May 2024. "Identity Insecurity: North Macedonia's Challenging Relationship With Itself and Others." New Lines Institute. Online: <https://newlinesinstitute.org/wp-content/uploads/4-N-Macedonia.pdf>

Domestic and bilateral security challenges are further compounded by the increasing threat of foreign malign influence, towards which no economy in the region is immune, albeit at varying degrees of influence and potential for damage. While the region naturally and economically gravitate towards the European Union (EU), decades long efforts by other foreign entities, primarily China and Russia have increased their economic footprint and political clout. Russia's influence was partly ambiguous before its full scale manifested in the form of invasion of Ukraine, after which it has been perceived primarily as a malign entity that aims to spoil the European and NATO aspirations. Differently from Russia, China's presence in the region is primarily economic, exposing support to large infrastructure projects throughout the region<sup>6</sup>, many of which have been controversial and criticised for a variety of reasons.<sup>7</sup>

However, the region's future is decisively in the European Union as political elites proclaim EU integration the primary political goal of their governance.

In addition to the serious general security challenges, the region faces further pressures, some locally grown, some influenced by global developments that play an important role in its future prosperity, security and stability.

## A new paradigm for emigration in the Western Balkans

The Western Balkan economies have seen a steady outflow of people in the past three decades. In 2020, 21% of the region's population lived abroad with Albania and Bosnia and Herzegovina standing out at 44 and 49% respectively.<sup>8</sup> Important push factors have been better employment perspectives, working conditions and higher standards of living. The trend has been particularly relevant for young people, suffering from unemployment, poverty and social exclusion. Since 2012, the working-age population in the region decreased by 6%, and it is estimated to fall by 15% by 2050.<sup>9</sup> These have contributed to a depopulation trend that is catching up with the region's governments and requiring urgent attention and measures.

While public officials are slowly coming around to recognising the urgent problem of population decline, caused by a combination of both low birth rates and high levels of emigration, there are no clear strategies of addressing the issue.<sup>10</sup> Recent efforts such as increasing quotas for foreign workers, which have doubled in some places, are partly responding to the depopulation trend; however the new influx of migrants into the region poses grounds for other challenges, includ-

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6 Rechica, V., Beshku, K., Raos V., Vučković, V., Latal, S., Stankov, N., Balaj, Sh., Huskić, A., Slavková, M., Grabovac, A., Grabovac, T. August 2023. "Western Balkans at the Crossroads: Democratic Backsliding and External Actors' Influence." Prague Security Studies Institute.  
Online: [https://www.balkancrossroads.com/\\_files/ugd/1485a8\\_da5a08bf6abb46cab4531798af88ee4d.pdf](https://www.balkancrossroads.com/_files/ugd/1485a8_da5a08bf6abb46cab4531798af88ee4d.pdf)

7 Stojkovski, B., Jeremic, I., Kajosevic, S., Nikolic, I., Angelovski, I., Mejdini, F., and Pekmez, I. December 2021. "China in the Balkans: Controversy and Cost." BIRN.  
Online: <https://balkaninsight.com/2021/12/15/china-in-the-balkans-controversy-and-cost/>

8 United Nations. No date. International Migrant Stock 2020.  
Online: <https://www.un.org/development/desa/pd/content/international-migrant-stock>

9 Foundation for European Progressive Studies. March 2024. "Labour migration in the Western Balkans. Consequences for the region's democratic life."  
Online: <https://feps-europe.eu/wp-content/uploads/2024/04/The-Western-Balkans-labour-migration-1.pdf>

10 Jacques Delors Institute. July 2023. "Depopulation in the Western Balkans." Online:  
[https://institutdelors.eu/wp-content/uploads/2020/11/PB\\_230720\\_Demographie-Balkans\\_Marchais\\_EN.pdf](https://institutdelors.eu/wp-content/uploads/2020/11/PB_230720_Demographie-Balkans_Marchais_EN.pdf)

ing citizens' attitudes towards them. A large scale study from 2022 showed a positive correlation between large scale emigration and far right populism that includes anti-migrant sentiments at its epicentre.<sup>11</sup> As economies in the Western Balkans grapple with high levels of emigration and a new wave of immigrants from other countries, it is important to pay attention to citizens' attitudes towards newcomers. The survey results from the 2024 SecuriMeter show that people are mostly indifferent or do not see a positive or negative impact of migrants coming to their economies. However, it is worth noting that more people have a negative view of migrants compared to a more optimistic perspective. It is worth keeping an eye out for these trends and devising appropriate responses to address any grievances.

## Corruption: the region's perpetual Achilles' heel

The correlation between corruption and security is well documented, and the importance of combating the former to ensure the latter cannot be overstated. A recent report on the Fragile States Index clearly showed the association between corruption and the presence of security threats, whereby countries with a high CPI score faced fewer violent threats or potential for conflict.<sup>12</sup> Additionally studies have shown that high levels of perceived corruption are closely associated with low levels of resilience to crime due to the negative effects of corruption on institutions, and frameworks and mechanisms needed to combat it effectively.<sup>13</sup>

The 2023 Corruption Perception Index<sup>14</sup> did not show any significant progress across the region. Quite the contrary, scores continued to decline for most economies. Even Montenegro, listed as one of the top scorers in Eastern Europe and Central Asia, proved that deeply embedded corruption cannot be eradicated in a short period of time and by promises only. Systemic changes are necessary, albeit painful. North Macedonia's progress on reforms, especially on functioning of judiciary has been dismal, costing the ruling party a debilitating loss. Recent amendments made to the criminal code which aided corrupt individuals from the previous government to avoid conviction further undermined already low levels of trust in the government and the independence of judiciary. Bosnia and Herzegovina and Serbia continued to decline in the CPI due to a variety of factors, including weak laws, oversight institutions and reporting channels which added to the existing power concentration in Serbia and a dysfunctional political system in Bosnia and Herzegovina.

Citizens' perceptions are confirmed by assessments of the regions' lackluster progress in fighting corruption. Recent assessments conducted between 2022 and 2023 by Transparency International revealed a "complex mixture of slow and limited progress in strengthening integrity systems, along

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11 Dancygier, R., Dehdari, S. H., Laitin, D. D., Marbach, M., and Vernby, K. September 2022. "Emigration and Radical Right Populism" (Working Paper). Immigration Policy Lab.

Online: [https://projects.iq.harvard.edu/files/pegroup/files/dancygier\\_et\\_al\\_emigration\\_and\\_populism.pdf](https://projects.iq.harvard.edu/files/pegroup/files/dancygier_et_al_emigration_and_populism.pdf)

12 The Fund for Peace. 2022. Fragile States Index, Annual Report 2022. Online: <https://fragilestatesindex.org/wp-content/uploads/2022/07/22-FSI-Report-Final.pdf>

13 Global Organized Crime Index. No date. Continental overviews and results. Online: <https://ocindex.net/report/2023/04-continental-overview.html#europe>

14 Transparency International. 30 January 2024. CPI 2023 for Eastern Europe & Central Asia: Autocracy & weak justice systems enabling widespread corruption. Online: <https://www.transparency.org/en/news/cpi-2023-eastern-europe-central-asia-autocracy-weak-justice-systems-widespread-enabling-corruption>

with democratic backsliding that strongly augments corruption levels".<sup>15</sup> Citizens surveyed for the 2024 SecuriMeter very much reflect the dismal progress in anti-corruption efforts with over 80% of respondents considering corruption fairly or very widespread. Further, over 50% believe the phenomenon increased in the past three years, very much in line with the assessments made in various studies and reports.

## **Economic insecurity: Between post-pandemic recovery and new shocks**

Economies in the Western Balkans have faced shock after shock in the past four years. The COVID-19 pandemic put unprecedented strain on the economies as governments were grappling with the health and economic response to the crisis, with the entire region's economy contracting by 3.4%.<sup>16</sup> The pandemic affected every aspect of the societies in the region. Economically it hurt tourism, investments, employment and fiscal policy. The region recovered better than initially expected in 2022, experiencing strong growth and reduction in unemployment, before being hit by another shock as Russia's full scale invasion of Ukraine brought a new storm. As a result, growth in the Western Balkans further revised downwards for 2023 (by 0.3 percentage points) to 2.8 percent.<sup>17</sup> Inflation surged to a two-decade high in 2022 in almost all economies, and price pressures remained elevated in early 2023. Higher energy and food prices, unfavourable weather conditions, tightening financial conditions, and considerable uncertainty significantly tested the region's economic resilience throughout 2023.<sup>18</sup> However, at varying degrees economies in the region have shown a tendency to withstand the recent shocks.

There is cause for cautious optimism that the region has weathered the shocks and is heading towards growth. As the most recent World Bank regular economic report notes "growth projections for the medium term have increased slightly". Regional GDP growth for the WB is expected to increase to 3.2 percent in 2024 and further to 3.5 and 3.8 percent in 2025 and 2026, respectively. However, putting aside optimism, the region's growth would be insufficient to ensure meaningful convergence with EU income levels.<sup>19</sup> The new EU Growth Plan for the Western Balkans adopted in late 2023 recognises the importance of economic convergence to bring the region closer to the EU. The new approach focuses on bringing forward some of the benefits of EU integration, especially those that could directly impact citizens' livelihoods. In return for these benefits the governments in the region should undertake key reforms and investments to accelerate the speed

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15 Transparency International. 2024. Between Anti-corruption Reform and Decline: Examining key actors, strengths and weaknesses in the Western Balkans and Türkiye's national integrity systems. Online: [https://images.transparencycdn.org/images/2024\\_NISReport\\_BetweenAnti-CorruptionReformAndDecline\\_English.pdf](https://images.transparencycdn.org/images/2024_NISReport_BetweenAnti-CorruptionReformAndDecline_English.pdf)

16 World Bank Group. 2021. Western Balkans Regular Economic Report No.19, Subdued Recovery. Online: <https://openknowledge.worldbank.org/server/api/core/bitstreams/fe49f21-9a11-5d1b-9d70-5adea226e601/content>

17 World Bank Group. 2022. Western Balkans Regular Economic Report No.22, Beyond the Crises. Online: <https://openknowledge.worldbank.org/server/api/core/bitstreams/8fbb19e3-e2b9-5522-9c19-e001ac29465f/content>

18 World Bank Group. 2023. Western Balkans Regular Economic Report No.23, Testing Resilience. Online: <https://openknowledge.worldbank.org/server/api/core/bitstreams/fde84e0e-1b8f-4889-a971-06ff64d1f1c6/content>

19 World Bank Group. 2024. Western Balkans Regular Economic Report No.25, Invigorating Growth. Online: <https://documents1.worldbank.org/curated/en/099040524061582128/pdf/P5006481fb98fb0db1a9401e200293e761d.pdf>

of enlargement process and growth of economies.<sup>20</sup> Citizens from the region fully understand the importance of economic growth in the betterment of their lives. In fact, subsequent SecuriMeter surveys show economic issues rank amongst the top concerns for people across the economies of the region.

## What to do about (lack of) trust in institutions?

Together with corruption, lack of trust in institutions is one of the most common themes and findings of different reports, surveys and research. Citizens from the region display deep distrust in their institutions, believing they do not represent their interests. These perceptions are confirmed in several assessments by public, political and independent institutions throughout the region that display a significant number of weaknesses despite efforts to reform as part of EU accession processes. The National Integrity System report by Transparency International points to a number of key weaknesses that hamper democratic progress throughout the region, including weak separation of powers between the executive and judiciary, political interference in public sector appointments, insufficient initiatives to legislate and implement key integrity measures.<sup>21</sup>

Faced with these challenges citizens across the region tend to place their trust in international institutions, such as the EU and NATO, which SecuriMeter clearly shows. The least trusted institutions are usually political parties and parliaments, as the findings of SecuriMeter and various other surveys show. For instance, a 2024 survey by the International Republican Institute (IRI) showed that least trusted institutions across all economies of the region are courts, political parties, parliaments and to an extent prime ministers. Despite both external entities playing a critical role in the region in terms of pushing for reforms and steering the region towards more consolidated democracies, decisions are made and implemented by internal leaders and the consequences, whether positive or negative, are primarily felt by domestic audiences. Therefore, more work needs to be done to gain back the trust in institutions and governance so that citizens believe and feel that their government is working for their benefit and not for the benefit of clientelism networks and personal enrichment of decision-makers.

## AI and new technologies: The good, the bad and the ugly

Artificial intelligence (AI), generative AI and new emerging technologies have taken the world by storm in recent years, with rapid changes and developments rarely seen before. As with everything new, there is excitement, fear and scepticism by experts and non-experts alike. The excitement comes from the potential of generative AI to do good and transform especially health care and education. In a recent survey of AI experts, the Pew Research Center in the US showed that experts foresee a world in which "wonder drugs are conceived and enabled in digital spaces; where per-

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20 European Commission. 2023. Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions: New growth plan for the Western Balkans. Online: [https://neighbourhood-enlargement.ec.europa.eu/document/download/8f5dbe63-e951-4180-9c32-298cae022d03\\_en?filename=COM\\_2023\\_691\\_New%20Growth%20Plan%20Western%20Balkans.pdf](https://neighbourhood-enlargement.ec.europa.eu/document/download/8f5dbe63-e951-4180-9c32-298cae022d03_en?filename=COM_2023_691_New%20Growth%20Plan%20Western%20Balkans.pdf)

21 Transparency International. 2024. Between Anti-corruption Reform and Decline: Examining key actors, strengths and weaknesses in the Western Balkans and Türkiye's national integrity systems. Online: [https://images.transparencycdn.org/images/2024\\_NISReport\\_BetweenAnti-CorruptionReformAndDecline\\_English.pdf](https://images.transparencycdn.org/images/2024_NISReport_BetweenAnti-CorruptionReformAndDecline_English.pdf)

sonalised medical care gives patients precisely what they need when they need it; where people wear smart eyewear and earbuds that keep them connected to the people, things and information around them; where AI systems can nudge discourse into productive and fact-based conversation; and where progress will be made in environmental sustainability, climate action and pollution prevention."<sup>22</sup> However, such positive impacts are often overshadowed by fears of the bad that comes with AI. Recent studies have shown that AI-based applications come with risk of "misuse, overuse, and explicit abuse"<sup>23</sup>. A negative impact of AI already visible has been the proliferation of disinformation and misinformation, which has put an incredible burden on the integrity of information space, which significantly influences peoples' public opinion and stances and their interpersonal and institutional trust, posing a threat to the health of democracies worldwide.

Recent polls on peoples' perspectives and perceptions show a degree of understanding of AI's potential for good but destructive potential as well. A recent survey at EU level showed people are particularly concerned about the use of AI by national governments in the area of national security and a strong preference for regulations in this area.<sup>24</sup> The data was further corroborated in a 2023 survey on European Tech Insights, which showed growing scepticism on the use of AI and need for strong regulations at EU level.<sup>25</sup> In the United States a 2022 survey showed that one in three respondents were more concerned than excited about the emergence of AI, with a further 45% equally concerned and excited about the new technologies being used.<sup>26</sup> In 2023 the same survey showed a significant increase in those who are more concerned, jumping from 38% to 52%<sup>27</sup>, a significant increase considering the surveys were administered one year apart.

While SecuriMeter did not venture into the specific topic of AI regulation and management, it should be included in future research and surveys throughout the region, especially in light of the past cyberattacks experienced throughout the economies of the region. However, the finding of the SecuriMeter that AI will cause mostly harm in the next 20 years could be linked to the same type of concerns expressed by citizens in the EU, albeit giving a more pessimistic view of the negative impacts compared to positive ones. Future surveys will delve more into the reasons for this scepticism and what governments should do. However, considering low levels of trust in institutions throughout the region, especially the executive, regulation may be seen as problematic.

22 Anderson, J. and Rainie, L. June 21, 2023. "As AI Spreads, Experts Predict the Best and Worst Changes in Digital Life by 2035." Pew Research Center. Online: <https://www.pewresearch.org/internet/2023/06/21/as-ai-spreads-experts-predict-the-best-and-worst-changes-in-digital-life-by-2035/>

23 Littman, M. L., Ajunwa, I., Berger, G., Boutilier, C., Currie, M., Doshi-Velez, F., Hadfield, G., Horowitz, M. C., Isbell, C., Kitano, H., Levy, K., Lyons, T., Mitchell, M., Shah, J., Sloman, S., Vallor, S., and Walsh, T. September 2021. "Gathering Strength, Gathering Storms: The One Hundred Year Study on Artificial Intelligence (AI100) 2021 Study Panel Report." Stanford University. Online: <https://ai100.stanford.edu/gathering-strength-gathering-storms-one-hundred-year-study-artificial-intelligence-ai100-2021-1-0>

24 European Center for Not-for-Profit Law. 14 November 2022. New Poll: Public fears over government use of Artificial Intelligence. Online: <https://ecnl.org/news/new-poll-public-fears-over-government-use-artificial-intelligence>

25 IE University. 2023. European Tech Insights: Mapping European Attitudes towards Technological Change and its Governance. Online: <https://www.ie.edu/cgc/research/european-tech-insights/?submissionGuid=13f5fbd4-401a-4db9-afd4-1fc751077f26#download-cgc>

26 Rainie, L., Funk, C., Anderson, M., and Tyson, A. March 17, 2022. "How Americans think about artificial intelligence." Pew Research Center. Online: <https://www.pewresearch.org/internet/2022/03/17/how-americans-think-about-artificial-intelligence/>

27 Faverio, M. and Tyson, A. November 21, 2023. "What the data says about Americans' views of artificial intelligence." Pew Research Center. Online: <https://www.pewresearch.org/short-reads/2023/11/21/what-the-data-says-about-americans-views-of-artificial-intelligence/>

Those surveyed in EU member states also expressed more trust in EU regulations rather than the ability of their own governments to regulate AI efficiently.

## Gender-based violence runs rampant

Gender-based violence is prevalent and continues to increase throughout the region. While cases of gender-based violence, especially its worst form, femicide, are well documented, economies lack systematic data collection tools to shed light on the phenomenon and its root causes. However, anecdotal data from civil society organisations at the forefront of combating GBV and other studies show a persistent lack of efficient mechanisms to prevent, provide services to survivors and prosecute perpetrators. Reporting rates and trust in institutions continues to be low amongst survivors, as they feel alone, misunderstood and fear repercussions from perpetrators amid lack of robust protection mechanisms. Even though all economies in the region have ratified the Istanbul Convention, its implementation is lagging behind.<sup>28</sup> On average, a woman is killed in the region every week, with the number of femicides rising in recent years to the hundreds.<sup>29</sup> Global reports and surveys show at least one in three women have experienced violence at some point in their lives, with a similar trend in the region. However, unreported cases and fear of admitting or even recognising when violence happens could put this number at a much higher scale, making the phenomenon a health, economic, and security emergency worldwide.

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28 Kvinna Till Kvinna. November 2023. Women's Rights in Western Balkans: Women in politics, gender-based violence and security for women human rights defenders in Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia and Serbia 2023. Online: <https://kvinnatillkvinna.org/wp-content/uploads/2023/11/The-Kvinna-till-Kvinna-Foundation-Womens-Rights-in-Western-Balkans-2023.pdf>

29 Chen, A. and Domi, T. 2024. "Euroviews. Women are being murdered in the Western Balkans, and it is time to take action." Euronews.com. Online: <https://www.euronews.com/my-europe/2024/05/03/women-are-being-murdered-in-the-western-balkans-and-it-is-time-to-take-action#:~:text=From%202020%20to%202023%2C%20139,femicides%20is%20likely%20much%20higher.>

# KEY FINDINGS

## Cautious optimism over satisfaction with the state of the economies

2024 SecuriMeter shows a slight decrease in feelings of dissatisfaction with the situation of various economies in the region, as the numbers of those dissatisfied decreased by 13% compared to 2023. While the level of dissatisfaction remained unchanged for Kosovo\* and Albania, a significant drop in dissatisfaction was recorded in Bosnia and Herzegovina (from 56% to 41%), Montenegro (from 40% to 27%) and Serbia (from 48% to 29%). As discussed in the regional overview, while most economies declined in democracy scores in different indices, the region has seen an economic rebound, performing slightly better than economic forecasts. The easing of economic pressures that burdened the region especially in 2022 and continued to slowly improve in 2023 may help explain this shift in some of the economies. A renewed EU accession momentum throughout 2024 may further explain the 13% decrease in those who are dissatisfied as it stands at the frontline and there are already talks and promises of EU accession by 2028. Previous research on peoples' attitudes and perspectives and connection between economic conditions and the state of democracy show that there is a positive correlation. When people believe the economy is doing well, they generally associate it with democracy performing well also. This may explain why there is less tendency to view the situation in the economies of the region as bleak. Despite the positive trend, the relatively small decrease underscores the need for continued efforts to address economic concerns and to ensure that these improvements are sustained and expanded upon.

## Perceptions of security stronger for the specific economies, more worrying for the region as a whole and the future

In the Western Balkans, 39% of citizens believe the region is a safe place to live, although only a small fraction (3-8%) completely agree with this sentiment. Perceptions of security differ significantly across economies, with Montenegro having the highest proportion of citizens (42%) who feel secure, while Albania (40%), Bosnia and Herzegovina, and Serbia show greater levels of insecurity. These concerns about regional security are likely shaped by ongoing issues, including tensions between Serbia and Kosovo\*, ethnic antagonisms in Bosnia and Herzegovina, and fears of external influences, particularly from Russia. By contrast, respondents feel more secure about their own economies (52%) than they do about the region as a whole (39%). Montenegro and Kosovo\* have the highest levels of perceived economic security, with 57% and 54% of their citizens feeling secure, respectively, while Albania has the highest proportion of citizens who feel insecure about their economy (32%). These variations in security perceptions between individual economies and the broader region may be influenced by how different economies and the region in its entirety are presented in the media as one of the only sources of information on broader developments compared to their own economies where respondents may feel better equipped to judge the level



of security. Media has a preponderance to emphasize negative developments over positive ones, and this could also explain the negative bias towards the region as a whole.

The future security outlook in the Western Balkans appears bleak, with only 31% of respondents believing the region will be more secure in the next 12 months. Albania (36%) and Bosnia and Herzegovina (34%) exhibit particularly negative expectations, reflecting a broader trend of declining optimism. Concerns about potential conflicts are widespread, with 48% of citizens fearing a war between Western Balkan economies, including significant worries about terrorist attacks (41%) and civil wars (40%). These anxieties are most pronounced in Serbia (58%), Bosnia and Herzegovina (51%), and Montenegro (49%). Security perceptions in the region are significantly affected by both internal and external factors, such as the war in Ukraine, ethnic disputes, and political instability, particularly between Serbia and Kosovo\* and within Bosnia and Herzegovina.

## **Economic woes high on peoples' list of worries**

When Bill Clinton's political advisor coined the term "it's the economy, stupid" in 1992, it aimed to show that voters will reward or punish political candidates based on their perceptions of the economy. While recent studies have shown that this universal truth may no longer hold<sup>30</sup> as it ignores other factors, ideological leanings and recent polarisation along political lines, the economy still holds a strong grasp on peoples' perceptions and worries. The 2024 SecuriMeter results show that the main economic concerns for residents of the Western Balkans are the high costs of living and inflation, identified as the top issue by 77% of respondents across all demographics. Wages are the second major concern, cited by 55%, with significant variation across economies; this concern persists despite recent wage increases due to rising living costs. Older respondents (65+) are particularly worried about the pension system, with 61% viewing it as the most pressing economic problem. Socioeconomic disparities are also evident, with 36% of respondents highlighting the wealth gap and unemployment as key issues, and notable gender differences in concerns over unemployment and fuel prices. Other issues, such as poverty (49%) and corruption (48%), are major concerns, especially amongst the less educated and older individuals. High levels of concern about depopulation and emigration are found in Albania (64%), Kosovo\* (53%), and North Macedonia (49%), while concerns about organised crime, terrorism, and foreign influence are more pronounced amongst more educated residents and those in Bosnia and Herzegovina, Montenegro, and Serbia. The region is split on the balance between security and freedom, with a slight preference for freedom (53% vs. 47%), and there is a declining willingness to consider gun ownership, mainly due to safety concerns. As the data shows, while other non-economic concerns are present, they were selected to a lesser extent by an overwhelming number of respondents compared to the list of economic concerns.

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30 Please see this article: <https://www.ft.com/content/b2f17824-cdfc-4547-abf0-66178a0a747f>

## Respondents yearning to leave their economies, but reluctant to welcome emigrants

Public opinion on immigration in the Western Balkans is complex, reflecting a blend of openness to economic benefits and a desire for controlled migration. While many citizens support immigration to address labour shortages, there is a strong preference for managing migration flows based on specific labour needs. This cautious approach is particularly evident in economies with high outward migration, where there is reluctance to liberalise visa regimes due to concerns over potential large-scale inflows. Although the majority across the region is open to welcoming immigrants, particularly from outside the EU, concerns about integration and security remain prevalent.

The region shows a polarised view of immigration's impact, seeing it both as an opportunity and a threat. While 31% view immigration positively for alleviating labour shortages, 39% worry about job displacement. Similarly, cultural and security concerns divide opinion, with 34% seeing immigration as enriching cultural diversity, contrasted by 40% who fear social tensions. Despite these divisions, a majority across the Western Balkans advocates for a regulated approach to migration, favouring limits that align with specific labour needs. This cautious yet pragmatic stance on immigration reflects broader regional dynamics, including demographic decline and labour market needs, as well as ongoing public and political debates on the best ways to manage migration sustainably.

The 2024 SecuriMeter data reveals significant concerns regarding human security and emigration intentions in the Western Balkans driven by widespread economic dissatisfaction and social instability. Albania stands out with the highest levels of discontent across various indicators, including the economy, public services, and basic needs. Economic struggles such as high prices, inadequate pensions, lack of job opportunities, and poor healthcare access are common across the region, prompting many citizens, especially the young and economically active, to consider emigration. The data shows that temporary emigration remains prevalent, often driven by short-term economic opportunities abroad. Additionally, the pursuit of higher salaries, better living conditions, and improved healthcare are the primary factors motivating emigration across the region, exacerbating demographic decline and posing challenges to long-term economic and social stability.

## Lower resilience beyond basic needs

Household economic well-being across the Western Balkans displays widespread financial vulnerability and limited capacity to afford basic necessities. While a degree of resilience is observed in meeting fundamental needs like food and shelter, a significant proportion of the population faces challenges in managing unexpected expenses and accessing non-essential goods and services.

A striking finding is the limited financial buffer available to most households in the region. Only 37% of respondents report having the capacity to cover unexpected expenses, highlighting a high degree of financial fragility. This means that a significant portion of the population operates with limited savings and is vulnerable to economic shocks, such as job loss or unexpected medical bills. While not a survey, the latest data on consumption expenditure within EU households shows that

the two basic needs such as housing and food occupy less than 50% of the personal/household budget, which would likely be much higher for households across the Western Balkans.

Albania experiences the highest levels of deprivation, with substantial proportions of the population unable to afford basic expenses, access personal vehicles, or replace worn-out furniture. In contrast, Kosovo\* shows lower levels of outright deprivation but remains vulnerable to economic shocks, with many citizens on the brink of financial insecurity. The reliance on public health and pension systems is widespread due to the low uptake of private insurance, raising concerns about the long-term sustainability of these systems amidst high emigration and an aging population. The lack of adequate social safety nets and financial planning contributes to economic vulnerability, indicating a need for comprehensive policy interventions to address these challenges and prevent further social unrest and economic decline.

## **Deep dissatisfaction with public security and social services**

Deep-rooted dissatisfaction in the Western Balkans region is overwhelming and persisting in critical areas. The most pressing concern is the soaring cost of living, with a staggering 76% dissatisfied with price levels. This erodes purchasing power, fuels poverty, and creates widespread economic anxiety. Dissatisfaction with pensions runs high at 67%, reflecting concerns about the adequacy and sustainability of retirement income, particularly given the region's aging population. 53% are dissatisfied with wages and benefits, compared to a mere 17% satisfied, highlighting the need for decent work opportunities and improved labour market conditions.

A pervasive sense of anxiety about healthcare affordability squeezes the Western Balkans, with a majority expressing concerns about their ability to manage even routine medical expenses. This widespread fear, coupled with even greater apprehension about affording treatment for serious illnesses, highlights a pressing need to address healthcare financing and accessibility across the region. A concerning 53% of respondents across the region worry about affording routine healthcare and medications, indicating potential barriers to accessing even basic medical services. This anxiety escalates when considering serious illnesses or accidents, with a staggering 76% worried about affording necessary medication and treatment. This highlights the potential for catastrophic healthcare expenses to devastate families and push them into poverty.

Citizens have mixed feelings about public security measures, with only 7% completely satisfied and 38% mostly satisfied, while 29% are dissatisfied, especially in North Macedonia, Montenegro, and Serbia. Kosovo\* has the highest satisfaction, with 14% completely satisfied, indicating a need for further improvements in law enforcement to enhance community security.

## **Region continues to grapple with low trust in institutions and high levels of perceived corruption**

Institutional trust is notably low across the region, with political parties, social media, parliaments, the press, and television being the least trusted institutions. However, there are some exceptions: religious organisations, the armed forces, police, universities, the European Union, and NATO are relatively more trusted, especially in Albania, Kosovo\*, and North Macedonia. In contrast, Bosnia

and Herzegovina, Montenegro, and Serbia show significantly lower levels of trust in these institutions, reflecting broader societal discontent and scepticism towards political and social structures. Trust in the EU and NATO is particularly low in Serbia, contrasting sharply with the high levels of trust in these institutions in Albania and Kosovo\*, highlighting divergent attitudes towards Euro-Atlantic integration in the region. This overall lack of trust, both socially and institutionally, suggests a need for targeted efforts to build social cohesion and enhance the credibility and effectiveness of public institutions in the Western Balkans.

The SecuriMeter 2024 data highlights that corruption remains a pervasive issue in the Western Balkans, with 83% of citizens perceiving it as widespread, although fewer believe it is "very widespread" compared to the previous year. While there is a slight decline in reports of bribery, particularly in healthcare and police interactions, high-level corruption remains a significant concern. The region's struggle to combat corruption effectively has hindered its EU accession process, as addressing corruption and organised crime are key conditions for progress. Addressing corruption is usually high on agendas of different governments in the economies of the region and features prominently in various reports, including annual EU reports, calling on government to strengthen efforts to combat corruption, especially high-level corruption.

## **Emerging threats: between ambiguousness and worry**

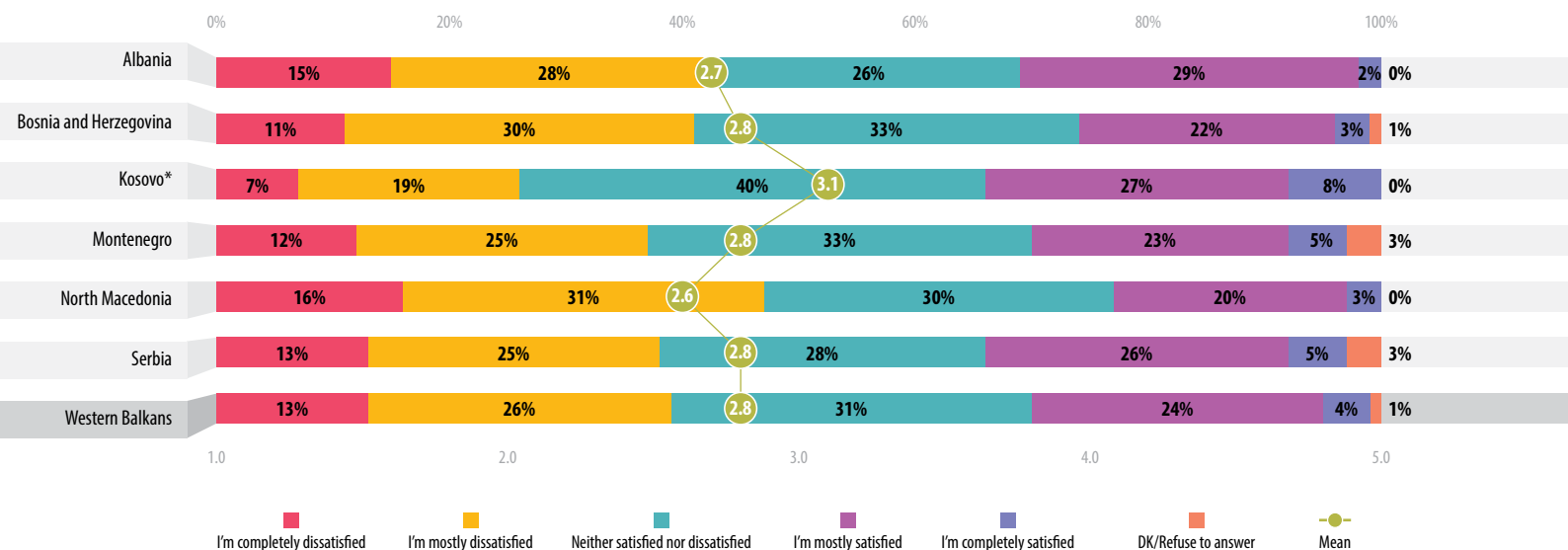
The Western Balkans faces a range of emerging security threats shaped by external conflicts, internal vulnerabilities, technological advancements, and misinformation. Citizens express significant concern about the impacts of wars in the Middle East and Ukraine, with about 40% feeling these conflicts negatively affect their security. Key worries include increased illegal immigration, potential terrorist infiltration, and economic instability, especially given the region's reliance on Russian energy. The ongoing economic crisis, heightened by global supply disruptions and inflation, further exacerbates these insecurities. NATO remains the leading security mechanism, though its support varies across the region, with notable declines in Montenegro and North Macedonia and sharp increases in Kosovo\* and Albania. The European Union is seen as a secondary security framework, with regional security cooperation support continuing to decline due to unresolved political tensions and distrust.

The rapid advancement of artificial intelligence and the widespread dissemination of misinformation add complexity to the region's security landscape. A significant portion of the population views AI as harmful, largely due to concerns over job displacement, privacy, and potential misuse. The spread of misinformation, fuelled by social media and anonymous online platforms, further undermines trust in institutions and media, presenting additional challenges to maintaining political stability and societal cohesion. The Western Balkans' position on the European Media Literacy Index 2023 highlights the region's vulnerability to misinformation, underscoring the need for improved media literacy and stronger regulatory frameworks to combat these emerging threats effectively.

# CHAPTER A: GENERAL SECURITY PERCEPTIONS

This section of SecuriMeter 2024 presents the perceptions of Western Balkan citizens on security in general. The questions posed sought to obtain citizens' perceptions on the present situation in each economy and in the region, the expectations for the next 12 months as well as the main security concerns. As in the previous iterations of SecuriMeter, majority of citizens of the Western Balkans **responded that they are completely or mostly dissatisfied** with the way things are going in their economies (**39%**), another 31% do not take a clear-cut position, while a smaller share of 28% are completely or mostly satisfied. Economy-wise, the citizens of North Macedonia are the most dissatisfied (47%), followed by respondents from Albania (43%) and Bosnia and Herzegovina (41%). Overall, these findings highlight a significant level of dissatisfaction amongst Western Balkan citizens, indicating a critical need for addressing security concerns and improving public perception in the region.

Figure 1. The level of satisfaction with the current state of the economy  
01. How satisfied are you with the way things are going in your economy?  
(All respondents, N=6004, single answer, scale from 1 to 5, share of total, %)



However, despite this overall trend, compared with 2022 and 2023 SecuriMeter, there is a slight **decrease in the percentage of citizens who said that they are completely or mostly dissatisfied** from 45% to 39%. The perception of citizens of Serbia has improved considerably, with a decrease by 19 percentage points compared with 2023 SecuriMeter. Below is a comparative table of data related to the satisfaction with the way things are going in each Western Balkan economy for the years 2021, 2022, 2023 and 2024.

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

Dissatisfied vs Satisfied	Western Balkans	Albania	Bosnia and Herzegovina	Kosovo*	Montenegro	North Macedonia	Serbia
2021	<b>36-33</b>	40-31	43-30	38-12	12-62	52-17	29-43
2022	<b>42-30</b>	58-20	59-17	20-48	38-32	50-20	28-44
2023	<b>45-24</b>	43-31	56-18	26-30	40-26	54-17	48-22
2024	<b>39-28</b>	43-31	41-25	26-35	27-28	47-23	29-31

Despite the overall dissatisfaction, the decreasing trend this year, compared with SecuriMeter 2023, may be explained by an **improvement of regions' economic performance and a reinvigorated EU accession process**. While in the previous three years the economies of the region were coming out of the recession caused by the Covid-19 pandemic and the negative effects on inflation, the disruption of energy supplies caused by the war in Ukraine and the overall uncertainty about the future effects of the war, the second half of 2023 showed positive economic trends. By the end of 2023 the levels of real GDP in the Western Balkan economies surpassed the pre-pandemic levels, the regional labour market performed well, unemployment declined across the region, the real wages increased, and the poverty rate declined.<sup>31</sup> A positive outlook for the region is foreseen for the next 3 years with the real GDP growth expected to grow between 3.2% and 3.8%.

Responding to the strategic uncertainties caused by the war in Ukraine, the EU undertook renewed steps to reinvigorate the accession process and support the economies of the region to speed up the reforms. Screening process with Albania and North Macedonia was completed in 2023 while in the first half of 2024 the EU opened accession talks with Bosnia and Herzegovina and endorsed the rule of law benchmarks for Montenegro which is now ready to move to the final stage of EU accession. The EU adopted a Growth Plan for the Western Balkans, which aims to bring the region closer to the EU by offering some of the benefits of EU membership to the region before becoming full members. In addition to speeding up accession, Growth Plan aims to boost economic growth and accelerate socio-economic convergence. The Growth Plan has the ambition to double the size of the Western Balkan economies within the next 10 years and has been welcomed by the governments and the citizens of the region, and these positive developments might be leading to an **improved perception on the general outlook** of the respective economies.<sup>32</sup>

31 International Bank for Reconstruction and Development / The World Bank. 'Western Balkans Regular Economic Report No.25 | Spring 2024. Invigorating Growth 2024'

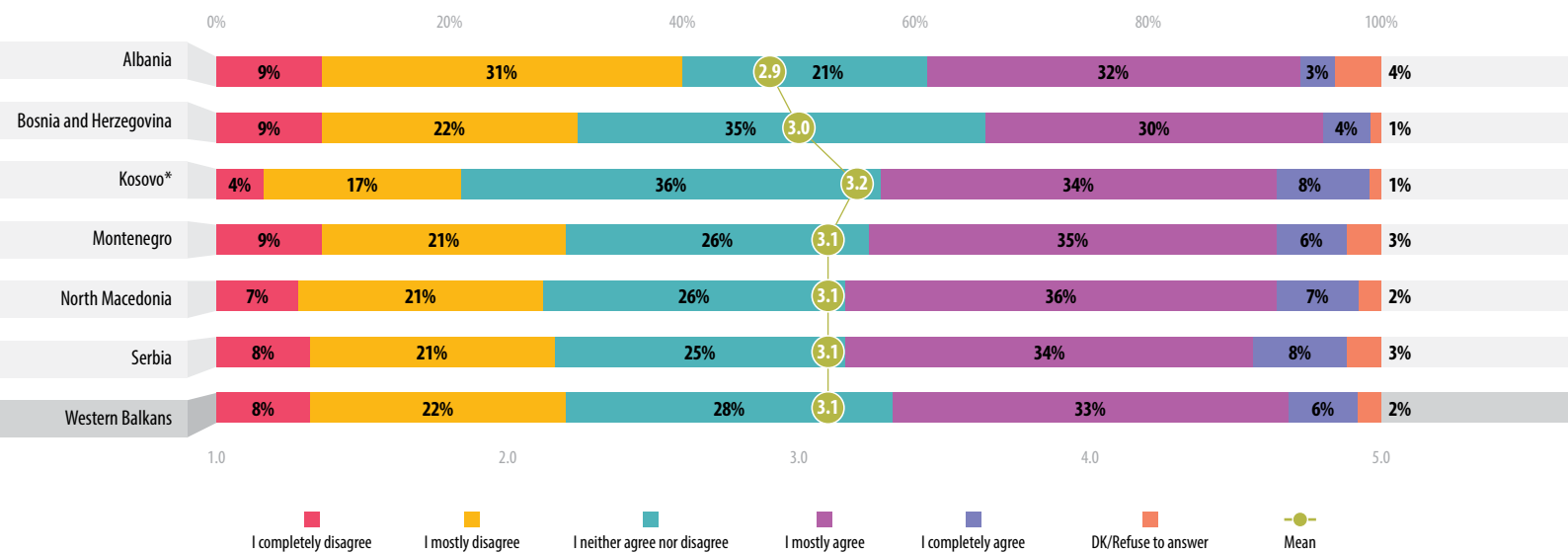
32 European Commission. New Growth Plan for the Western Balkans. Online: [https://neighbourhood-enlargement.ec.europa.eu/document/download/75354ed6-6f5a-426e-9f29-f1c77ce8ce18\\_en?filename=NewGrowthPlan-WB-April%202024.pdf](https://neighbourhood-enlargement.ec.europa.eu/document/download/75354ed6-6f5a-426e-9f29-f1c77ce8ce18_en?filename=NewGrowthPlan-WB-April%202024.pdf)

## Security in the Western Balkans

When it comes to the perceptions of security, 39% of citizens believe that the Western Balkans is a safe place to live, either strongly agreeing or somewhat agreeing with this statement. However, the share of the respondents who completely agree that the region is a secure place to live in is much smaller, ranging between 3% and 8% in different economies. The largest share of respondents tends to be reserved in their position. About a third completely agree or tend to agree that the region is a secure place to live, while 28% do not take a clear position.

Figure 2. Security in the Western Balkans

02. Do you agree that Western Balkans is a secure place to live in?  
(All respondents, N=6004, single answer, scale from 1 to 5, share of total, %)



Albania is the economy with the highest share of citizens (40%) who completely disagree or mostly disagree that the region is a secure place, followed by the citizens of Bosnia and Herzegovina and Serbia. Kosovo\* has the largest share of respondents (42%) who think that the Western Balkans is a secure region. The tensions in the relations between Serbia and Kosovo\*, the ethnic tensions in Bosnia and Herzegovina that is putting the economy-level institutions under pressure coupled with the fears that the Russian and other external influence may lead to a renewed armed conflict by stirring ethnic tensions, are also to be considered when interpreting these trends.<sup>33</sup>

The comparison of data from the SecuriMeter 2022, 2023 and 2024 shows that in general there have been **no bigger variations over the last three years regarding the feeling of security in the region**. The share of citizens who completely agree that the region is a secure place to be has been small along the years, and equally of those who think the region is completely insecure.<sup>34</sup> In this setting, a very large majority of citizens tend to lean towards ambiguity when choosing the op-

33 Stefano Fella. Security in the Western Balkans. House of Commons Library. April 2024. <https://commonslibrary.parliament.uk/research-briefings/cdp-2024-0089/>

34 The question in the 2022 and 2023 SecuriMeter did not include the variable "neither agree nor disagree"; therefore, to make the comparison valid only the data on the variables "totally agree" and "totally disagree" have been selected for analysing the trend over the years for this question.

tions given to them. Nonetheless, compared with SecuriMeter 2023 data there is a **decline in the share of citizens who totally/completely agree that the Western Balkans is a secure place to live in**, a return to the values observed in 2022 (See table 2 below).

Table 2. Percentage of citizens who totally agree or totally disagree that Western Balkans is a secure place to live in: Comparative of SecuriMeter 2022, 2023 and 2024 data

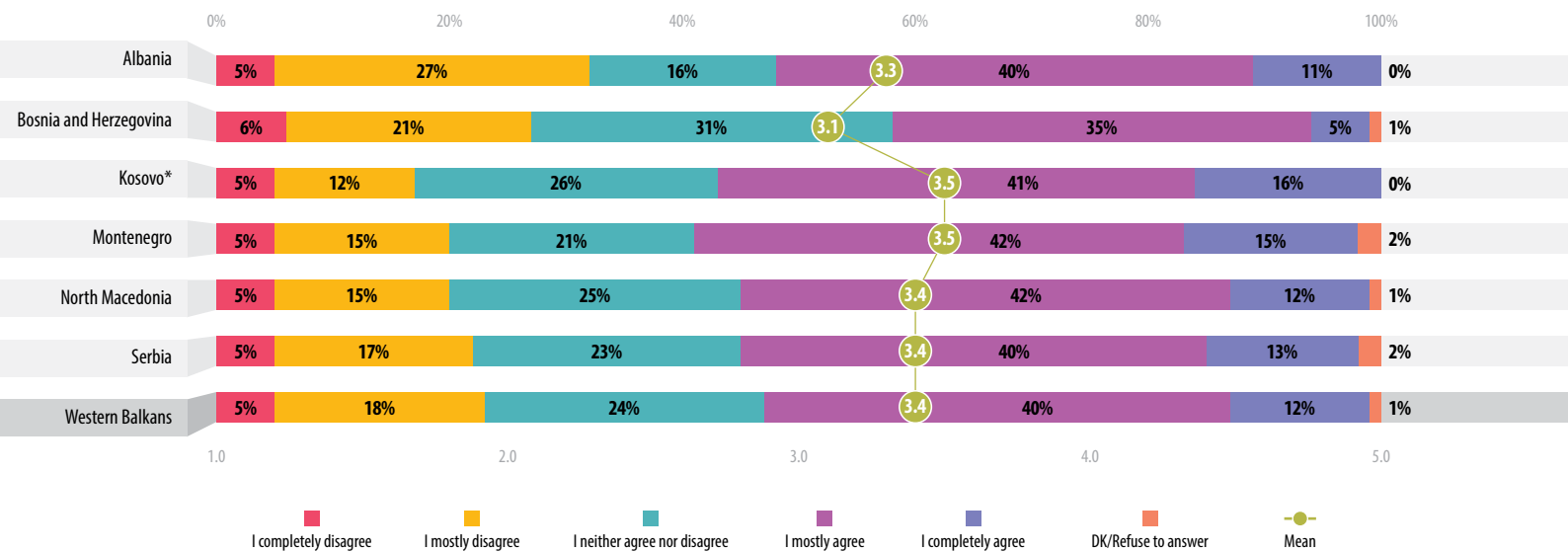
Totally agree vs totally disagree	Western Balkans	Albania	Bosnia and Herzegovina	Kosovo*	Montenegro	North Macedonia	Serbia
2022	<b>6-10</b>	3-5	4-19	9-4	4-13	8-12	10-5
2023	<b>10-12</b>	15-5	7-12	15-16	6-12	11-16	6-13
2024	<b>6-8</b>	3-9	4-9	8-4	6-9	7-7	6-8

## Security in your Economy

As in the SecuriMeter 2023, **more respondents across the region feel secure about their economies than the region**. More than half of the respondents (52%) agree completely or mostly that their respective economies are a secure place to live in, while less than a half of this figure (23%) disagrees completely or mostly. Montenegro and Kosovo\* have the highest share of citizens who completely or mostly agree (57%) that their economies are secure to live in, followed by North Macedonia (54%). Albania has the highest share of respondents who completely or mostly disagree that their economy is a secure place to live in (32%) but also the lowest share of those who do not take a clear position (27%). While there are similarities in the security concerns in all economies of the region, the common denominator that may serve as an explanatory variable for these variations across the economies is the performance on anticorruption. Montenegro, North Macedonia and Kosovo\* are the best performing economies in the Transparency International Corruption Perceptions Index (see Section G on Corruption).

Figure 3. Security in your economy

03. Do you agree that your economy is a secure place to live in?  
(All respondents, N=6004, single answer, scale from 1 to 5, share of total, %)





The share of citizens who completely agree that their respective economies are secure is considerably higher than those who think the same about the region. Bosnia and Herzegovina makes an exception, with the closest values for both the security in the economy and security in the region, showing the high level of security volatility that the economy is facing.<sup>35</sup>

Table 3. Percentage of respondents who completely or mostly agree that the Western Balkans is a secure place to live in versus those who completely or mostly disagree that their economy is a secure place to live in

Western Balkans vs My economy	Western Balkans	Albania	Bosnia and Herzegovina	Kosovo*	Montenegro	North Macedonia	Serbia
2024	<b>39-52</b>	35-51	34-40	42-57	41-57	43-53	39-52

Such variations in citizens' perceptions regarding security of the region and the respective economies indicate that the **Western Balkans has yet to evolve into a security community** that shares dependable expectations of peaceful change and in which the use of large-scale violence has become very unlikely.<sup>36</sup>

## Future Security in the Western Balkans

Regarding the security situation in Western Balkans for the next 12 months, only **about a third (31%) of respondents are completely or mostly positive that the region will be a more secure place to live in**. The respondents in Albania and Bosnia and Herzegovina have the largest share of citizens who have a negative outlook for the security in the region (36% and 34% respectively) while Kosovo\* has the smallest share of citizens that have a negative outlook for the next year. This trend shows an increased level of anxiety of the citizens regarding the region's security, mostly spurred by a range of factors as outlined above. The increased tensions in the Middle East and the risk of a regional war that may have spillover effects are also to be counted (see section on emerging security threats questions 41-43). Montenegro has the highest share of respondents (40%) who have a positive outlook for security for the next year. The lowest level of corruption in comparative regional terms and the progress in the process of EU accession negotiations may have largely affected the perceptions of Montenegrin citizens.

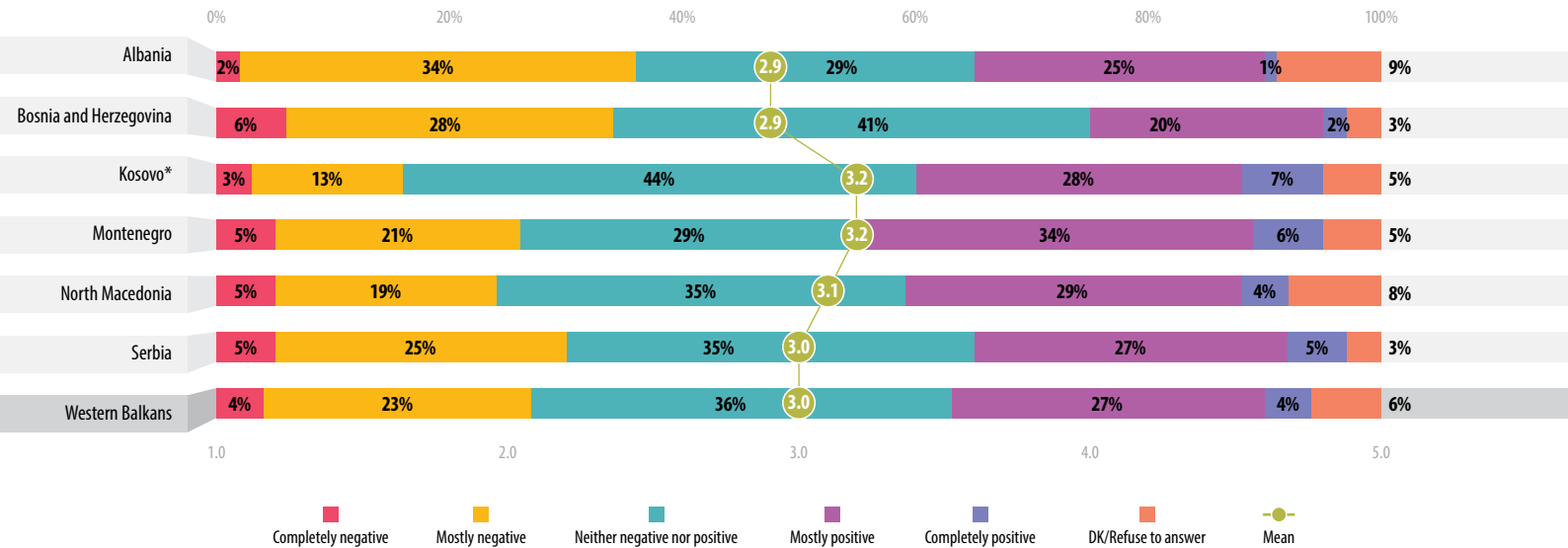
35 Stefano Fella. Bosnia and Herzegovina: secessionism in the Republika Srpska. House of Commons Library. April 2024. <https://researchbriefings.files.parliament.uk/documents/CBP-10013/CBP-10013.pdf>

36 • Gajic, Sonja Stojanovic, and Filip Ejodus, eds. Security community practices in the Western Balkans. Routledge, 2018.  
 • Grillot, Suzette R., Rebecca J. Cruise, and Valerie J. D'erman. "Developing security community in the Western Balkans: The role of the EU and NATO." *International Politics* 47 (2010): 62-90.

Figure 4. Future Security in the Western Balkans

04. If you consider all the current international and regional developments, in your opinion, what will the security situation in Western Balkans be in the next 12 months?

(All respondents, N=6004, single answer, scale from 1 to 5, share of total, %)



It should be noted that the citizens are **even less optimistic regarding the security perspective of the region** compared with the SecuriMeter 2023. The share of citizens who totally agree that security will improve in the next 12 months has decreased in all economies, particularly in Albania by 12 percentage points, and in North Macedonia by 8 percentage points.<sup>37</sup> Against the context of Russian aggression, the rising interethnic tensions driven by forces of political polarisation, ethnonationalism, and secessionism, Western Balkans feels a disproportionate sense of insecurity for the future. The region's geopolitical relations with Russia, China and Middle Eastern countries pose challenges, as polarisation and identity politics often become subject to exploitation that negatively affects the citizens feelings about security.<sup>38</sup>

Table 4. Percentage of citizens who totally agree versus those who totally disagree that Western Balkans will be more secure a secure place to live in the next 12 months. Comparison of SecuriMeter 2023 and 2024 data

Totally agree vs totally disagree	Western Balkans	Albania	Bosnia and Herzegovina	Kosovo*	Montenegro	North Macedonia	Serbia
2023	11-12	14-4	8-9	14-16	11-9	12-20	8-12
2024	4-4	2-1	2-6	7-3	6-5	4-5	4-4

37 The question in the 2022 and 2023 SecuriMeter did not include the variable "neither agree nor disagree"; therefore only the data on the variables "totally agree" and "totally disagree" have been selected for analysing the trend in order to make the comparison valid over the years.

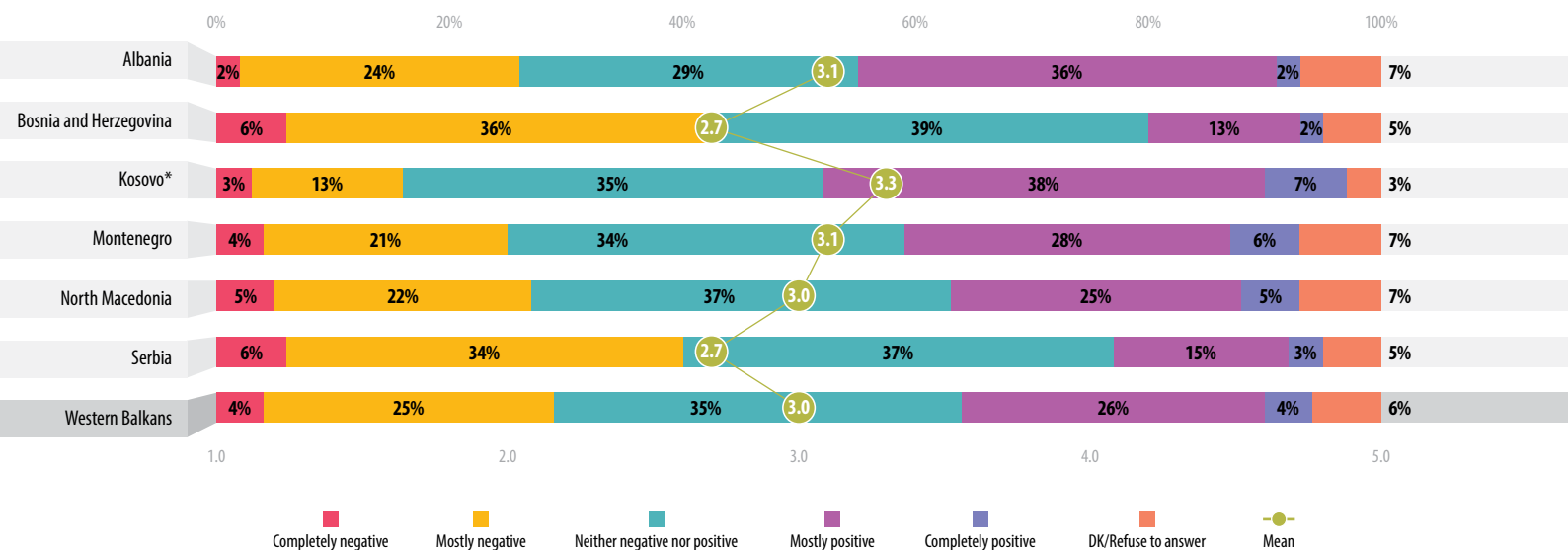
38 Mark Lancaster. Western Balkans: Renewed Security Challenges on NATO'S Doorstep. NATO Parliamentary Assembly. April 2024. <https://www.nato-pa.int/download-file?filename=/sites/default/files/2024-05/050%20DSCFC%2024%20E%20rev1%20-%20WESTERN%20BALKANS%20-%20LANCASTER%20REPORT.pdf>

## Impact of International Developments on Your Economy's Security

This close relationship between regional security and security of the respective economies appears evident in the responses obtained to the question on citizens' expectations of security of their economies in the next 12 months. There is a **general sense of insecurity for the future in each of the economies of the region compared with the present**. Differently from the security feeling regarding their economies at the present, at the regional level respondents are almost equally split when it comes to expectations of security in the near future. 30% think that security situation will be completely or mostly positive and another 29% say that it will be completely or mostly negative. Economy-wise, a higher share of **respondents in Kosovo\* and Albania are more optimistic about the security situation in their economy**. 45% and 38% respectively expect security to be mostly or completely positive in the next 12 months. The **citizens of Bosnia and Herzegovina and Serbia are the least optimistic** with 15% and 18%, respectively, believing that the security situation will be mostly or completely positive. It is worth noting that Albania, Bosnia and Herzegovina, and Serbia have a very small share of citizens who think that security situation will be completely positive, close to the margin of error (between 2% and 3%). The general sense of insecurity for the future that is evidenced by data throughout the years is reflective of the region's unresolved issues after the wars that followed the collapse of Yugoslavia. Each economy's historical grievances, the divisive rhetoric fanned by political leaders for short term electoral benefits, region's lagging behind in terms of good governance and economic prosperity,<sup>39</sup> coupled with the dynamics of security developments such as geopolitical rivalries, contribute to creating a sense of insecurity for the future at any time till these issues are overcome.

Figure 5. Impact of International Developments on Your Economy's Security

05. How do you think the same international and regional developments will affect the security situation in your economy in the next 12 months?  
(All respondents, N=6004, single answer, scale from 1 to 5, share of total, %)



39 International Crisis Group. Managing the Risks of Instability in the Western Balkans. Europe Report N°265, 7 July 2022. [https://www.crisisgroup.org/sites/default/files/265-risks-of-instability-western-balkans\\_1.pdf](https://www.crisisgroup.org/sites/default/files/265-risks-of-instability-western-balkans_1.pdf)

As with the trends in the perceptions of the present security of the region, the increased region's interdependence with international developments greatly affects the citizens' outlook for their economies.

## Level of Citizens' Concern about Situations

The **possibility of a war between the economies of the Western Balkans is perceived as a security concern** when given the alternative to choose amongst a range of scenarios that may threaten the region. The majority (48%) responded that **a war between the economies of the region** is much likely or there is a good deal of likelihood that such thing may happen. A smaller share of respondents (44%), yet the majority, think the same of the possibility of a war involving their economy (the question did not ask to specify the potential warring party). Such a feeling is echoed by the NATO which in the 2024 Washington Summit Declaration underlined that Western Balkans is of strategic importance for the Alliance, a position that has been underpinned by an increased military and diplomatic presence in the region.<sup>40</sup> The possibility of a terrorist attack or a civil war is seen much likely or there is a good deal of likelihood to happen by two fifth of the respondents, 41% and 40% respectively. The citizens of Serbia are more concerned of the possibility of war, the highest in the region (58%), followed by Bosnia and Herzegovina 51%, and Montenegro 49%. Despite the complex situation with Serbia, Kosovo\* citizens are the least concerned in the region that their economy may be involved in a war. In general, a smaller share of Kosovo\* respondents showed concern even for the likelihood of their economy being involved in a war with another economy of the Western Balkans, suffering a terrorist attack or a civil war. A large majority of the respondents in Bosnia and Herzegovina (58%) are concerned that their economy may be involved in a war with another economy of the Western Balkans and almost the same percentage (56%) are worried that their economy may be involved in a civil war. The large majority of Serbian citizens (56%) also are concerned that their economy may be involved in a war with another economy of the Western Balkans, while in North Macedonia 49% are concerned of a terrorist attack, the largest share of respondents in the region.

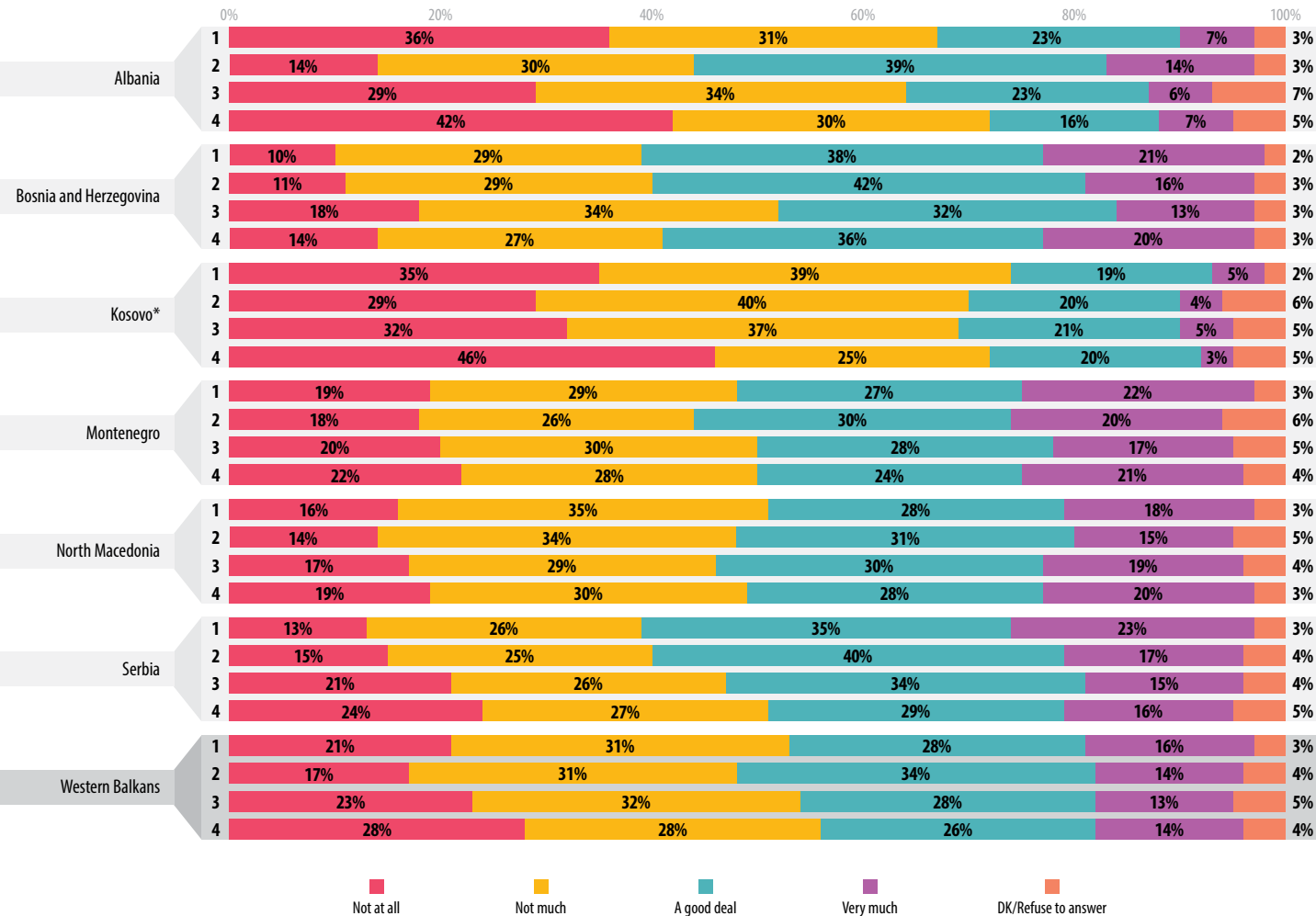
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40 NATO. Washington Summit Declaration. Press Release 2024 001.  
[https://www.nato.int/cps/en/natohq/official\\_texts\\_227678.htm](https://www.nato.int/cps/en/natohq/official_texts_227678.htm)

Figure 6. Level of Citizens' Concern about Situations (Scale 1 to 4)

06. To what degree are you worried or not about the following situations? Please use a scale from 1 to 4 where 1 means "not at all" and 4 means "very much"

1) A war involving my economy; 2) A war between the economies of the Western Balkans; 3) A terrorist attack; 4) A civil war.



## Conclusions

The **majority of citizens of the region are not satisfied** with the way things are going in their economies, although there is a slight improvement compared with 2023 which shows a **decrease in the share of respondents who said that they are completely or mostly dissatisfied**. This is largely owed to the improvement of economic performance following the recession by Covid-19 pandemic and the recovery from the inflation which peaked in 2022, the beginning of the war in Ukraine and an increased interest of the EU in the region which has led to a reinvigorated accession process and more funds allocated to support economic development and reforms.

Similar trends are observed with regards to the perception of security in the region. The majority of citizens do not think that the **Western Balkans is a secure place to live in**. This trend has been relatively stable for the last three years but compared with 2023 **there is a decline in the share of**

**respondents who totally agree that the Western Balkans is a secure place to live in**, a return to the values observed in 2022.

Even when it comes to the perception of security in the region, **more citizens (39%) responded that they completely agree or tend to agree that the Western Balkans is a secure place to live in**. However, the share of respondents who completely agree that the region is a secure place to live in is much smaller, ranging between 3% and 8%. Less citizens are optimistic about regional security in the next 12 months, showing an increased level of anxiety of the citizens regarding the region's security. Albania and Bosnia and Herzegovina have the largest share of the citizens who have a negative outlook for the security in the region.

The main factors associated with this outlook are related to the continued and even heightened tensions in relations between Serbia and Kosovo\*, heightened ethnic tensions in Bosnia and Herzegovina, coupled with the fears that the malign external influences may stir a renewed armed conflict. The increased tensions in the Middle East and the risk of a regional war that may have spillover effects have to be taken in consideration too.

This level of anxiety is reflected in the fears **of a possible war between the economies** of the Western Balkans. The majority of respondents do not exclude the possibility of a **war involving the region or a war between the economies of the region**. The citizens of Serbia, Bosnia and Herzegovina, and Montenegro are more concerned about the possibility of war.

While more respondents across the region **feel more secure about their economies than the security in the region**, the factors outlined above are to be counted for the **general sense of insecurity for the future** observed in all economies of the region compared with the present.

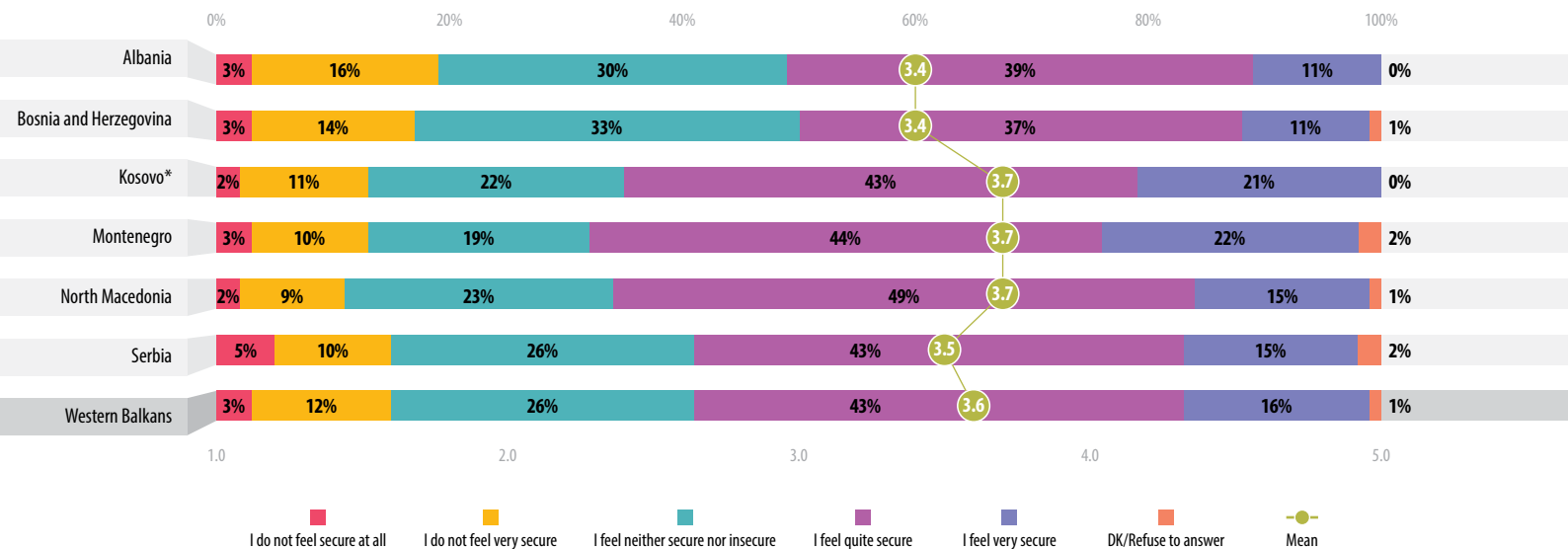
# CHAPTER B: PERSONAL SECURITY PERCEPTIONS

## Current Sense of Security

This section sought to obtain citizens' **perceptions of personal security** by focusing on questions related to the general feeling of security, provision of their personal security influence by a variety of factors, satisfaction with public security measures and individual measures undertaken to boost personal security.

While security of the economy and personal security sometimes overlap, they are often not the same. **The majority of citizens responded that they feel very secure or quite secure (59%)** on the personal level. In individual economies, Montenegro has the highest share of citizens who feel the same way (66%), followed by North Macedonia and Kosovo\* (64%). Bosnia and Herzegovina and Albania have the lowest share of citizens who feel the same way.

**Figure 7. Current Sense of Security**  
 07. Could you tell me how secure do you feel these days?  
 (All respondents, N=6004, single answer, scale from 1 to 5, share of total, %)



Compared with the responses on security of the region and security of the respective economies, a higher share of citizens feel personally secure (see table 5 below). Economy-wise, almost the same share of respondents in Albania feel the same about the security of the economy and the personal security, while Bosnia and Herzegovina has the lowest share of respondents who feel personally secure.

Table 5. Percentage of respondents who completely or mostly agree that the Western Balkans is a secure place to live in versus those who completely or mostly disagree that their economy is a secure place to live in versus those who personally feel very secure or quite secure

	Western Balkans	Albania	Bosnia and Herzegovina	Kosovo*	Montenegro	North Macedonia	Serbia
Western Balkans is a secure place to live in	39	35	34	42	41	43	39
My economy is a secure place to live in	52	51	40	57	57	53	52
I personally feel very secure or quite secure	59	50	48	54	66	64	58

## Frequency of Neighbourhood Events in the Western Balkans

From a list of issues that the citizens were asked to provide their experiences with (obtained by hearing or seeing), the **large majority of respondents reported the problem of people begging in the street** (60%), followed by alcohol consumption in the streets (41%). Despite their importance and relevance, the issues reported as experienced by most respondents do not represent a major threat to personal security. Although begging has been identified as an issue for the region many years ago, it remains unresolved and continues to affect public perception of security. Rather than posing a physical security threat, begging affects mostly emotional security, as citizens may feel for these vulnerable people and may be keen to help but on the other hand, they are aware that this is a broader social responsibility that need to be addressed by the institutions. Due to ineffective safety nets and the role of criminal networks that often take advantage of the vulnerable people from marginalised communities or with disabilities, including children, begging remains the top issue that affects personal security.<sup>41</sup> Domestic violence and street violence which are important issues for evaluating personal security are reported by a smaller, yet important share of respondents, 29% and 27% respectively.

In addition to the issues of begging and alcohol consumption in the streets, other significant events have a more direct impact on individuals' sense of security. These include discriminatory behaviour or verbal harassment targeting ethnic and religious identity, sexual harassment, and domestic violence, which are less frequently mentioned but have a stronger correlation with personal feelings of insecurity. For example, 17% of the population in the Western Balkans has reported facing harassment based on ethnic or religious identity, and this percentage rises to 27% amongst those who identify as minorities in their communities. The frequency of sexual harassment stands at 19%, with a relatively even distribution across the region. Moreover, domestic violence is reported by 29% of respondents, with Bosnia and Herzegovina leading at 42%. These forms of harassment and violence pose more significant threats to individuals' sense of personal security than issues

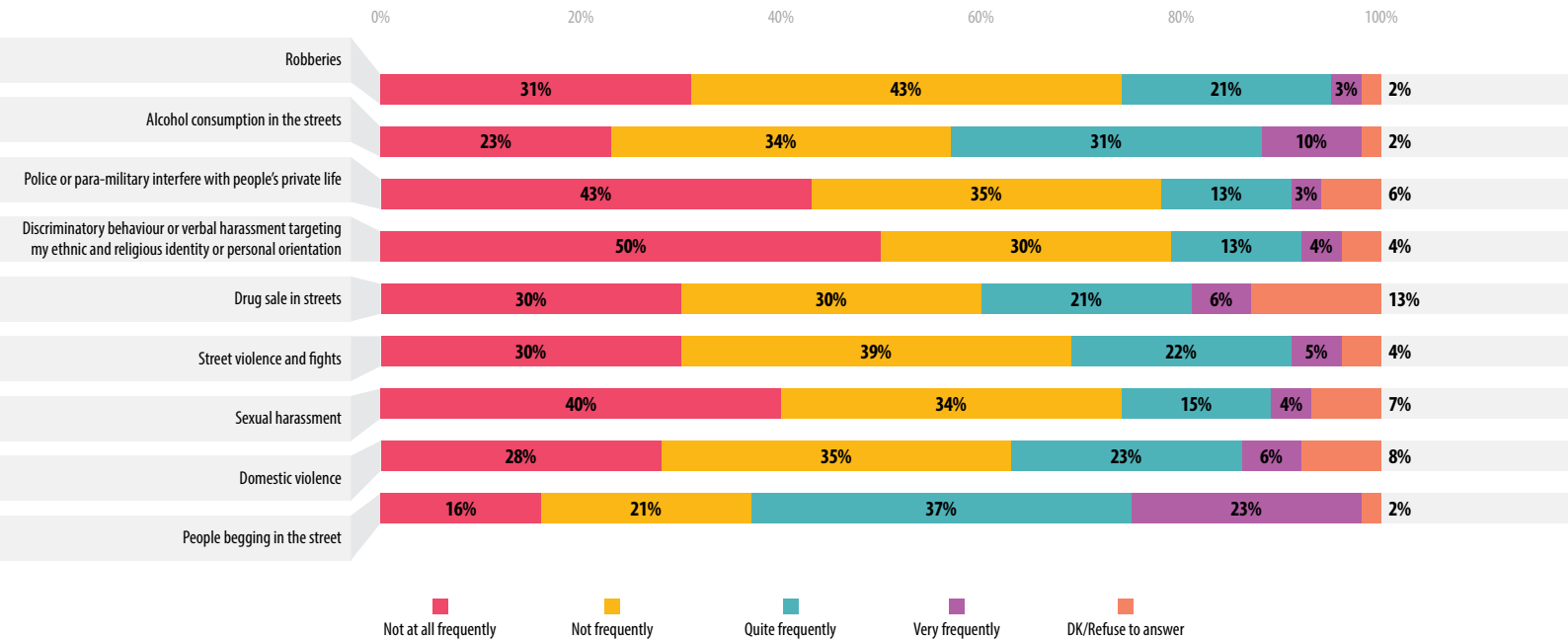
41 • Saša Đorđević and Vanja Petrović. Forced-to-work: Labour exploitation in the Western Balkans. Global Initiative Against Transnational Organized Crime. August 2024. <https://globalinitiative.net/wp-content/uploads/2024/07/Sasa-Dordevic-Vanja-Petrovic-Forced-to-work-Labour-exploitation-in-the-Western-Balkans-GI-TOC-August-2024.pdf>  
 • UNICEF Albania. The grass is not greener on the other side. July 2024. <https://www.unicef.org/albania/stories/grass-not-greener-other-side>  
 • Haris Rovcanin. Bosnia Struggles to Address Child Begging Problem. BIRN, February 8, 2017. <https://balkaninsight.com/2017/02/08/bosnia-struggles-to-address-child-begging-problem-02-07-2017/>  
 • Saferworld. Begging in Kosovo and its impact on people's safety. Prishtina 2014. <https://www.saferworld-global.org/downloads/pubdocs/begging-in-kosovo-and-its-impact-on-peoples-safety.pdf>



like alcohol consumption or begging, which, although prevalent, do not have as strong a negative impact on personal security perceptions.

**Figure 8. Frequency of Neighbourhood Events in the Western Balkans (Scale 1 to 4)**

08. How frequently do you hear about or see the following things occur in your neighbourhood? Please use a scale from 1 to 4 where 1 means "not at all frequently" and 4 means "very frequently". – Results for the Western Balkans region  
(All respondents, N=6004, single answer, scale from 1 to 4, share of total, %)



## Frequency of Neighbourhood Events by Economies

Economies-wise, the three problems that a larger share of Albanian citizens report to experience occurring quite frequently and very frequently in their neighbourhoods are people begging in the street 57%, alcohol consumption in the streets (30%), and drug sales in the streets (23%). In Bosnia and Herzegovina, people begging in the street is the phenomena that the citizens express most concern about (75%), which is also the absolute largest in the region, followed by alcohol consumption in the streets (54%) and domestic violence (42%). In Kosovo\*, people begging in the street (57%), robberies (20%), and street violence and fights (18%) are reported as the three main problems by the largest share of respondents. Kosovo\* stands out as the economy in which a comparatively lower share of respondents report such problems occurring in their neighbourhoods. In Montenegro, the problems reported by the larger share of respondents include people begging in the street (64%), alcohol consumption in the streets (36%), and street violence and fights (36%). In North Macedonia, the problems reported are people begging in the street (57%), alcohol consumption in the streets (45%), and robberies (35%) while in Serbia, people begging in the street (57%), alcohol consumption in the streets (45%), and domestic violence (35%) are reported by the majority of respondents. Despite slight variations due to specific socio-economic problems in each economy, the same trends are observed overall.

**Table 6. Frequency of Neighbourhood Events by Economies (Scale 1 to 4)**

08. How frequently do you hear about or see the following things occur in your neighbourhood? Please use a scale from 1 to 4 where 1 means "not at all frequently" and 4 means "very frequently". – Results by economies  
1) Robberies; 2) Alcohol consumption in the streets; 3) Police or para-military interfere with people's private life;  
4) Discriminatory behaviour or verbal harassment targeting my ethnic and religious identity or personal orientation;  
5) Drug sale in streets; 6) Street violence and fights; 7) Sexual harassment; 8) Domestic violence; 9) People begging in the street (All respondents, N=6004, single answer, scale from 1 to 4, share of total, %)

		1	2	3	4	5	6	7	8	9
Albania	Not at all frequently	27%	23%	50%	69%	31%	42%	45%	28%	16%
	Not frequently	51%	45%	32%	22%	31%	42%	32%	40%	26%
	Quite frequently	19%	27%	9%	6%	18%	10%	15%	20%	37%
	Very frequently	2%	3%	0%	1%	5%	1%	2%	2%	20%
	DK/Refuse to answer	1%	2%	8%	2%	15%	5%	6%	10%	0%
Bosnia and Herzegovina	Not at all frequently	32%	16%	33%	36%	26%	23%	35%	21%	9%
	Not frequently	39%	27%	40%	37%	32%	40%	41%	32%	14%
	Quite frequently	24%	41%	20%	18%	23%	29%	15%	31%	41%
	Very frequently	3%	13%	3%	5%	6%	4%	3%	11%	34%
	DK/Refuse to answer	2%	2%	4%	3%	14%	3%	6%	5%	2%
Kosovo*	Not at all frequently	37%	37%	47%	65%	37%	38%	48%	35%	20%
	Not frequently	43%	45%	39%	25%	35%	44%	34%	37%	25%
	Quite frequently	19%	16%	12%	8%	16%	16%	9%	14%	40%
	Very frequently	1%	1%	1%	1%	1%	2%	5%	2%	14%
	DK/Refuse to answer	0%	1%	1%	1%	12%	1%	4%	11%	0%
Montenegro	Not at all frequently	34%	23%	35%	37%	24%	24%	36%	28%	14%
	Not frequently	42%	28%	39%	37%	33%	36%	37%	34%	20%
	Quite frequently	20%	33%	15%	17%	26%	28%	16%	26%	41%
	Very frequently	2%	13%	4%	5%	8%	8%	4%	7%	23%
	DK/Refuse to answer	2%	2%	7%	4%	9%	4%	7%	5%	2%
North Macedonia	Not at all frequently	20%	19%	52%	45%	31%	29%	41%	27%	18%
	Not frequently	43%	32%	23%	28%	24%	36%	27%	35%	21%
	Quite frequently	28%	33%	10%	15%	23%	23%	15%	23%	32%
	Very frequently	7%	12%	5%	6%	9%	9%	5%	7%	26%
	DK/Refuse to answer	2%	5%	10%	6%	13%	4%	12%	8%	2%
Serbia	Not at all frequently	37%	17%	41%	46%	34%	25%	37%	27%	20%
	Not frequently	40%	25%	36%	31%	25%	38%	33%	31%	20%
	Quite frequently	18%	39%	13%	12%	19%	24%	17%	25%	34%
	Very frequently	3%	16%	4%	5%	8%	8%	4%	9%	23%
	DK/Refuse to answer	3%	3%	7%	6%	14%	6%	8%	7%	4%

The table below presents the regional average for the issues that citizens report occurring very frequently or quite frequently and the economies in which the reported issues are above the regional average. It is observed that in Bosnia and Herzegovina, as well as in Montenegro and North Macedonia, the majority of issues are reported above the regional average. Also noticeable is the fact that no issue appears to be above the regional average in Albania and Kosovo\*.

Table 7. Regional average for the phenomena the that citizens report occurring very frequently or quite frequently and economies in which the phenomena in reported by a percentage above the regional average

	Western Balkans	Albania	Bosnia and Herzegovina	Kosovo*	Montenegro	North Macedonia	Serbia
1. Robberies	24		27			35	
2. Alcohol consumption in the streets	41		54		55	45	45
3. Police or para-military interfere with people's private life	16		23				
4. Discriminatory behaviour or verbal harassment targeting my ethnic and religious identity or personal orientation	17		23		22	21	
5. Drug sale in streets	27		29		34	32	
6. Street violence and fights	27		31		36	32	
7. Sexual harassment	19				20	20	21
8. Domestic violence	29		42		35	30	34
9. People begging in the street	60		75		64		

## Security Measures Taken by the Citizens

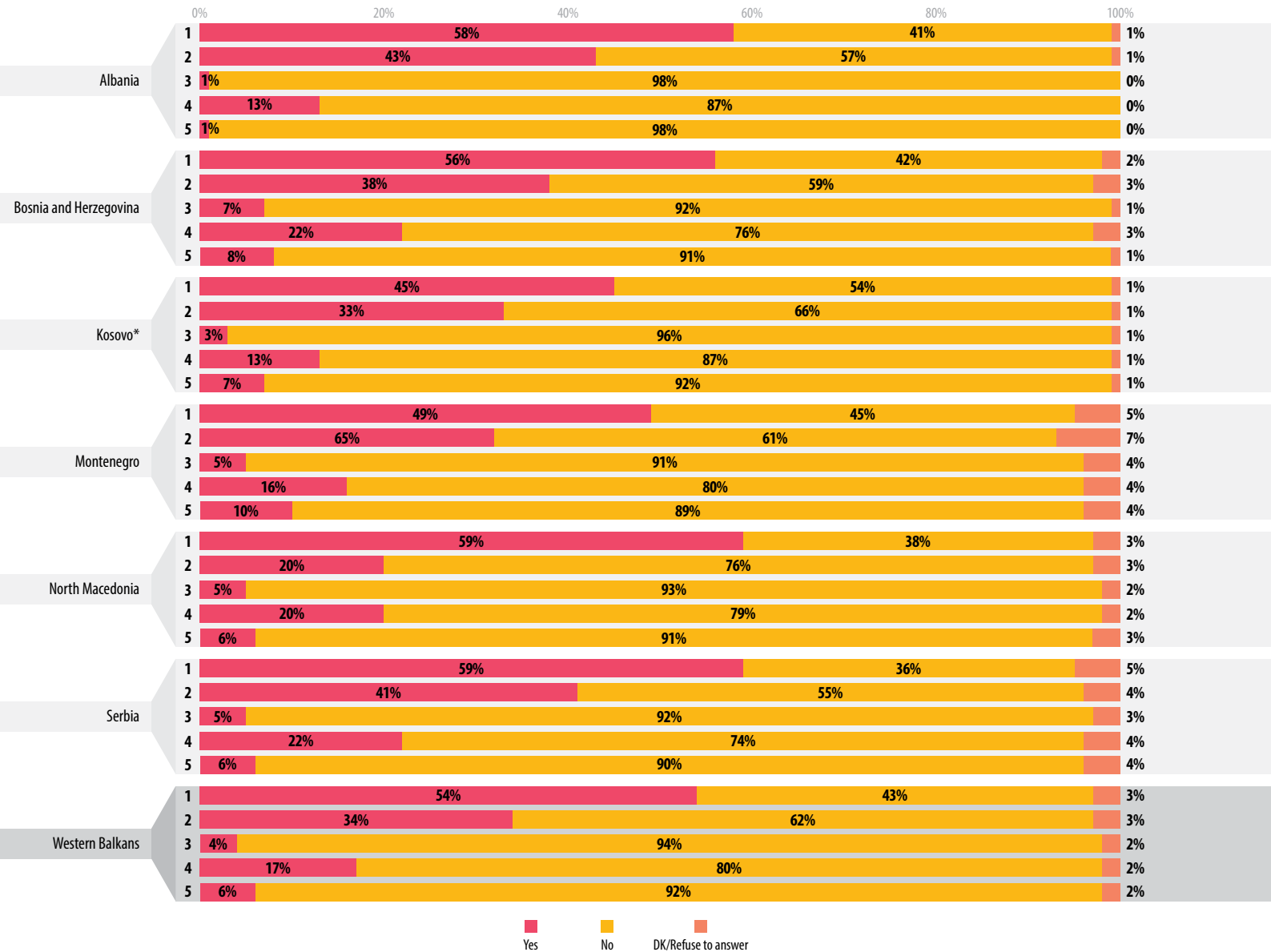
The citizens were asked to provide information on the measures they have undertaken individually or as a household to respond to security concerns they felt. The majority of respondents said that they did not carry much money with them (54%), or did not go out at night (34%) for security reasons. Gender-wise, a **higher share of women respondents chose not to carry much money with them or not to go out at night**, 59% and 44% respectively. A smaller share responded to have installed a security camera (17%) and a much smaller share said that they have to disguise their ethnic or religious identity or personal orientation for security reasons (6%), or **carry a weapon** being it a knife, gun or other type (4%). However, despite the small share of respondents in relative terms, it is concerning that in absolute figures **over one million citizens of the region** feel that they have to disguise their ethnic or religious identity or personal orientation for security reasons, and equally concerning is that for the same reason about **700,000 people carry a weapon**.<sup>42</sup>

42 The region has 17.3 million people (Albania 2.8 million, Bosnia and Herzegovina 3.5 million, Kosovo\* 1.8 million, North Macedonia 1.8 million, Serbia 6.8 million, Montenegro 0.6 million).

Figure 9. Security Measures Taken by the Citizens

09. Which of the following things have you done for reasons of security?

1) Didn't carry much money; 2) Preferred not to go out at night; 3) Carried a knife, gun or other weapon; 4) Installed video surveillance or burglar alarm in your place of living; 5) Disguising my ethnic, religious identity or personal orientation. (All respondents, N=6004, single answer, share of total, %)



Economy-wise, Montenegro, Bosnia and Herzegovina, and Kosovo\* have the highest share of respondents who say that they have to **disguise their ethnic or religious identity or personal orientation for security reasons** (10%, 8% and 7%). Bosnia and Herzegovina has the highest share of respondents in the region carrying weapons (7%).

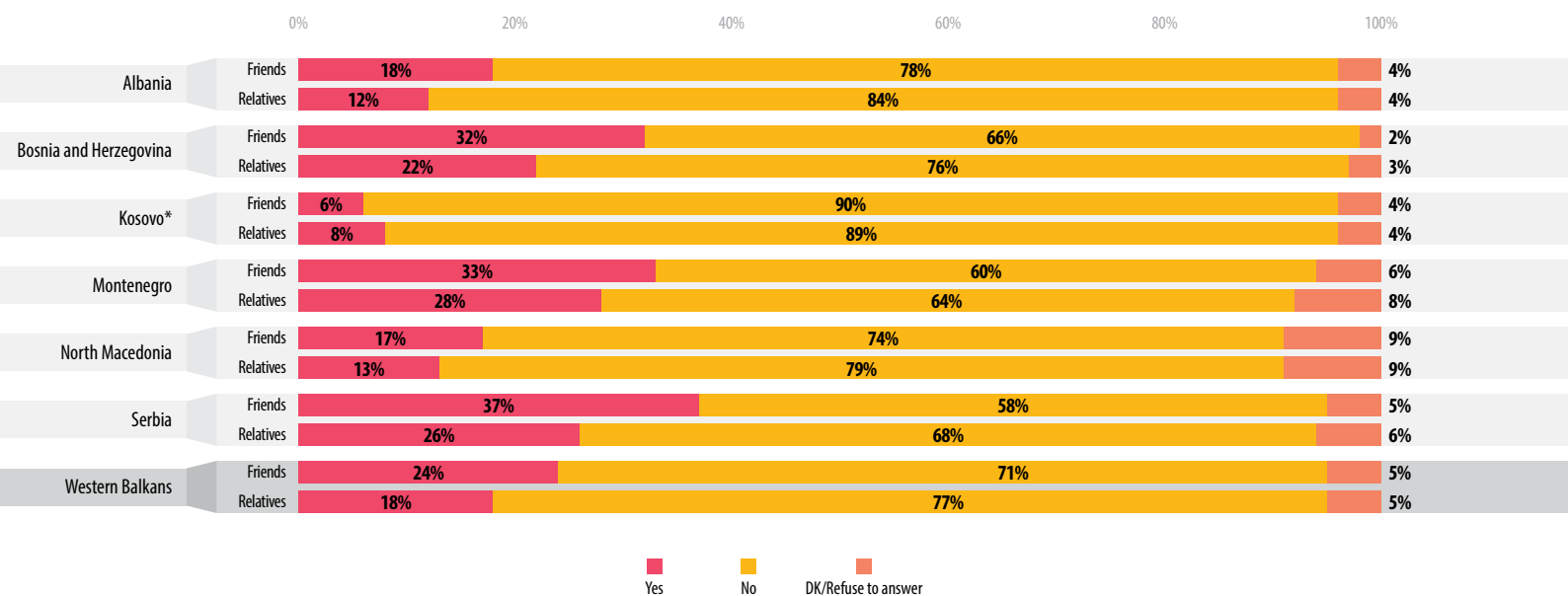
In terms of age group, the largest share of those who disguise their ethnic or religious identity or personal orientation for security reasons are between 18 and 34.

## Experience with Domestic Violence amongst Friends or Relatives

Recognising and addressing domestic violence has become a silent issue over the last two decades. Domestic violence most often happens behind closed doors and evidence shows that it is prevalent in every society and affects individuals of any socioeconomic status, gender, race, religion or nationality. Domestic violence is a major security issue because it affects basic human rights and in most cases it can result in physical injury, psychological trauma, and even death. To respond to the problem, in addition to other measures, all economies of the region have become signatories of the Council of Europe (2011a) Convention on Preventing and Combating Violence Against Women and Domestic Violence (otherwise known as Istanbul Convention)<sup>43</sup> since 2014 and have established mechanisms to undertake measures to respond to the problem and measure their effectiveness. In this respect SecuriMeter has collected data from citizens to measure the level of awareness and information on prevalence of domestic violence since 2022. In this iteration of SecuriMeter citizens were asked to provide information on domestic violence experienced by friends and relatives. **The large majority of nearly two thirds of citizens of the region reported to not have friends or relatives who experienced domestic violence (71% and 77% respectively).** This figure is much higher in Kosovo\* (90% and 89%) and in Albania (78% and 84%), while Serbia, Montenegro, and Bosnia and Herzegovina have the largest share of citizens who responded to have had information on domestic violence experienced by both friends and relatives.

Figure 10. Experience with Domestic Violence amongst Friends or Relatives

10. Do you have friends or relatives who experienced domestic violence?  
(All respondents, N=6004, single answer, share of total, %)



SecuriMeter 2022 found that nearly two thirds of citizens totally agreed or tended to agree that domestic violence presented a security threat for their economy. Despite this, it is worth noting also that due to cultural reasons information about domestic violence is often withheld even in polls which are anonymous. Domestic violence entails a situation in which the offender and the

43 Convention on Preventing and Combating Violence Against Women and Domestic Violence, Council of Europe Treaty Series, No 210, Istanbul, 11 May 2011, <https://rm.coe.int/168008482e>

victim have a close relationship and often people refrain from referring it to third parties. In addition, domestic violence may be manifested in the form of physical or psychological violence and particularly for the latter it is more difficult and challenging to define or share it with other people. This may also explain the big variations in some economies between the SecuriMeter 2022 and SecuriMeter 2024 data. In Kosovo\*, SecuriMeter 2024 data shows a reduction of the percentage of cases the respondents have gotten information about by over five times, while in Serbia the percentage almost doubled compared with SecuriMeter 2022. Furthermore, in this respect it is worth considering the relatively high percentage of citizens who have refused to answer or did not know in North Macedonia and Montenegro (8 to 9 percent).

The economies of the region have made efforts to strengthen their data collection on domestic violence, particularly against women, but gaps in obtaining comprehensive, disaggregated data on various forms of violence still pose a barrier to fully understand the scope and scale of the phenomenon.<sup>44</sup> The reduction in the case of Kosovo\* may be well related to the adoption of the Law on Prevention and Protection from Domestic Violence in August 2023 which revoked the UNMIK Regulation on Protection from Domestic Violence of 2003.<sup>45</sup> The Law provides for a series of administrative and criminal measures aimed at preventing and investigating domestic violence, including the obligation to establish a register for recording cases of domestic violence.

Table 8. Data of SecuriMeter 2022 and SecuriMeter 2024 on information from relatives or other known persons who experienced domestic violence

Year	Western Balkans	Albania	Bosnia and Herzegovina	Kosovo*	Montenegro	North Macedonia	Serbia
2022	40	35	30	70	44	29	33
2024	32	30	54	14	61	30	63

## Satisfaction with Public Security Measures in Each Economy

In the framework of post-conflict, post-authoritarian security sector reform undertaken especially in the last two and half decades, **all economies of the Western Balkans have integrated community policing** as an integral part of policing through laws, strategies and development plans. In contrast to the focus of traditional policing on law enforcement and order maintenance, which has been the traditional dominant approach in the region, community policing emphasizes prevention and community involvement to reduce crime, disorder, and fear and increase legitimacy of law enforcement institutions. As such, measuring public satisfaction with the measures undertaken by law enforcement agencies to prevent crime is an integral part of the implementation of community policing approach. SecuriMeter 2024 has collected data on the level of satisfaction with specific preventive measures such as police presence in the communities, surveillance cameras, and street lightening. **The large majority of citizens (38%) responded that they are completely or mostly satisfied** with the measures undertaken to improve community security, 29% say that they are completely or mostly dissatisfied, while about a third (32%) are neutral. However, it is worth noting that only 7% responded that they are completely satisfied. The highest percentage of citizens who

44 European Institute for Gender Equality. Strengthening data systems on violence against women in the Western Balkans and Türkiye. EIGE 2023. Online: <https://eige.europa.eu/publications-resources/publications/strengthening-data-systems-violence-against-women-western-balkans-and-turkiye>

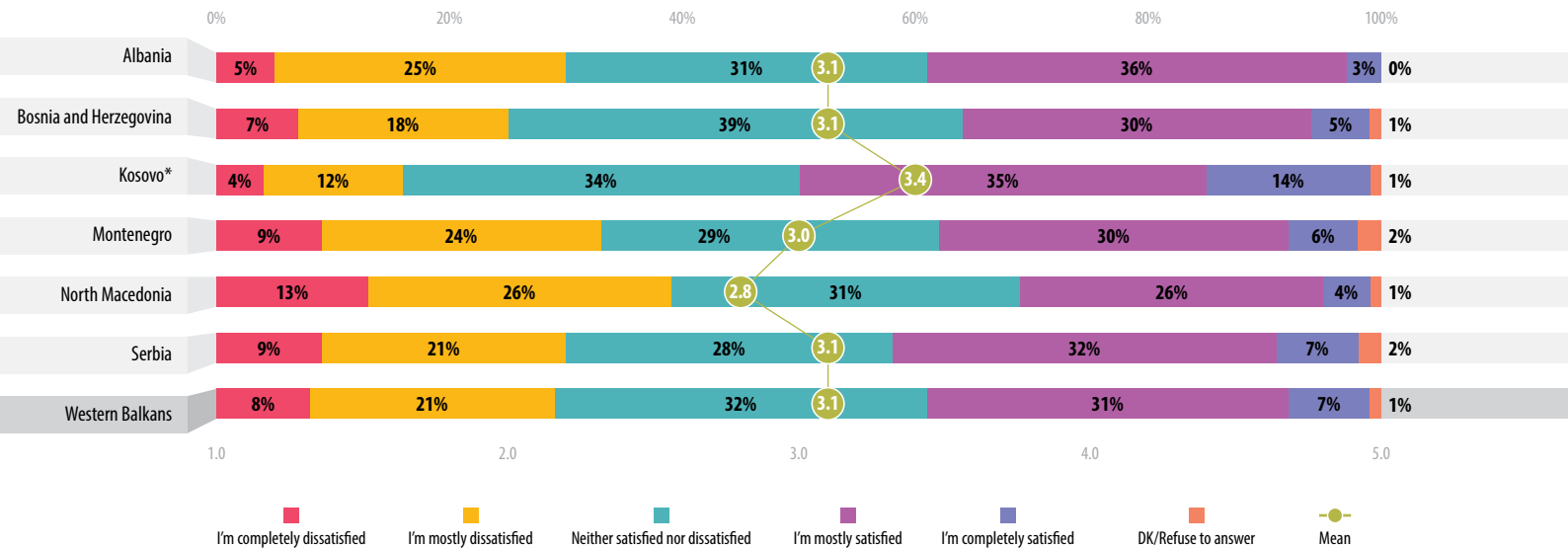
45 Law no. 08/I-185 for the prevention and protection from family violence

are completely dissatisfied is found in North Macedonia (13%), followed by Montenegro (9%) and Serbia (9%), while Kosovo\* has the highest percentage of respondents who report being completely satisfied (14%).

**Figure 11. Satisfaction with Public Security Measures in Each Economy**

11. How satisfied or not are you with your area's public security measures (e.g. regular police patrols, community policing, surveillance cameras, street lighting)?

(All respondents, N=6004, single answer, scale from 1 to 5, share of total, %)



The data shows that despite the results obtained so far with mainstreaming of community policing, all economies of the region need to strengthen their efforts to further improve the performance of law enforcement in this respect. In a similar vein, SecuriMeter 2023 showed that the citizens of the region overwhelmingly agreed that law enforcement agencies in their economies needed to strengthen their performance to fight organised crime and terrorism.

## Conclusion

At the personal level **majority of citizens generally feel very secure**, a larger share compared with the responses on security of the region and security in the respective economies. Within individual economies, Bosnia and Herzegovina and Albania have the lowest share of citizens who feel personally secure.

**Begging in the streets** and **alcohol consumption in the streets** were identified as issues by the majority of respondents. Robberies, drug sales in the streets, domestic violence, or street violence and fights were identified as problematic by a smaller share of respondents, which provides also for an explanation on the high share of responses regarding security at the personal level.

The majority of respondents chooses to not carry much money or not to go out at night for security reasons. However, **a higher share of women chose not to carry much money with them or not to go out at night**, highlighting the gender dimension of security. Despite the small share of respondents in relative terms, it is a major concern that **over one million citizens** have to disguise

their ethnic or religious identity or personal orientation for security reasons, and about **700,000 think that they can feel more secure by carrying a weapon.**

Also, regarding domestic violence, the data need to be interpreted in both percentage and absolute terms. Although the large majority of nearly two thirds of citizens of the region reported to not have friends or relatives who experienced domestic violence, the problem remains serious taking into consideration that in absolute figures **4.1 million citizens** report to have information from friends on **domestic violence** cases and **3.1 million** have obtained such information from relatives. Considering the cultural barriers to communicating these kinds of experiences the figures may be higher. Serbia, Montenegro, and Bosnia and Herzegovina have the highest percentage of citizens who responded to have had information on domestic violence by both friends and relatives.

**Most citizens are generally satisfied** with the measures undertaken by public institutions to improve community security, although **only a small share is completely satisfied.** Despite the progress in mainstreaming community policing the results indicate the need to strengthen community security in all economies.



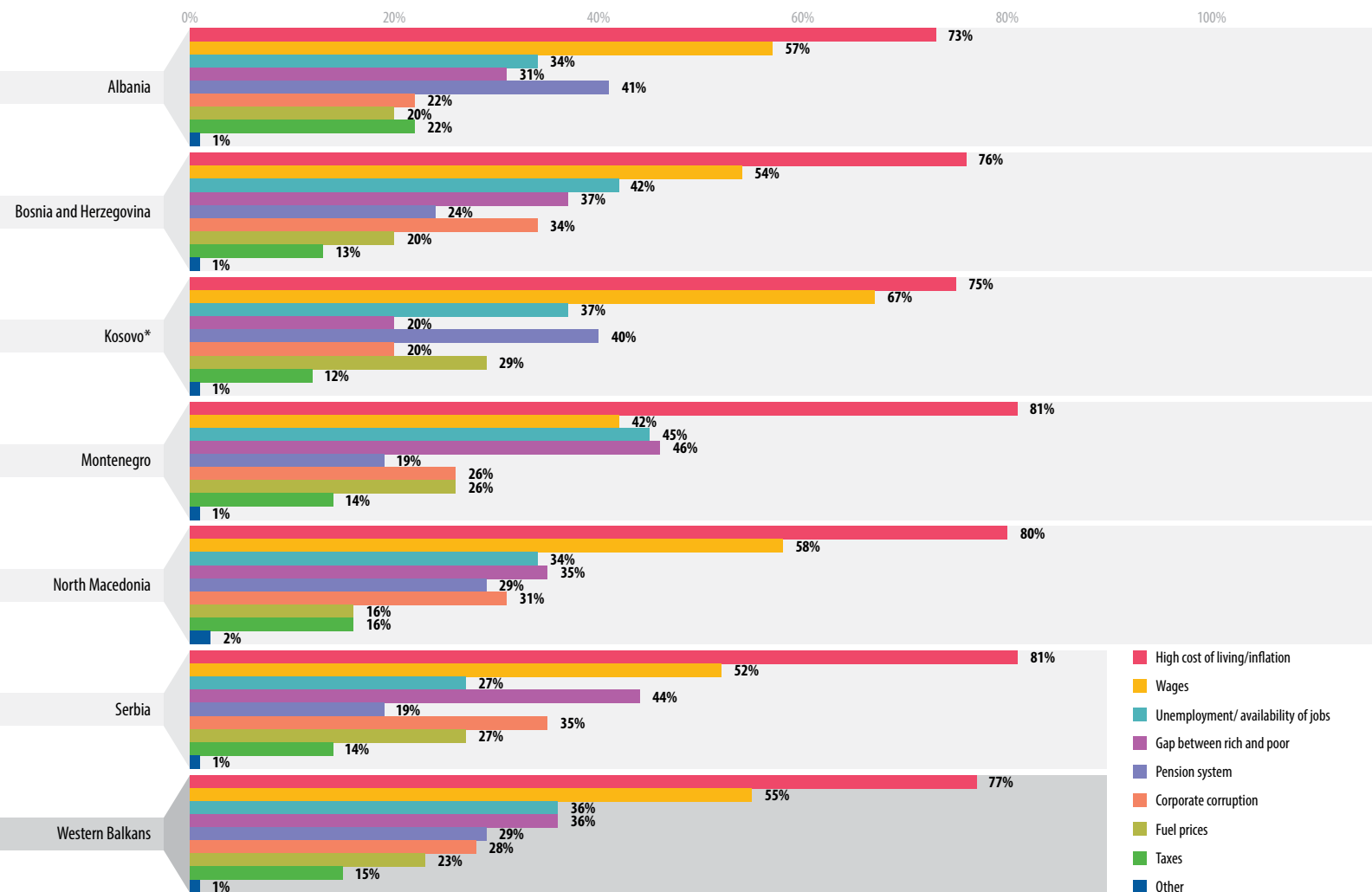
# CHAPTER C: CATEGORIES OF PROBLEMS IN ECONOMY

## The Three Most Important Economic Problems Today

Residents of the Western Balkans are greatly concerned about the high cost of living and inflation, which 77% of people in the region identify as the most critical economic issue, with concerns ranging from 73% in Albania to 81% in Serbia. This worry spans all demographics, including gender, age, education, and ethnicity.

Figure 12. Three Most Important Economic Problems Today

12.1 According to your opinion what are the three (3) most important economic problems facing your economy today?



There is a **widespread concern amongst citizens of the economies of Western Balkans about high cost of living/inflation**. Thus, amongst various issues affecting the economic wellbeing of citizens in the region including wages, taxes, gap between rich and poor, and others, Western Balkan residents in greatest numbers pinpoint high cost of living/inflation as the biggest economic problem facing their economy today (77% as a region, ranging from 73% in Albania to 81% in Serbia.) There are no significant differences on this issue amongst the respondents in the region when taking account of their different gender, age, educational background and ethnicity. Indeed, studies of international organisations reveal that inflation in the region has "surged to levels not seen in multiple decades in many countries due to a strong recovery of demand after the pandemic, supply chain disruptions, and commodity price increases, exacerbated by Russia's war in Ukraine."<sup>46</sup> Moreover, high inflation has severely affected the Western Balkans region, with food and energy prices skyrocketing and eroding the purchasing power of households, where the less well-off consistently face higher inflation rates compared to the better-off due to the variations in goods and services consumed by households of different income levels.<sup>47</sup>

The second most important issue causing problems in the economies of the Western Balkans is wages, i.e. the amount of money that workers receive as payment for their labour or services. This issue is seen as problematic by 55% of Western Balkan residents, fluctuating between 42% in Montenegro to 67% in Kosovo\*. Wages are seen as problematic around the region despite them rising year-on-year in recent times and especially since the end of Covid-19 pandemic.<sup>48</sup> When taking the answers to these two questions, on the importance of wages and inflation, we should clearly surmise that although salaries rise, costs of living rise too and cause the greatest concern amongst Western Balkans. There is space for optimism because while inflation outpaced wages, despite their double-digit growth across the Western Balkans region in 2022, real wages increased in 2023. However, in all economies except Kosovo\*, average wage growth was faster than productivity growth, suggesting that the primary drivers of higher pay related more to minimum wage reforms and labour shortages rather than improved firm-level dynamics.<sup>49</sup>

There are no significant differences on the question of wages amongst the respondents in the region when taking account of their different gender, age, educational background and ethnicity except amongst the older respondents (65+ years). Only 39% of persons aged 65 and older consider wages causing problems in the economy in the Western Balkans. As they approach pension age, it is understandable that they are not much concerned about the level of wages they receive but their pensions. Consequently, this category of people is very concerned about the quality and the reforms of pension system. Namely, if on average just 29% of Western Balkan respondents claim that pension system is causing problems in the economy, 61% in the age group 65+ believe so, clearly confirming that it is not the wages but the level of pensions that they receive/will receive that is of main interest of these residents. Respondents from Kosovo\* and Albania are most con-

46 Minasyan, G., E. Ozturk, M. Pinat, M. Wang, Z. Zhu, 2023. Inflation Dynamics in the Western Balkans. IMF Working Paper no. WP/23/49.

47 Western Balkans Regular Economic Report, Spring 2024, World Bank Group.

48 European Commission (Directorate-General for Economic and Financial Affairs, Directorate D for International Economic and Financial Relations and Global Governance, Unit D1 – Candidate and Pre-Candidate Countries) EU Candidate Countries' & Potential Candidates' Economic Quarterly (CEEQ), 4th Quarter 2023, Technical paper 070 | January 2024.

49 World Bank Group, Western Balkans Regular Economic Report- Invigorating Growth No.25 | Spring 2024, p.1.

cerned about the pension system (40% and 41% claiming it is the most important issue causing problems in the economy).

Western Balkan residents with higher education are less concerned about the pension system. Amongst respondents in the region with no education or with primary school attained some 44% believe that pension system is the most important issue causing problems in the economy. The more educated the residents are the less concerned they are about this issue; hence 29% of those with high school diploma, 24% with a college degree, and 21% with a graduate or PhD degree believe this is a problematic issue in their economy. The survey findings confirm research that shows how higher education levels typically lead to better job opportunities and higher earning.<sup>50</sup>

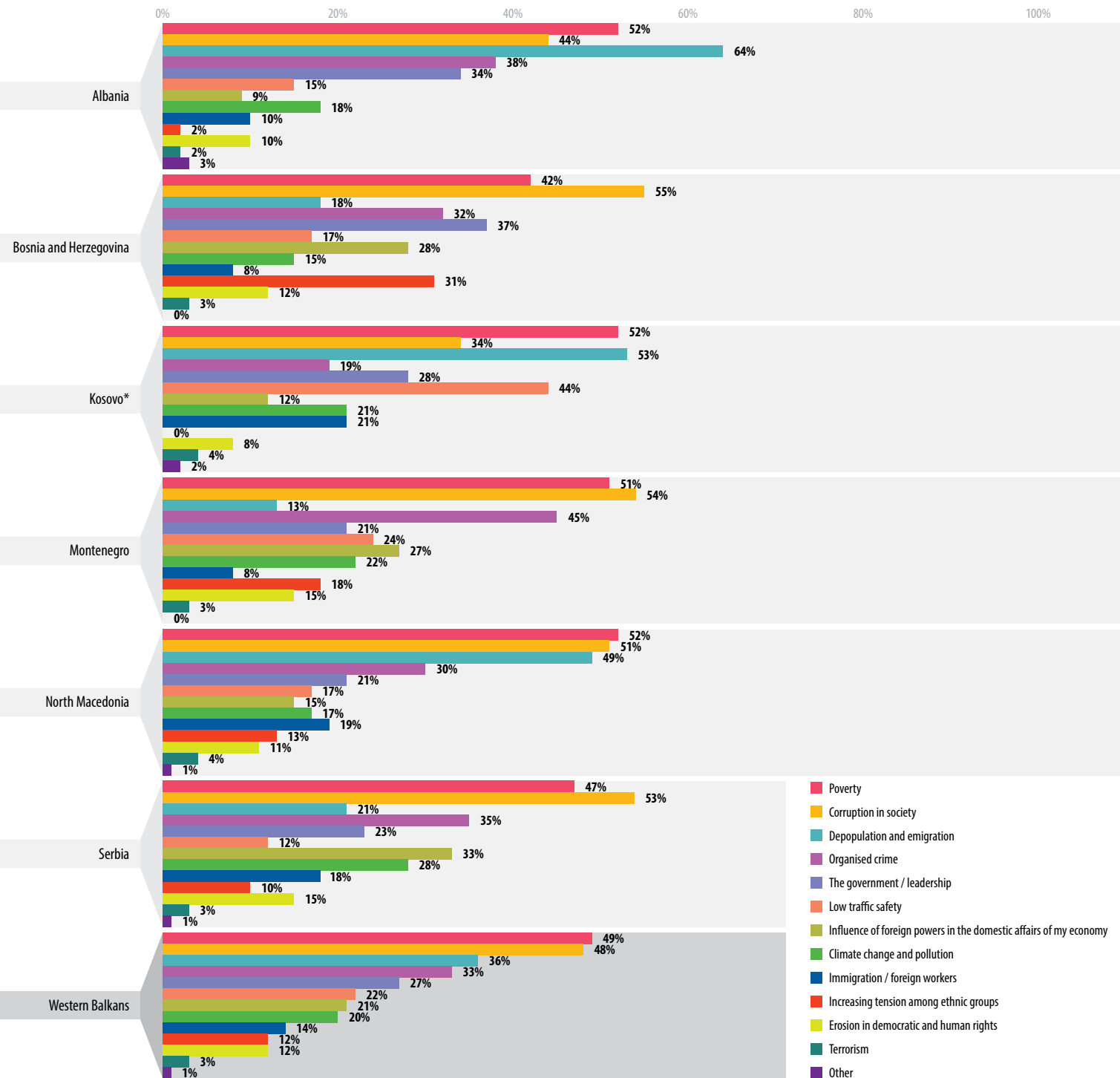
Citizens in the region do not feel the other issues as important in causing problems in their economy with percentages given to various categories of answers ranging from 36% for gap between rich and poor and same for unemployment/availability of jobs to 15% for taxes. Important to note, however, are gender differences in claiming unemployment and fuel prices to be most important issues causing problems in the economy in the Western Balkans. Namely, amongst respondents that worry about unemployment as a problem in the region, women feel this is an issue more than men (41-32%), while men worry more about the issue of fuel prices than women (29%-17%). These feelings are understandable as there is a gender inequality in the region and men tend to own more automobiles than women. Studies show how "the activity rate for women in the labour market is only 53% while for men the figure is as high as 73%." (UNDP 2022) Few women are top managers in companies and, although in recent years more of them are parliamentary members or ministers and their share in high management positions in public administration has risen to EU levels, there is much space for progress for Western Balkan economies on this issue.

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50 Javier Olivera, "The distribution of pension wealth in Europe," in *The Journal of the Economics of Ageing*, Volume 13, 2019, Pages 30-42.

Figure 13. Top 3 Non-Economic Problems Today in Western Balkan economies

12.2 According to your opinion what are the three (3) most important non-economic problems facing your economy today?



Western Balkan residents feel that poverty (49%) and corruption (48%) are the most important non-economic problems facing their economy today, significantly more than other issues. Concerns about poverty are a least worry for respondents from BiH (42% of respondents see it as one of the most important non-economic problems facing their economy today) and respondents

from Serbia (47%) where amongst residents of other Western Balkan economies the percentages are 51-52%. Older respondents, aged 65 or older, are more concerned about this issue than the young, 18-24 years old, (55%-46%). The more educated the residents are the less concerned they are about this issue; hence 56% of those with no education/primary school, 50% with high school diploma, 46% with a college degree, and 46% with a master's or PhD degree believe this is a problematic issue in their economy. As education is a clear indicator for success in life, understandably there is a 56-46% difference in worries between the least and most educated on the issue of poverty. While females are slightly more concerned (52-47%) amongst the most concerned respondents about poverty are from North Macedonia with 53%, from Montenegro 52%, Albania also 52%. Least concerned respondents about poverty are from BiH with 40%.

As far as the second most important non-economic problem facing their economy today in the Western Balkans is concerned, "Corruption in society", respondents from Kosovo\* are outliers as only 34% of residents believe this is an issue compared to, for example, 44% in Albania or 54% in Montenegro and 55% in Bosnia and Herzegovina. Respondents from Albania hold vastly different views on corruption in society than other economies in the region as they think this is less of an issue for their economies compared to others. Thus, while 39% from Albania believe this is an issue, the majority of respondents from North Macedonia 57% and Montenegro with 58% feel this is an important problem. About half of the Roma (48%) in the region think the same. The more educated a person is the more they believe that corruption in society is a problem. Namely, 38% of those with no education/primary school, 49% with high school diploma, 51% with a college degree, some 53% with a master's or PhD degree believe this is a problematic issue in their economy. While different genders hold similar beliefs on the issue, the youngest (18-24 years old) are least concerned about corruption in comparison with older persons. The survey confirms recent international studies that have shown that corruption impedes many of the positive effects of education with regard to politics, and that "when corruption is high, educated and politically sophisticated citizens are as likely as low-educated citizens to feel resignation with regard to formal political institutions. This, in turn, is likely to affect patterns of political participation amongst these citizens."<sup>51</sup> Highly educated persons are particularly affected when institutions are weak and corruption thrives.

Amongst other issues, a strong discrepancy can be observed amongst those who believe that depopulation and emigration are the most important non-economic problems facing their economy today. Namely, while the regional average is 36% of respondents who claim this is a problematic issue, the percentage of respondents who believe so in Bosnia and Herzegovina, Montenegro and Serbia (18%, 13%, 21%, respectively) is very much lower than those in Albania, Kosovo\* and North Macedonia (64%, 53%, 49%, respectively). The higher level of concern in Albania is understandable. Since the 1990s, emigration from Albania has been characterised by different waves of large-scale outflows with substantial emigrant population. Emigration from the Western Balkans is significant when comparing the number of emigrants from the WB to the total population born in the respective origin economies. Albania has the highest emigration rate at 28%, followed by Kosovo\* (22%), Bosnia and Herzegovina (20%), and North Macedonia (18%). The emigration rates for Serbia and Montenegro are slightly lower but still significant, at 10% and 9% respectively.<sup>52</sup>

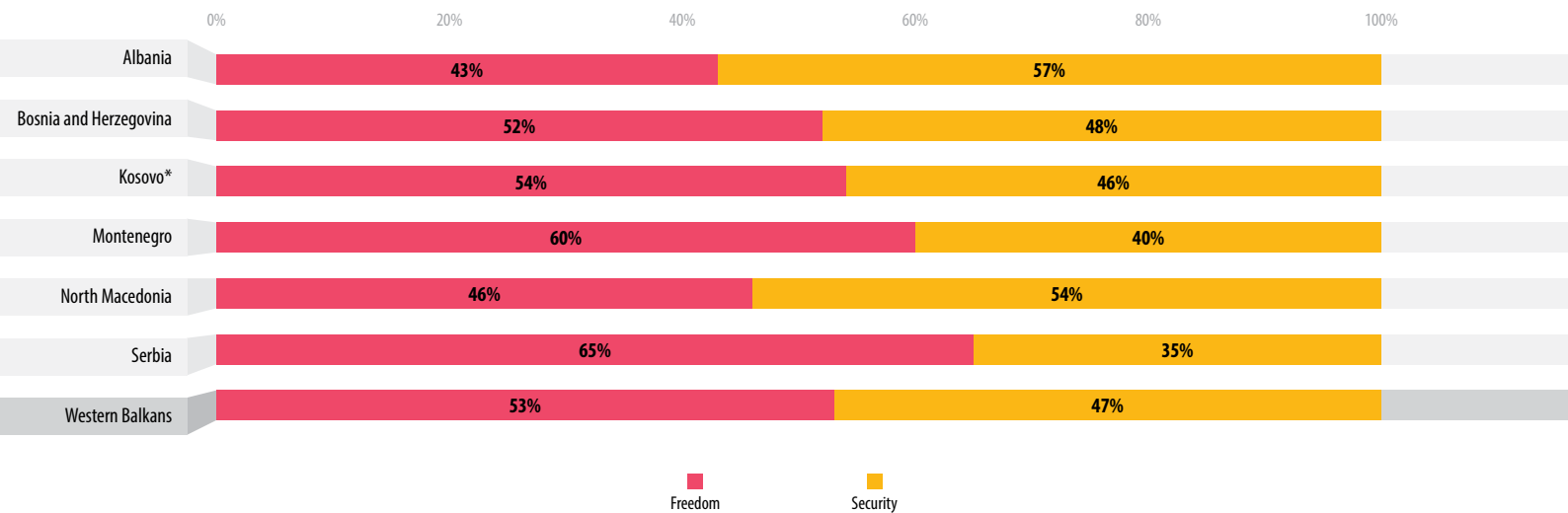
51 Agerberg, M. The Curse of Knowledge? Education, Corruption, and Politics. *Polit Behav* 41, 369-399 (2019). [https://www.researchgate.net/publication/323787795\\_The\\_Curse\\_of\\_Knowledge\\_Education\\_Corruption\\_and\\_Politics](https://www.researchgate.net/publication/323787795_The_Curse_of_Knowledge_Education_Corruption_and_Politics)

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

On the issue of organised crime being a problem, respondents from Kosovo\* are much less worried than the Western Balkans average (19% compared to 33%). The more educated a person is the more concerned about organised crime they are; hence 21% of those with no education/primary school, 34% with high school diploma, 36% with a college degree, and some 37% with a master's or PhD degree believe this is a problematic issue in their economy. As far as the issue of influence of foreign powers in the domestic affairs of the economy is concerned, residents in economies with strong ethnic Albanian presence (Albania, Kosovo\*, North Macedonia) are much less worried about the issue (9%, 12%, 15%, respectively) than residents of the other economies (Bosnia and Herzegovina, Montenegro and Serbia) who are more concerned (28%, 27%, 33%, respectively). These attitudes in Albania, Kosovo\* and North Macedonia correlate with the high level of trust in the European Union and NATO. (Question 34) Similarly, there is much lower level of trust in EU and NATO amongst the respondents in Bosnia and Herzegovina, Montenegro and Serbia. Furthermore, residents of Bosnia and Herzegovina and Montenegro (31%, 18%, respectively) see "increasing tension amongst ethnic groups" as the most important non-economic problem facing their economy today much more than the other economies with respondents from Kosovo\* and Albania least worried (0% and 2% respectively). A peculiarity, low traffic safety is a big issue amongst respondents in Kosovo\*, where 44% believe that this is the most important non-economic problem facing their economy today, twice more compared to the regional average of 22%. Data from the Western Balkans Road Safety Observatory does not confirm the sentiment in Kosovo\* as fatal traffic accidents in this economy are not outstanding in the region.<sup>53</sup>

**Figure 14. Freedom vs. Security: Which is More Important?**

13. Most people consider both freedom and security to be important, but if you had to choose between them, which one would you consider more important?



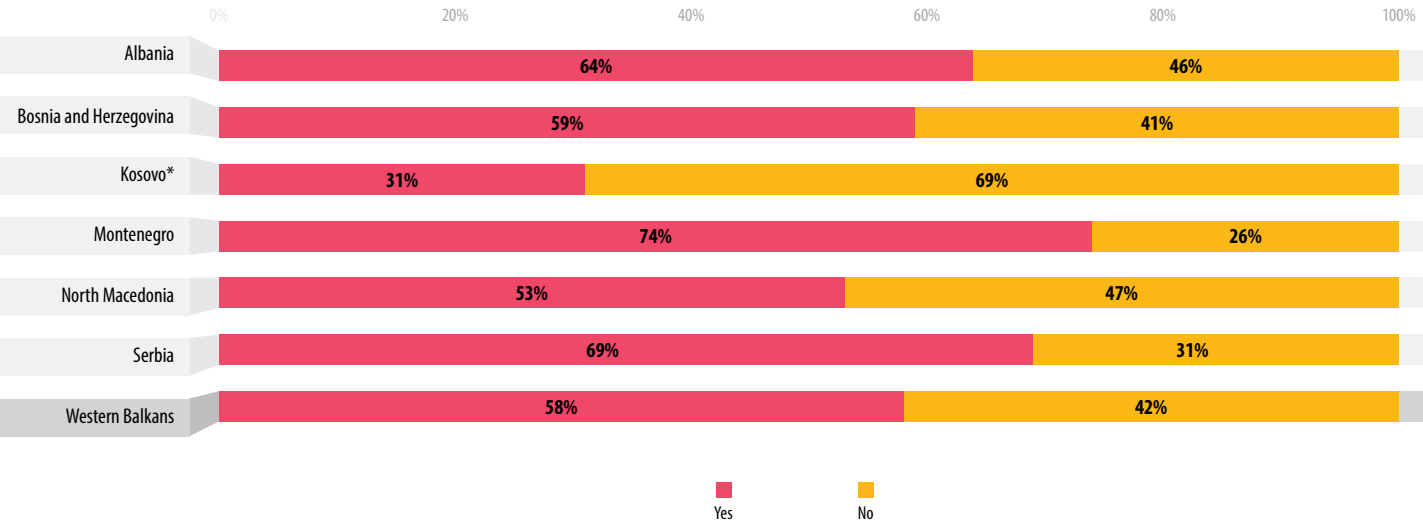
When asked to choose between freedom and security residents of the region consider freedom slightly more important (53-47%). However, Citizens from Albania and citizens of North Macedonia prefer security (57% and 54% respectively) with the residents of other economies preferring freedom, the most in Montenegro and Serbia (60% and 65% respectively). While regionally there is an even split in the preference between freedom and security amongst females, men prefer freedom (57-43%). Amongst the least educated and the oldest category of persons in the region there

<sup>53</sup> The Western Balkans Road Safety Observatory (WBRSO), Road Safety Statistics: Number of Fatalities for 2023, WBRSO 2024.

is a clear preference for security while for all other age and education groups there is a preference for freedom.

**Figure 15. Organised Crime and Terrorism in Your Economy**

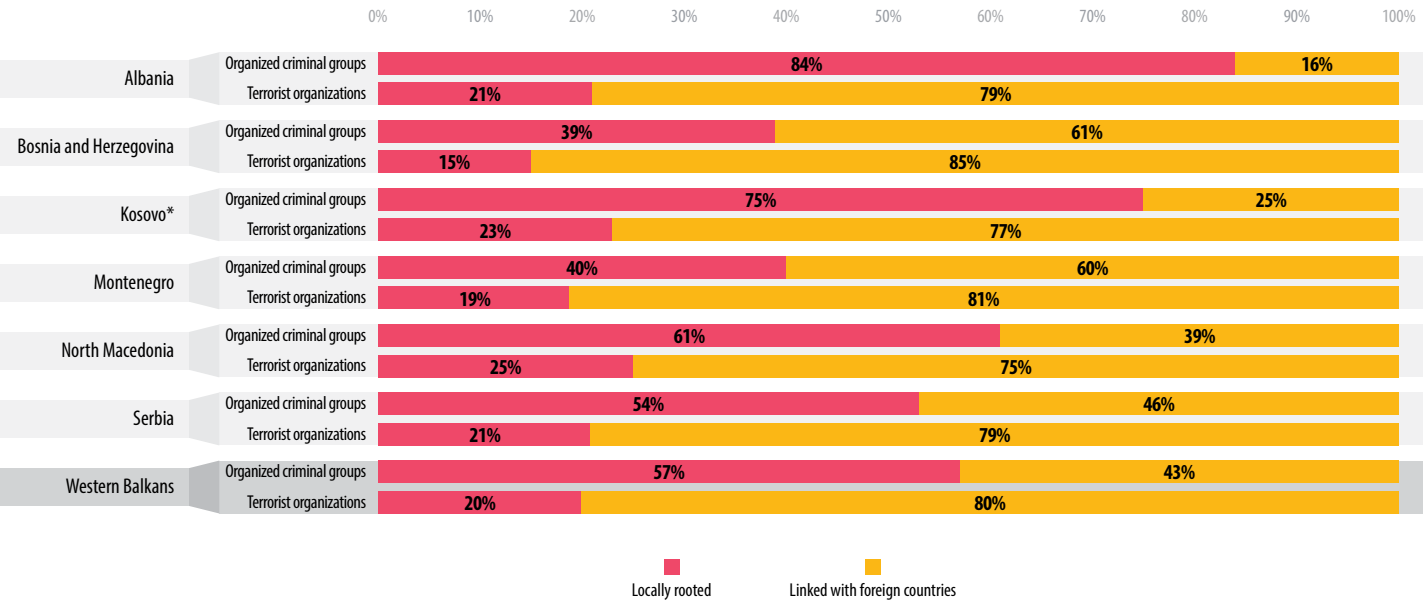
14. Do you agree that your [ECONOMY] suffers from organised criminals and terrorist organisations?



Residents of Western Balkans, except Kosovo\*, in strong majorities believe that their economy suffers from organised criminals and terrorist organisations. The less educated a person is the less they agree that their economy suffers from organised criminals and terrorist organisations; hence 43% of those with no education/primary school, 59% with high school diploma, 62% with a college degree, and 63% with a master's or PhD degree agree with the statement. When comparing residents' responses to this question and the responses to the question number 12.2 on what are the three (3) most important non-economic problems facing your economy today, an interesting observation can be made. While bigger percentage of more educated than less educated persons believe organised crime is a problematic issue in their economy (the discrepancy being highest amongst the most and least educated ones, so that 37% of educated persons with master's or PhD claim it is one of the three most important non-economic problems facing their economy today compared to 21% of non-educated who believe the same) the more educated persons also claim that their economy suffers from organised criminals and terrorist organisations more than non-educated persons do. (Questions 12.2 and 14) The educated persons see organised crime as a potentially greater problematic issue and think their economy suffers from it to the extent less than educated persons believe. Conversely, less educated persons do not believe that the economy already suffers from organised crime and do not see the issue as one of the three most important non-economic problems facing their economy today. In essence, those more educated see organised crime as prevalent and potentially significant problem unlike the less educated who do not see the issue as quite a prevalent and that important problem. Respondents from Albania (45%) believe least that their economy suffers from organised criminals and terrorist organisations and, from Montenegro the most (76%).

**Figure 16. Are Organised Crime and Terror Groups Locally-Rooted or Foreign-Linked?**

15. Do you consider that the members of organised criminal groups and terrorist organisations which may be present in your economy are locally-rooted or linked with foreign economies?  
 (Respondents with answer "Yes" at Q14. Do you agree that your economy suffers from organised criminals and terrorist organisations? N=3507, single answer, share of total, %)



A majority of Western Balkan residents (57%) consider the members of organised criminal groups which may be present in their economy locally-rooted. However, in Bosnia and Herzegovina and Montenegro respondents claim that these members are in majority linked with foreign economies (39% and 40% respectively). The less educated a person is in the Western Balkans the more likely it is that they responded that the criminal members are locally-based. Thus, 63% of those with no education/primary school, 57% with high school diploma, 56% with a college degree, and some 55% with a master's or PhD degree believe that the organised criminal groups are locally-rooted. As far as the members of terrorist organisations are concerned, a majority of Western Balkan residents (80%) consider these people being linked with foreign economies. There is a belief in the Western Balkans that crime is locally-rooted while terrorism is linked with foreign elements.

Residents of Western Balkans seem not to associate criminal networks with terrorist cells and activities. Contrary to respondents in the Western Balkans, EU and other reports have stated that Balkan crime lords cooperate internationally. Although it might be locally-rooted, Western Balkans organised crime is also a network internationally.<sup>54</sup> Moreover, organised crime networks have been linking with terrorist grouping internationally. There is cooperation between organised crime and terrorists or violent extremists, with the former providing criminal services to the latter. Such criminal services "largely refer to criminals supplying weapons and explosives or fraudulent documents that facilitate the travel of terrorists" and "links between migrant smuggling and terrorism similarly concern the use of the migrant smuggling facilitation services by terrorists in order to travel un-

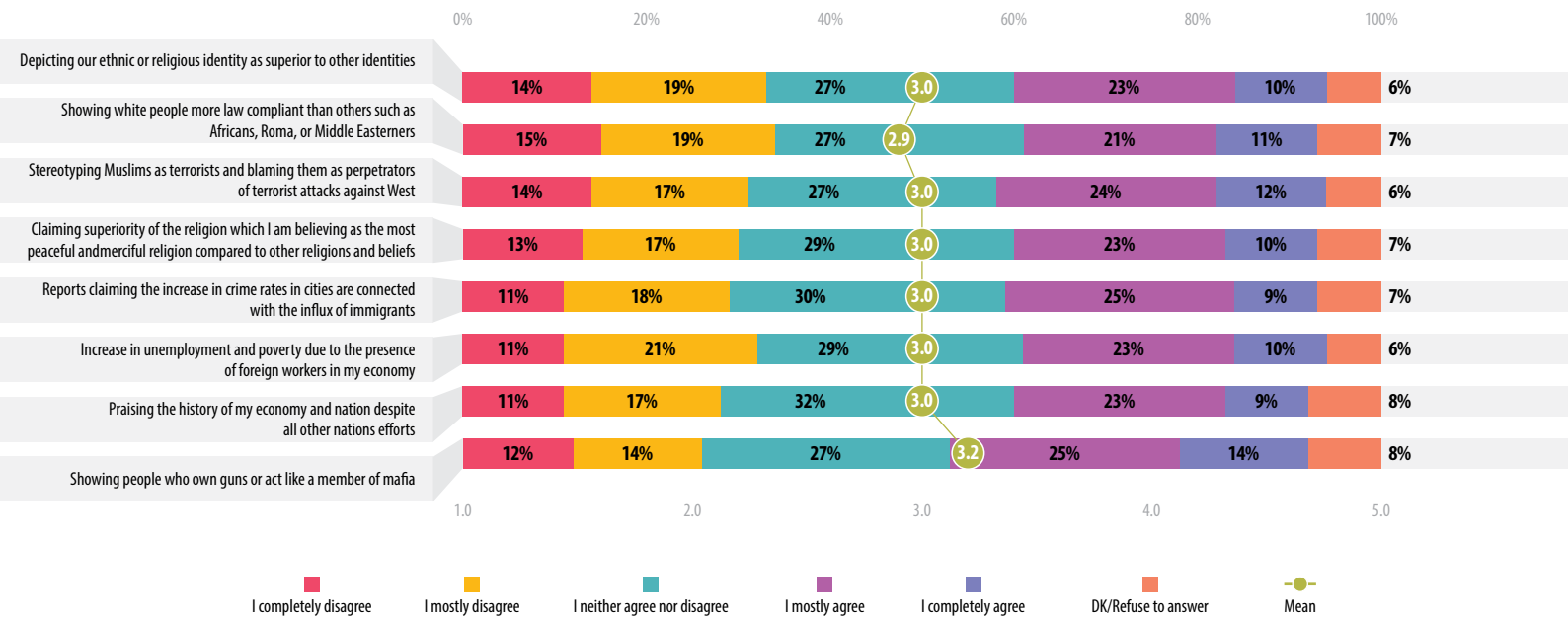
54 Europol, "Balkans' biggest drug lords arrested after investigation into encrypted phones," 12 May, 2023; Europol, "Major bust of a notorious narcotics clan in Spain and Portugal," 22 December, 2023b; Europol, "566 arrests in week of coordinated actions in Southern Europe," 30 November, 2023c; Europol, European Union Terrorism Situation and Trend Report, Publications Office of the European Union, Luxembourg, October 2023d; Europol, "Properties worth EUR 48 million frozen after cocaine sweep in Ecuador and Spain," 16 February 2024b; Europol, "Nine members of high-risk drug trafficking organisations arrested in Montenegro," 18 July 2024.



detected.<sup>55</sup> Other connections between organised crime and terrorism have also been noted in international reports. Despite beliefs of respondents from the region, Western Balkans organised crime groups collaborate internationally and could potentially collude with terrorist networks.

**Figure 17. Potential Online Radicalisation of Youth in the Western Balkans**

16. On a scale from 1 to 5, where 1 means "I completely disagree" and 5 means "I completely agree", to what extent do you agree or disagree that the videos or other types of online visuals and materials with the following message may radicalise your children and young relatives and their friends in the online sphere? – Results for the Western Balkans region



Western Balkan residents have diverging opinions on what kind of messages in videos or other types of online visuals and materials may radicalise their children and their relatives and friends in the online sphere. Results for the Western Balkans region are evenly balanced; respondents in almost exact percentages agree and disagree that any of the given statements contributes to radicalising their children and young relatives and their friends in the online sphere. Only for one of these propositions/messages the percentage of those who agreed was 5% more than of those who disagreed. Namely, some 39% of Western Balkan respondents completely and mostly agreed, while 26% completely and mostly disagreed that "Showing people who own guns or act like a member of mafia" in videos or other types of online visuals and materials may radicalise their children and young relatives and their friends in the online sphere. Although a plurality, this view is not a majority as beyond these 26% who did not agree, some 27% were neutral, neither agreeing or disagreeing.

Economy-wise there are diverging views on the effects of various messages. On the effects of all but one message, Albanian respondents agree more than they disagree that messages shown in videos or other types of online visuals and materials may radicalise their children and young relatives and their friends in the online sphere. Opposite to respondents from Albania, the ones from Kosovo\* disagreed more than they agreed that any of the messages can have such effect. Other

55 Europol, European Union Terrorism Situation and Trend Report, Publications Office of the European Union, Luxembourg, October 2023d.

economies had more balanced responses, with a few questions being answered with higher percentage of agreement. In general, majority of Western Balkan respondents very rarely answered that the set of messages had effects on radicalisation of youth. Thus, only in one economy did a majority of respondents (more than 50%) agree on one question that the message is effective in radicalising their children and young relatives and their friends in the online sphere. (Albania on the message: Stereotyping Muslims as terrorists and blaming them as perpetrators of terrorist attacks against the West)

We took 40% agreement as a baseline to see if any of the messages were conceived as somewhat effective in radicalisation of youth. More than 40% of respondents from Albania agreed that the following messages could radicalise youth: Depicting our ethnic or religious identity as superior (42% agreed, 9% more than disagreed); showing white people more law compliant than others such as Africans, Roma or Middle Easterners (45% and 14%); stereotyping Muslims as terrorists and blaming them as perpetrators of terrorist attacks against the West (51% and 23%); reports claiming the increase in crime rates in cities are connected with the influx of immigrants (41% and 11%); showing people who own guns or act like a member of mafia (50% and 25%). Furthermore, more than 40% of respondents from North Macedonia agreed that the following messages could radicalise youth: stereotyping Muslims as terrorists and blaming them as perpetrators of terrorist attacks against the West (43% and 16%); and increase in unemployment and poverty due to the presence of foreign workers in my economy (41% and 13%). Amongst other economies, more than 40% of interviewees from Bosnia and Herzegovina agreed that the following messages could radicalise youth: showing people who own guns or act like a member of mafia (43% and 21%), similarly as interviewees from Serbia regarding the same message (41% and 12%). The biggest percentage of interviewees from Montenegro that agreed on any of the questions in this set was 34%, and 29% for Kosovo\* interviewees.

Table 9. Effects of different messages on different economies in online radicalisation

Depicting our ethnic or religious identity as superior	Agree (completely and mostly)	Neither agreed or disagreed	Disagree (completely and mostly)	Agree minus disagree
Albania	42	15	33	9
Bosnia and Herzegovina	30	34	32	-2
Kosovo*	28	32	35	-7
Montenegro	29	29	34	-5
North Macedonia	34	27	31	3
Serbia	36	26	33	3

Showing white people more law compliant than others such as Africans, Roma or Middle Easterners	Agree (completely and mostly)	Neither agreed or disagreed	Disagree (completely and mostly)	Agree minus disagree
Albania	45	16	31	14
Bosnia and Herzegovina	34	30	33	1
Kosovo*	22	38	34	-12
Montenegro	26	28	38	-12
North Macedonia	35	24	33	2
Serbia	34	24	36	-2

Stereotyping Muslims as terrorists and blaming them as perpetrators of terrorist attacks against the West	Agree (completely and mostly)	Neither agreed or disagreed	Disagree (completely and mostly)	Agree minus disagree
Albania	51	16	28	23
Bosnia and Herzegovina	36	30	29	7
Kosovo*	27	33	32	-5
Montenegro	28	30	34	-6
North Macedonia	43	24	27	16
Serbia	33	27	32	1

Claiming superiority of the religion which I am a follower as the most peaceful and merciful religion compared to other religions and beliefs	Agree (completely and mostly)	Neither agreed or disagreed	Disagree (completely and mostly)	Agree minus disagree
Albania	38	20	34	4
Bosnia and Herzegovina	37	37	20	17
Kosovo*	25	29	39	-14
Montenegro	33	31	29	4
North Macedonia	32	30	30	2
Serbia	36	29	30	6

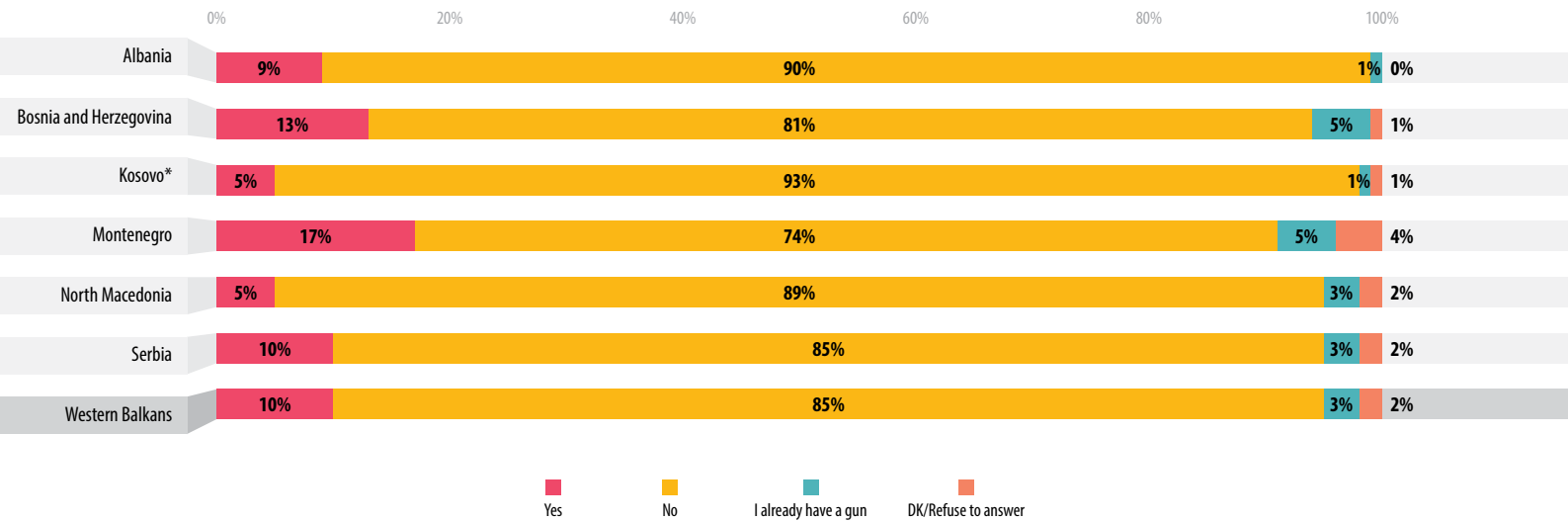
Reports claiming the increase in crime rates in cities are connected with the influx of immigrants	Agree (completely and mostly)	Neither agreed or disagreed	Disagree (completely and mostly)	Agree minus disagree
Albania	41	22	31	11
Bosnia and Herzegovina	35	35	25	10
Kosovo*	24	36	33	-9
Montenegro	32	31	30	2
North Macedonia	38	29	27	9
Serbia	35	28	33	2

Increase in unemployment and poverty due to the presence of foreign workers in my economy	Agree (completely and mostly)	Neither agreed or disagreed	Disagree (completely and mostly)	Agree minus disagree
Albania	35	23	34	1
Bosnia and Herzegovina	33	30	34	-1
Kosovo*	25	34	35	-10
Montenegro	31	31	31	0
North Macedonia	41	25	28	13
Serbia	35	28	33	2

Praising the history of my economy and nation despite all other nations' efforts	Agree (completely and mostly)	Neither agreed or disagreed	Disagree (completely and mostly)	Agree minus disagree
Albania	26	22	36	-10
Bosnia and Herzegovina	31	44	20	11
Kosovo*	29	29	35	-6
Montenegro	28	36	27	1
North Macedonia	35	29	29	6
Serbia	37	31	25	12

Showing people who own guns or act like a member of mafia	Agree (completely and mostly)	Neither agreed or disagreed	Disagree (completely and mostly)	Agree minus disagree
Albania	50	16	25	25
Bosnia and Herzegovina	43	30	22	21
Kosovo*	26	39	28	-2
Montenegro	34	30	28	6
North Macedonia	39	26	28	11
Serbia	41	24	29	12

**Figure 18. Interest of Citizens in Gun Ownership**  
17. Would you consider owning a gun?



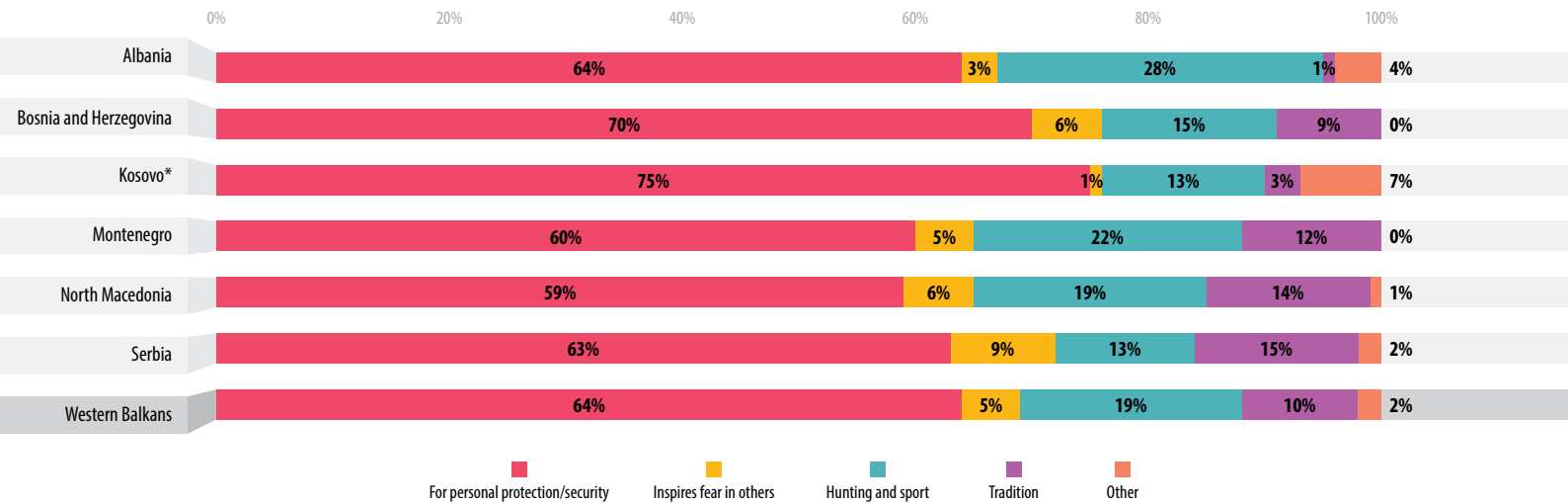
A vast majority of Western Balkan respondents would not consider owning a gun, the percentages ranging from 93% in Kosovo\* and 89% in North Macedonia to 81% in Bosnia and Herzegovina. The results of the survey in 2024 do not much differ from those in 2023. 'No' as an answer to owning a gun has increased from 81% to 85% in the region as a whole, most prominently in Bosnia and Herzegovina, from 75% in 2023 to 81% in 2024; Serbia from 77% in 2023 to 85% in 2024; and Kosovo\* from 77 to 93%. Minimal differences in opinion were registered in other three economies of the region. Similar to the survey results for the Western Balkans, data on gun ownership reveals that 90% of EU citizens had never owned a gun.<sup>56</sup>

56 Flash Eurobarometer 383, Firearms in the European Union, Conducted by TNS Political & Social at the request of the European Commission, Directorate-General for Home Affairs, Brussels, 2014.

Figure 19. Reasons for Gun Ownership

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

(Respondents with answer "Yes" and "I already have a gun" at Q17, N=759, single answer, share of total, %)



Amongst those who consider owning a gun, or already own one, the main reason to do so is for protection/safety. Majority of Western Balkan respondents owning or considering to own a gun have given this reason, from North Macedonia where 59% responded so to Kosovo\* where 75% did so. Compared to 2023, more people who consider owning a gun, or already own one, state that the main reason to do so is for protection/safety, from 60% in 2023 to 64% in 2024 for the Western Balkans as a whole. A big increase in this opinion occurred in Albania - from 55% in 2023 to 64% in 2024. The biggest change is in Kosovo\* where the increase is from 40% in 2023 to 75% in 2024. Amongst those who did own a firearm at the time of the EU survey, or who used to own one, over a third (35%) reported hunting as the reason for being armed; but only 14% said it was for personal protection (14%). Although EU data is much older, the discrepancy is significant, indicating much less safety concerns and need for owning personal weapon for protection in the EU than in the region. Conversely, we could argue that residents of the Western Balkans feel that there are low levels of security. In the US however, the percentages are similar to the region, as according to the US-based Pew Research Centre, protection tops the list of reasons given for owning a firearm with 67% of gun owners saying so. Hunting (38%), sport shooting (30%) and gun collecting (13%) came next.<sup>57</sup> The laws on gun ownership in the US are far more liberal compared to legislation in the region.

In 2023 in Kosovo\*, 43% of those who consider owning a gun, or already own one, claimed the main reason to so was hunting and sport. This has dropped to 13% in 2024. Since there have been no changes to the Kosovo\* Law No. 03/L-143 on Weapons, and Law No. 05/L-134 on Legalisation and Surrender of Weapons, Ammunition, and Explosive Devices, there are no rational reasons why these changes in respondents' perceptions have occurred in such a drastic fashion. In Serbia, there was a decrease of those who stated that the main reason to consider owning or already owning a gun is for protection/safety from 69% in 2023 to 63% in 2024. Instead, an increase in the reason of "tradition" from 7% in 2023 to 15% in 2024 occurred. A small decrease also occurred in North Macedonia, from 64% in 2023 to 59% in 2024, with rise in another category, "hunting and sport." In Bosnia and Herzegovina and Montenegro there were minimal changes in this category.

57 Katherine Schaeffer, "Key facts about Americans and guns," Pew Research Centre, July 24, 2024

# CHAPTER D: MIGRATION

Public opinion data regarding immigration in the Western Balkans reveals a complex and multi-faceted picture. Although a clear majority across the region acknowledges the potential economic benefits of immigration, particularly in addressing labour shortages, this openness is coupled with a strong preference for controlled and regulated migration flows.

While there are no significant changes or shifts of opinions compared to last year's data, it should be noted that the Western Balkans continues to be mainly a transit route for illegal migrants to reach the EU member states, rather than their preferred final destination.

According to UNCHR data<sup>58</sup>, a total of only 1279 asylum applications were lodged in the Western Balkan economies during 2023, with the highest number (602) registered in North Macedonia, and the lowest (9) in Albania. Syria, Russian Federation, Congo, Afghanistan and Turkiye were the top 5 countries of origin of asylum seekers.

A similar trend has continued in 2024<sup>59</sup>, with 644 applications lodged insofar, peaking 150 in North Macedonia, and only 12 in Albania. Syria, Russian Federation, Turkiye, Morocco and State of Palestine are the top five countries of origin of asylum seekers for 2024, the majority of whom being men (51%) and young boys (11%).

Additionally, in the first six months of 2024, the region experienced a sharp drop of illegal immigrants passing through the Western Balkan route to the EU by 72%<sup>60</sup>, in contrast with the West African and the Eastern Land Border which saw the largest increases with +174% and 148% respectively.

Citizens of the region generally support welcoming immigrants to fill job vacancies, but prefer a managed approach with limits tied to specific labour needs. There is reluctance towards liberalising visa regimes with economies experiencing high outward migration, suggesting concerns about potential large-scale inflows as well as about integration and security.

Indeed, data from individual economies of the Western Balkans suggest that labour needs are mostly met through managed migrant "imports" rather than those who enter the Western Balkan route through irregular crossings.

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58 UNHCR – Western Balkans. Online: <https://app.powerbi.com/>

59 UNHCR – Western Balkans. Online: <https://app.powerbi.com/>

60 <https://www.frontex.europa.eu/media-centre/news/news-release/eu-external-borders-irregular-border-crossings-fall-one-third-in-the-first-half-of-2024-ALAcOn#:~:text=The%20number%20of%20irregular%20border,preliminary%20data%20collected%20by%20Frontex>

In 2023, the National Employment Service branches in Serbia issued a total of 50,397 work permits to foreign nationals, the majority of whom were citizens from Russia (with a notable 19,645 permits), followed by China, Turkiye, India, and Nepal<sup>61</sup>.

The Employment Agency (AV) of North Macedonia issued 5,676 work permits and personal work permits for foreigners during 2023, the majority being granted to citizens of Turkiye, Kosovo\*, Serbia, and Albania<sup>62</sup>.

The Service for Foreigner's Affairs in Bosnia and Hercegovina revealed that 3,058 work permits were granted to foreign nationals in 2023, whose primary countries of origin were Turkiye, Serbia, India, China, and Nepal, with the most significant numbers being from Turkiye and Serbia<sup>63</sup>.

Similarly, Kosovo\* issued over 3,600 work permits for foreign citizens in 2023, mainly originating from Turkiye and Bangladesh, but also from Serbia and Albania<sup>64</sup>.

Montenegro presents a different picture, with more than 96,000 foreign citizens with temporary and permanent residence permits registered in 2023. Russians comprise the largest community, with more than 26,000 citizens, interestingly followed by 9,752 Ukrainian citizens, most of whom have received 12-month "temporary protection", and 9,110 citizens of Turkiye<sup>65</sup>.

A total of 9,825 foreigners were granted work permits and work certificates in Albania during 2023, according to the National Agency for Employment and Skills. Citizens of Turkiye and Bangladesh lead the employment of foreigner workers in Albania followed by Nepal, India and Italy<sup>66</sup>.

Migration trends in the European Union clearly indicate that illegal migrants seek to reach the EU member states rather than settle in the Western Balkan economies. The European Union Asylum Agency reports that in 2023, 1.1 million applications were lodged in the EU+, marking an 18% increase from the previous year, and the most in seven years. During the first half of 2024, some 513,000 applications were lodged in the EU+, foreseeing again over a million applications for asylum by the end of 2024<sup>67</sup>.

Syrians consistently remain the largest group of asylum seekers, followed by Afghans as the second largest nationality group, and Turkish nationals suddenly seeking asylum in unprecedented numbers.

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61 [https://welcometoserbia.org/en/our\\_news/serbia-issues-over-50000-work-permits-to-foreign-nationals-in-2023/](https://welcometoserbia.org/en/our_news/serbia-issues-over-50000-work-permits-to-foreign-nationals-in-2023/)

62 <https://www.skopje.in/post/in-2023-turkish-citizens-dominant-among-foreign-workers-and-students-in-macedonia>

63 <https://connectingregion.com/news/rise-in-foreign-workforce-fills-gaps-in-bosnia-and-herzegovinas-industries/>

64 <https://www.koha.net/en/arberi/mbi-3600-te-huaj-erdhen-te-punojne-ne-kosove-me-2023-me-se-shumti-nga-turqia-e-bangladeshi>

65 <https://balkaninsight.com/2024/01/26/montenegros-population-rise-linked-to-influx-of-foreigners-demographers-say/>

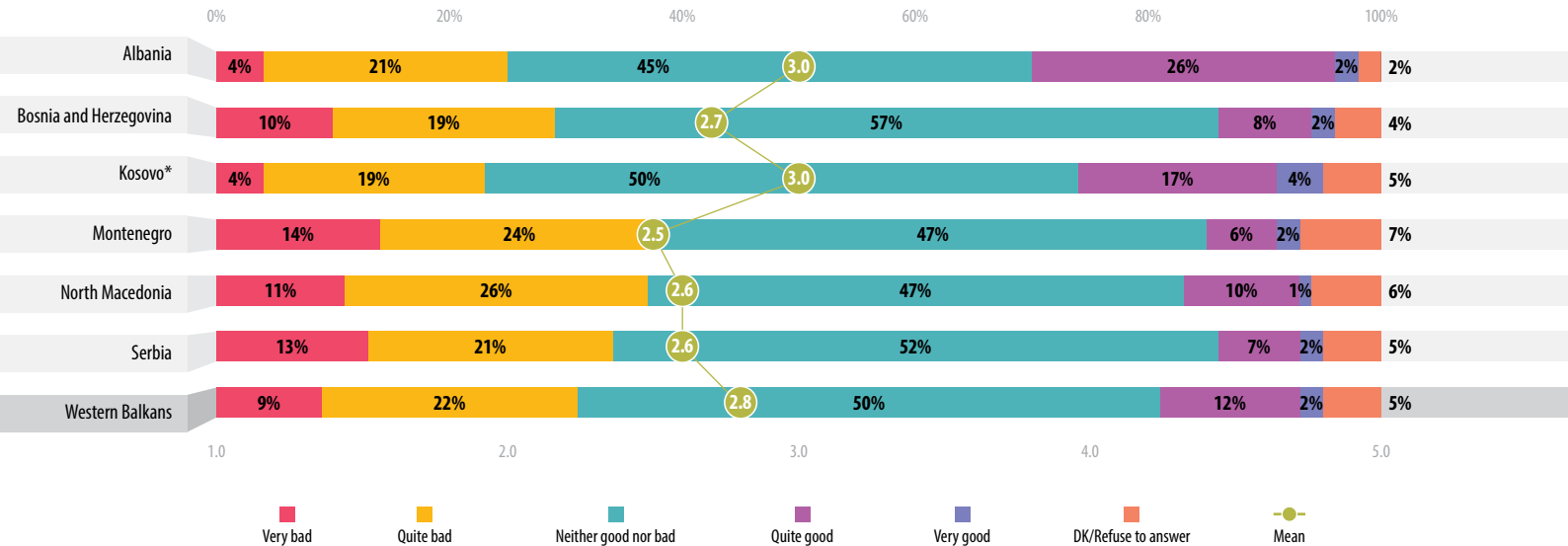
66 <https://politiko.al/e-tjera/punesimi-i-te-huajve-ne-shqiperi-kryesojne-te-ardhurit-nga-turqia-dhe-ba-i502186>

67 <https://euaa.europa.eu/lat-myr2024>

**Figure 20. Evaluating the Impact of Immigrants on Your Economy**

19. Now we would like to know your opinion about the people from other economies who come to live in your economy – the immigrants. How would you evaluate the impact of these people on the development of your economy?

(All respondents, N=6004, single answer, scale from 1 to 5, share of total, %)



The majority of citizens in the Western Balkans exhibit neutrality regarding the impact of immigration on their economies. Amongst these, Albanian citizens display the most ambivalence, with 28% holding a positive view of immigrants, followed by 21% of Kosovo\* citizens. The remaining economies in the region show less favourable sentiments, ranging from 14% in Serbia to a low of 8% in Montenegro. Conversely, a significant portion of Montenegro citizens, 38%, perceives immigrants as having a negative economic impact, with North Macedonia following closely at 37%, Serbia at 34%, Bosnia and Herzegovina at 29%, Albania at 25%, and Kosovo\* at 23%. Interestingly, although all economies of the region are suffering labour shortage, and experience a demographic decline (except for Montenegro), there is reluctance to view migrants as potential solution to filling job vacancies.

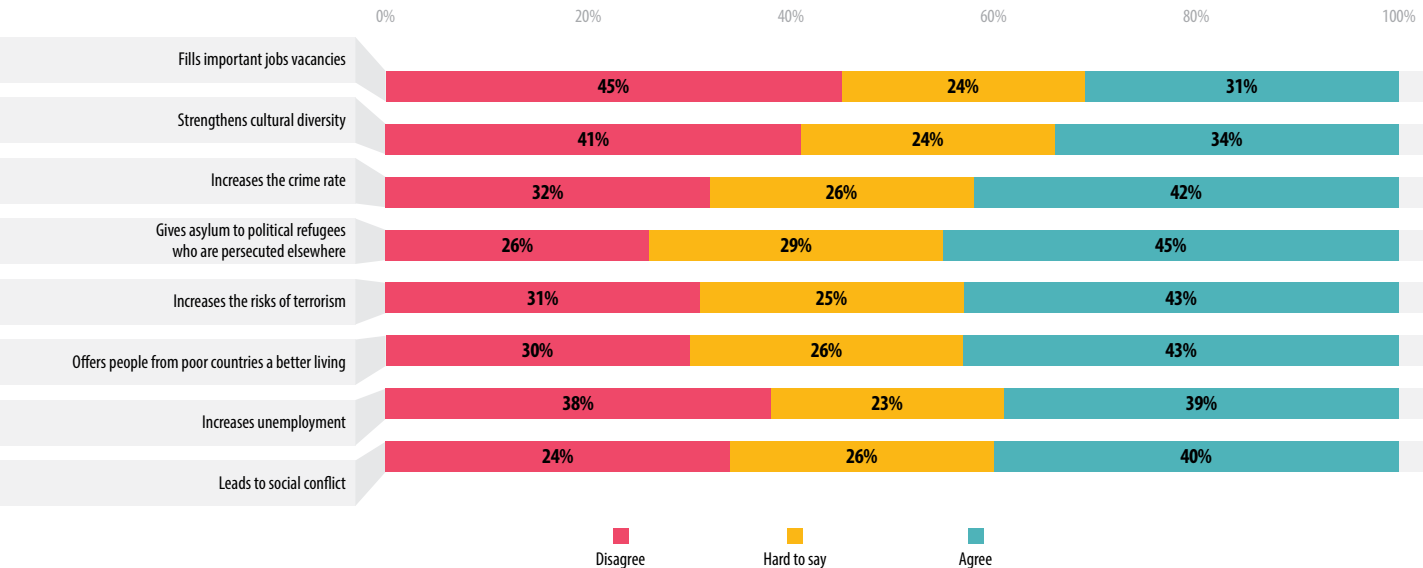
Kosovo\* citizens are nearly evenly split in their opinions, with 21% viewing immigrants positively and 23% negatively. Albania reflects a similar distribution, with 28% positive and 25% negative views. In contrast, other economies in the region exhibit a predominance of negative perceptions over positive ones. This disparity may be attributed to two primary factors: more acute labour shortages and population aging, due to emigration and declining birth rates in Albania and Kosovo\*.

The consistency between the current and 2023 findings suggests a persistent trend of regional neutrality and cautious optimism in Albania and Kosovo\*.



**Figure 21. Effects of Immigration on Economic Development: Agree or Disagree?**

20. From your point of view, what have been the effects of immigration on the development of our economy? For each of the following statements, please tell me whether you agree or disagree with it. – Results for the Western Balkans region  
(All respondents, N=6004, single answer, share of total, %)



The Western Balkan citizens seem to have a polarised perception of immigration’s impact on their respective economies, considering them both as threat and opportunity. While a notable 31% view immigration as a solution to labour shortages, a larger segment (39%) expresses concern over potential job displacement. This duality of opinion extends to sociocultural spheres: 34% perceive immigration as enriching cultural diversity, contrasted with 40% who associate it with heightened social tensions. Similarly, while 43% acknowledge the potential for improved livelihoods amongst immigrants from less prosperous nations, an almost equal proportion (42%) express anxiety regarding a possible rise in crime. This division is further evident in attitudes towards asylum, with 45% recognising its role in providing refuge for the persecuted, while 43% link immigration with an increased risk of terrorism.

While there is no data to substantiate fears of job displacement, social tensions, or rise in crime amongst migrants who are present in the Western Balkan economies, apparent anxieties seem to relate mostly to rather novel exposure of Western Balkan societies to irregular migration flows coupled with the challenge that demographic decline represents for the identity of small-sized economies.

**Table 10. Effects of Immigration on Economic Development: Your Agreement or Disagreement**

Q20. From your point of view, what have been the effects of immigration on the development of our economy?  
 For each of the following statements, please tell me whether you agree or disagree with it. – Results by  
 economies

1) *Fills important jobs vacancies*; 2) *Strengthens cultural diversity*; 3) *Increases the crime rate*; 4) *Gives asylum to  
 political refugees who are persecuted elsewhere*; 5) *Increases the risks of terrorism*; 6) *Offers people from poor  
 economies a better living*; 7) *Increases unemployment*; 8) *Leads to social conflict*

(All respondents, N=6004, single answer, share of total, %)

		1	2	3	4	5	6	7	8
Albania	Disagree	31%	32%	35%	20%	35%	31%	41%	36%
	Hard to say	17%	22%	23%	23%	22%	26%	20%	24%
	Agree	53%	47%	42%	57%	43%	42%	40%	41%
Bosnia and Herzegovina	Disagree	61%	46%	39%	32%	41%	41%	48%	44%
	Hard to say	19%	17%	18%	21%	19%	19%	16%	17%
	Agree	20%	38%	43%	47%	40%	40%	36%	39%
Kosovo*	Disagree	28%	35%	29%	23%	29%	18%	34%	28%
	Hard to say	35%	37%	39%	41%	38%	33%	35%	39%
	Agree	37%	25%	32%	36%	33%	48%	31%	33%
Montenegro	Disagree	53%	41%	32%	31%	31%	33%	31%	40%
	Hard to say	22%	21%	23%	24%	23%	22%	19%	21%
	Agree	25%	38%	45%	44%	45%	45%	50%	39%
North Macedonia	Disagree	45%	48%	25%	19%	23%	28%	34%	22%
	Hard to say	25%	30%	31%	36%	28%	32%	31%	34%
	Agree	30%	22%	44%	45%	49%	40%	35%	44%
Serbia	Disagree	51%	47%	33%	32%	30%	31%	40%	37%
	Hard to say	24%	19%	23%	26%	22%	23%	19%	20%
	Agree	25%	34%	44%	42%	48%	46%	42%	43%

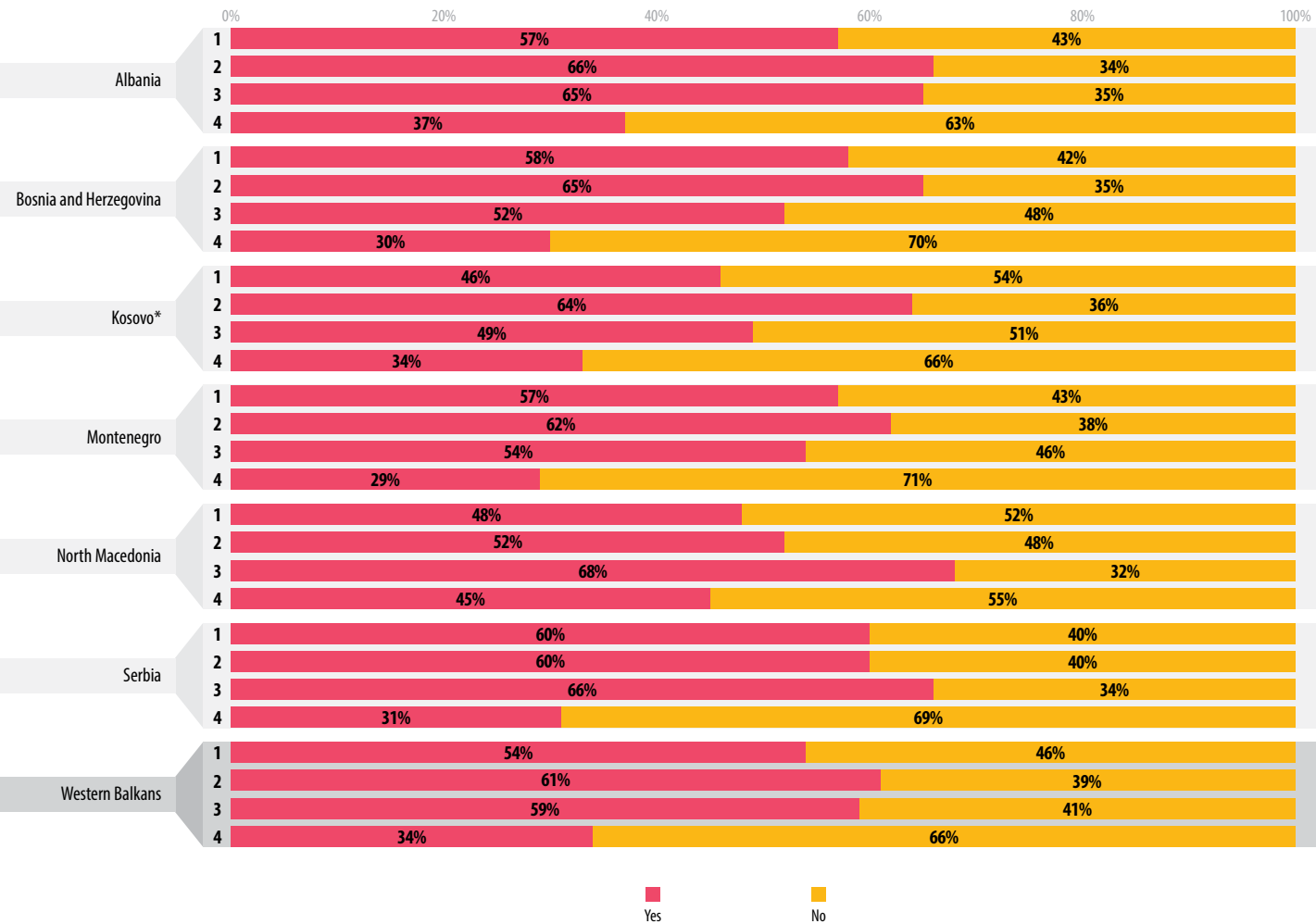
Ambivalence towards immigration predominates nearly all Western Balkan economies. However, Albania presents a distinct perspective, with a slim majority (53%) viewing immigration favourably as a means of addressing labour shortages, a pressing concern amplified by emigration and demographic decline. This similar pragmatic outlook extends to asylum policies, with a notable 57% of Albanian citizens expressing support for granting refuge to those facing persecution. This seemingly more pragmatic outlook in Albania should nevertheless be measured against the very insignificant number of asylum applications registered insofar, with most irregular migrants passing only in transit en route to the EU.

Figure 22. Government Actions for Foreign Workers: What Should Be Done?

Q21. How about people from other economies coming here to work. Which one of the following do you think the government should do?

1) No need to make changes in the current visa system; 2) Let people who are willing to work in my economy come as long as there are jobs available here; 3) Place strict limits on the number of foreigners who can come here; 4) Prohibit people coming here from other economies except the Western Balkans and EU economies

(All respondents, N=6004, single answer, share of total, %)



Western Balkan citizens are cautiously welcoming towards labour migration. While a majority across the region (Serbia 60%, Bosnia and Herzegovina 58%, Montenegro 57%, Albania 57%) expresses reservations about liberalising visa regimes with economies experiencing significant outward migration, there is a clear consensus on the need for managed labour mobility. This is evidenced by strong support for welcoming migrants to address labour shortages, with Albania (66%) and Bosnia and Herzegovina (65%) leading the way, closely followed by Kosovo\* (64%), Montenegro (62%), Serbia (60%) and North Macedonia (52%) at the lower end. This trend is also observed in each economy of the region where labour needs are met by foreign workers whose country of origin is rather different from migrants who irregularly pass their borders/boundaries.

Openness to labour mobility is tempered by a preference for regulated migration flows, as indicated by the significant majority in favour of limiting entry to meet specific labour needs (North Macedonia 68%, Serbia 66%).

Kosovo\* stands out with a more open stance, with 51% opposing strict entry quotas.

Furthermore, there is a region-wide rejection of outright bans on non-EU immigration, with over 60% in most economies expressing openness to welcoming individuals from beyond the region and the EU.

# CHAPTER E: EMIGRATION INTENTIONS, HUMAN SECURITY AND RESILIENCE

The 2024 SecuriMeter data paints a concerning picture of human security in the Western Balkans, revealing a region grappling with economic struggles and its ripple effects on migration and social stability. Discontent with prices, pensions, job opportunities, and healthcare is widespread across the region, highlighting the need for economic revitalisation and improved social welfare systems. A majority of citizens worry about affording routine healthcare, with even greater fear surrounding serious illness. This highlights the potential for catastrophic health expenditures and the need for stronger public health financing and social safety nets.

Across most of the region, temporary emigration is characterised by short stays abroad, likely driven by seasonal work or short-term opportunities. Albania diverges with a higher proportion of citizens seeking longer-term opportunities abroad, driven, amongst others, by overwhelming economic insecurity. The lack of diverse and well-paying job opportunities, especially for youth, leads to frustration and a sense of limited prospects, potentially fuelling dissatisfaction with government performance and responsiveness.

The data consistently points to economic concerns as a major driver of dissatisfaction and the chief push factor of emigration. The combination of high prices for basic goods and services alongside relatively low wages creates a strong economic "push" factor, driving citizens, particularly in Albania, to seek better opportunities abroad.

Latest UN report on world population prospects<sup>68</sup> estimates that the number of people living in the Western Balkan economies is projected to decline by 14% over the next 30 years, with Albania and Bosnia and Herzegovina likely to see the size of their population decline by 20% or more in the next three decades.

In countries where fertility levels are already below replacement, the emigration of people in the reproductive age range can contribute to further population decline. The Western Balkan economies already fall under this category, starting with Albania up to Serbia in the lower end, where emigration of large numbers of women of reproductive age may further reduce the number of births taking place in these economies, per UN estimates.

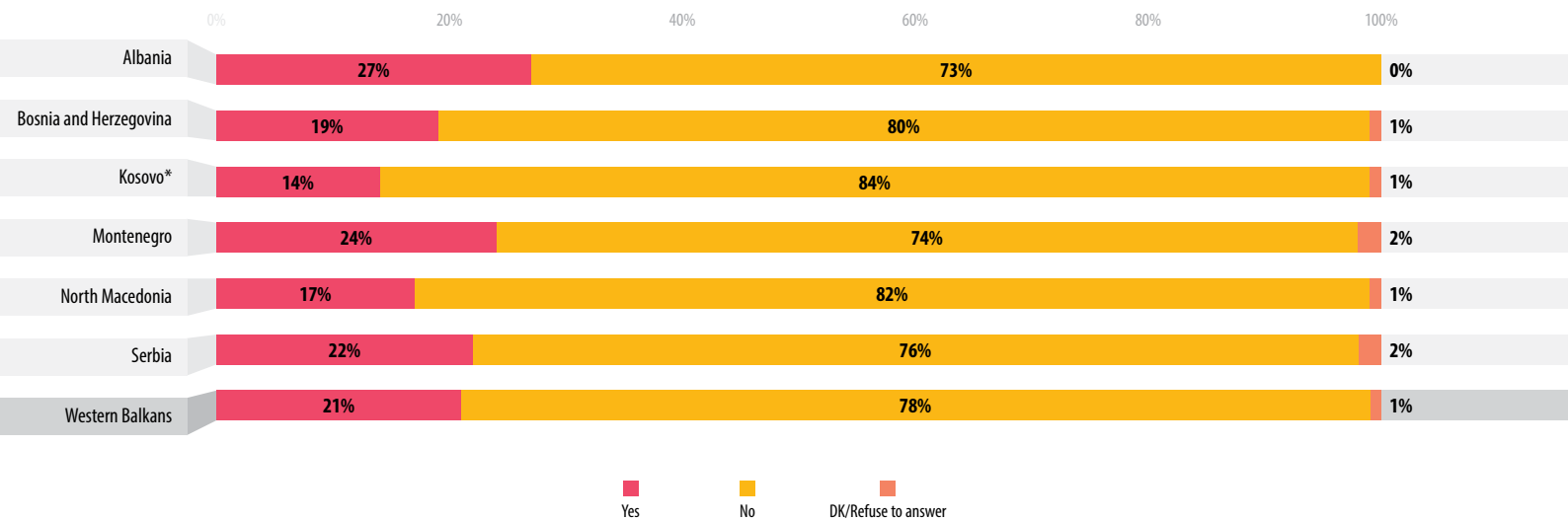
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68 [https://www.un.org/development/desa/pd/sites/www.un.org.development.desa.pd/files/undesapd\\_2024\\_wpp\\_2024\\_advance\\_unedited\\_0.pdf](https://www.un.org/development/desa/pd/sites/www.un.org.development.desa.pd/files/undesapd_2024_wpp_2024_advance_unedited_0.pdf)

Emigration poses rather complex and multifaceted challenges to each economy and the region as a whole, as the loss of human capital can undermine economic, social and democratic stability.

If pervasive economic hardship and dissatisfaction with governance are not addressed, they can contribute to social unrest, political instability, and hinder democratic progress.

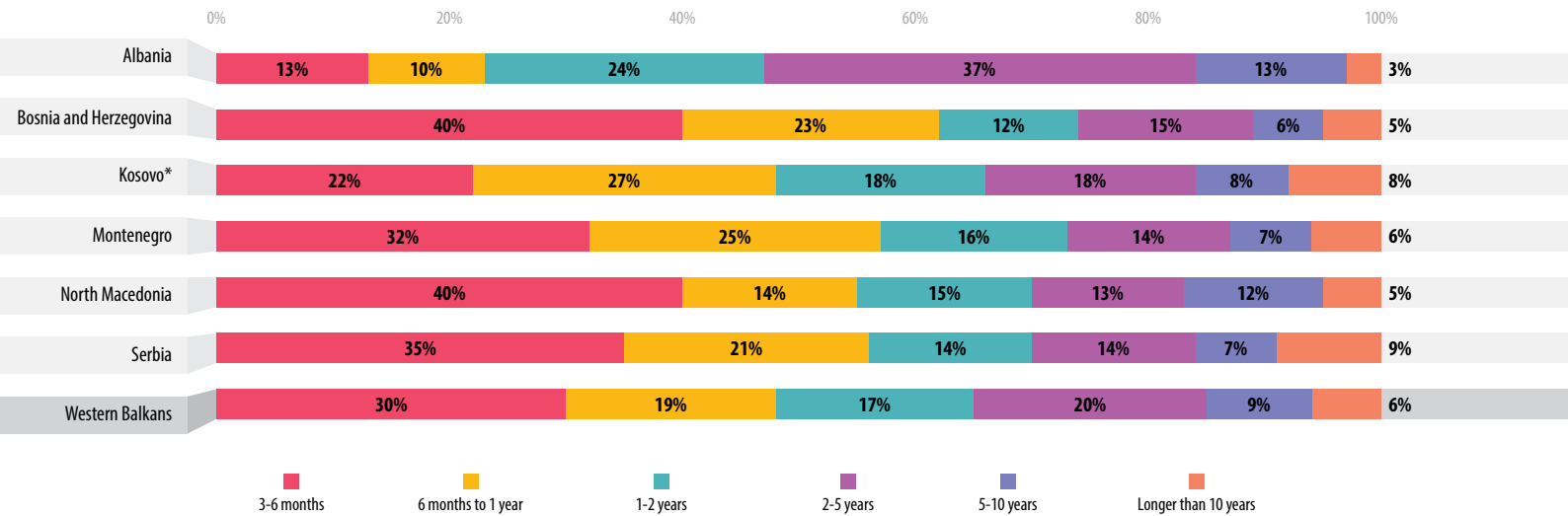
**Figure 23. Experience of Staying Abroad for Over 3 Months**  
22. Have you so far stayed abroad for longer than 3 months?  
(All respondents, N=6004, single answer, share of total, %)



Similar to last year's data, analysis of temporary emigration patterns within the Western Balkans reveals that the vast majority of citizens remain abroad for relatively short durations. While there is variation across the region, less than 30% of citizens in any Western Balkan economy have spent more than three months outside their home economy. Albania exhibits the highest proportion of citizens with extended stays abroad (27%), potentially reflecting historical migration patterns and ongoing economic factors. In contrast, Kosovo\* stands out with the lowest percentage (14%) of citizens reporting stays exceeding three months, suggesting comparatively lower levels of temporary emigration. The remaining economies fall within a similar range, with Montenegro (24%), Serbia (22%), Bosnia and Herzegovina (19%), and North Macedonia (17%) demonstrating a moderate prevalence of longer-term temporary emigration.

**Figure 24. Duration of Living Abroad for Over 3 Months**

Q23. How long did you live in a foreign country where you stayed longer than 3 months?  
(Respondents who stayed abroad for longer than 3 months (answer Yes at Q22), N=1232, single answer, share of total, %)

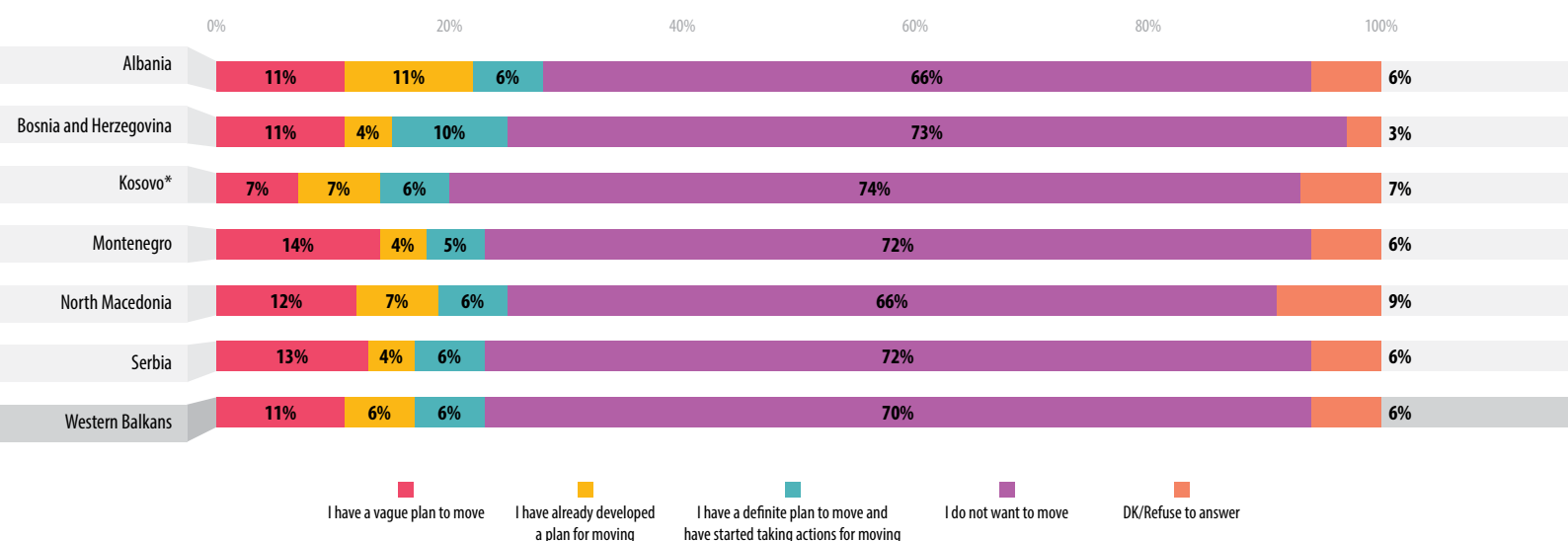


While temporary emigration is common across the Western Balkans, the duration of these stays varies significantly. A majority of citizens in most economies who exceed the three-month threshold remain abroad for a relatively short period, typically between six months and two years. This trend is particularly pronounced in Bosnia and Herzegovina (75%), Montenegro (73%), North Macedonia (69%), Serbia (70%), and Kosovo\* (67%).

However, Albania diverges significantly from this pattern, with a majority (53%) of citizens who stay beyond three-month period abroad for considerably longer durations. This finding suggests that emigration from Albania is driven by different factors, including a search for more permanent settlement opportunities, compared to other Western Balkan economies where shorter-term stays are more prevalent.

**Figure 25. Intentions to Relocate Abroad for Work and Living**

Q 24. Do you intend to move abroad for living and working?  
(All respondents, N=6004, single answer, share of total, %)



Migratory intentions across the Western Balkan economies continue to demonstrate a concerning pattern, with 11% of citizens expressing tentative plans for relocation and an additional 12% having formulated concrete plans or initiated the emigration process. These statistics are particularly alarming given that the majority of potential emigrants are from the young and economically active population segment. This trend is exacerbated by the ongoing demographic decline, albeit at varying rates, throughout the Western Balkans region, presenting a significant challenge to long-term economic development, democratic and societal stability.

Albania exhibits the highest propensity for emigration, with 17% of its citizens having developed relocation plans or begun the process, while 66% express no desire to relocate. Bosnia and Herzegovina follows at 14%, Kosovo\* and North Macedonia at 13%, Serbia at 10%, and Montenegro at 9% in terms of citizens with concrete emigration plans or actions.

The 2023 population and housing census in Albania<sup>69</sup> reveals a significant demographic shift, with the population decreasing by 13.8% between 2011 and 2023. This decline is attributed to low fertility rates and high emigration, particularly amongst the working-age population, resulting in an aging demographic structure where individuals aged 65 and above constitute 19.7% of the total population.

Eurostat data<sup>70</sup> indicate that amongst EU candidate and potential candidates, only Türkiye experienced population growth between 2012 and 2022. While comprehensive population data is not yet available for all Western Balkan economies, preliminary results indicate a substantial decrease in Albania's population over the past decade.

Similarly, earlier data<sup>71</sup> highlighted those citizens of Albania and Kosovo\* express particular concern regarding depopulation and emigration, with 64% and 53% respectively identifying these as the most critical non-economic challenges facing their economies.

These trends underscore the urgent need for comprehensive policy interventions to address the interconnected challenges of emigration and demographic decline in the Western Balkans. Failure to address these issues effectively carries significant implications for regional economic development, social cohesion, and the long-term stability of democratic institutions.

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69 <https://www.instat.gov.al/media/13581/cens-i-popullsise-2023.pdf>

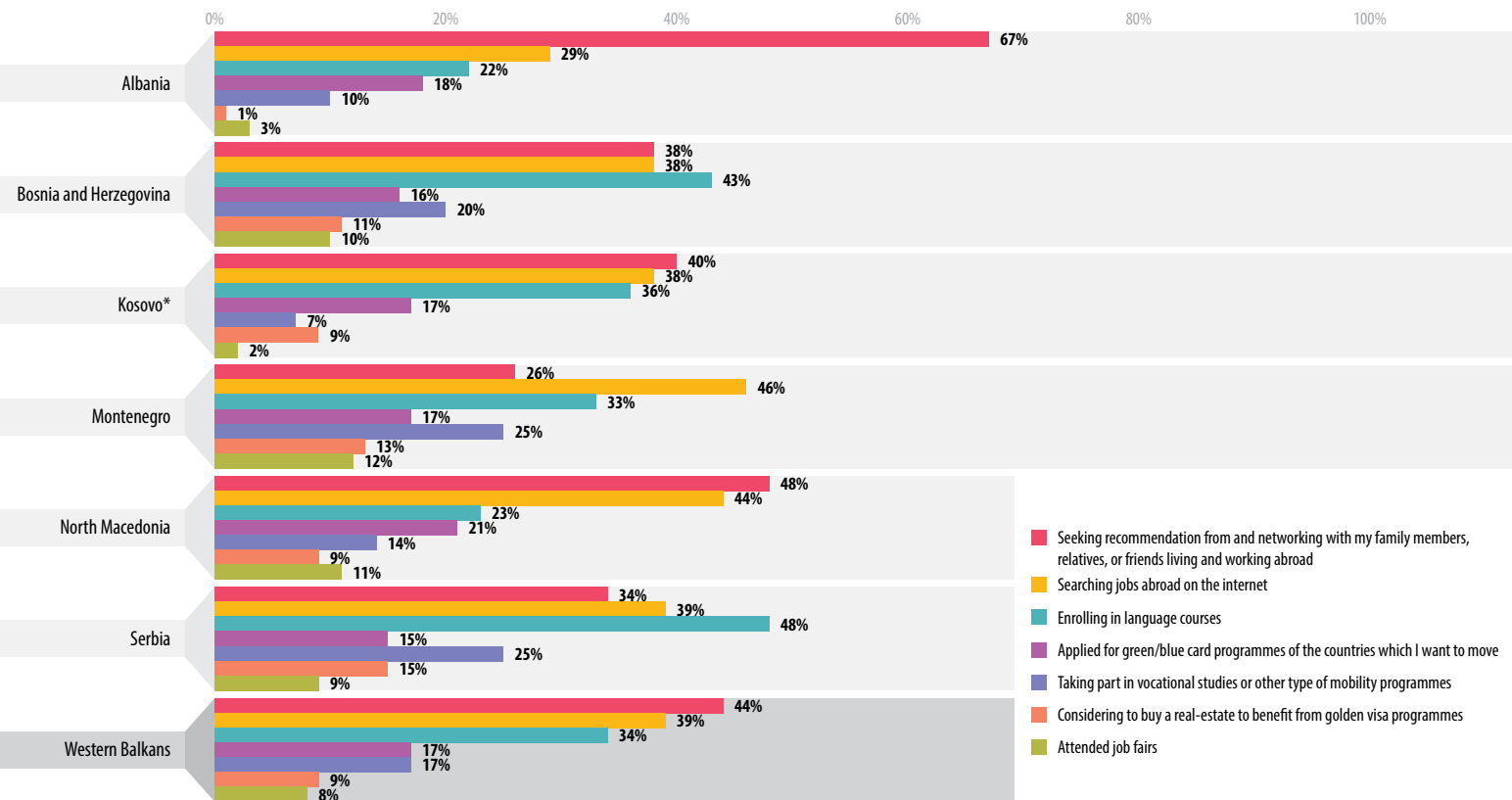
70 [https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Population\\_in\\_candidate\\_countries\\_and\\_potential\\_candidates](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Population_in_candidate_countries_and_potential_candidates)

71 Re: Question 12.2



**Figure 26. Actions Taken to Move Abroad for Work and Living**

Q 25. Have you taken any of the actions below to move abroad for living and working?  
Pick one or more which are appropriate for your situation.  
(Respondents who want to move, N=1402, multiple answers, share of total, %)



Analysis of concrete actions taken by Western Balkan citizens towards emigration reveals distinct patterns across the region, reflecting cultural, historical, and social network influences.

A significant majority of Albanian citizens (67%) prioritise utilising established networks of family and friends residing abroad as their primary emigration strategy. This approach is also prevalent in North Macedonia (48%) and Kosovo\* (40%). This reliance on pre-existing social connections suggests a potential for higher emigration rates in these economies, as group dynamics and support systems can facilitate the process.

In contrast, citizens of Serbia, Bosnia and Herzegovina, and Montenegro demonstrate a preference for more individualistic preparatory actions. Enrolling in language courses emerges as the most frequent step taken by Serbia (48%) and Bosnia Hercegovina (43%) citizens. Similarly, online job searching ranks highly in these economies, with 39% of respondents in Serbia and 38% in Bosnia Hercegovina prioritising this method. Montenegrin citizens exhibit a similar trend, with 46% prioritising online job searches and 33% focusing on language acquisition.

While online job searching and language learning are theoretically accessible to all Western Balkan citizens, the reliance on familial and social networks abroad is contingent upon the availability of such connections. The prevalence of this approach amongst respondents from Albania, North Macedonia and Kosovo\* suggests a higher prevalence of established diaspora communities, potentially contributing to higher emigration figures.

An interesting trend reappears in the pursuit of "golden visa" programmes. Excluding Albania (1%), a notable proportion of citizens in other Western Balkan economies (ranging from 9% in Kosovo\* to 15% in Serbia) consider real estate investment as a pathway to emigration.

These variations in emigration preparation strategies highlight the diverse factors influencing outward migration within the Western Balkans. The reliance on established diaspora networks in some economies suggests a potential for sustained or even increased emigration flows, while the individualistic approaches observed in other economies point towards different motivational factors and potentially different emigration patterns. Understanding these nuances is crucial for developing targeted policy interventions aimed at addressing the root causes and potential consequences of emigration within the region.

**Figure 27. Top 3 Reasons for Moving Abroad for Work and Living**

26. What are the three (3) main reasons for moving abroad for living and working?  
(Respondents who want to move, N=1402, multiple answers, share of total, %)

	Albania	Bosnia and Herzegovina	Kosovo*	Montenegro	North Macedonia	Serbia	Western Balkans
1.) Found a job abroad or recruited by an employer abroad	20%	33%	40%	33%	11%	37%	<b>28%</b>
2.) To reunite with the remaining family members	31%	30%	8%	19%	20%	19%	<b>22%</b>
3.) To be sent by the current employer in home economy	1%	16%	26%	11%	6%	16%	<b>12%</b>
4.) To receive a higher salary for my work	61%	61%	15%	70%	63%	65%	<b>57%</b>
5.) To be eligible for retirement in a foreign pension system	10%	26%	40%	20%	16%	19%	<b>21%</b>
6.) To go to school or university	19%	12%	14%	15%	9%	13%	<b>14%</b>
7.) To provide a better quality of life to my children	43%	43%	21%	47%	38%	53%	<b>41%</b>
8.) To live in my (foreign) partner's home country (for her/his work)	6%	9%	47%	11%	9%	7%	<b>14%</b>
9.) Other family reasons	28%	12%	4%	16%	27%	12%	<b>17%</b>
10.) Looking for an adventure/personal challenge	9%	7%	20%	14%	14%	11%	<b>12%</b>
11.) To retire abroad	9%	10%	9%	10%	13%	6%	<b>10%</b>
12.) Political, religious, or safety reasons	1%	9%	9%	6%	8%	4%	<b>6%</b>
13.) To have better air quality / climate	13%	5%	4%	4%	12%	11%	<b>8%</b>
14.) To receive better health services	37%	18%	11%	6%	28%	14%	<b>20%</b>
15.) To start own business	2%	6%	27%	10%	9%	7%	<b>10%</b>
16.) To improve language skills	8%	3%	3%	7%	12%	4%	<b>6%</b>
17.) Volunteering or missionary work	1%	0%	3%	0%	3%	1%	<b>1%</b>

The three main push factors driving emigration for citizens of Albania are the need for higher salaries (61%), better quality of life for the children (43%), and better health service (37%). For Bosnia and Herzegovina, it is the need for higher salaries (61%), better quality of life for the children (43%), and job mobility (33%). For Kosovo\* the main push factors are living in foreign partner's home economy (47%), job mobility (40%), and eligibility for retirement in a foreign pension system (40%). For Montenegro, the three main reasons for emigration are the need for higher salary (70%), better quality of life for the children (47%), and job mobility (30%). The three main motives driving emigration in Serbia are the need for higher salary (65%), better quality of life for children (53%), and job mobility (37%). Similarly, citizens of North Macedonia have overwhelmingly listed the need for

higher salary (63%), better quality of life for children (38%), and a better health system (28%), as their three main push factors of emigration.

While economic factors emerge as the primary drivers of emigration across the Western Balkans, a nuanced analysis reveals significant variations in motivational factors, particularly in the case of Kosovo\*. Across the region, the desire for higher salaries consistently ranks as the most compelling reason for emigration. This sentiment is particularly pronounced in Montenegro (70%), followed closely by Serbia (65%), North Macedonia (63%), and Albania and Bosnia and Herzegovina (61% each). This underscores the pervasive influence of economic disparities and limited opportunities within the region, pushing individuals to seek improved financial prospects abroad.

Improving the quality of life for children emerges as the second most crucial driver, resonating with an average of 41% of respondents across the region. Serbia exhibits the highest proportion (53%) prioritising this factor, while North Macedonia records the lowest (38%). This highlights the importance placed on securing a brighter future for future generations, even if it necessitates relocating away from homeland. Data from Kosovo\* reveals a distinct set of motivational factors driving emigration, diverging significantly from the broader regional trends. While economic considerations remain relevant, they are less dominant compared to other Western Balkan economies. Notably, only 15% of respondents from Kosovo\* cite higher salaries as their primary motivation for emigration.

Two main factors may contribute to this anomaly:

1. The enduring presence of international organisations and peacekeeping forces in Kosovo\* has led to a higher incidence of intermarriage and relationships between locals and foreigners. Consequently, "living in a foreign partner's home economy" emerges as the primary driver of emigration for 47% of respondents from Kosovo\*, a stark contrast to the single-digit figures observed in other Western Balkan economies. This suggests that emigration from Kosovo\* is often driven by personal circumstances and family ties, rather than solely economic considerations.
2. The eligibility for retirement benefits in foreign pension systems represents another significant push factor for respondents from Kosovo\* (40%), far exceeding the regional average (21%). This suggests that long-term financial insecurity, particularly in retirement, plays a more prominent role in emigration decisions within Kosovo\*.

The persistent outflow of skilled and educated individuals, primarily driven by economic disparities, poses a significant challenge to the long-term economic development of the Western Balkans. Sustained emigration contributes to demographic imbalances, particularly when accompanied with low birth rates. This leads to shrinking workforces, strains social security systems, and impacts long-term economic growth potential. Exodus of young and educated individuals also weakens democratic institutions and processes. A diminished sense of opportunity and disillusionment with governance leads to reduced civic engagement, hindering democratic consolidation and progress.

**Table 11. Choosing a Country for Living and Working**

27. Which of the following countries would you choose to move for living and working?  
(Respondents who want to move, N=1402, multiple answers, share of total, %)

	Albania	Bosnia and Herzegovina	Kosovo*	Montenegro	North Macedonia	Serbia	Western Balkans
1.) Another economy in the Western Balkans	0%	6%	3%	10%	1%	9%	5%
2.) USA	16%	12%	5%	20%	8%	10%	12%
3.) Canada – Australia – New Zealand	5%	6%	0%	10%	7%	11%	6%
4.) UK	11%	3%	0%	3%	2%	3%	4%
5.) Switzerland	5%	15%	19%	14%	20%	17%	15%
6.) Turkey	1%	4%	1%	2%	2%	0%	2%
7.) Germany – Austria	30%	33%	57%	18%	33%	21%	32%
8.) Slovenia – Croatia	0%	5%	2%	3%	5%	4%	3%
9.) Italy	15%	3%	1%	2%	6%	5%	6%
10.) Greece	4%	1%	0%	0%	1%	2%	1%
11.) Sweden	4%	4%	5%	5%	3%	6%	4%
12.) Other EU member states than the ones mentioned above	8%	3%	5%	5%	7%	6%	6%
13.) Russia	0%	1%	0%	3%	0%	0%	1%
14.) China	0%	0%	1%	0%	0%	0%	0%
15.) Gulf countries	0%	0%	0%	1%	0%	2%	1%
16.) Other (not specified above)	1%	0%	0%	1%	0%	1%	1%
17.) I don't know/refuse to answer – DO NOT READ	1%	5%	1%	1%	4%	1%	2%

Analysis of preferred emigration destinations amongst Western Balkan citizens reveals a complex interplay of historical ties, existing diaspora networks, and evolving economic opportunities.

Confirming recurring trends, Germany and Austria emerge as the top emigration destinations for all Western Balkan economies. This preference is particularly pronounced in Kosovo\*, with 57% of respondents indicating these economies as their preferred destinations. Other economies demonstrate a slightly lower, but still significant, preference, ranging from 18% in Montenegro to 33% in Albania. This enduring appeal can be attributed to several factors, including established diaspora communities, having strong economies and social welfare systems, as well as geographical proximity and cultural familiarity.

Switzerland, historically a popular destination for citizens of former Yugoslavia, continues to attract emigrants from the Western Balkans, albeit at lower rates compared to Germany and Austria. This trend is evident in Montenegro (14%) and North Macedonia (20%). However, Albania deviates from this pattern, with only 5% of respondents selecting Switzerland as a preferred destination.

The USA, once a highly sought-after destination, also exhibits a declining appeal across most Western Balkan economies. This shift can be attributed to factors such as stringent immigration policies, geographical distance, as well as the rise of economic powerhouses in Europe.

Interestingly, intra-regional mobility within the Western Balkans remains limited. While a small percentage of citizens from Serbia (9%), Montenegro (10%), and Bosnia and Herzegovina (6%) con-

sider relocating within the region, this option holds little appeal for citizens of Albania, Kosovo\*, and North Macedonia.

With no significant economic disparities within the region, the incentive for intra-regional migration remains limited, as individuals primarily seek improved economic prospects abroad. At the same time, lingering tensions and historical baggage from the past discourage cross-border emigration within the region.

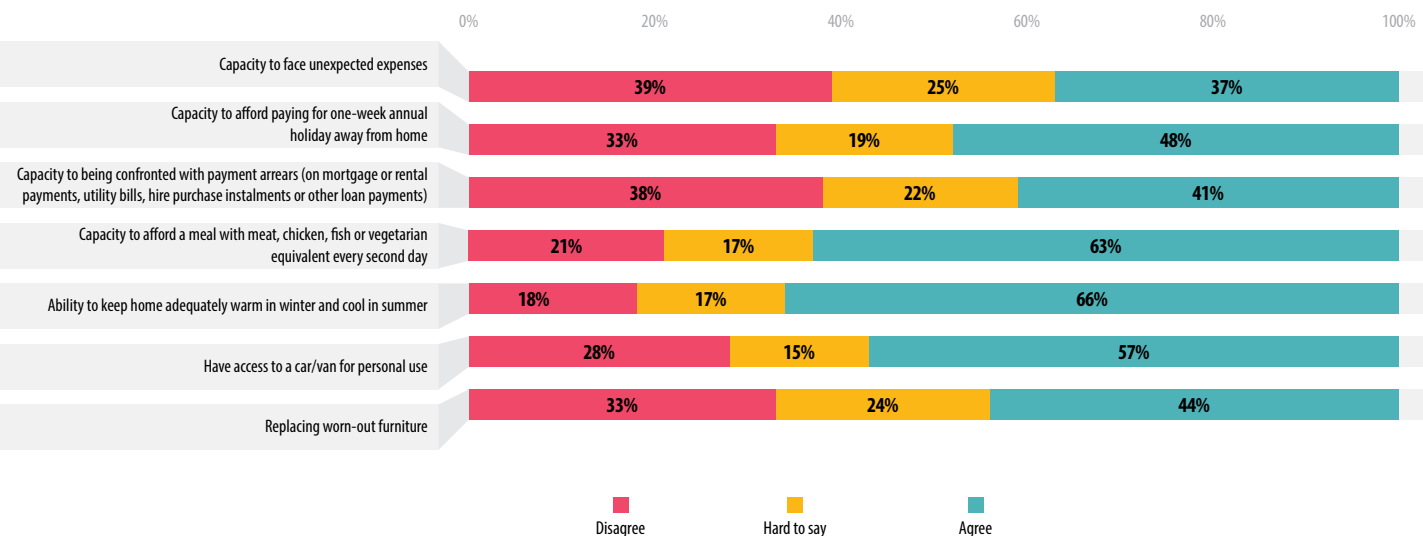
While traditional destinations continue to dominate, some emerging trends are worth noting.

Italy and the UK remain attractive for Albanian citizens, with 14% and 11% of respondents, respectively, indicating them as preferred destinations. This reflects established migration networks and historical ties. Sweden, on the other hand, emerges as a potential destination across all Western Balkan economies (4%), probably due to its appealing social welfare system and perceived openness to immigrants.

Whereas, Türkiye, Gulf economies, Russia and China are not generally viewed as potential destinations, except for 4% of Bosnia and Herzegovina citizens indicating Türkiye as a preferred destination.

**Figure 28. Household Economic Capacity in the Western Balkans**

28.A. From your point of view, does your household have sufficient economic capacity to afford the following? – Results for the Western Balkans region  
(All respondents, N=6004, single answer, share of total, %)



Household economic well-being across the Western Balkans displays widespread financial vulnerability and limited capacity to afford basic necessities. While a degree of resilience is observed in meeting fundamental needs like food and shelter, a significant proportion of the population faces challenges in managing unexpected expenses and accessing non-essential goods and services.

A striking finding is the limited financial buffer available to most households in the region. Only 37% of respondents report having the capacity to cover unexpected expenses, highlighting a high degree of financial fragility. Almost 4 in 10 respondents from the Western Balkans are deprived

of such capacity, compared to 3 in 10 of the EU population.<sup>72</sup> This means that a significant portion of the population operates with limited savings and is vulnerable to economic shocks, such as job loss or unexpected medical bills.

The ability to afford discretionary expenses, indicative of a household's financial well-being, is also constrained. Less than half of the respondents (48%) can afford an annual one-week holiday, underscoring the limited disposable income available to a large segment of the population. While 28.5% of the EU population were unable to afford this<sup>73</sup>, 33% of the Western Balkan citizens suffer from such deprivation and another 19% borderline the capacity to afford one-week holiday.

Similarly, only 41% can comfortably manage housing costs such as mortgage, rent, or utilities, and 44% can afford to replace worn-out furniture. These findings indicate that a significant proportion of households prioritise basic needs over flexible spending.

Despite these challenges, a degree of resilience is observed in meeting fundamental needs. A majority of respondents (63%) report the ability to afford nutritious food every other day, and 66% can maintain adequate heating and cooling in their homes. Yet, those unable to afford a proper meal in the Western Balkans region constitute a significant segment of society (21%) compared to 9.5% of EU average<sup>74</sup>.

Access to personal vehicles, often considered an indicator of economic well-being and social mobility, is relatively high in the region, with 57% of citizens reporting access to a car for personal use. This suggests that car ownership remains a priority for many households, even amidst broader financial constraints.

2024 SecuriMeter data highlight the precarious economic reality faced by many in the Western Balkans. While a degree of resilience is evident in meeting basic needs, the widespread inability to manage unexpected expenses and limited access to discretionary spending underscore the vulnerability of a significant portion of the population.

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72 <https://ec.europa.eu/eurostat/documents/15216629/19559843/KS-EI-24-001-EN-N.pdf/4aa75d55-c529-414b-5dc2-e4be3df1b199?version=3.0&t=1722243547613>

73 <https://ec.europa.eu/eurostat/documents/15216629/19559843/KS-EI-24-001-EN-N.pdf/4aa75d55-c529-414b-5dc2-e4be3df1b199?version=3.0&t=1722243547613>

74 <https://ec.europa.eu/eurostat/web/products-eurostat-news/w/ddn-20240712-1>

**Table 12. Economic Capacity of Households to Afford Expenses: Results by Economies**

28.A. From your point of view, does your household have sufficient economic capacity to afford the following? – Results by economies

1) Capacity to face unexpected expenses; 2) Capacity to afford paying for one-week annual holiday away from home; 3) Capacity to being confronted with payment arrears (on mortgage or rental payments, utility bills, hire purchase instalments or other loan payments); 4) Capacity to afford a meal with meat, chicken, fish or vegetarian equivalent every second day; 5) Ability to keep home adequately warm in winter and cool in summer; 6) Have access to a car/van for personal use; 7) Replacing worn-out furniture

(All respondents, N=6004, single answer, share of total, %)

		1	2	3	4	5	6	7
Albania	Agree	53%	37%	51%	21%	28%	46%	49%
	Hard to say	20%	12%	21%	14%	16%	9%	23%
	Disagree	27%	51%	28%	65%	55%	46%	28%
Bosnia and Herzegovina	Agree	34%	33%	37%	20%	16%	19%	22%
	Hard to say	19%	15%	15%	10%	10%	10%	14%
	Disagree	47%	52%	48%	70%	75%	71%	63%
Kosovo*	Agree	27%	27%	23%	21%	17%	26%	20%
	Hard to say	34%	31%	31%	29%	30%	26%	37%
	Disagree	38%	42%	47%	51%	53%	47%	43%
Montenegro	Agree	38%	37%	39%	18%	15%	21%	35%
	Hard to say	24%	18%	19%	15%	12%	13%	17%
	Disagree	39%	45%	43%	67%	73%	66%	47%
North Macedonia	Agree	38%	30%	38%	19%	14%	28%	35%
	Hard to say	28%	21%	25%	19%	18%	17%	28%
	Disagree	34%	49%	36%	63%	68%	55%	37%
Serbia	Agree	42%	35%	38%	24%	18%	26%	35%
	Hard to say	23%	17%	19%	14%	14%	15%	21%
	Disagree	35%	48%	42%	62%	68%	59%	44%

A closer examination of financial vulnerability across the Western Balkans reveals a complex picture. While Bosnia and Herzegovina demonstrate the highest capacity to cover basic expenses, Albania emerges as an outlier, grappling with the highest levels of deprivation. Kosovo\*, on the other hand, exhibits a unique profile with the lowest inability to afford basic needs, but the highest proportion of citizens swaying on the brink of financial insecurity.

More than half of citizens in Albania cannot afford to pay unexpected expenses (53%), or to pay their mortgage, rent and utility (51%). Other economies of the region are somewhat less weak, as their inability to face such expenses ranges from lowest 23% in Kosovo\* to highest 42% in Serbia. 46% of Albanian citizens do not have access to a car for personal use, whereas the rest of the region ranges from 28% in North Macedonia to 19% in Bosnia and Herzegovina of those who do not have access to a car.

49% of Albanian citizens cannot afford to replace worn-out furniture, followed by 35% of respondents in Serbia, North Macedonia and Montenegro who cannot afford such expenses. Only 20% of citizens of Kosovo\* and 22% of Bosnia and Herzegovina cannot afford replacing worn-out furniture. On average, 30% of the respondents are unable to pay for one-week annual holiday. Around 20% are unable to afford a protein meal every second day with. All Western Balkan economies display similar strength to cover such expenses.

The percentage of those unable to keep home adequately warm/cool ranges from 14% in North Macedonia to 28% in Albania.

The data paints a concerning picture of financial hardship in Albania. More than half of Albanian citizens struggle to afford unexpected expenses (53%) and face difficulties covering essential housing costs (51%). Furthermore, 46% lack access to a personal vehicle, and 49% cannot afford to replace worn-out furniture. These figures significantly exceed those observed in other Western Balkan economies, highlighting a deeper level of economic hardship and limited access to basic necessities.

While Kosovo\* records the lowest proportion of citizens unable to afford basic expenses, a significant feature emerges. Kosovo\* exhibits the highest percentage of respondents expressing uncertainty or borderline insecurity in meeting these needs. This suggests that while a smaller proportion of respondents from Kosovo\* currently faces outright deprivation, a significant segment of the population remains vulnerable to economic shocks and could easily slip into financial hardship.

Bosnia and Herzegovina emerge as a relative "bright spot", with the highest proportion of citizens reporting the ability to cover basic expenses. However, challenges persist, as 22% still struggle to afford replacing worn-out furniture, indicating that pockets of vulnerability remain active.

Despite variations in the overall level of financial security, several common challenges emerge across the Western Balkans.

The ability to manage unexpected financial expenses remains a significant challenge across the region.

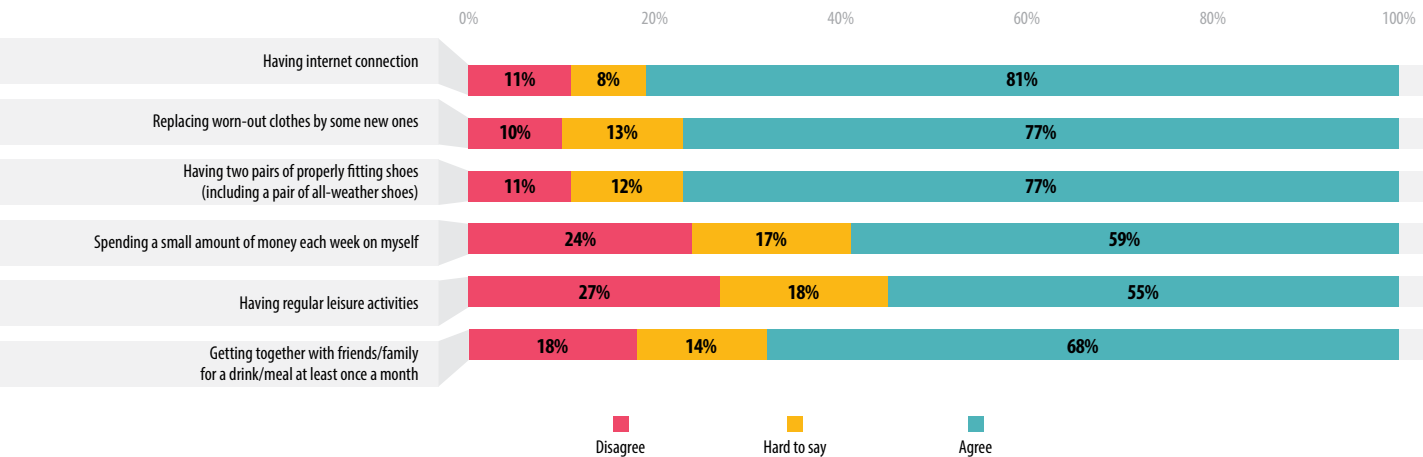
Affording an annual holiday, often considered a benchmark of financial well-being, remains out of reach for a significant proportion of citizens across all economies, underscoring the limited disposable income available to many households.

While access to food and shelter appears relatively secure across the region, variations exist, with Albania reporting higher levels of deprivation, particularly concerning access to personal vehicles and durable goods.



**Figure 29. Economic Power to Afford Personal Expenses**

28.B. Do you have the economic power to afford the following for your individual use? – Results for the Western Balkans region  
(All respondents, N=6004, single answer, share of total, %)



While previous data highlighted the struggle to meet basic needs, cross-examination analysis shows that economic hardship in the Western Balkans extends beyond material necessities, impacting individual well-being and social participation. Limited access to leisure activities, personal spending, and social gatherings sheds light to the broader social and psychological consequences of financial insecurity in the region.

Even seemingly basic amenities like internet access, often considered essential in today's interconnected world, pose challenges for some. With 1 in 10 respondents unable to afford internet access, a digital divide persists, potentially exacerbating social exclusion and limiting access to information and opportunities.

The similar inability (1 in 10) to afford basic necessities like replacing worn-out clothes or owning two pairs of properly fitting shoes further highlights the challenges faced by a segment of the population in maintaining a decent standard of living.

Beyond material needs, economic hardship significantly impacts social participation and personal well-being. A striking 27% of citizens cannot afford regular leisure activities, hindering their ability to engage in hobbies, pursue interests, and experience the social and psychological benefits of leisure.

Furthermore, 24% of respondents lack a small weekly budget for personal use, limiting their ability to self-care, or pursue personal aspirations. This lack of financial breathing room can contribute to feelings of deprivation and frustration, impacting overall well-being.

The inability to afford social gatherings even once a month, reported by 18% of citizens, further underscores the social impact of economic hardship.

Figure 30. Economic Power to Afford Personal Expenses – Economies of the Western Balkans

28.B. Do you have the economic power to afford the following for your individual use? – Results by economies  
1) Having internet connection; 2) Replacing worn-out clothes by some new ones; 3) Having two pairs of properly fitting shoes (including a pair of all-weather shoes); 4) Spending a small amount of money each week on myself; 5) Having regular leisure activities; 6) Getting together with friends/family for a drink/meal at least once a month.



While access to basic necessities like internet connection and clothing remains relatively consistent across the Western Balkans, disparities emerge when examining the ability to afford discretionary spending and leisure activities. These discrepancies highlight a region grappling with uneven economic progress and a widening gap between those who can enjoy a decent standard of living and those struggling to make ends meet.

About 8 in 10 citizens of Western Balkan economies can afford internet connection and replace worn-out clothes, indicating that these basic needs are largely being met.

The overwhelming majority of respondents have access to two pairs of properly fitting shoes, peaking 83% in Bosnia and Herzegovina and 81% in Montenegro, to lowest 69% in Kosovo\*, signifying progress in meeting this basic need.

However, stark disparities emerge when analysing discretionary spending and leisure activities.

The ability to afford a weekly personal budget varies significantly, with Albania reporting the highest proportion of citizens struggling at 34%, compared to (29% in Bosnia and Hercegovina, 25% in Serbia and Montenegro, 19% in North Macedonia) only 11% in Kosovo\*. This suggests a greater degree of financial constraint and limited disposable income in Albania.

The most pronounced discrepancies emerge in accessing leisure activities. Over half (53%) of Albanian citizens cannot afford regular leisure activities, a stark contrast to (27% in Bosnia and Hercegovina, 23% in Montenegro, 22% in Serbia and North Macedonia) only 14% in Kosovo\*. This disparity again highlights a significant gap in living standards and access to opportunities for personal fulfilment and social engagement.

The data consistently identifies Albanian citizens as facing the most significant economic hardships. Whether it's affording a weekly personal budget or enjoying leisure activities, Albania consistently reports the highest proportions of citizens struggling to make ends meet. This underscores the urgent need to address poverty and create economic opportunities in Albania.

The significant number of respondents expressing uncertainty about their financial situation raises concerns. This "borderline unable" group represents a vulnerable segment of society, swaying on the edge of financial insecurity and susceptible to economic shocks. Their precarious situation underscores the need for robust social safety nets and support systems to prevent them from falling into poverty.

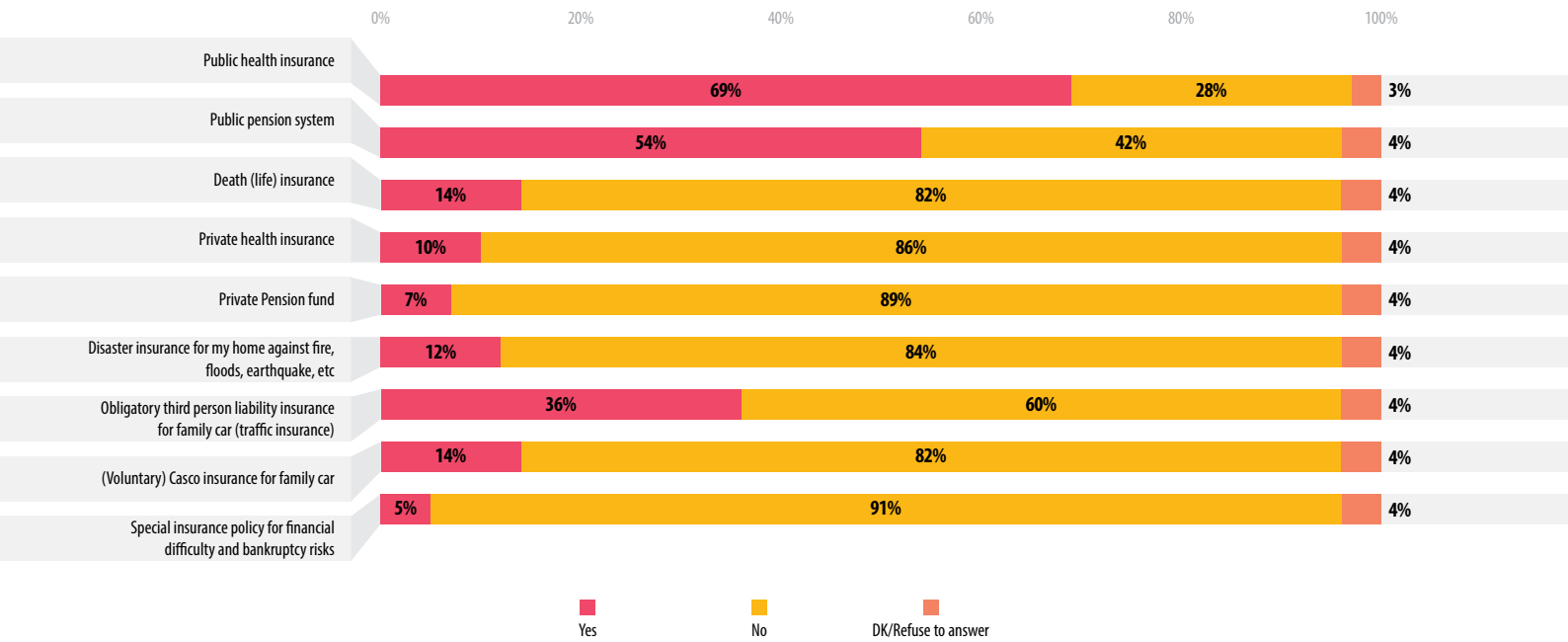
**Figure 31. Types of Insurance Policies Purchased Multiple Times**

29. Which types of insurance policy did you buy more than once in your life?

– Results for the Western Balkans region

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

(All respondents, N=6004, single answer, share of total, %)



The Western Balkan economies have an underdeveloped culture of private insurance coupled with heavy reliance on public systems, creating a potential fiscal time bomb for these economies. This situation, exacerbated by high emigration rates and an aging population, raises serious concerns about the long-term sustainability of public health and pension systems in the region.

A mere 14% of citizens have life insurance, indicating a lack of financial planning for unforeseen circumstances and leaving families vulnerable in case of the primary earner's death.

Only 10% opt for private health insurance, suggesting limited access to or awareness of its benefits, potentially leading to delayed healthcare and increased burdens on the public system.

A meagre 7% participate in private pension funds, highlighting a lack of retirement planning beyond state-provided pensions and potentially jeopardising financial security in old age.

With a mere 12% having disaster insurance, a significant portion of the population is financially exposed to natural disasters, potentially overwhelming economy resources in times of crisis.

The data reveals a stark contrast between private and public insurance coverage. 69% rely solely on public health insurance, indicating a heavy dependence on state-funded healthcare and limited individual responsibility for health expenses. 54% depend entirely on public pensions, highlighting the immense pressure on economy budgets to support a growing aging population with limited contributions from private retirement savings.

28% lack any health insurance, signifying a vulnerable group facing potential catastrophic health-care costs and limited access to essential medical services.

A staggering 42% lack pension coverage, indicating a large segment of population likely engaged in informal work, jeopardising their future financial security and increasing the likelihood of old-age poverty.

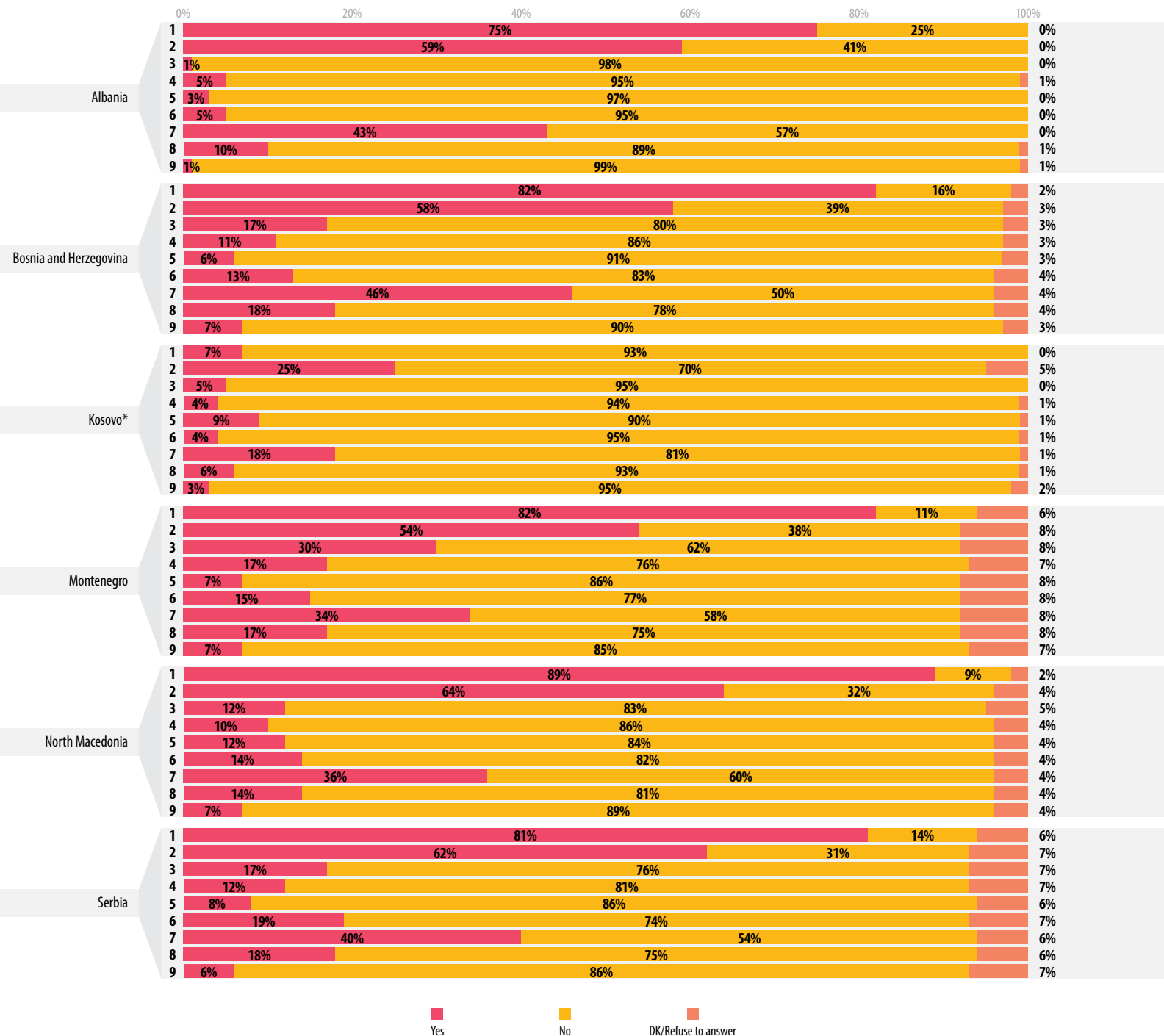
The convergence of these factors – low private insurance, overreliance on public systems, and a significant uninsured population – creates a perfect storm for Western Balkan economies already grappling with high emigration rates and population aging. Failing to address these challenges could lead to a fiscal crisis, jeopardising the well-being of citizens, hindering economic development, and potentially sparking social unrest.

Figure 32. Insurance Policies Purchased Multiple Times (Results based on the economies)

29. Which types of insurance policy did you buy more than once in your life? - Results for economies

1) Public health insurance; 2) Public pension system; 3) Death (life) insurance; 4) Private health insurance; 5) Private Pension fund; 6) Disaster insurance for my home against fire, floods, earthquake, etc. 7) Obligatory third person liability insurance for family car (traffic insurance); 8) (Voluntary) Casco insurance for family car; 9) Special insurance policy for financial difficulty and bankruptcy risks

(All respondents, N=6004, single answer, share of total, %)



Public health insurance and pension coverage reveals a stark contrast within the Western Balkans. Kosovo\* stands apart with significantly lower enrolment compared to other regional economies, highlighting potential vulnerabilities in its social safety net. Private insurance uptake remains universally low, further emphasizing the region's overall reliance on public systems, despite their potential fragility.

A mere 7% of Kosovo\* citizens are covered by public health insurance, a stark contrast to the rest of the region, where coverage ranges from 75% in Albania to 89% in North Macedonia. This disparity raises concerns about access to healthcare and potential financial hardship for a significant portion of Kosovo's\* population.

Similarly, only 25% of Kosovo\* citizens are enrolled in the public pension system, significantly lower than the 54% (Montenegro) to 64% (North Macedonia) range observed in other Western Balkan economies. This gap raises concerns about future old-age poverty and the long-term sustainability of Kosovo's\* social security system.

Across all categories of private insurance, uptake remains disappointingly low throughout the region. Albania records the lowest rate at 1%, while Montenegro leads with 30%. This indicates a widespread lack of financial planning for unforeseen circumstances and a potential burden on families in case of the primary earner's death.

Ranging from 5% in Albania to 17% in Montenegro, private health insurance remains an insignificant market, suggesting limited awareness, affordability issues, or lack of trust in private healthcare provisions.

Participation in private pension schemes is alarmingly low, ranging from 3% in Albania to 12% in North Macedonia. This lack of supplementary retirement savings raises concerns about future financial insecurity amongst retirees.

Despite the region's vulnerability to natural disasters, only 4% (lowest) of Kosovo\* and 19% (highest) of Serbia respondents have disaster insurance. This low uptake leaves a significant portion of the population financially exposed to catastrophic events.

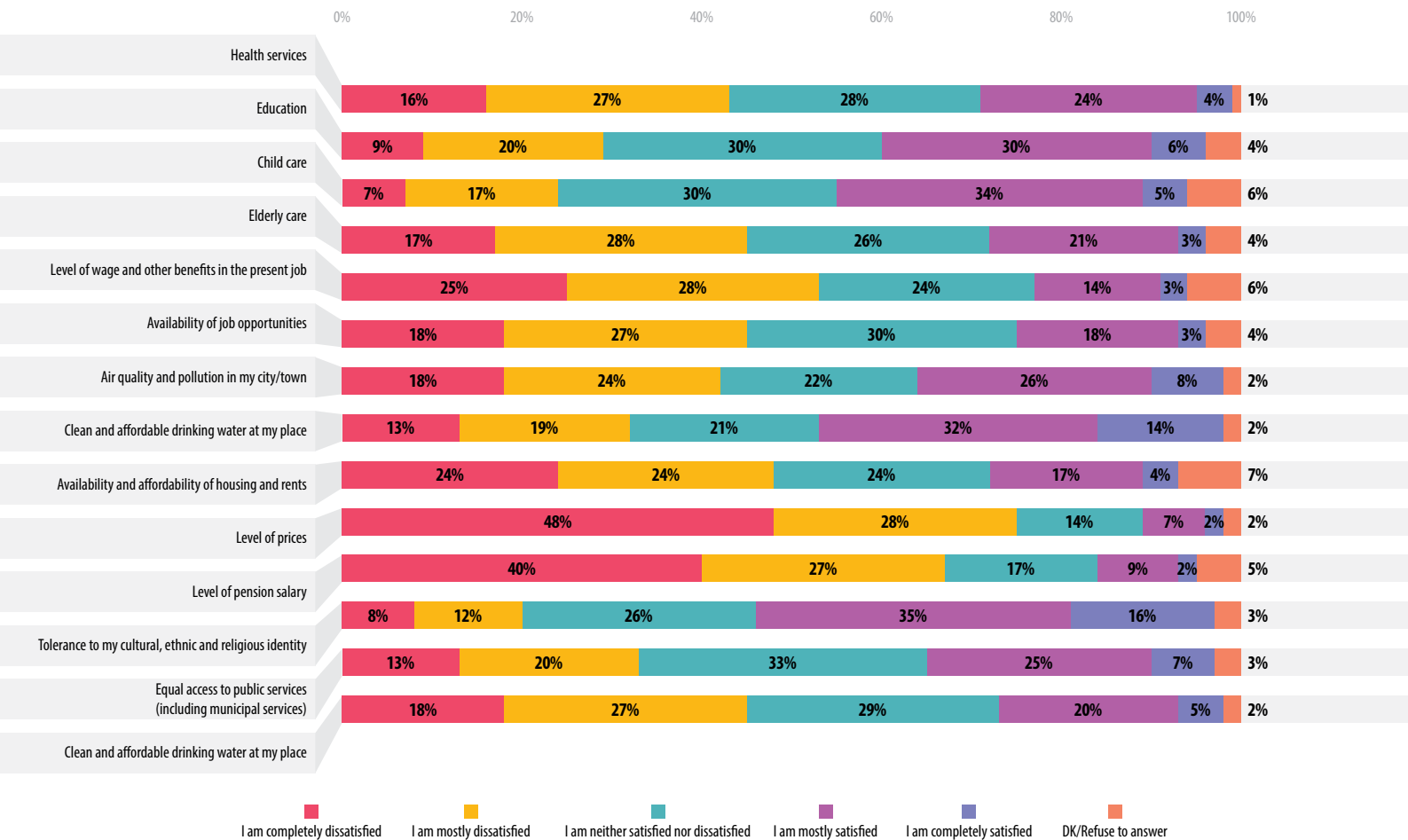
Interestingly, obligatory third-person car insurance alters the trend, with coverage ranging from 18% in Kosovo\* to 46% in Bosnia and Herzegovina. This higher uptake is likely driven by legal requirements for vehicle ownership rather than a proactive approach to risk management.

Addressing these challenges is crucial for building resilient and inclusive societies in the Western Balkans. By strengthening social safety nets, promoting responsible financial planning, and expanding insurance coverage, these economies can better protect their citizens from financial hardship, promote economic development, and ensure a more secure future for all.

**Figure 33. Satisfaction with Living Conditions: Results of the Western Balkans Region**

30. Could you please tell us how satisfied are you with each of the following in your place of living? – Results for the Western Balkans region

(All respondents, N=6004, single answer, scale from 1 to 5, share of total, %)



An in-depth analysis of citizen satisfaction across 14 key indicators reveals a pervasive sense of discontent across the Western Balkans. While satisfaction prevails in areas like education, childcare, and water quality, a starkly different picture emerges in crucial domains such as the economy, social welfare, and public services.

Deep-rooted dissatisfaction in the Western Balkans region is overwhelming and persisting in critical areas. The most pressing concern is the soaring cost of living, with a staggering 76% dissatisfied with price levels. This erodes purchasing power, fuels poverty, and creates widespread economic anxiety.

Dissatisfaction with pensions runs high at 67%, reflecting concerns about the adequacy and sustainability of retirement income, particularly given the region’s aging population.

53% are dissatisfied with wages and benefits, compared to a mere 17% satisfied, highlighting the need for decent work opportunities and improved labour market conditions.

Housing affordability and availability are major concerns, with 48% dissatisfied and only 21% satisfied, underscoring the need for affordable housing solutions and policies to curb speculation.



Dissatisfaction with healthcare services stands at 43%, revealing concerns about accessibility, quality, and affordability of these services.

45% express dissatisfaction with job opportunities, which is particularly concerning for youth and skilled workers, necessitating investments in job creation and skills development.

The significant proportion of respondents who are "neither satisfied nor dissatisfied" represents a crucial demographic. This group, often overlooked, may be experiencing apathy, resignation, or a lack of trust in institutions to address their concerns.

Despite the overall trend of dissatisfaction, some bright spots remain. With 36% satisfied compared to 29% dissatisfied, education emerges as a relative strength. A similar trend is observed in childcare, with 39% expressing satisfaction and 24% dissatisfaction, as well as access to clean water, with 46% satisfied versus 32% dissatisfied.

The region demonstrates a commendable level of tolerance towards cultural, ethnic, and religious diversity, with 51% expressing satisfaction and only 20% dissatisfaction.

**Table 13. Satisfaction with Living Conditions: Economic Results**

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

– Results for economies

1) Health services; 2) Education; 3) Child care; 4) Elderly care; 5) Level of wage and other benefits in the present job; 6) Availability of job opportunities; 7) Air quality and pollution in my city/town; 8) Clean and affordable drinking water at my place; 9) Availability and affordability of housing and rents; 10) Level of prices; 11) Level of pension salary; 12) Tolerance to my cultural, ethnic and religious identity; 13) Equal access to public services (including municipal services); 14) Quality of transport infrastructure (please take into consideration the overall transport: public transport, quality of roads, railways, airports)

(All respondents, N=6004, single answer, scale from 1 to 5, share of total, %)

		1	2	3	4	5	6	7	8	9	10	11	12	13	14
Albania	I am completely dissatisfied	17%	9%	7%	35%	45%	25%	26%	35%	47%	78%	78%	5%	15%	13%
	I am mostly dissatisfied	31%	25%	18%	39%	30%	26%	32%	39%	26%	21%	15%	4%	23%	30%
	I am neither satisfied nor dissatisfied	29%	32%	37%	18%	12%	27%	20%	15%	10%	2%	3%	15%	34%	34%
	I am mostly satisfied	20%	23%	23%	3%	3%	14%	18%	7%	1%	0%	0%	42%	21%	19%
	I am completely satisfied	1%	1%	2%	0%	0%	1%	4%	4%	0%	0%	0%	32%	3%	4%
	DK/Refuse to answer	1%	10%	13%	5%	10%	7%	0%	0%	15%	0%	5%	2%	3%	0%
Bosnia and Herzegovina	I am completely dissatisfied	14%	7%	5%	10%	20%	17%	13%	5%	11%	40%	32%	9%	11%	22%
	I am mostly dissatisfied	27%	18%	18%	24%	29%	29%	25%	11%	26%	32%	34%	13%	19%	33%
	I am neither satisfied nor dissatisfied	31%	31%	28%	31%	28%	30%	19%	20%	27%	16%	20%	27%	37%	27%
	I am mostly satisfied	25%	34%	38%	28%	15%	17%	30%	40%	26%	7%	9%	34%	25%	13%
	I am completely satisfied	3%	8%	7%	5%	4%	5%	11%	23%	6%	4%	3%	14%	5%	3%
	DK/Refuse to answer	1%	2%	3%	2%	3%	2%	2%	2%	3%	2%	3%	3%	3%	2%
Kosovo*	I am completely dissatisfied	12%	4%	5%	9%	17%	12%	8%	9%	12%	33%	30%	5%	10%	11%
	I am mostly dissatisfied	21%	15%	12%	29%	31%	28%	18%	19%	24%	33%	35%	12%	15%	22%
	I am neither satisfied nor dissatisfied	33%	39%	36%	37%	33%	36%	32%	32%	36%	23%	22%	34%	37%	35%
	I am mostly satisfied	28%	37%	44%	23%	17%	20%	33%	31%	24%	10%	12%	33%	26%	25%
	I am completely satisfied	6%	5%	3%	2%	2%	3%	9%	8%	4%	1%	1%	16%	11%	7%
	DK/Refuse to answer	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

		1	2	3	4	5	6	7	8	9	10	11	12	13	14
Montenegro	I am completely dissatisfied	16%	13%	8%	12%	17%	17%	16%	7%	19%	44%	25%	11%	14%	21%
	I am mostly dissatisfied	28%	19%	17%	23%	26%	25%	22%	12%	23%	29%	21%	14%	18%	27%
	I am neither satisfied nor dissatisfied	23%	28%	26%	25%	26%	29%	22%	18%	27%	13%	27%	28%	31%	27%
	I am mostly satisfied	24%	30%	35%	28%	21%	18%	26%	39%	19%	7%	15%	31%	26%	18%
	I am completely satisfied	6%	7%	9%	6%	4%	5%	10%	22%	5%	3%	4%	11%	8%	4%
	DK/Refuse to answer	2%	3%	4%	5%	6%	5%	4%	3%	7%	4%	8%	5%	4%	4%
North Macedonia	I am completely dissatisfied	19%	14%	10%	24%	32%	23%	22%	9%	37%	54%	47%	11%	16%	24%
	I am mostly dissatisfied	31%	25%	20%	28%	25%	26%	21%	15%	24%	26%	26%	16%	23%	29%
	I am neither satisfied nor dissatisfied	25%	26%	28%	21%	20%	28%	21%	22%	18%	11%	12%	28%	29%	23%
	I am mostly satisfied	20%	25%	28%	18%	11%	17%	28%	41%	9%	7%	8%	36%	25%	20%
	I am completely satisfied	4%	5%	4%	3%	3%	2%	8%	12%	2%	2%	2%	6%	5%	3%
	DK/Refuse to answer	0%	6%	10%	7%	9%	4%	1%	1%	8%	1%	5%	2%	2%	1%
Serbia	I am completely dissatisfied	15%	9%	9%	13%	20%	14%	24%	15%	15%	38%	31%	7%	12%	14%
	I am mostly dissatisfied	25%	21%	20%	27%	29%	27%	28%	15%	21%	30%	29%	11%	21%	24%
	I am neither satisfied nor dissatisfied	26%	23%	23%	25%	24%	27%	18%	18%	26%	17%	18%	24%	27%	26%
	I am mostly satisfied	27%	34%	35%	26%	16%	22%	20%	35%	22%	8%	10%	34%	26%	25%
	I am completely satisfied	4%	7%	8%	5%	5%	4%	6%	13%	7%	3%	3%	18%	9%	7%
	DK/Refuse to answer	3%	5%	5%	5%	6%	6%	4%	4%	8%	4%	8%	5%	5%	4%

Analysing citizen satisfaction across the Western Balkans reveals a region grappling with discontent, with Albania emerging as a particularly concerning outlier. While dissatisfaction persists across various indicators region-wide, Albanian citizens express unprecedented levels of discontent, signalling a potential crisis of confidence in institutions.

The data paints a bleak picture of citizen satisfaction in Albania. Dissatisfaction with price levels reaches a staggering 99%, while dissatisfaction with wages hits 93%, reflecting a deep economic crisis and a perceived inability of authorities to address the cost-of-living crisis.

Discontent extends beyond the economy, with overwhelming dissatisfaction (around 75%) in areas such as housing, wages, clean water, and elderly care, highlighting a perceived failure to provide basic social welfare and essential services.

While other economies report satisfaction with water quality, Albania stands out with 74% dissatisfied, raising concerns about infrastructure, sanitation, and potential public health risks.

The only bright spot is the high level of tolerance towards ethnic and religious diversity, with 74% satisfied, suggesting strong social cohesion despite economic hardship.

While less dramatic than Albania, other Western Balkan economies also exhibit concerning levels of dissatisfaction with North Macedonia being the second most dissatisfied economy.

Dissatisfaction with prices remains high across the region, ranging from 99% in Albania to 66% in Kosovo\*. Similarly, dissatisfaction with pensions is widespread, with Albania at 93% and even the lowest, Montenegro, at a concerning 46%.

Dissatisfaction with job opportunities remains a significant concern, ranging from 51% in Albania to 40% in Kosovo\*. Similarly, dissatisfaction with wages is high, ranging from 75% in Albania to 43% in Montenegro.

Dissatisfaction with healthcare (50% in North Macedonia to 33% in Kosovo\*), housing (73% in Albania to 36% in Kosovo\* and in Serbia), and transportation quality (55% in Bosnia and Herzegovina to 33% in Kosovo\*) is evident across the region, highlighting the need for improved public service delivery and infrastructure development.

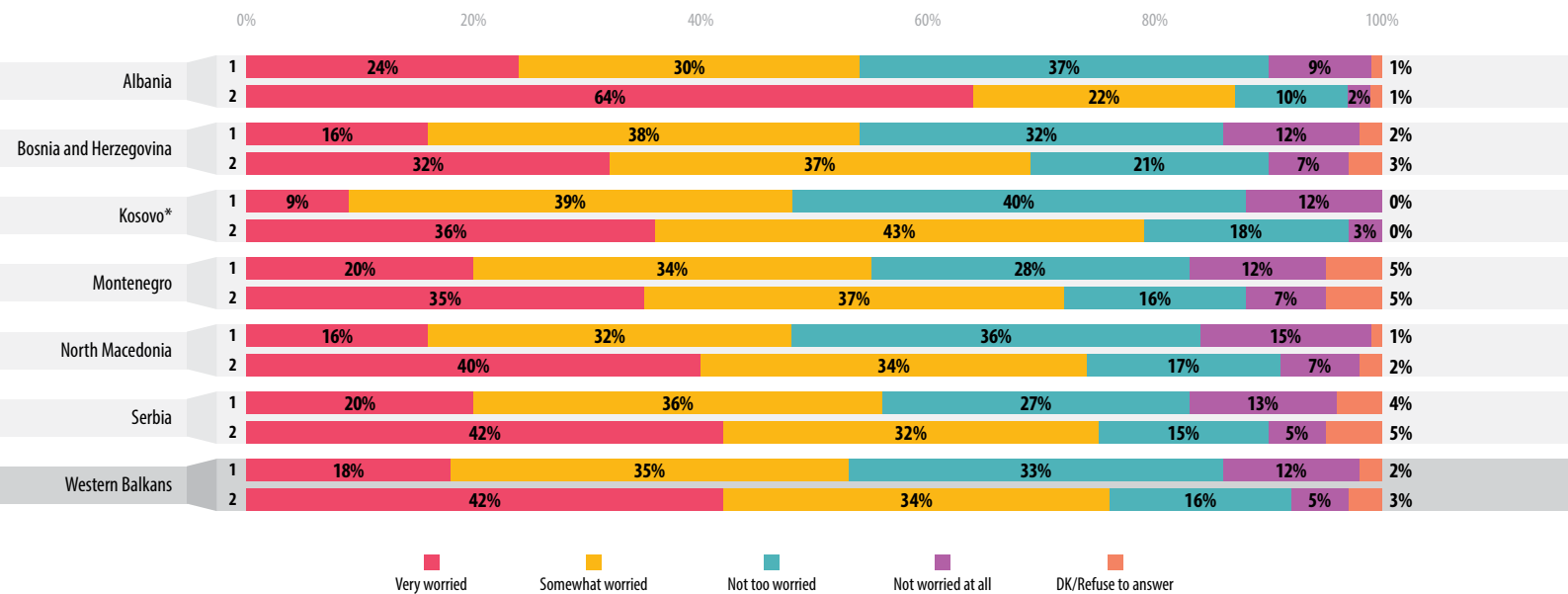
Citizens of the Western Balkan economies are more satisfied than dissatisfied in the areas of child care, quality of water (except Albania), education (except Albania and North Macedonia), tolerance to ethnic and religious identity, and equal access to public services (except Albania and North Macedonia).

**Figure 34. Concern about Paying Medical Costs Given Current Financial Situation**

31. Please tell me how worried or not you are right now about not being able to pay medical costs in each of the following situations, based on your current financial situation?

1) For routine healthcare and medication; 2) For healthcare and medication in the event of a serious illness or accident

(All respondents, N=6004, single answer, scale from 1 to 4, share of total, %)



A pervasive sense of anxiety about healthcare affordability squeezes the Western Balkans, with a majority expressing concerns about their ability to manage even routine medical expenses. This widespread fear, coupled with even greater apprehension about affording treatment for serious illnesses, highlights a pressing need to address healthcare financing and accessibility across the region.

A concerning 53% of respondents across the region worry about affording routine healthcare and medications, indicating potential barriers to accessing even basic medical services.

This anxiety escalates when considering serious illnesses or accidents, with a staggering 76% worried about affording necessary medication and treatment. This highlights the potential for catastrophic healthcare expenses to devastate families and push them into poverty.

While healthcare insecurity is widespread, a slight majority (52%) in Kosovo\* and (51%) in North Macedonia express confidence in affording routine healthcare, suggesting relatively better access or affordability compared to other regional counterparts.

The remaining Western Balkan economies paint a more concerning picture.

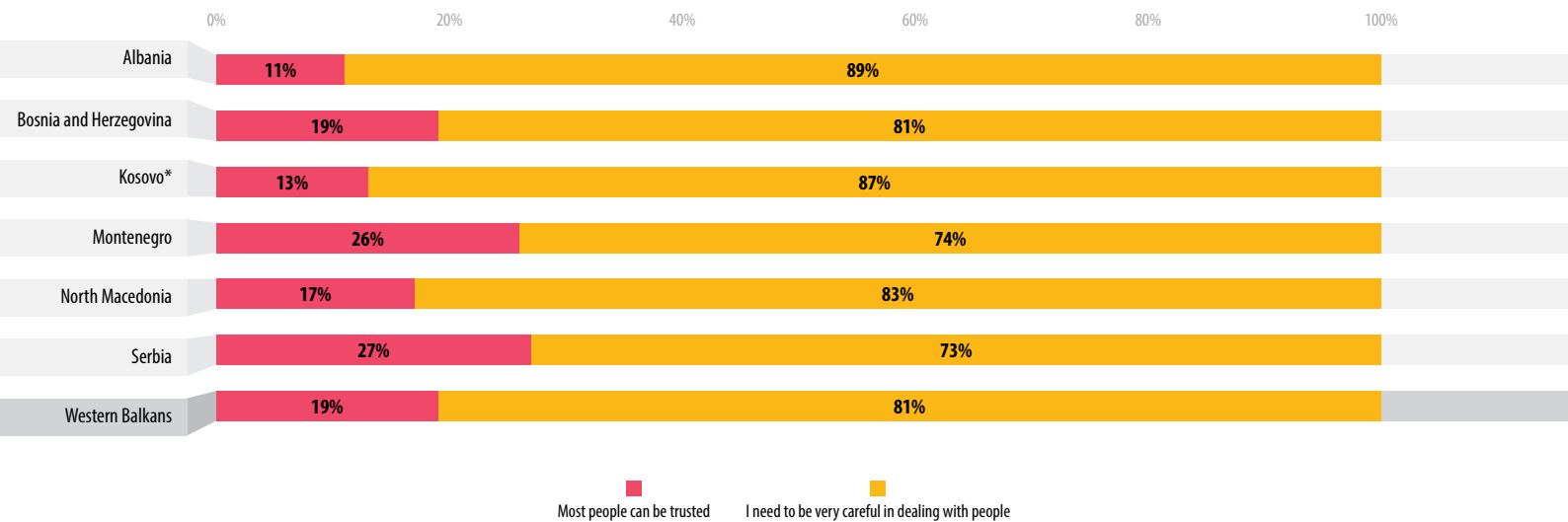
54% of citizens in these economies express concerns about affording routine healthcare, highlighting potential barriers to seeking timely medical attention and risking more severe health consequences.

# CHAPTER F: PERSONAL TRUST AND TRUST IN INSTITUTIONS

**Figure 35. Trust in People: Can Most Be Trusted or Is Caution Needed?**

32. Generally speaking, would you say that most people can be trusted or that you need to be very careful in dealing with people?

(All respondents, N=6004, single answer, share of total, %)



During the last decades, social scientists have accumulated growing evidence showing that social trust and trust in political institutions (political trust hereafter) are substantively important outcomes. Higher social trust has been associated, amongst other things, “with pro-social behaviours, economic growth, more efficient markets, stronger democracies, and lower crime rates.” (Bargsted, 2023) Mutual trust stimulates social interaction, solidarity, cooperation and community spirit, decreases the need for formalities, and tends to prevent conflicts and legal processes. At the individual level, trustful individuals tend to be happier, healthier, more tolerant to social diversity, and participate more in voluntary associations. (Ibid.) Trust is the core of social capital, the necessary ‘capital’ to enable societies to function well. In principle, trust is necessary for the successful dissemination of knowledge, for nearly any form of deliberation and planning that requires us to make use of more information than we are able to gather individually and verify ourselves. The lack of trust in others, in government and in institutions, prevents the implementation of public policies.

Western Balkan respondents have very low levels of trust in their compatriots. Respondents from Albania and Kosovo (11 and 13% respectively) are least likely to say that most people can be trust-

ed. Although the ones from Montenegro and Serbia (26 and 26% respectively) trust most people, in these two economies vast majorities still believe that you need to be very careful in dealing with people. The region seems to be a low-trust society, one where interpersonal trust is relatively low, and shared ethical values are lacking. There were no significant differences taking into consideration age, gender or educational background.

Eurostat published survey measures trust in others where respondents answered the survey question "would you say that most people can be trusted?" on a scale from 0 (low trust) to 10 (high trust). Different surveys were made since 2013, some including Western Balkan economies. In 2023, trust was highest in Finland, and Romania with ranks of 7.3 and 7.2 respectively. The lowest trust was observed in Cyprus 3.6. and Lithuania 4.3. In 2022 when the survey covered Serbia and Montenegro, they scored 5.6 and 5.7 respectively. Although amongst the least trustful economies in the survey, Serbia's trust that year was the same as Sweden's and Montenegro's was the same as Estonia's. In 2021 Albania scored 5.3, while in 2018 North Macedonia scored 5.3, and Kosovo\* 5.1. Albania's trust in 2021 was bigger than Malta's and Hungary's (both 5.1), while in 2018 North Macedonia's trust was bigger than Portugal's and Kosovo's\* trust was higher than Hungary's. A higher rating of trust in others amongst individuals with tertiary education was observed in all EU economies without exception in the Eurostat survey.

**Figure 36. Trust in Different Groups (Results for Western Balkans Region)**

33. I'd like to ask you how much you trust people from various groups. Could you tell me for each whether you trust people from this group completely, somewhat, now very much or not at all?

– Results for the Western Balkans region

1) Your family; 2) Your neighbourhood; 3) People you know personally; 4) People who work in administration but whom you do not know in person; 5) People you meet for the first time; 6) People of another religion; 7) People of another nationality.

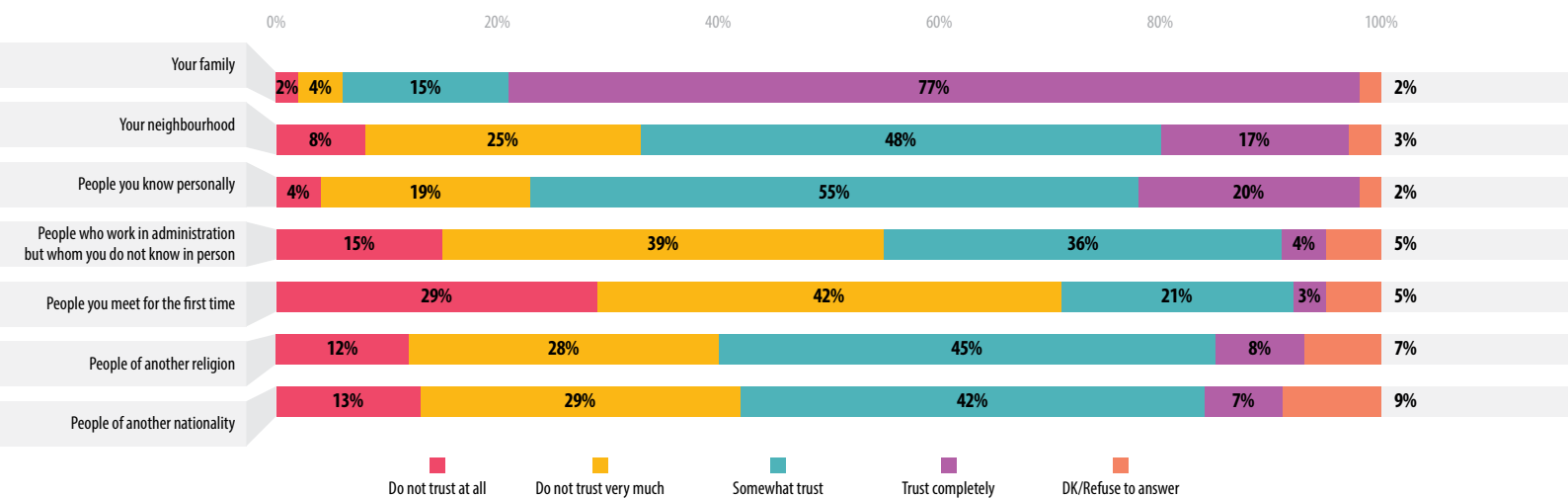


Figure 37. Trust Levels in Various Groups (Results for economies)

33. I'd like to ask you how much you trust people from various groups. Could you tell me for each whether you trust people from this group completely, somewhat, now very much or not at all? – Results for economies

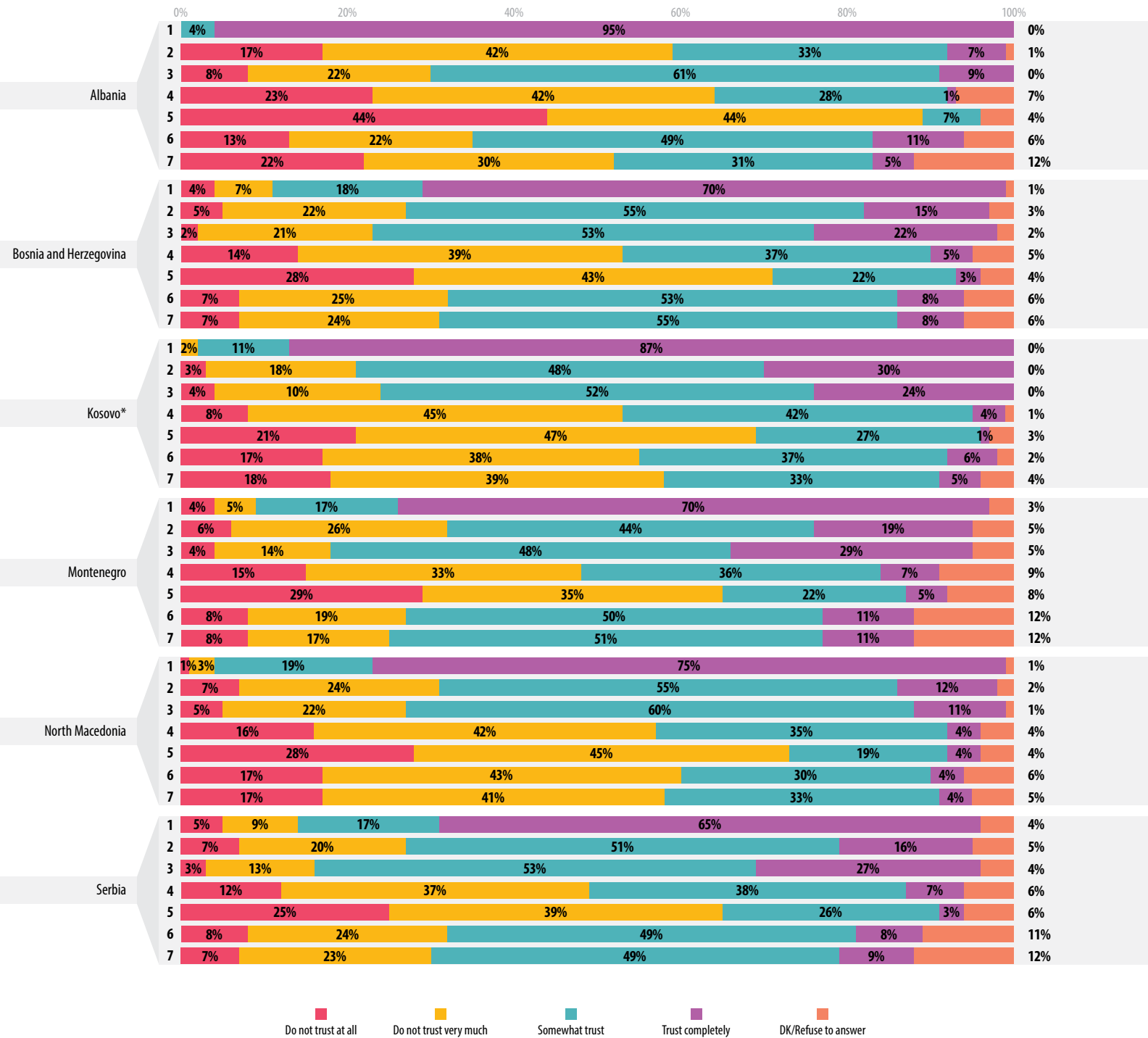


Table 14. Trust in Various Groups of People SecuriMeter 2024 and EVS/WVS (2022)

Somewhat or complete trust in (in %)	WB	Albania	Bosnia & Herzegovina	Kosovo*	Montenegro	North Macedonia	Serbia
<b>1) Your family</b>	<b>92</b>	99	88	98	87	94	82
EVS/WVS	<b>99</b>	99	99		98	98	99
Difference SecuriMeter-EVS/WVS	<b>-7</b>	0	-10		-11	-4	-17
<b>2) Your neighbourhood</b>	<b>65</b>	40	70	78	63	67	67
EVS/WVS	<b>73</b>	70	69		82	77	66
Difference SecuriMeter-EVS/WVS	<b>-8</b>	-30	1		-19	-10	1
<b>3) People you know personally</b>	<b>75</b>	70	75	76	77	71	80
EVS/WVS	<b>81</b>	87	75		78	82	81
Difference SecuriMeter-EVS/WVS	<b>-6</b>	-17	0		-1	-11	-1
<b>4) People who work in administration but whom you do not know in person</b>	<b>40</b>	29	42	46	43	39	45
<b>5) People you meet for the first time</b>	<b>24</b>	7	25	28	27	23	29
EVS/WVS	<b>24</b>	9	23		35	27	28
Difference SecuriMeter-EVS/WVS	<b>0</b>	-2	2		-8	-4	1
<b>6) People of another religion</b>	<b>53</b>	60	61	43	61	34	57
EVS/WVS	<b>47</b>	45	52		46	46	48
Difference SecuriMeter-EVS/WVS	<b>6</b>	15	9		15	-12	9
<b>7) People of another nationality</b>	<b>49</b>	36	63	38	62	37	58
EVS/WVS	<b>46</b>	38	51		43	47	49
Difference SecuriMeter-EVS/WVS	<b>3</b>	-2	12		19	-10	9

Western Balkan respondents have very high levels of trust in their family members (average for the region being 92% complete and somewhat trust); people from their neighbourhood (65%); and those they know personally (75%). There is good average level of trust in the region in people of another religion (53%); and people of another nationality (49%). The lowest levels of trust are in people who work in administration but whom you do not know in person (40%); and people you meet for the first time (24%).

There are significant differences for specific economies in the level of trust in certain categories of people. As an exception from the region, Albania records little trust in people in their neighbourhood (40%), and in people who work in administration but whom you do not know in person (29%), much less than the region's average of 40%, and in people you meet for the first time (7%), again much less than the region's average of 24%. In Albania, North Macedonia and Kosovo\* respondents tend not to trust people of another nationality (36%, 37% and 38% respectively), much less than the regional average of 49%. Here it is important to understand whether respondents understood the term "people of another nationality" as people being of different ethnicity or citizenship. If it is the later, then it seems that in the three economies there is little trust in interaction with foreigners.

Furthermore, in North Macedonia, there is little trust in people of another religion (34%), much less than the region's average of 53%. This could be an indicator that in this economy the majority Orthodox Christians and the minority Islamic community have not much trust in each other. Similarly, interviewees from Kosovo\* have less trust in people of another religion than the region's average (43% compared to 53%) indicating similar mistrust between the dominant Muslims and minority Orthodox believers in the economy. Such an issue does not exist in Albania and Bosnia



and Herzegovina that are also multi-confessional economies where in the later religious affiliation corresponds largely with different ethnicity. Public officials and religious authorities in North Macedonia and Kosovo\* should work on enhancing dialogue and improving trust between the different communities.

To compare the results of SecuriMeter 2024 we crosschecked them with the results of the joint European Values Study and World Values Survey EVS/WVS (2022). There are no results for Kosovo\* in these surveys and there is no question about trust in people who work in administration but whom you do not know in person in the EVS/WVS. On average, the results of the two surveys are similar. The biggest difference observed relates to the questions about trust in your neighbourhood, where SecuriMeter has a score of 65% and EVS/WVS a score of 73%. There are important differences regarding specific questions and given economies. Thus, the difference regarding the same question for Albania is 30% (40-70%). In EVS/WVS, respondents from Albania have trust in their neighbours in the big majority. Similarly, for the same economy there is a gap between the two surveys regarding trust in people you know personally – in EVS/WVS respondents from Albania have more trust in people they know personally (70-87%). On the other hand, they have more trust in people of another religion according to SecuriMeter than EVS/WVS (60-45%). Similarly, BiH respondents have more trust in people of another religion according to SecuriMeter than EVS/WVS (61-52%), and have more trust in people of another nationality (63-51%). Montenegro respondents have more trust in people of another religion according to SecuriMeter than EVS/WVS (61-46%), and have more trust in people of another nationality (62-43%). The ones from Serbia also have more trust in people of another religion according to SecuriMeter than EVS/WVS (57-48%), and have more trust in people of another nationality (58-49%).

On the other hand, respondents of North Macedonia have less trust in people of another religion according to SecuriMeter than EVS/WVS (34-46%) and have less trust in people of another nationality according to SecuriMeter than EVS/WVS (37-47%). More importantly, according to EVS/WVS data on these two questions, North Macedonia is ranked very similarly to the other regional economies, disputing the previous interpretation of religious distance between the two communities in the economy and also does not question attitudes towards foreigners. However, Albanian trust in people of another nationality is low also in the EVS/WVS survey again raising the question of little trust in interaction with foreigners. Furthermore, BiH, Montenegro and Serbia respondents have more trust in their family according to EVS/WVS (10%, 11% and 17% more respectively). Respondents from Montenegro and North Macedonia have more trust in their neighbours under EVS/WVS (19% and 10% more respectively). Respondents from Albania and North Macedonia have more trust in people they know personally under EVS/WVS (17% and 11% more, respectively).

**Figure 38. Confidence in Organisations: Levels of Trust in the Western Balkans Region**

34. I am going to name a number of organisations. For each one, could you tell how much confidence you have or not: is it a great deal of confidence, quite a lot of confidence, not very much confidence or none at all? – Results for the Western Balkans region

(All respondents, N=6004, single answer, scale from 1 to 4, share of total, %)



**Table 15. Confidence in Organisations: Levels of Trust in each Economy of the Western Balkans Region**

34. I am going to name a number of organisations. For each one, could you tell how much confidence you have or not? – Results for economies 1) The religious organisations (churches/ mosques); 2) The armed forces; 3) The press; 4) Television; 5) Social media/Facebook/Twitter; 6) Labour unions; 7) The police; 8) The courts; 9) The government; 10) Political parties; 11) Parliament; 12) The civil service; 13) Universities; 14) State Election Commission and other agencies/ institutions responsible for elections; 15) Major companies; 16) Banks; 17) The European Union; 18) NATO

(All respondents, N=6004, single answer, scale from 1 to 4, share of total, %)

	Confidence	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Albania	None at all	12%	8%	29%	23%	58%	52%	10%	35%	33%	51%	48%	18%	9%	31%	30%	18%	2%	1%
	Not very much	33%	22%	45%	46%	26%	19%	32%	33%	30%	41%	37%	33%	22%	36%	37%	30%	12%	4%
	Quite a lot	38%	47%	22%	28%	10%	5%	46%	18%	32%	5%	14%	40%	39%	20%	21%	34%	43%	41%
	A great deal	13%	16%	2%	3%	0%	1%	11%	4%	5%	1%	1%	3%	7%	4%	2%	11%	43%	53%
	DK/Refuse	4%	7%	2%	0%	6%	23%	0%	10%	0%	1%	1%	6%	23%	9%	10%	7%	0%	2%
Bosnia and Herzegovina	None at all	11%	11%	30%	25%	32%	23%	8%	18%	31%	51%	36%	24%	12%	35%	18%	14%	20%	29%
	Not very much	30%	35%	50%	49%	48%	47%	34%	47%	40%	32%	40%	44%	33%	42%	47%	37%	33%	25%
	Quite a lot	40%	37%	11%	17%	11%	16%	42%	24%	18%	8%	13%	22%	40%	13%	25%	37%	34%	28%
	A great deal	15%	11%	5%	6%	4%	4%	11%	6%	6%	4%	5%	4%	9%	5%	5%	7%	9%	13%
	DK/Refuse	4%	5%	5%	4%	5%	9%	4%	5%	5%	5%	5%	5%	7%	5%	5%	4%	5%	5%
Kosovo*	None at all	2%	8%	17%	13%	22%	16%	6%	14%	12%	24%	26%	18%	3%	11%	11%	6%	5%	3%
	Not very much	9%	24%	48%	40%	52%	42%	23%	45%	42%	51%	41%	34%	24%	41%	45%	42%	21%	5%
	Quite a lot	39%	44%	22%	36%	22%	24%	47%	29%	34%	22%	28%	37%	54%	29%	30%	43%	54%	29%
	A great deal	48%	23%	6%	10%	2%	10%	23%	7%	11%	2%	4%	11%	16%	13%	7%	6%	19%	63%
	DK/Refuse	2%	0%	6%	1%	2%	8%	0%	6%	1%	1%	1%	1%	3%	5%	7%	3%	1%	1%
Montenegro	None at all	16%	16%	31%	27%	34%	24%	14%	19%	24%	39%	29%	21%	11%	28%	21%	19%	18%	29%
	Not very much	24%	33%	42%	42%	41%	43%	34%	36%	38%	37%	38%	39%	31%	37%	42%	37%	25%	25%
	Quite a lot	35%	33%	16%	21%	13%	21%	37%	31%	24%	13%	20%	28%	41%	22%	23%	30%	30%	23%
	A great deal	19%	8%	4%	5%	4%	4%	10%	8%	5%	3%	5%	5%	8%	3%	4%	7%	19%	14%
	DK/Refuse	6%	10%	8%	6%	8%	8%	6%	6%	8%	7%	8%	8%	10%	10%	10%	7%	8%	8%
North Macedonia	None at all	7%	7%	14%	12%	20%	25%	15%	42%	36%	39%	37%	19%	12%	25%	16%	13%	17%	18%
	Not very much	23%	21%	41%	42%	41%	35%	30%	33%	30%	35%	32%	38%	27%	34%	34%	35%	24%	24%
	Quite a lot	42%	47%	25%	37%	22%	23%	41%	16%	21%	17%	22%	35%	42%	29%	34%	40%	38%	37%
	A great deal	25%	19%	5%	6%	6%	5%	11%	4%	6%	4%	4%	5%	8%	5%	7%	8%	17%	16%
	DK/Refuse	3%	6%	15%	4%	11%	12%	3%	4%	7%	4%	5%	4%	12%	7%	9%	4%	5%	5%
Serbia	None at all	14%	15%	40%	35%	33%	28%	17%	23%	30%	43%	36%	23%	9%	34%	21%	23%	34%	63%
	Not very much	30%	31%	37%	41%	45%	42%	32%	39%	30%	35%	33%	38%	28%	28%	42%	40%	37%	21%
	Quite a lot	34%	32%	12%	15%	10%	15%	32%	25%	24%	10%	17%	24%	41%	21%	22%	24%	16%	6%
	A great deal	15%	12%	5%	3%	3%	4%	12%	7%	9%	5%	7%	7%	13%	9%	5%	6%	5%	2%
	DK/Refuse	7%	9%	7%	6%	10%	12%	6%	7%	6%	7%	7%	7%	9%	8%	10%	7%	8%	7%

Trust in various institutions of society from the press to political parties and labour unions is low in the Western Balkans in general and in economies. There are few exceptions where majority respondents have trust: religious organisations (60% a great deal and quite a trust); armed forces (55%); police (54%); universities (53%); European Union (55%) and NATO (54%). Regionally, there is least trust in political parties (80% have none at all or not very much), social media (75%), parliament (72%), the press (71%), and television (65%), although there is more than 50% distrust in all other institutions.

There are, however, significant differences amongst the economies of the region. In Albania, Kosovo\* and North Macedonia the average trust in the mentioned six organisations in which respondents have more than 50% trust, i.e. answers "Quite a lot," and "A great deal", is 66%, 76.5% and 57% respectively. Much less average trust is recorded in the economies of Bosnia and Herzegovina (48%), Montenegro (46%), and Serbia (37%). Moreover, in Kosovo\* and North Macedonia the average trust in listed institutions, i.e. answers "Quite a lot," and "A great deal", is 50% and 41%

respectively. Much less average trust is seen in the economies of Albania (38%), Bosnia and Herzegovina (31%), Montenegro (33%), and Serbia (28%). This means that institutional trust is highest in Kosovo\*, followed by North Macedonia and Albania. Respondents from Bosnia and Herzegovina, Montenegro, and Serbia have least trust in the societal institutions/organisations listed in Question 34. The levels of trust in these economies is worryingly low.

Table 16. Trust in different organisations (Question 34)

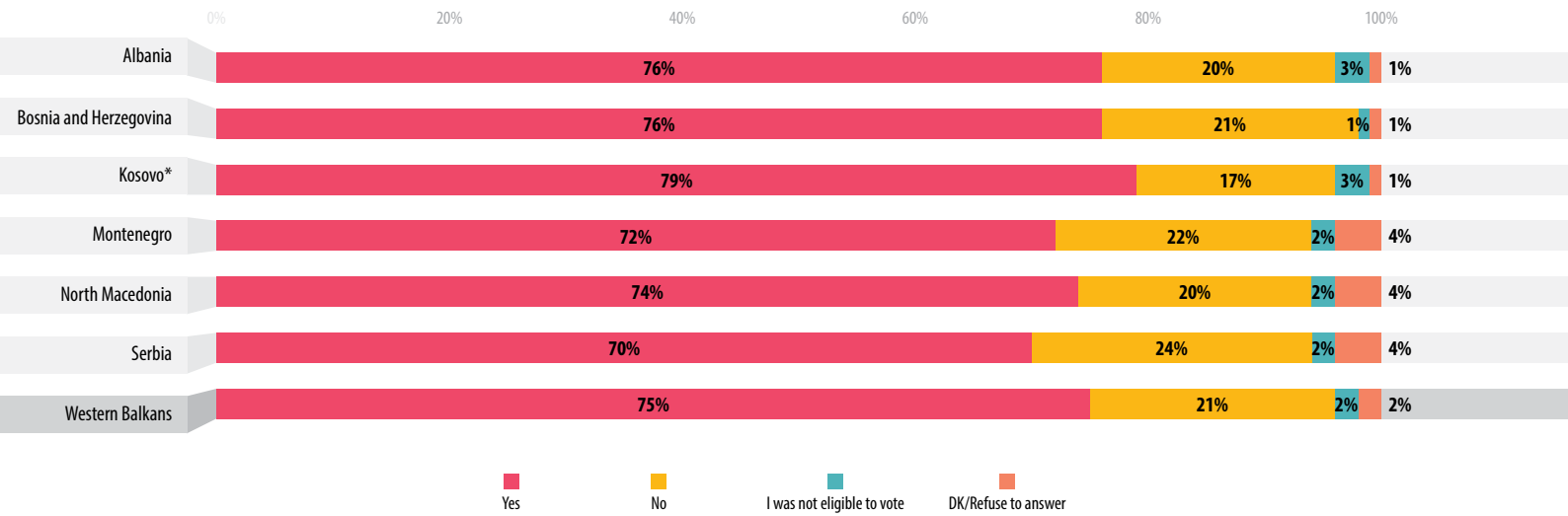
Level of trust	Albania	Bosnia and Herzegovina	Kosovo*	Montenegro	North Macedonia	Serbia
Average % of answers for all 18 organisations:						
Quite a lot	38%	31%	50%	33%	41%	28%
A great deal						
Average % of answers for six organisations that have highest trust regionally:						
Quite a lot	66%	48%	76%	46%	57%	37%
A great deal						

There are other individual specifics. In Albania, trust in universities is below the regional average (46% compared to 53%). This might indicate not that adequate level of higher education in the economy as in other economies of the Western Balkans. In Bosnia and Herzegovina trust in the armed forces and universities is lower than the average for the region (48%-55% and 49%-53% respectively). In Albania and Kosovo\* trust in EU and NATO is much higher than the regional averages (86-55% and 73%-55% for EU and 94-54% and 92-54% for NATO). On the other side, trust in EU and NATO is much lower than the regional averages in Bosnia and Herzegovina and Montenegro (43-55% and 49-55% for EU and 41-54% and 37%-54% for NATO). In Serbia the level of trust in these institutions is lowest in the region, 21% for EU and 8% for NATO. In North Macedonia there is a good level of trust, but barely a majority, 55% for EU and 53% for NATO. Except in Albania and Kosovo\*, and partially North Macedonia these results do not bring confidence that further reforms in the Euro-Atlantic process will be easily implemented and accepted by the citizens in the region.

Furthermore, in Kosovo\* trust in all six organisations is much higher than the regional averages, while in Serbia it is much lower, except the trust in universities. In Bosnia and Herzegovina and Montenegro, trust is marginally lower than the regional averages. The results from the EVS/WVS are similar on the question about trust in regional institutions, except in Montenegro where the discrepancy is 24% (SecuriMeter trust 56%-EVS/WVS 80%). The results from EVS/WVS are comparable on the question about trust in armed forces, except in Montenegro where the discrepancy is 16% (SecuriMeter trust 41%-EVS/WVS 57%) and in Serbia where it is 17% (SecuriMeter trust 44%-EVS/WVS 61%). The results from EVS/WVS are similar on the question about trust in EU except in Albania where the discrepancy is 16% (SecuriMeter trust 86%-EVS/WVS 70%). There is no question in EVS/WVS about trust in universities and NATO.

**Figure 39. Voter Participation in Recent Elections**

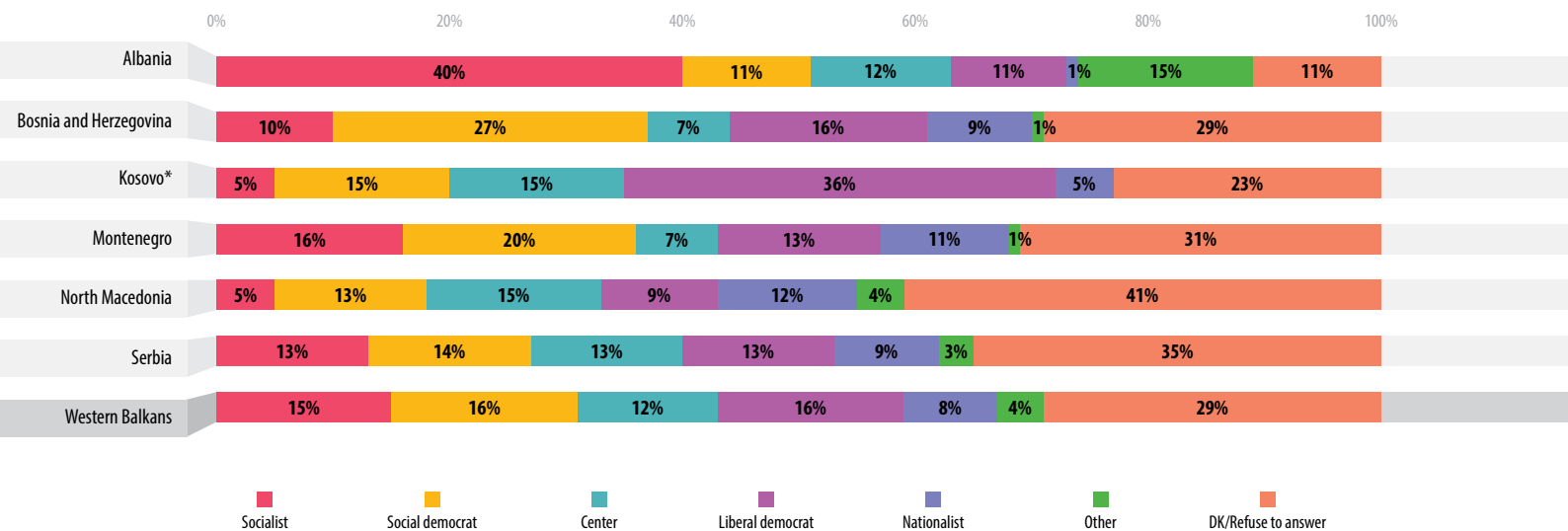
35. Did you vote in the last either local or national elections?  
(All respondents, N=6004, single answer, share of total, %)



In great majorities, respondents have said that they had voted at the last elections in their economy. The percentages are much higher than the turnout at the last elections in the region, Albania in 2021 (46.29%), Bosnia and Herzegovina in 2022 (51.45%), Kosovo\* in 2021 (48.78%), Montenegro in 2023 (56.28%), North Macedonia in 2024 (55.44%), Serbia in 2023 (58.77%). Although for years there have been debates on the issue of the validity of electoral rolls, i.e. whether turnout at elections reflects the residents or citizens of the economies, the discrepancies between respondents that said they have voted and the official turnouts in the economies of the region are very high, in some economies almost 30% (Kosovo\*).

**Figure 40. Description of Political Views**

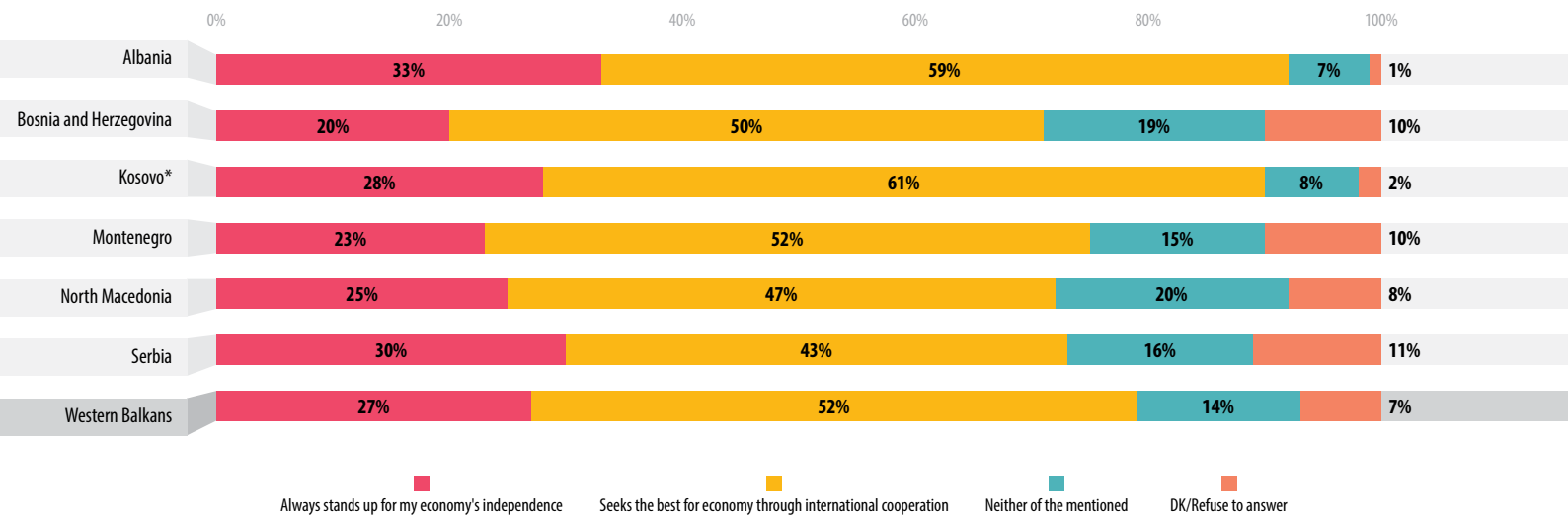
36. In general, how would you describe your political views?  
(All respondents, N=6004, single answer, share of total, %)



Overall leftist, 31%, dominate right wing forces, 24%, with 12% in the centre, especially in Albania 51-12%, Bosnia and Herzegovina 37-25%, Montenegro 36-24%, and Serbia 27-22%. In Kosovo\* and North Macedonia supposedly the right-wing respondents dominate, or have a slight majority (20%-41%, and 18%-21% respectively). However, the results of the recent elections in Montenegro, North Macedonia and Serbia were completely different than these projected political views. In all three economies of the region the right wing took decisive victories at parliamentary and presidential elections. In the latest election in North Macedonia, the right wing presidential candidate won with 69% against the incumbent left wing president while at the parliamentary elections the main opposition right wing parties won 45% against 16% of the incumbent left wing party. However, one should consider that many respondents in the economy have refused to answer the question about their political views (41%), the most significant percentage amongst Western Balkan economies.

**Figure 41. Qualities of a Good Leader**

37. In your opinion, a good leader of your economy is one who.....?  
(All respondents, N=6004, single answer, share of total, %)



According to SecuriMeter Question 37, Western Balkan respondents as a whole and as individual economies prefer leaders who seek best interest for their economy through international cooperation than through national/sovereignist agenda. These survey results are similar to the multi-country global survey by the European Council on Foreign Relations (ECFR) in cooperation with Oxford University's Europe in a Changing World project where respondents also generally perceived seeking international cooperation to be key to a good leader.<sup>75</sup> In the ECFR survey, Europeans and South Koreans stand out as expressing the strongest preference for international cooperation.

75 Timothy Garton Ash, Ivan Krastev, Mark Leonard, "Living in an à la carte world: What European policymakers should learn from global public opinion," ECFR, Policy Brief 15 November 2023.

# CHAPTER G: CORRUPTION

This section has sought to obtain the opinion of the citizens of the region on the problem of corruption in each of the economies. The questions have focused on the level of corruption, corruption trends in the last three years, and experiences of citizens with bribe giving in the respective economies during their interactions with relevant public and private institutions.

Measuring public opinion perceptions of and attitudes on corruption has become particularly relevant for the Western Balkans. Corruption remains an acute problem in the region that has long contributed to undermining the efforts of all economies of the region to make economic and social progress and to consolidate democracy. In this respect, the lack of effectiveness in the fight against corruption has become an impediment for the EU accession process, while the progress in EU accession process has been long considered to be a driver of the necessary reforms to tackle corruption effectively, thus creating a vicious circle that needs to be broken. Ongoing concerns regarding the rule of law prevent key member states from committing to a concrete timeline for the Western Balkans enlargement. It seems that the EU must strike a careful balance between offering a tangible commitment to enlargement in the Western Balkans and acknowledging the region's objectively slow progress in combating corruption. This approach is essential to maintaining hope and pressure for reform in the Western Balkans.<sup>76</sup>

As the region is struggling to effectively tackle organised crime, another key condition set by the EU is the fight against organised crime, which besides its detrimental effects is a key factor to reinforcing corruption. The fight against corruption, alongside strengthening the rule of law, the independence and effectiveness of judiciary, promoting and protecting fundamental rights, economic stability, as well as operation of democratic institutions, and carrying out public administration reforms remain key pillars of the enlargement policy.<sup>77</sup> The EU's newest enlargement package is balanced between the new geopolitics of Russia's invasion of Ukraine and candidates' merit in the enlargement process, as Heather Grabbe notices. The Commission's progress reports highlight widespread corruption and increasing executive control over institutions in many candidate economies. Additionally, the Western Balkan economies have become demoralised by the EU's lack of enthusiasm towards their European integration over the past decade. This has not only stifled reforms but also emboldened some leaders to adopt more authoritarian tactics to consolidate power and align with Russian interests.<sup>78</sup>

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76 SELDI. Getting EU Enlargement 2025 Right on Anti-Corruption: A Civil Society  
View: [https://seldi.net/wp-content/uploads/2020/10/Key-Points-in-English-SELDI.NET\\_.pdf](https://seldi.net/wp-content/uploads/2020/10/Key-Points-in-English-SELDI.NET_.pdf)

77 European Commission. 2023 Communication on EU Enlargement Policy. COM(2023) 690 final.  
[https://neighbourhood-enlargement.ec.europa.eu/document/download/cc71d42b-6c07-4deb-9069-5ca2082d166d\\_en?filename=COM\\_2023\\_690%20Communication%20on%20EU%20Enlargement%20Policy\\_and\\_Annex.pdf](https://neighbourhood-enlargement.ec.europa.eu/document/download/cc71d42b-6c07-4deb-9069-5ca2082d166d_en?filename=COM_2023_690%20Communication%20on%20EU%20Enlargement%20Policy_and_Annex.pdf)

78 Heather Grabbe. Rule of law rules future European Union enlargement.  
<https://www.bruegel.org/first-glance/rule-law-rules-future-european-union-enlargement>

More specifically, in the 2023 Communication on EU Enlargement Policy, the European Commission emphasised that ‘...corruption continues to be widespread across enlargement economies, and entanglement of public and private interests remains an issue of concern. Elements of “state capture” persist, with threats to democratic stability, high-level corruption and undue influence by oligarchs being observed, alongside attempts by organised criminal networks to infiltrate the economic and political systems, administrations, and media’.<sup>79</sup> The 2022 and 2023 SecuriMeter findings showed that the majority of citizens of the region perceived corruption as the main factor for the lack of effectiveness to tackling organised crime, 58% and 55%, respectively.

According to the European Commission 2023 progress reports, the economies of the region continue to have a low level of preparation in fighting corruption and organised crime (see Table 17).<sup>80</sup>

Table 17. Level of preparedness of Albania, Bosnia and Herzegovina, Kosovo\*, North Macedonia, Montenegro, Serbia to implement the EU acquis on Fight against corruption and Fight against organised crime.

Level of Preparedness	Fight against corruption	Fight against organised crime
<b>Albania</b>	Some level of preparation	Some level of preparation
<b>Bosnia and Herzegovina</b>	Early stage/ some level of preparation	Early stage/ some level of preparation
<b>Kosovo*</b>	Early stage/ some level of preparation	Early stage
<b>North Macedonia</b>	Some level of preparation/ moderately prepared	Some level of preparation
<b>Montenegro</b>	Some level of preparation	Some level of preparation/ moderately prepared
<b>Serbia</b>	Some level of preparation	Some level of preparation

The data of SecuriMeter 2024 reflect very much the problem of corruption as a persisting phenomenon. 83% of citizens of the region think that corruption remains very widespread or fairly widespread. However, compared to the SecuriMeter 2023, there is a decline in the percentage of citizens that think corruption is very widespread, while a higher percentage say it is fairly widespread, with the exception of Albania where this trend is reversed. On the other hand, a very low percentage of citizens think that corruption is very rare, or absent, and remains almost the same as in the SecuriMeter 2023.

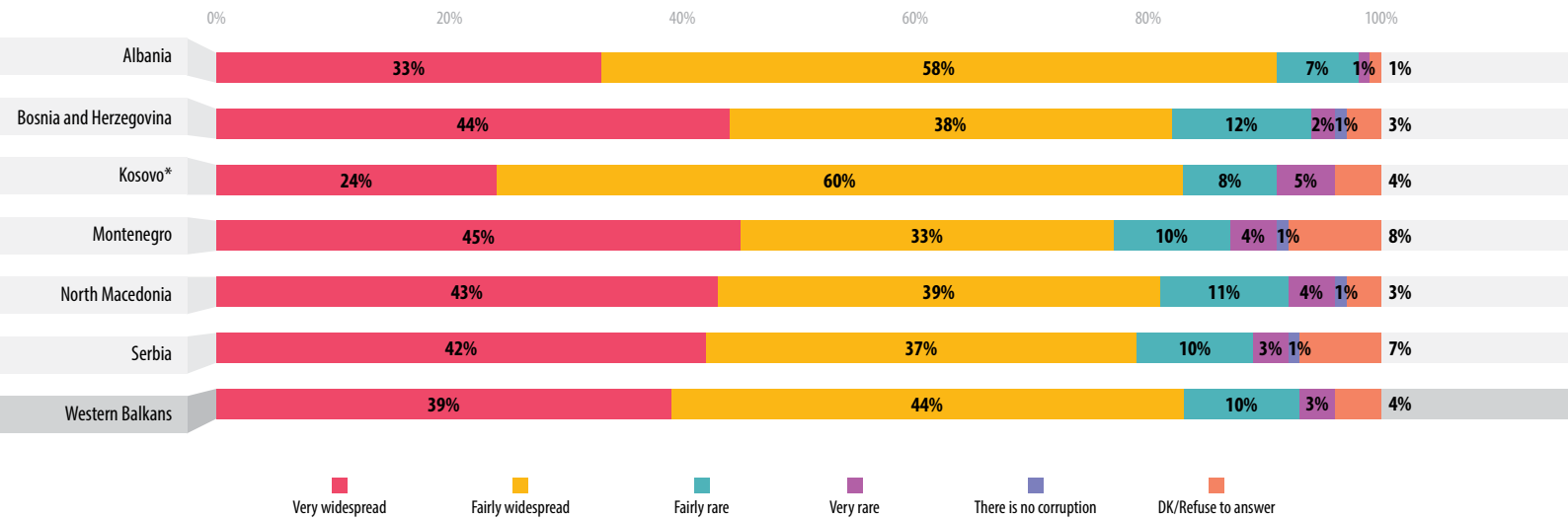
79 European Commission. 2023 Communication on EU Enlargement Policy. COM(2023) 690 final. [https://neighbourhood-enlargement.ec.europa.eu/document/download/cc71d42b-6c07-4deb-9069-5ca2082d166d\\_en?filename=COM\\_2023\\_690%20Communication%20on%20EU%20Enlargement%20Policy\\_and\\_Annex.pdf](https://neighbourhood-enlargement.ec.europa.eu/document/download/cc71d42b-6c07-4deb-9069-5ca2082d166d_en?filename=COM_2023_690%20Communication%20on%20EU%20Enlargement%20Policy_and_Annex.pdf)

80 European Commission. Strategy and Reports 2023. [https://neighbourhood-enlargement.ec.europa.eu/enlargement-policy/strategy-and-reports\\_en](https://neighbourhood-enlargement.ec.europa.eu/enlargement-policy/strategy-and-reports_en)



Figure 42. Perceived Corruption Levels in Your Economy

38. How widespread do you think the problem of corruption is in your economy?  
(All respondents, N=6004, single answer, scale from 1 to 5, share of total, %)

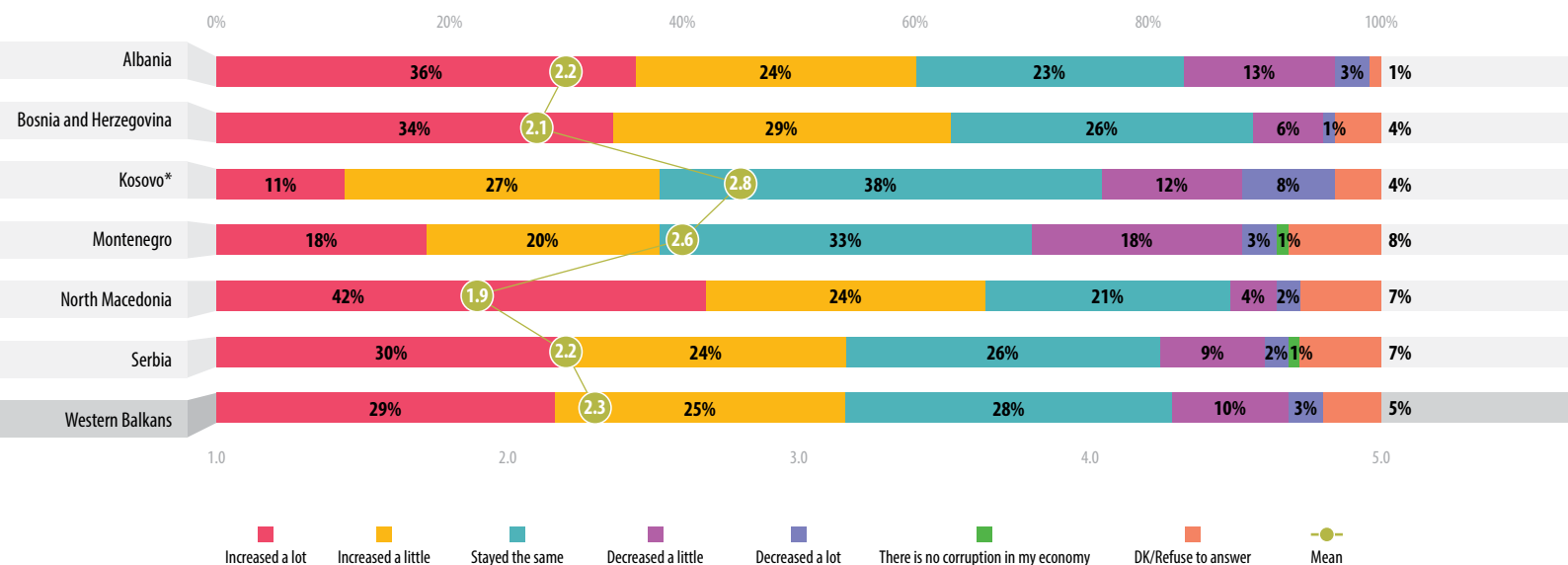


## Changes in Corruption Levels over the Past 3 Years

The persistence of the problem of corruption is reflected also in the data obtained on the trends of corruption in the past three years. Only 3% of the citizens of the Western Balkans think that corruption has decreased and another 10% say that it has decreased a little. The very large majority of 82% say that corruption has increased or stayed the same. As in the SecuriMeter 2023, North Macedonia and Bosnia and Herzegovina remain the economies with the highest percentage of citizens that think corruption has increased, or stayed the same, followed by Albania and Serbia. A higher percentage of citizens of Montenegro and Kosovo\* think that corruption has decreased in the respective economies, (21% and 20% respectively), also slightly higher percentages than in 2023.

Figure 43. Changes in Corruption Levels over the Past 3 Years

39. In the past three (3) years, would you say that the level of corruption in your economy has....?  
(All respondents, N=6004, single answer, scale from 1 to 5, share of total, %)



These data on perceptions of corruption trends obtained by SecuriMeter 2024 reflect the stagnation, or even decline, observed in the performance of economies of the region as per the Corruption Perceptions Index (See table 18 below).

Table 18. Corruption scores for the period 2019-2023 by the Transparency International Corruption Perceptions Index

Year	Albania	Bosnia and Herzegovina	Kosovo*	Montenegro	North Macedonia	Serbia
2019	35	36	36	45	35	39
2020	36	35	36	45	35	38
2021	35	35	39	46	39	38
2022	36	34	41	45	40	36
2023	37	35	41	46	42	36

A number of systemic weaknesses continues to play a key role in the persistence of corruption in the region, contributing to weakened integrity systems and creating opportunities for corruption both at the level of democratic processes and the functioning of government institutions. These include weak democracy within political parties, undue influences in party financing, and poor election management, which negative outcomes allow in turn for political interference in public-sector appointments, favouritism and lack of oversight of public procurement, as well as political interference and poor independence and accountability in the justice sector. In summary, by weakening the separation of powers, undermining the stability of oversight institutions, and preventing the development of a strong and independent civil society and media, these persistent challenges have created conditions conducive to the emergence and consolidation of authoritarian tendencies that can lead to so-called "state capture".. Against this setting, the observed corruption trends risk to persist for a longer time.

The citizens' perception of the presence of corruption and persistence of corruption over the years somehow contradicts the data on citizens' perception of bribery. SecuriMeter 2024 data show that a much lower percentage of citizens (under 10%) has admitted to having given an extra payment or a valuable gift, or to have made donations to different public institutions during their interactions with these institutions. The health care system stands out from this trend with 28% of citizens reporting to having given a bribe, yet a smaller percentage (31%) compared to 2023. In addition, 13% of citizens report having been engaged in bribery when interacting with the police, compared to 18% reported in SecuriMeter 2023. Compared to SecuriMeter 2023, which showed that 30% of citizens reported having given bribes to the Courts, SecuriMeter 2024 data show a reduction to 8% of citizens who reported having done so.

**Figure 44. Bribery and Gifts to Public Institutions: Western Balkans Results**

Q 40. In your contact or contacts with the following public institutions, did you or anyone living in your household have to give an extra payment or a valuable gift, or make a donation to the following public institutions in the past 3 years? – Results for the Western Balkans region  
(All respondents, N=6004, single answer, share of total, %)



Economy-wise, there are some variations in the percentage of citizens who have given a bribe in the last three years. Albania, Bosnia and Herzegovina and Serbia have the highest percentage of citizens that report to have given a bribe to the health care system: 47%, 29% and 27% respectively. Except for Kosovo\* and North Macedonia, which have a very small percentage of citizens that report bribing police officers, 3% and 6% respectively, in all the other economies the percentage ranges between 16% to 18%. Despite the much-praised justice sector reform, Albania has the highest percentage of citizens (15%) who report having given a bribe to courts (tribunals) while in the other economies the percentages range between 5% and 9%. Albania stands out also as the economy where a higher percentage of citizens has given a bribe to the education system officials and to the public inspectorates, 13% and 17% respectively, followed by Bosnia and Herzegovina and Serbia in which 12% report so for both institutions.

**Table 19. Bribery and Gifts to Public Institutions (results for economies)**

Q 40. In your contact or contacts with the following public institutions, did you or anyone living in your household have to give an extra payment or a valuable gift, or make a donation to the following public institutions in the past 3 years? – Results for economies

1) Police, 2) Customs, 3) The courts (tribunals), 4) Social security and welfare authorities, 5) Tax authorities, 6) Public prosecution service, 7) Politicians at national, regional, or local level, 8) Political parties, 9) Officials awarding public tenders, 10) Officials issuing building permits, 11) Officials issuing business permits, 12) The health care system, 13) The education sector, 14) Inspectors, 15) Private companies, 16) Banks and financial institutions

(All respondents, N=6004, single answer, share of total, %)

		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Albania	Yes	17%	2%	15%	7%	7%	5%	2%	1%	3%	9%	3%	47%	13%	17%	5%	4%
	No	81%	88%	77%	91%	85%	86%	91%	91%	87%	81%	89%	52%	84%	79%	92%	92%
	DK/Refuse	2%	9%	8%	2%	8%	10%	6%	8%	10%	10%	8%	1%	3%	4%	2%	3%
Bosnia and Herzegovina	Yes	18%	9%	8%	8%	10%	5%	9%	9%	8%	9%	8%	29%	12%	12%	7%	8%
	No	78%	87%	88%	88%	85%	90%	86%	86%	87%	86%	86%	66%	83%	83%	87%	88%
	DK/Refuse	4%	4%	4%	5%	5%	5%	5%	5%	5%	4%	6%	5%	5%	5%	6%	4%
Kosovo*	Yes	3%	3%	5%	4%	4%	4%	5%	5%	4%	5%	5%	23%	3%	4%	4%	3%
	No	94%	92%	90%	91%	91%	91%	90%	90%	90%	91%	89%	72%	92%	90%	90%	92%
	DK/Refuse	4%	4%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	6%	5%	5%	5%
Montenegro	Yes	17%	13%	6%	7%	11%	5%	7%	7%	6%	8%	8%	22%	11%	9%	8%	7%
	No	76%	79%	86%	85%	81%	86%	84%	84%	85%	83%	82%	69%	80%	82%	84%	85%
	DK/Refuse	8%	8%	8%	8%	9%	9%	9%	9%	9%	9%	10%	9%	9%	8%	8%	7%
North Macedonia	Yes	6%	5%	7%	6%	5%	4%	6%	7%	4%	6%	5%	17%	7%	6%	4%	4%
	No	85%	84%	85%	85%	86%	86%	85%	85%	85%	84%	85%	73%	83%	84%	86%	87%
	DK/Refuse	9%	11%	8%	9%	10%	10%	9%	9%	10%	10%	10%	10%	10%	9%	11%	9%
Serbia	Yes	16%	11%	9%	10%	10%	6%	9%	9%	9%	11%	9%	27%	12%	12%	9%	9%
	No	76%	82%	83%	82%	82%	86%	83%	83%	83%	80%	82%	64%	80%	81%	82%	82%
	DK/Refuse	8%	7%	8%	8%	8%	8%	8%	8%	9%	9%	9%	8%	8%	8%	8%	8%

The comparison of the data on the presence of corruption in the region and the trends on the persistence of corruption with the data on bribery appear to show a considerable contradiction. Although this contradiction begs for more in-depth analysis for its better understanding, the "state capture" framework may provide an explanation to this inconsistency. According to the World Bank, "state capture" refers to the actions of individuals, groups, or firms both in the public and private sectors to influence the formation of laws, regulations, decrees, and other government policies to their own advantage as a result of the illicit and non-transparent provision of private benefits to public officials.<sup>81</sup> The presence and consolidation of state capture shifts the attention of the public opinion from the administrative corruption, which often entails the payment of bribes by citizens to avoid penalties for minor infractions or obtaining faster services, to the more concerning problem of capture in which only a narrow group controls the economy resources.<sup>82</sup>

81 Hellman, Joel S.; Jones, Geraint; Kaufmann, Daniel. "Seize the state, seize the day": state capture, corruption, and influence in transition (English). Policy, Research working paper; no. WPS 2444 Washington, D.C.: World Bank Group.

82 Anderson, James; Hellman, Joel; Jones, Geraint Paul; Moore, Bill; Muller, Helga W.; Pradhan, Sanjay; Ryterman, Randi Susan; Sutch, M. Helen. Anticorruption in transition: a contribution to the policy debate (English). Anticorruption in transition Washington, D.C.: World Bank Group

## Conclusion

The data from SecuriMeter 2024 show that corruption in the Western Balkans remains widespread and that the **trends of corruption remain unchanged**, both in the eyes of the citizens and the reports of EU institutions and Transparency International Corruption Perception Index. However, the data shows that bribery remains low, except for the health care system and the police, but even these are in decline. These trends in the public perception **shift the attention to the high-level corruption and "state capture"**. This assumption is backed by the SecuriMeter 2024 data on trust in public institutions.

The majority of citizens in the Western Balkans have no trust in **political institutions** (political parties, the parliament, government) and public administration, suggesting that these institutions are regarded as corrupt. Similar lack of trust is evident by the data on the media, as most citizens think that the media disseminate misinformation or biased information which originates from the governments.

Many empirical studies have found considerable evidence for the reciprocal causal relationship between social trust and corruption which creates a vicious circle as corruption leads to lowered trust and legitimacy in democratic processes and government institutions, which in turn leads to more societal atomisation and distancing of citizens from engagement in solving collective action problems.

This **vicious circle of corruption** remains problematic for the region as the EU accession process is based on the conditionality principle by which economies engage in reforms to meet the EU standards and criteria in exchange of funds and support to implement those reforms and ultimately of membership. Thus, the lack of effectiveness in the fight against corruption hampers progress in the EU accession process which in turn is regarded as a solution to the problem.

The SecuriMeter 2024 data show that corruption then becomes a vicious circle that is becoming harder to escape as the economies become deeper entangled in it. As the first step to turn this circle into a virtuous circle is to acknowledge the stubborn reality that corruption is everywhere, this latest iteration of SecuriMeter 2024 contributes to moving in this direction.

# CHAPTER H: EMERGING SECURITY THREATS

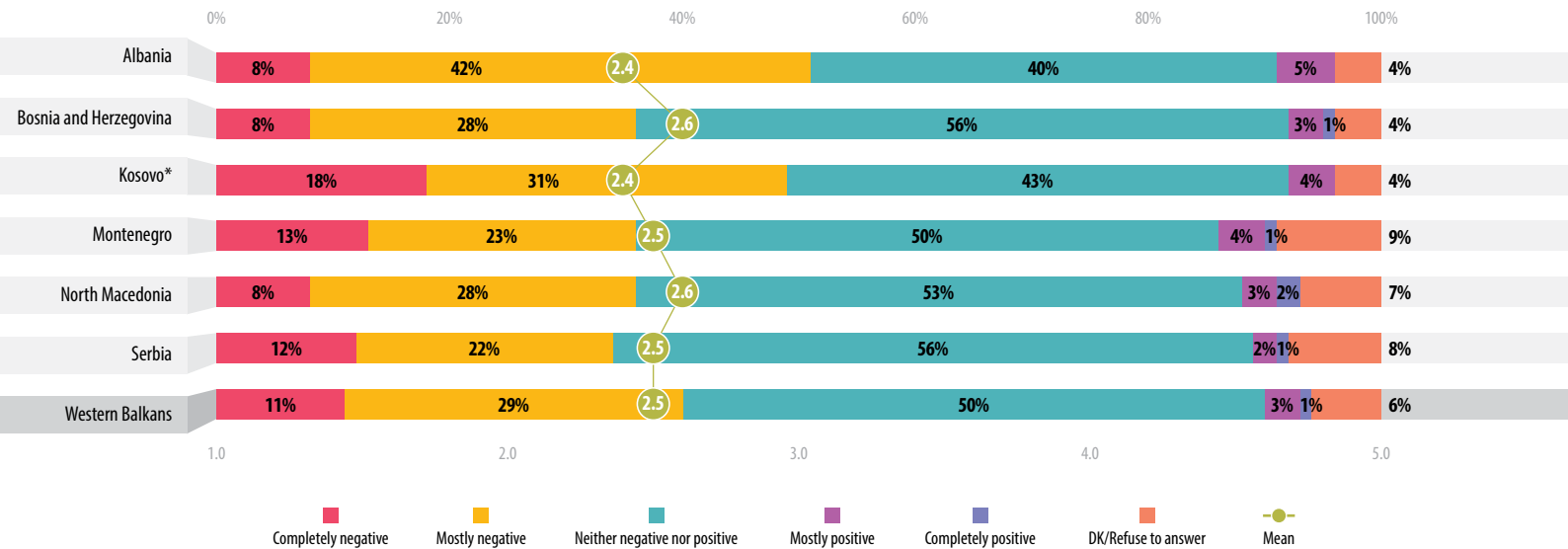
The Western Balkans, a region historically marked by geopolitical volatility and strategic significance, is increasingly confronted by a new-old set of emerging security threats. The convergence of external conflicts, such as the wars in the Middle East and Ukraine, with internal vulnerabilities, has amplified the region's exposure to instability. These conflicts are profound, not only in terms of immediate security concerns but also in shaping the long-term political and economic trajectory of the Western Balkans. In response to these evolving threats, security cooperation mechanisms within the region have taken on renewed importance. Moreover, the rapid advancement of technology, particularly the rise of artificial intelligence, has introduced new dimensions to security challenges. While AI offers opportunities to enhance capabilities of different sectors, it also raises concern about the big potential for misuse. Finally, distribution of misinformation, exacerbated by the global reach of social media, makes it hard to disseminate correct and timely information across the Western Balkans. This chapter aims to provide a comprehensive analysis of these emerging security threats in the Western Balkans.

## **The impact of the war in the Middle East on the security situation in the Western Balkans**

The terrorist attacks on Israel on 7 October 2023, and the subsequent war in Gaza have had far-reaching security and humanitarian consequences, extending well beyond the Middle East. Similar to the widespread impacts seen during the armed conflicts in Syria and Iraq, the ongoing Gaza conflict has heightened security concerns in regions far from the epicentre of violence. This means that the significant security pressures are also being deeply felt in the Western Balkans, a strategic land bridge connecting Europe, Asia, and the Middle East.

Figure 45. Impact of Middle East War on Personal Security

41. How does the start of the war in the Middle East affect the security situation in your life?  
(All respondents, N=6004, single answer, scale from 1 to 5, share of total, %)



SecuriMeter 2024 reveals a significant level of concern amongst the citizens of Western Balkans about the implications of the war in Middle East for their security. A substantial 50% of respondents from Albania, followed closely by 49% of the ones from Kosovo\*, believe that the ongoing war in the Middle East mostly and completely negatively affects their security. This sentiment is also shared by 36% of the population in Bosnia and Herzegovina and Montenegro, as well as in North Macedonia (36%) and Serbia (34%). This means that at the regional level 40% of Western Balkans population sees the impact of this war as completely and mostly negative. On the other hand, 50% of respondents across the region feel that the conflict does not significantly impact their lives, either positively or negatively. These mixed perceptions can be attributed to several key factors.

One of the primary concerns is the **potential for increased illegal immigration and the possibility of terrorists infiltrating Europe**. The Western Balkans, due to its geographical location, has historically been a transit route for migrants and refugees from conflict zones. The fear that the ongoing conflict in the Middle East could exacerbate these migration flows, bringing with them the risk of terrorist infiltration, is palpable amongst the population. Another significant concern is the **potential for radicalisation within the region**. The proliferation of hate speech and extremist content on the internet can fuel radical ideologies, leading to an increased likelihood of hate crimes or terrorist acts. The third is the worry that **foreign fighters may be mobilised**. More than 1070<sup>83</sup> people from the Western Balkans travelled to Syria and Iraq between 2012 and 2016, mostly to join Islamic State and other extremist jihadist groups that were fighting in the area. The **spread of false and misleading information** is another significant factor shaping public perception. There have been numerous instances of altered and falsified videos, as well as other deceptive content, being presented as recent footage from Gaza or as content from previous conflicts in Egypt and Syria.<sup>84</sup>

83 Shtuni, Adrian. Western Balkans Foreign Fighters and Homegrown Jihadis: Trends and implications. Available at: <https://ctc.westpoint.edu/western-balkans-foreign-fighters-homegrown-jihadis-trends-implications/>

84 Shtuni, Adrian. The Israele-Hamas conflict: threats and security implications for the Western Balkans. Available at: <https://www.icct.nl/publication/israel-hamas-conflict-threats-and-security-implications-western-balkans>

The constant presence of war in public and media discourse significantly impacts the perception of security of the population. The saturation of war-related content on television, in print, and on the radio creates a pervasive atmosphere of fear and uncertainty. For a region that has experienced its own violent conflicts in the recent past and has unresolved issues from the past, the continuous exposure to news about ongoing wars in the Middle East and Ukraine can evoke memories and heighten negative feelings.

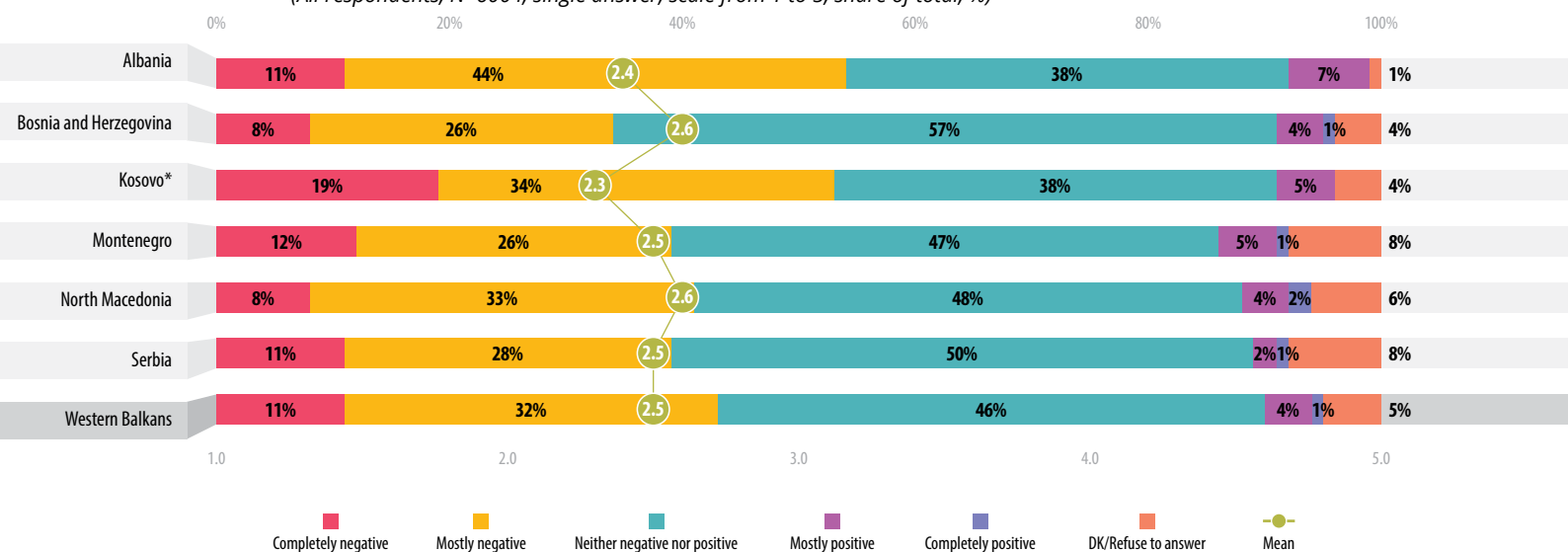
## The impact of the continuation of the war in Ukraine on the security situation in the Western Balkans

The war in Ukraine, which started on 24 February 2022, has deeply shaken the world, impacting economies, politics, and security far beyond its borders. For people in the Western Balkans, this conflict has brought a heightened sense of insecurity. In Albania, 44% of the population feels less safe because of the continuation of the war, followed by 34% in Kosovo\*, 33% in North Macedonia, 28% in Serbia, and 26% in both Bosnia and Herzegovina and Montenegro. Still, nearly half of the people in the region—46%—feel that the war has not made much difference to their security, either positively or negatively.

In SecuriMeter 2023, when asked a similar question to agree or disagree with the statement "the security of my economy will be more threatened if the war in Ukraine continues in the future" Serbian population totally and tend to agree with 48%, followed by North Macedonia with 43%, Bosnia and Herzegovina 41%, Albania with 39% and Kosovo\* and Montenegro with 38%. This means that only in Albania we have raising concern regarding security situation because of the continuation of the war in Ukraine, while in all other economies we have a decline from 4% in Kosovo\* to 20% in Serbia. Despite this decline, at the overall regional level, there is a slight increase in the feeling of insecurity, rising from 41% in SecuriMeter 2023 to 43% in this year's survey.

**Figure 46. Impact of Ukraine War on Personal Security**

42. How does the continuation of war in Ukraine affect the security situation in your life?  
(All respondents, N=6004, single answer, scale from 1 to 5, share of total, %)





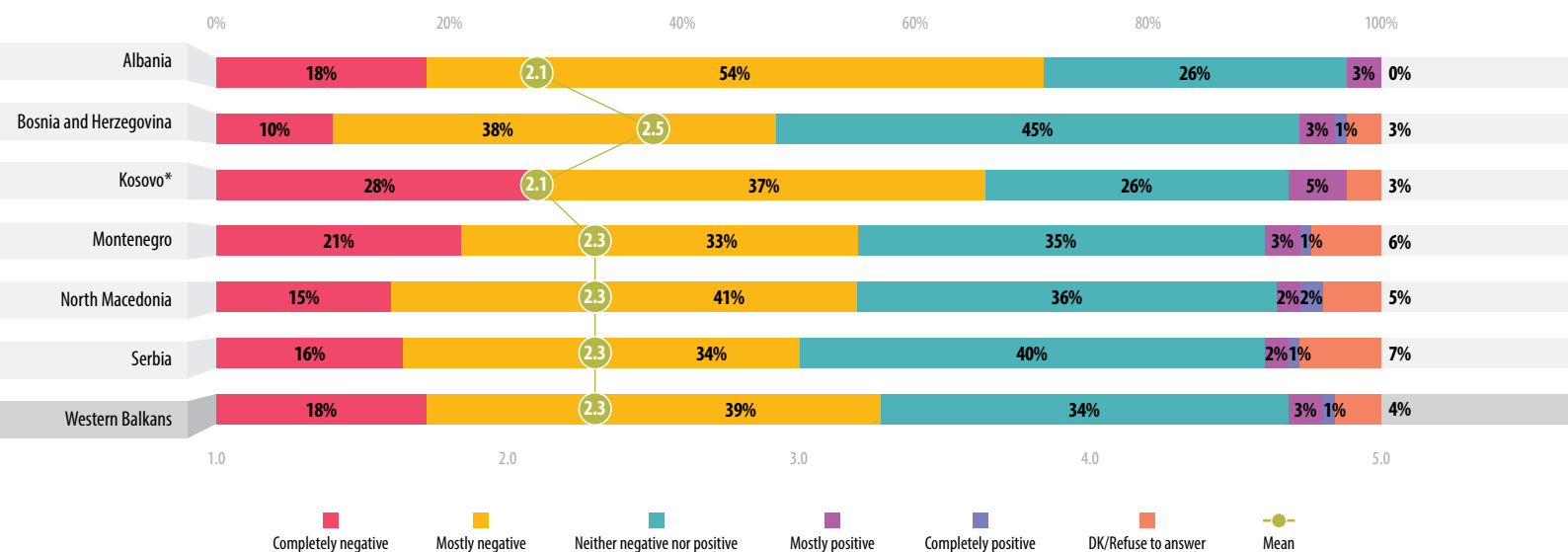
This sentiment of insecurity can be explained by three key points **including energy security, political narratives, and economic crisis**. The region's heavy dependence on Russian energy has become a critical concern, especially as Serbia depends on Russian gas for 90% of its needs, and North Macedonia and Bosnia and Herzegovina are entirely reliant on Russian supplies. The war has exacerbated global supply chain disruptions, driving up energy prices and inflation, which disproportionately impacts the already fragile economies of the Western Balkans. Additionally, the conflict has the potential to reignite nationalist sentiments and ethnic tensions within the Western Balkans, particularly in Bosnia and Herzegovina and Kosovo\*. All of this is making people feel more insecure. The Western Balkans is a region that has struggled to move past its troubled history, with lingering ethnic tensions and weak democratic institutions. In this context, the war in Ukraine feels like a distant storm that could still send shockwaves through the region.

The economic repercussions of the war in Ukraine have reverberated through the region, mirroring global trends of rising inflation, fuelled by a robust recovery in demand following the pandemic, supply chain disruptions, and rising commodity costs. In the Western Balkans, as in much of the world, the spike in global energy and food prices has been the primary factor behind the current inflation surge.

Survey data underscores the profound economic implications of the war in Ukraine on the living standards, with a significant majority of citizens reporting negative effects: 71% in Albania, 65% in Kosovo\*, 56% in North Macedonia, 54% in Montenegro, 50% in Serbia, and 48% in Bosnia and Herzegovina. At a regional level, 57% of citizens believe that the war has had a completely or mostly negative impact. A similar pattern was presented in the SecuriMeter 2023 survey, when people were asked how the war in Ukraine affected their household's purchasing power concerning basic food, energy products, fuel, and housing, and there was an overwhelming sense that it had significantly or moderately impacted households across the region.

Figure 47. Economic Impact of Ukraine War on Living Standards

43. How economic repercussions of the war in Ukraine have affected the standards of your living?  
(All respondents, N=6004, single answer, scale from 1 to 5, share of total, %)



Economic growth in the Western Balkans fell to 2.6% in 2023, down from 3.4% in 2022, largely due to the sluggish European economy and subsequent shocks. War in Ukraine and the resulting inflation have negatively affected the European Union, a key trading partner for the Western Balkans.<sup>85</sup> The New Growth Plan for the Western Balkans is one of the instruments that could assist the region deepen its ties with the European Union and double the size of the Western Balkan economies within the next ten years. To facilitate this process, a new financial instrument called the Reform and Growth Facility for the Western Balkans has been proposed, with a budget of €6 billion for the period from 2024 to 2027.

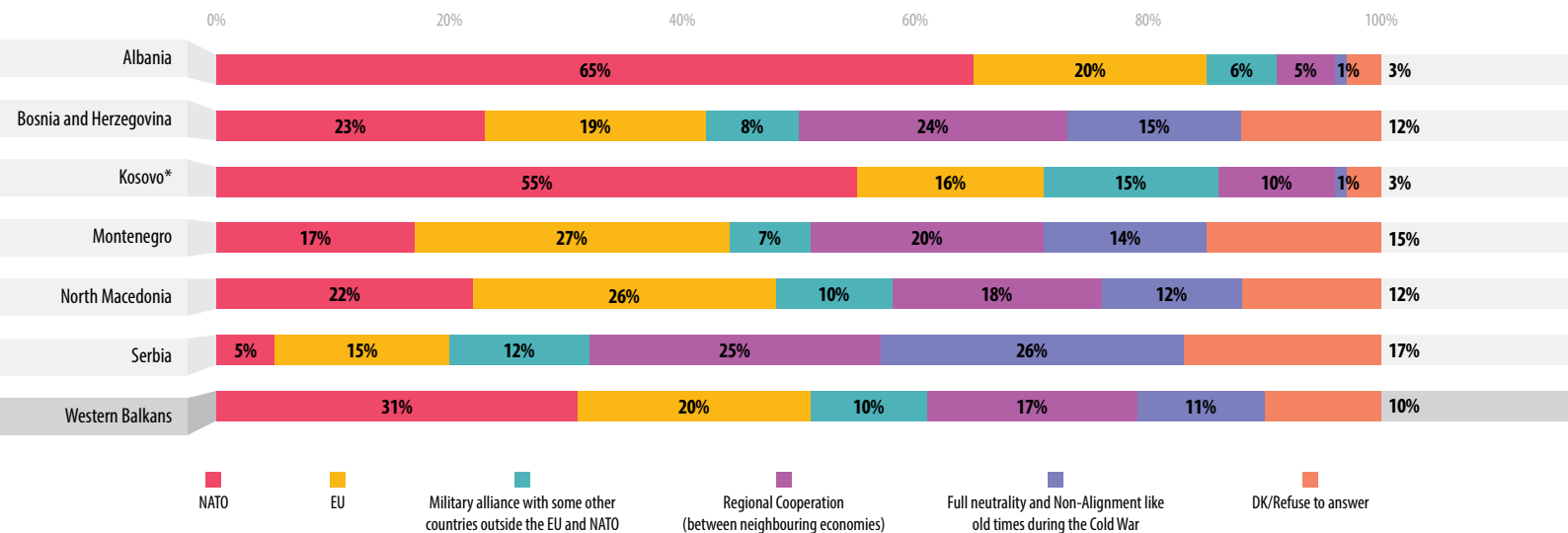
Although poverty in the Western Balkans continued to decline in 2023, the pace was slower than before the pandemic. Between 2022 and 2025, according to the forecast, the overall pace of poverty reduction is expected to slow down from over 3 percentage points yearly pre-pandemic to about 1 percentage point annually. This slowdown is attributed to the region's decelerating growth and sharp increases in food and energy prices during 2022–2023, which have strained households' purchasing power. Consequently, vulnerability to income shocks remains high, with around half of all adults in the Western Balkans living in households that are barely making ends meet, often resorting to savings or debt, and therefore lacking the ability to save any portion of their income.<sup>86</sup>

## The role of security cooperation mechanisms

In an increasingly unstable world, the mechanisms of security cooperation have taken on critical importance, especially in regions with a history of conflicts like the Western Balkans.

Figure 48. Most Important Security Cooperation Mechanism for Current Economic Challenges

44. Which security cooperation mechanism do you think is the most important for addressing the current security challenges of your economy?  
(All respondents, N=6004, single answer, share of total, %)



85 Western Balkans Regular Economic Report No. 25, Spring 2024, Invigorating Growth: [https://documents1.worldbank.org/curated/en/099040524061582128/pdf/P5006481fb98fb0db1a9401e200293e761d.pdf?\\_gl=1\\*14stspd\\*\\_gcl\\_au\\*NDQzODA0OTUxLjE3MjM3MjUyNjk](https://documents1.worldbank.org/curated/en/099040524061582128/pdf/P5006481fb98fb0db1a9401e200293e761d.pdf?_gl=1*14stspd*_gcl_au*NDQzODA0OTUxLjE3MjM3MjUyNjk).

86 Western Balkans Regular Economic Report No. 25, Spring 2024, Invigorating Growth: [https://documents1.worldbank.org/curated/en/099040524061582128/pdf/P5006481fb98fb0db1a9401e200293e761d.pdf?\\_gl=1\\*14stspd\\*\\_gcl\\_au\\*NDQzODA0OTUxLjE3MjM3MjUyNjk](https://documents1.worldbank.org/curated/en/099040524061582128/pdf/P5006481fb98fb0db1a9401e200293e761d.pdf?_gl=1*14stspd*_gcl_au*NDQzODA0OTUxLjE3MjM3MjUyNjk).

According to the SecuriMeter 2024, NATO remains the leading security cooperation mechanism, garnering 31% of the overall support. This is an increase of 6% compared to the previous year. This growth can largely be attributed to the perceived effectiveness of NATO in ensuring regional stability and security, particularly in the face of growing global uncertainties. The ongoing war in Ukraine and heightened tensions between Russia and the West likely contribute to the region's growing alignment with NATO, as economies seek stronger security guarantees.

Interestingly, while support for NATO has risen across most of the region, Montenegro and North Macedonia are exceptions. In Montenegro, support for NATO has dropped by 10%, while in North Macedonia, it has decreased by 5%. These declines might reflect internal political dynamics or a rising feeling of scepticism with NATO's position, as well as the potential influence of third-party entities. On the other side, Kosovo's support for NATO has surged dramatically, from 21% last year to 55% in 2024. Similarly, support amongst respondents from Albania has risen from 52% to 65%. This sharp increase is likely driven by the ongoing tensions between Belgrade and Pristina, as well as concerns over ethnic unrest and political instability. For Kosovo\* and the Albanian population, NATO is seen as a crucial protector, especially given the region's volatile history. Serbia has traditionally low support for NATO with only 5% due to the historical reasons and the policy of military neutrality.

The European Union is the second most preferred security mechanism, with 20% of the population favouring EU-led security arrangements. This figure reflects the EU's ongoing efforts to assert itself as a security entity in the region, though it lags behind NATO. At the individual economy level, Montenegro has the highest support (27%) for the EU as a security cooperation mechanism, which correlates with Montenegro's status as a frontrunner in EU integration in the region. The EU's role in the Western Balkans has often been more focused on economic integration and political reform rather than hard security, which might explain why it remains secondary to NATO in this context.

Regional cooperation stands at 17%, a 5% decrease from the previous year. This decline could be attributed to the ongoing disputes and unresolved conflicts within the region, such as the tensions between Belgrade and Pristina. These conflicts undermine trust and collaboration amongst neighbouring economies, making regional cooperation less attractive. The decline also highlights the challenges faced by regional initiatives which aim to foster cooperation but are often hampered by deep-seated political divisions. Albania stands out as the economy with the least support for regional cooperation, with only 5% of the population in favour, down from 7% last year. On the other hand, Serbia stands as the economy with highest support for regional cooperation with 25%.

Full neutrality and non-alignment attract 11% of the regional support, indicating that this portion of population prefers to avoid entanglement in international alliances altogether. Serbia has the largest percentage (26%) of support for this option, which is related to its long-standing policy of military neutrality. However, the relatively low percentage indicates that most economies in the region prefer security offered by collective defence arrangements over the uncertainty of standing alone.

Finally, 10% of the population favours military alliances with economies outside of the EU and NATO. This preference may reflect a desire for a diversified approach to security, possibly influenced by economic ties or political alignments with non-Western powers such as Russia or China. Serbia, for example, is the economy with the most support for this option (12%). This could be ex-

plained by the role that BRICS has in Serbia. When Serbian citizens were asked whether they would vote to join the BRICS in a hypothetical membership referendum, 39.6% agreed.<sup>87</sup> However, this option remains the least favoured, indicating that the Western Balkans still largely views Western institutions as the primary guarantors of their security.

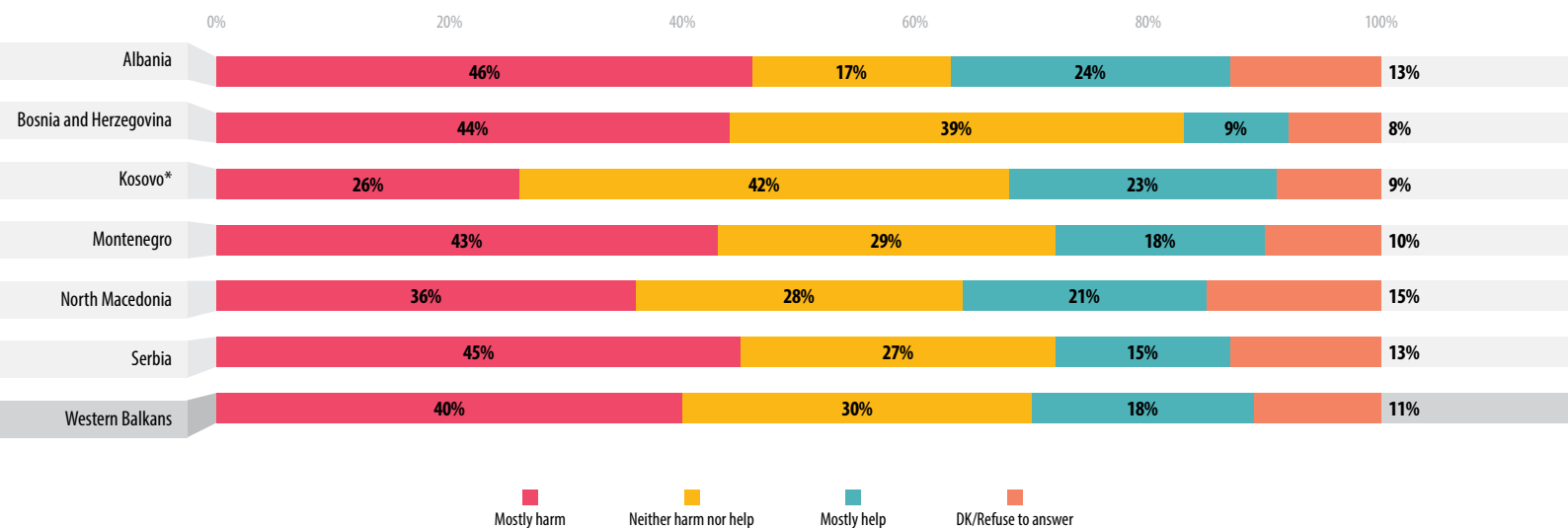
## The role of artificial intelligence

The rapid advancement of technology, particularly artificial intelligence (AI), has created numerous opportunities while also raising serious challenges. AI has the ability to transform civilisation by enabling unparalleled innovation, growth, and higher quality of life. However, the exponential development of AI brings both huge benefits and threats. While it can boost efficiency, production, and job creation, it may also result in employment loss, inequality, ethical and privacy concerns, and economic instability.

**Figure 49. Impact of Artificial Intelligence on Economy in the Next 20 Years**

45. These days, there are machines or robots that can think and make decisions on their own, often known as artificial intelligence. Do you think artificial intelligence will mostly help or mostly harm people in your economy in the next 20 years?

(All respondents, N=6004, single answer, share of total, %)



A significant portion of Western Balkan citizens, 40%, view artificial intelligence as mostly harmful. Meanwhile, 30% hold a neutral stance, seeing AI as neither harmful nor helpful, 18% believe it is mostly helpful, and 11% are unsure or refuse to express an opinion. When examining the data more closely, we observe that the highest levels of concern are found in Albania, where 46% of the population perceives AI as mostly harmful. This is followed by Serbia at 45%, Bosnia and Herzegovina at 44%, Montenegro at 43%, North Macedonia at 36%, and Kosovo\* at 26%.

These results indicate that a widespread distrust of AI in the Western Balkans is a little bit lower compared to the global trends. According to a global survey on trust in artificial intelligence, three out of five people (61%) are unwilling to trust AI systems, citing ambivalence or an unwillingness to trust. People's scepticism and ambivalence towards AI can be explained by their differing per-

87 International position of Serbia: Media and citizens' attitudes. Available at: <https://istrazivanja.rs/wp-content/uploads/2024/06/Medunarodni-polozaj-Srbije-mediji-i-stavovi-gradani.pdf>

spectives on the benefits and risks. Most individuals (85%) believe that AI results in a variety of benefits, and that 'process' benefits such as increased efficiency, creativity, effectiveness, resource utilisation, and cost savings outweigh 'people' benefits such as enhanced decision-making and outcomes. However, just one in every two respondents believes that the benefits of AI exceed the risks. 73% of people around the world express concern about the potential hazards of AI.<sup>88</sup>

This widespread anxiety is most likely motivated by fears about employment displacement, privacy concerns, and the potential misuse of AI technologies. The rapid pace of AI research, combined with its often unanticipated implications, exacerbates these concerns. Lack of understanding and knowledge about AI is one of the causes of these worries. Despite the fact that 82% of people are aware of AI, 2 out of 3 claim not to know what AI is or when or how it is employed. For instance, 45% of people are unaware that AI is used on social media, despite the fact that 87% of people use it. Individuals who have a better understanding of AI are more inclined to embrace and trust it, as well as see more advantages of using AI.<sup>89</sup>

Lack of legislative framework may also influence this unfavourable view. A step in a positive direction was taken in August 2024 when the EU adopted its first AI Act. By guaranteeing that AI systems uphold fundamental rights, safety, and ethical standards, as well as by addressing the risks associated with extremely potent and significant AI models, the new regulations hope to promote trustworthy AI in Europe and beyond. Meanwhile, Serbia is the first economy in the region which drafted the Strategy of Development of Artificial Intelligence (2020 – 2025). The Strategy intends to promote economic growth, enhance public services, advance scientific personnel, and create future employment skills. It guarantees that artificial intelligence is developed responsibly and safely, optimising its potential to improve quality of life and support Sustainable Development Goals.<sup>90</sup> Serbia has made significant strides in regulating AI, with established mechanisms for oversight, transparency, and harm prevention. Besides AI Strategy, along with an Action Plan, there are Ethical Guidelines and a working group tasked with drafting AI legislation, which reflects ongoing regulatory efforts. When it comes to other economies in the region, Albania and Montenegro have no laws addressing the use of AI systems, whereas Bosnia and Herzegovina and North Macedonia have no legislation addressing AI restrictions, but do have some personal data protection policies that may be relevant. Kosovo\* participates in the EU's Digital Europe Programme, although there are no explicit AI rules.<sup>91</sup>

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88 Gillespie, Nicole, Steven Lockey, Caitlin Curtis, Javad Pool, and Ali Akbari. Trust in artificial intelligence: A global study. The University of Queensland and KPMG Australia 10 (2023)

89 Ibid.

90 Strategy for the Development of Artificial Intelligence in the Serbia for the period 2020-2025

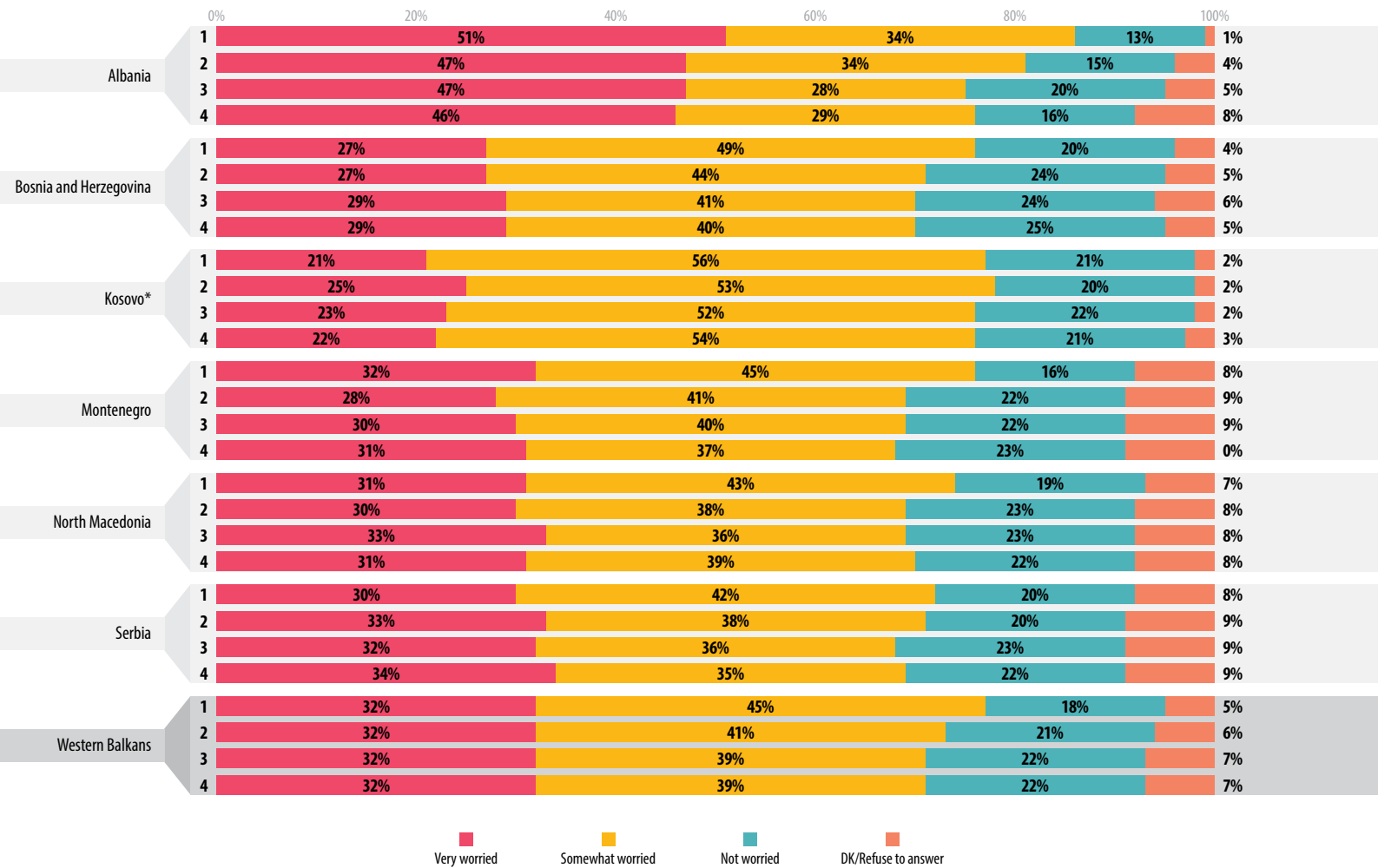
91 DSA, DMA, AIA and Western Balkans. Share Foundation. Available at:  
[https://www.sharefoundation.info/wp-content/uploads/SHARE\\_DSA-DMA-AIA-STUDY.pdf](https://www.sharefoundation.info/wp-content/uploads/SHARE_DSA-DMA-AIA-STUDY.pdf)

Figure 50. Security Actions Taken to Protect Personal Information

46. Which of the following things have you done for reasons of security?

1) Personal information being stolen; 2) Personal information being used by companies for marketing purposes without your permission; 3) Personal information being used by the government without your permission; 4) Personal information being stolen by foreign economies.

(All respondents, N=6004, single answer, scale from 1 to 3, share of total, %)



The right to privacy is essential for safeguarding personal information and ensuring individual privacy. It is striking that a significant majority of the Western Balkan population expresses deep concerns about the misuse of their personal information. Whether it is stolen, used for marketing without their permission, accessed by the government without their consent, or even taken by foreign economies, the concern is widespread. Across all these categories, a substantial portion of the population - ranging from 71% to 77% - expresses being either very worried or somewhat worried about the security and proper use of their personal information. According to the 2021 World Risk Roll, across the globe, at least two-thirds of internet users expressed very or somewhat concern about the theft of their personal information (77%), its unauthorised use by businesses for marketing reasons (74%), or its unauthorised use by the government (68%). Nearly two out of every five responded that each case worried them greatly.<sup>92</sup> This indicates that concerns in the Western Balkans mirror those seen globally.

The European Union's digital ecosystem is shaped by the Digital Services Act, Digital Markets Act, and Artificial Intelligence Act. These moves towards comprehensive regulation of digital services, markets, and AI establish a crucial basis for the European Digital Single Market. Over the years, the digital landscape of the Western Balkans has witnessed the alignment of numerous laws with the EU acquis like General Data Protection Regulation (GDPR) which influenced changes to personal data protection laws across the region. For Western Balkan economies seeking EU membership, this regulatory framework is especially important, as they face more complex digital challenges and have outdated, inconsistent, and insufficient laws to effectively govern their digital ecosystems.<sup>93</sup> The region urgently needs stronger data protection regulations, as seen by the widespread uneasiness that stems from a rising mistrust of the way data is maintained. The emergence of contemporary technologies, the internet, and social media platforms has rendered personal information more susceptible to exploitation. In just the last year, there has been a 40% increase in cyber events in the Western Balkans. Data breaches resulted in the exposure of over 1.2 million personal records in 2023, while ransomware attacks increased by 200% in the previous two years.

The fundamental purpose of data protection is to safeguard privacy and other human rights and fundamental freedoms when collecting, processing, and using personal data. However, between 2020 and 2023, Albania, Bosnia and Herzegovina, North Macedonia, Kosovo\*, and Serbia all experienced a significant increase in cyberattacks, particularly phishing and ransomware incidents, with the public sector, banks, and individual citizens being the primary targets.<sup>94</sup>

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92 World Risk Poll 2021: A Digital World. Available at: [https://wrp.lrfoundation.org.uk/sites/default/files/2024-04/LRF\\_2021\\_report\\_a-digital-world-ai-and-personal-data\\_online\\_version\\_1.pdf](https://wrp.lrfoundation.org.uk/sites/default/files/2024-04/LRF_2021_report_a-digital-world-ai-and-personal-data_online_version_1.pdf)

93 DSA, DMA, AIA and Western Balkans. Share Foundation. Available at: [https://www.sharefoundation.info/wp-content/uploads/SHARE\\_DSA-DMA-AIA-STUDY.pdf](https://www.sharefoundation.info/wp-content/uploads/SHARE_DSA-DMA-AIA-STUDY.pdf)

94 Battle for Balkan Cybersecurity: Threat and Implication of Biometrics and Digital Identity. Available at: <https://balkaninsight.com/2023/06/30/battle-for-balkan-cybersecurity-threats-and-implications-of-biometrics-and-digital-identity/>

Figure 51. News Sources as Sources of Misinformation or Bias

47. Misinformation can be defined as stories that are made up or cannot be verified as accurate but are presented to people as if they are accurate. Whereas biased information is referring to the stories prejudiced for or against someone or something. Do you believe the following news resources are the source of misinformation or bias?

1) Local TV channels or other traditional news media; 2) Online anonymous social networks; 3) International TV channels or other traditional news media; 4) Foreign economies' social media accounts; 5) Social media influencers; 6) Politicians; 7) Independent journalists; 8) Political parties.

(All respondents, N=6004, single answer, scale from 1 to 3, share of total, %)





As democracies around the world struggle to counter disinformation, fake news and misinformation, the developing democracies of the Western Balkans have been hit by this problem being much less prepared or resilient than Western societies. It should be noted that by the end of 2023, 85% of internet users were concerned about their ability to identify fake content online.<sup>95</sup> The region has been increasingly targeted by foreign-backed and home-grown misinformation in recent years, made worse by deep public mistrust of governmental institutions. Misinformation in the Western Balkans presents a complex challenge with significant implications for political stability, societal cohesion, and the integrity of media landscapes. While news sources are crucial, media literacy plays an equally important role in addressing this issue.

According to the European Media Literacy Index 2023, the Western Balkans region is on the bottom of the scale. The best positioned is Serbia, followed by Montenegro, Bosnia and Herzegovina, North Macedonia, and Kosovo\*.<sup>96</sup>

According to the survey, the biggest sources of misinformation are online anonymous social networks with 43%, followed by social media influencers with 35%, while independent journalists are on the other side of the spectrum with 20%. This correlates with the data from SecuriMeter 2024 which reveal that 75% of people believe not very much or not at all in the social media. When it comes to EU, 54% of EU citizens are frequently or extremely doubtful about whether material on the internet is accurate or fake. People in Europe are generally unsure about whether internet content is trustworthy and which has been purposefully distorted. 39% of EU citizens reported encountering disinformation on the internet on a regular or even extremely frequent basis. Only 11% of all respondents said this was not the case for them at all. This indicates that the spread of disinformation seems to be a common and universal phenomenon.<sup>97</sup>

On the other hand, the source which is most biased is political parties with 53%, followed by politicians 51%, and the local TV channels with 48%. According to the World Media Freedom Index from Reporters Without Borders from 2023, Albania ranks 96th, Serbia 91st, Bosnia and Herzegovina 64th, Kosovo\* 56th, Montenegro 39th and North Macedonia 38th.<sup>98</sup> Political, social, and economic volatility creates a risky environment for reporting and information sharing, rendering it vulnerable to abuse by entities such as Russia and China. Influence operations and propaganda dissemination, aided by digital means like social media platforms, contribute to the weaponisation of the information landscape, particularly in economies with poor digital literacy and polarised media environments.<sup>99</sup> This means that despite its many positive aspects, social media could increasingly become a tool for manipulating public opinion and spreading harmful content. In the wrong hands and with malicious intent, social media can quickly become a powerful weapon capable of influencing and altering public perception.<sup>100</sup> On the other hand, social media can be a useful option when

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95 Bhaskar, Chakravorti. AI's Trust Problem. Available at: <https://hbr.org/2024/05/ais-trust-problem>

96 The Media Literacy Indeks 2023: <https://osis.bg/wp-content/uploads/2023/06/MLI-report-in-English-22.06.pdf>

97 Unzicker, Kai. Disinformation: A challenge for Democracy. Attitudes and perceptions in Europe. August 2023. DZ\_Disinformation\_Challenge\_for\_Democracy\_Europe\_2023.pdf

98 Reporters Without Borders. World Media Freedom Index 2023. Available at: <https://rsf.org/en/index?year=2023>

99 DSA, DMA, AIA and Western Balkans. Share Foundation. Available at: [https://www.sharefoundation.info/wp-content/uploads/SHARE\\_DSA-DMA-AIA-STUDY.pdf](https://www.sharefoundation.info/wp-content/uploads/SHARE_DSA-DMA-AIA-STUDY.pdf)

100 Geopolitical Perspective of Disinformation flows in the Western Balkans [https://metamorphosis.org.mk/en/izdanija\\_arhiva/geopolitical-perspective-of-disinformation-flows-in-the-western-balkans/](https://metamorphosis.org.mk/en/izdanija_arhiva/geopolitical-perspective-of-disinformation-flows-in-the-western-balkans/)

traditional media, due to the lack of freedom that exists in the Western Balkans, misinterpret, misuse, or withhold information from the general public.

## Conclusion

The security landscape in the Western Balkans is increasingly influenced by a complex mix of old and new security threats. These challenges, set against a backdrop of evolving global dynamics, have the potential to negatively impact various aspects of the population's daily lives. The SecuriMeter 2024 highlights a profound sense of unease amongst citizens across the region, with a significant proportion expressing concerns about the negative implications of the war in Ukraine and the Middle East on their security. This heightened concern is deeply rooted in the region's historical context, marked by past conflicts and ongoing economic instability, as well as the prevalence of harmful political narratives. These factors make the Western Balkans particularly sensitive to the turbulences in global affairs. While there is a noticeable decline in worry across most individual economies regarding the security situation linked to the war in Ukraine, the overall concern at a regional level has increased by 2% compared to the previous year. This indicates that, despite a marked decline in worry across most individual economies, the broader sense of insecurity persists across the Western Balkans.

In terms of security cooperation, NATO continues to be regarded as the primary framework. Albania and Kosovo\* have seen significant increases in support for NATO, with backing in Kosovo\* more than doubling. Despite NATO's dominant role, the European Union, although crucial for driving economic and political reforms, plays a secondary role in the realm of security cooperation. Support for regional security cooperation remains traditionally low, with a slight decrease compared to last year. This reflects a lack of progress and a growing distrust amongst economies amidst the current unstable geopolitical situation.

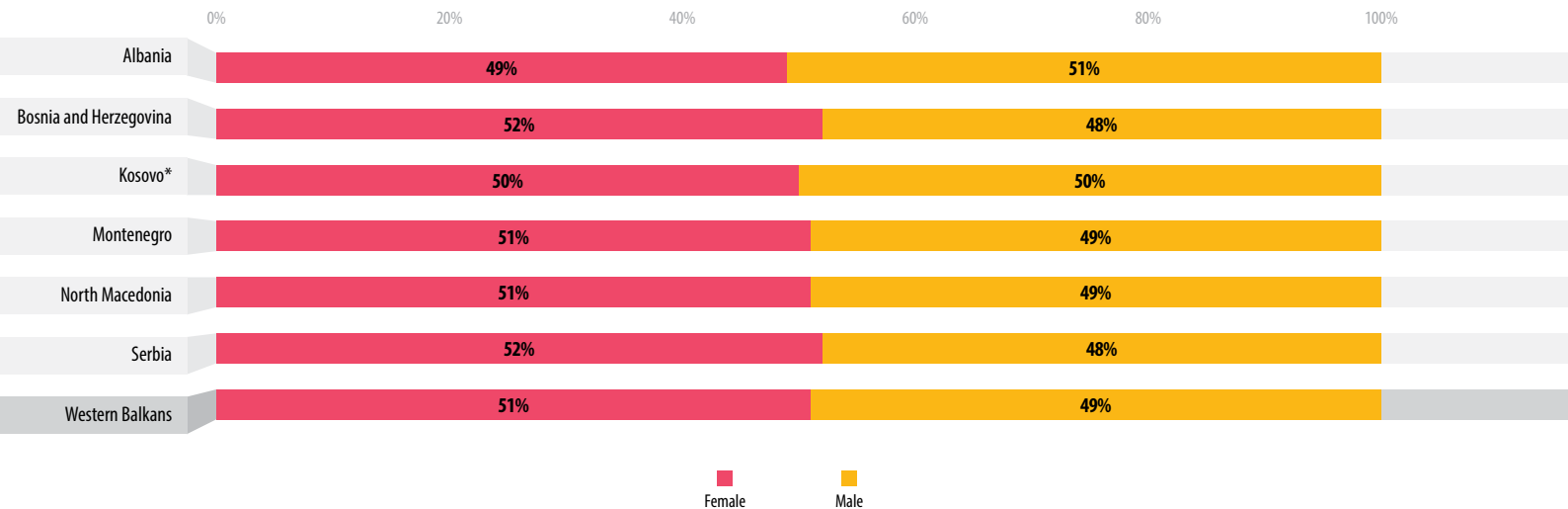
Complicating the security environment further is the rise of artificial intelligence and the widespread dissemination of misinformation. A significant portion of the population views AI with suspicion, particularly concerned about its potential to compromise security and misuse personal information. The spread of misinformation, particularly through anonymous online platforms and social media influencers, exacerbates these concerns, contributing to a growing distrust in media sources and political entities. This atmosphere of uncertainty and mistrust not only affects public perception but also poses challenges for policymakers attempting to navigate an increasingly complex security landscape.

# DEMOGRAPHICS

## Gender and Age

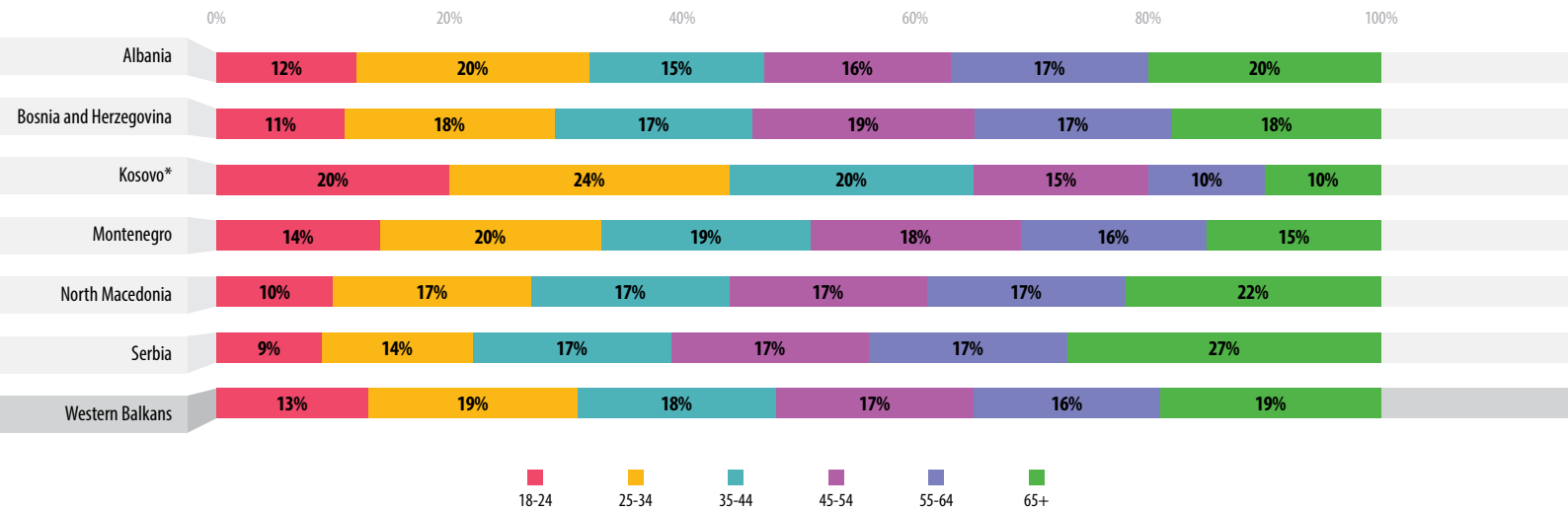
Figures 52 and 53 provide demographic data for the Western Balkans, showing a breakdown of respondents by gender and age across different economies, including Albania, Bosnia and Herzegovina, Kosovo\*, Montenegro, North Macedonia, and Serbia. Gender distribution is nearly balanced, with 50.9% female and 49.1% male respondents across the region, though slight variations exist by economy, such as Serbia having the highest female representation at 52%. Age-wise, Kosovo\* has a younger demographic, with higher percentages of 43.9% in the 18-34 age range, while Serbia shows a significantly older population, with 26.7% of respondents aged 65 or older.

Figure 52. Sample structure by gender<sup>101</sup>



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

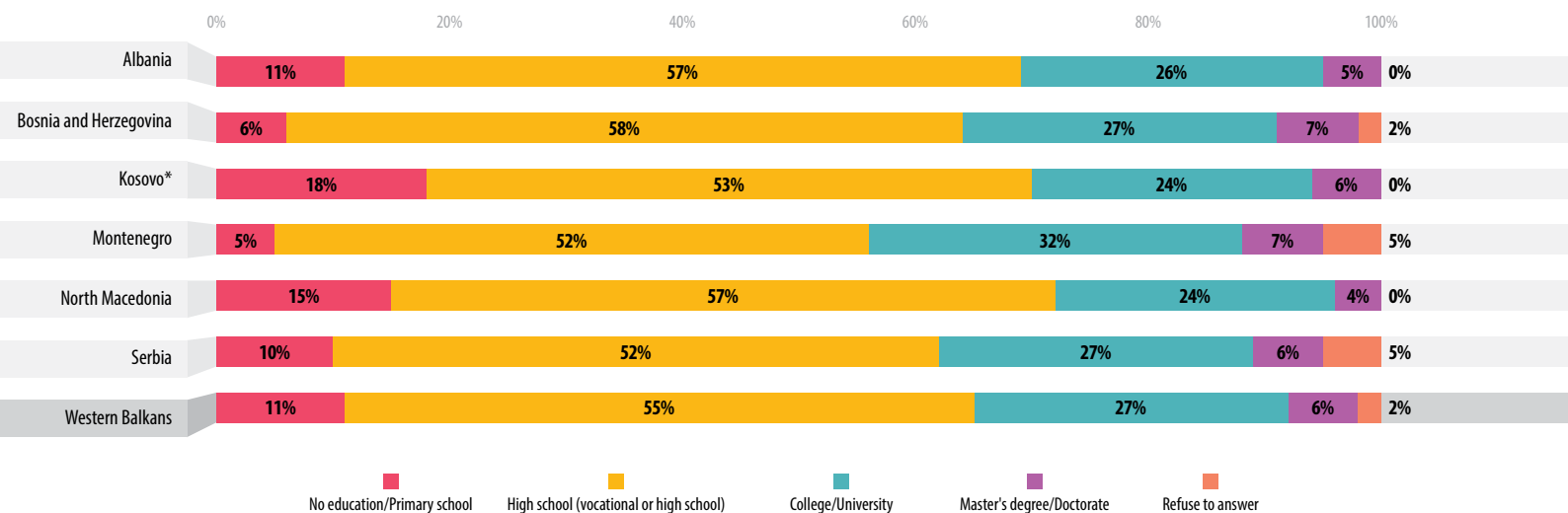
Figure 53. Sample structure by age<sup>102</sup>



## Education

Figure 54 highlights educational attainment across different Western Balkan economies. The majority of respondents, 54.8%, have completed high school, with Bosnia and Herzegovina showing the highest proportion at 58.3%, and Serbia the lowest at 51.7%. College or university graduates make up 26.7% overall, with Montenegro having the highest share at 32.3%, while Kosovo\* lags at 24%. A smaller portion, 5.6%, holds a Master's degree or Doctorate, with Bosnia and Herzegovina and Kosovo\* leading at 6.6%. Kosovo\* also has the highest percentage (17.7%) of individuals with no education or only primary school, whereas Serbia has the lowest (4.9%). Refusals to disclose education are minimal, except in Bosnia and Herzegovina (4.5%), while Albania and Kosovo\* report none.

Figure 54. Sample structure by education<sup>103</sup>



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

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

## Ethnicity

Table 20 outlines how individuals in the Western Balkans identify ethnically. The largest group is Albanians, representing 36.6% overall, with the highest concentrations in Albania (95%) and Kosovo\* (92%). Serbs make up 24.6% overall, with a notable presence in Serbia (80.8%) and Bosnia and Herzegovina (30.8%). Macedonians comprise 10.6%, primarily in North Macedonia (63%). Bosniaks account for 10.4%, concentrated in Bosnia and Herzegovina (50.1%). Montenegrins are at 7.8%, mostly in Montenegro (44.9%). Roma populations are small, at 1.8%, with the largest shares in North Macedonia (4%). Smaller groups include Croats (2.9%) and individuals identifying as other ethnicities (3.2%). Refusals to identify were low across the region at 2.1%, but higher in Serbia (6.9%).

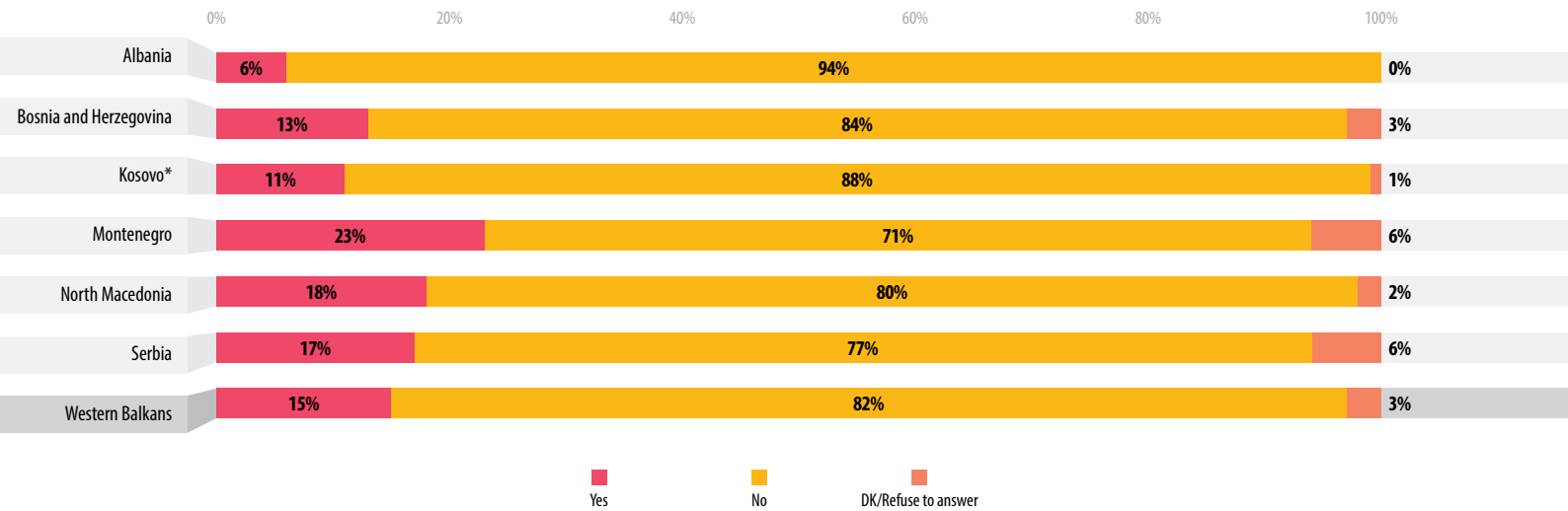
Table 20. Sample structure by ethnicity

	Albania	Bosnia and Herzegovina	Kosovo*	Montenegro	North Macedonia	Serbia	Western Balkans
Serbs	0.0%	30.8%	4.0%	29.0%	3.1%	80.8%	<b>24.6%</b>
Macedonian	0.3%	0.0%	0.0%	0.0%	63.0%	0.0%	<b>10.6%</b>
Bosniak	0.2%	50.1%	0.5%	8.8%	0.4%	2.3%	<b>10.4%</b>
Albanian	95.0%	0.3%	92.0%	5.4%	26.0%	0.9%	<b>36.6%</b>
Montenegrin	0.0%	0.5%	0.0%	44.9%	0.1%	1.1%	<b>7.8%</b>
Croats	0.0%	15.4%	0.1%	1.0%	0.2%	0.6%	<b>2.9%</b>
Roma	2.4%	0.2%	1.0%	1.0%	4.0%	2.0%	<b>1.8%</b>
Another	1.9%	1.9%	2.3%	5.0%	3.0%	5.4%	<b>3.2%</b>
Refuses to answer	0.2%	0.8%	0.0%	4.9%	0.1%	6.9%	<b>2.1%</b>

## Minorities

Figure 55 reflects responses to the question of whether individuals feel they belong to a minority group (ethnic or religious) in their area. Overall, 14.6% of respondents across the Western Balkans feel they belong to a minority group, with the highest percentage in Montenegro (23.4%) and the lowest in Albania (5.8%). The majority of respondents, 82.3%, do not feel they are part of a minority, with Albania having the highest proportion of people who do not identify as minorities (93.9%) and Montenegro the lowest (70.6%). A small percentage (3.1%) of respondents were unsure or refused to answer, with the highest in Montenegro (6.0%) and Serbia (6.1%).

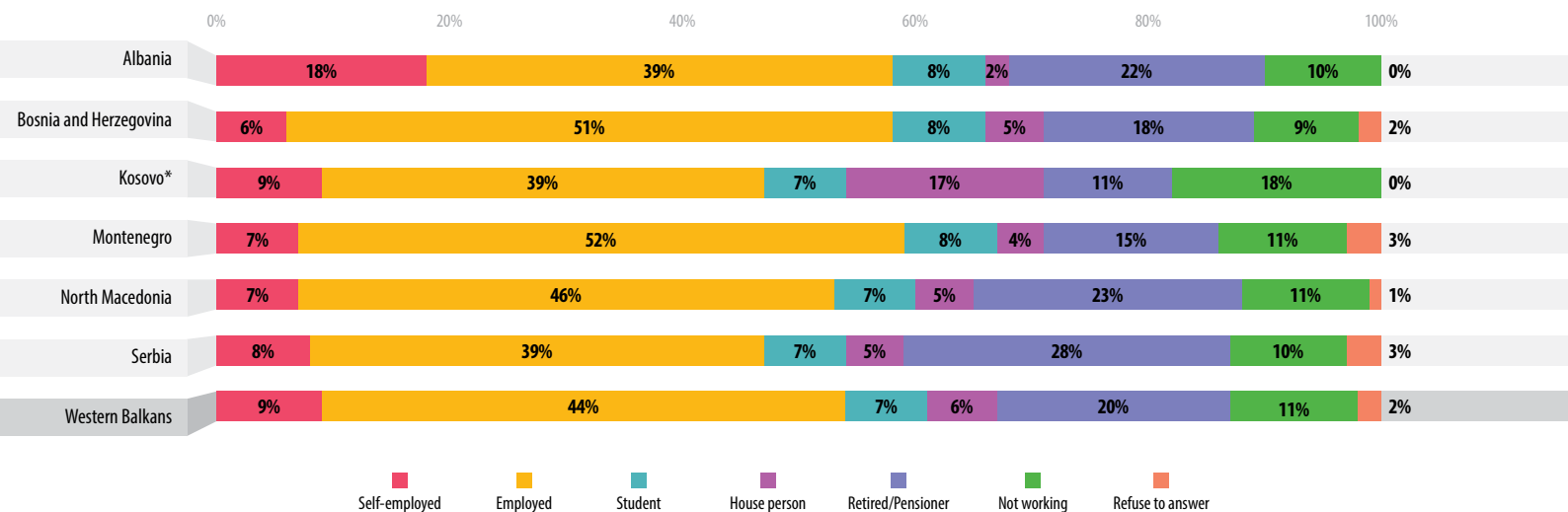
Figure 55. Sample structure by sense of belonging to a minority group<sup>104</sup>



## Working status

Figure 56 shows the current working status of respondents across different economies. Overall, 44.4% of people reported being employed, with Kosovo\* (51.9%) and Bosnia and Herzegovina (51.4%) having the highest employment rates, while Albania (38.5%) had the lowest. Self-employment is reported by 9.2%, with the highest in Albania (18.4%) and the lowest in Bosnia and Herzegovina (6.3%). Around 7.5% are students, with responses fairly consistent across economies. Approximately 19.6% of respondents are retired or pensioners, with the highest percentage in Serbia (27.6%) and the lowest in Bosnia and Herzegovina (11.0%). Those not working constitute 11.4%, with the highest percentage in Bosnia and Herzegovina (17.5%) and the lowest in Albania (10.5%). A small proportion, 1.5%, refused to answer.

Figure 56. Sample structure by working status<sup>105</sup>



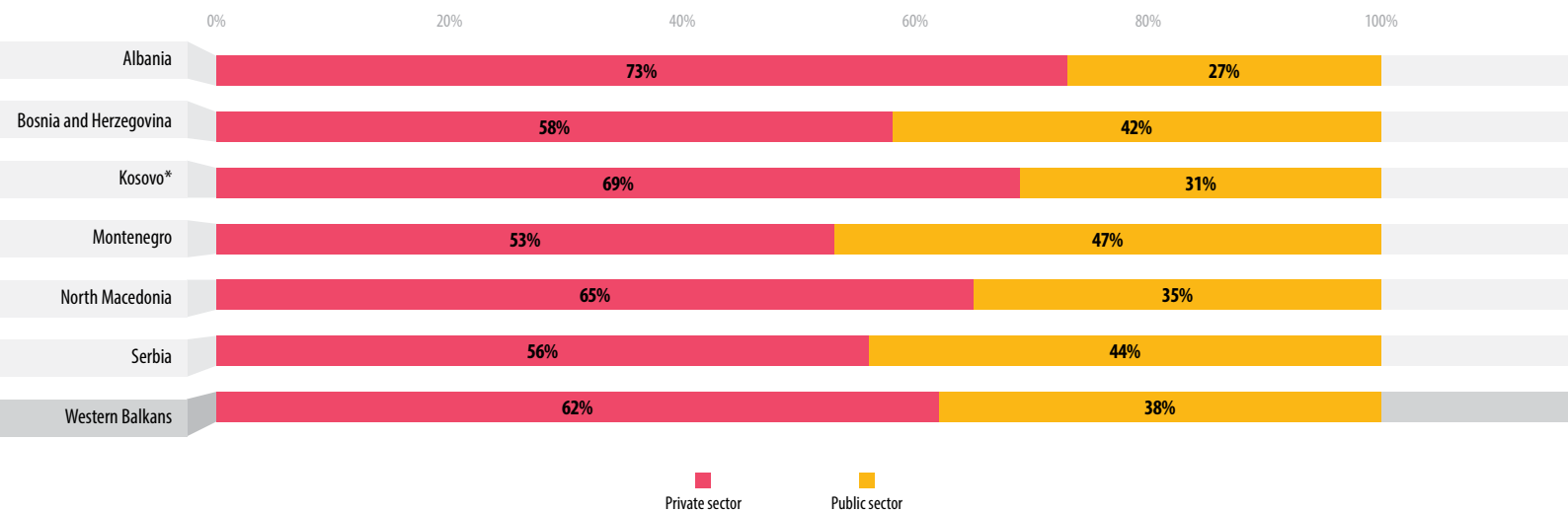
104 The figures might not add to 100% due to rounding.

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

## Employment in private or public

Figure 57 outlines the type of employer respondents have a contract with, distinguishing between the private and public sectors. A majority (62.1%) of respondents across all economies work in the private sector, with Albania having the highest percentage (73.3%) and Montenegro the lowest (53.3%). The public sector employs 37.9% of respondents overall, with the highest proportion in Montenegro (46.7%) and the lowest in Albania (26.7%). There is a notable division between economies, with those in the Western Balkans showing a stronger tendency towards private sector employment, except for Montenegro, where public sector employment is more prevalent.

Figure 57. Sample structure by employment in private or public sector<sup>106</sup>



## Occupation

Table 21 provides insights into the current occupations of respondents, revealing a wide range of professions. The largest group is employed in desk jobs (19.6%), with the highest percentages seen in Montenegro (27.4%) and North Macedonia (23.9%). Skilled manual workers make up 13% of respondents, particularly in Bosnia and Herzegovina (17.6%) and Kosovo\* (16.1%). Middle management roles account for 10.4%, notably in Serbia (14.3%). Self-employed individuals, such as shop owners and craftsmen, form 10.5%, with the highest share in Albania (23.4%). Other significant categories include service jobs (10.9%), non-desk travelling positions (10.1%), and professional roles like doctors and lawyers (6.7%). Farmers represent a smaller portion (3.6%), particularly in Kosovo\* (5.5%). Various other occupations, including business owners, fishermen, and manual labourers, are also represented but in smaller percentages across all economies.

<sup>106</sup> The figures might not add to 100% due to rounding.

Table 21. Sample structure by occupation<sup>107</sup>

	Albania	Bosnia and Herzegovina	Kosovo*	Montenegro	North Macedonia	Serbia	Western Balkans
1) Farmer	3.3%	5.5%	3.5%	2.7%	2.3%	4.5%	3.6%
2) Fisherman	0.0%	1.7%	0.0%	1.7%	0.0%	1.9%	0.9%
3) Professional (lawyer, medical practitioner, accountant, architect, etc.)	3.9%	3.3%	9.2%	3.5%	4.8%	4.5%	4.7%
4) Owner of a shop, craftsmen, other self-employed person	23.4%	6.2%	13.8%	5.4%	7.5%	6.4%	10.5%
5) Business proprietors, owner (full or partner) of a company	2.2%	1.4%	2.7%	3.5%	2.4%	2.5%	2.5%
6) Employed professional (employed doctor, lawyer, accountant, architect)	9.6%	4.7%	7.9%	5.7%	6.0%	6.6%	6.7%
7) General management, director or top management (managing directors, director general, other director)	2.9%	1.9%	3.1%	2.4%	1.5%	1.9%	2.3%
8) Middle management, other management (department head, junior manager, teacher, technician)	7.5%	14.3%	7.8%	12.1%	9.8%	10.2%	10.4%
9) Employed position, working mainly at a desk	13.0%	19.2%	11.8%	27.4%	23.9%	21.0%	19.6%
10) Employed position, not at a desk but travelling (salesmen, driver, etc.)	9.4%	11.5%	13.5%	10.1%	9.7%	6.3%	10.1%
11) Employed position, not at a desk, but in a service job (hospital, restaurant, police, fireman, etc.)	9.6%	14.0%	7.3%	11.2%	9.4%	13.8%	10.9%
12) Supervisor	0.7%	1.7%	1.0%	1.4%	1.5%	2.1%	1.4%
13) Skilled manual worker	9.7%	13.6%	10.4%	11.0%	17.6%	16.1%	13.0%
14) Other (unskilled) manual worker, servant	4.9%	0.9%	8.0%	1.9%	3.7%	2.1%	3.5%

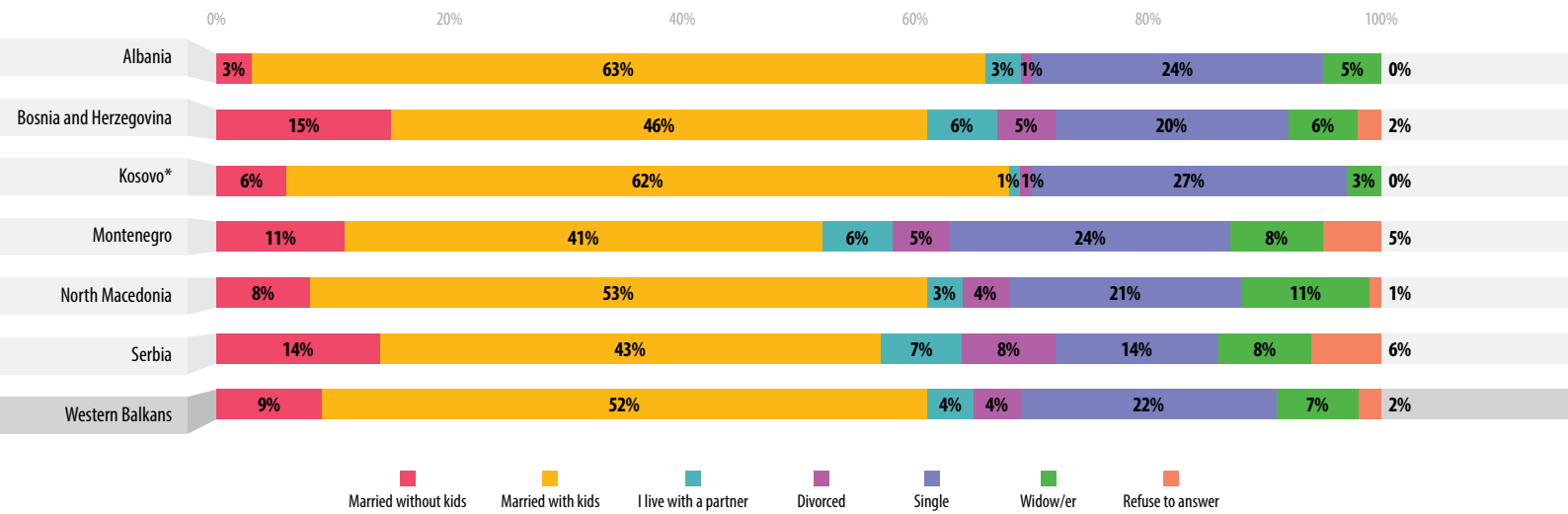
## Civil Status

Figure 58 on marital status reveals that the majority of respondents are married with children, accounting for 51.6% overall, with the highest percentages in Bosnia and Herzegovina (63.4%) and Albania (61.7%). Those who are married without children comprise 9.4%, most notably in North Macedonia (14.6%). Single individuals make up 21.6%, with the highest rates in Montenegro (27.1%) and Serbia (23.6%). A smaller percentage (4.4%) of respondents live with a partner, particularly in Montenegro (6.0%) and Kosovo\* (7.5%). Divorce rates are relatively low at 4%, with notable figures in Albania (5.4%) and Kosovo\* (8.0%). Widowed individuals make up 6.8%, with the highest percentages in Bosnia and Herzegovina (10.6%) and Kosovo\* (8.1%). A small portion (2.2%) refused to answer the question.

<sup>107</sup> The figures might not add to 100% due to rounding.



Figure 58. Sample structure by civil status<sup>108</sup>



## Regional distribution based on economies

Table 22. Sample structure by regions

Economy	Region	%
Albania	Tirana	47.3%
	Veriu	10.8%
	Qendra	19.5%
	Jug	22.4%
Bosnia and Herzegovina	Federacija Bosne i Hercegovine	62.1%
	Republika Srpska	35.5%
	Brčko Distrikt	2.4%
Kosovo*	Prishtina	27.0%
	Mitrovica	13.8%
	Gjilani	9.0%
	Peja	10.0%
	Prizreni	18.6%
	Gjakova	11.2%
	Ferizaji	10.4%
	North	24.4%
Montenegro	Centre	49.6%
	South	26.0%
	Vardar	8.0%
North Macedonia	East	9.0%
	Southwest	8.0%
	Southeast	10.0%
	Pealgonia	12.0%
	Polog	13.0%
	Northeast	8.0%
	Skopje	32.0%

<sup>108</sup> The figures might not add to 100% due to rounding.

Economy	Region	%
Serbia	Belgrade	25.1%
	Vojvodina	26.1%
	Central and West Serbia	27.4%
	South and East Serbia	21.4%

The data on regions for Albania indicates that the majority of respondents are from Tirana, making up 47.3% of the total. Following this, the southern region (Jug) accounts for 22.4%, while the central region (Qendra) represents 19.5%. The northern region (Veriu) contributes with 10.8%. There are no respondents from other regions. The focus is heavily centred on these four geographical areas in Albania.

For Bosnia and Hercegovina the data reveals the distribution of respondents across various regions, highlighting significant regional differences. Sarajevo Canton stands out with the highest representation at 20.5% (205 respondents), followed by Tuzla Canton at 15.1% (151 respondents) and Banja Luka at 14.5% (145 respondents). Bijeljina also shows a notable presence with 9.8% (98 respondents). In contrast, regions like Una-Sana Canton (6.4%), Pale (6.0%), and Zenica-Doboj Canton (7.7%) have moderate representation, while areas such as Doboj (2.5%), Trebinje (1.7%), and others like Foča and Brčko District show minimal participation, with percentages under 3%. This distribution underscores the concentration of respondents in a few key regions, while many others remain underrepresented.

The data indicates the distribution of respondents across various regions in Kosovo\*, with a notable concentration in several key areas. Pristina leads with the highest representation at 27.0% (269 respondents), followed by Prizreni at 18.6% (187 respondents) and Mitrovica at 13.8% (138 respondents). Other regions such as Peja (10.0%), Ferizaji (10.4%), Gjilani (9.0%), and Gjakova (11.2%) also contribute significant portions to the overall respondent pool, indicating a diverse geographical representation. The data, however, shows a complete absence of responses in the remaining categories, highlighting a focused participation in these specific regions.

The data on regional distribution of respondents reveals a significant concentration in the Centre region of Montenegro, which comprises 49.6% (495 respondents) of the total. The North region follows, accounting for 24.4% (245 respondents), while the South region represents 26.0% (260 respondents). Notably, there are no responses recorded in the other categories, indicating a strong focus on these three geographical areas. This distribution highlights the Centre region as the predominant area of participation, suggesting possible regional variations in engagement or representation amongst the respondents.

The regional distribution of respondents from North Macedonia shows that Skopje has the highest representation, with 32.0% (321 respondents), indicating its significance in the overall data. This is followed by Polog, which accounts for 13.0% (130 respondents), and Pealgonia at 12.0% (120 respondents). Other regions include Southeast (10.0%, 100 respondents), East (9.0%, 90 respondents), and Northeast, Vardar, and Southwest, each contributing with 8.0% (80 respondents) to the total. This data illustrates a diverse geographical spread, with a notable concentration of responses in Skopje, highlighting potential regional disparities in participation or focus within the study.

In the regional analysis of Serbia, the distribution of respondents is as follows: Central and West Serbia lead with 27.4% (276 respondents), closely followed by Vojvodina at 26.1% (260 respondents) and Belgrade at 25.1% (252 respondents). South and East Serbia have the lowest representation amongst the four regions, accounting for 21.4% (214 respondents). This distribution reflects a fairly balanced participation across the main regions, with a slight predominance of respondents from Central and West Serbia, suggesting a possible concentration of interest or issues relevant to this area.

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