



Geopolitically irrelevant in its 'inner courtyard'?

The EU amidst third actors in the Western Balkans

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¹ We thank Florian Bieber for his comments.

Non-Western countries have gained ground in the Western Balkans while EU influence continues to shrink, and its soft power evaporates. With so many opportunities missed to move EU accession forward, the EU and its members are increasingly faced with a problem that is largely of their own making. More specifically, the EU is unable or unwilling to counter external states that destabilize peacebuilding and derail conflict resolution, undermine democracy and the rule of law, and sabotage sustainable development, while its own transformative power through accession conditionality has been neutralized.

This dynamic is underscored by the 2021 BiEPAG survey, which confirms the validity of these concerns. The EU and its member-states are considered as greater propagators of fake news than Russia in all Western Balkan countries but Albania. In the case of Serbia, the survey showed that Russia and China largely outpace the EU across almost all indicators of influence and appreciation. Worryingly, Serbia has attempted to extend its influence throughout most of the region and with it, there is a risk that external orientation towards China and Russia coupled with its critical views of EU policies may present a paradigm for other Western Balkan countries. Last but not least, we observe differences in attitudes among people from different generations, and various categories of occupation and levels of education. These, however, are not as significant to justify the claim that a certain category of citizens has radically different perceptions of third actors in the region.

The constantly diminishing EU influence

The Western Balkans is probably the single region in the world where the EU should exert uncontested influence and unparalleled power of attraction. The EU is the largest partner of the Western Balkans, accounting for around two thirds of the region's external trade, inward investment, and international development assistance. For instance, in 2020, the EU accounted for 68.8 percent of the Western Balkans' international trade, while China, Russia and Turkey followed at a distance, accounting for 7.8 percent, 3.8 percent and 4.8 percent of the region's trade, respectively.¹ The same pattern applies for travel and migration of Western Balkans citizens, with EU countries being their preferred destination. Furthermore, surveys (including the BiEPAG poll) consistently demonstrate that the majority of Western Balkan citizens support the region's EU accession.

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Nevertheless, the EU image is no longer shining in the Western Balkans. Western Balkan citizens increasingly view the EU accession of their countries in transactional terms, as a perspective that would enhance their own chances of improving their material living conditions.² Free movement of people and higher

¹ "European Union, Trade in goods with Western Balkans 6", European Commission, Directorate-General for Trade, Units R4/A3, 20 May 2021, p. 8, https://webgate.ec.europa.eu/isdb_results/factsheets/region/details-western-balkans-6_en.pdf.

² Stratulat, C. et al., "Escaping the transactional trap: The way forward for EU Enlargement", BiEPAG Policy Brief, October 2021, <https://biepag.eu/publication/escaping-the-transactional-trap-the-way-forward-for-eu-enlargement/>.

living standards are considered to represent greater advantages stemming from the region's admission to the EU structures in contrast to normative and ideational benefits such as the consolidation of rule of law and democracy. Admittedly, the citizens of the six Western Balkan states react to the insincere and blurry EU membership offer, by toning down their expectations from Brussels and developing a more pragmatic view of what they may get out of this relationship.

By linking its leverage in the Western Balkans to the policy of enlargement, the lack of progress in the EU accession process in turn has also weakened the overall influence of EU towards the region. The stagnation in the opening of accession negotiations with Albania and North Macedonia has seriously compromised the Union's credibility. It is indeed very difficult to imagine how the EU could contribute to making progress in resolving intractable conflicts if it is not able to overcome differences on admittedly less politically sensitive issues (e.g. those raised by Bulgaria). More importantly, the EU has failed to come up with any credible pressures or rewards (in the absence of the membership perspective incentive) to convince leaders in the Western Balkans to carry out reforms and resolve open problems through compromise. The weakening of EU's leverage is manifested in both the stalled Belgrade-Pristina talks on the normalization of relations and the protracted instability in Bosnia and Herzegovina which reached incandescent levels in autumn 2021, with the escalation of Milorad Dodik's secessionist rhetoric and moves. The image of the EU as a normative power that acts upon its core values (which include the respect for minorities and multicultural societies) has also been impaired by the release of a non-paper that raised questions about the preservation of borders in the Western Balkans and was allegedly drafted by an individual EU member state.

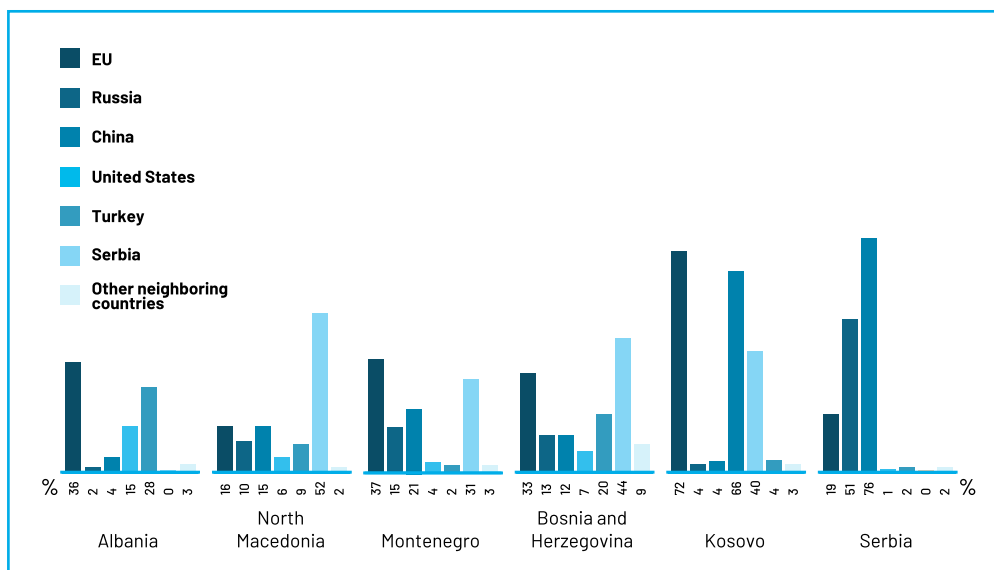
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According to the BiEPAG survey, the Western Balkan citizens largely acknowledge the importance of the EU as an economic partner. When it comes to trade and investments, the EU is considered region-wide to be the largest partner by, on average, 27.8% of respondents. Germany comes second with 14% of responses, and the United States are third with 9.8%. When adding the EU as a whole and individual member states (e.g. Germany, Italy, Greece), we observe that 47% of Western Balkan citizens view the EU-27 as the most important economic partner of their countries. The survey data paint a similar picture when it comes to the country/bloc that provides the greatest financial assistance to the Western Balkan countries. Here, the EU is recognized as the largest donor, by far, with a

regional average of 32.3% (Montenegro with 51.9% and Bosnia and Herzegovina with 39.4% have the highest levels). The United States comes second with 14.3% at a regional level, primarily thanks to the extremely high percentage in Kosovo (52.7%). Germany is considered to be the third most important financial assistance provider to the Western Balkans with a regional average of 8.7%, followed by China (6.9%), Turkey (6%) and Russia (4.9%). In aggregate, the EU and its member states are perceived to represent the greatest donor in the region by 42.1% of respondents.

When it comes to the assistance provided to the Western Balkans during the pandemic, it appears that the timely delivery of aid (when most needed) is perhaps more important than the quantity and value of the assistance itself. The following chart reveals that Serbia comes first in the responses of citizens of North Macedonia (52%), Bosnia and Herzegovina (44%), and Montenegro (31%) to the question of which country provided the greatest health-related assistance. On that question, little changes even if we bring the EU into the picture. The respondents of North Macedonia and Bosnia and Herzegovina believe that Serbia provided greater pandemic-related aid than the EU and its member states combined. Therefore, Serbia has had a greater impact in these countries with rather symbolic but timely gestures in comparison to the EU that has offered comprehensive assistance exceeding 3.3 bn Euros to the Western Balkans, which, nevertheless, arrived with much delay (e.g. vaccines) and was not communicated properly. Interestingly, while, on average, 43.8% of Western Balkan citizens expect the greatest help in overcoming the COVID-19 crisis from the EU, the respondents from North Macedonia (31.7%) distinguish themselves from the rest of the region by placing most of their assistance hopes on Serbia. Considering the small size of the Serb minority (less than 2%), this re-orientation towards Serbia has little to do with ethnic solidarity. As the next section explains, this is a worrisome trend to follow.

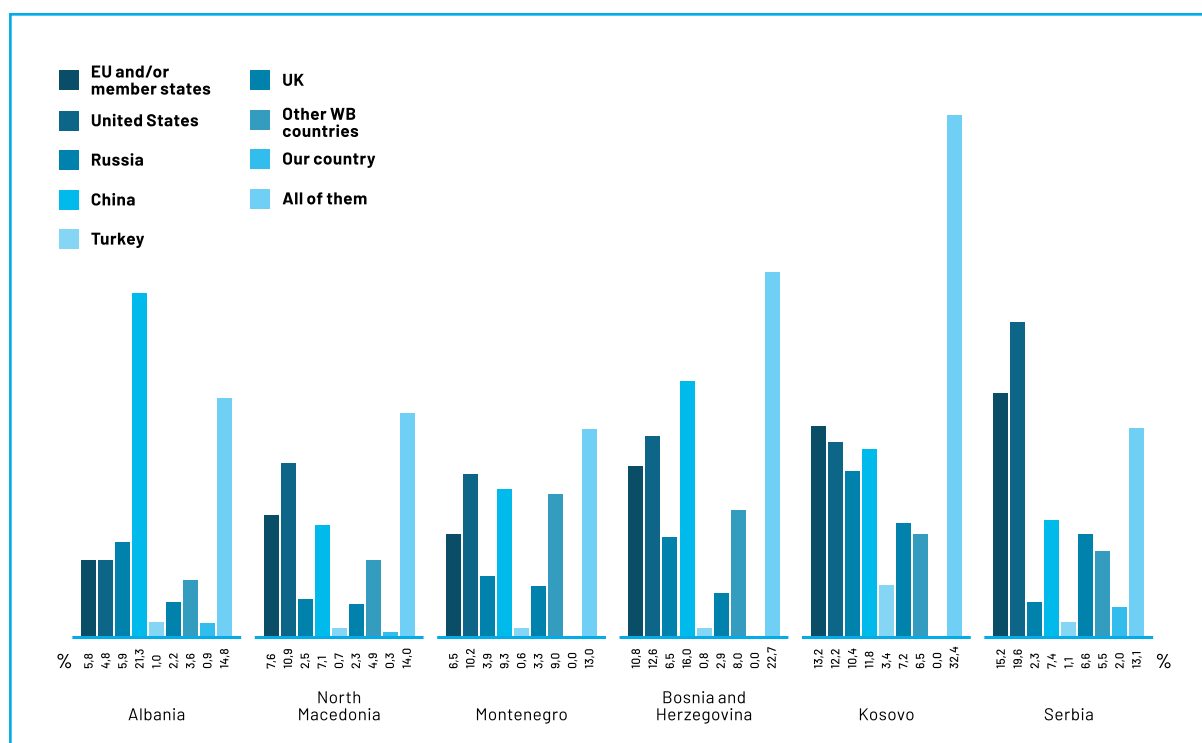
Which countries/blocs provided most help to your country during the pandemic?



The decline in EU influence is not only due to its failure to advance the region's EU accession and respond to the calls for pandemic-related assistance in a timely manner. It is also a result of Brussels' inability to counter the public diplomacy efforts of third non-Western countries in the region. While international (mainly Russian and Chinese) and local media promote the activities of non-Western governments by spreading disinformation that denigrates the West and its policies, the EU has not found a way to reach out to the Western Balkan people and present its policies properly. In this context, regional strongmen, such as Aleksandar Vučić, Edi Rama and Milorad Dodik, mediate the relationship between the international community and Western Balkan citizens and actively strive to shape the perceptions of people towards third countries by repeatedly expressing their personal preferences and highlighting their close ties with specific regional and world leaders. These Balkan leadership preferences are disseminated widely in the Western Balkan societies by regime-friendly media.³

As a result, public perceptions of the role of third actors in the region do not match realities on the ground. For instance, the survey showed that the EU and its member states are considered in all Western Balkan countries but Albania as great propagators of fake news that spread more disinformation than Russia. In the cases of North Macedonia, Kosovo, and Serbia, the EU-27 are perceived to disseminate more fake news than China, as well. For Kosovar respondents, the EU and its members are the greatest source of disinformation.

Which country/bloc has spread fake news?



³ Tzifakis, N. and T. Prelec, "From mask to vaccine diplomacy: Geopolitical competition in the Western Balkans". In: Giorgio Fruscione, (ed.) *Pandemic in the Balkans: Geopolitics and Democracy at Stake*. Milan: Ledizioni Ledi Publishing, Italian Institute for International Political Studies (ISPI), 2021, pp. 12-33; Madhi, G., "Our brother Erdogan' - From official to personal relations of political leaders of Albania and Kosovo with the Turkish President." Prague: Prague Security Studies Institute, February 2021.

Overall, despite the fact that the EU has committed unparalleled amounts of resources to the Western Balkans (from the IPA instrument and pandemic-related aid to numbers of persons deployed in multilateral missions), its influence is not very highly assessed in the region.

Overall, despite the fact that the EU has committed unparalleled amounts of resources to the Western Balkans (from the IPA instrument and pandemic-related aid to numbers of persons deployed in multilateral missions), its influence is not very highly assessed in the region. With the exception of Montenegro, nowhere in the region is the EU the most positively appreciated external actor. The roles of Russia in Serbia, United States in Albania and Kosovo, and Turkey in North Macedonia and Bosnia and Herzegovina are more highly appreciated than the corresponding role of EU in these countries. As far as leaders are concerned, President of the European Commission Ursula von der Leyen receives the least share of highly positive assessments in the Western Balkans (on average 13.5% of respondents have a 'very positive' view of her) among the ten most widely known world and European leaders.⁴

⁴ The rest of the leaders assessed by the respondents include the following: Angela Merkel, Vladimir Putin, Joe Biden, Recep Tayyip Erdoğan, Xi Jinping, Boris Johnson, Viktor Orbán, Emmanuel Macron, and Mohammad bin Zayed Al-Nahyan.

China and Russia win hearts and minds in Serbia

The most worrying trends across the board are observed in Serbia. While it does not come as a surprise that Serbian citizens are largely (77%) against their country's NATO membership – which is a continuous trend ever since the NATO-led military intervention in 1999, though even here support for NATO is lower than it was a decade ago – several other questions indicate a clear trend of Serbian citizens being the most inclined towards non-Western and more authoritarian actors. Namely, the survey shows that the majority of respondents believe that Serbia should rely most on Russia (47.4%) for its national security, followed by the EU (10.7%) and China (10.3%). Looking into the question of who provides the greatest financial assistance, China is considered as the greatest donor to the country (27.4%) followed by the EU (25.6%), in sharp contrast to the factual situation. Serbian citizens also overwhelmingly believe that China (76.2%) and Russia (50.6%) offered greater pandemic-related assistance than the EU-27 (19.2%) and they are putting their hopes in these very two countries (62.3% and 57.9% of respondents, respectively) to help overcome the COVID-19 crisis (in contrast to only 21.6% of respondents who have such expectations from the EU). The high level of trust Serbian citizens place in China and Russia is reflected by their vaccination preferences: the most trusted vaccines in Serbia are Sinopharm (27.6%) and Sputnik V (19.2%), despite some questions regarding their effectiveness, with the respondents' first explanation being that they trust their country of origin (31.5%). Overall, the influence of Russia and China is very positively assessed by most Serbian citizens (59.5% and 55.3% respectively) in contrast to the EU, for which only 18.9% of respondents expressed as favorable assessments.

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High level of trust in Russia and China could be understood as part of a broader pattern of value changes among Serbian citizens, actively promoted by the Serbian government. In the context of social changes that have marked the ongoing democratic transition period, it has been clientelist authoritarianism that gained foothold in the political and economic sphere of the country.⁵ This is re-affirmed by the positive opinion about authoritarian political figures, such as Vladimir Putin enjoying a 66.2% 'very positive' approval rate among Serbian citizens, Xi Jinping (48.9%), or Viktor Orbán (29.2%). This is in stark contrast with the mostly unfavorable opinion about EU and western world leaders such as Emmanuel Macron, Joe Biden, or Ursula von der Leyen, who receive few 'very positive' approval ratings (their 'very positive' rates are 14.7%, 5% and 4% respectively).

However, the concern is that Serbia will not be isolated in its authoritarian turn. The country is far too central and important in the Western Balkans for its neighbors to be insulated from its influences. The public spheres of Serbia, Montenegro, Republika Srpska (in Bosnia and Herzegovina), and the Kosovo Serbs represent, to some extent, connected vessels. Yet, the remit of Belgrade's influence does not limit itself to the Serbian population in the region. A clear example of such claim includes its vaccine diplomacy and the very positive opinion of Serbia's help during the pandemic by the citizens of North Macedonia. Serbia was the first country that offered (Pfizer) vaccines to North Macedonia and it allowed citizens from its neighboring countries to get vaccinated. Another case is the partnership between Serbia and Albania to promote the idea of the Open Balkan initiative for greater economic integration among the participating countries. The indications are clear that Serbia is attempting to act as a regional leader with the risk that it will encourage authoritarianism and Orbán-like Euroscepticism.

⁵ Lavrič, M. and F. Bieber, "Shifts in Support for Authoritarianism and Democracy in the Western Balkans", *Problems of Post Communism*, Vol. 68, No. 1, 2021, pp. 17-26.

Is there any change in the making?

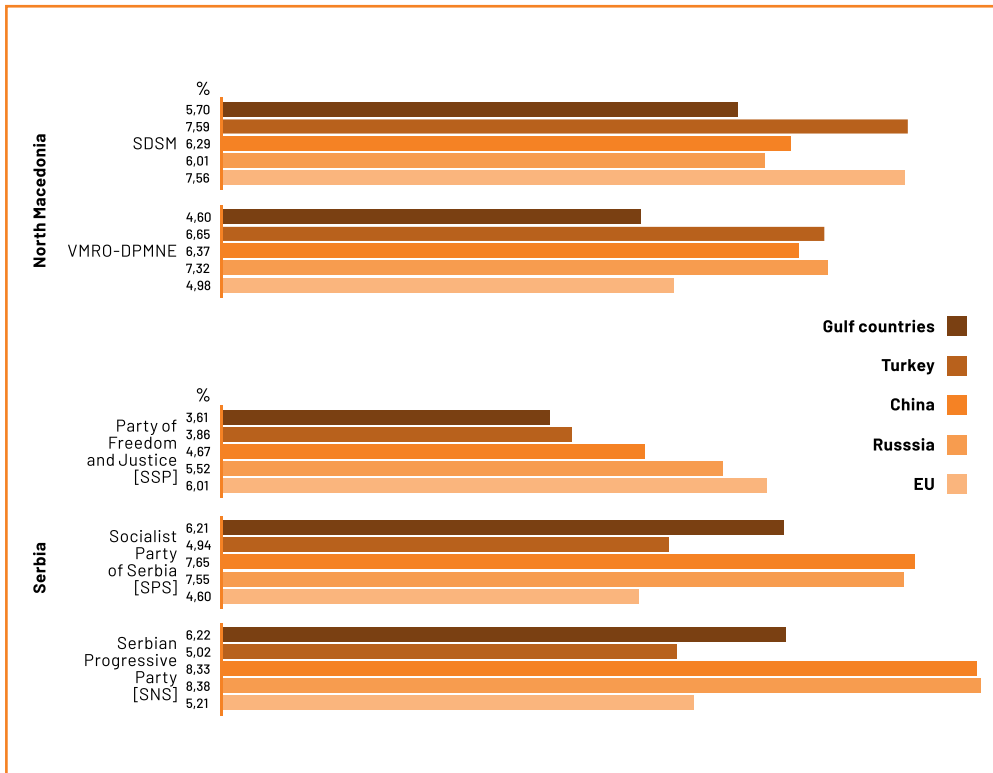
Change can come either through different political options, with parties that promote a different geopolitical orientation coming to power, or be driven by demand, with a social or generational group contributing to a change of attitudes.

In the majority of countries in the region, elections that would take place in the near future would be unlikely to produce a dramatically different geopolitical orientation. Perceptions of opposition parties' voters are not significantly different than those of the main governing parties (in Albania, Kosovo, and Bosnia and Herzegovina) and external orientation and linkages with third countries are not the subjects that drive the political debate in these countries. This suggests that the influence of and affinity towards third actors transcends the preferences of political actors currently in place in regional countries.

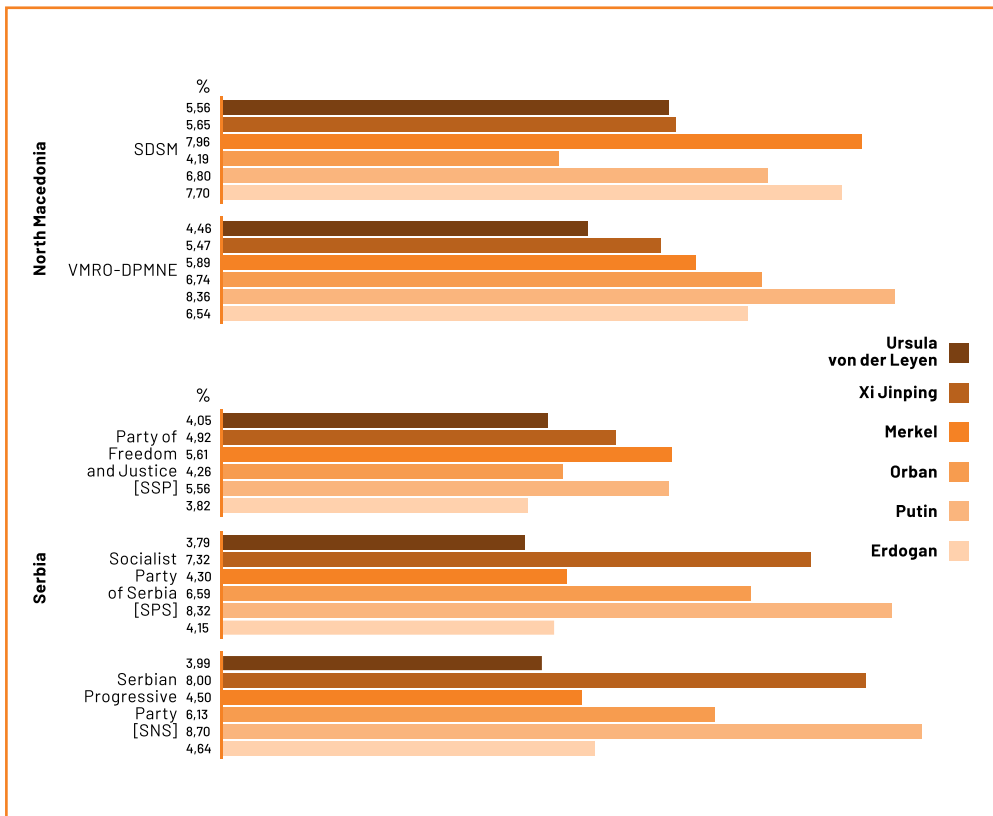
Kinship ties also matter, with voters of ethnic parties feeling stronger affinity towards their national countries. In addition, the survey proves that strongmen – like the leaders of Turkey and Hungary – appear to wield influence beyond national/cultural links, as their leadership style translates into positive approval ratings by voters of parties whose leaders are of similar disposition (e.g. Orbán among SNS voters in Serbia and VMRO-DPMNE voters in North Macedonia).

These results could suggest that citizens in the Western Balkan countries are starting to move away from perceiving EU enlargement as transformative and beginning to see it instead as more of a transactional process.

Give an assessment of the following countries/blocs from 1 to 10, where 1 is very negative and 10 is very positive.



Give an assessment of the following leaders from 1 to 10, where 1 is very negative and 10 is very positive.



The three countries where geopolitics and party choice matter include Serbia, North Macedonia and Montenegro. In Serbia, while voters of the main opposition parties are still more pro-European than those of the two main government parties, it is the difference in level of support for Russia and, in particular, China that seems to matter the most. Voters of pro-government parties are very strongly pro-China oriented (SNS almost equally pro-Russia and pro-China; SPS more pro-China); they are also more supportive of both Russia and China than of the EU; and they feel very strongly about Turkey and the Gulf countries (closeness to autocrats more than the nationality factor). Main opposition party voters (SSP) support EU the most, Russia is a relatively close second, but China comes fourth. Additionally, support for the EU among pro-government voters is likely to have been boosted by their positive view of Orbán, while the percentage of opposition voters supporting Serbia's EU membership is likely to have been negatively affected by the Union's lack of attention to Serbia's democratic backsliding. A relatively low polarization on attitudes towards the EU might therefore hide important differences between pro-government and opposition voters. A change of orientation – more precisely, a negative one – could then come from parties in power changing their direction to comply with their pro-China and pro-Russia attitude rather than from the opposition coming to power.

In North Macedonia, voters of VMRO-DPMNE, the main opposition party, are primarily pro-Russia and have weaker pro-EU and very weak pro-US attitudes; their preferred leader is Vladimir Putin while their second choice is Viktor Orbán. A change in power in North Macedonia may therefore put in danger the current understanding of the kind of European perspective the country should follow.

As a rule, awareness of the EU's presence is positively correlated with the respondents' education level, while age – and lived experience – determines the level of positive feelings towards it.

Montenegro presents a somewhat peculiar case. While the governing coalition has not pulled the country away from its Euro-Atlantic orientation (in fact, support for NATO increased during the last year and membership is ultimately approved by more than half of citizens), there are important differences between DPS and NSD – DNP (i.e., New Serb Democracy and Democratic People's Party, two Serb nationalist parties right-wing parties that are part of the governing coalition), with DPS voters being the most pro-Western. The country presents a similar analytical challenge as Serbia inasmuch as it is difficult to differentiate the extent to which parties scoring lower on affinity towards the EU do so

because of genuine affiliation with other geopolitical actors or because of accumulated frustration over democratic backsliding hiding behind the façade of the frontrunner for EU membership.

There are some important differences in terms of generation, education and occupation. None seems to be indicating a likely change of geopolitical direction in the near future but might play into different country contexts. As a rule, awareness of the EU's presence is positively correlated with the respondents' education level, while age – and lived experience – determines the level of positive feelings towards it. In Serbia, for example, the cohort of voters aged 30-44, who came of age at times of political change in 2000, is the most pro-Western and EU supportive; older voters are more strongly pro-Russian. Across the region, younger voters are more aware of China as an important economic and foreign policy actor – but are also more wary of it.

Conclusions and policy recommendations

The survey showed that the EU foreign actor influence in the Western Balkans is waning. While the EU is acknowledged as a major economic partner, its soft power and its contribution to the management of the region's problems, in particular the pandemic and its consequences, is seriously questioned. Despite the commitment of unparalleled resources, the EU support to the region is underappreciated. As a result, the EU efforts to promote conflict resolution, peacebuilding and reforms in the Western Balkans are no longer bringing about results. This negative trend is explicated, in part, by the Union's own policy failures and inconsistencies and, in part, by the rise in influence of non-Western countries (notably, China, Russia, and Turkey) who have been actively promoted by certain Western Balkan leaders and their friendly media. While these powers do not propose any alternative to the accession to European structures, they legitimize (regrettably, together with some EU member states) a variant of European integration that has already gained currency in Serbia and rests on centralized authoritarianism, weak rule of law, and a rejection of the current EU. To revive its influence in the Western Balkans, the EU should:



Open accession negotiations talks with Albania and North Macedonia to restore some of the credibility of EU enlargement (and of the Union itself by extension). Simultaneously, the EU should partially disassociate its foreign policy-making from the policy of enlargement for as long as meaningful progress in the latter is overall stalled. In particular, conflict resolution efforts (e.g. in Kosovo and Bosnia and Herzegovina) should be linked with more realistic short-term rewards and sanctions. The vague promise of EU accession is no longer working.

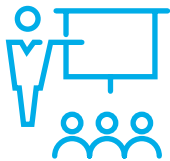


Seek for greater political coordination with the United States (as well as other Western actors whose values are aligned in the region, such as the UK, Switzerland, and Norway), especially on anti-corruption, conflict resolution and peacebuilding. The leverage of the West would increase if it speaks with one voice.

The EU should take note of the fact that the United States exerts greater influence in certain Western Balkan countries (i.e. Albania and Kosovo).



Develop greater European defense capabilities and employ them in the Balkans. The EU is better regarded as a security provider in Bosnia and Herzegovina and Montenegro than NATO or the United States. This goes in line with European efforts to seek strategic sovereignty.



Prioritize the struggle against disinformation, giving greater support to independent media and fact-checking websites in the region. At the same time, the issue of media freedom should get greater prominence in annual country reports.



Resolve its own internal problem with member states featuring weak rule of law institutions and Euroscepticism. The EU cannot discredit the emerging negative view of European integration in Serbia and elsewhere in the region if such a view is also cultivated in its own ranks. On the contrary, it ends up inadvertently promoting anti-democratic models.

Methodology

The primary data used in this BiEPAG policy analysis come from a public opinion poll conducted in Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia, and Serbia, during July and August 2021. Survey was conducted on a nationally representative sample consisted of minimum 1000 respondents aged 18+, using mix mode: telephone and online interviews – CATI (Computer Assisted Telephone Interviewing) and CAWI (Computer Assisted Web Interviewing), while post-stratification was done by region, gender, age, type of settlement and education. Data collection was implemented by Ipsos Strategic Marketing and commissioned by the European fund for the Balkans.

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About us

The Balkans in Europe Policy Advisory Group (BiEPAG) is a joint initiative of the European Fund for the Balkans (EFB) and Centre for the Southeast European Studies of the University of Graz (CSEES) promoting the European integration of the Western Balkans and the consolidation of democratic, open countries in the region. BiEPAG is grounded in the values of respect for human dignity, freedom, democracy, equality, the rule of law and respect for human rights, including the rights of persons belonging to minorities. It adheres to values that are common to a society in which pluralism, non-discrimination, tolerance, justice, solidarity and equality between women and men prevail. It is composed of prominent policy researchers from the region and wider Europe with demonstrable comprehension of the Western Balkans and the processes shaping the region. Members are Florian Bieber, Matteo Bonomi, Dimitar Bechev, Srđan Cvijić, Marika Djolai, Milica Delević, Vedran Džihčić, Richard Grieveson, Donika Emini, Dejan Jović, Marko Kmezić, Srđan Majstorović, Zoran Nechev, Tena Prelec, Corina Stratulat, Nikolaos Tzifakis, Alida Vračić, Gjergj Vurmo, Jelena Vasiljević, Natasha Wunsch.

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The European Fund for the Balkans is a joint initiative of the Erste Foundation, Robert Bosch Foundation and King Baudouin Foundation that envisions and facilitates initiatives strengthening democracy, fostering European integration and affirming the role of the Western Balkans in addressing Europe's challenges. Its strategy is focused on three overarching areas – fostering democratisation, enhancing regional cooperation and boosting EU Integration.

The EFB supports the process of affirming the efficacy of EU enlargement policy across the Western Balkans, improving regional cooperation amongst civil society organisations based on solidarity and demand-driven dialogue. It provides means and platforms for informed and empowered citizens to take action demanding accountable institutions and democracy. The focus is on continuous reforms of the policies and practices of the Western Balkans countries on their way to EU accession.

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The Centre for Southeast European Studies was set up in November 2008 following the establishment of Southeast Europe as a strategic priority at the University of Graz in 2000. The Centre is an interdisciplinary and cross-faculty institution for research and education, with the goal to provide space for the rich teaching and research activities at the university on and with Southeast Europe and to promote interdisciplinary collaboration.

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The Centre also aims to provide information and documentation and to be a point of contact for media and public interested in Southeast Europe, in terms of political, legal, economic and cultural developments. An interdisciplinary team of lawyers, historians, and political scientists has contributed to research on Southeast Europe, through articles, monographs and other publications. The centre regularly organizes international conferences and workshops to promote cutting edge research on Southeast Europe.

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