EUROPEAN ORIENTATION OF SERBIAN CITIZENS

Public Opinion Poll (December 2019)
<table>
<thead>
<tr>
<th>Agency</th>
<th>Smart Plus Research doo</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type of research</td>
<td>Quantitative field research</td>
</tr>
<tr>
<td>Methods / techniques</td>
<td>“Face-to-face” interview, in households, using a tablet</td>
</tr>
<tr>
<td>Sample</td>
<td>Three-stage random sample, adult citizens of Serbia. N = 1,050</td>
</tr>
<tr>
<td>Territory</td>
<td>Republic of Serbia (without Kosovo and Metohija)</td>
</tr>
<tr>
<td>Questionnaire</td>
<td>Structured questionnaire, duration up to 30 minutes</td>
</tr>
<tr>
<td>Weighting</td>
<td>By age and education</td>
</tr>
<tr>
<td>Period</td>
<td>11/12/2019 – 25/12/2019</td>
</tr>
</tbody>
</table>
Summary

• Following the July 2019 survey, which recorded 53% of respondents supporting EU membership, in December 2019 this support recorded a slight increase, reaching 54%. The percentage of those opposing EU membership dropped compared to the previous wave, standing at 24%. Regardless of these changes, more than a half of Serbian citizens still support Serbia's accession to the EU.

• 39% of Serbian citizens have a positive reaction to the image of the EU. On the other hand, there is a slight increase in the number of citizens who have a negative reaction.

• Every tenth Serbian citizen believes that the opening of negotiation chapters is the most important event regarding the EU accession, and only every thirteenth citizen mentioned negotiations with Pristina.

• As the greatest cause of deceleration of our country’s accession to the EU, the citizens have identified the policy of conditioning and blackmail the EU applies towards our country. This is believed by 29% of Serbian citizens. Every seventh citizen believes that the mentality of our people is the cause of deceleration of Serbia’s accession to the EU, putting this cause at the second place.

• 6 out of 10 Serbian citizens believe that the issue between Belgrade and Pristina should be resolved regardless of the EU’s expectations, while 28% of citizens believe that any issue can be resolved with Pristina, except for the status of Kosovo.

• Serbia’s EU membership is a good thing according to 42% of citizens, while 22% of them believe it to be a bad thing. There has been a decline in the number of those who think that membership is neither a good nor a bad thing for Serbia.

• For Serbian citizens, the EU primarily represents more employment opportunities (16%) and a path towards a better future for youth (16%), while 15% of citizens see it as the possibility to travel freely across the EU Member States.

• As in the previous polling waves, the number of citizens who believe that they would personally not benefit from Serbia’s EU accession (30%) is greater than the number of those who believe the country would not benefit (26%).

• Serbian citizens would rather change their previous life habits (e.g. sort garbage for recycling, pay a deposit for PET packaging, save energy, water) and work habits (working hours, vacation, benefits), 54% and 42% respectively, than pursue further studies, retraining or professional development (35% said they were ready) and, particularly, than continue living under unsatisfying standards for some more time (24% said they were ready).
The concern that EU membership will bring more problems to domestic farmers and that it will cost our country more money, are the most frequently cited reasons for concern, 36% and 32%, respectively. The fear that EU enlargement will cause small EU Member States to lose influence and the loss of social benefits due to EU accession is something that generally does not worry Serbian citizens, i.e. causes the least concern.

Compared to the previous polling wave, when 40% of Serbian citizens said that several negotiation chapters had been opened when asked about the current status of our country’s EU accession negotiations, this percentage has now gone up to 47%.

Three quarters of Serbian citizens believe that reforms should be carried out regardless of the fact that they are a condition for EU membership. Traditionally, they believe that the fight against corruption (19%) is the most important reform, i.e. the one that has the most positive effect on their everyday lives. Healthcare system reform and better protection of human rights are the second and the third most important reforms, at 17% and 13%, respectively.

The fight against corruption and better protection of human rights (12%) stand out as the areas where Serbia has achieved the greatest progress.

With regard to the amount of grants Serbia has received from the EU since 2001, 19% of the citizens believe that it is “around EUR 1 billion”, which is the predominant opinion. With regard to the level of knowledge on the topics related to EU funds, 37% of the citizens said they would like to be informed on specific projects in Serbia financed from EU funds. The amount of assistance depending on the status (in the sense of how much is that now, and how much when Serbia becomes an EU Member State) is the second most frequent topic that 25% of Serbian citizens wanted to be informed on.

As in the previous year, every third citizen has heard of a project financed from EU funds, while most of them have heard of projects in the field of environmental protection (15%) and education (14%).

The European Union, Russia and China have been the largest donors to Serbia since 2000, according to 26%, 23% and 20% of respondents, respectively. The United States of America have again taken the sixth place, although the facts put it at a high second place according to the amount of funds donated to Serbia.*

28% of citizens believe that the EU will overcome current issues, but that it will be reluctant to accept new members, while 31% say that the EU will face greater problems and that it is more likely that it will completely close itself off or even break up, than to expand or grow stronger.

The opinion that primarily Switzerland, as well as Germany, should be country models Serbia should look up to is shared by 28% and 21% of Serbian citizens, respectively.

* ISDACON information system
If there was a referendum tomorrow with the question: "Do you support the accession of our country to the European Union", how would you vote? (%) View through waves of surveys

For  Against
If there was a referendum tomorrow with the question: "Do you support the accession of our country to the European Union", how would you vote? (%)

Total sample

- I would vote for: 54%
- I would vote against: 24%
- I would not vote: 10%
- I do not know / No answer: 12%
(If you would vote against) Why would you vote against? Please state one main reason why you would vote against our country’s EU accession.

Subsample of 21.5% of citizens who would vote against Serbia’s EU accession at the referendum

- I do not see the benefit from membership: 7%
- Serbia is not regulated for the EU, does not belong to the EU: 3%
- Dictatorship, conditioning and blackmail: 2%
- They are not fair: 2%
- I do not like the EU: 1%
- The EU will break up in the near future: 1%
- Loss of integrity, culture and religion: 1%
- Because we would lose freedom: 1%
- Because of Kosovo: 1%
- Because of the changes I am not ready for: 1%
- We would be second-class citizens, cheap labor: 1%
- Other: 3%
In general, which reaction does the current image of the European Union cause with you? (%)

View through waves of surveys

<table>
<thead>
<tr>
<th>Month</th>
<th>Very negative + negative</th>
<th>Neither positive nor negative</th>
<th>Very positive + positive</th>
</tr>
</thead>
<tbody>
<tr>
<td>May 2008</td>
<td>16</td>
<td>30</td>
<td>54</td>
</tr>
<tr>
<td>December 2008</td>
<td>25</td>
<td>34</td>
<td>41</td>
</tr>
<tr>
<td>May 2009</td>
<td>25</td>
<td>33</td>
<td>42</td>
</tr>
<tr>
<td>December 2009</td>
<td>19</td>
<td>35</td>
<td>46</td>
</tr>
<tr>
<td>June 2010</td>
<td>21</td>
<td>37</td>
<td>41</td>
</tr>
<tr>
<td>December 2010</td>
<td>23</td>
<td>39</td>
<td>38</td>
</tr>
<tr>
<td>June 2011</td>
<td>29</td>
<td>32</td>
<td>37</td>
</tr>
<tr>
<td>December 2011</td>
<td>32</td>
<td>36</td>
<td>32</td>
</tr>
<tr>
<td>June 2012</td>
<td>31</td>
<td>33</td>
<td>36</td>
</tr>
<tr>
<td>December 2012</td>
<td>36</td>
<td>30</td>
<td>34</td>
</tr>
<tr>
<td>June 2013</td>
<td>37</td>
<td>35</td>
<td>28</td>
</tr>
<tr>
<td>December 2013</td>
<td>29</td>
<td>43</td>
<td>41</td>
</tr>
<tr>
<td>June 2014</td>
<td>24</td>
<td>43</td>
<td>33</td>
</tr>
<tr>
<td>December 2014</td>
<td>31</td>
<td>35</td>
<td>33</td>
</tr>
<tr>
<td>June 2015</td>
<td>34</td>
<td>31</td>
<td>35</td>
</tr>
<tr>
<td>December 2015</td>
<td>32</td>
<td>35</td>
<td>33</td>
</tr>
<tr>
<td>June 2016</td>
<td>31</td>
<td>38</td>
<td>31</td>
</tr>
<tr>
<td>December 2016</td>
<td>31</td>
<td>36</td>
<td>33</td>
</tr>
<tr>
<td>June 2017</td>
<td>28</td>
<td>32</td>
<td>40</td>
</tr>
<tr>
<td>December 2017</td>
<td>25</td>
<td>34</td>
<td>41</td>
</tr>
<tr>
<td>July 2018</td>
<td>23</td>
<td>33</td>
<td>44</td>
</tr>
<tr>
<td>December 2018</td>
<td>26</td>
<td>32</td>
<td>34</td>
</tr>
<tr>
<td>June 2019</td>
<td>22</td>
<td>38</td>
<td>40</td>
</tr>
<tr>
<td>December 2019</td>
<td>24</td>
<td>37</td>
<td>39</td>
</tr>
</tbody>
</table>

www.mei.gov.rs
In your opinion, which has been the most important event in Serbia’s EU accession process in the past year?

Total sample

- Opening negotiation chapters in general: 10%
- Negotiations with Pristina: 8%
- Opening individual chapters (4, 17, 32, 35 etc.): 5%
- Introduction of taxes / interruption of negotiations with Pristina: 4%
- Visits by international officials: 3%
- Negotiations with EU in general: 2%
- EU setting new conditions: 2%
- Other: 21%
- None: 14%
- I do not know: 36%
What do you think hinders our country’s accession to the EU the most?
Total sample

- Policy of constant conditioning and blackmailing the EU applies towards our country: 29%
- Our people’s mentality and unwillingness to change: 15%
- Current situation within the European Union: 13%
- Objective obstacles (extensive reforms in all areas to be implemented): 10%
- Inability of domestic leadership: 10%
- Unfulfilment of undertaken international obligations: 9%
- Our country's EU accession is not slowed down and/or hindered: 2%
- Wish of some of our politicians and parties to not strive towards the EU: 1%
- Does not know, does not have an opinion: 11%
As you know, the EU expects Belgrade and Pristina to resolve a series of problems in their relations. In your opinion, should these problems in the relations between Belgrade and Pristina be addressed regardless of the EU?

Total sample

- Yes, those problems should be addressed regardless of the EU: 62%
- No, there should be no agreement with Pristina on resolving any problems except the status of Kosovo: 28%
- I do not know, I do not have an opinion: 10%
In general, do you think that our country’s EU membership would be...?  
Total sample

- 42% Good thing
- 36% Neither a good nor a bad thing
- 22% Bad thing
I will now show you and read to you several statements regarding the European Union. Which of these statements best describe what the EU represents for you personally?

Total sample. Possibility of multiple answers. Overview at 100%
Do you think that you would personally have benefits from our country’s EU membership?

Total sample

- I would not have benefit at all: 25%
- I would have more harm than benefit: 5%
- I would have as much benefit as harm: 21%
- I would have benefits: 34%
- I would have a lot of benefits: 9%
- I do not know / No answer: 6%

All things considered, do you think our country would have benefits from the EU accession or not?

Total sample

- There would be no benefit at all: 15%
- There would be more harm than benefit: 11%
- There would be as much benefit as harm: 22%
- There would be benefits: 38%
- There would be a lot of benefits: 10%
- I do not know / No answer: 4%
Now think about the period preceding the EU accession. In order to join the EU, to what extent are you personally willing to:

<table>
<thead>
<tr>
<th>Activity</th>
<th>I am not ready</th>
<th>I am neither ready nor unready</th>
<th>I am ready</th>
</tr>
</thead>
<tbody>
<tr>
<td>pursue further studies, retraining or professional development</td>
<td>39%</td>
<td>26%</td>
<td>35%</td>
</tr>
<tr>
<td>continue living under unsatisfying standards for some (more) time</td>
<td>47%</td>
<td>29%</td>
<td>24%</td>
</tr>
<tr>
<td>change the previous life habits (e.g. sort garbage for recycling, pay a deposit for PET packaging, save energy, water)</td>
<td>23%</td>
<td>23%</td>
<td>54%</td>
</tr>
<tr>
<td>change previous work habits (working hours, vacation, benefits)</td>
<td>31%</td>
<td>27%</td>
<td>42%</td>
</tr>
</tbody>
</table>
Some people fear the unification of Europe and the EU enlargement. I am going to read you a list of things some people have stated they fear. For each of them, please indicate how much you personally fear them at this moment. (%)

Total sample

<table>
<thead>
<tr>
<th>Fear</th>
<th>Very worried</th>
<th>Moderately concerned</th>
<th>Neither concerned</th>
<th>Not worried</th>
<th>Do not know</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU membership will cost our country too much</td>
<td>32</td>
<td>19</td>
<td>21</td>
<td>11</td>
<td>12</td>
</tr>
<tr>
<td>EU membership will bring more problems to domestic farmers</td>
<td>36</td>
<td>24</td>
<td>18</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>EU membership will mean the end of our national currency</td>
<td>23</td>
<td>17</td>
<td>26</td>
<td>18</td>
<td>15</td>
</tr>
<tr>
<td>EU enlargement will lead to small member states losing their influence</td>
<td>22</td>
<td>18</td>
<td>30</td>
<td>12</td>
<td>13</td>
</tr>
<tr>
<td>EU membership will lead to a lesser use of our language</td>
<td>26</td>
<td>19</td>
<td>22</td>
<td>15</td>
<td>16</td>
</tr>
<tr>
<td>EU membership will also mean the loss of our national identity and culture</td>
<td>31</td>
<td>19</td>
<td>23</td>
<td>13</td>
<td>12</td>
</tr>
<tr>
<td>EU enlargement will lead to the loss of social benefits</td>
<td>19</td>
<td>18</td>
<td>29</td>
<td>15</td>
<td>14</td>
</tr>
</tbody>
</table>

www.mei.gov.rs
Are you familiar with the current status of our country in the EU accession negotiations?

Total sample

- Several negotiation chapters have been opened: 47%
- EU membership negotiations have begun: 17%
- One out of 35 negotiation chapters has been opened: 14%
- I do not know / Refuses to answer / Negotiations have not yet begun: 22%
In your opinion, do reforms necessary for EU accession need to be carried out primarily because that means fulfilling the conditions the EU has set, or should they be carried out for our own sake, regardless of whether the EU sets it as a condition?

Total sample

- These reforms should be carried out even if they weren't a condition for EU accession, in order to create a better Serbia for our own sake: 73%
- Reforms necessary for EU accession should be carried out primarily because it means fulfilling the conditions for joining the EU: 10%
- Such reforms should not be carried out at all: 8%
- Does not know, has no opinion: 9%
In your opinion, which of the following reforms are the most important? Which reforms have the most positive effect on your daily life?

Total sample. Possibility of multiple answers. Overview at 100%.

- Fight against corruption: 19%
- Healthcare system reform: 17%
- Better protection of human rights: 13%
- Judiciary reform: 13%
- Education system reform: 11%
- Agricultural reform: 9%
- Environmental protection: 7%
- Consumer protection: 7%
- None of these is important: 2%
- Does not know: 2%
In your opinion, in which areas has Serbia made the most progress?
Total sample. Possibility of multiple answers. Overview at 100%.

- Fight against corruption: 12%
- Better protection of human rights: 12%
- Environmental protection: 11%
- Consumer protection: 11%
- Education system reform: 8%
- Healthcare system reform: 7%
- Judiciary reform: 6%
- Agricultural reform: 5%
- Does not know, has no opinion: 28%
To what extent do you agree with the opinion that being a member of the European Union means, among other things, getting assistance and support of other European Union members in crisis situations?

Total sample

- I strongly agree: 12%
- I mostly agree: 26%
- Yes and no: 39%
- I mostly disagree: 7%
- I strongly disagree: 11%
- I do not know: 5%
What do you think, how much has Serbia received from EU grants since 2001?

- Around EUR 1 billion: 19%
- Between EUR 2 and 3 billion: 15%
- Between EUR 200 and 500 million: 8%
- EUR 3 billion: 8%
- More than EUR 3 billion: 6%
- EUR 100 million: 5%
- Other / I do not know: 39%

On which topics related to EU funds would you like to be informed?

- Specific projects in Serbia financed from EU funds: 37%
- The amount of assistance depending on the status (how much is that now, and how much when Serbia becomes an EU Member State): 25%
- Rules for submitting projects: 14%
- Other: 1%
- Not interested in any topic: 23%
Have you heard of any EU-funded projects?  
Total sample

(If you have heard, subsample at 100%)  
From which areas are these projects?

- Environmental protection: 15%
- Education: 14%
- Healthcare: 12%
- Cross-border cooperation: 9%
- Energy: 8%
- Science and innovation: 7%
- Agriculture: 7%
- Private sector development: 6%
- Transport: 6%
- Public administration reform: 6%
- Judiciary and internal affairs: 6%
- Other areas: 6%
- I do not know, I cannot remember: 2%
Who would you say has been the largest donor to Serbia since 2000?

Total sample. Possibility of multiple answers. Overview at 100%.

- European Union: 26%
- Russia: 23%
- China: 20%
- Japan: 8%
- Norway: 6%
- United States of America: 6%
- United Nations: 2%
- Other / I do not know: 9%
And the situation is actually the following: Assessment of the implementation of international development grants to the Republic of Serbia for the period 2000 – 2016 (in EUR millions)*

*Source: ISDACON informational system; the data on international development aid represents an estimation of its implementation and is based on data received from the representatives of the donor community; the aid encompassed by this data includes the support of bilateral and multilateral development partners offered in the form of grants in the form of funds, goods or services.
How do you see the future of the European Union?
Total sample

- In the future, the EU will face ever greater problems and it is more probable that it will completely close itself off, or even fall apart, than it will further expand and grow stronger. 31%
- The EU will probably manage to overcome current problems, but it will start closing off more and more and will be more reluctant to receive new members. 28%
- The EU will overcome current problems, it will further expand and there is a bright future ahead of it. 17%
- The EU will overcome current problems, but it will change; therefore, our membership in the EU will not mean the same to us as it does now. 15%
- I do not know, I have no opinion 9%
If you could choose a model of the country you would like to live in, which of the following country models would you choose for Serbia?

Total sample

- Switzerland: 28%
- Germany: 21%
- Norway: 16%
- Russia: 13%
- Japan: 6%
- China: 5%
- USA: 3%
- Brazil: 1%
- None: 4%
- I do not know: 3%