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## Geopolitics and Values: In Tension or in Tandem?

### What Drives Serbian Public Opinion on EU Membership

#### EXECUTIVE SUMMARY

More than 25 years after Serbia's democratic transition and its turn towards European integration, public support for EU membership has fallen to its lowest level since 2000: 39.8% in favour, 33.8% opposed, and over a quarter of citizens taking no position – a three-way split that has become a structural feature of Serbian public opinion on the issue. This policy brief examines what drives these attitudes at a moment when renewed momentum for EU enlargement coincides with deepening public disillusionment with EU integration in Serbia. It draws on a nationally representative survey of 1,000 citizens, two focus groups, and statistical modelling of the pathways through which perceptions shape support for membership.

The central finding is that erosion of trust is the mechanism through which scepticism about the EU's conduct translates into weaker support for membership. The widespread perception that the EU prioritises its geopolitical and economic interests over its stated values does not reduce support directly; it does so by undermining citizens' confidence in the EU as a credible, principled actor, and it is this credibility deficit that in turn suppresses support. Economic expectations remain the single strongest predictor of EU support, but they operate alongside, not instead of, the credibility channel: citizens who are economically optimistic are more likely to find the EU trustworthy, and it is through that trust that their optimism translates into backing for membership. Notably, media consumption and information sources do not emerge as significant drivers of EU attitudes through these pathways: the credibility problem reflects how citizens assess the substance of the EU's engagement, i.e. whether it lives up to its own standards, not how often and from which sources they receive EU-related information.

Three further findings sharpen the picture. First, this chain of effects is most pronounced among the citizens otherwise most disposed toward EU integration: those with the strongest liberal-democratic and cosmopolitan orientations register the values-interests gap more sharply than others, and their support contracts accordingly. Second, government-aligned and opposition-aligned citizens process EU-related information through structurally different logics: the credibility mechanism operates meaningfully only among opposition, student movement-aligned, and neutral citizens, while government-aligned citizens' attitudes are anchored almost entirely in economic expectations. Third, the student movement, which has elevated a democratic governance agenda that intersects directly with the credibility question at the heart of this research, has emerged in this survey as the second strongest political force in Serbia, ahead of all formal opposition parties combined. If the EU is seen to stand credibly behind these democratic governance requirements, it stands to enter a potential political transition with a constituency already disposed toward EU integration.

These findings point to several broad directions for EU engagement. Since the credibility deficit is driven by conduct rather than information, the EU should prioritise consistency between its stated values and its actions. It should also shift the balance of engagement resources from communication campaigns toward programmes that create direct experience of EU standards. Economic engagement, the single strongest lever available, needs to become more visible at the personal and local level and more explicitly tied to reform conditionality, so that it reinforces rather than undermines the credibility channel. Pro-European citizens should not be taken for granted; their conditional support calls for demonstrable commitment to rule-of-law standards, not values-heavy messaging. The structural divergence between government-aligned and opposition-aligned audiences means that a single EU message cannot serve both: the former respond to tangible modernisation benefits, the latter to evidence that financial engagement is conditional on genuine reform. And the accession process itself needs to feel achievable again: a credible, staged roadmap would address both the credibility deficit and the widespread disengagement that comes from not believing accession will ever happen, particularly if the EU signals willingness to endorse a membership target date that Serbia itself puts forward once it demonstrates genuine political will and a credible reform trajectory.



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## I. INTRODUCTION: WHY THIS MATTERS NOW

### I.1 Serbia's public perception of the EU in historical and political context

Although EU membership has been the declared strategic goal of every Serbian government since 2000, public support for accession has never moved in lockstep with the official course. Hovering between two-thirds and three-quarters for much of the 2000s, it peaked at 73% in November 2009 following the decision to grant Serbia visa-free travel across the EU.<sup>1</sup> The support then remained around 50% for much of the following decade, but has declined more sharply in recent years, standing today at 39.8%.<sup>2</sup> This makes today's level of public support the lowest since 2000, with only December 2012 coming close – at 41%.<sup>3</sup> With the EU accession process now in its third decade, the accumulation of unmet promises and expectations has taken a visible toll on the public perception of the EU and membership support.

At the same time, the EU enlargement policy has seen significant revival in the past four years, most notably since the start of Russia's full-scale invasion of Ukraine. The EU has innovated its instruments of engagement with candidates, for example through a series of growth plans and financial facilities aimed at motivating reforms with additional result-based financial support, enabling early access to specific membership benefits and opening up elements of the EU single market previously reserved strictly for EU/EEA members. The policy keeps evolving to this day, as member states, EU institutions, but also dozens of think tanks continent-wide keep feeding the Brussels discussions with new reports, papers and non-papers, all in search of a formula which will enable the Union to quickly and fully anchor its membership aspirants within its economic and security sphere of influence, without disturbing the functioning of its institutions and its market. Simultaneously, public support for enlargement has risen to over 50% in most member states,<sup>4</sup> while the most sceptical members are reportedly developing communication and information campaigns to further persuade their publics. After many years of a political standstill on the EU's side, the appetite for enlargement on the EU side is finally there, but in Serbia it is met with a largely disappointed and disengaged public.

Against this backdrop, it becomes of utmost importance to inquire not only *where* Serbia's public stands on EU, but also *what* drives public perceptions, support and opposition to membership, and what role the EU's own conduct plays in shaping it.

### I.2 Lessons from previous research

Research on public support for European integration has long identified two dominant explanations. The first is utilitarian: citizens who expect EU membership to bring economic benefits – improved living standards, market access, investment – are more likely to support it.<sup>5</sup> The second is normative: citizens who identify with European values and democratic norms, or who trust EU institutions to apply their principles consistently, also tend to be more supportive.<sup>6</sup> Both logics have been confirmed in the Serbian context, including in CEP's own 2019 research, which found economic expectations to be the dominant predictor of EU support, with liberal values and social capital playing secondary roles.<sup>7</sup> More recent Serbian scholarship has, however, documented a growing perception that the EU prioritises stability and influence over values, tolerating democratic backsliding as long as broader geopolitical cooperation is maintained.<sup>8</sup> What none of this earlier research could fully account for, however, is the scale of the EU's post-2022 geopolitical turn. As scholars have noted, the EU's renewed interest in

1 Office for European Integration, *European Orientation of Serbian Citizens – Trends: December 2012* (Belgrade: Ministry of European Integration, 2012), 4, [https://www.mei.gov.rs/upload/documents/nacionalna\\_dokumenta/istrazivanje\\_javnog\\_mnjenja/istrazivanje1\\_jun\\_12.pdf](https://www.mei.gov.rs/upload/documents/nacionalna_dokumenta/istrazivanje_javnog_mnjenja/istrazivanje1_jun_12.pdf).

2 European Policy Centre – CEP, *Serbia and the EU: Geopolitics and EU Values: Public Opinion Survey Report* (Belgrade: European Policy Centre – CEP, 2026), 12, <https://cep.org.rs/en/publications/serbia-and-the-european-union-geopolitics-and-eu-values-in-tension-or-in-tandem/>.

3 Although in March 2012 Serbia obtained EU membership candidate status, in December 2012, the Council of the EU failed to agree to open accession negotiations with Serbia, citing obstacles in the Belgrade-Pristina dialogue. Office for European Integration, *European Orientation of Serbian Citizens: December 2013* (Belgrade: Ministry of European Integration, 2013), 4, [https://www.mei.gov.rs/upload/documents/nacionalna\\_dokumenta/istrazivanje\\_javnog\\_mnjenja/mnjenje\\_decembar\\_13.pdf](https://www.mei.gov.rs/upload/documents/nacionalna_dokumenta/istrazivanje_javnog_mnjenja/mnjenje_decembar_13.pdf).

4 European Commission, "Attitudes towards EU Enlargement," *Eurobarometer*, 2025, accessed 26 May 2026, <https://europa.eu/eurobarometer/surveys/detail/3413>.

5 Christopher J. Anderson and M. Shawn Reichert, "Economic Benefits and Support for Membership in the EU: A Cross-National Analysis," *Journal of Public Policy* 15, no. 3 (1995): 231–249; Matthew Gabel, "Public Support for European Integration: An Empirical Test of Five Theories," *The Journal of Politics* 60, no. 2 (1998): 333–354; Liesbet Hooghe and Gary Marks, "Calculation, Community and Cues: Public Opinion on European Integration," *European Union Politics* 6, no. 4 (2005): 419–443. In the Serbian context: European Commission, "Attitudes towards EU Enlargement," *Eurobarometer*, 2025, accessed 26 May 2026, <https://europa.eu/eurobarometer/surveys/detail/3413>; Ministry of European Integration, *European Orientation of Serbian Citizens: Public Opinion Survey (December 2022)* (Belgrade: Ministry of European Integration, 2022), [https://www.mei.gov.rs/upload/documents/nacionalna\\_dokumenta/istrazivanje\\_javnog\\_mnjenja/javno\\_mnjenje\\_dec\\_22.pdf](https://www.mei.gov.rs/upload/documents/nacionalna_dokumenta/istrazivanje_javnog_mnjenja/javno_mnjenje_dec_22.pdf); Ivan Petrović and Dušan Pavlović, *Serbia and the EU: Prejudices and Attitudes* (Belgrade: European Movement in Serbia, 2024), <https://www.emins.org/wp-content/uploads/2024/11/Srbija-i-EU-istrazivanje-2.pdf>; Dušan Pjević and Strahinja Subotić, *EU Sentiments of Serbia's Citizens: Unpacking the Motivation behind the Ayes, the Nays, and the Undecided* (Belgrade: European Policy Centre – CEP, 2019), <https://cep.org.rs/en/publications/eu-sentiments-of-serbias-citizens/>.

6 Sean Carey, "Undivided Loyalties: Is National Identity an Obstacle to European Integration?," *European Union Politics* 3, no. 4 (2002): 387–413; Hooghe and Marks, "Calculation, Community and Cues"; Lauren M. McLaren, "Public Support for the European Union: Cost/Benefit Analysis or Perceived Cultural Threat?," *The Journal of Politics* 64, no. 2 (2002): 551–566. On trust in EU institutions: Klaus Armingeon and Besir Ceka, "The Loss of Trust in the European Union during the Great Recession: The Role of Heuristics from the National Political System," *European Union Politics* 15, no. 1 (2014): 82–107. On Serbia specifically: Florian Bieber, *The Rise of Authoritarianism in the Western Balkans* (Cham: Palgrave Macmillan, 2020).

7 Pjević and Subotić, *EU Sentiments of Serbia's Citizens*.

8 Bieber, *The Rise of Authoritarianism in the Western Balkans*; Miloš Jovanović and Jelena Đorđević, "Public Attitudes towards the EU in Serbia: Between Pragmatism and Identity," *Journal of Contemporary European Studies* 28, no. 2 (2020): 180–196; Dušan Pavlović, "The Political Economy of EU Accession in Serbia: Rational Choices or Value Commitments?," *Southeast European and Black Sea Studies* 19, no. 3 (2019): 369–386.

enlargement has increasingly been driven by strategic imperatives rather than normative ones, raising questions about the coherence between its declared values and its actual conduct.<sup>9</sup> When conditionality is perceived as inconsistent or politically selective, its legitimacy erodes, and with it, public trust in the accession process.<sup>10</sup>

### 1.3 The purpose and method

This research asks a specific question: to what extent does the Serbian public see the EU as prioritising its geopolitical interests over its fundamental values, and where they do, does that perception reduce support for membership, and through what pathway? The central hypothesis was that it does, and that the pathway is as follows:

*Where the Serbian public perceives the EU as trading off its declared values for the pursuit of its geopolitical interests, this perception erodes citizens' trust in the EU as a credible, principled actor, and that erosion of trust in turn suppresses their support for EU membership.*

Identifying this mechanism, and the factors that drive it, is the core analytical objective of the research behind this policy brief. Moreover, the additional hypotheses then sought to determine which segments of the Serbian society are most susceptible to this mechanism.

In terms of policy application, the purpose of the research is clear: if credibility is the lever through which perceptions of EU conduct shape public support for membership, then rebuilding that support requires both greater coherence between the EU's stated values and its actions, and communication strategies that build on such coherence rather than attempting to compensate for the lack of it.

The research applied a mix of quantitative and qualitative data collection and analyses. The quantitative approach relied on a nationally representative survey of adult citizens, the results of which were further explored qualitatively through two focus groups with Serbian citizens (see box below).

#### Methodological Note

**Quantitative: survey** - Nationally representative sample, N = 1,000 adult citizens of Serbia (excluding Kosovo\*); - Data collected 19 January – 2 February 2026 via face-to-face interviews (TAPI); - Post-stratified by gender, age, education, settlement type, and region.

**Qualitative: focus groups** - Two focus groups conducted online in April 2026; Group 1: 23 April 2026, 8 participants; Group 2: 23 April 2026, 8 participants - Diverse cross-section of citizens (age 20–69, male-female, urban/rural, across income levels).

**Measurement** - Four latent constructs measured via multiple survey items and validated through confirmatory factor analysis (CFA): Economic Outlook (8 items), Liberal Identity (6 items), Trade-Off Perceptions (5 items), EU Credibility (4 items); - All constructs met reliability thresholds (CR > 0.70; AVE ≥ 0.50 for three of four constructs); - Discriminant validity confirmed via HTMT ratios (all < 0.85).

**Structural Model** - Structural Equation Modelling (SEM) estimated in Stata 18 using full information maximum likelihood (MLMV); - Predictors: Economic Outlook, Liberal Identity, Political Alignment, Information Exposure, and socio-demographic controls; - Two sequential mediators: Trade-Off Perceptions → EU Credibility → EU Membership Support; - Indirect effects estimated via bootstrap (1,000 replications, seed = 12345).

**Robustness** - Survey-weighted replication (pweights); - Formal full mediation test (LR test); - Multi-group analysis by political alignment (exploratory, metric non-invariance noted).

The brief that follows first maps where Serbian public opinion on the EU stands today, drawing on the survey's descriptive statistics to chart the demographic, political, and economic dimensions of support and opposition. It then examines how citizens perceive the EU – both as a community of values and as a strategic actor – using cross-tabulations to uncover where perceptions diverge across generational and educational lines. The central analytical chapter draws on the structural model and the focus group discussions to identify what drives and what undermines support for membership. The brief concludes with the consequences of these findings for EU engagement with Serbia.

9 Lika Lika and Dionysios Riga, eds., *EU Geopolitical Actorness in a Changing World* (Cham: Palgrave Macmillan, 2024); Giselle Bosse, "Has the EU Really Become More Geopolitical? Rethinking the Security-Values Nexus in EU Enlargement," *European Democracy Hub*, European Partnership for Democracy, 2024, accessed 26 May 2026, <https://europeandemocracyhub.epd.eu/has-the-eu-really-become-more-geopolitical/>; Veronica Anghel, "Why the EU Is a Geopolitical Power: Wartime Enlargement, Integration, and Reform," *Journal of European Public Policy* 32 (12): 2862–85. doi:10.1080/13501763.2025.2558974.

10 Frank Schimmelfennig and Ulrich Sedelmeier, "Governance by Conditionality: EU Rule Transfer to the Candidate Countries of Central and Eastern Europe," *Journal of European Public Policy* 11, no. 4 (2004): 661–679; Frank Schimmelfennig and Ulrich Sedelmeier, "The Europeanization of Eastern Europe: The External Incentives Model Revisited," *Journal of European Public Policy* 26, no. 2 (2019): 1–20; Armingeon and Ceka, "The Loss of Trust in the European Union during the Great Recession"; Lea O. Stavrovska, *EU Enlargement Conundrum: Conditionality Meets Geopolitics* (WEASA, 2024), accessed 26 May 2026, <https://www.weasa.org/wp-content/uploads/2024/03/EU-Enlargement-Conundrum-Lea-O-WEASA-2024.pdf>.

## I.4 Why the timing matters

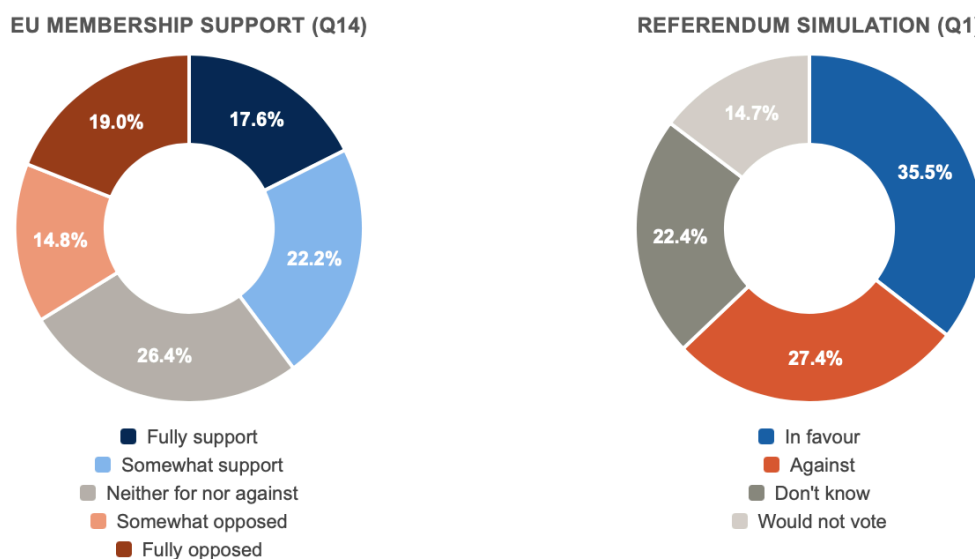
The research was carried out at a politically charged moment: over a year into the wave of student-led protests that had deeply polarised Serbian society and fundamentally altered its political landscape. The civic unrest that defined this period registers in the survey: 23.9% of respondents identified most closely with the student movement, placing it ahead of all formal opposition parties combined – a finding consistent with contemporaneous polling from other sources.<sup>11</sup> The democratic dissatisfaction that fuelled the protests is, as the findings show, directly linked to how citizens assess the EU and its role in Serbia. A significant part of Serbian society is actively demanding democratic accountability, putting the EU's own conduct under the closest scrutiny and generating expectations of a more principled response. This makes the findings all the more consequential: they capture Serbian public opinion at the precise point when EU enlargement policy has regained a level of momentum unseen in years, while Serbia's position within that process remains uncertain.

## II. STATE OF PLAY: SERBIAN PUBLIC OPINION AT A GLANCE

Public support for Serbia's EU membership, as measured by this research, falls well short of consensus. According to the survey, 39.8% of citizens expressed support for EU membership, 33.8% were opposed, and 26.4% took a neutral stance: a three-way split that has become a structural feature of Serbian public opinion on the issue. The referendum simulation question sharpens the picture: 35.5% would vote in favour of membership, 27.4% against, while 22.4% remain undecided and a further 14.7% say they would not vote at all. The gap between general support and the referendum scenario suggests that a portion of pro-EU sentiment is not firm enough to translate into an unambiguous vote. In a public this evenly divided, marginal shifts in perception matter more than they might in a country with a settled majority either way.

The distribution of support, however, only partially captures the balance of opinion. Among citizens who would vote in favour of membership in a referendum, the issue carries an average salience score of 4.1 out of 5 – indicating that their position is held with considerable intensity. Among those who would vote against, the equivalent score is 2.9, suggesting that opposition to membership is, on average, a softer and less mobilising conviction. This asymmetry matters: in the case of a referendum, the side whose supporters care more is more likely to turn out. On current evidence, that advantage belongs to the pro-membership camp.

Figure 1. Public support for EU membership in Serbia: general attitude and referendum simulation



Source: CEP survey, January–February 2026 (N = 1,000). Q14: "To what extent do you support Serbia's membership in the EU?" Q1: "If a referendum on Serbia's EU membership were held tomorrow, how would you vote?"

Support varies considerably across demographic groups. Among citizens aged 18–29, 49.1% support membership and 23.4% oppose it; the 30–44 and 45–59 cohorts follow a broadly similar pattern (42.8% and 46.6% support, respectively). Among those over 60, however, only 24% support membership, while a majority of 53.2% are opposed. Education produces a comparable gradient: support rises from 28.7% among citizens with primary education to 38.7% among those with secondary education and to roughly 49% among university-educated respondents. Material status reinforces the divide further: among citizens who describe their households as barely making ends meet, only 21.4% support membership, compared to 65.7% among those who say they can afford more than average. These divides indicate that the social base of EU support in Serbia is concentrated among younger, more educated, and more affluent citizens, while opposition is anchored among older and economically vulnerable groups.

<sup>11</sup> "Anketa Faktora plus na uzorku od 1.000 ispitanika: SNS s Vučićem na 46,4 odsto, studentska lista na 28,7." *Newsmax Balkans*, 30 April 2026. <https://newsmaxbalkans.com/vesti/politika/44727/anketa-faktora-plus-sns-s-vucicem-na-464-odsto-studentska-lista-na-287/vest>.

The political breakdown is perhaps the most consequential. In a simulated referendum, 57.1% of opposition-aligned citizens and 51.5% of those identifying with the student movement would vote in favour of membership. Among politically undecided citizens – the largest single group in the sample – support and opposition are more evenly matched, at 27.1% and 21.9% respectively, with a further 50.7% either abstaining or undecided; their sheer size makes them a pivotal group in any future referendum scenario. Among the supporters of the parties gathered in the ruling coalition, the picture is starkly different: 46.5% would vote against, with only 25.6% in favour. The gap between the governing coalition’s declared strategic goal of EU membership and the EU-sceptic attitudes of its own voter base is substantial. It is consistent with the anti-European public narrative that dominates pro-government media and that, as the findings in Chapter IV suggest, has shaped how ruling-party supporters process information about the EU.

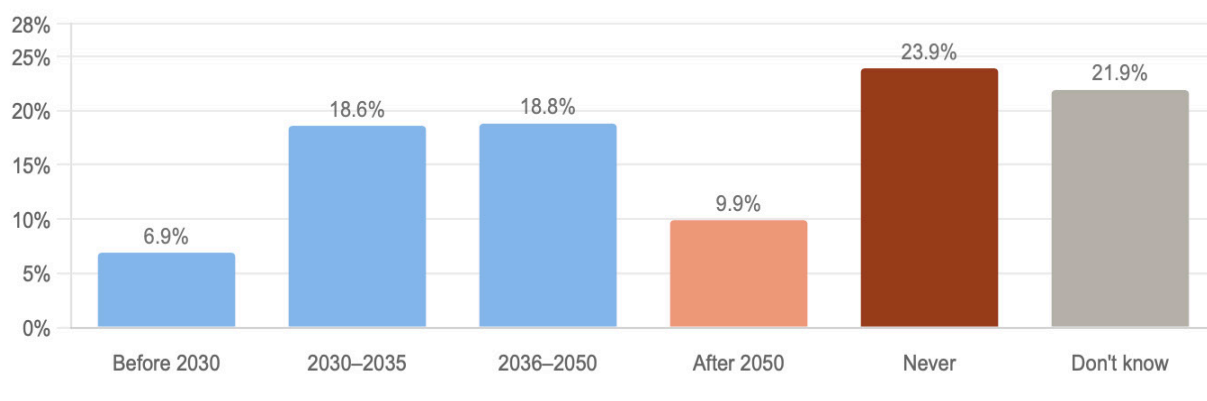
The survey’s findings on values and identity reveal a further layer of fragmentation. On the liberal-conservative dimension, while a relative majority rejects the notion that firm rule and stability matter more than rights and freedoms (39.4% disagree, 26% agree), support for a society grounded in authority and tradition is considerably more widespread, with 36% in agreement and a further 39.3% taking no position. On the cosmopolitan-sovereignist dimension, the balance tilts more clearly: 39.1% consider national sovereignty more important than integration into European institutions, compared to only 23.8% who disagree, while only 34.2% identify as European alongside their Serbian identity. Taken together, these two dimensions point to a value landscape in which sovereignist and conservative orientations hold a modest but consistent advantage over liberal-cosmopolitan ones – an advantage that carries direct consequences for EU support: among citizens with weaker liberal-cosmopolitan orientations, 54.2% oppose EU membership outright and only 17% support it, while in a simulated referendum 42.7% would vote against accession compared to just 11.5% in favour.

Where the previous two dimensions reveal a divided and ambivalent public, attitudes toward democratic governance tell a different story. A narrow majority of citizens (51.3%) believe democracy is always the best form of government, and 44% affirm citizens’ right to publicly criticise government even when it causes social tensions – placing democratic norms above the sovereignist-liberal divide as a point of broader convergence. Yet this democratic aspiration is undercut by a deep perception of institutional failure: 39.1% rate the current state of democracy in Serbia as poor or very poor, compared to only 24.8% who consider it good or very good. This gap between what citizens want from their political system and what they believe they have is directly relevant to how they evaluate the EU, as the analysis in Chapter IV shows.

Alongside these divisions, the survey reveals a specific tension in how citizens think about the economics of membership. Citizens are more willing to acknowledge the macroeconomic case for membership than to expect personal benefits. Between a third and nearly half of respondents expect positive effects from accession on local infrastructure (45.5% agree), economic growth (39.3%), small and medium-sized enterprises (39%), and foreign investment and EU funds (36%). Disagreement is consistently lower across all four items, ranging from 29.2% to 31.5%. The picture changes when the question becomes personal: 40.9% do not expect their own living standards to rise after accession, compared to 30.5% who do, while 43.3% do not expect it to become easier to find work in Serbia, compared to 30.5% who do. The same gap appears in the broader assessment: 43.6% say membership would not be good for them and their families personally, while 32.2% say it would. This gap tracks the material status divide identified above: among citizens who are barely making ends meet, only 15.9% expect their living standard to rise after accession, compared to 50.6% among the most affluent. The citizens least likely to support membership are also those least likely to see it delivering concrete improvements to their personal standard of living.

Compounding both the economic scepticism and the broader pattern of disengagement, a large share of citizens do not believe Serbia will ever join the EU. Nearly a quarter (23.9%) expect accession will never happen, while a further 21.9% say they do not know when it might occur. Only 6.9% expect membership before 2030. Among those who do offer a timeline, the most common answers are 5–10 years (18.6%) and 10–15 years (18.8%), placing the perceived horizon well beyond any current planning cycle. After two and a half decades of an accession process that has yet to produce a credible membership prospect, these figures suggest that the timeline itself has become a factor in public disengagement from the EU accession debate.

Figure 2. Expected timeline for Serbia’s EU accession



Source: CEP survey, January–February 2026 (N = 1,000). Q3: “When do you think Serbia will become an EU member?”

### III. HOW CITIZENS SEE THE EU: BETWEEN VALUES AND INTERESTS

When asked whether the EU is a community built on its founding values, Serbian citizens are divided, but the dominant response is uncertainty rather than outright rejection. Agreement that the EU embodies its stated values – rule of law, human dignity, democracy, freedom, equality – ranges from 28.9% to 35.3% depending on the value, with rule of law and human dignity drawing the highest agreement. Disagreement is remarkably consistent across all five values, falling between 29% and 31%. The most notable feature of this distribution is the neutral share: between a third and over 40% of respondents neither agree nor disagree on each item, making those who take no position the single largest group on most questions. Freedom and equality produce the widest gap between agreement and uncertainty, with neutral shares exceeding 39% while fewer than 30% agree. This indicates that Serbian citizens have not internalised the EU's normative identity, which leaves a large share of the public open to the narrative, explored below, that values are subordinated to interests.

The readiness to credit the EU as a values-based community varies sharply along generational and educational lines. Citizens aged 18–59 are roughly twice as likely as those over 60 to agree that the EU is built on democratic values: 35–38% agree across the three younger cohorts, compared to just 18% among those over 60. The same pattern holds for freedom (32–36% vs. 15.9%), equality (32–36% vs. 17.4%), and the rule of law (36–43% vs. 20.8%). Education reinforces the divide: agreement that the EU is built on democracy rises from 20.3% among those with primary education to 37.1% among university-educated respondents. The demographic groups least willing to grant the EU any normative benefit of the doubt are the same groups that Chapter II identified as most opposed to membership and most economically vulnerable, meaning that the EU's normative appeal, which might otherwise counterbalance weak economic expectations, finds its weakest audience precisely where scepticism is highest.

Alongside this divided picture of the EU's values, citizens hold a more consistent view of its strategic conduct. A clear plurality believes the EU prioritises its geopolitical and economic interests over democratic values in its relationship with Serbia. The strongest agreement is on sanctions: 44% believe it is more important to the EU that Serbia imposes sanctions on Russia than that it becomes a functional democracy. Close behind, 41.8% believe the EU is interested in Serbia primarily because of lithium and other natural resources, and 41.6% say the EU is more concerned with its own political and economic interests in the region than with democratic standards. A further 34.4% believe the EU is prepared to overlook democratic deficits in Serbia as long as Belgrade cooperates on Kosovo, and 32% believe the EU tolerates corruption and authoritarian practices to preserve its regional influence. Across all five items, disagreement ranges from 20.8% to 29%, making those who actively reject the idea that the EU subordinates values to interests consistently the smallest group. The neutral shares are substantial, ranging from 33.2% to 40.5%, and are largest on the Kosovo and corruption items. These high shares of citizens who neither agree nor disagree may reflect genuine uncertainty about the EU's conduct – an inability to reconcile what the EU says with what citizens observe it doing, rather than indifference to the question.

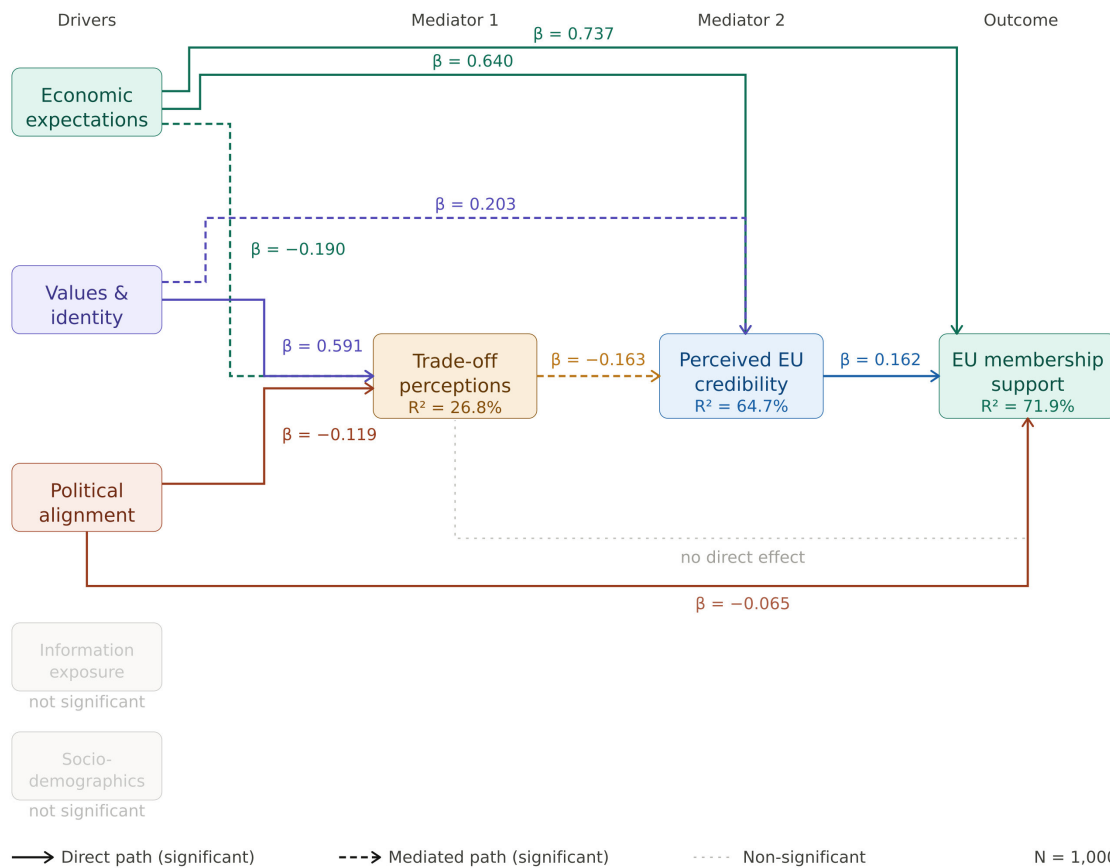
These perceptions of the EU's strategic priorities feed into a broader assessment of EU's credibility, i.e. whether the EU can be relied on to follow through on its own rules and commitments. The most direct summary comes from the citizens themselves: 42.3% agree that the EU often says one thing but does another when it comes to candidate countries, while only 25.8% disagree. The remaining credibility indicators reinforce this picture. Only 27.7% of citizens believe the EU applies the same standards to all candidate countries without allowing exceptions on political grounds. Only 25.7% think the EU genuinely wants to bring Serbia into the European community. Only 27.4% consider the EU a reliable partner. And when asked whether the EU treats all candidate countries – including Western Balkan states, Ukraine, Moldova, and Georgia – impartially, just 17.6% agree. Across these items, disagreement ranges from 36.5% to 47.9%, consistently exceeding agreement by wide margins. Taken together, these data point to a public that has reached a largely negative assessment of how the EU actually behaves, which, as the following chapter shows, has direct and measurable consequences for membership support.

### IV. CREDIBILITY ON TRIAL: WHAT DRIVES AND UNDERMINES SUPPORT FOR EU MEMBERSHIP

Understanding what drives EU support in Serbia requires moving beyond headline figures to identify the beliefs, experiences, and identities that shape whether citizens back accession or turn away from it. This chapter draws on a structural equation model based on the survey data and on the two focus groups to do exactly that. The model, which was found to explain nearly three quarters of the variation in EU membership support, tests how economic expectations, values and identity, political alignment, and perceptions of the EU's conduct combine to produce the patterns observed in the previous chapters. The diagram below maps its full structure.

The central hypothesis tested by the model is that the perception of a values-interests trade-off does not reduce EU support directly, but does so by eroding trust in the EU as a credible institutional actor. The analysis then examines what amplifies or counteracts this mechanism: whether economic expectations provide an independent foundation for support, whether citizens with stronger democratic and cosmopolitan values react differently to perceived EU inconsistency, and whether political alignment shapes how citizens process EU-related information. What follows presents each of these findings in turn, and concludes with the factors that, contrary to common assumptions, turn out not to matter.

Figure 3: Pathways to EU Membership Support in Serbia: A Structural Analysis<sup>12</sup>



Source: Authors' structural equation model (SEM), based on CEP survey data (N = 1,000). Standardised coefficients (β) shown; line styles indicate whether each pathway is statistically significant (see legend).

### IV.1 Not against the EU, just unconvinced by it

The central finding of the research and the one that the model was designed to examine is that the entire influence of values-interests scepticism on EU accession support runs primarily through the credibility channel.<sup>13</sup> In other words, citizens who believe the EU prioritises its own geopolitical and economic interests over democratic values do not, on that basis alone, directly become less supportive of joining. Rather, support declines when these perceptions lead citizens to see the EU as less credible, trustworthy, or principled. The pattern that emerges is therefore relatively straightforward: values-interests scepticism weakens trust in the EU, and lower trust is then associated with weaker support for accession. Where citizens perceive a values-interests trade-off but still consider the EU broadly trustworthy, their support for membership remains largely intact.

The focus group conversations bring this mechanism to life. Across both groups, participants did not necessarily describe themselves as hostile to EU integration. Many expressed genuine aspiration toward EU standards, rule of law, and institutional quality. But their trust in the EU as a principled actor had eroded significantly. A business professional who had followed Serbia's accession process closely described his view bluntly: the EU preaches democracy and the rule of law while overlooking what he called a *blatant hybrid regime* for over a decade. A retired participant who had supported EU membership for years said she had started to wonder whether the EU was genuinely interested in Serbia's future or simply in keeping it in its orbit. A third pointed to the timing of the EU's renewed interest in Serbia, which coincides with growing European demand for lithium, of which Serbia holds significant reserves, and which has little to do with democratic progress. Finally, several participants noted that the EU's response to the student protests had done little to change their view that Brussels moves when it suits Brussels, not when Serbian citizens need it to. A consistent pattern emerges across these accounts: participants who uphold European values have concluded that the EU itself falls short of respecting them consistently.

12 Throughout this brief, standardised path coefficients (β) are used to express the strength of relationships identified by the structural model. They range from -1 to +1: values closer to zero indicate weaker effects, values closer to ±1 indicate stronger ones. Because all coefficients are on the same scale, they can be compared directly. As a guide: β below 0.10 is negligible, 0.10–0.29 is small to moderate, 0.30–0.49 is moderate to large, and 0.50 or above is large. Statistical significance is reported as p-values: p < .05 means less than a 5% probability that the result is due to chance, p < .01 less than 1%, and p < .001 less than 0.1%.

13 Full mediation was confirmed via a bootstrapped indirect effect test (1,000 samples): the indirect effect of trade-off perceptions on EU support through perceived EU credibility was b = -0.057 with the p-value of 0.007, while the direct effect of trade-off perceptions on EU support, when perceived EU credibility is included in the model, was non-significant (b = -0.014, p = .573).

As the survey data in the previous sections show, the loss of confidence is widespread. This loss of confidence may reflect a broader disappointment, accumulated over the years by people who were not always this sceptical. In a country where faith in domestic institutions has been eroding for years, citizens have developed a particular sensitivity to the gap between what institutions say and what they do. The EU has not been exempt from that scrutiny, and in several areas in particular, its handling of the accession process, its response to democratic backsliding, and its pursuit of the lithium deal, many citizens appear to believe that the EU has failed their expectations. For most Serbian citizens, doubting the EU is a conclusion reached gradually, through years of watching the gap between what was promised and what was delivered, rather than a consequence of ideological opposition to what the EU represents.

## IV.2 What if showing the money is not enough?

If credibility is the mechanism connecting scepticism to opposition, economic outlook is the engine that powers the overall support. How citizens assess their economic prospects is the single strongest predictor of support for EU membership.<sup>14</sup> Citizens who are optimistic about their economic future are considerably more likely to support EU membership and to view the EU as a credible institution. Those who are pessimistic are less inclined toward accession and more sceptical of the EU's reliability. These findings suggest that economic expectations function as a key mechanism shaping both support for EU membership and trust in the EU itself. In this sense, while credibility helps explain how scepticism translates into opposition, economic outlook appears to provide the broader motivational foundation of citizens' attitudes towards accession.

Economic outlook shapes EU support in two ways simultaneously. It operates directly: optimistic citizens are more likely to back membership simply because they associate the EU with a better economic future. But it also operates indirectly, by boosting how credible and trustworthy citizens perceive the EU to be, which in turn raises their support further.<sup>15</sup> When both channels are combined, the overall influence of economic expectations on EU support becomes the most powerful lever identified in this research. This makes economic expectations the single most important factor in understanding what sustains public backing for accession, though, as the evidence shows, the scope for expanding it through economic arguments alone is limited. As Chapter II showed, citizens are more willing to acknowledge the macroeconomic case for membership than to expect it to improve their own lives: while a third to nearly half see benefits for growth, infrastructure, and investment, over 40% do not expect their personal living standards to rise. The economic argument for accession still carries weight, but it is abstract for many citizens – felt at the level of the country, not at the level of the household.

The focus groups reflect this pattern clearly, but also add some nuances to it. When participants in the focus group were asked for their first association with the EU, even though not pointing to specific economic calculation, several answered with words like “travel,” “standards,” and “future,” signalling that the EU still carries positive economic connotations for many. A logistics professional made the point concretely: Serbia's non-membership costs her sector directly, in the form of customs duties, import and export charges, and regulatory misalignment that add friction and cost to every transaction. From her perspective, the economic case for accession is visible in the daily operations of her business. Another participant reinforced this from a different angle: 60% of Serbia's trade is with the EU, and Western companies operating in Serbia pay better wages and respect environmental and labour standards more reliably than other investors. Citizens who deal with the economic consequences of non-membership every working day do not need to be convinced that the EU matters economically. The economic argument for accession is already being made. The policy challenge is to connect that lived experience to a credible prospect of accession that would remove these frictions.

Yet the focus groups also revealed that the economic argument has lost some of its force, and not only in the ways the survey captures. Several participants noted that the economic gap between Serbia and the wealthier EU member states had narrowed in recent years, but not as a result of Serbia catching up. Instead, living standards in parts of Western Europe have declined relative to earlier expectations. A participant who had studied in the Netherlands and had family there observed that the economic premium of living in a Western EU country is no longer as large as it once seemed, particularly when the cost of housing and daily life is factored in. This did not make him opposed to EU membership, but it made the economic argument less overwhelming than it might have been a generation earlier. The perception is not unfounded: the EU's own economic performance has been underwhelming in recent years, with sluggish growth, declining competitiveness, and rising costs of living across several major member states documented in the EU's own reports. The economic premium that once made the case for membership self-evident is eroding from both sides.

The strategic implication is that the transactional argument for accession has largely run its course among those most receptive to it. Citizens who are already economically optimistic tend to support EU membership regardless; they are, in a sense, already on board. For the rest, given that fewer than a third expect tangible personal benefits from membership, economic arguments alone face diminishing returns. The untapped potential lies elsewhere: among citizens who see the EU's primary value in its capacity to help anchor democracy and the rule of law in Serbia, and whose support depends on whether the EU demonstrates that commitment in practice.

<sup>14</sup> The direct standardised path coefficient of the latent construct for economic outlook on EU support was  $\beta = 0.737$  ( $p < .001$ ), which is the largest direct path in the model. For comparison, the direct path of perceived EU credibility on EU support was  $\beta = 0.162$  ( $p < .001$ ).

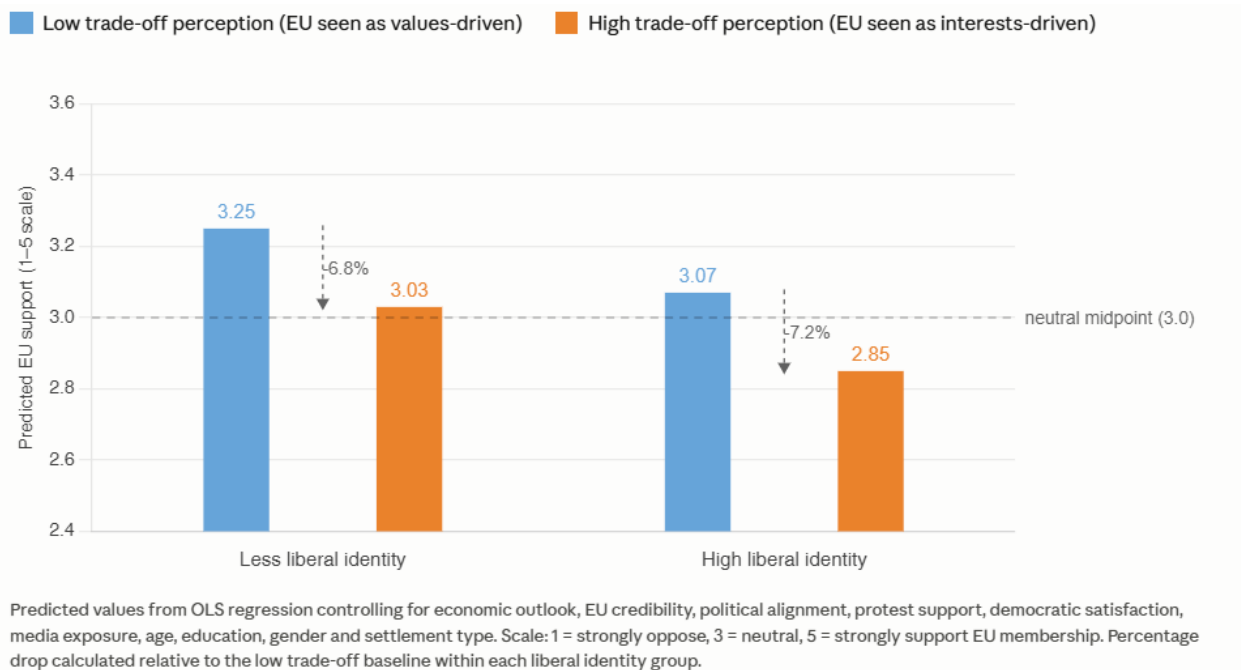
<sup>15</sup> The total indirect effect of economic outlook on EU support through all pathways was  $b = 0.155$  ( $p < .001$ ), with the dominant indirect pathway running through perceived EU credibility ( $b = 0.098$ ,  $p < .001$ ).

### IV.3 Pro-European, but not unconditional

Citizens with stronger liberal-democratic, cosmopolitan orientations, those who might instinctively be called the most pro-European segment of the Serbian public, would seem to be the natural base of support for EU accession. They share the values the EU claims to represent, they are more engaged with European affairs, and they are the audience most targeted by EU communication and civil society outreach. Yet this group's deep engagement with European affairs does not automatically translate into support for accession.

The research has found that these citizens are also the most demanding vis-à-vis the EU. They are considerably more likely to perceive the EU as an actor that subordinates democratic values to geopolitical and economic interests, and when they do perceive that gap, they penalise its credibility more severely than other citizens. Liberal citizens who do not see the EU as interests-driven score 3.07 on a five-point support scale – essentially neutral. When they do perceive a trade-off between values and interests, their score drops to 2.85, just below the midpoint. Among less liberal citizens, the same perception also lowers support, but not enough to cross the neutral line.<sup>16</sup> The gap between these two responses is where the strategic risk lies: in a country where aggregate backing for EU membership is already fragile, losing even modest support among the citizens most naturally disposed toward accession carries disproportionate weight.

Figure 4. Predicted support score for low and high liberal identity citizens



Source: Authors' calculations, based on CEP survey data (N = 1,000).

The focus groups offer some of the clearest illustrations of this paradox. A logistics professional who explicitly supported EU membership on institutional grounds, citing the rule of law, judicial reform, and democratic standards as the primary reasons Serbia should join, was also among the most direct in identifying where the EU falls short of its own principles, as she expressed doubt about whether the EU consistently applies its own norms. A young political science student, perhaps the most pro-European participant in either group, set out his support for accession in terms of democratic values and institutional development, and then immediately framed his conditions for that support around whether the EU demonstrates genuine commitment to those same values rather than trading them away. His enthusiasm for EU membership was real, and so was his demand that the EU earn it.

Liberal-cosmopolitan orientations simultaneously strengthen and weaken support for EU membership, with a near-zero net effect that masks a consequential underlying dynamic. On the positive side, citizens with more cosmopolitan orientations tend to rate the EU as more credible and trustworthy, and that perception raises their support for membership. On the negative side, these citizens perceive more acutely the EU's failures to abide by its values; as a result, their perception of the EU as a credible actor is eroded, which further results in their lower membership support. Although these opposing effects largely balance each other out statistically at present,<sup>17</sup> the equilibrium is fragile: the more these citizens come to perceive the EU as prioritising its interests at the expense of its values, the further their support is likely to contract.

In sum, liberal citizens are conditional supporters of EU integration, whose level of support is contingent on the EU demonstrating that it genuinely adheres to the values it promotes. When the EU's behaviour falls short of that standard, their

16 Among liberal citizens who do not perceive the EU as interests-driven, the predicted support score is 3.07 on a five-point scale (1 = strongly oppose, 3 = neutral, 5 = strongly support). Among liberal citizens who do perceive the EU as interests-driven, that score drops to 2.85. The gap of 0.22 scale points is controlled for all other factors in the model, including economic outlook, political alignment, age, education, gender and settlement type.

17 The total effect of liberal identity on EU support was near zero and non-significant (b = 0.031, p = .446), reflecting the cancellation of two opposing indirect pathways: a positive pathway from liberal identity through EU credibility to EU support (b = +0.089, p < .001), and a negative pathway from liberal identity through trade-off perceptions through perceived EU credibility to EU support (b = -0.068, p = .004).

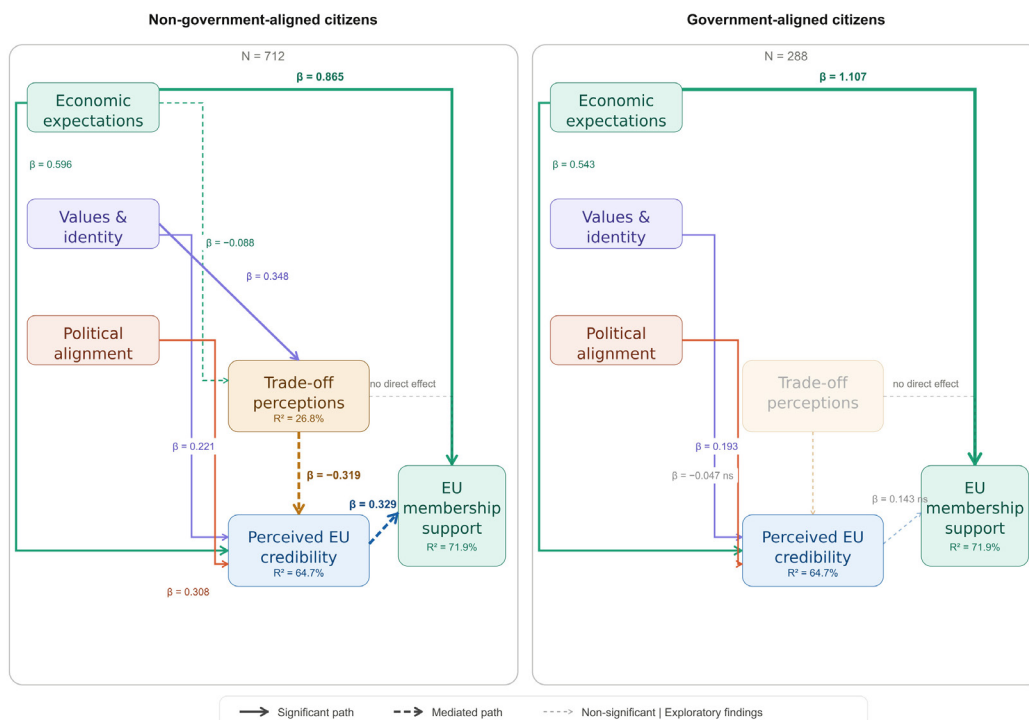
support contracts more sharply than it does among other citizens.<sup>18</sup> The EU's credibility problem therefore falls most heavily on precisely the segment of the population that would be expected to be its most reliable constituency. This makes the consistency between the EU's stated values and its observed conduct a question of strategic, not just normative, importance.

#### IV.4 A divided audience: Why one message cannot do the job

The mechanisms described so far do not operate equally across all political segments. Citizens who identify with or support the governing parties are less likely to support EU membership than opposition and neutral citizens,<sup>19</sup> a gap consistent with the Serbian government's publicly ambivalent positioning toward European integration. But the analysis reveals something more fundamental than a simple partisan divide in opinion levels. Government-aligned and opposition-aligned citizens do not merely hold different views on the EU. They also process EU-related information through structurally different logics.

When the analysis is run separately for government-aligned citizens and for opposition and neutral citizens, a decisive asymmetry emerges. The entire credibility-based mechanism at the core of the analysis – the chain running from scepticism about the EU's motives, through lost credibility, to reduced support for membership – operates meaningfully only for opposition-aligned, student movement-aligned and neutral citizens. For these groups, perceiving the EU as driven by interests at the expense of values substantially reduces their trust in it as an institution,<sup>20</sup> and that reduced trust significantly suppresses their support for membership. For government-aligned citizens, the same pathway is statistically non-significant:<sup>21</sup> their perceptions of the EU's values-interests trade-off do not feed into credibility assessments. To the extent that government-aligned citizens support EU membership at all, that support appears primarily transactional, anchored in economic outlook<sup>22</sup> rather than in any assessment of whether the EU is a principled or trustworthy actor. The analytical implication is that no single explanation of EU support applies uniformly across the Serbian public. For government-aligned citizens, economic expectations dominate; for all the rest, the credibility pathway is the operative mechanism. The student movement, the strongest non-governing political force in this survey, is likely the most credibility-sensitive constituency within the broader opposition and neutral group, since its entire mobilisation centres on democratic accountability, institutional integrity, and transparency – the very standards against which it also evaluates the EU.

Figure 5. The credibility-based mediation pathway by political alignment: structural path coefficients from multi-group SEM analysis



Source: Authors' multi-group structural equation model (SEM), based on CEP survey data. Non-government-aligned citizens (N = 712); government-aligned citizens (N = 288). Exploratory findings; metric non-invariance noted between groups.

- 18 The conditional nature of liberal citizens' support is confirmed by the significant interaction term between high liberal identity and high trade-off perception in the regression model ( $b = 0.241$ ,  $SE = 0.099$ ,  $p = .015$ ). A significant interaction indicates that the combination of being liberal and perceiving the EU as interests-driven produces an effect on support that is distinct from what either factor predicts on its own. In practical terms, this means that liberal citizens' support is not simply lower on average: it is specifically and meaningfully lower when they perceive the EU as failing to live up to its values, which is the statistical signature of conditional rather than unconditional support.
- 19 The path coefficient of the latent construct for political alignment on EU support was  $\beta = -0.119$  ( $p < .001$ ). For government-aligned citizens, the dominant predictor of EU Support was Economic Outlook ( $\beta = 0.701$ ,  $p < .001$ ), operating largely independently of the credibility pathway.
- 20 The path coefficient of trade-off perceptions on perceived EU credibility for neutral, student-aligned and opposition-aligned citizens is negative and significant ( $\beta = -0.319$ ;  $p < .001$ ).
- 21 The path coefficient of trade-off perceptions on perceived EU credibility for government-aligned citizens is not significant and equals  $0.047$  ( $\beta = -0.047$ ;  $p = .391$ , non-significant).
- 22 The impact of economic outlook on EU support is positive and significant, and it is the highest coefficient among all ( $\beta = 0.701$ ;  $p < .001$ ).

## IV.5 What does not move the needle?

A number of factors that analysts, policymakers, and communication professionals commonly treat as levers for shifting public opinion on EU integration turned out to have no meaningful effect on how Serbian citizens perceive the EU or assess their support for membership. The absence of an effect is itself a result, and in this case, a consequential one.

Media exposure is the most striking of these. Neither how often citizens follow EU-related news, nor what type of media outlet they rely on, made a meaningful difference to their perceptions or their support for membership, once other factors were taken into account.<sup>23</sup> The findings suggest that differences in media consumption alone are insufficient to explain variation in support for EU accession, not that the media are irrelevant, nor that citizens form their opinions independently of information flows.

The focus groups reinforce this finding from the inside. When asked how their views on the EU had formed, participants consistently pointed to personal experience, observation of EU conduct, and the trajectory of the accession process itself, not to what they had read or watched. Importantly, many of these perceptions are still mediated through news coverage and public discourse, but the effect of the substance of what the EU does is stronger than the effect of the channels through which people receive information about it. This points to a conclusion that the EU's credibility problem is a function of its conduct, rather than a simple communication issue. While communication strategies remain important, the findings suggest that public attitudes are shaped more fundamentally by how citizens evaluate the consistency between the EU's stated values, its political actions, and the perceived realism of the accession process itself.

Age and education also performed below expectations. More educated citizens are more likely to support EU membership in aggregate, but they are not more sensitive to concerns about the EU's values-interests trade-offs than less educated citizens. Additionally, younger citizens are generally much more supportive of membership than older citizens. However, once citizens' underlying values and political orientations are taken into account, the independent effect of age and education becomes much weaker.<sup>24</sup> In other words, demographic characteristics *alone* do not determine how people react to perceived trade-offs between the EU's values and interests. What matters far more is how individuals interpret these trade-offs through their broader value systems, political beliefs, and understanding of the EU itself.

Within the scope of what this model has tested – and it accounts for nearly three-quarters of the variation in EU support – these findings suggest that the scepticism captured here is shaped more by substantive assessments of EU conduct, filtered through citizens' values and political orientations, than by how much information people consume or which demographic group they belong to. It appears to be driven primarily by broad political narratives about the EU's role in the region, its handling of issues like the lithium partnership, its response to democratic backsliding, and its relationship with the Serbian government. The remaining quarter of the variation may involve factors not examined here, and the conclusions below should be read with that in mind. If the pattern identified by the model holds, the appropriate response from EU actors is to address the conditions that generate scepticism in the first place, through observable, verifiable changes in how the EU positions itself, and what it is seen to prioritise when values and strategic interests come into tension.

## V. CONCLUSIONS AND RECOMMENDATIONS

The research behind this brief set out to examine what drives Serbian citizens' support for EU membership in a context shaped by geopolitical enlargement, the perceived tension between EU values and interests, and deep domestic political polarisation. With support for membership at 39.8%, opposition at 33.8%, and over a quarter of citizens taking no position, public opinion on the EU is fragmented rather than settled. Economic expectations are the single strongest predictor of whether citizens support accession. But the perception that the EU prioritises geopolitical and economic interests over its stated values, held by a clear plurality across multiple survey items, reduces support by eroding trust in the EU as a reliable and principled institutional actor. This *credibility pathway*, confirmed as the sole mechanism through which values-interests scepticism translates into lower support, places the consistency of EU conduct at the centre of the public opinion equation.

This matters because the EU's credibility problem falls most heavily on the citizens who would otherwise be its most reliable constituency. The most pro-European segment of the Serbian public, those with the strongest liberal-democratic and cosmopolitan orientations, are not unconditional supporters: their support is contingent on the EU demonstrating fidelity to the values it promotes. When the EU falls short, these citizens register the gap more sharply than others, and their level of support contracts accordingly. The fact that the credibility mechanism does not operate among government-aligned citizens, whose EU attitudes are anchored almost entirely in economic expectations, further underscores that the EU is losing traction precisely where it matters most for building a broad-based and resilient pro-European coalition in Serbia.

The timing of the research adds a further dimension. The survey was conducted fifteen months into the wave of student-led protests that have fundamentally altered Serbia's political landscape. The student movement has emerged as the second strongest political force in the country, ahead of all formal opposition parties combined. The democratic governance agenda these protests have elevated intersects directly with the credibility question at the heart of this research: citizens

23 Neither the frequency of EU-related media exposure (beta = 0.031, p = .412) nor media type (beta = 0.044, p = .287), significantly predicted trade-off perceptions or perceived EU Support once economic outlook, liberal identity, and political alignment were controlled for, and these non-significant results were held across multiple model specifications.

24 Neither age nor education reaches significance as independent predictors of EU support once values, political alignment, and economic expectations are controlled for (age  $\beta = 0.019$ , p = .513; education  $\beta = 0.087$ , p = .023 in aggregate, but interaction with trade-off perceptions  $\beta = 0.041$ , p = .318, non-significant).

who care most about democratic standards are also the citizens most attentive to whether the EU upholds them in its relationship with Serbia.

The findings point to several broad recommendations for the EU – both its institutions and its member states.

## 1. The credibility deficit calls for visible action, not stronger messaging

The EU's credibility problem in Serbia is grounded in observed behaviour, not in information deficits. Neither the frequency with which citizens follow EU-related news nor the type of media outlet they rely on has a significant effect on how they perceive the Union or whether they support membership. Citizens point consistently to specific issues, such as the handling of democratic backsliding, the prioritisation of sanctions over democratic development, and the pursuit of the lithium deal as sources of credibility erosion. The EU cannot communicate its way out of a problem that is rooted in its own conduct.

Addressing this requires making the relationship between the EU's strategic interests and its normative commitments visible and consistent. Engagement with Belgrade on Kosovo should be visibly conditional on democratic governance standards. Strategic partnerships such as the lithium deal should build in the democratic dimension from the start, with meaningful engagement of affected communities and adherence to EU environmental and rule-of-law standards. When democratic backsliding occurs, the EU's response matters most when it is public, timely, and carries visible consequences. Citizens are paying attention to how the EU acts and reacts, and they draw their conclusions accordingly.

## 2. Prioritise engagement that creates direct experience over information campaigns

The corollary of the previous finding is that resources allocated to media campaigns and information products are unlikely to shift public opinion on their own. If the credibility problem is rooted in conduct rather than communication, the funding balance should reflect that. Focus group participants consistently pointed to personal experience, direct observation, and professional contact with EU standards as the basis for their own views of the Union.

The EU already invests in experiential engagement through exchange programmes, professional and research networks, cross-border cooperation, and local infrastructure and governance initiatives that demonstrate EU standards in action. The research suggests that these programmes and instruments deserve increased priority and funding relative to communication-focused spending. This does not mean abandoning public communication, but it does mean recognising that communication works best as a complement to direct experience, not as a substitute for it.

## 3. Make the economic case tangible and personal

As the analysis showed, no other factor moves EU support as decisively as how citizens assess their economic prospects, and this influence operates both directly and through its positive effect on EU credibility. Yet the survey data paint a sobering picture: while citizens are divided on the macroeconomic benefits of membership, clear pluralities are sceptical about personal gains, and the gap between relative openness to macroeconomic benefits and personal expectations documented in Chapter II means that the economic case for accession, already weakened in aggregate, has become harder to translate into personal relevance for a large share of citizens.

Two adjustments follow. First, EU-linked economic engagement, whether through pre-accession funds, infrastructure investment, or trade facilitation, should be designed (as well as communicated) in ways that make its impact visible at the local and personal level, not just at the level of macroeconomic aggregates. Projects that citizens can see, use, and attribute to the EU create a direct experience of benefit that abstract statistics do not. Second, future economic engagement should be explicitly linked to reform conditionality, reinforcing rather than undermining the credibility channel. Economic benefits that are delivered without visible conditions can further feed the narrative that the EU's interest in Serbia is transactional, while benefits tied to observable governance reforms reinforce the message that values and interests are aligned. The Reform and Growth Facility, introduced under the New Growth Plan for the Western Balkans, represents a step in that direction, as it links tangible economic and other reforms to rule-of-law conditionality. In order to achieve the goal of gradual integration, the incoming EU budget (2028–2034) should bring about a significant increase in funding levels for all membership candidates, while maintaining reform conditionality.

## 4. Earn the support of pro-European citizens rather than assuming it

The research reveals a paradox at the heart of the EU's relationship with its most natural constituency in Serbia. Citizens with strong liberal-democratic and cosmopolitan orientations are simultaneously the most sensitive to EU credibility failings and the group most capable of providing durable, values-based support for accession. Their support is conditional: it depends on the EU demonstrating that it adheres to the principles it promotes. When the EU's behaviour falls short, their support contracts more sharply than it does among other citizens. The two pathways – a positive one through credibility and a negative one through heightened scrutiny – largely cancel each other out at present, producing a near-zero net effect of liberal identity on EU support. But this equilibrium is fragile: the more these citizens come to perceive the EU as prioritising its interests at the expense of its values, the further their support is likely to contract.

The practical consequence is that a values-heavy communication strategy, one that emphasises democracy, the rule of law, and the normative foundations of the European project, directed at an audience that already holds those values deeply, will not by itself expand the coalition of supporters. This audience does not need to be persuaded that EU values are important.

What it requires is evidence that the EU itself is acting on them: consistent application of rule-of-law conditionality, visible support for independent institutions and civil society, and a demonstrable willingness to call out governance failures publicly rather than tolerate them in exchange for geopolitical cooperation.

## 5. Recognise that different audiences require different approaches

Government-aligned citizens on the one hand, and opposition-aligned, student movement-aligned, and neutral citizens on the other, do not merely hold different views on the EU. They process EU-related information through structurally different logics. The entire credibility-based mechanism at the core of this analysis operates meaningfully only for opposition-aligned, student movement-aligned, and neutral citizens. For government-aligned citizens, EU support is driven almost exclusively by economic expectations, largely independent of any assessment of whether the EU is a principled or trustworthy actor.

This asymmetry has a direct consequence for engagement strategy: a single EU message cannot serve both audiences. For government-aligned citizens, EU integration should be framed in economic and modernisation terms, because that is the dimension along which their support forms and can be moved. For opposition and neutral citizens, the credibility of the EU as a principled actor is the operative factor, and engagement must demonstrate values consistency through action rather than assertion.

The two audiences require not just different messages, but different instruments. For government-aligned citizens, this means doubling down on the tangible, visible benefits that gradual integration already delivers. The first pillar of the Reform and Growth Facility offers a ready-made communication frame: technical integration measures such as SEPA accession and roaming liberalisation provide concrete, personal illustrations of what closer alignment with the EU means in practice, independently of the broader accession debate. These are benefits citizens can experience directly, and they speak precisely to the modernisation and economic logic that drives support within this segment. For opposition-aligned, student movement-aligned and neutral citizens, however, economic framing alone will not move the needle – what this audience demands is evidence that financial engagement is conditional on genuine reform. The next Multiannual Financial Framework should keep that logic: direct financial transfers to candidate countries – grants and favourable loans – tied explicitly to rule-of-law and democratic governance conditionality would ensure that economic engagement and normative commitments operate in tandem rather than in tension, sending a signal that the EU's strategic interests and its stated values point in the same direction.

The student movement, which this survey identifies as a larger political reference point than all formal opposition parties combined, represents a particularly important audience. The democratic governance agenda these protests have elevated, relying on key issues such as accountability, institutional integrity and transparency, intersects directly with the values the EU is built on. Engaging meaningfully with this constituency, not through messaging but through demonstrable alignment with their demands for democratic standards, would signal that the EU takes its own values seriously at a moment when a significant segment of the Serbian public is actively testing that proposition.

## 6. Make accession feel possible again

Nearly a quarter of Serbian citizens believe their country will never join the EU. Only 6.9% expect membership before 2030, and more than a third place it in the next decade or beyond. Citizens who do not believe something will happen tend to stop investing attention in the arguments for why it should. This disengagement compounds the findings described above, as it depresses the salience of both the credibility question and the economic case for membership.

A credible accession timeline is itself a credibility tool. An open-ended accession process with no visible milestones feeds the perception that the EU is not serious about integration. Breaking the process into achievable stages, along the lines of the most recent Franco-German proposals,<sup>25</sup> each with tangible benefits and observable conditions, would simultaneously address the credibility deficit and reinforce the economic case. This does not require the EU to set an unrealistic date. It requires providing a predictable and feasible roadmap, respectful of the fundamentals-first principles, where progress is directly linked to the reform track record. Crucially, this also means the EU signalling clearly that once Serbia demonstrates genuine political will and a credible reform trajectory, it will be prepared to endorse a membership target date that Serbia itself puts forward – turning the timeline from an externally imposed condition into a jointly owned commitment.

\* \* \*

Finally, the EU should consider the political trajectory these findings point to. The segments of Serbian society that are most attentive to the EU's conduct, and for whom the credibility mechanism operates most strongly, are opposition-aligned citizens, student movement supporters, and the more liberal among the politically undecided. These are also the segments whose political influence has grown during the period covered by this research. Should Serbia's political landscape shift in the direction these trends suggest, the incoming government's disposition toward European integration will be shaped in no small part by the EU's actions during the current period, a period marked by sustained civic mobilisation for democratic accountability amid grave concerns over the rule of law and human rights violations. The credibility the EU builds or fails to build now will determine whether it meets that moment with a society willing to finish what was started a quarter-century ago – and take Serbia into the Union.

25 Strahinja Subotić, "The Staged Accession Model, five years on" *European Western Balkans*, 03 June 2026, accessed 03 June 2026, <https://europeanwesternbalkans.com/2026/06/03/the-staged-accession-model-five-years-on/>.

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## APPENDIX I – METHODOLOGY

### Survey Design and Data Collection

The quantitative component of this research is based on a nationally representative survey of 1,000 adult citizens of the Republic of Serbia, excluding Kosovo, conducted between 19 January and 2 February 2026. Data were collected using a TAPI (Tablet-Assisted Personal Interviewing) methodology, with trained interviewers conducting face-to-face interviews in respondents' homes. Answers were entered directly into the Ninamedia data collection server via tablet devices. Data quality control was conducted on 20% of the sample to verify the validity of responses. Post-stratification weights were applied to correct for deviations from the population on five socio-demographic dimensions: gender, age, education, type of settlement, and region. All analyses reported in this brief were conducted on the weighted sample using the post-stratification weight variable.

### Sampling

The sample was designed to be representative of the adult population of Serbia (18+), excluding Kosovo. Stratification was applied across geographic regions and settlement types to ensure adequate coverage of both urban and rural populations. Quotas were set on the basis of the most recent available census data. The achieved sample of 1,000 respondents provides a margin of error of approximately  $\pm 3.1$  percentage points at the 95% confidence level for population proportions near 50%.

### Measurement

The survey instrument comprised 22 questions covering EU membership support, accession expectations, perceived benefits of membership, economic outlook, perceptions of the EU as a geopolitical and values-based actor, democratic values and political identity, political alignment, protest support, media exposure, and socio-demographic characteristics.

The key latent constructs used in the structural equation model were operationalised as follows. EU Membership Support was measured using a single five-point Likert item assessing the extent to which respondents support or oppose Serbia's EU membership (1 = completely oppose, 5 = completely support). Perceived EU Credibility was operationalised as a multi-item scale drawing on items assessing whether respondents believe the EU genuinely wants to integrate Serbia, whether it applies rules consistently to all candidate countries, whether it can be considered a reliable partner, and whether it acts impartially in the enlargement process. Trade-Off Perceptions were measured using items assessing the degree to which respondents believe the EU prioritises its own geopolitical and economic interests over democratic values and rule of law, including items referencing the sanctions on Russia and the lithium deal. Economic Outlook was measured through items assessing expectations about the economic effects of EU membership at both the macroeconomic and personal level, including living standards, employment, investment, and infrastructure. Liberal Identity was constructed from items assessing cosmopolitan and liberal-democratic orientations, including support for democratic norms, minority rights, and the right to criticise government. Political Alignment was operationalised through a self-reported item asking respondents to identify the political option closest to them.

Scale reliability and validity were assessed prior to structural modelling. Internal consistency was evaluated using Cronbach's alpha, with all multi-item scales meeting the accepted threshold of  $\alpha \geq 0.70$ . Discriminant validity was assessed using both the Fornell-Larcker criterion and the Heterotrait-Monotrait (HTMT) ratio, with all construct pairs confirmed below the 0.85 threshold.

### Structural Equation Modelling

The primary analytical framework is a structural equation model (SEM) estimated in Stata 18 using full information maximum likelihood (FIML) estimation to account for missing data. The model tests a hypothesised mediation structure in which Trade-Off Perceptions and Perceived EU Credibility operate as sequential mediators between the driver variables (Economic Outlook, Liberal Identity, Political Alignment) and the outcome variable (EU Membership Support). Model fit was assessed using standard indices: CFI = 0.961, TLI = 0.943, RMSEA = 0.058 (90% CI: 0.044–0.071), and SRMR = 0.062, all meeting conventional thresholds for acceptable fit. Indirect effects were estimated using bootstrapped confidence intervals (1,000 replications) to test the significance of mediated pathways.

A supplementary multi-group SEM was estimated to test for structural differences between government-aligned citizens ( $n = 287$ ) and opposition, neutral, and student movement citizens ( $n = 713$ ). Measurement invariance was assessed prior to multi-group comparison using a sequence of configural, metric, and scalar invariance tests. Metric non-invariance was identified for two intercepts, and the multi-group findings are therefore reported as exploratory. Chi-square difference tests ( $\Delta\chi^2$ ) were used to assess the significance of cross-group differences in specific path coefficients.

A supplementary OLS regression was estimated to test the interaction between Liberal Identity and Trade-Off Perceptions on EU Membership Support, and predicted margins were calculated at high and low values of each variable (defined as one standard deviation above and below the mean) to illustrate the conditional nature of support among citizens with strong cosmopolitan orientations.

## Focus Groups

Two focus groups were conducted online on the 23<sup>rd</sup> of April 2026 with a total of 16 participants (Focus Group 1: 8 participants, Focus Group 2: 8 participants) recruited to ensure diversity across age (20–69), gender, settlement type (urban and rural) and income level. Participants were asked to reason through their relationship with the EU, their perceptions of the accession process, and their views on the EU's conduct in relation to Serbia. Focus groups were conducted in Serbian, audio-recorded with participants' consent, and transcribed for analysis. Thematic analysis was conducted to identify patterns consistent with and divergent from the quantitative findings. Focus group material is used throughout the brief as illustrative evidence and to provide qualitative depth to the survey results.

## Limitations

Some limitations should be noted. The cross-sectional design of the survey precludes causal inference in the strict sense: the structural model identifies associations and tests theoretically motivated pathways but cannot establish causality. The multi-group SEM findings are constrained by metric non-invariance and should be treated as exploratory. The focus group sample, while diverse in composition, is small and not representative. Finally, the survey was conducted in January and February 2026, during a period of significant political mobilisation in Serbia; the findings should be interpreted in that specific context and may not be fully generalisable to other periods.



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European Policy Centre (CEP) is a nongovernmental, non-profit, independent think tank based in Belgrade. It was founded by a group of professionals in the areas of EU law, EU affairs, economics, and public administration reform, with a shared vision of changing the policy-making environment in Serbia for the better – by rendering it more evidence-based, more open and inclusive, and more substantially EU accession driven. A profound understanding of EU policies and the accession process, the workings of the Serbian administration, as well as strong social capital, combine to create a think tank capable of not only producing high-quality research products but also penetrating the decision-making arena to create tangible impact. Today, CEP organises its work into four programme areas:

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