# BALKAN **BAROMETER** 2020

# PUBLIC OPINION

**Analytical report**

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# FOREWORD

Before you lies the 2020 edition of the Balkan Barometer, an annual survey of Western Balkans citizen and business perceptions produced by the Regional Cooperation Council. For the sixth time, we have attempted to present and analyse the attitudes of thousands of region's citizens and businesses across a wide array of socio-economic topics impacting everyday lives.

However, there's a stark difference between this year's Barometer edition and all those that preceded it. While the results that we present here - gathered over late 2019 and early 2020 -are ones of continued, if steady, progress, the time of its release coincides with the biggest public health and economic crisis that the region, and indeed the world, has seen in recent history. The novel coronavirus (COVID-19) pandemic has brought the world to a standstill while the governments and public health officials battle the virus spread with tools that were never seen before at this scale and magnitude. More than 3 billion people across the world are in lockdown at the time this report is released, with all of the region's citizens, apart from those providing health and essential services, sharing their fate.

While the focus at the moment is on preserving health and lives of citizens, a general consensus is forming that the region, and the world, will emerge looking differently once the immediate threat is over. Large sections of the economy have grinded to a halt during the period, creating immense pressure on businesses, particularly the SME segment which accounts for more than 90% of our economies. Unemployment is on the rise again, and the governments in the region have already hurriedly deployed initial economic stimulus programmes to alleviate the immediate negative impacts. While a lot remains unclear at this time, it is safe to assume that the period of protracted and increased volatility is upon us.

However, regardless of the immense change that COVID-19 pandemic will inflict on all of our economies when we come out on the other end, many of the issues presented in this report will still be immensely relevant, perhaps even more so than before. There is a clear need for a greater substantive engagement by the region's governments to **improve the public's severely shaken confidence in their institutions**. The COVID-19 crisis could present an opportunity for the governments to begin changing the attitudes of the region's population, overwhelmingly unhappy with the performance of their public officials across virtually all critical performance indicators. Accountable and responsible politics, better governance, and stronger rule of law are foundational principles that the citizens and businesses had come to expect from the region's governments.

Employment and education are areas whose importance will grow over the next period. The success in finding **gainful employment is currently viewed by citizens as a result of personal contacts rather than merit**. With expectations of higher unemployment, confidence in the job market needs to be rebuilt in order to rehire employees that have lost jobs during the COVID-19 outbreak, as well as to mobilise the large but dormant contingent of prospective job seekers. Fewer than two-thirds of the region's graduates secured employment within three years of leaving school, while only a quarter were employed in the first 12 months following graduation, a sobering fact that needs addressing through an ever increasing dialogue between employers, governments and educational institutions. Businesses are finding it more difficult to fill vacancies with qualified workers, and almost 80% of managers in the region stresses that digital skills are important for conducting their businesses. Finally, **the need to develop better social infrastructure, such as hospitals, has risen to a number one priority** for government investment in the minds of citizens, even before the COVID-19 outbreak.

The 2020 Balkan Barometer has recorded the highest positive sentiments by both businesses and citizens since we've started off on this endeavour. Thus, the most fitting title for this year's Barometer should perhaps be - the future is not what it used to be. Hopefully, we will build a new, better future in its stead.

# INTRODUCTION

The 2020 edition of the Balkan Barometer represents the next chapter in the steady evolution of the region's foremost survey of public and business opinion. Launched as an attempt to measure impact of regional actions implemented under the South East Europe (SEE) Strategy, the Barometer is now firmly established as a reliable source of regional data widely employed and referenced by media, business, civil society and decision makers alike.

The 2020 Balkan Barometer surveys were conducted between November 2019 and January 2020 in Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, Republic of North Macedonia and Serbia. The Public Barometer survey posed 116 questions to 6,020 citizens and the Business Opinion survey presented 95 questions to 1,215 business owners, managers or executives. Answers by survey respondents have been systemised, analysed and presented in the two reports – Public Opinion Survey and Business Opinion Survey.

This edition of the Barometer has seen some changes in terms of questions and topics covered in an attempt to remain up-to-date and relevant in a rapidly changing regional landscape. The regular emergence of social and economic challenges and topics, whether global or local, has seldom been unaccompanied by regional ripples and the Barometer has always recorded their effects on the SEE community. In particular, the Barometer remains a valuable guide to frequently shifting attitudes towards cooperation and integration, both at regional and EU levels, helping inform the work of policy makers and other interested regional stakeholders.

While originally introduced to help track progress in meeting the SEE 2020 Strategy, Barometer has outgrown its role, and with the SEE 2020 Strategy coming to a full stopthis year, the Balkan Barometer is expected to serve a much broader range of purposes in the future. One of those roles would be to support crafting a post-2020 agenda that will be more in tune with the SEE community's immediate needs and interests based on six years' worth of data and a clear need to act quickly to stem the negative effects of COVID-19 outbreak.

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



# KEY FINDINGS

Incremental **improvement in regional sentiment persists** with another modest increase in respondent ratings. As has become customary, heightened expectations for the future are once more reflected in an above average level of optimism. Meanwhile, the assessment of the respondents' current situation is significantly gloomier in comparison, although slightly higher than last year.

Overall, **satisfaction with life in the region is growing**, driven chiefly by expectations for the future but also by a more positive appraisal of the respondents' present situation. After a dramatic drop in public sentiment recorded in 2018, Republic of North Macedonia is rebounding strongly, and in line with expectations, following protracted political upheaval.

The number of **respondents unhappy with the way things are going in their economy continues to outnumber those who describe themselves satisfied**; at present, just over a half are either mostly or completely dissatisfied with developments in their economy. While far from ideal, however, these numbers do reflect a gradual improvement in the mood of the region with the ranks of the satisfied growing with each new instalment of the Barometer.

For the first time since the Barometer's inception in 2014, the **respondents unhappy with their financial situation no longer outnumber their more prosperous counterparts** with the two groups now neck and neck at 34% each. For illustration purposes, as recently as 2018, the two groups made up 29% and 42% of the population, in favour of the negative contingent. Significantly, **all economies in the region have recorded an increase in satisfied respondents**, a strong indication that the effects of growth taking place over the past several years are beginning to translate into individual gains for the residents of the Western Balkans region.

An **overwhelming majority of respondents continue to identify as average** with an encouraging decline in the number of the "below-average" survey participants. Significantly, Serbia reports a major improvement in the socio-economic status of its citizens with a ten-point surge in the number of average households and a near-identical drop in the number of below-average survey respondents (-11), a clear indicator of upward mobility.

**Unemployment and level of economic development** continue to be the two key problems facing the region, albeit to a significantly lesser degree than in previous years. Corruption is once more ranked third but its prevalence in the region is growing, with brain drain featuring much more prominently than in previous years.

In the wake of an alarming drop in 2018 survey, **employment numbers across the region have rebounded strongly** with a cumulative seven-point hike over a period of just 12 months. All of the region's economies, with the exception of Montenegro, have added significant numbers to their employment ranks; Albania, in particular, has seen a remarkable 18-point increase in overall employment since the last survey (up to 53% from 33% in 2018) with Serbia in second with 11-points. The figures represent a dramatic and welcome departure from last year's Barometer when only two economies reported limited growth in employment.

There is **growing awareness of the risks posed by climate change** with an overwhelming majority describing it as a serious threat, likely a direct consequence of another record-breaking year for air pollution for much of the region.

There is a notable **surge in the perceptions of corruption** across the institutional landscape in the region; the vast majority of sectors, organisations and institutions reviewed are considered corrupt by an overwhelming majority of respondents.

Although there has been a **slight uptick in performance ratings of the region's governments in terms of speed and effectiveness of service delivery**, whatever good news here is greatly overshadowed by the plummeting confidence of the region's population in the rule of law system. An **overwhelming majority** of the region's residents feel that **laws are not applied effectively or impartially**. The figures from Bosnia and Herzegovina make for particularly grim reading with the economy especially disillusioned with the work of its judicial and law enforcement institutions and agencies.

As in previous years, **success in the public sector continues to be linked primarily to personal connections** over hard work, an opinion that holds across each of the six individual economies.

There is **growing awareness of the potential of digitalisation** by an increasing number of the region's residents. While still relatively modest, the number of respondents pursuing training in information and communications technologies has grown steadily if not spectacularly.

The importance of **who you know rather than what you know** is once again the big takeaway from this year's employability survey. Clearly, there is much more to be done by the region's governments in order to ensure that employment is chiefly governed by merit instead of personal contacts.

What is worrisome is that, **less than two-thirds of the region's graduates secured employment within three years of leaving school** while only a quarter were employed in the first 12 months following graduation.

**Public sector employers are still the more attractive proposition but to a much lesser extent** with the ranks of indiscriminate job seekers growing substantially. Meanwhile, **more than a quarter of all respondents in the region feel underprepared and underserved by the education systems** in their economies. **Foreign languages and digital skills** are once more the two topical areas where most employers expect to see their workers improve.

**Regional cooperation continues to grow in prominence** with an overwhelming majority of respondents supportive of its role in improving the political, economic and security situation in their home economies. Furthermore, and after several years of stagnation, there is a marked increase in interest in regional affairs by the surveyed population, indicating untapped potential for greater engagement within the region. With 2020 no longer a viable accession target for SEE economies, however, **there is a marked revival of pessimism with regards to the region's EU integration prospects**. At the same time, **support for EU membership is growing across much of the region** with 59% endorsing accession (a cumulative ten-point increase on 2017).

**Hope is the prevailing sentiment in the region**, albeit not by a significant margin. An **underlying sentiment of solidarity** pervades the Western Balkans with close to two-thirds of all respondents focusing on what brings the region together rather than drives it apart. This is hugely significant as it indicates a sense of shared identity, at least as far as a considerable majority of the region's residents is concerned.

There has been **almost no change in perceptions of security** at regional level since the 2018 edition of Barometer; respondents unhappy with the security situation in their economy continue to greatly outnumber their happier counterparts, 46% to 24%. Bosnia and Herzegovina stands out as particularly unhappy with two-thirds unhappy with the level of security in their economy.

This year sees a **significant reordering in investment priorities by the region**; a long-term leader in the rankings, industrial development, has been relegated to second place by social infrastructure, highlighting widely held concerns over the quality of critical public service providers, such as schools and hospitals. This trend is likely to increase following the COVID-19 pandemic and its impact on the public health and social security systems.

Following a period of relative stability, the Barometer records **another surge in interest when it comes to emigration from the region**. Concerning, the number of respondents willing to consider relocation has grown across all of the six economies indicating a broad regional trend.

Much of the rhetoric surrounding **migrants, as well as asylum seekers**, remains **focused on their financial and security implications** for the economies affected, with humanitarian concerns largely secondary. In this environment, it is unsurprising that a large majority in the region feels threatened by the migrants' continued, and growing, presence.

**Violent extremism remains closely tied to economic stagnation and unemployment** as underlying drivers of radicalisation, with governments asked to do more to tackle nepotistic labour markets and boost employment prospects, especially for those age groups particularly vulnerable to radicalisation and most likely to presently be unemployed (18-29). Online radicalisation, meanwhile, is a very real prospect for a large segment of the region's population.

Encouragingly, a **growing number of respondents support strengthening commercial ties within the Western Balkans region**. Unsurprisingly, preferred trade partner for the region's economies is the European Union, with Russia and Turkey in joint second.

**Consumer confidence in domestic products remains high** and is growing, both when compared to competitors from the region as well as from the EU. In an encouraging development for the region's industry, respondents tend to overwhelmingly and increasingly favour domestically sourced food and beverages with products from the region second choice, ahead of products from the European Union. This highlights a longer-term trend that is likely to intensify over the coming months and years, as the globalisation becomes more fractured and replaced by regionalisation.

With transport infrastructure **very much a long-term investment priority** for the Western Balkans, there are few surprises compared to the previous editions of the Barometer. The bias towards road transport and automobiles in particular, continues to grow, alongside overall satisfaction with quality of infrastructure, at least for much of the region.

The two leading obstacles to employment cited in 2018 continue to top the rankings, albeit in reverse order; **not knowing the right people is now top, while a shortage of adequate jobs is now second** with roughly a third of respondents citing this a chief obstacle to gainful employment. The perceived levels of nepotism in hiring are a major cause for concern and indicate that trust in employers, whether private or public, is at a low and must be addressed in a structural manner by the region's economies.

# REGIONAL OVERVIEW

The release of the 6th edition of the Balkan Barometer could hardly come at a more uncertain time for the Western Balkans, and indeed the world. The coronavirus (COVID-19) outbreak has already led to a major health crisis across the region and immense disruptions of the global and regional economies. The situation is likely to become even more complex in the coming months, and the economic fallout from the pandemic could represent one of the biggest shocks of recent decades.

**The loss of output resulting from COVID-19 health crisis and the related measures to contain the spread is unprecedented**. The uncertainty relating to duration of the crisis and the unorthodox position of the governments, where instead of stimulating the aggregate demand, the governments are forced to contain the economic activity so as to slow the spread of the virus, makes the crisis response extremely difficult. This economic trajectory will almost certainly pull all of the economies in the region into a recession, and a much more pronounced one than experienced during the Great Recession of 2008/2009.

**According to the latest forecasts (IMF WEO, April 2020), Western Balkans economies are expected to contract on average by -4% during 2020**, with the negative growth in individual economies expected to range between –9% in Montenegro and -3% in Serbia. The regional economies are being affected through several channels, including the lower tourism and transport revenues, cuts in manufacturing outputs, lower remittances, decelerating exports growth and lower FDI and investment overall. The mobility restrictions in the Western Balkans economies are putting enormous pressure on the businesses, particularly in the MSME segment, which makes up more than 90% of the region's economies, cutting the firms off from buyers, suppliers, and, in some cases, employees.

**To save lives, but also livelihoods, and preserve gains made over the past years, a rapid and decisive government response is needed**. The governments in the region are already putting forward fiscal and other measures to alleviate shocks, particularly in hardest hit economic sectors and households. The immediate measures will help maintain economic relationships throughout the shutdown and are essential to enable activity to gradually normalise once the pandemic abates and containment measures are lifted.

**However, economic stimulus will need scaling up in the following months and most Western Balkans economies will likely require external support**. Albania, Bosnia and Herzegovina, Kosovo* and the Republic of North Macedonia have already received IMF financial assistance under the Rapid Financing Instrument in the amount of €732.13 million. The EU is also mobilising a package of over €410 million in reallocated bilateral financial assistance to support the Western Balkans during the coronavirus emergency.

**During 2019 the region made some important gains. The unemployment rates were at their lowest in decades and some of the unemployment concerns were finally starting to abate**, as recorded by this iteration of Barometer as well. In 2019 the average regional unemployment rate reached 13.4% and more than 160,000 people found employment.

**Foreign direct investment (FDI) inflows were maintained at a similar level to 2018.** According to estimates, FDI inflows reached close to EUR 6.5 billion during the year, a new regional high, with Serbia reaping most of the windfall. The FDI inflows displayed a similar structure to the previous year, with a larger share of inflows going into tradable sectors, such as manufacturing (particularly metal processing and motor vehicles), as well as real estate. A slightly more diversified structure of FDI originating countries is emerging in the past several years, with some less traditional partners growing in prominence, particularly China (including Hong Kong), Russia and the Gulf states.

**The region's trade with the rest of the world has also grown in the past year, although at a slower rate** than in the past several years. Trade expanded by 5.8% in 2019, reaching EUR 88.6 billion, or roughly 87% of the region's GDP. Imports have grown slightly faster (6.3%) than exports (5.1%), reflecting a combination of subdued demand in the key export markets, observable during 2018 as well, and increased domestic consumption which was again the main driver of GDP growth in 2019.

**The political and socio-economic developments in the region were marked by substantial volatility and uncertainty during 2019. Albania** was struck with a devastating earthquake that took a large toll in human life and destroyed thousands of homes and infrastructure. A total of 51 people were killed in the earthquake, more than 3,000 were injured, with damages estimated to exceed EUR 1 billion. In a welcome show of solidarity, all of the economies in the region have reacted swiftly to support Albania, sending aid, search and rescue teams, and support in material, equipment and supplies. **Bosnia and Herzegovina** has succeeded in forming the Council of Ministers in December 2019, 14 months following the elections, but the political situation throughout the period has been one marked by increased

**Figure 1: Real GDP Growth in the Western Balkans 2008-2021**
(Source: WB Central Banks (2008-2019), IMF World Economic Outlook 2020 (2020-21), WB GDP weighted average growth rate)

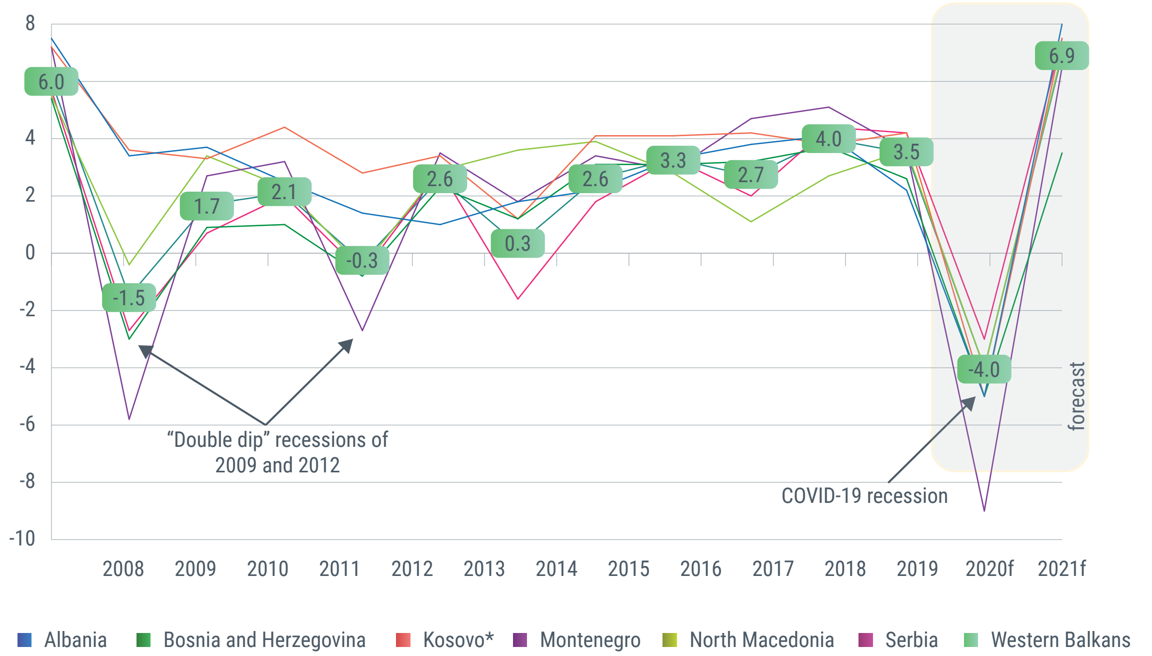
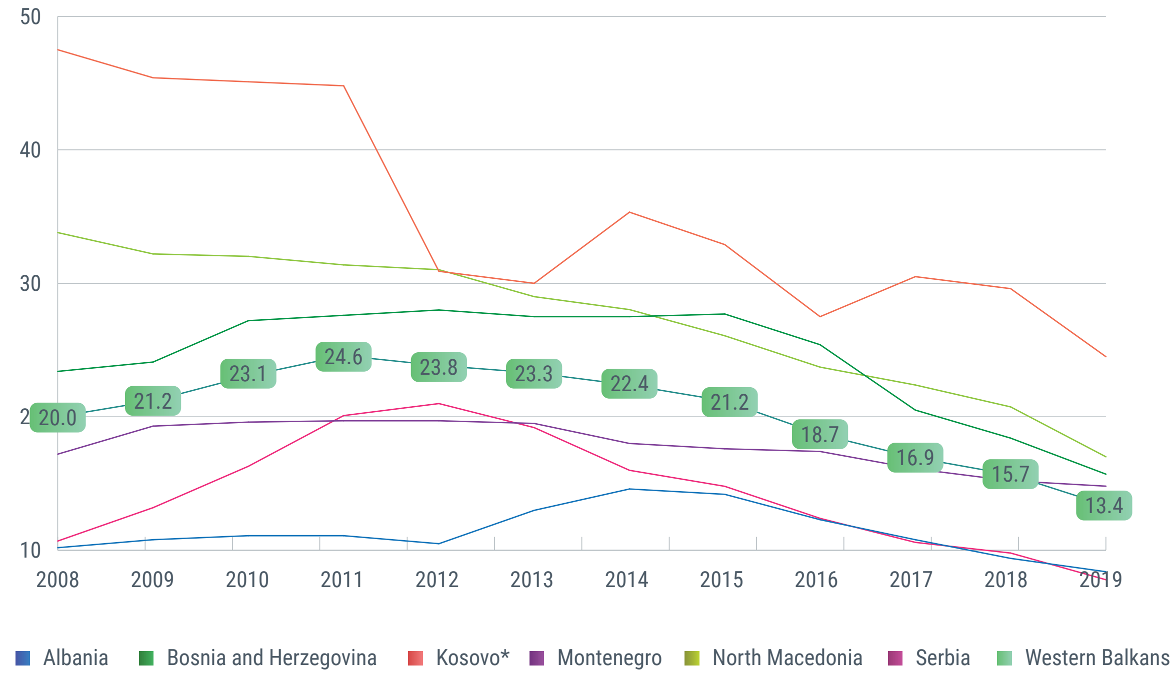



**Figure 2: Unemployment rates in the Western Balkans, 2009 - 2019**
% of labour force, 2009-2019; LFS



polarisation and political antagonism. After a protracted period of political negotiations that followed the October 2019 snap elections, **Kosovo*** has also managed to form a government, albeit a short lived one, and Kosovo* is again facing difficult political negotiations. **Montenegro** has seen considerable upheaval surrounding the adoption of its Law on Religious Freedom, with mass protests and increased societal polarisation, which also reflected on some bilateral relations within the region. The situation in the **Republic of North Macedonia** has for the most part seen remained stable during the year, interrupted only by the presidential elections held during the year. In **Serbia**, the citizens have been taking to the streets in anti- government protests against the alleged monopolistic position of the party in power and perceived lack of transparency, corruption and freedom of media.

**Important developments have also occurred in the sphere of regional cooperation.** During 2019, another high-level initiative, dubbed "Mini Schengen", was launched by the leaders of Albania, Republic of North Macedonia and Serbia. With its intended purpose of lifting barriers on the free movement of goods, people, services and capital among the Western Balkan economies, the initiative was met with mixed reception by other WB6 economies, and it remains to be seen whether the initiative will receive the political support by others and be coupled with a clear operational framework.

**The Regional Roaming Agreement entered into force in July 2019, substantially bringing down mobile network charges in Western Balkans.** By July 2021, the Agreement's implementation foresees removal of all tariffs and is the first step towards introducing roam like at home principle – EU principle that practically removes all roaming charges between the member states. Moreover, that promise continues to hold, as roaming prices decreased again on 1st January 2020.

**In a welcome development, Kosovo* abolished import taxes on goods from Bosnia and Herzegovina and Serbia,** imposed during 2018, following the breakdown of Belgrade-Pristina dialogue. While the dialogue has not re-started in the meantime, the decision by the Kosovo* government to remove import taxes will hopefully pave the way for closer and more fruitful engagement during 2020.

**The Western Balkans EU integration process has also seen important developments during the year.** After the initial disappointment in Albania and the Republic of North Macedonia on the EU's decision to postpone opening of negotiations during 2019, the European Council finally decided to open negotiations with the two economies in March 2020, and the process is expected to start following the approval of the EU's negotiating framework. The negotiating framework will need to take into account the recently released policy paper by the European Commission on 'Enhancing the accession process - A credible EU perspective for the Western Balkans', which should also be reflected in the existing negotiations with Montenegro and Serbia that have opened 32 and 18 negotiation chapters, respectively. Bosnia and Herzegovina and Kosovo* have made very limited progress during the year in attaining the candidate status.

**The region's outlook will be largely dependent on the outcome of COVID-19.** The ongoing crisis will test the resilience of the economies of the region and the abilities of governments to respond quickly and effectively to the situation protect the health of population and mitigate the economic consequences. Keeping the economy functioning to the extent possible throughout pandemic and after it ceases should be one of the governments' primary concerns. Thus, other immediate concerns and pending structural reforms may fall into the background.





# BALKAN PUBLIC SENTIMENT INDEX

The Balkan Public Sentiment Index (BPSI), originally designed to monitor changes in present sentiment and outlook over time, was calculated for this cycle of the Balkan Barometer as well. As in the previous instalments of the Balkan Barometer, the BPSI is composed of the following five questions:

1. How satisfied are you with the way things are going in your society? (answers: 5-point scale)
2. How satisfied are you with the financial situation of your household? (answers: 5-point scale)
3. How satisfied are you with the economic situation of your society? (answers: 5-point scale)
4. What are your expectations for the next year? Do you think that in 12 months your financial situation will be better, worse, or the same?
5. What are your expectations for the national economy? Do you think that in 12 months' time the state of the economy will be better, worse, or the same?

BPSI represents a measure of the current state of affairs and expectations for the future regarding the general and economic situation in society, as well as the situation of individual households taking part in the survey. It is a measure that helps to monitor changes over time at the SEE level, as well as at the individual economies' level.

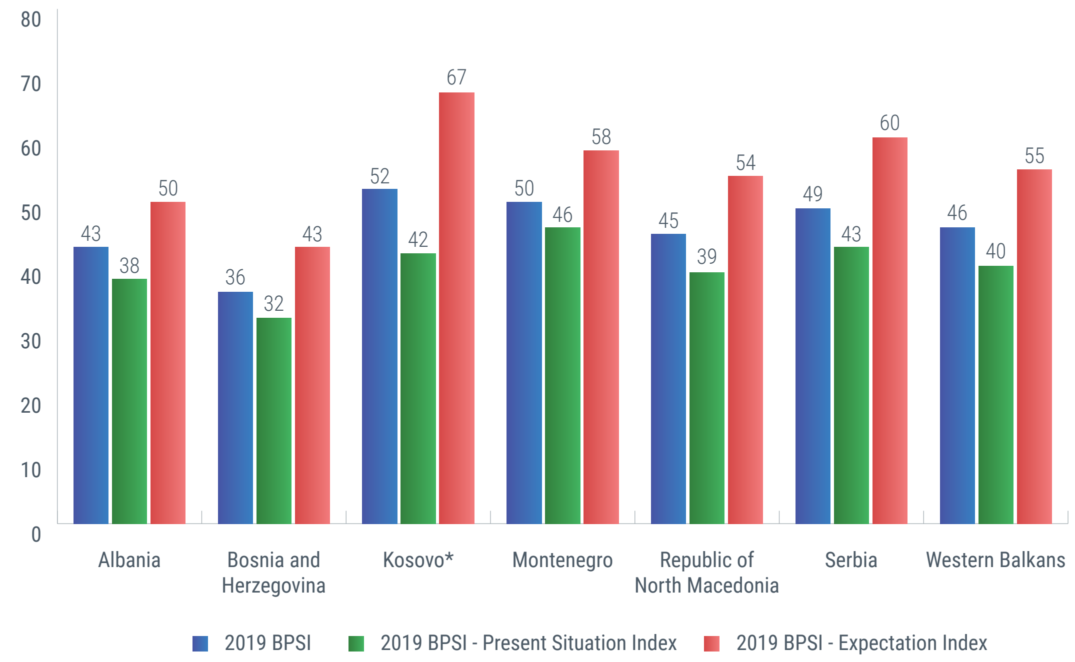
The index is constructed with a five-point scale answers for Q1 to Q3 scored as follows: I'm completely dissatisfied - 0 points, I'm mostly unsatisfied – 25 points, neither satisfied nor dissatisfied – 50 points; I'm mostly satisfied – 75 points, I'm completely satisfied – 100 points. Answers for Q4 and Q5 are scored as follows: better – 100 points, worse – 0 points, the same – 50 points.

After responses are recoded, the average value is calculated for the entire SEE region, as well as for each economy separately. The index values are expressed on a scale from 0 to 100.

BPSI is further divided along two sub-indexes, BPSI – Present Situation Index and BPSI – Expectation Index, with the aim to separately monitor the present sentiment among the population, as well as their expectations for the future.

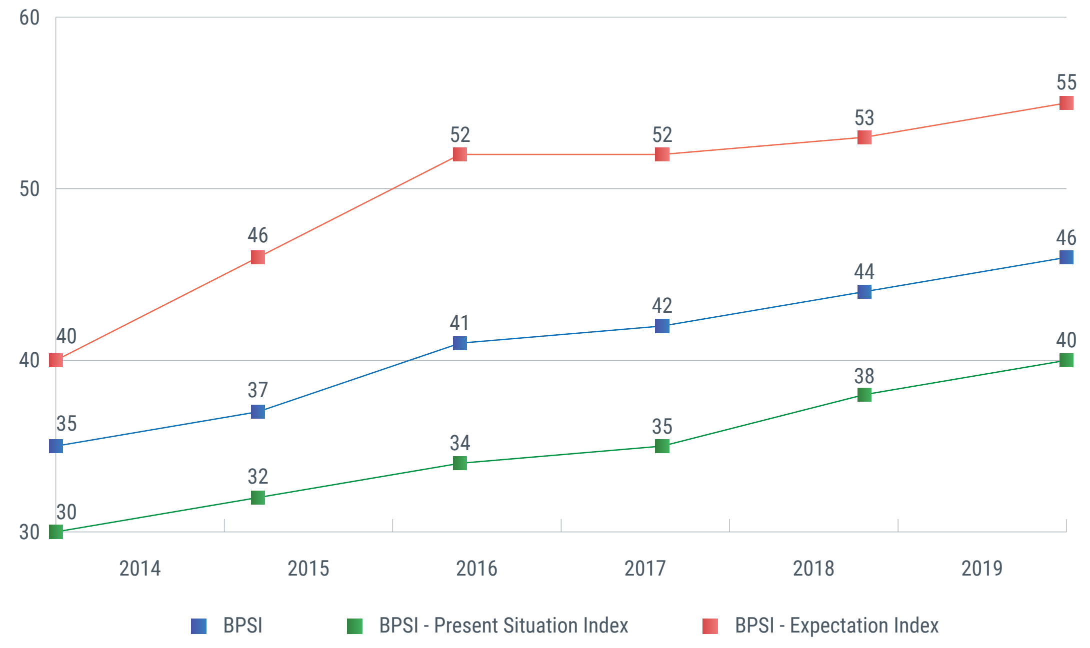
What follows are BPSI results for the present year, and comparison with the results for the previous cycles, both for the SEE region as a whole and for each economy separately.

**Figure 3: Balkan Public Sentiment Index**
(Scores are on a scale of 0 to 100)

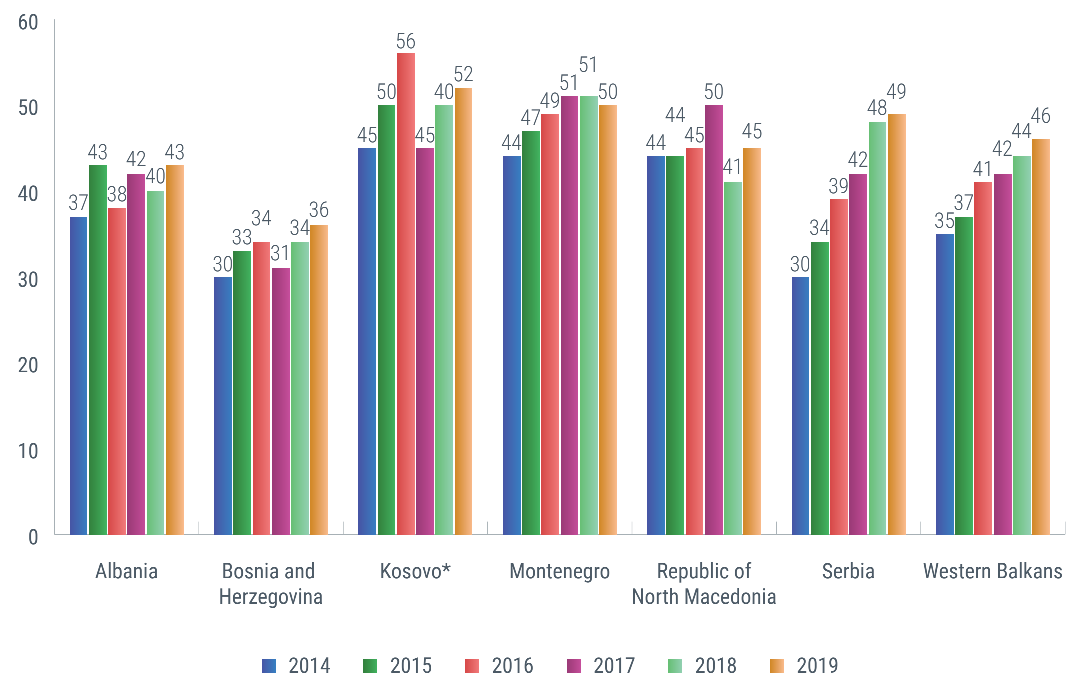


Incremental improvement in the regional BPSI value continues with another modest increase in respondent ratings (46 compared to 44 in 2018). As has become customary, heightened expectations for the future are once more reflected in an above average level of optimism (55 and up from 53 in 2018). Meanwhile, the assessment of the respondents' current situation is significantly gloomier in comparison, although slightly higher than last year (40 from 38 in 2018).

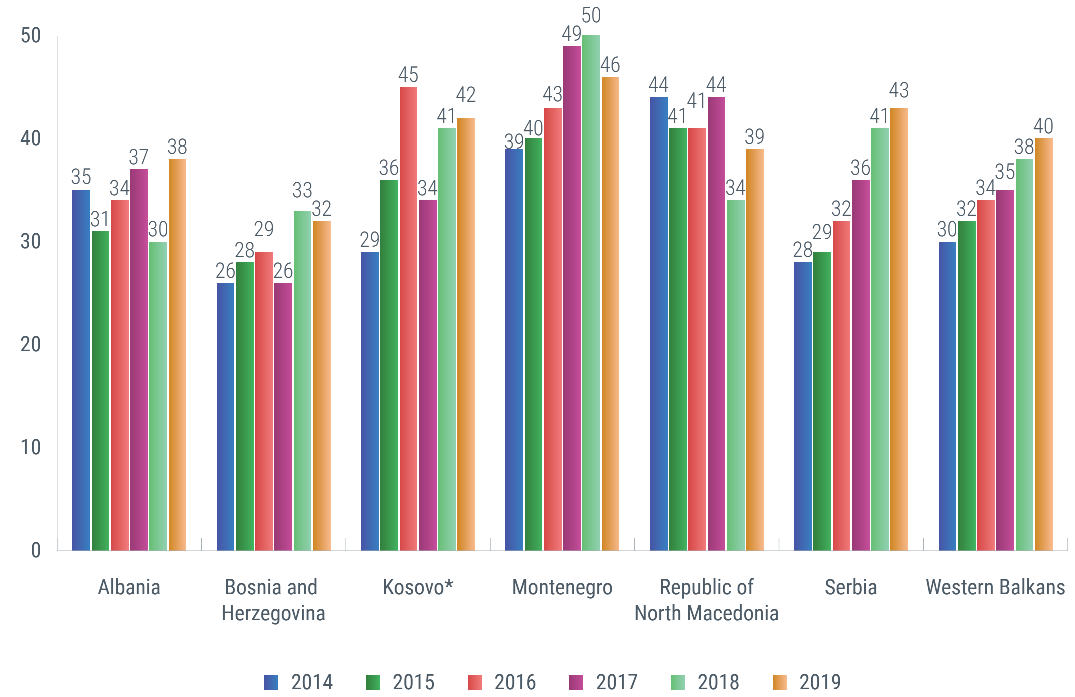
**Figure 4: Balkan Public Sentiment Index – comparison 2014-2019**
(Scores on a scale of 0 to 100)



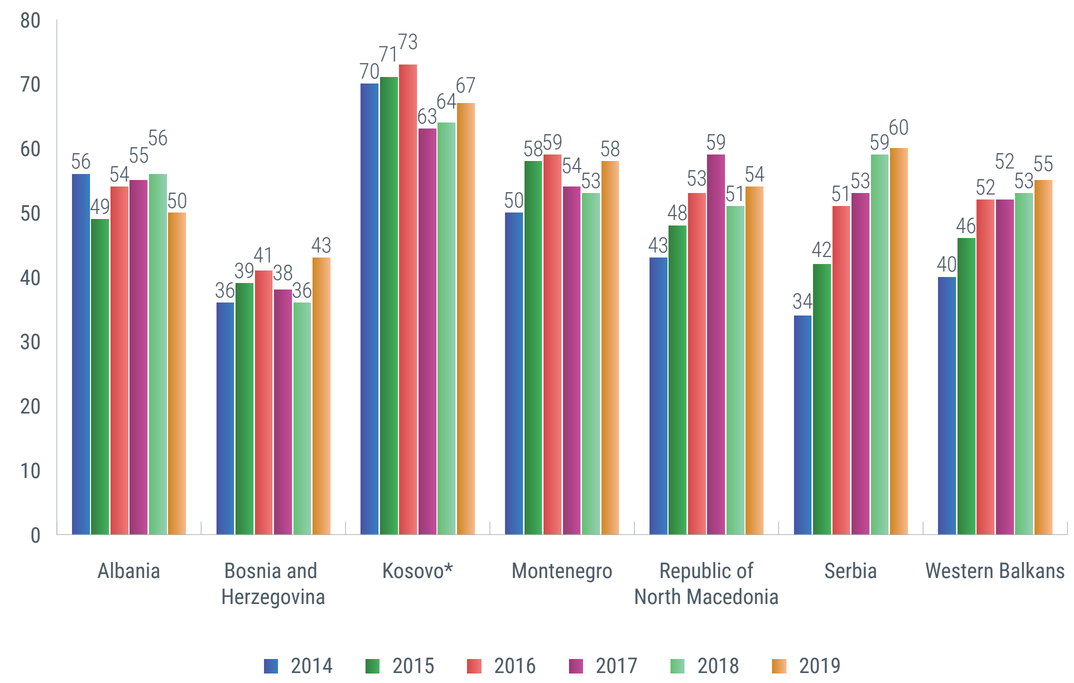

**BPSI**




**Present Situation Index**




**Expectation Index**




As evidenced by the results of a comparative review of all six instalments of the Barometer, satisfaction with life in the region continues to grow at a steady, if unspectacular, rate. Nonetheless, while year-by-year increases remain modest, overall satisfaction with life in the region seems to have grown by an impressive 11 points since 2014 (from 35 to 46). A closer look at results by economy across the six-year period, however, suggests that Serbia can take much of the credit for the region's performance, recording a remarkable 19-point hike in respondent satisfaction across that period. As noted, much of this improvement can be attributed to a strong economic performance with best-in-region employment growth and greater investment by both public and private sectors. During the same time, no other economy in the Western Balkans has seen a double-digit upturn in public sentiment.

In terms of year-on-year results by economy, this survey records the most sizable hike in overall satisfaction with respondents from the Republic of North Macedonia (+4), as forecasted by the previous edition of the Barometer. This surge comes on the heels of a historic nine-point drop in public opinion in 2018, brought on by political upheaval and largely resolved since, as indicated by improving numbers.

Montenegro, meanwhile, is the only economy that has seen a drop in overall respondent satisfaction, albeit at a minimal rate (-1). The other four economies in the region have all seen a one or two-point bounce in citizen satisfaction since 2018.

In terms of their appraisal of the current situation in their economies, respondents from Albania have shown the greatest level of improvement in the region with an eight-point increase on last year (38), after recording their lowest ever score in 2018 (30). At the same time, Montenegro has seen a four-point decrease in the number of respondents satisfied with their present circumstances (down to 46 from 50). Outside of Montenegro, Bosnia and Herzegovina is the only economy in the region to have recorded a decrease in the number of positive respondents since last year (down to 32 from 33 in 2018).

There is growing positivity for the future in Bosnia and Herzegovina with the economy recording the region's largest year-on-year increase in the number of optimistic respondents (+7). While still the region's leading pessimist, this year's results represent a departure from the economy's overwhelmingly gloomy predictions for the future.

Kosovo*, meanwhile, remains the region's most enthusiastic economy and after two years of regression, the numbers of optimistic respondents are once more growing (up to 67 from 64 in 2018).

Overall, satisfaction with life in the region is growing, driven chiefly by expectations for the future but also by a more positive appraisal of the respondents' present situation.



# LIFE SATISFACTION AND ASSESSMENT OF GENERAL TRENDS

Hope is the prevailing sentiment in the region, albeit not by a significant margin. An underlying sentiment of solidarity pervades the Western Balkans with close to two-thirds of all respondents focusing on what brings the region together rather than drives it apart. This is hugely significant as it indicates a sense of shared destiny, at least as far as a considerable majority of the region's residents is concerned.

The number of respondents unhappy with the way things are going in their economy continues to outnumber those who describe themselves satisfied; at present, just over a half are either mostly or completely dissatisfied with developments in their economy. While far from ideal, however, these numbers do reflect a gradual improvement in the mood of the region with the ranks of the satisfied growing with each new instalment of the Barometer.

For the first time since the Barometer's inception in 2014, the respondents unhappy with their financial situation no longer outnumber their more prosperous counterparts with the two groups now neck and neck at 34% each. For illustration purposes, as recently as 2018, the two groups made up 29% and 42% of the population, in favour of the negative contingent. Significantly, all economies in the region have recorded an increase in satisfied respondents, a strong indication that the effects of growth taking place over the past several years are beginning to translate into individual gains for the residents of the Western Balkans region.

As has become customary , respondents tend to overwhelmingly view their own situation in more positive terms than that of their economy; while only roughly a fifth (21%) see their economy doing well, more than a third (34%) describe their situation as positive. The discrepancy likely results from a long-standing tendency in the region to view developments at economy level as overwhelmingly detrimental to prosperity, versus what is objectively perceived by the respondents at household level.

There has been almost no change in perceptions of security at regional level since the 2018 edition of Barometer; respondents unhappy with the security situation in their economy continue to greatly outnumber their more satisfied counterparts, 46% to 24%. Bosnia and Herzegovina stands out as particularly dissatisfied with two-thirds unhappy with the level of security in their economy.

Unemployment and economic development continue to be the two key problems facing the region, albeit to a significantly lesser degree than in previous years. Corruption is once more ranked third but its prevalence in the region is growing, with brain drain also featuring much more prominently than in previous years.

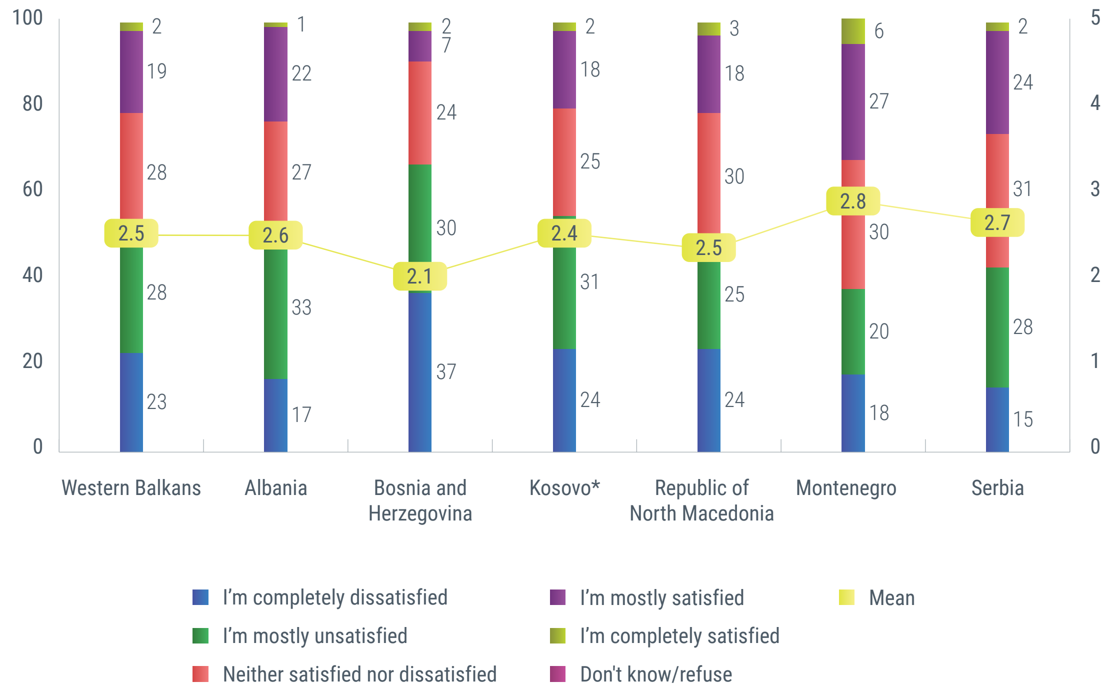
This year sees a significant reordering in investment priorities by the region; a long-term leader in the rankings, industrial development, has been relegated to second place by social infrastructure, highlighting widely held concerns over the quality of critical public service providers, such as schools and hospitals. Agricultural development is in third place with 17% while investments in small and medium enterprises are supported by 13% of the respondent population.

Overall, and in keeping with last year's survey results, investments in the private sector are losing support by the respondent community, with backing for industrial development and small and medium enterprise sector down by four points each since 2018 and six since 2017.

Tourism support recorded a five-point hike since 2018 to 8% in 2019, while the level of support for science and technology investment has declined further and presently stands at 5%, down from 7% in 2018.

Close to two-thirds of all respondents say that they are not currently active in the financial markets, whether by taking out a loan, owning stock or having an insurance policy (64%). Fewer than a quarter have loans or mortgages out with a commercial bank (23%), 6% are paying off a micro-loan and 5% have taken out an insurance policy. 2% each own shares, bonds or other securities, and have used a leasing product in the past year.

**Figure 5: How satisfied are you with the way things are going in your economy?**[1]
(All respondents – N=6020, scale from 1 to 5, share of total, %)




The number of respondents unhappy with the way things are going in their economy continues to greatly outnumber those who describe themselves satisfied. At present, some 51% are either mostly or completely dissatisfied with developments in their economy, while 21% feel the opposite; more than a quarter (28%), meanwhile, are neutral.

While far from ideal, these numbers do reflect a gradual improvement in the mood of the region; as recently as 2017, only 14% described themselves pleased with developments while 56% were unhappy.

At economy level, Bosnia and Herzegovina is home to the highest concentration of dissatisfied respondents with 67%, Montenegro, meanwhile, occupies the other end of the scale with just over a third of the population (38%) unhappy with the direction of their economy. The number of unhappy respondents in Montenegro, however, has grown by seven points since 2018.

After a significant surge in the number of unhappy respondents in 2018 (+15 and up to 69%), respondent satisfaction has rebounded strongly in Albania where 49% are now satisfied with the developments in their economy, up from 28% in the previous year.

Likewise, Serbia and the Republic of North Macedonia have recorded significant, if not similarly remarkable, improvements with the proportion of negative respondents now dropping by 12 and 11 points, respectively.

For the first time since the Barometer's inception in 2014, the respondents unhappy with their financial situation no longer outnumber their more prosperous counterparts with the two groups now neck and neck at 34% each. For illustration purposes, as recently as 2018, the two groups made up 29% and 42% of the population, in favour of the negative contingent.

Respondents tend to overwhelmingly view their own situation in more positive terms than that of their economy; while only roughly a fifth (21%) see their economy doing well, more than a third (34%) describe their situation as positive. The discrepancy likely results from a long-standing tendency in the region to view developments at economy level as overwhelmingly detrimental to prosperity, versus what is objectively perceived by the respondents at household level.

All economies in the region have recorded an increase in satisfied respondents, a strong indication that the effects of growth taking place over the past several years are beginning to translate into individual gains for the residents of the Western Balkans region. Albania is still the regional leader in the percentage of unhappy respondents with 42% of the population, while lessless than a quarter are unhappy in Kosovo* (23%), making them the region's most financially satisfied economy.

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





**Figure 6: How satisfied are you with the financial situation of your household?**[2]
(All respondents – N=6020, scale from 1 to 5, share of total, %)

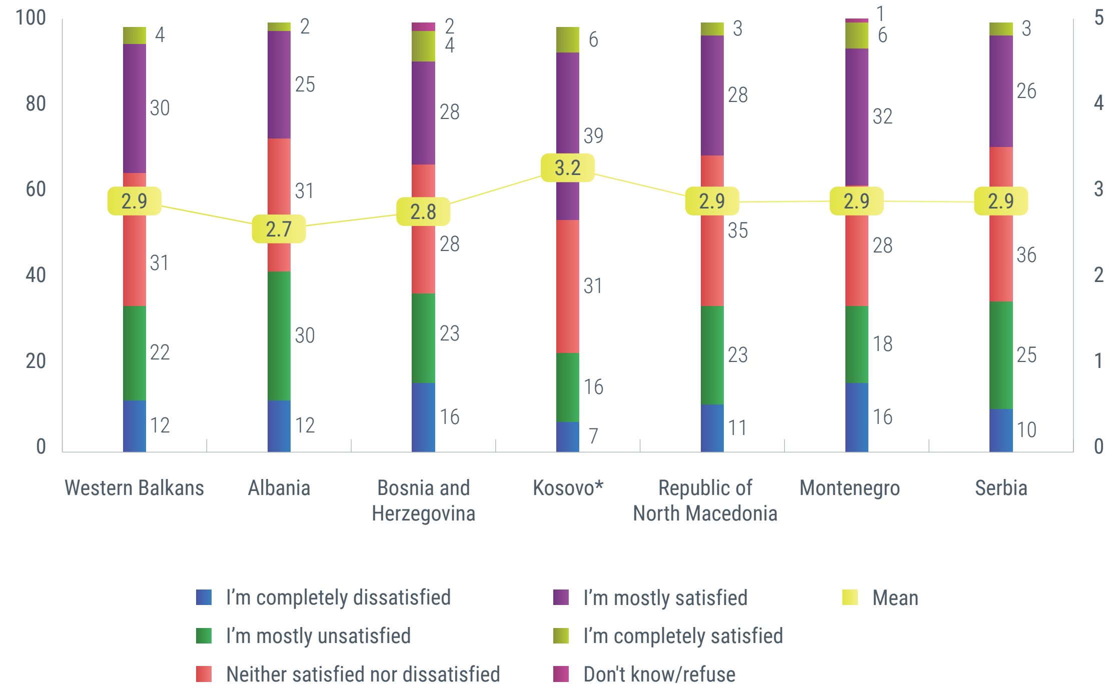
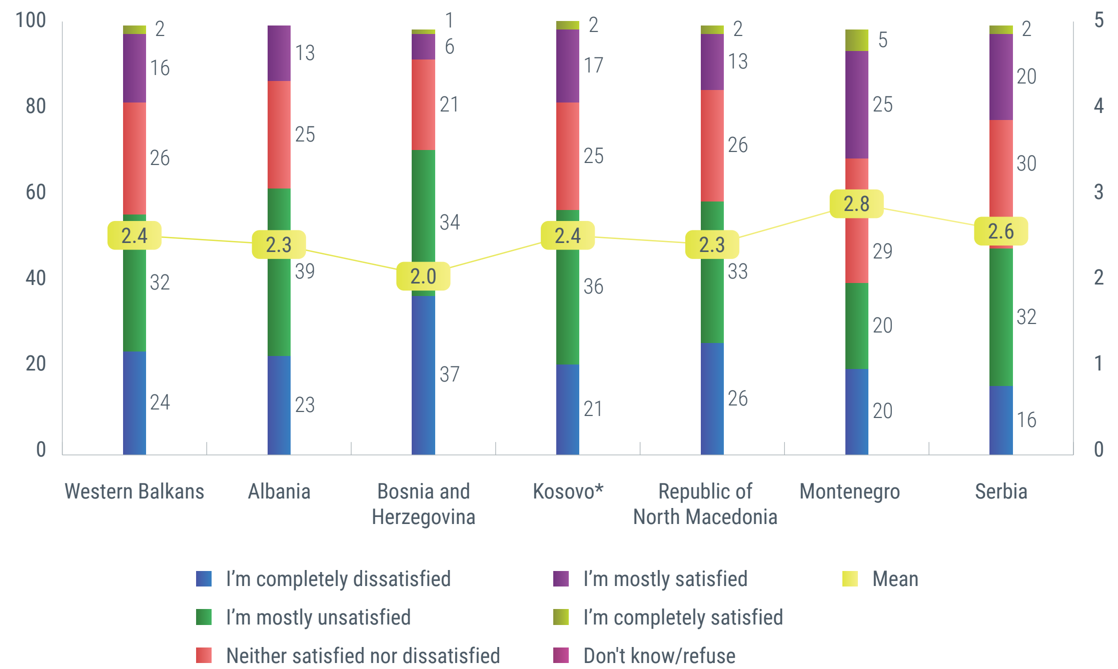



**Figure 7: How satisfied are you with the economic situation in your economy?**[3]
(All respondents – N=6020, scale from 1 to 5, share of total, %)




Satisfaction with the economy continues to grow steadily although an overwhelming majority are still unhappy (56%). The number of satisfied respondents has once more increased, from 15% in 2018 to 18%. Overall, since 2016, the numbers of satisfied respondents have grown by eight points, a reliable

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

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

indicator of the region's improved economic health. This finding is also confirmed in the Business Barometer, where 30% of executives reported the economic situation improved over the past year – a 7-point increase over the previous year. The number of neutral respondents has dropped by four points in the course of past year.

Once more, Bosnia and Herzegovina stands out with its residents' stark assessment of the current economic situation with 71% presently dissatisfied. This represents an increase in the number of unhappy respondents with Bosnia and Herzegovina being the only regional economy, along with Kosovo*, to record a surge in numbers across this category since 2018.

Meanwhile, Albania has recorded the most significant drop in the number of negative respondents (-11) since 2018.

**Figure 8: What are your expectations for the next year? Do you think that in 12 months your financial situation will be better, worse or the same?[4]**

(All respondents – N=6020, %)

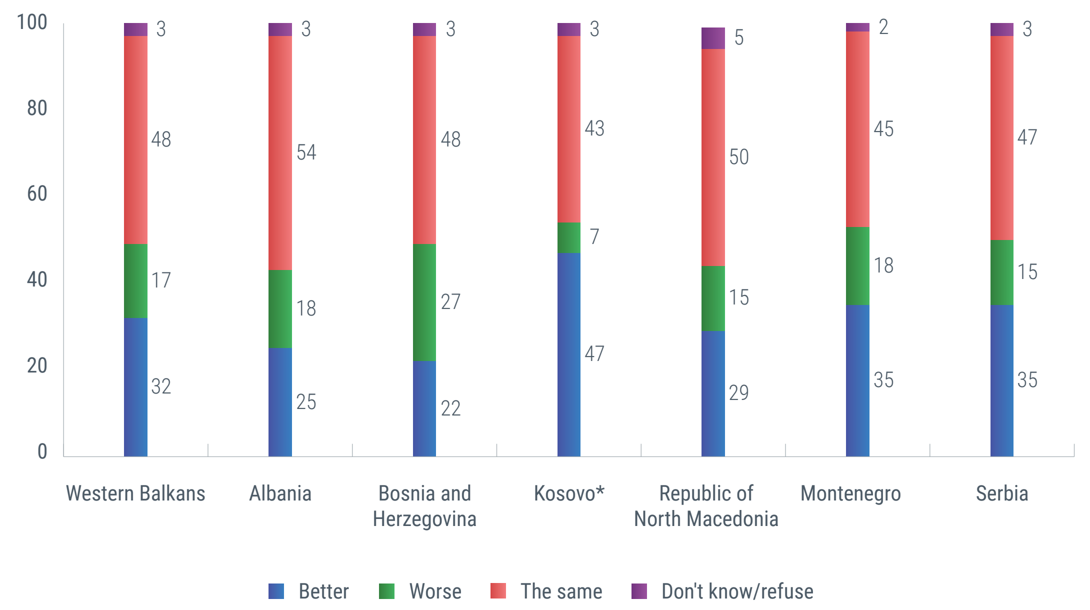
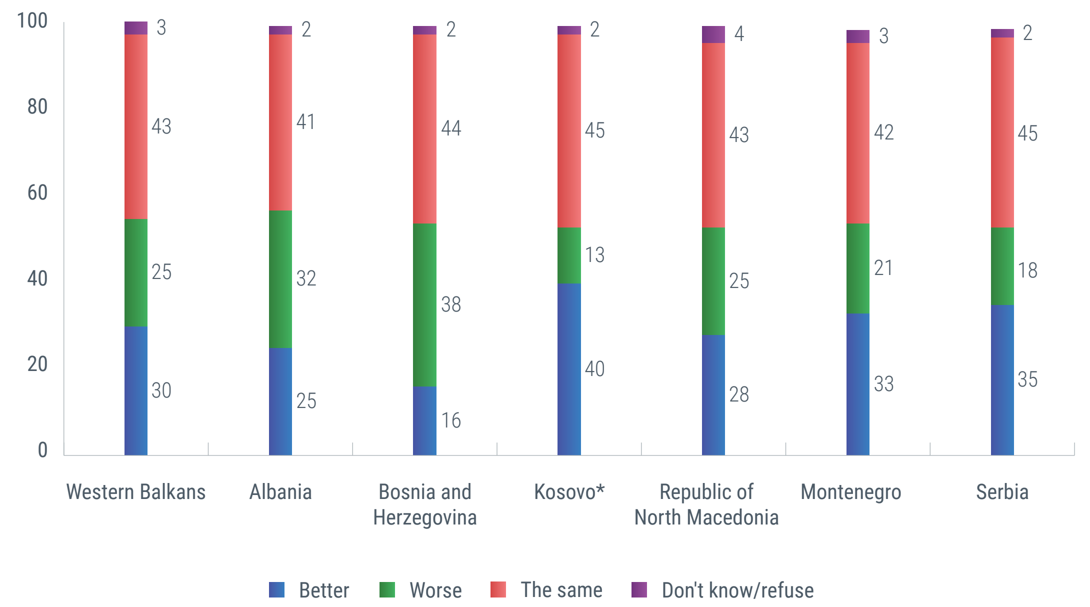



**Figure 9: What are your expectations for the national economy? Do you think that in 12 months the state of the economy will be better, worse or the same?[5]**

(All respondents - N=6020, share of total, %)




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

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





Alongside improvements in the economic status of both individual households and of the region's economies, there is slight but growing optimism for the future. Close to a third (32%, +2 compared to 2018) of all survey participants expect to see their economic situation improve against some 17% who expect to see it deteriorate (-4). Meanwhile, an overwhelming majority anticipate no change in their economic status (48%, up from 46%). Significantly, the Barometer records a cumulative five-point drop in the number of pessimistic respondents over the past two years.

More than a quarter of the respondent population in Bosnia and Herzegovina (27%) expect their finances to worsen, although to a much lesser extent than in 2018 (38%). At the same time, only 7% of respondents in Kosovo* expect to see a deterioration in their finances while 47% believe they will improve.

Albania is the region's most stable economy with 54% of respondents not expecting any changes in their financial prospects (up from 46% in 2018).

While some 43% (same as in 2018) expect to see no change in fortunes of their national economies, there is growing optimism for the future at economy level as well: close to a third (30%, from 28% in 2018) feel their economy will grow in the coming year while a quarter believe it will regress (from 26% in 2018).

Kosovo* is once again the region's leading optimist with 40% of respondents expecting to see improvements in the coming year. Meanwhile, Bosnia and Herzegovina and the Republic of North Macedonia are the only two economies where the pessimists outnumber the optimists, especially in the case of the former (16% vs. 38%).

The following section showcases the results of a direct comparison in expectations between the Western Balkans respondents and their counterparts from the European Union over a period of six years since the inception of the Balkan Barometer[6].

*Table 1: Expectations for financial situation and national economy - comparison 2014/2015/2016/2017/2018/2019 (Share of total, %)*

| | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 |
|---|---|---|---|---|---|---|
| Will be worse – financial situation in household | 31 | 25 | 20 | 22 | 21 | 17 |
| Will be worse – national economy | 42 | 34 | 27 | 26 | 26 | 25 |

*Table 2: What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to the financial situation of your household? What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to the economic situation in (our society)? (Share of total, %)*

| | Better | The same | Worse |
|---|---|---|---|
| **The financial situation in household** | | | |
| Spring 2016 | 22 | 62 | 13 |
| Autumn 2016 | 22 | 63 | 12 |
| Spring 2017 | 23 | 62 | 12 |
| Autumn 2017 | 24 | 60 | 13 |
| Spring 2018 | 24 | 62 | 12 |
| Autumn 2018 | 23 | 60 | 14 |
| Spring 2019 | 25 | 60 | 12 |
| Autumn 2019 | 22 | 62 | 13 |
| **The economic situation in your society** | | | |
| Spring 2016 | 21 | 46 | 26 |
| Autumn 2016 | 22 | 47 | 26 |
| Spring 2017 | 26 | 47 | 21 |
| Autumn 2017 | 27 | 46 | 23 |
| Spring 2018 | 25 | 48 | 23 |
| Autumn 2018 | 21 | 47 | 27 |
| Spring 2019 | 22 | 47 | 26 |
| Autumn 2019 | 19 | 45 | 31 |

*Source: Public Opinion in the European Union, Standard Eurobarometer 85/86/87/88/89/90/91/92 (Spring 2016/Autumn 2016/Spring 2017/Autumn 2017/Spring 2018/Autumn 2018/Spring 2019/Autumn 2019)*

6 European Commission: Standard Eurobarometer 85/86/87/88/89/90/91/92 (Spring 2016 / Autumn 2016 / Spring 2017 / Autumn 2017 / Spring 2018 / Autumn 2018 / Spring 2019 / Autumn 2019: Public opinion in the European Union

The household outlook for EU respondents has been one of remarkable stability; this year's numbers of survey respondents expecting their household situation to improve, deteriorate, or stay the same, are all identical to those recorded in 2014. At the same time, the respondents' expectations regarding their economy have gradually grown bleaker with 2019 registering a record high of survey participants who expect their economies to suffer in the coming year (31%).

At the same time, the corresponding outlook for the Western Balkans community is best characterised as in constant flux. Although a majority of respondents expect change at neither household (48%) nor economy level (43%), the proportion of respondents who anticipate a shift, whether positive or negative, is significantly higher than the EU average for the two categories under review.

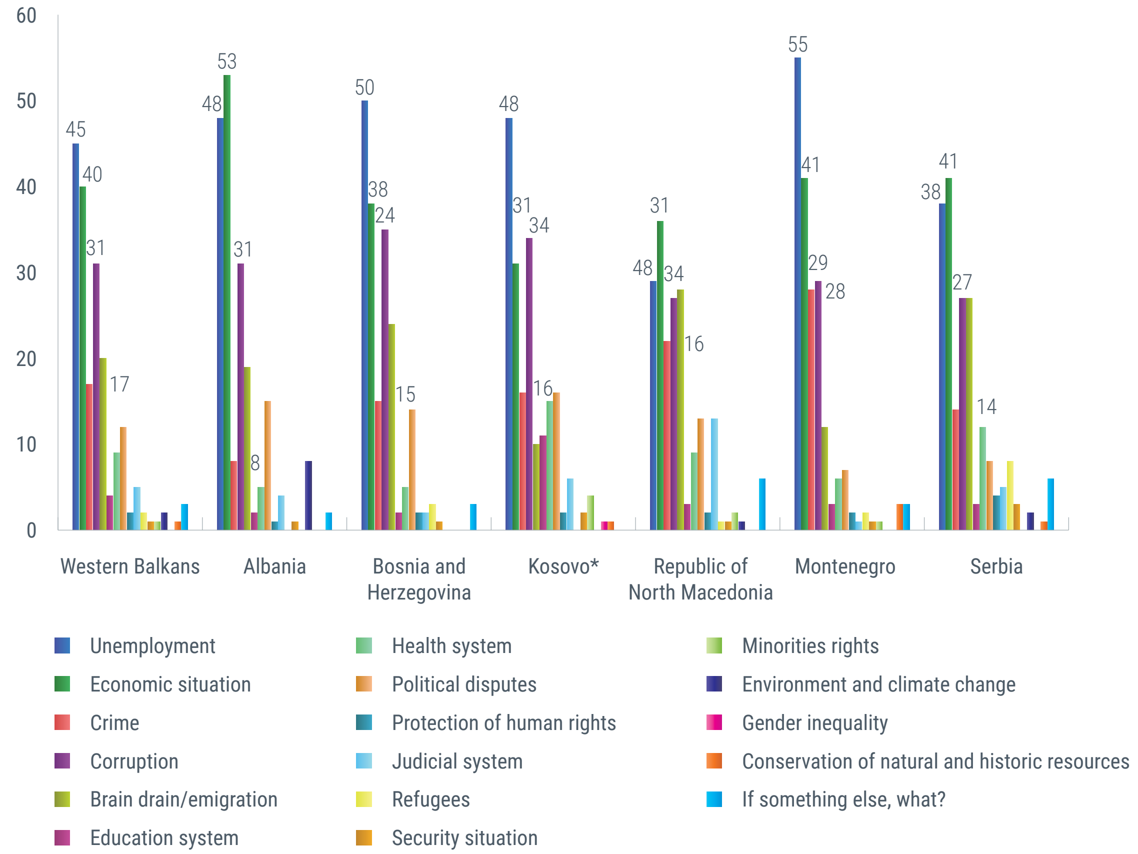
Some 32% of respondents from the Western Balkans expect their household situation to improve over the coming year, against 22% for the EU, indicating a growing sense of optimism within the former region. Although pessimistic respondents from the Western Balkans region outnumber their EU counterparts here as well, the margin is now only four points. Significantly, the percentage of pessimistic respondents at household level in the Western Balkans has declined by 14 points since 2014.

At economy level, close to a third of respondents from the Western Balkans expect their economy to grow in the coming year, versus 19% for the EU. Pessimistic respondents from the EU now outnumber their Western Balkans counterparts by six points. In further good news for the Western Balkans, the proportion of negative respondents in the region has dropped by 17 points since 2014.

The trend of increased optimism in the Western Balkans continues at speed, looking at both individual household and economy levels. At the same time, the EU's outlook continues to be characterised by increasing pessimism for the future.

Nonetheless, fewer than half of all respondents surveyed in the Western Balkans expect no change in status at either economy or household level; this is illustrative of a significant underlying instability where rapid political, social or economic developments can easily upend expectations and bring about an abrupt change in economic status.

**Figure 10: What do you think are the two most important problems facing your economy?**
(All respondents - N=6020, share of total, %)




Unemployment and economic development continue to be the two key problems facing the region, albeit to a significantly lesser degree than in previous years; unemployment is down to 45% from 60% in 2018 and the economic situation is cited as a key challenge by 40% of all respondents, down from 47% in 2018. Corruption is once more ranked third but its prevalence in the region is growing (31%, up from 26% in 2018). Unemployment and the economic situation are listed as a chief concern by three economies each; Montenegro, Bosnia and Herzegovina, and Kosovo* for the former and the Republic of North Macedonia, Serbia and Albania for the latter.

Montenegro, in particular, experiences a high degree of anxiety over unemployment (55%) while in Albania respondents are concerned with the economic situation to a greater extent than elsewhere in the region (53%).

Interestingly, Kosovo* is the only economy where the economic situation is not one of the top two concerns, alongside unemployment, but its place is taken by corruption.

In addition to corruption, brain-drain and crime are frequently cited by respondents as areas of concern with 20% and 17%, respectively. While the number of respondents worried about crime in their economies has remained stable, the proportion of survey participants concerned over brain-drain has surged by seven points in the space of one year. This is illustrative of a broader regional problem with outward migration and the economies' struggles to come to terms with the challenges it poses. The Republic of North Macedonia (28%), Serbia (27%) and Bosnia and Herzegovina (24%) seem especially affected. Montenegro, meanwhile, is home to the highest proportion of respondents worried about crime (28%).

Political disputes are most commonly noted as a problem in Kosovo* (16%), Albania (15%) and Bosnia and Herzegovina (14%).

The region remains primarily concerned with economic considerations and employment but to a progressively lesser degree with each edition of the Barometer. Alongside a decrease in prevalence of unemployment and a reduction in anxieties over the economic situation, there has been a near-proportional surge in the numbers of respondents who fret over corruption and, more recently, brain-drain; the latter, in particular, has seen a 20-point increase since 2014.

The perception on migration is also confirmed by official statistics, albeit not from the Western Balkans, whose migration statistics remain patchy, but rather from the EU Member States that have been reporting a surge of Western Balkans citizens being issued first visas.

As the data above shows, the number of Western Balkans citizens moving to the EU over the five-year period of 2014-2018 has more than doubled. Looking at the migration flows, the familiar patterns of migration emerge, with Germany, Italy, Slovenia, Croatia and Greece featuring as the most prominent destinations for migrating Western Balkans citizens. While this offers only a partial insight into citizens' outward migration - given that this overview includes only the EU/EFTA countries – the picture it paints is stark and requires urgent action. However, in the short-to-medium term, any action taken will need to include not just the WB governments, but also the governments of host countries which need to be engaged to jointly devise programmes that, while not discouraging migration, promote circulation of people and flow of knowledge, capital and networks between the WB Diasporas and their home.

*Table 3: The main concerns in the SEE region – comparison 2015/2016/2017/2018*

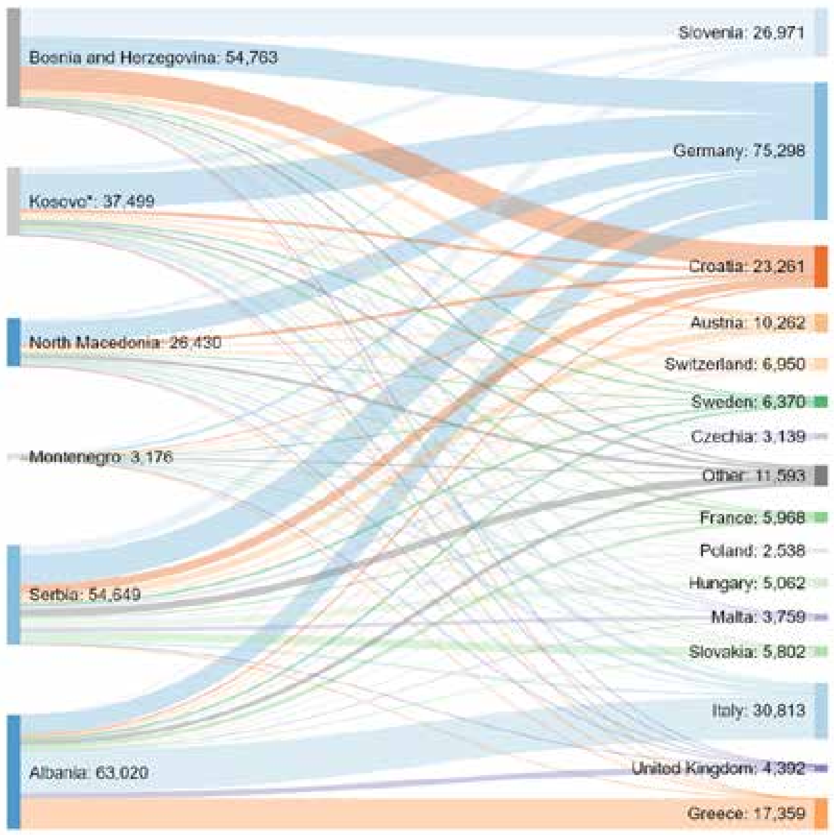
*(Share of total, %)*

| | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 |
|---|---|---|---|---|---|---|
| **Unemployment** | 63 | 67 | 66 | 61 | 60 | 45 |
| **Economic situation** | 58 | 55 | 48 | 46 | 47 | 40 |
| **Corruption** | 16 | 28 | 32 | 29 | 26 | 31 |
| **Brain drain/emigration** | 0 | 7 | 10 | 12 | 13 | 20 |
| **Crime** | 19 | 14 | 17 | 16 | 17 | 17 |

*Table 4: The number of first visas issued to Western Balkans citizens by EU Member States (Eurostat)*

| | 2014 | 2015 | 2016 | 2017 | 2018 |
|---|---|---|---|---|---|
| **No. of first visas issued** | 107,621 | 131,621 | 154,610 | 174,103 | 230,635 |

### Figure 11: Flows of Western Balkans emigrants to the EU/EEA/EFTA during 2018 (Eurostat)




There is likely a strong correlation between lessening concerns over unemployment and rising anxieties over brain-drain as Western Balkans economies start to come to terms with exceptionally high outward migration of skilled labour.

The region is happiest with the quality of utility services (mean 3.1) while least satisfied with the current level of prices (mean 2.1). Compared to last year, there is a notable drop in satisfaction with tolerance and respect of differences (down to 3.0 from 3.2) while dissatisfaction with prices is now even more pronounced (from 2.2 in 2018).

At economy level, Albania is at the bottom of the satisfaction charts across seven different categories, replacing last year's least satisfied economy, the Republic of North Macedonia. Meanwhile, Serbian respondents lead the satisfaction charts in seven out of the 15 categories surveyed.

In addition to tolerance and respect of differences, the following categories recorded a drop in satisfaction by respondents: health services, safety from crime, public services in general and administrative services from central government.

Meanwhile, present job satisfaction and performance of utility services received improved grades from the region's respondents compared to 2018.

This year sees a significant reordering in investment priorities by the region; a long-term leader in the rankings, industrial development (19%), has been relegated to second place by social infrastructure (23%), highlighting widely held concerns over the quality of critical public service providers, such as schools and hospitals. Agricultural development is in third with 17% while investments in small and medium enterprises are supported by 13% of the respondent population.

Overall, and in keeping with last year's survey results, investments in the private sector are losing support by the respondent community, with backing for industrial development and small and medium enterprise sector down by four points each since 2018 and six since 2017.

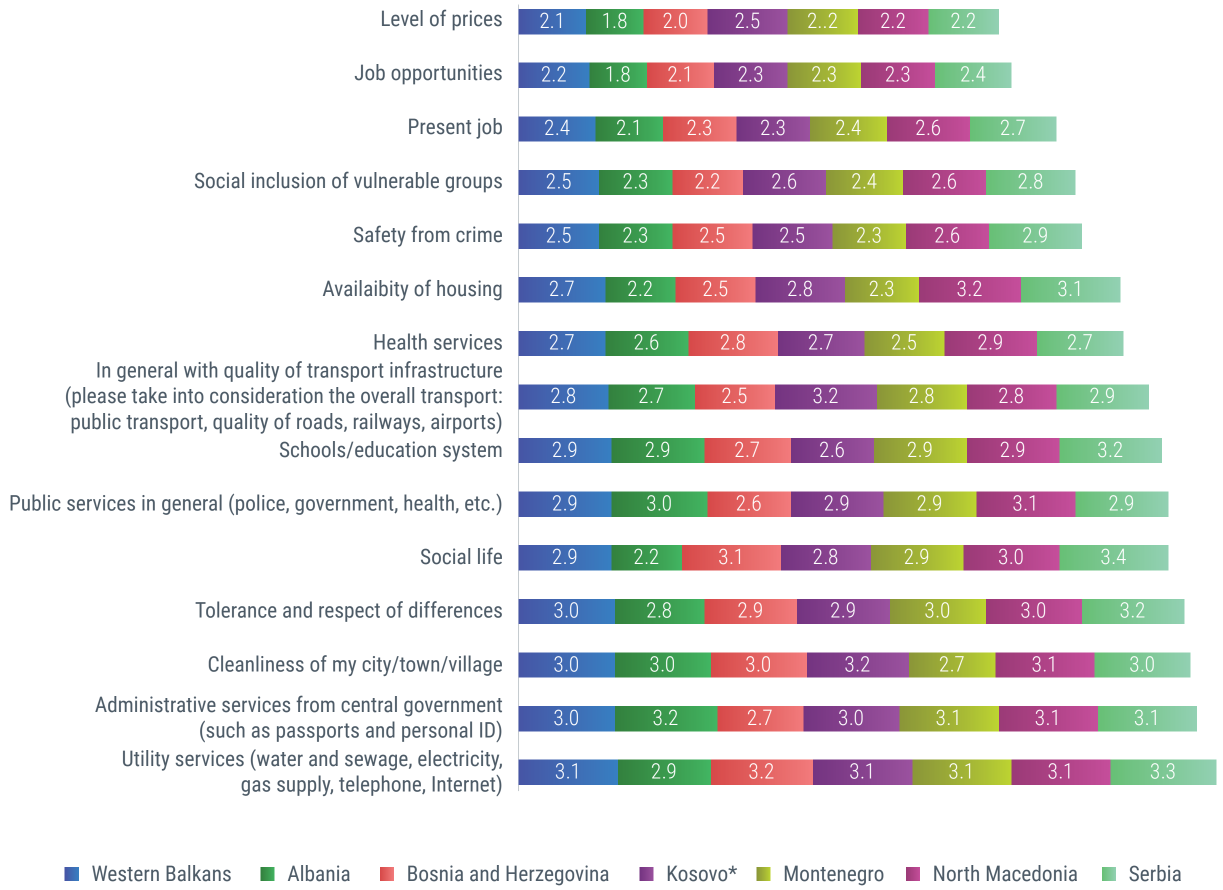
In Kosovo*, almost a third prioritise investment in social service infrastructure (30%) with Bosnia and Herzegovina and the Republic of North Macedonia overwhelmingly supporting investment in industrial development. Once more, Serbia is the leading proponent of investing in agriculture with 23% while, unsurprisingly, Montenegro and Albania (both at 15%) favour investing in tourism at a higher level than elsewhere in the region (15%).





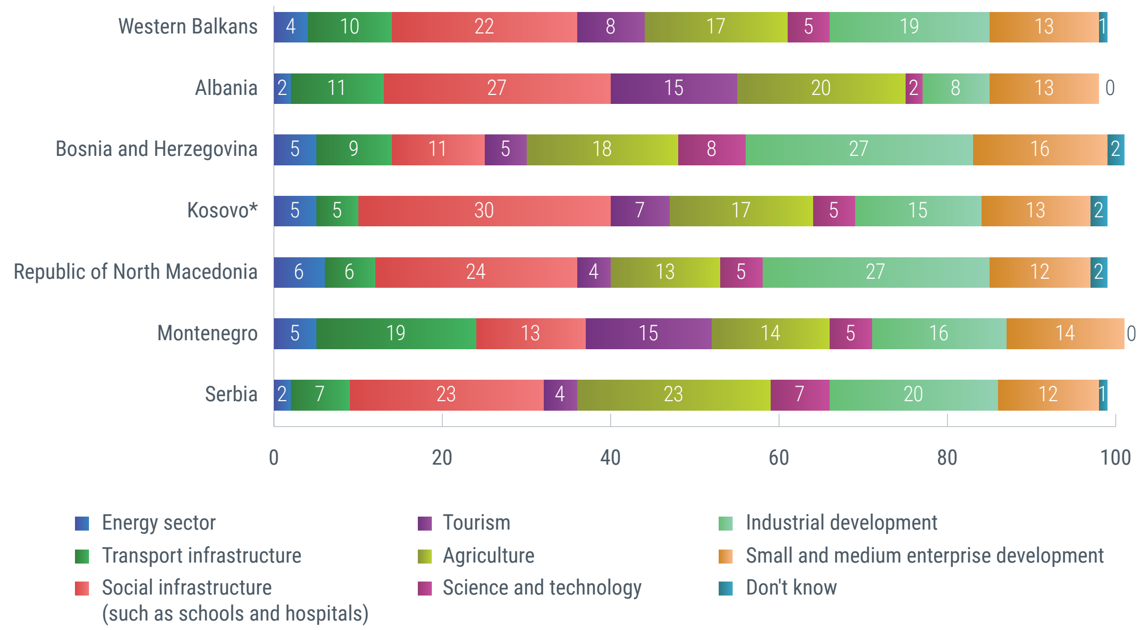
### Figure 12: How satisfied are you with each of the following in your place of living?

(All respondents - N=6020, scale from 1 to 5, mean)




### Figure 13: In your opinion, in which of the following areas should your government invest its resources as a priority?[7]

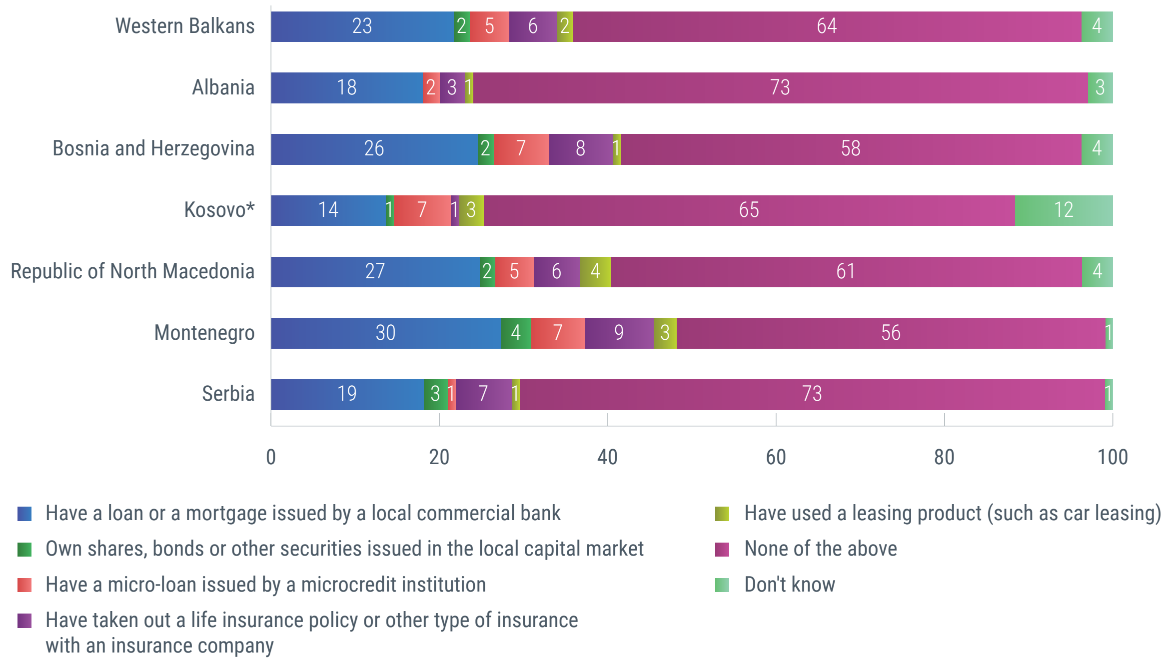
(All respondents - N=6020, share of total, %)




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

**Figure 14: Do you or any member of your household?**[8]

(All respondents - N=6020, share of total, %)




Support for tourism is also growing across the region with a remarkable five-point hike since 2018 (from 3% to 8% in 2019). Sadly, the already low level of investment support for science and technology has declined further and presently stands at 5%, down from 7% in 2018.

Close to two-thirds of all respondents say that they are not currently active in the financial market, whether by taking out a loan, owning stock or having an insurance policy (64%). Fewer than a quarter have loans or mortgages out with a commercial bank (23%), 6% are paying off a micro-loan and 5% have taken out an insurance policy. 2% each own shares, bonds or other securities, and have used a leasing product in the past year.

Violence against women is once more the issue most commonly flagged for action by the region's respondents (57%). Prejudice about gender roles in society is now the second most prevalent concern with 29% of respondents (up by four points since 2018), and inequality in remuneration between men and women is in third with 23%, down by four points since 2018.

Albania leads the region with the percentage of respondents concerned over gender-based violence (71%) while, in another regional high, 40% of respondents from this economy flag perceived prejudices about the image of men and women in society. Meanwhile, a third of respondents from Kosovo* highlight the gender-based wage disparity.

In terms of regional trends, there is an increase in the number of respondents who are concerned over the heightened likelihood of poverty for women, lower life expectancy for men, and the unequal sharing of household tasks between men and women.

Meanwhile, the survey records a relatively substantial decrease in the ranks of those who worry about the disparity in wages between the genders, higher drop-out rates for boys and the low number of women in leading roles in business and government.

Hope is the prevailing sentiment in the region, albeit not by a significant margin. Some 26% of all respondents experience feelings of optimism for the future when asked to describe their relationship to the Western Balkans. The second most numerous group, meanwhile, confesses to having no emotional reaction whatsoever, indicating a lack of a deeper connection to the region (22%). Anxieties over the region, and what it means to its citizens, are widespread with 20% expressing doubts over the very notion of Western Balkans and a further 15% expressing fear as the instinctive emotional reaction. At the same time, only 13% say they feel confident when asked to describe their feelings for the region.

The results of the survey paint an ambivalent picture of the citizens' relation to the wider region. Only 39% associate positive feelings with the region, against some 35% who have an instinctively negative reaction to it. More than a fifth, meanwhile, harbour no feelings for the Western Balkans region, one way or another.

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

**Figure 15: I will read you a list of inequalities which men or women can face. In your opinion, which area should be dealt with most urgently in your economy?**

(All respondents - N=6020, maximum three answers, share of total, %)

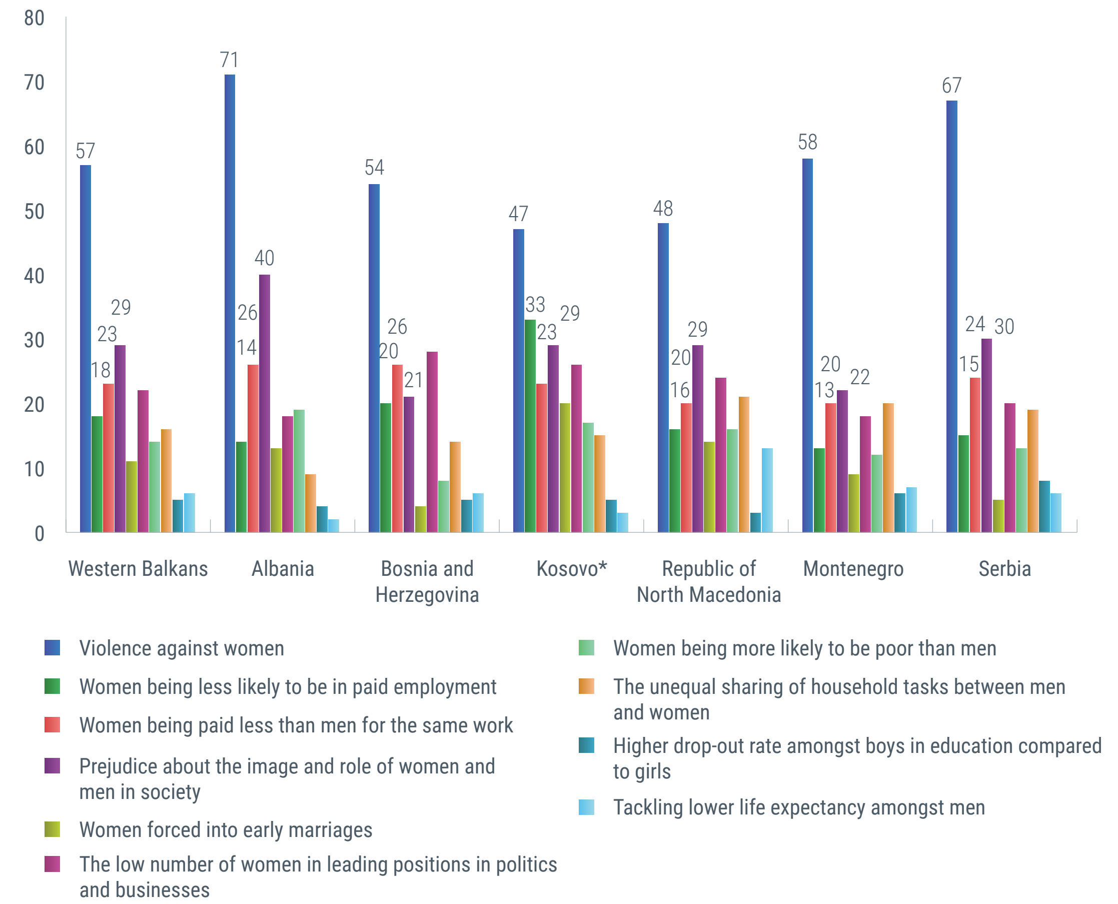
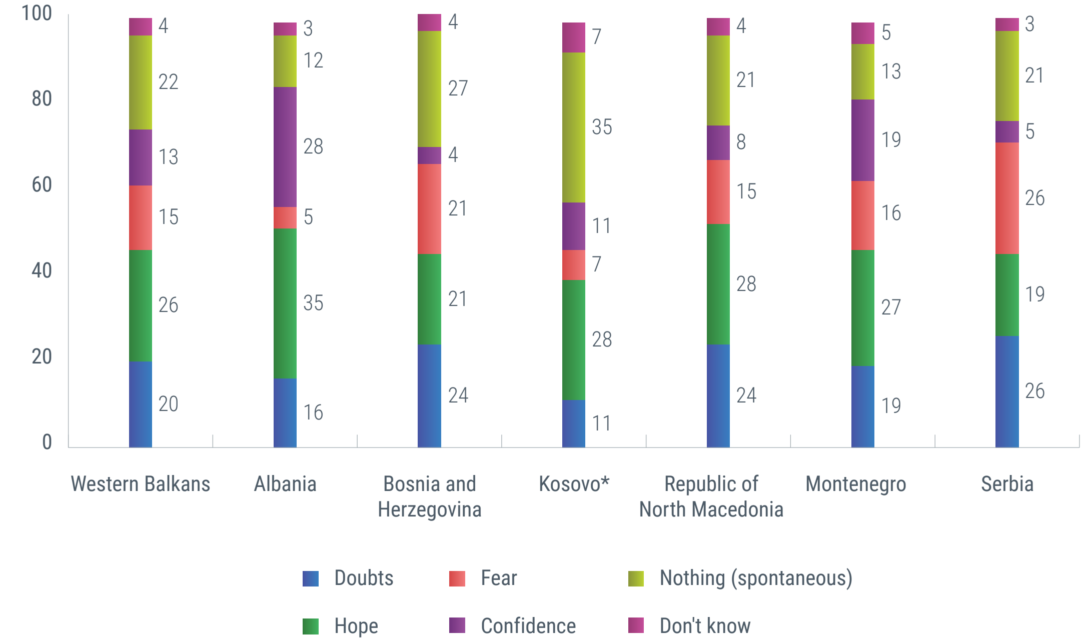


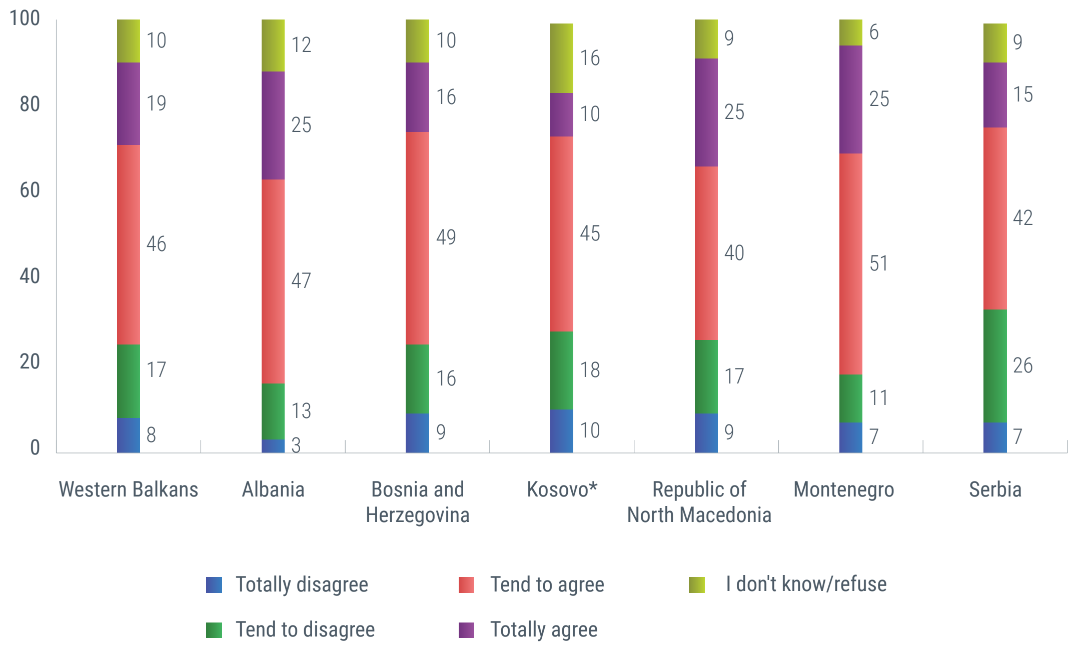

**Figure 16: When you think about the Western Balkans, what feeling first comes to mind?**[9]

(All respondents - N=6020, share of total, %)




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

**Figure 17: To what extent do you agree or disagree with the following statement: What brings Western Balkans citizens together is more important than what separates them?[10]**
(All respondents - N=6020, scale from 1 to 4, share of total, %)




Looking at the individual economies, Albania is the most hopeful (35%) and confident (28%) while Kosovo* is the most detached (35%). Serbia, meanwhile, is the region's most apprehensive economy with the greatest concentration of respondents harbouring doubts (26%) and fears (26%) about the Western Balkans.

An underlying sentiment of solidarity pervades the Western Balkans with close to two-thirds (65%) of all respondents focusing on what brings the region together rather than drives it apart. This is hugely significant as it indicates a sense of shared belonging, at least as far as a considerable majority of the region's residents is concerned. Montenegro is the region's most forceful cheerleader with 76% eager to highlight the ties that bind the Western Balkans; at the same time, a third of respondents from Serbia (33%) disagree with this sentiment, a regional high.

There has been almost no change in perceptions of security at regional level since the 2018 edition of Barometer; respondents unhappy with the security situation in their economy continue to greatly outnumber their more satisfied counterparts, 46% to 24%.

More than two-thirds of the population in Bosnia and Herzegovina are unsatisfied with the security situation at home (69%), making them the region's runaway leader in this category. Meanwhile, Serbia and Montenegro, both at 34%, are the region's most satisfied economies when it comes to the respondents' assessment of the security situation.

The fact that residents who effectively feel unsafe twice outnumber those that do feel safe in large parts of the Western Balkans region should be seen as an urgent call to action for affected governments, especially as they look to tackle new and emerging threats and challenges.

Close to two thirds of respondents across the region (63%) perceive migration as a security risk to their economy, a 1-point increase compared to 2018 results. The framing of the migration issue in the public and private spheres over the past year has also contributed to an overwhelmingly negative sentiment with which the migrants to the Western Balkans have been greeted.

Looking at the individual economies, Serbia is home to the largest number of migration sceptics in the region (83%), followed by Montenegro (76%), Bosnia and Herzegovina (73%), and Republic of North Macedonia (70%), while Albania and Kosovo* have the fewest (33% and 48%, respectively). It is notable that while those associating migration with security threats in Serbia grew in their numbers by 10 points, in Albania, the situation is reverse, with that sentiment dropping by 18 points. This difference in perception can likely also be attributed to the individual migrant workload handled by the respective economies since 2015.

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



**Figure 18: How satisfied are you with the way your economy tackles security challenges?[11]**
(All respondents – N=6020, scale from 1 to 5, share of total, %)[12]

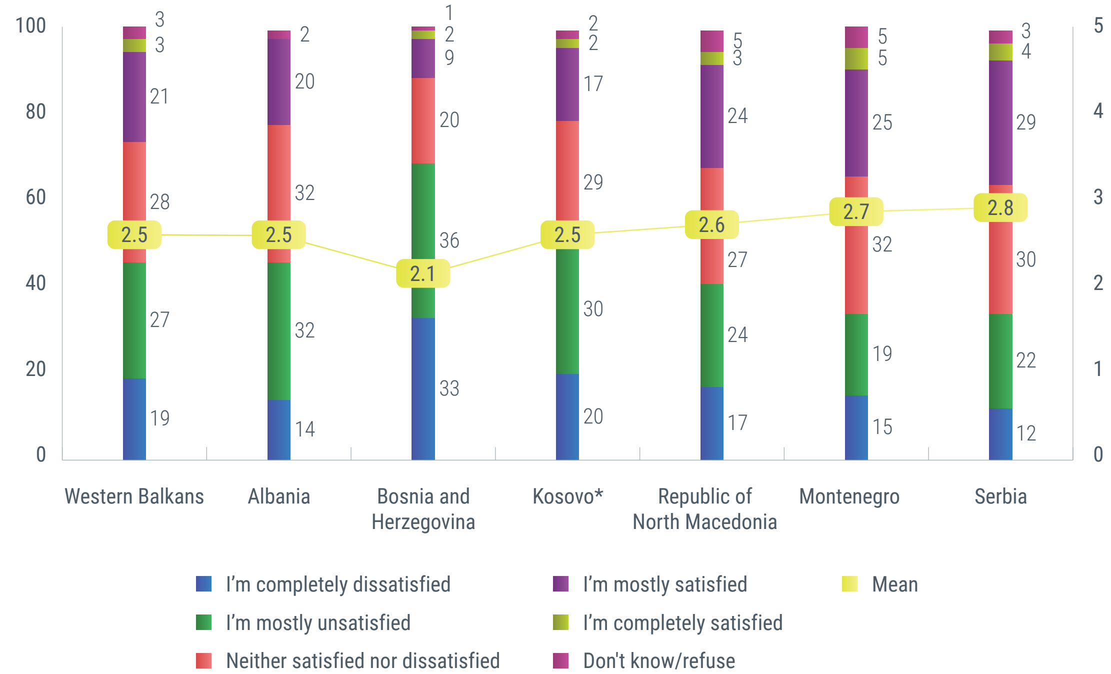
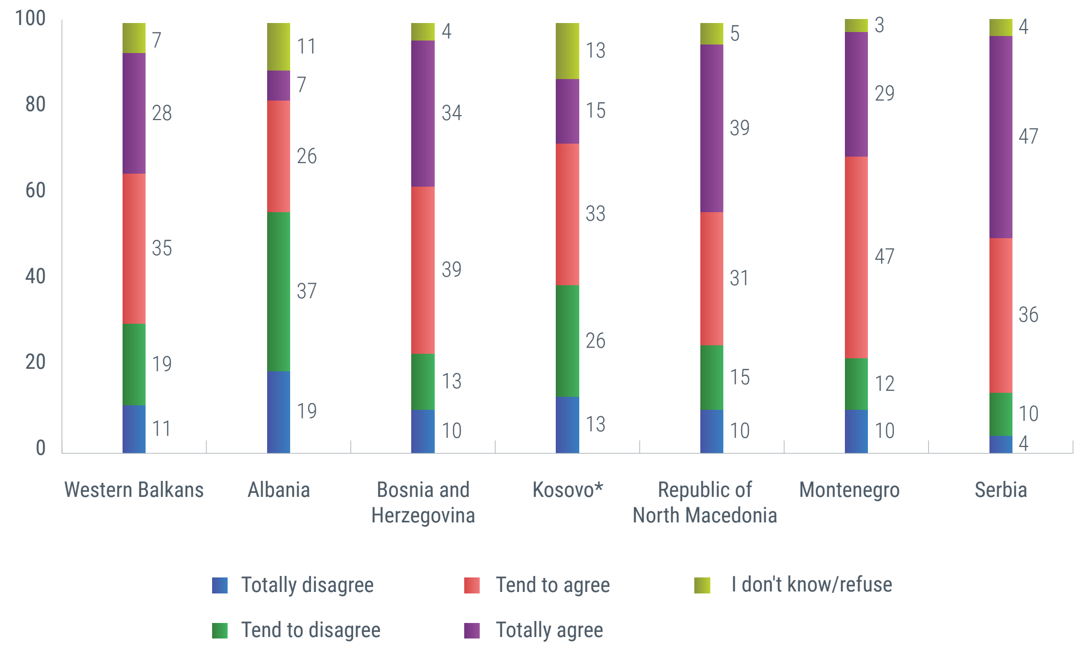



**Figure 19: Do you agree that migrants entering your economy increase security risks?[13]**
(All respondents – N=6020, scale from 1 to 4, share of total, %)[14]




Unsurprisingly, and similarly to the previous year, the largest number of survey respondents point to a lack of employment opportunities and disadvantaged social status as the key motivators behind radicalisation and violent extremism in the region.

11 The wording of the question has been modified compared to the 2018 survey, when the question posed was worded "How satisfied are you with the overall security situation in your economy (as concerns the level of risks of crime, terrorism, problems connected with uncontrolled migration, violent conflicts)?"

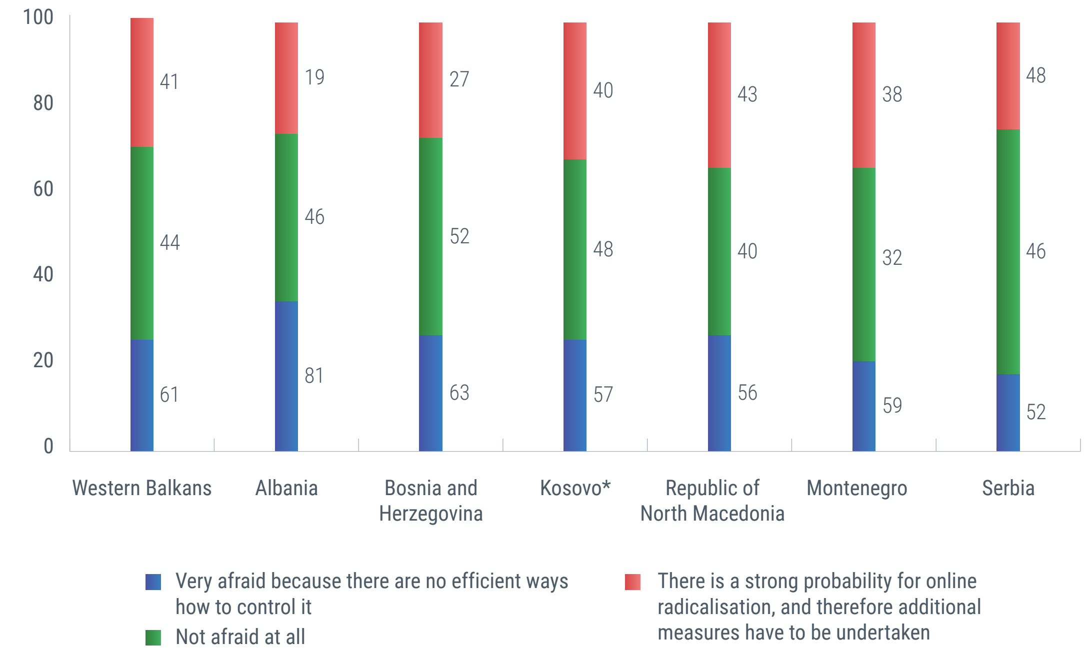
12 The figures might not add to 100% due to rounding.

13 The wording of the question has been modified compared to the 2018 survey, when the question posed was worded "How satisfied are you with the overall security situation in your economy (as concerns the level of risks of crime, terrorism, problems connected with uncontrolled migration, violent conflicts)?"

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

**Figure 20: Which factors do you think contribute the most to radicalisation and violent extremism in your economy today?[15]**
(All respondents – N=6020, multiple answers, %)


**Figure 21: To what extent are you afraid of your children or young relatives and friends getting radicalized online?[16]**
(All respondents – N=6020, share of total, %)[17]




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

16 The wording of the question has been modified compared to the 2018 survey, when the question posed was worded "How satisfied are you with the overall security situation in your economy (as concerns the level of risks of crime, terrorism, problems connected with uncontrolled migration, violent conflicts)?"

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





Considering the still relatively high unemployment rates across the SEE region, better economic policies appear warranted also as a strategy to combat radicalisation. In addition, the second most frequent response (44%) identifies weakness and inability of welfare institutions to protect vulnerable groups at risk from radicalisation, followed closely by propaganda/fake news (41%) and social media (31%).

Better economic opportunities are clearly a key building block of any effective de-radicalisation programme, and a more holistic approach is needed by the governments and other actors in the region in tackling the problems of radicalisation and violent extremism across the Western Balkans.

**Figure 22: How threatened do you feel by the illegal possession and misuse of weapons in your neighbourhood (as in crime, domestic violence, celebratory shooting, etc.)?[18]**
(All respondents – N=6020, share of total, %)[19]

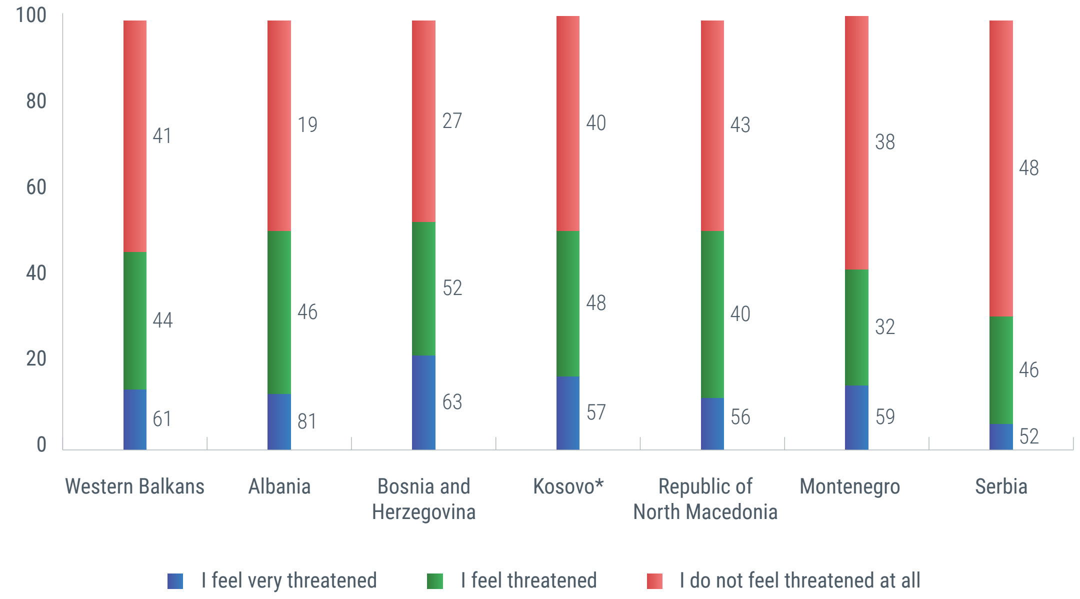
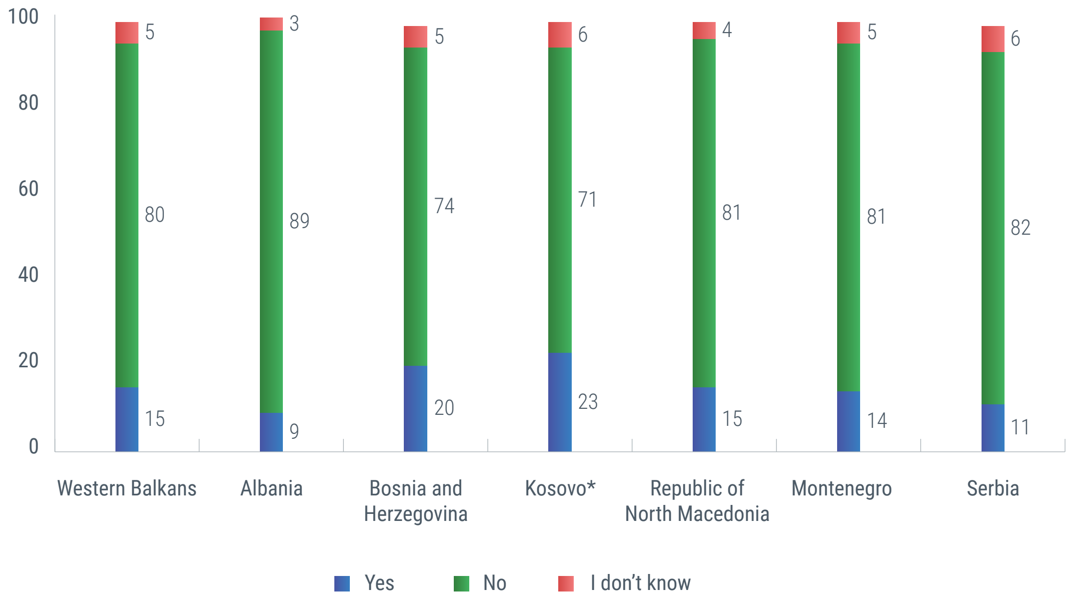



**Figure 23: Would you consider owning a gun?[20]**
(All respondents – N=6020, share of total, %)[21]



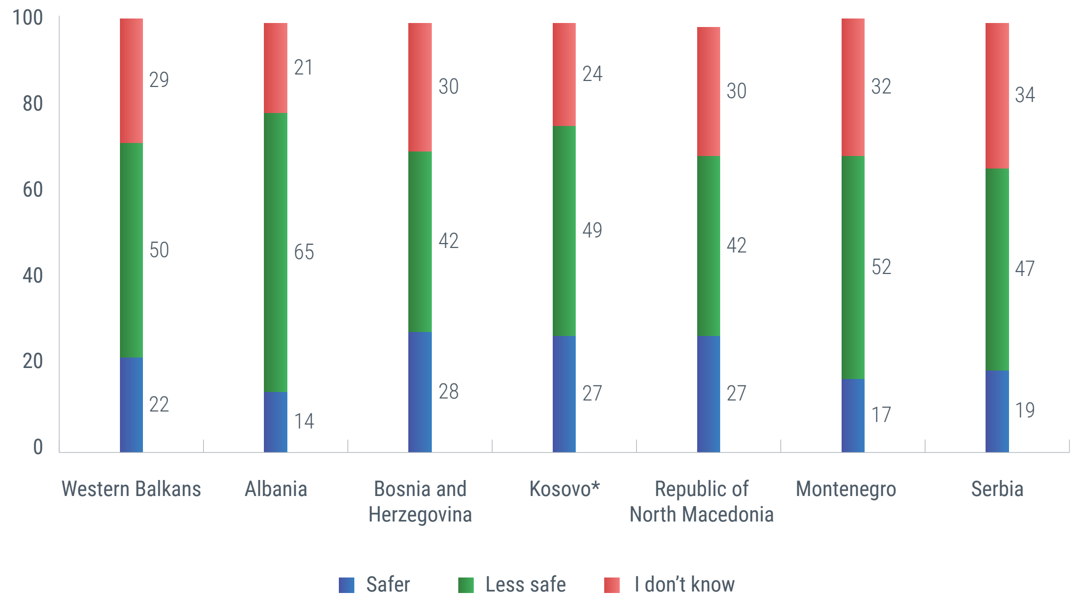

18 The wording of the question has been modified compared to the 2018 survey, when the question posed was worded "How satisfied are you with the overall security situation in your economy (as concerns the level of risks of crime, terrorism, problems connected with uncontrolled migration, violent conflicts)?"

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

20 The wording of the question has been modified compared to the 2018 survey, when the question posed was worded "How satisfied are you with the overall security situation in your economy (as concerns the level of risks of crime, terrorism, problems connected with uncontrolled migration, violent conflicts)?"

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

Figure 24: Would having a gun at home make you feel: [22]
(All respondents – N=6020, share of total, %)[23]




The threat of online radicalisation is clearly perceived as a serious and present danger across the region, with more than a quarter of respondents signalling fear of this channel for radicalisation. Further 30% of respondents call to action, challenging the governments to come up with clear measures to stem online radicalisation.

While the governments have been for some time-focusing on technical solutions to remove or block radicalising material, a broader approach is probably warranted. Successful attempts at minimising online radicalisation have usually combined some forms of technical solutions with creating an environment in which the production and consumption of radicalising materials become not just more difficult in a technical sense but unacceptable, as well as less desirable. A good start in this sense would be countering and sanctioning online hate speech which is widespread and rarely sanctioned in the region.

Roughly half of respondents in Bosnia and Herzegovina (53%), Republic of North Macedonia (51%) and Kosovo* (50%) feel threatened by the illegal use of weapons, indicating a worrisome trend for public safety and security. At the same time, Serbia has the highest proportion of respondents who do not feel at risk from illegal gun use (69%).

Gun ownership and gun safety are two questions where there is a broad consensus in the region. An overwhelming majority of respondents (80%) indicated no desire for owning a gun. Furthermore, more than twice as many respondents (50% vs. 22%) feel less safe having a gun at home than not having one.

On the other hand, these sentiments are difficult to reconcile with the fact that gun ownership in the region is already high, with a number of Western Balkans economies featuring on the top 20 list of countries with highest gun ownership. According to the Small Arms Survey (2017), the six economies of the Western Balkans are a home to approximately 5.5 million privately owned firearms.

22 The wording of the question has been modified compared to the 2018 survey, when the question posed was worded "How satisfied are you with the overall security situation in your economy (as concerns the level of risks of crime, terrorism, problems connected with uncontrolled migration, violent conflicts)?"

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





# ATTITUDES ON REGIONAL COOPERATION AND EU INTEGRATION

Regional cooperation continues to grow in prominence with an overwhelming majority of respondents supportive of its role in improving the political, economic and security situation in their home economies. Furthermore, and after several years of stagnation, there is a marked increase in interest in regional affairs by the surveyed population, indicating untapped potential for greater engagement within the region.

However, with 2020 no longer a viable accession target for SEE economies, there is a marked revival of pessimism with regards to the region's EU integration prospects. The number of respondents who do not see EU future for their economy now exceeds a quarter of all respondents surveyed. At the same time, support for EU membership is growing across much of the region with 59% endorsing accession (a cumulative ten-point increase on 2017).

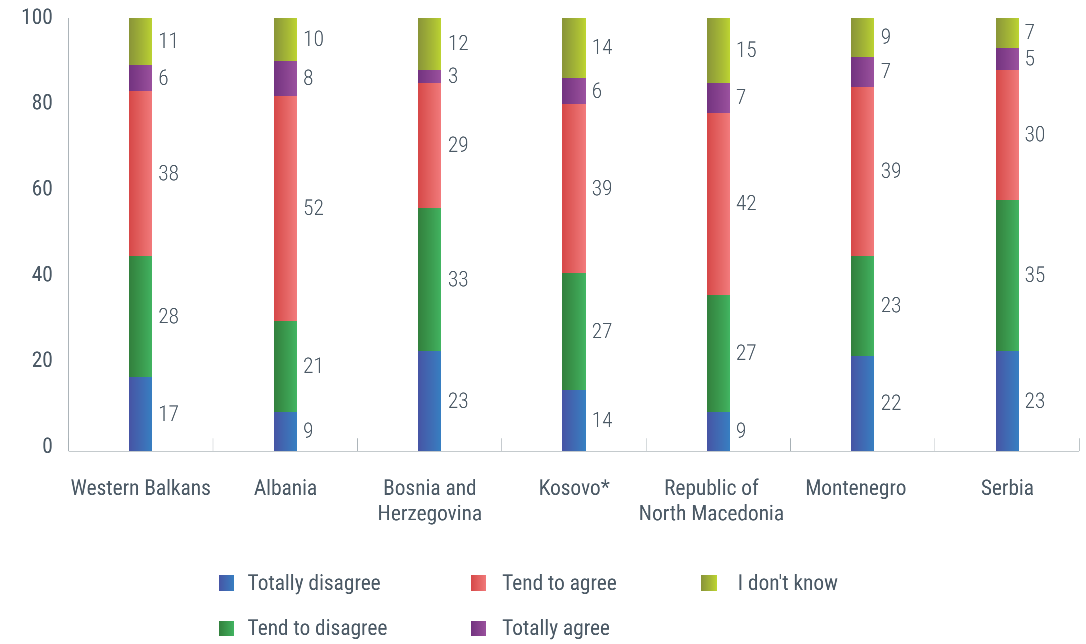
Finally, while economic property continues to be associated with EU membership more than any other prospective benefit, the ability to work and study abroad is now cited by more than a third of all respondents, a major hike compared to 2018. This is illustrative of an overall regional trend of outward migration that appears to be growing, with whatever efforts invested by the region's governments to arrest "brain drain" apparently having little effect.

There has been virtually no change in the appraisal of regional relations with an almost equal distribution of survey participants between those observing no improvement in this regard (45%) and those that can testify to positive changes in how regional economies interact with each other (44%).

The encouraging trend of incremental increases in positive appraisal by survey respondents, noted in several previous instalments of the Barometer, has now been arrested.

In terms of how the individual economies view regional developments, Serbia has overtaken Bosnia and Herzegovina as the region's leading critic of regional developments, with 58% of the respondent population noting no progress whatsoever in relations between the region's economies. The perception of regional relations by respondents from Serbia has continued to deteriorate with an overall 15-point increase in the number of negative appraisals by survey participants since 2017.

Figure 25: Do you agree that the relations in SEE are better than 12 months ago?
(All respondents - N=6020, scale from 1 to 4, share of total, %)



Bosnia and Herzegovina remains near the top of the rankings with 56% of negative appraisals, albeit with a five-point drop compared to 2018 and, more significantly, an 18-point decrease since the 2017 instalment of the Barometer.

At the other end of the scale, Albania continues to hold a largely optimistic view of regional developments with some 60% of respondents confident of progress in the region, followed by North Macedonia in distant second with 49%.

Regional cooperation continues to grow in prominence with an overwhelming majority of respondents supportive of its role in improving the political, economic and security situation in their home economies (77%, up from 74% in 2018).

The number of respondents sceptical of regional cooperation has fallen under 20% across all of the participating economies, down from three in 2018 (Bosnia and Herzegovina, Kosovo* and North Macedonia).

Positive respondents from Montenegro top the rankings with 84% supportive of the role played by regional cooperation, followed by respondents from Albania (82%) and North Macedonia (79%). At the other end, with 68% of positive respondents, Kosovo* has the lowest degree of confidence in the constructive power of regional cooperation.

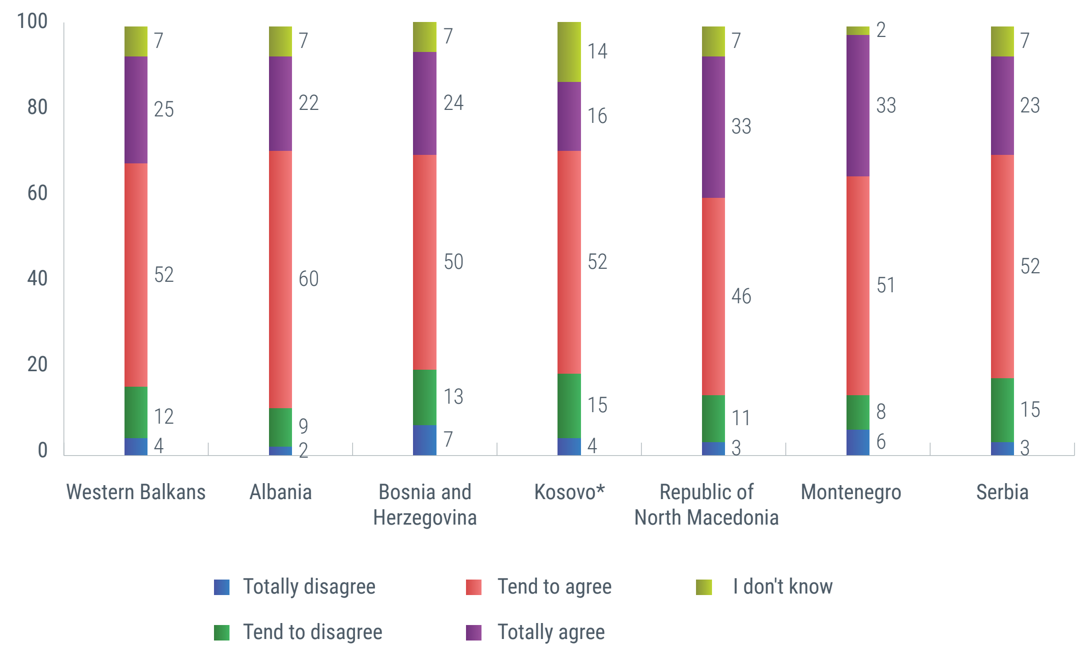
After several years of the region's respondents almost evenly dividing into those with an interest in regional developments versus those with little appetite for neighbourhood affairs, there has been a marked increase in the ranks of the former: according to survey results, some 61% of all respondents now claim an interest in the region, a 15-point hike compared to 2018, and an important indicator that regional relations are on an upward trajectory.

Looking at the individual economies, Albania deserves much credit for this remarkable development as it is by far the economy now most concerned with regional engagement (75%), a striking turnaround considering its position near the bottom of the rankings a mere 12 months ago (36%). Encouragingly, all other economies have recorded increases in interest as well, with half of all respondents in Bosnia and Herzegovina monitoring regional developments, up by 16 points from 2018.

The trend of opening up towards the region stands in stark contrast to the findings of the 2018 Barometer where all regional economies, bar Serbia, signalled further disengagement from the region.

The majority of respondents claim they try to keep current on developments across the region as a whole (36%) with Serbia and Kosovo* singled out as the two economies of special interest to the largest number of individual respondents (16% and 15%,

**Figure 26: Do you agree that regional cooperation can contribute to the political, economic or security situation of your society?[24]**
(All respondents - N=6020, scale from 1 to 4, share of total, %)




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





**Figure 27: Overall, are you interested in news and information about the rest of the SEE region (Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, Republic of North Macedonia and Serbia)?[25]**
(All respondents – N=6020, share of total, %)

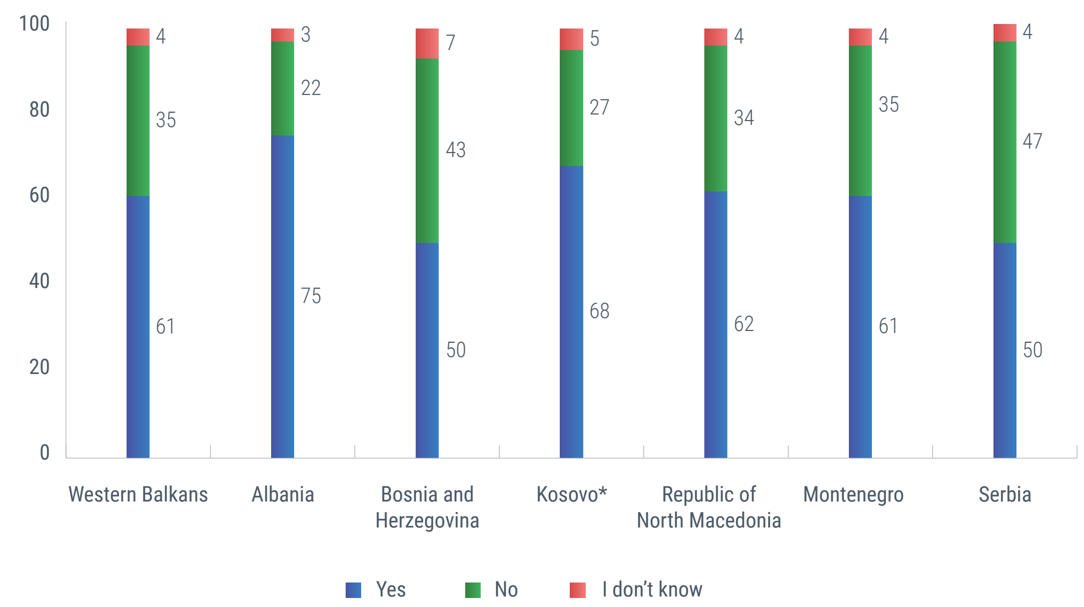
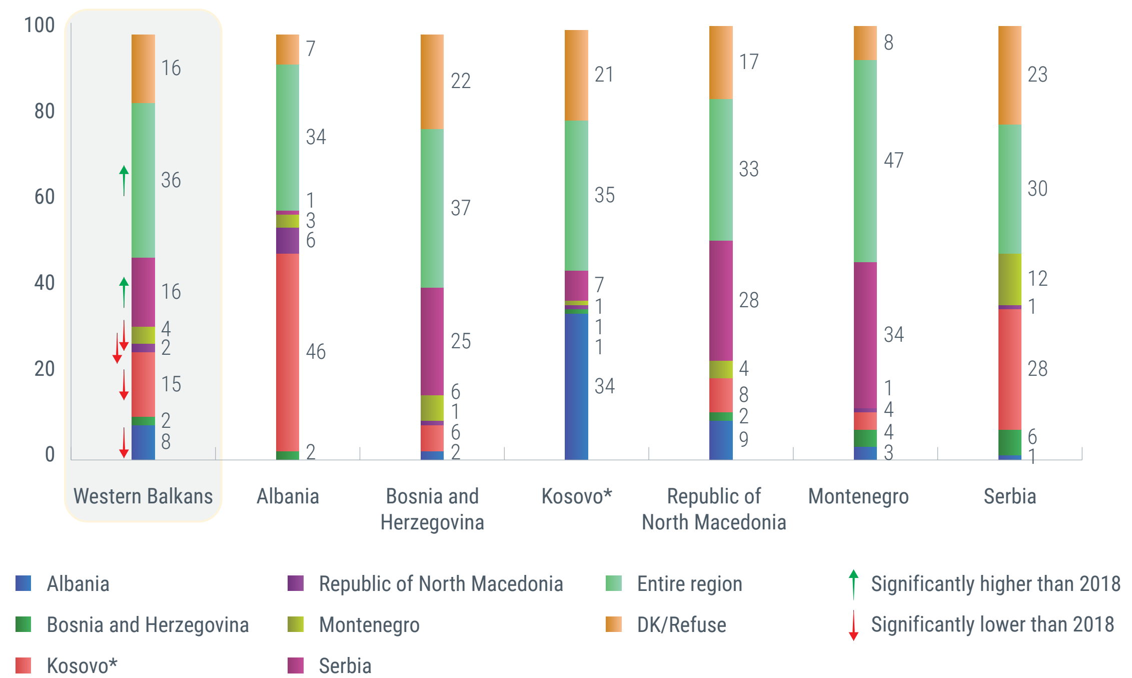



**Figure 28: To whom in the SEE region are you paying close attention?[26]**
(All respondents - N=6020, first answer, share of total, %)



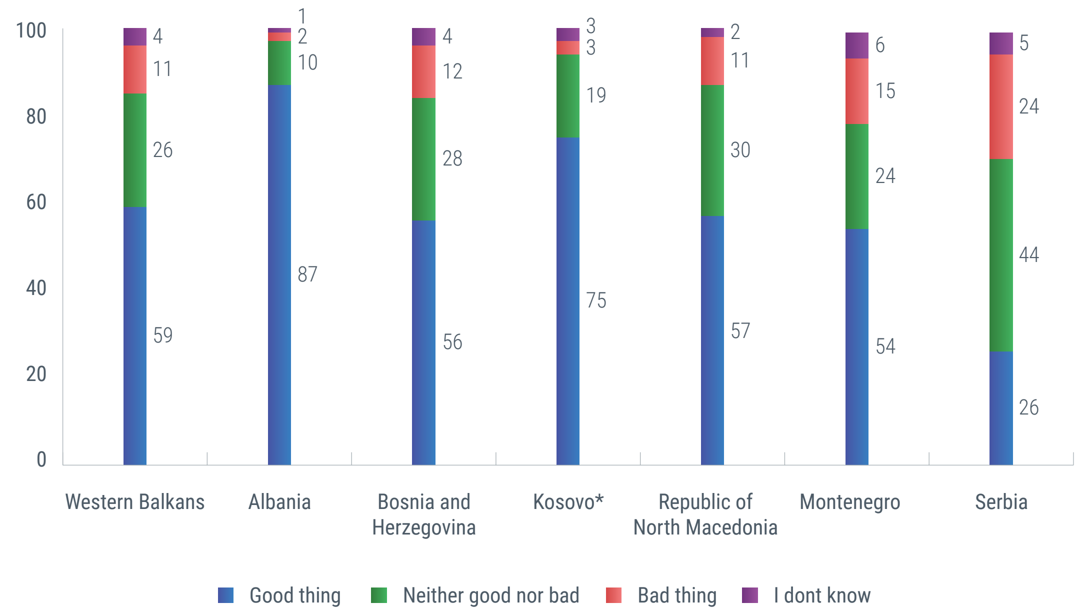

respectively). In terms of individual economies, respondents from Albania most commonly cited Kosovo* as the economy they pay most attention to, and vice versa, with Kosovo* respondents most interested in developments in Albania.

There has been a noted increase in support for EU membership across much of the region with 59% endorsing accession (up from 56% in 2018 and 49% in 2017), with consecutive editions of the Barometer now recording support by more than half of all respondents. At the same time, the number of neg-

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

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

**Figure 29: Do you think that EU membership would be a good thing, a bad thing, or neither good nor bad for your economy?[27]**
(All respondents – N=6020, share of total, %)




ative respondents has decreased, albeit by a single point, with 11% a record low for this category since the Barometer's inception. The number of neutrals has also recorded a drop, in this instance by two points.

Serbia remains the only economy in the region where EU accession is supported by fewer than one third of all respondents, with those in favour and against split almost evenly (26% and 24%, respectively). Albania and Kosovo* are once more the EU's biggest cheerleaders in the region, with 87% and 75%, respectively, viewing membership as a positive development. Support for the EU in Kosovo* has rebounded, after dropping 15 points in the previous instalment, and is now up by six compared to 2018.

Nearly a third of all respondents from North Macedonia view accession as neither good nor bad (30%), still a significant drop (-6) compared to the previous instalment. Bosnia and Herzegovina records a substantial increase in support for the EU with 9 points added to this group at the expense of both neutrals and those opposing EU membership.

Economic property continues to be associated with EU membership more than any other prospective benefit – 44% of respondents have ranked it the highest, up by a single point from 2018. The second ranked issue, however, has shifted rather dramatically, with the ability to work and study abroad now cited by 37% of respondents as a key benefit, compared to just 25% in 2018. This is illustrative of an overall regional trend of outward migration that appears to be growing, with whatever efforts invested by the region's governments to arrest "brain drain" apparently having little effect. Travel (28%) and peace and stability (25%) are the third and fourth ranked benefits respectively, as perceived by the region's respondent population. The number of respondents who perceive EU integration as a threat to their economy's sovereignty has dropped by a point and now stands at 8% while the number of respondents who fail to see anything positive arising from membership is up by two points and stands at 9%.

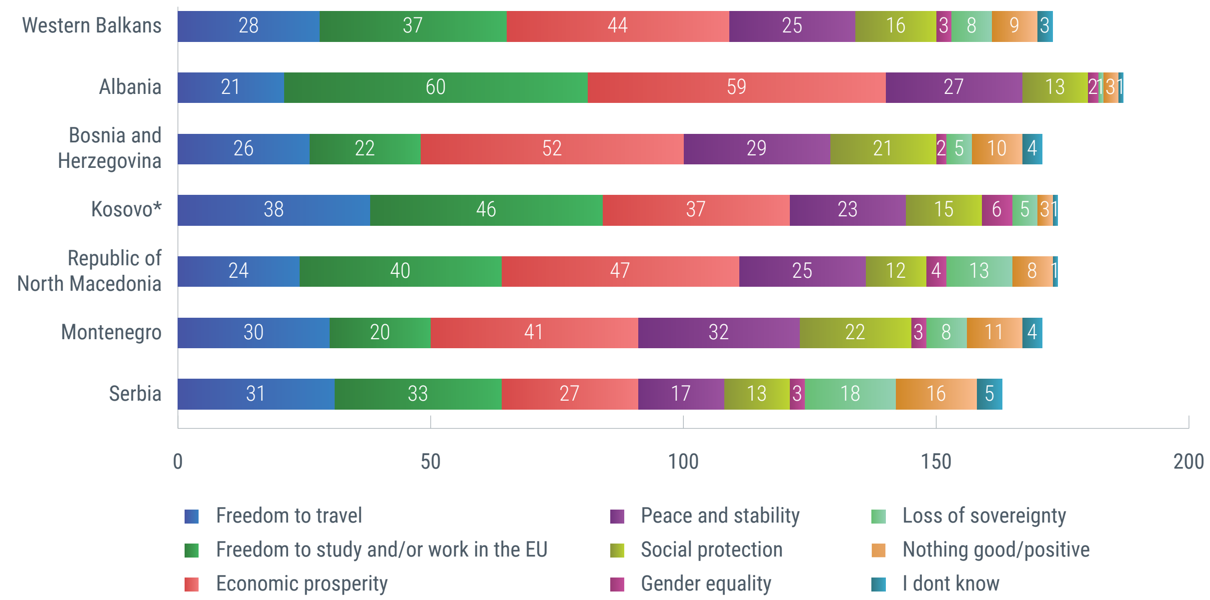
*Table 5: Sentiments on EU membership – comparison 2014/2015/2016/2017/2018*

*(Share of total, %)*

| | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 |
|---|---|---|---|---|---|---|
| Good | 42 | 41 | 44 | 49 | 56 | 59 |
| Bad | 20 | 21 | 19 | 15 | 12 | 11 |
| Neither good nor bad | 35 | 33 | 32 | 30 | 28 | 26 |

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

**Figure 30: What would EU membership mean to you personally?**
(All respondents - N=6020, first two answers, %)

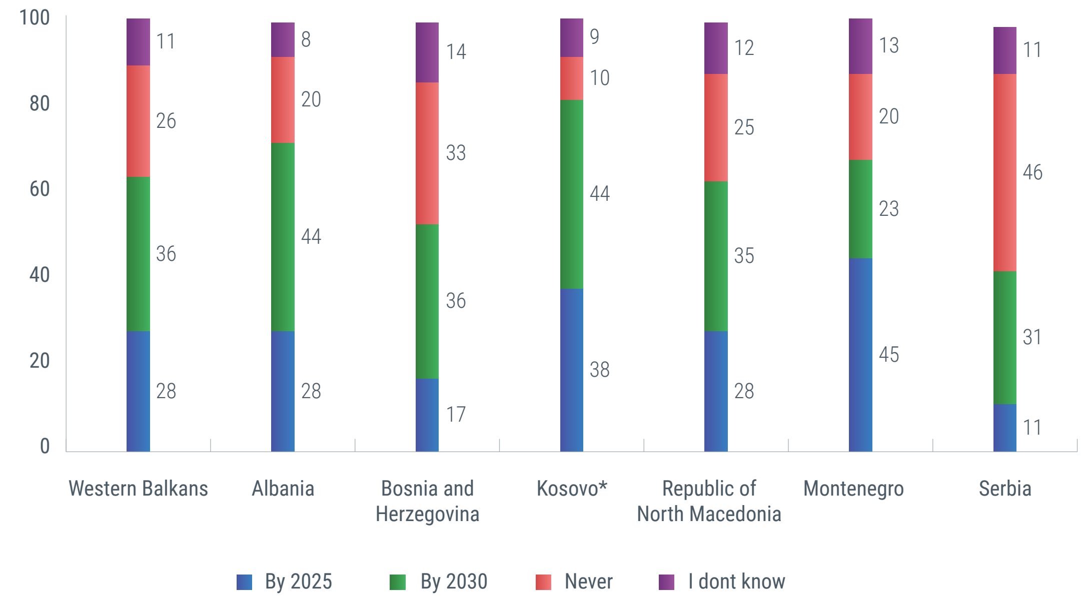



Albania with 59% and Bosnia and Herzegovina with 52% lead the charts when it comes to prioritising economic prosperity as a product of EU accession, with Albania, again, and Kosovo* most interested in the ability to study and work abroad (60% and 46%, respectively).

Respondents in Serbia are again most concerned about the prospects of EU membership with 18% viewing accession as a threat to sovereignty and 16% express general misgivings about membership, i.e. feel that nothing good will come of it.

With 2020 no longer a viable accession target for SEE economies, there is a marked revival of pessimism with regards to the region's EU integration prospects. The number of respondents who do not see an EU future for their economy has rebounded to the 2017 high of 26%, up from 20% in 2018; the extreme pessimists now worryingly make up

**Figure 31: In general, when do you expect the accession of your economy to the EU to happen?[28]**
(All respondents – N=6020, share of total, %)




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

more than a quarter of the overall respondent population.

The number of individuals surveyed who expect EU integration of their home economies by 2025 has interestingly held firm at 28%. Unlike last year's results, however, this is no longer the most numerous category of respondents, with that distinction going to the group of respondents who now expect to see EU integration by 2030; somewhat strikingly, this group now makes up more than a third of the overall respondent population with 36% and has grown by 13 points in the space of one year. This is again indicative of a more sombre, and likely realistic, outlook on the region's accession prospects.

Albania, where more than a quarter of the population previously believed EU integration would happen by 2020 - even as late as 2018 (26%) - is now suffering from a bout of EU scepticism with nearly half of the population (44%) anticipating EU integration no sooner than 2030 – this number is up by an incredible 20 points compared to the 2018 survey. The group of respondents who feel that accession may never happen now make up a fifth of the population, up 9 points from 2018.

Kosovo*, the region's biggest optimist, where the respondents expecting accession by 2020 made up a third of the population in 2018, is still rather upbeat with 38% now anticipating EU membership by 2025, the nearest date offered in the 2019 survey. However, it is Montenegro that boasts the highest proportion of optimistic respondents with 45% hopeful of accession by 2025. At the other end of the scale is Serbia where the number of respondents who feel accession may never happen now make up almost half of the respondent population (46%) and this number is up by 13 points compared to the previous instalment. Bosnia and Herzegovina is the region's second biggest pessimist with a third of the population (33%) not expecting to join the EU family.



# UNEMPLOYMENT AND RISK OF POVERTY

An overwhelming majority of respondents continue to identify as average with an encouraging decline in the number of the "below-average" survey participants. Remarkably, Serbia reports significant improvement in the socio-economic status of its citizens with a ten-point surge in the number of average households and a near-identical drop in the number of below-average survey respondents (-11), a clear indicator of upward mobility.

Following an incremental but steady decline in popular perceptions of inequality, the number of respondents who feel that the wealth gap is widening is on the rise. Interestingly, this perception seems to diverge somewhat from the findings of the socio-economic identification exercise where the number of below-average respondents is declining with the ranks of the so-called middle class growing accordingly. Perceptions of self, versus those of society at large, again seem to be in disconnection.

In the wake of an alarming drop in 2018, number of respondents reporting to be employed across the region has rebounded strongly with a cumulative seven-point hike over a period of just 12 months. All of the region's economies, with the exception of Montenegro, have added significant numbers to their employment ranks; Albania, in particular, has seen a remarkable 18-point increase in overall employment since the last survey (up to 53% from 33% in 2018) with Serbia in second with 11-points. The figures represent a dramatic and welcome departure from last year's Barometer when only two economies reported limited growth in employment.

Fewer than a quarter of the Western Balkans' population are anxious about falling below the poverty line, a substantial 9-point decrease over just 12 months (31% in 2018) and a positive marker for the economic health of the region. Albania, previously the economy with convincingly the highest proportion of individuals at risk (45% in 2018), now reports an upturn in economic status with just over a quarter perceived as potentially on the brink of poverty (26%). The two leading obstacles to employment cited in 2018 continue to top the rankings, albeit in reverse order; not knowing the right people is now top, while a shortage of adequate jobs is now second with roughly a third of respondents citing it as the chief obstacle to gainful employment. The perceived levels of nepotism in hiring are a major cause for concern and indicate that trust in employers, whether private or public, is at a low and must

**Figure 32: How would you estimate your current socio-economic status? Do you live above the average, average (as majority) or below the average? (Self-estimation)[29]**
(All respondents - N=6020, share of total, %)


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

be addressed in a structural manner by the region's economies.

The trend of growth in volume of remittance payments across the region continued into 2019, with nearly a quarter of all respondents surveyed reporting receiving assistance from abroad.

At the same time, respondents who reported feeling excluded overwhelmingly blamed the lack of jobs as well as membership in an overlooked age group. The prominence of the latter is a relatively recent development indicating that some parts of the region are aging at a higher pace than others, with Serbia especially at risk from negative demographic trends.

As with the previous instalment of the Barometer, the overwhelming majority of survey respondents across the region describe their socio-economic status as average (71%). The latest survey does record a two-point bump in the number of respondents who self-identify as average, accompanied by a more substantial four-point drop in the ranks of the below-average survey participants. The number of above-average respondents has also grown by a respectable two points and now stands at 5% of the overall survey population.

This indicates that after several years of relative stagnation in perceptions of socio-economic status, improvements in the overall economic situation seem to be finally translating into some tangible benefits for households across the region.

Kosovo* and Bosnia and Herzegovina report the highest proportion of average households (78%), while Montenegro (31%) and Albania (30%) are home to the highest number of respondents who self-identify as below average. Compared to the 2018 edition of the Barometer, Serbia has recorded the biggest improvement in the socio-economic status of its citizens with a ten-point hike in the number of average households and a near-identical drop in the number of below-average householders (-11). The number of above-average respondents has also grown by some two points rounding up what appears to be a very prosperous year for the Serbian economy.

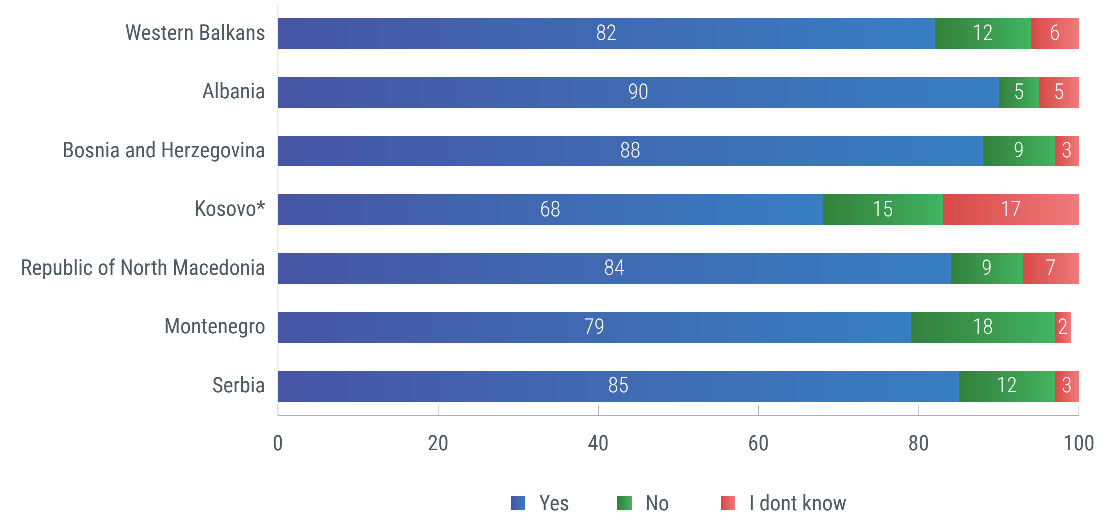
Kosovo* has seen an incredible six-point hike in the number of above-average respondents with that group now making up a tenth of the total surveyed population (10%).

Meanwhile, Montenegro is the only economy in the region to report an increase in the number of below-average households (+4), although the number of above-average respondents from this economy has doubled at the same time (from 2% to 4%).

Following a nine-point drop over a period of five years that indicated a decrease in the perception of a widening wealth gap (from 88% in 2015 to 79% in 2018), the number of respondents who feel inequality is once more on the rise (up by three points to 82%).

Interestingly, this perception seems to diverge somewhat from the findings of the socio-economic identification exercise (see Figure 26) where the number of below-average respondents is decreasing with the ranks of the so-called middle class swelling accordingly.

**Figure 33: Do you think that the gap between the rich and the poor is increasing in your economy?[30]**
(All respondents - N=6020, share of total, %)




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





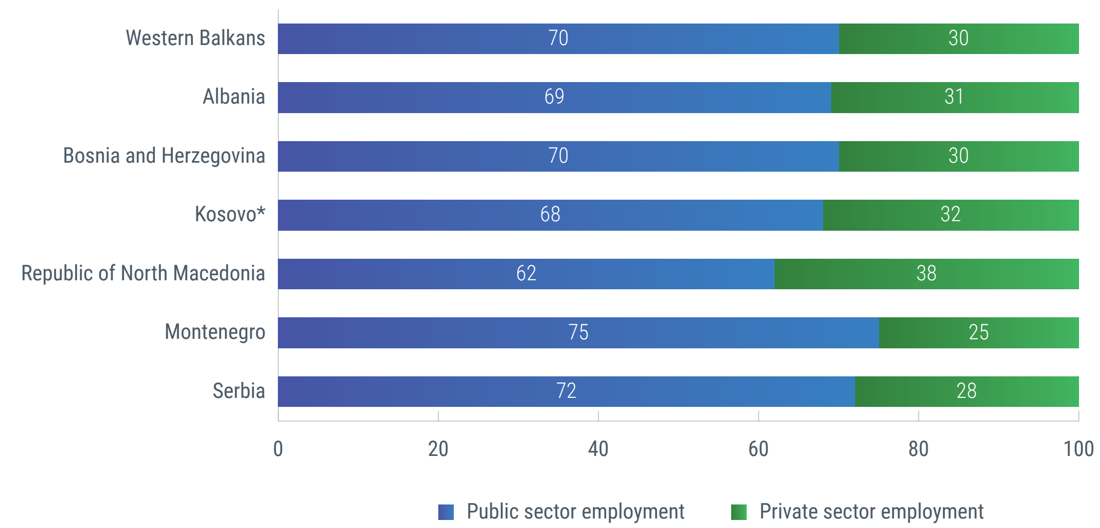
Albania (90%) and Bosnia and Herzegovina (88%) appear to be the most concerned with the wealth gap, with the latter experiencing a particularly sharp increase in the numbers of anxious respondents (+10 points). There seems to be no statistical backing for this somewhat dramatic shift in perception when it comes to the economic situation in Bosnia and Herzegovina.

As in previous years, Kosovo* has the fewest respondents who worry about rising inequality in their economy (68%) as well as the highest proportion of those who refused to provide an assessment when asked (17%).

After an alarming drop in 2018, employment numbers across the region have rebounded strongly with a cumulative seven-point hike over a period of just 12 months (from 34% in 2018 to 41% in 2019). Added to the 9% of self-employed respondents (+2 compared to 2018), a half of all survey participants are presently working. At the same time, the number of unemployed has dropped by two points across the region, with the proportion of housewives in the

**Figure 34: What is your current working status?[31]**
(All respondents - N=6020, share of total, %)


**Figure 35: If you are employed, is it a private or public sector employment?[32]**
(Employed - N=2441, share of total, %)




31 The figures might not add to 100% due to rounding.
32 The figures might not add to 100% due to rounding.

surveyed population falling by three points, and retirees by two.

All of the region's economies have added significant numbers to their employment ranks, with the exception of Montenegro; Albania has seen an incredible 18-point increase in overall employment since the last survey (up to 53% from 33% in 2018) with Serbia in second with 11-points. North Macedonia and Kosovo* have added 10 points each with Bosnia and Herzegovina increasing employment by eight points. Montenegro has added a single point since 2018.

These figures represent a dramatic and welcome departure from last year's Barometer when only two economies reported growth in employment, Montenegro (+1) and Serbia (+5). Albania, Kosovo* and Montenegro are now home to the largest unemployed populations in the region (all at 20%) while Bosnia and Herzegovina boasts the region's highest concentration of retirees (23%), overtaking Serbia, the region's oldest economy in 2018. At the other end, Kosovo* is once more home to region's youngest economy with 12% share of students in the survey population.

**Figure 36: How confident are you in keeping your job in the coming 12 months?**
(Employed or self-employed, N=2494, scale from 1 to 4, share of total, %)

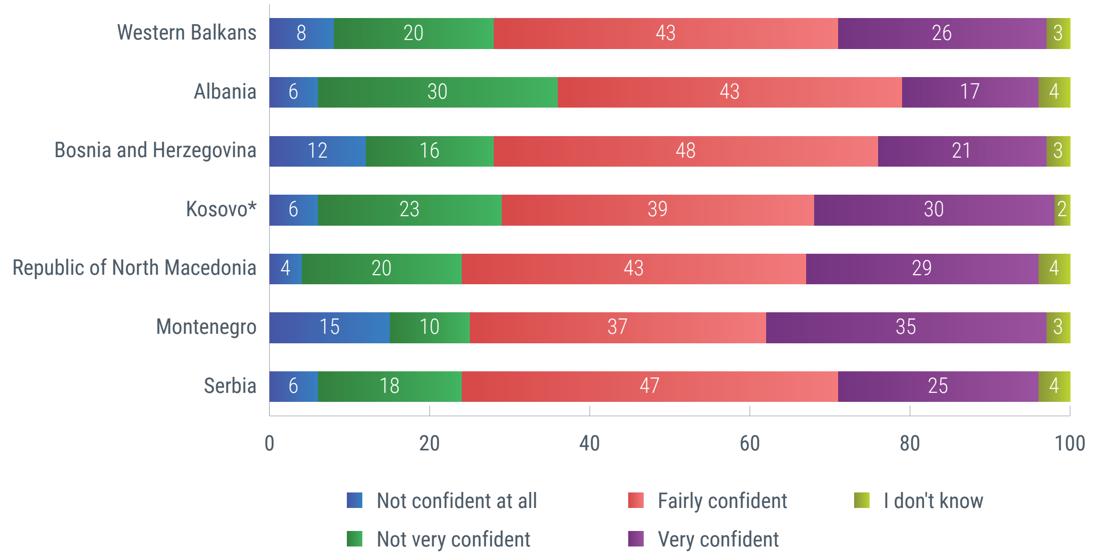
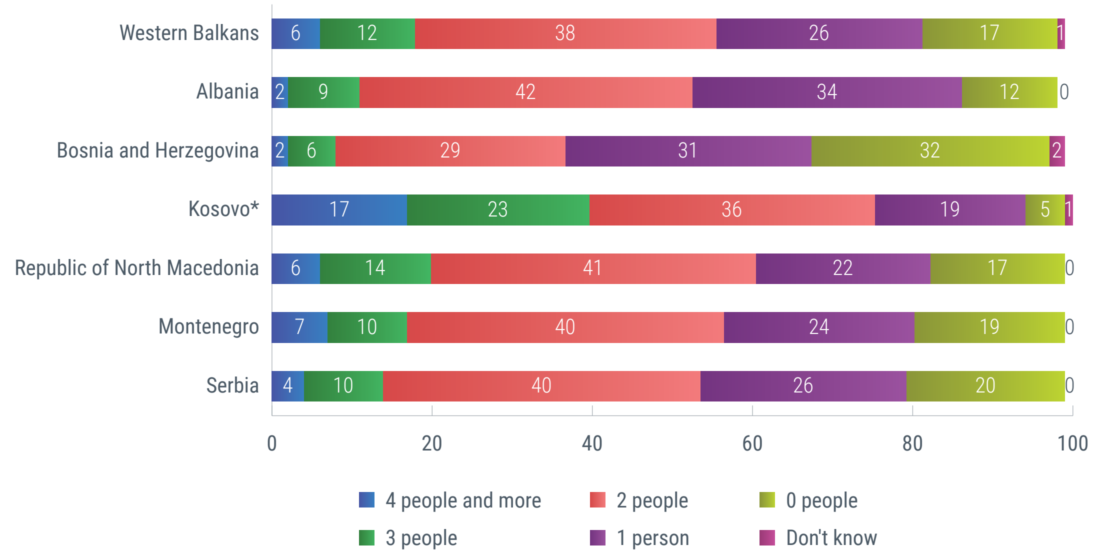



**Figure 37: How many people in your family, who are able to work, are employed?**[33]
(All respondents - N=6020, share of total, %)




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





Following last year's swing away from public employment, 2019 brings yet another trend reversal with a sizable surge in employment with government agencies, public institutions and publicly owned enterprises (+4 points compared to 2018). The share of public employees in the overall respondent population is again the highest in North Macedonia (38%) with Montenegro boasting the fewest public servants but still coming in at a quarter of the total population surveyed. Kosovo*, meanwhile, has seen the most marked redistribution of jobs between public and private sector employers with a 13-point hike in public sector employment at the expense of the private sector (up to 32% from 19% in 2018). Montenegro is the only regional economy to see an increase in private sector employment compared to the previous edition of the Barometer – this coming on the heels of a sizable spike in public employment there in 2018 (+7).

Following the shift towards traditionally safer public employment, job security has accordingly spiked across the region (+4). Tellingly, Kosovo* has recorded a 16-point spike since 2018 which can in part be explained by a corresponding surge in the number of public sector jobs reported by this economy over the past 12 months (+13 points – please see Figure 29).

With the exception of Albania (-5) and Montenegro (-4), all of the region's economies have reported improved job retention prospects.

Some 17% of all households surveyed report no members currently employed, down from 23% in 2018. At the same time, 64% of surveyed households report either one or two members presently working (+3 compared to 2018). The percentage of households with three or four members employed has surged once more and is now up to 18%, from 14% in 2018. Encouragingly, taken together all of these numbers hint at a considerably more positive outlook for the region's labour market.

At individual economy level, Kosovo* is presently home to fewest households with no working members (10%) while Bosnia and Herzegovina (30%) tops the economy rankings for households without a single member employed.

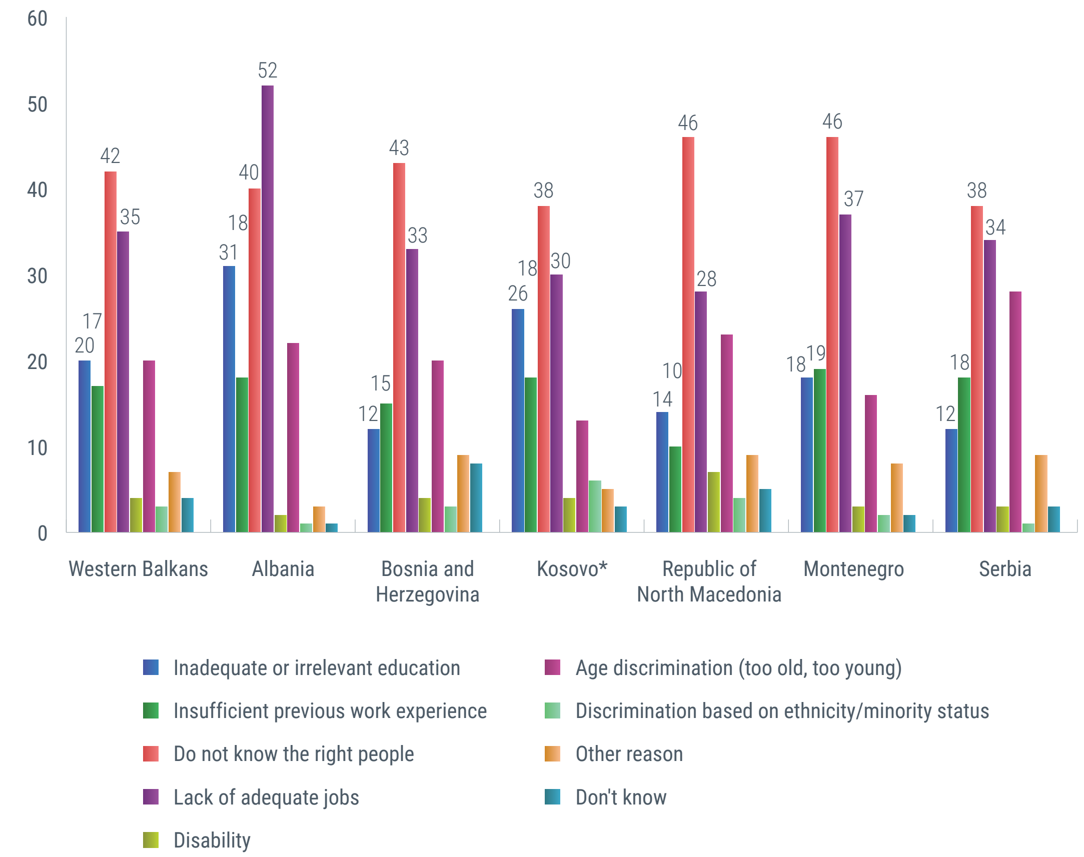
In terms of unemployment, the figures are even more striking compared to 2018; close to half of all households surveyed report no unemployed members (47%). This represents a major upturn when compared to the previous edition of the Barometer where the percentage of households with no members unemployed was closer to a third of the surveyed population (35%). 28% have one household member unemployed while fewer than a quarter have two or more (24%).

Serbia is the region's runaway leader in the number of households with no unemployed members (62%), with Kosovo* at the other end of the scale (28%). As has become custom, Kosovo* is featured prominently in both employment and unemployment figures, due to the larger average size of household in this economy.

**Figure 38: How many people in your family, who are able to work, are unemployed?**[34]
(All respondents - N=6020, share of total, %)


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

**Figure 39: What are the two main obstacles to those in your household who do not work?**
(Households with at least one unemployed person - N=3111, top two answers, %)




The two leading obstacles to employment cited in 2018 continue to top the rankings, albeit in reverse order; not knowing the right people is now top, up to 42% from 29% in the previous edition of the Barometer. A shortage of adequate jobs is now second with roughly a third of respondents citing this as the chief obstacle to gainful employment (35%). The perceived levels of nepotism in hiring are a major cause for concern and indicate that trust in employers, whether private or public, is at a low and must be addressed in a structural manner by the region's economies.

Inadequate or irrelevant education is cited by a fifth of all respondents as a barrier to employment with 17% feeling that their lack of relevant experience is preventing them from securing jobs.

Perceived age discrimination has surged as a concern within the population surveyed as a fifth of all respondents cite it as an obstacle, up from 12% in 2018.

More than half of all respondents from Albania complain about a shortage of adequate jobs (52%), well above the regional average, while North Macedonia and Montenegro tend to be most concerned about nepotism in hiring (both at 46%). More than a quarter of the population in Serbia cite age as a barrier (28%), likely hinting at an aging population. Concerns over education are especially prevalent in Albania where nearly a third of all respondents feel that the education system has not adequately prepared them for the workplace (31%). At the same time, concerns over education are least prominent in Bosnia and Herzegovina and Serbia, both at 12%.

The rate of job losses reported by survey participants is now holding steady for a third year running at 11%. At the same time, however, the survey records a major surge in the ranks of respondents not presently working, up to 26% from 12% in 2018. Viewed alongside overwhelmingly positive employment data from other parts of this section, the figure represents something of an outlier and may be, at least partially, linked to the exceptionally high number of Kosovo* respondents who report not working at present (41%).

Albania and North Macedonia are again joint top of the unhappy rankings when it comes to job losses with both economies at 14% (-2% compared to 2018).

Kosovo* is now reporting fewest layoffs in the region with just 8%, down from 11% in 2018 and, impressively, from 19% in 2017. This represents a cumulative drop of 11% in firings over a period of just two years; concerns remain, however, over an extraordinarily high number of unemployed respondents, as noted above.

Bosnia and Herzegovina has, proportionally, seen the largest hike in layoffs compared to 2018 with a five-point increase (now at 11%).

When it comes to job losses witnessed in the respondents' immediate environment, the number of survey participants reporting layoffs of friends and relatives has surged by six points (37% from 31% in 2018) while the number of co-workers laid off has increased by three points (27% from 24% in 2018). There is clearly much instability left in the region's labour market as the 2018 Barometer reported substantial decreases in the number of rel-

**Figure 40: Did any of the following situations happen to you in the past three years? A - Someone from your family, a relative, or a friend lost their job?; B - One of your colleagues has lost their job?; C- You lost your job?**[35]
(All respondents – N=6020, share of total, %)

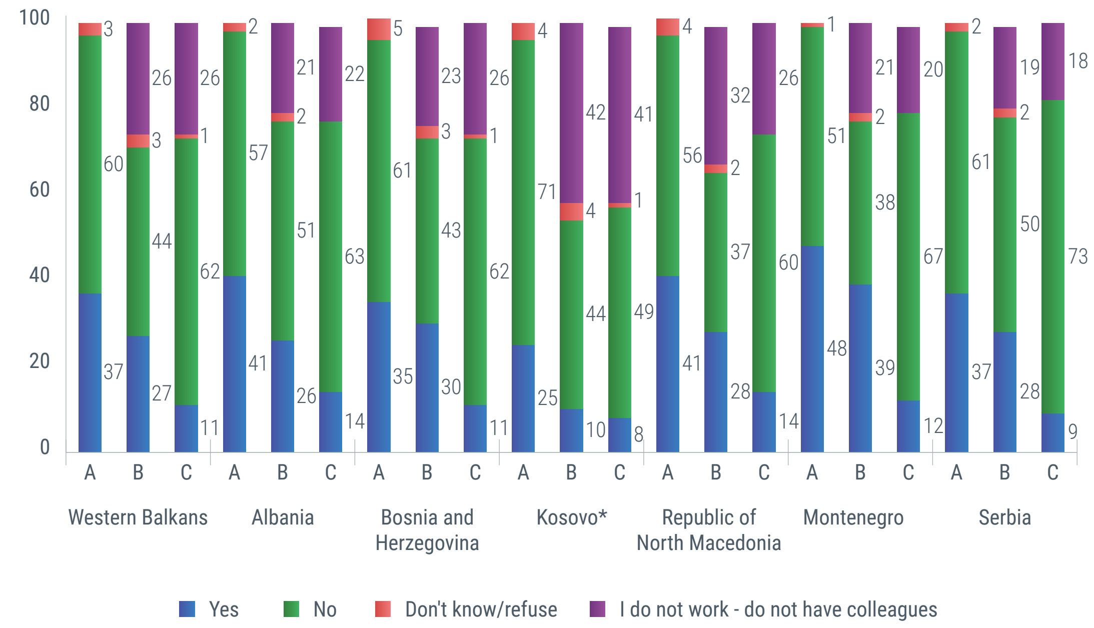
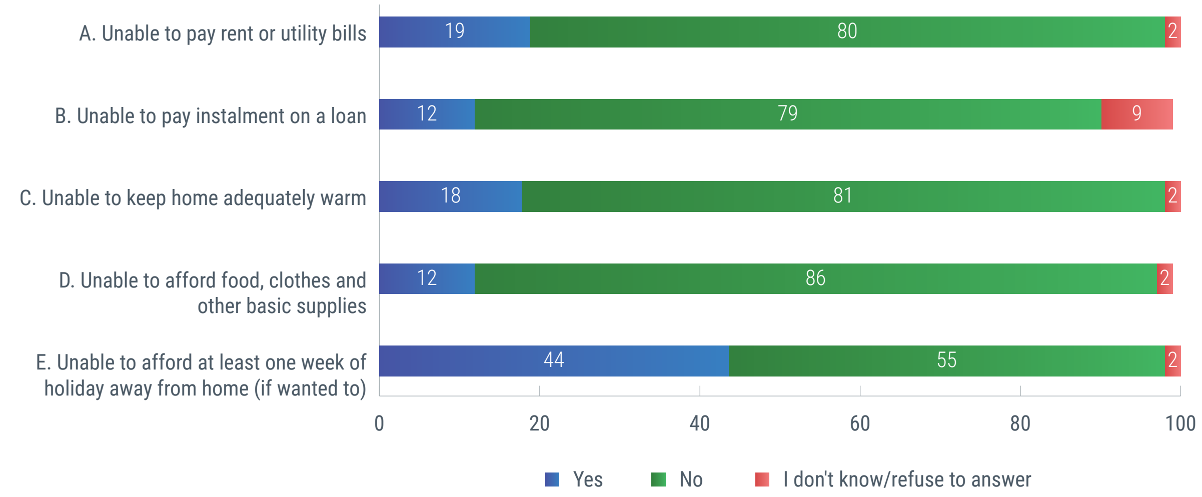



**Figure 41: Did your household face the following problems (even at least once) during the past 12 months? *(Western Balkans)***[36]
(All respondents - N=6020, share of total, %)




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

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

atives and colleagues fired, eight and four points respectively.

As in previous years, the one thing most respondents were unable to afford in 2019 was a holiday away from home (44%, down from 46% in 2018). Rent or utilities came in second as the expense item respondents struggled with making the most (19%) while heating came in close third with 18%.

Encouragingly, the number of respondents unable to afford food supplies has fallen by four points (down to 12% from 16% in 2018) with those that missed loan payments also making up 12% of the surveyed population (down from 14% in 2018).

Looking at the six regional economies, Albania is home to the highest proportion of respondents struggling across all five categories surveyed. As last year, close to two thirds of survey participants were unable to afford a holiday away from home while close to half (42%) could not keep their homes warm.

Conversely, the financial muscle of households from Bosnia and Herzegovina again outscores their neighbours with survey participants from this economy least likely to experience financial difficulties. In fact, for four out of five categories, only 10% or fewer respondents have experienced any of the financial difficulties on offer over the past 12 months.

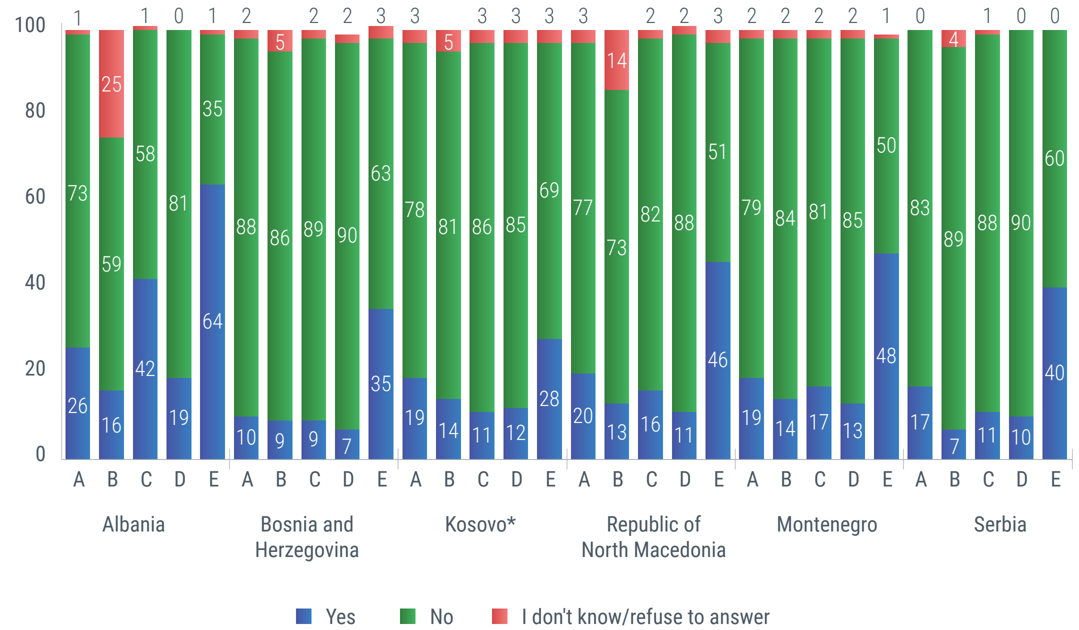
The trend of growth in volume of remittance payments across the region continued into 2019, with nearly a quarter of all respondents surveyed reporting receiving assistance from abroad (24%, up from 18% in 2018). After a period of depressed remittance payments, rising outward economic migration across the region is expected to inflate these figures further in coming years.

In terms of noteworthy developments, Kosovo* has recorded a substantial hike in remittance receipts with nearly half the population (45%) benefiting from assistance provided by persons living abroad, up from just 30% in 2018. Kosovo* has previously witnessed large oscillations in the volume of remittances with share of out-of-country payments going down to as low as 28% in 2016 and then as high as 47% in 2017. As Kosovo*, Bosnia and Herzegovina has witnessed a significant spike in remittance payments with the influx of assistance from abroad doubling since 2018 when this economy reported fewest remittances received in the region (from 9% in 2018 to 18% in 2019). Meanwhile, the rates of remittance payments for Albania remain stable since 2018 (33%).

Every 10th resident of the region feels looked down upon as a result of their employment status and/or income level. While still high, this number does represent an improvement compared to 2018 when

**Figure 42: Did your household face the following problems (even at least once) during the past 12 months? (By economies): A - Unable to pay rent or utility bills; B - Unable to pay instalment on a loan; C - Unable to keep home adequately warm; D - Unable to afford food, clothes and other basic supplies; E - Unable to afford at least one week of holiday away from home (if wanted to)[37]**

(All respondents - N=6020, share of total, %)




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

**Figure 43: Did your household receive help, at least once in the past 12 months, in the form of money or goods from another individual living abroad?[38]**

(All respondents - N=6020, share of total, %)

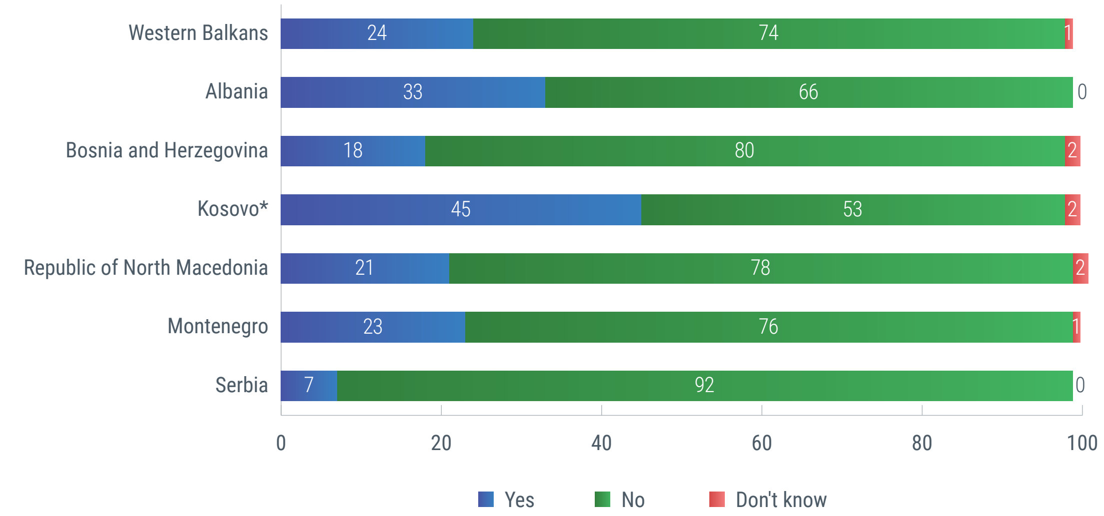
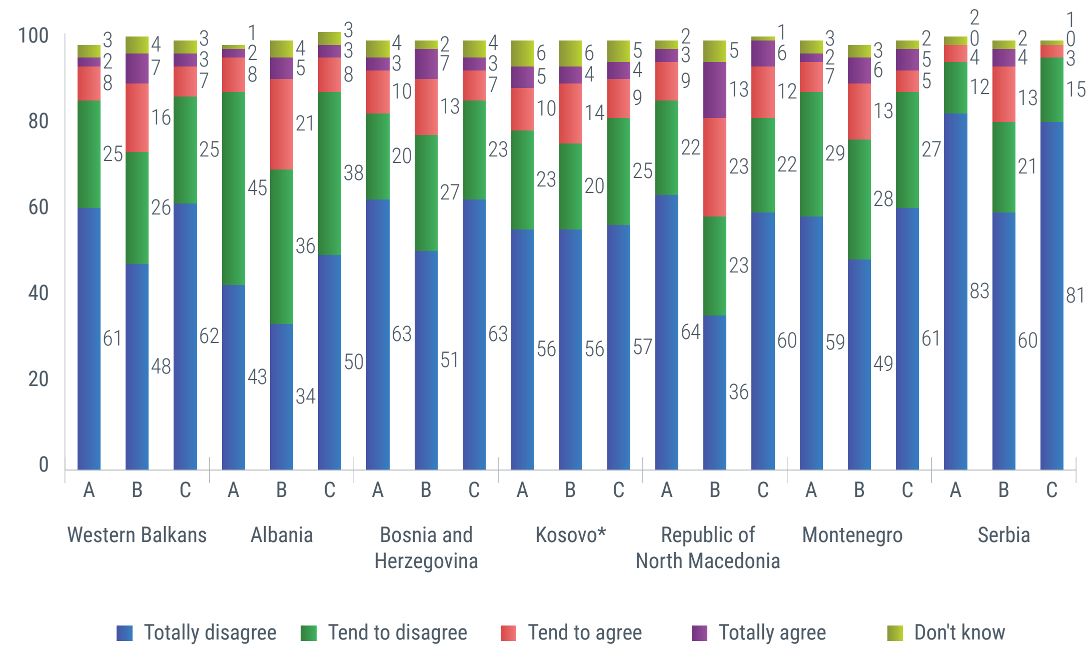



**Figure 44: To what extent do you agree with the following statements: A - Some people look down on you because of your income or job situation; B - I feel that there is a risk for me that I could fall into poverty; C - I feel left out of society.[39]**

(All respondents - N=6020, scale from 1 to 4, share of total, %)




14% of respondents reported such sentiments. Overall, there has been a cumulative seven-point drop along this respondent category from 2014. Looking at the individual economies, Kosovo* is home to the highest proportion of respondents who feel undervalued as a result of their job or financial situation (15% down from 19% in 2018) with Serbia at the other end of the scale with just 4% (-6 from 2018).

Less than a quarter of the Western Balkans' population are anxious about falling below the poverty line (23%), a substantial 9-point drop in just 12 months (31% in 2018) and a positive marker for the economic health of the region. Albania, previously the economy with by far the highest proportion of individuals at risk (45% in 2018), now reports an upturn in economic status with just over a quarter perceived as potentially on the brink of poverty (26%). After

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

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

recording a slight increase in the number of at-risk respondents (36% from 35% in 2018), North Macedonia now leads the region in this survey category with the continued economic vulnerability of a large segment of its population being a cause for alarm.

A tenth of the population surveyed feel left out of society with exclusion felt particularly keenly in Kosovo* (13%), albeit to a much lesser extent than previously (21% in 2018). Overall, respondents have tended to feel more included across all of the region's economies with Serbia the leader in this regard with only 4% reporting a sense of societal exclusion.

For those who feel excluded, the chief culprit cited by respondents is the inability to secure gainful employment, with 42% noting a lack of job opportunities, just ahead of belonging to an overlooked age group (29%).

Last year's second ranked cause of exclusion, membership in a minority group, has decreased in prominence in 2019, and is now forth most common reason cited for feelings of exclusion (down to 16% from 25% in 2018). Should this trend continue into next year and beyond, this may be viewed as a positive harbinger of greater social acceptance of minority communities and groups.

Meanwhile, more than a quarter of the region's population (27%) complain of receiving little or no support from family or friends, indicating a growing breakdown in informal social support networks.

Viewed by economy, Montenegro has witnessed a remarkable turnaround with more than half of the excluded population attributing the sentiment to their inability to secure employment; this is an incredible 39 percentage point surge on last year when the economy had fewest respondents in this category (19%). This striking statistic finds some corroboration in the higher than average rate of job losses witnessed in Montenegro over the past 12 months (see figure 34 above).

The number of excluded individuals who cite their age a barrier to inclusion is again the highest in Serbia, with almost half of the surveyed sub-population affected (47%). This is a substantial seven-point increase on last year and a further indicator of demographic changes in this economy. Kosovo*, at the other end of the scale, has fewest such respondents (13%).

At the same time, Kosovo* is home to the largest proportion of respondents who feel excluded as a result of receiving little or no support from friends and familial social networks (37%), as well as those who cite membership in a minority group or community as the chief cause of their exclusion (39%). This edition of the Barometer records a sizable decrease in the number of respondents without a stated preference regarding the gender of their supervisor (63% from 68% in 2018). Interestingly, the five-point difference is divided almost equally between those who prefer male (+3) and those that favour female (+2) line managers.

Respondents who prefer male supervisors are still ahead in regional rankings (21% versus 16% for female managers), with a single point increase in their favour since 2018. After some indication that the gender gap was narrowing in 2018, it appears to be growing once more, albeit at minimal pace.

Montenegro and Serbia lead the region in neutral respondents (with 74% and 69%, respectively) with Kosovo* in distant last with 52% of neutral respondents. Interestingly, Kosovo* is also the only economy in the region where respondents who favour female managers outnumber those who prefer male supervisors (26% to 22%). The biggest margin between respondents who prefer male versus female

**Figure 45: You feel left out because you:**
(Left out - N=633, multiple answers, %)

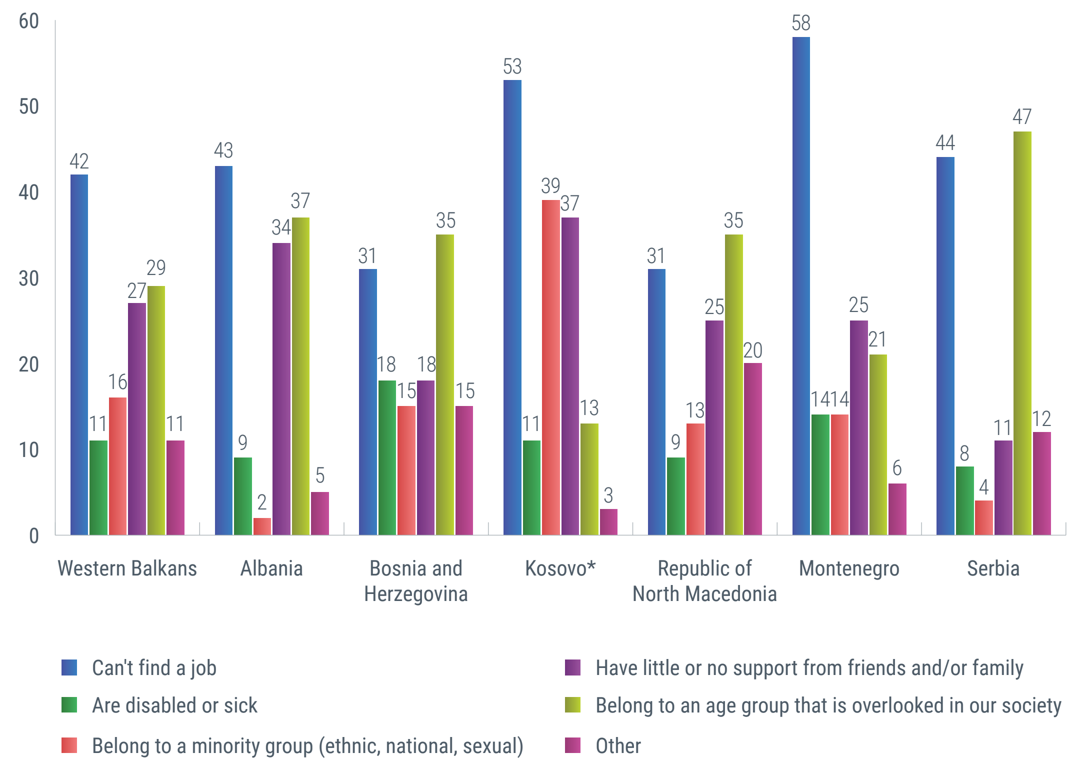



**Figure 46: Do you prefer to have a female or male boss at work?**[40]
(All respondents - N=6020, share of total, %)

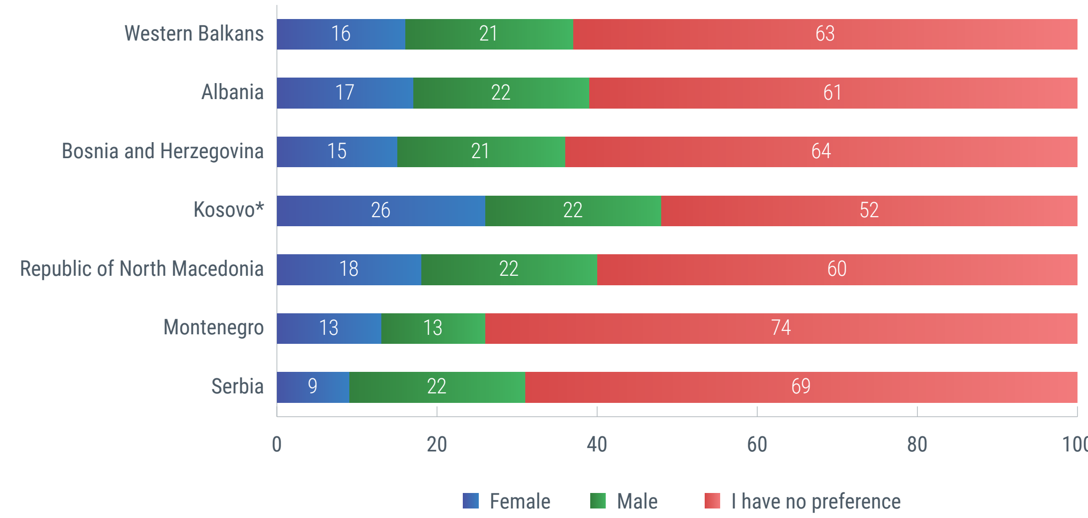
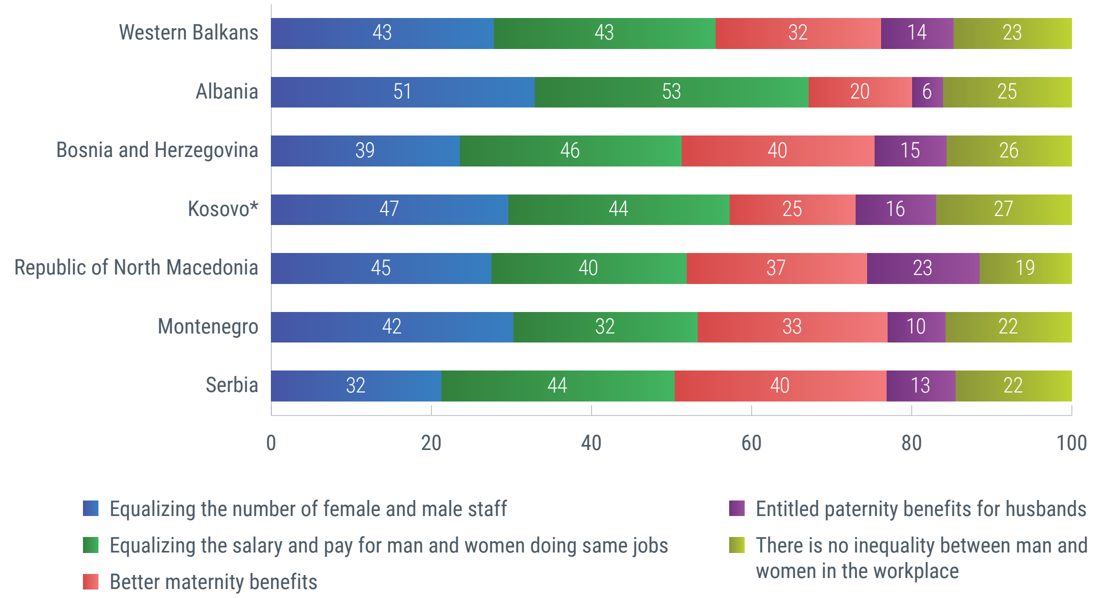



**Figure 47: Gender equality at work can be improved by:**[41]
(All respondents - N=6020, multiple answers, %)




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

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

managers is found in Serbia with 22% and 9%, respectively.

Close to a quarter of the respondent population deny the existence of a gender gap (23%), a slight increase from 2018.

Out of those who acknowledge the disparity between the genders, ensuring equality in salary and enforcing hiring quotas for female and male staff (both at 43%) are again the two mitigation measures most commonly cited by respondents. Better maternity benefits also feature prominently, with nearly a third of all respondents supportive of this strategy (32%), a four-point increase on 2018. Support for better paternity benefits, meanwhile, is holding at 14% for the third year running.

More than half of all respondents in Albania support equal pay as the preferred gender gap-bridging strategy (53%), with hiring quotas in close second (51%) – Albania leads the region across both these categories. At the same time, respondents from Albania are least likely to support better paternity benefits for new fathers (6%). Conversely, North Macedonia, with 24%, is the region's most forceful advocate of better paternity benefits.

Respondents from Bosnia and Herzegovina and Serbia support improvements in maternity benefits to an extent unmatched by the region's other economies (both at 40%). Meanwhile, more than a quarter of all respondents (27%) in Kosovo* feel that there is no gender gap in their society.





# EMPLOYABILITY AND THE LABOUR MARKET

Who you know rather than what you know is once again seen as a key prerequisite for getting a job by the majority of respondents in the region. Putting an emphasis on merit-based considerations in hiring should remain a priority for the governments in the region to make the labour markets fairer and more efficient. With high numbers of long-term unemployed, and many rendered de facto inactive by virtue of their long-held joblessness, confidence in the job market needs to be rebuilt in order to mobilise this large but dormant contingent of prospective job seekers. This is set to become increasingly important for economies already experiencing labour pool depletion as a result of large outward migration.

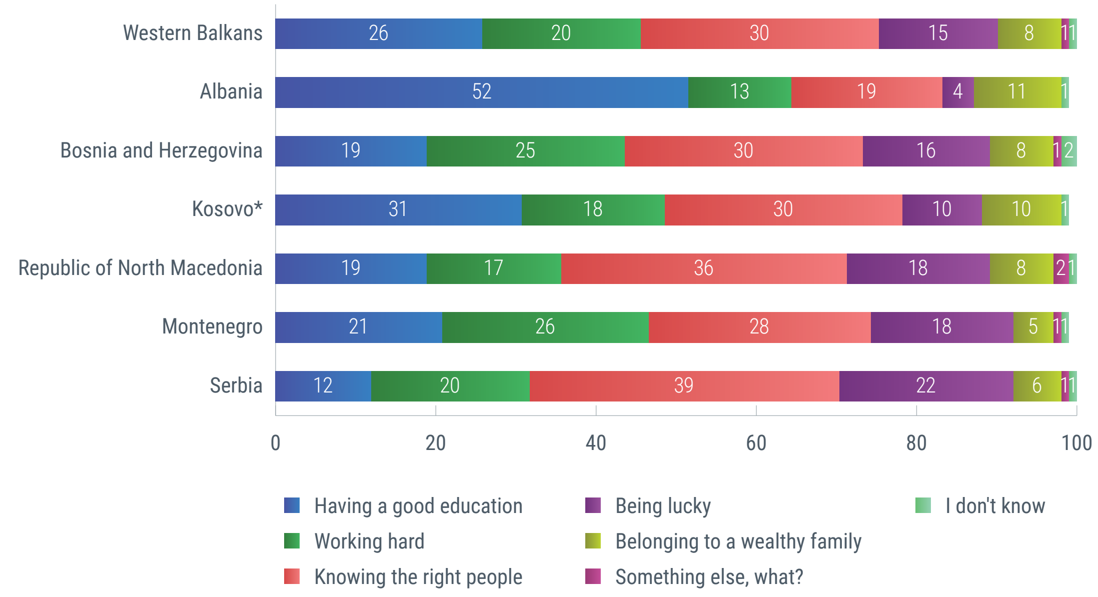
Concerningly, fewer than two-thirds of the region's graduates secured employment within three years of leaving school while only a quarter were employed in the first 12 months following graduation. 11% looked for a job for longer than five years while a full fifth were never able to secure one. These numbers paint a sobering picture of the labour market in the region with long-term unemployment especially prevalent in North Macedonia where nearly a quarter of all respondents spent more than five years looking for a job, and Kosovo* where more than a third are still looking.

Public sector employers are still the more attractive proposition but to a much lesser extent with the ranks of indiscriminate job seekers growing substantially.

Meanwhile, more than a quarter of all respondents in the region feel underprepared and underserved by the education systems in their economies; this is an urgent call to action by the governments to engage in reform-minded dialogue with both educators and employers. Foreign languages and digital skills are once more the two topical areas where most employers expect to see their workers improve.

Knowing the right people is considered critical for getting ahead in life by close to a third of all respondents (30%). Having a good education is most important for just over a quarter of all individuals surveyed (26%) while working hard has been touted as vital to success by merely a fifth of all survey participants. These numbers suggest that there has been a partial and somewhat worrying reordering in the perceptions of what the key prerequisites for success are. The number of respondents prioritising connections has grown by four points while survey participants who feel that working hard will get them furthest has fallen by seven points in the space of a

Figure 48: What do you think is the most important for getting ahead in life?[42]
(All respondents - N=6020, share of total, %)




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

*Table 6: What do you think is the most important for getting ahead in life? – Comparison 2014-2019*

*(Share of total, %)*

| | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 |
|---|---|---|---|---|---|---|
| Working hard | 25 | 26 | 25 | 26 | 27 | 20 |
| Having a good education | 24 | 22 | 19 | 21 | 23 | 26 |
| Knowing the right people | 22 | 27 | 32 | 29 | 26 | 30 |

year (down to 20% from 27% in 2018). At the same time, and in more positive news, the estimation of a good education as a prerequisite for success has gone up by three points (26% from 23% in 2018).

Albania, last year's champion of working hard (41% in 2018) is this edition's leading advocate of learning with more than half of the population surveyed espousing the necessity of a good education (52%). Montenegro (26%) and Bosnia and Herzegovina (25%) value hard work above all else while respondents from Serbia are most likely to ascribe success to knowing the right people (39%); interestingly, Serbia is also home the largest group of respondents who subscribe to the belief that good fortune is essential to succeed in life (22%).

Job seekers continue to be best served by personal contacts, according to most responders (41%). Family and friends in high places, meanwhile, are singled out as a key contributing factor in securing employment by more than a third of all survey participants (up to 35% from 33% in 2018 and 29% in 2017).

After a rather dramatic decline in 2018 (-10), job qualifications and education have rebounded strongly and are once more cited as one of the two key factors by more than a third of all survey participants (36%). Professional experience is important for a fifth of all respondents, the same as in 2018.

Interestingly, the ability to adapt continues to feature more prominently with each new edition of the Barometer and is now closing in on professional experience (18%).

While the importance of qualifications and education has been reinforced somewhat with the latest figures, the fact remains that relationships rather than merit determine a job seeker's prospects on

**Figure 49: In your opinion, which two assets are most important for finding a job today?**
(All respondents - N=6020, maximum two answers, %)

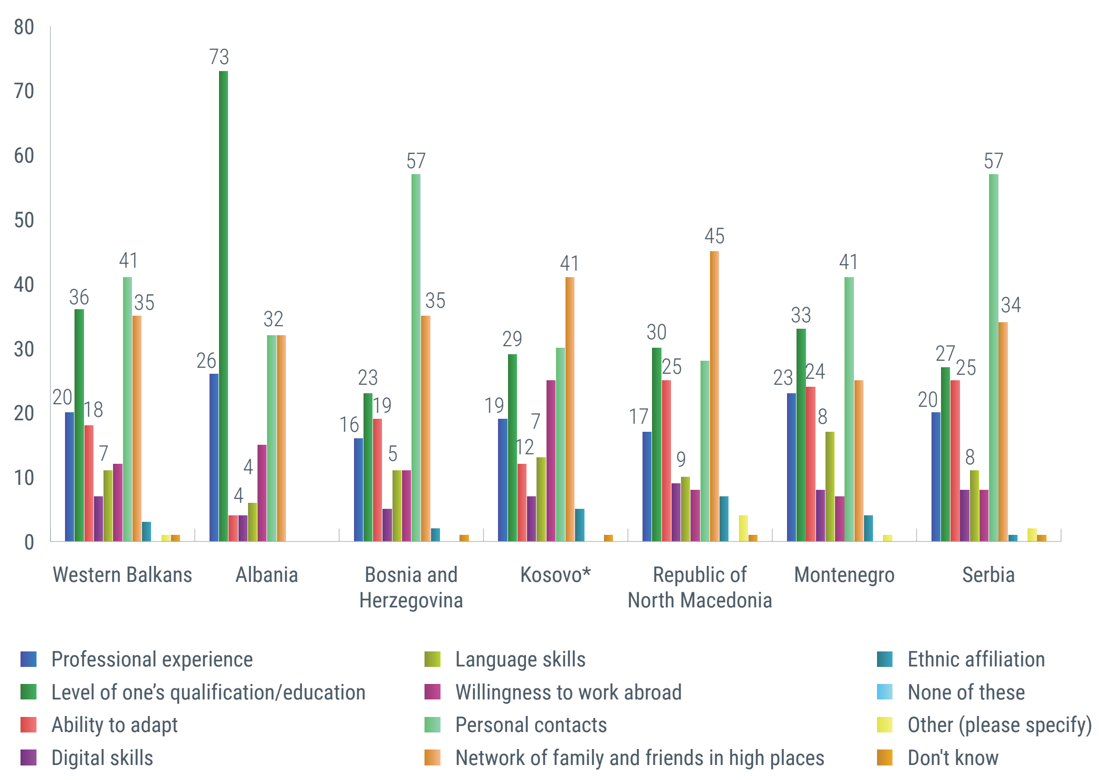
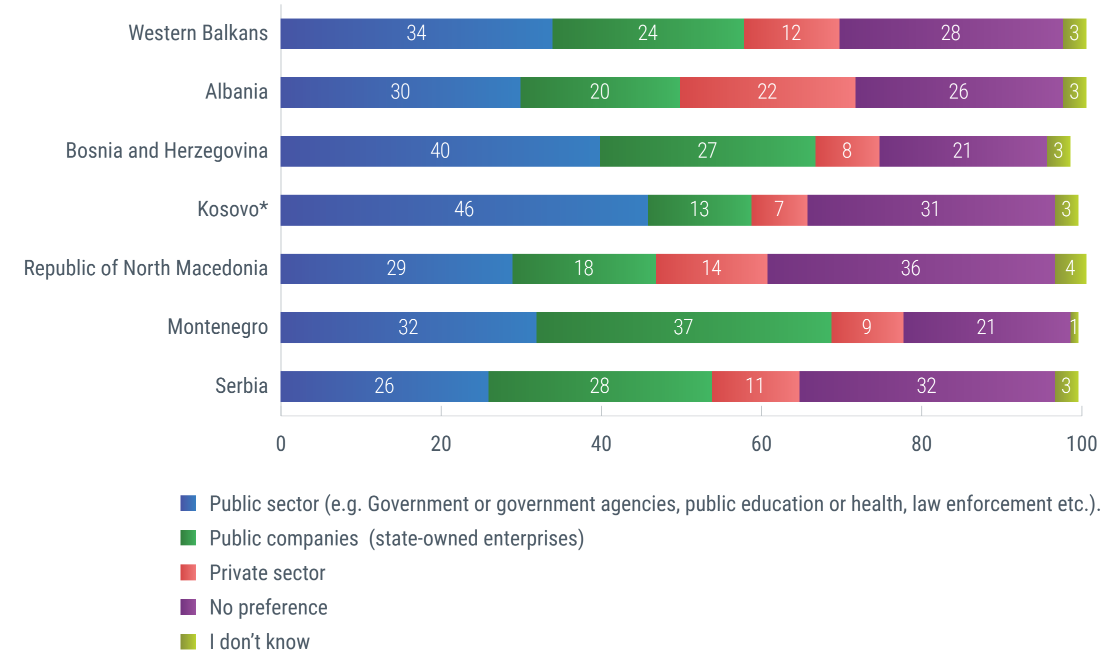







**Figure 50: If you could choose, would you prefer to work in the public (public administration and public companies) or private sector?[43]**
(All respondents - N=6020, share of total, %)




the labour market. As expected, willingness to work abroad continues to garner endorsement from responders with membership in this category now at 12%, an eight-point surge over a period of two years (4% in 2017).

Encouragingly for Albania, job qualifications are by far the most important consideration for job seekers in this economy (73%) while personal contacts dominate survey results in Serbia and Bosnia and Herzegovina to an even greater degree than in 2018 (57% for both and up by six points from 2018).

The public sector remains the most desirable employer for an overwhelming majority of survey respondents, although to a much lesser degree than last year. Between jobs in government and those on offer in public companies there has been a significant drop in interest by prospective employees from across the region, down to 58% from 73% in 2018.

Interestingly, there has been no corresponding surge in interest in private sector employment (down to 12% from 13% in 2018), with the category of respondents expressing no preference now the second largest (28%). Respondents from Montenegro (69%) and Bosnia and Herzegovina (67%) continue to favour public sector employment to a large degree with Albania, as was the case last year, home to the largest number of respondents who say they prefer employment in the private sector (22%). Meanwhile, North Macedonia boasts the highest proportion of neutral respondents with just over a third (36) expressing no preference for either public or private sector employment. Kosovo* has recorded the biggest drop in interest when it comes to public sector jobs with just 59% favouring work in government compared to 84% in 2018.

While this section indicates that governments remain the region's favoured employer, the growing ranks of neutral respondents show that prospective job seekers are increasingly open to pursuing employment opportunities wherever they may arise in what is a positive development for the region's labour market.

Job security is once more the prevalent factor behind the popularity of public sector jobs as nearly half of all respondents who favour working in, or for, government cite it as the main reason (48% and +3 compared to 2018). This is followed by superior working conditions (38%), and higher salaries (28%). Interestingly, better remuneration has seen a significant drop in interest over the past several editions of the Barometer, falling by 12% since 2017. This may be a contributing factor to the decrease in interest when it comes to public sector employment, a positive omen for the health of the region's labour market.

Close to a fifth of all respondents feel that the public sector offers better access to social care and health services as well as superior pensions (19% for both).

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

**Figure 51: If you prefer to work in public sector, what is the main reason for that?**
(Those who prefer working in public sector N=3480, maximum two answers, %)

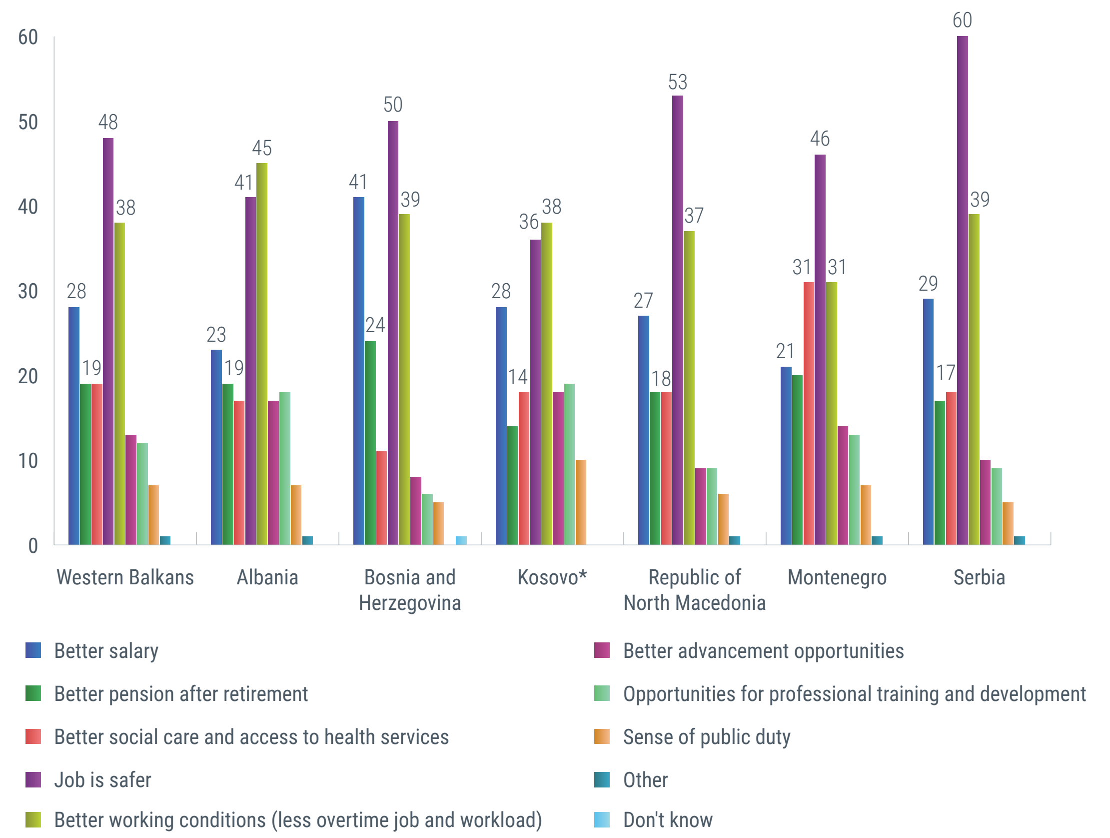
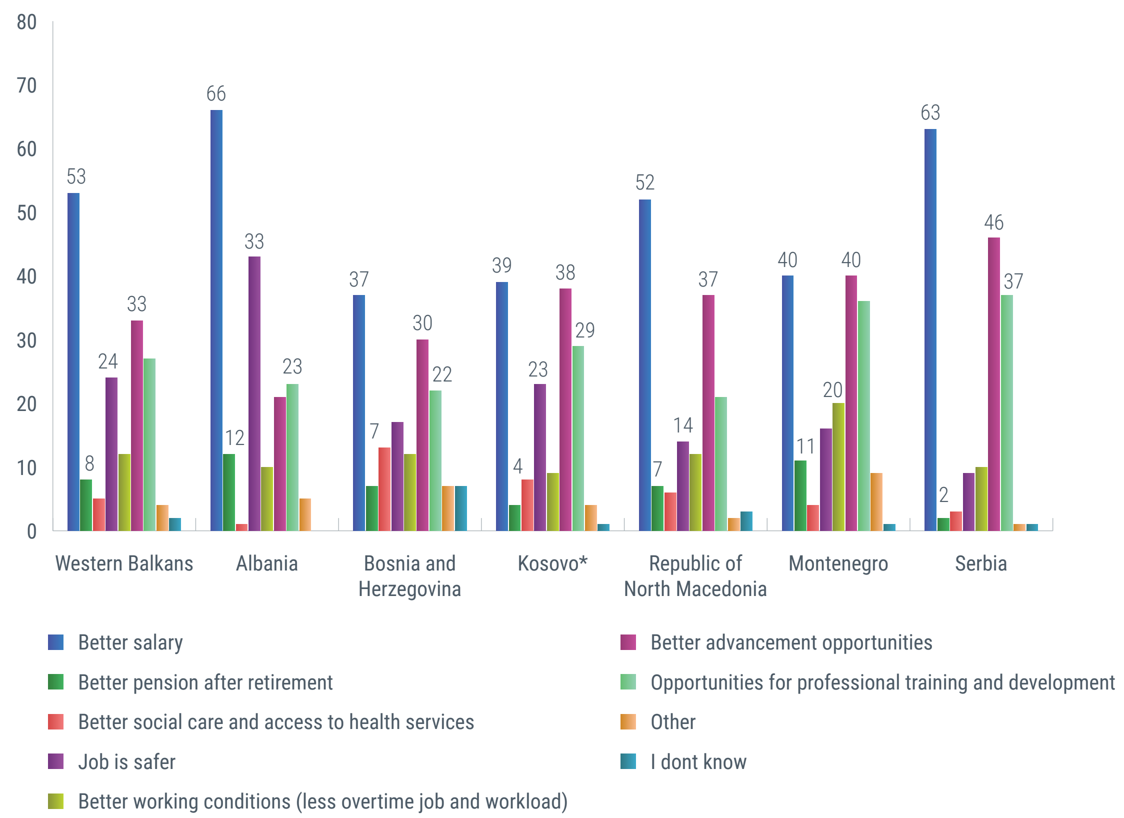



**Figure 52: If you prefer to work in private sector, what is the main reason for that?**
(Those who prefer working in private sector, maximum two answers, %)








Once again, respondents in Serbia value job security most out of all the region's survey participants (60%, up from 52% in 2018). Better salaries are the critical consideration for respondents from Bosnia and Herzegovina with 41%, indicative of significant distortions in the labour market. Meanwhile, better working conditions are prioritised by respondents from Albania (45%) while in Kosovo* nearly a fifth of respondents highlight better professional development opportunities on offer by public employers (19%).

A fifth of all respondents in Montenegro feel that pensions earned in the public sector are superior to those offered by private sector employers. Meanwhile, a sense of public duty compels every tenth respondent from Kosovo* to seek employment in government.

Figure 52: Respondents who prefer to work in the private sector overwhelmingly do so for reasons of superior remuneration and, to a lesser degree, better working conditions. More and better opportunities for professional development are gaining in prominence here as well with more than a quarter of respondents primarily interested in professional growth on offer (27%).

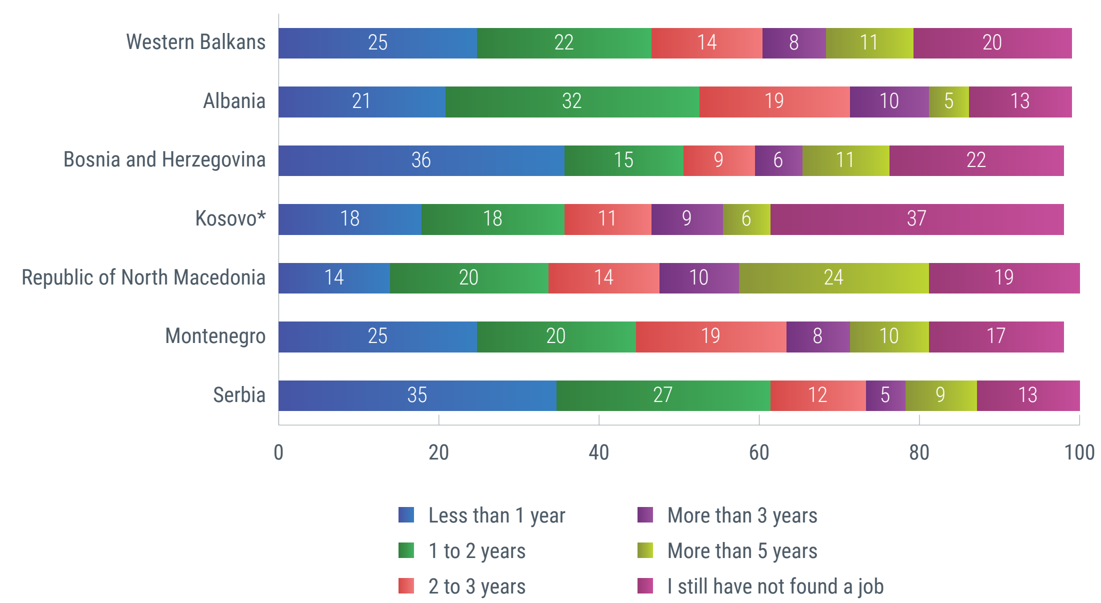
Albania and Serbia lead the field when it comes to respondents favouring superior remuneration with 66% and 63%, respectively. Albania is also home to the largest group of respondents who feel that private sector jobs will offer them better access, and quality, of social and healthcare services while Serbia has the most respondents who feel that the private sector offers better working conditions.

Some 61% of graduates in the region were able to secure employment within three years of leaving school while only a quarter were employed in the first 12 months following graduation. 11% looked for a job for longer than five years while a full fifth were never able to secure one. These numbers paint a sobering picture of the labour market in the region with long-term unemployment especially prevalent in North Macedonia where nearly a quarter of all respondents spent more than five years looking for a job, and Kosovo* where more than a third are still looking (37%). Meanwhile, Bosnia and Herzegovina is the regional leader in the number of graduates who were able to get jobs immediately after graduation (36%), with Serbia in close second (35%).

For comparison, the 2018 employment rates for EU graduates over the past three years are 83.4% for tertiary education, and 65.8% for upper secondary general education.[45]

While foreign-owned companies remain the preferred private sector employer (26%), domestic employers have closed the gap to just three points from 13 over the past 12 months (23%). More than half of the respondent population, meanwhile, don't have a clearly stated preference, a ten-point increase on last year.

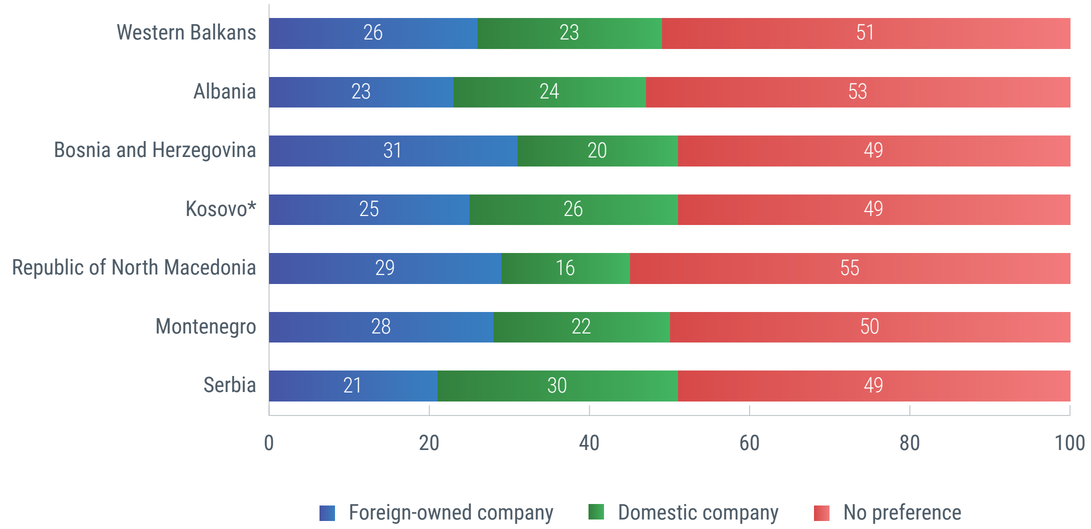
**Figure 53: How long it took you between finishing your education and getting the first job?[44]**
(All respondents, N=6020, share of total, %)




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

45 EurpstatEurostat: Employment rates of recent graduates https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Employment_rates_of_recent_graduates&oldid=440908

**Figure 54: Would you rather work for a...?[46]**
(All respondents, N=6020, share of total, %)




Serbia, Kosovo*, and Albania show a bias towards domestic companies while Montenegro, Bosnia and Herzegovina and North Macedonia largely favour foreign employers. At the same time, North Macedonia has the highest proportion of neutral respondents (55%).

There is some cause for encouragement when the prevailing trends in the region's labour market are surveyed. The strong bias towards public sector employment, while still evident, is less pronounced than in previous years. Judging by the results of the survey, there has been some movement towards an equalisation in salary and at least some benefits between the two sectors. This can in part be attributed to rising private sector salaries across much of the region with businesses responding to high turnover largely caused by outward migration of skilled labour. The demand for public servants is unlikely to be as prevalent as to push government employers into similar action.

The entry of young people into the labour market, however, needs to be better enabled and facilitated with youth unemployment still high across much of the region. Employment rates of recent graduates, from both secondary and tertiary education are well below the European average with a large segment of the population now effectively unemployable after spending more than five years looking for a job.

Employment policies must be redesigned to incentivise young graduates to secure private sector jobs while relevant enforcement agencies must ensure that working conditions are respected, and benefits are provided, by all, private or public employers. Education systems must engage in a structured dialogue with employers, with dual education and on-the-job training essential to meet the needs of rapidly evolving industries. As in previous years, spending on active labour policies remains relatively low but also lacking in strategic focus with entrepreneurship and innovation an afterthought for most.

Employment and Social Affairs Platform, an EU-funded project implemented by RCC, has been providing demand-driven support to the WB administrations in developing more effective employment and social policies through regular in-depth analysis of employment and active labour market policies (ALMP), peer learning modelled after the EU Member States mutual learning exercises, and introducing bench-learning modelled after the EU Public Employment Services network practices.

The skills acquired through formal education are adequate for their present job, claim a majority of respondents (59%) with some 28% disagreeing. There is no major change noted in comparison to survey data from 2018.

Respondents from Kosovo* are least likely to be satisfied with the relevance of their education to the requirements of their workplace with just under a half happy with their education system (48%). Meanwhile, respondents from North Macedonia are overwhelmingly satisfied with how their education system prepared them for the labour market (67%). This economy is also the only in the region with a dissatisfaction rate of under 25% (19%).

The fact that more than a quarter of respondents in the region feel underprepared and underserved by the education systems in their economies is an urgent call to action by the governments to engage in dialogue with both educators and employers.

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





**Figure 55: Would you agree that the skills you learned in the education system meet the needs of your job?[47]**
(All respondents - N=6020, scale from 1 to 4, share of total, %)[48]

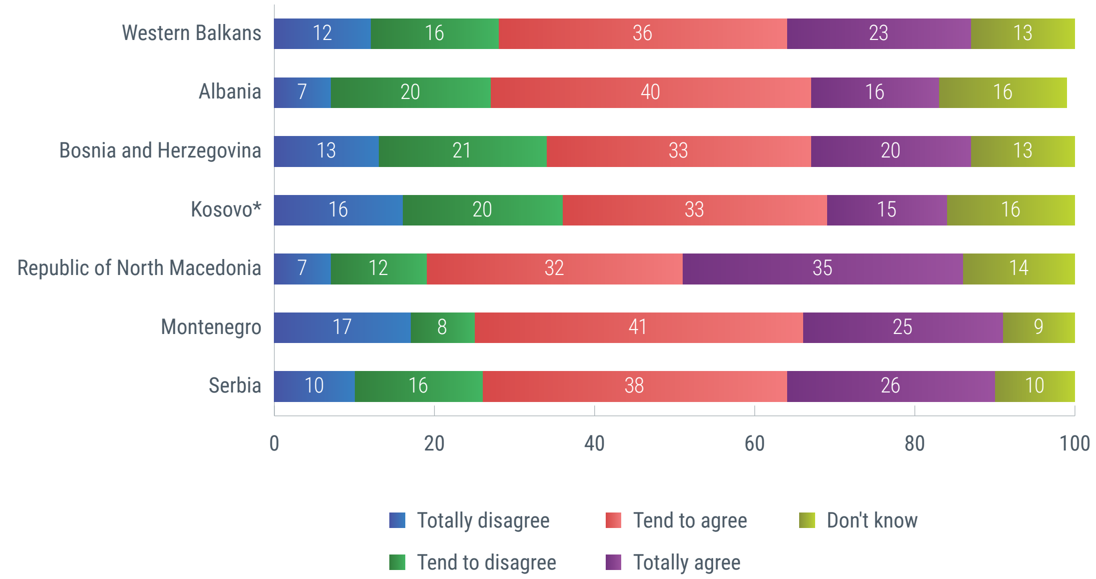
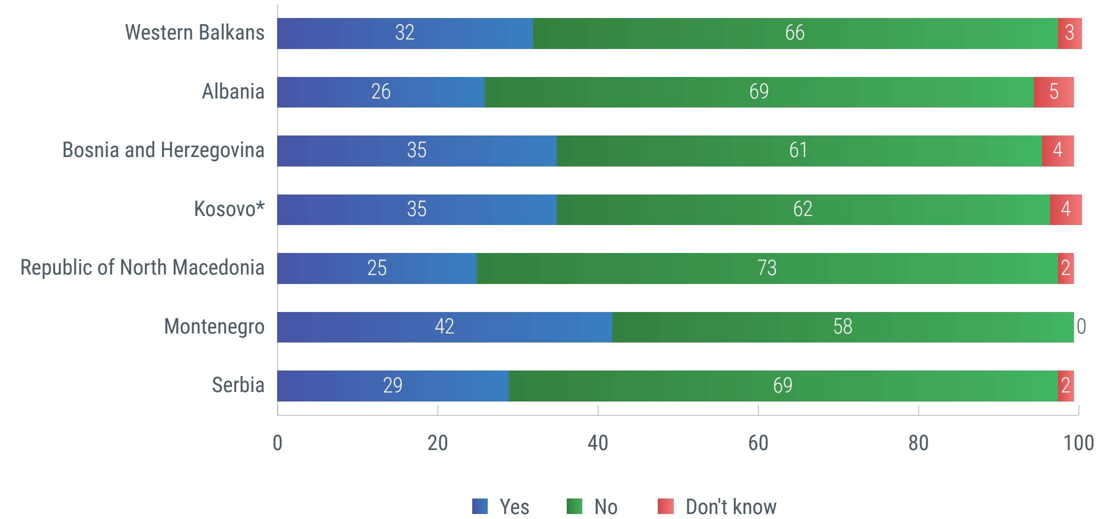



**Figure 56: Has your job required you to learn new or advance your skills in the past 12 months?[49]**
(Employed or self-employed - N=2997, share of total, %)




Some two-thirds of survey respondents were not asked to learn new, or advance existing, skills. The need to upskill as a job requirement was most prevalent in Montenegro where some 42% were asked to develop job competencies through training. At the same time, only 25% of workers from North Macedonia were instructed to undertake job-related training, representing a regional low.

Foreign languages (34%) and digital skills (32%) were two of the most likely areas of improvement mandated by employers in 2019. Understanding how to effectively manage own learning to keep up with their jobs was the third competence targeted for upgrade by employers (25%). With these three topical areas repeatedly cited by responders year after year there is a clear need for the education systems to start internalising the clear and obvious requirements now explicitly stated by the regional workplace.

47 The figures might not add to 100% due to rounding.
48 The figures might not add to 100% due to rounding.
49 The figures might not add to 100% due to rounding.

**Figure 57: Which of these competences did you need to learn or advance:**
(Those whose job required learning new or advancing skills in the past 12 months, N=951, multiple answers, %)

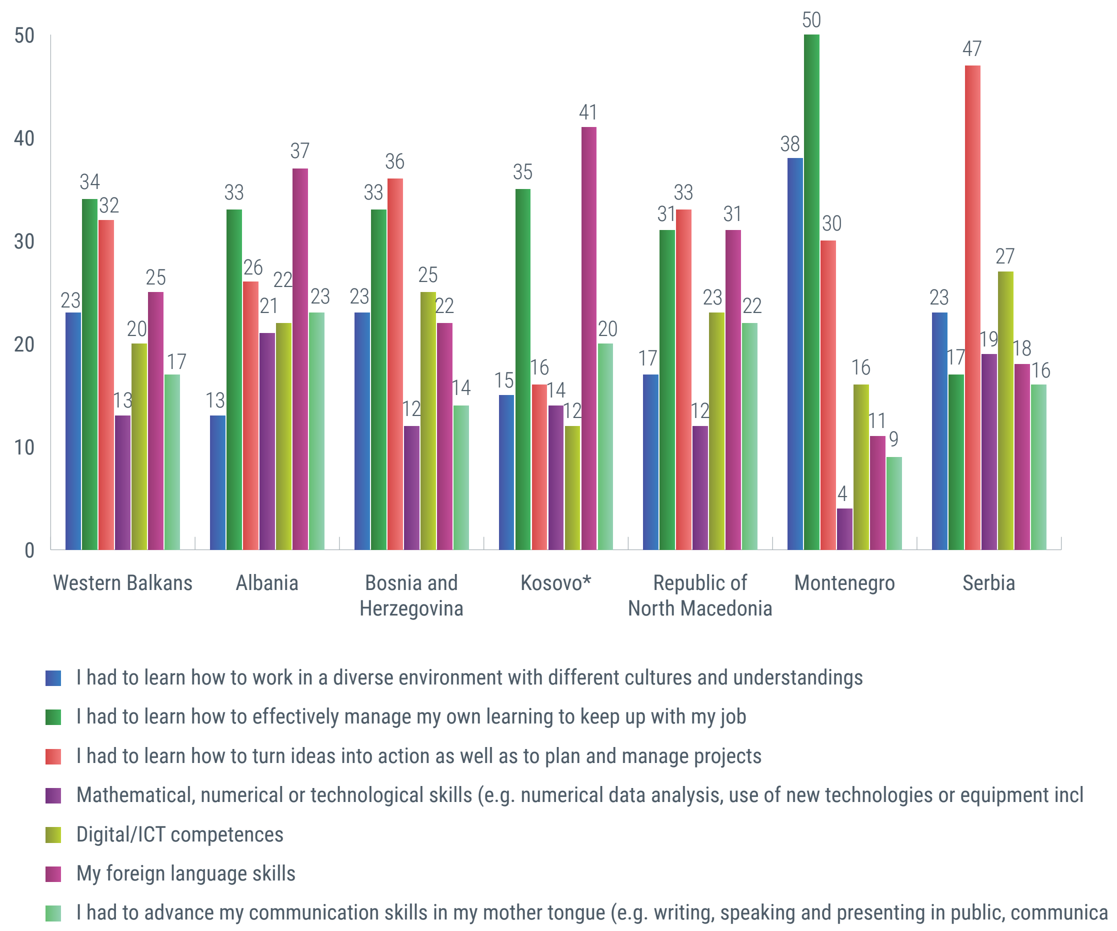
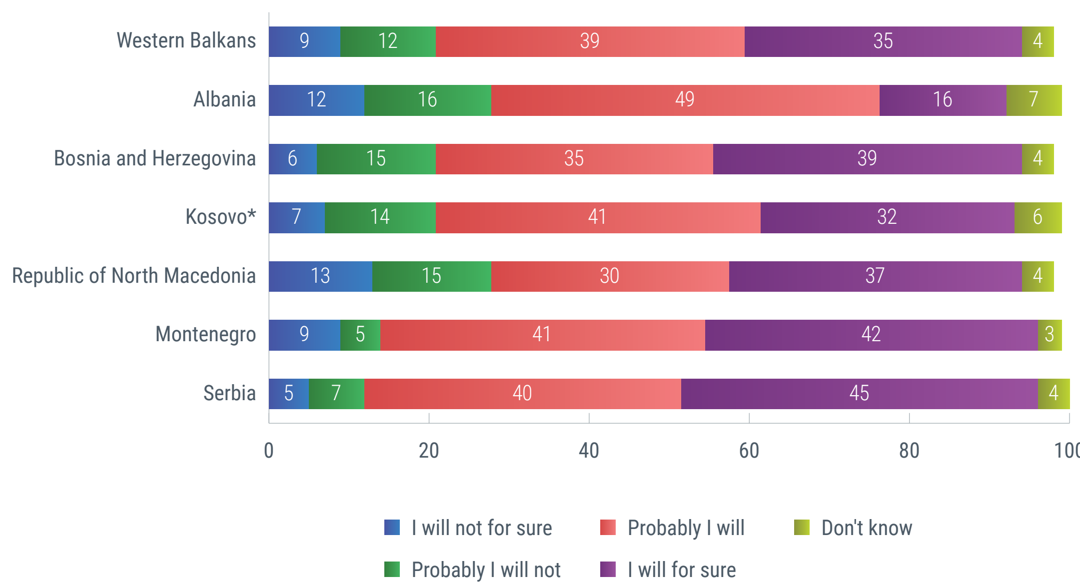
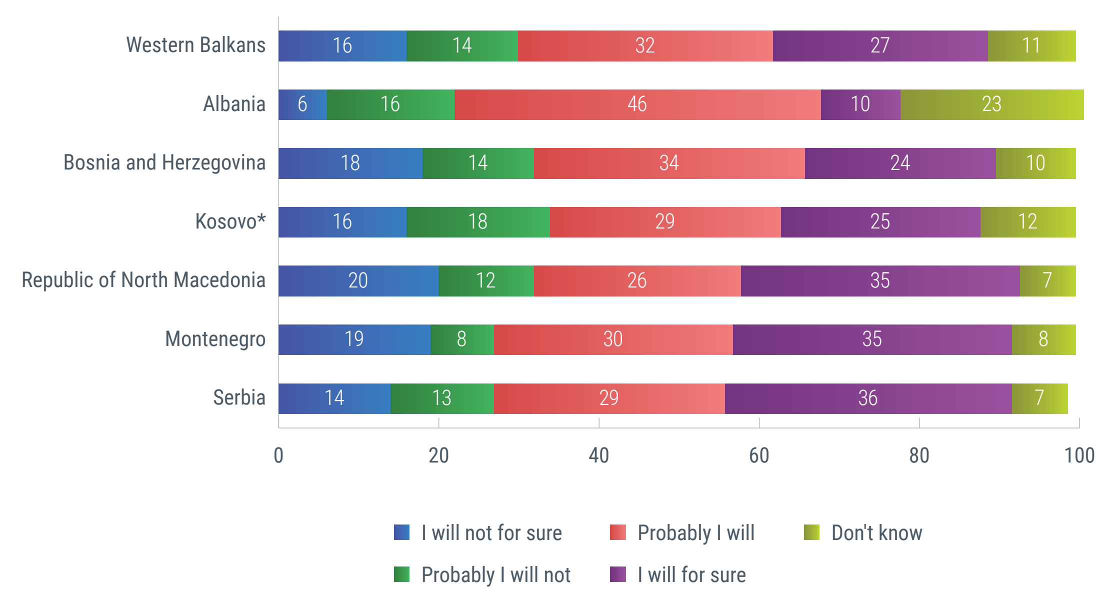



**Figure 58: Would you be ready to acquire additional qualifications to advance at work?**[50]
(Employed or self-employed people, N=2997, share of total %)




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

**Figure 59: Would you be ready to acquire additional qualifications in order to get a job?**[51]
(Unemployed respondents - N=1507, share of total, %)




Viewed by economy, half of all Montenegrin respondents were asked to improve their knowledge of foreign languages, while Serbian respondents were once more instructed to build their digitalisation skills to an extent unmatched by others in the region (47%).

In Kosovo*, understanding how to effectively manage own learning to keep up with their jobs was the most pressing development concern for employers (41%) while better communication skills in native tongue were especially popular with employers in Montenegro.

Coping with a diverse working environment was a mandated topic for employees in Albania to an extent greater than in any other regional economy (23%) while project management was especially popular with employers from Serbia (27%) and Bosnia and Herzegovina (25%).

Close to three quarters of all respondents are willing to undertake additional training in order to advance at work, a three-point increase compared to the previous edition of the Barometer. While this surge in interest sis not significant on its own it does nevertheless represent a reversal of a trend where interest in training as a career advancement tool was waning with every new edition of the survey.

Serbia is yet again home to the most willing trainees with 85% happy to undergo training in order to improve their career prospects. Albania, meanwhile, is in bottom of the ranking with only 65% of respondents eager to develop in order to help their career.

Interestingly, there are more respondents willing to train up within the ranks of the employed than the unemployed, even if the latter are offered jobs as incentive. Close to a third of all unemployed respondents describe themselves unwilling to acquire additional qualifications regardless of the impact on their job prospects (30%). What is concerning is the number of passive job seekers has grown by four points since 2018 and 11 since 2017. With significant numbers of people looking for jobs for a period of five years and longer, there is likely a strong correlation between this phenomenon and increasing apathy within the ranks of the unemployed. Kosovo*, with 34% of those not ready to pursue additional qualifications in return for employment, leads the unhappy rankings for the region.

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

# DIGITAL LITERACY AND DIGITAL SKILLS

There is growing awareness of the potential of digitalisation by an increasing number of the region's residents. While still relatively modest, the number of respondents pursuing training in information and communications technologies has grown steadily if not spectacularly.

With the proliferation of social media as well as messaging and calling apps, the region uses the Internet overwhelmingly as a tool for communication although other, traditionally less prevalent forms of online use are on the up, to include exploring education opportunity and paying bills. E-government services, however, are used by a mere 3% of the citizens surveyed indicating there is much work to be done by the region's governments in using digitalisation to improve access to public services by the population at large. Encouragingly, the number of respondents not using the Internet at all has significantly decreased regionally, down to 17% from 26% in 2018.

Meanwhile, most respondents still switch off their mobile data when roaming in the region while the percentage of those who don't use the mobile Internet at all stands at over a quarter of all respondents. More than a third of all respondents report saving money on phone costs with the new Regional Roaming Agreement, while 35% have recorded no effect on their phone bill.

Learning new information technologies continues to be a pursuit of a minority of respondents in the region, with few changes compared to the previous survey instalment.

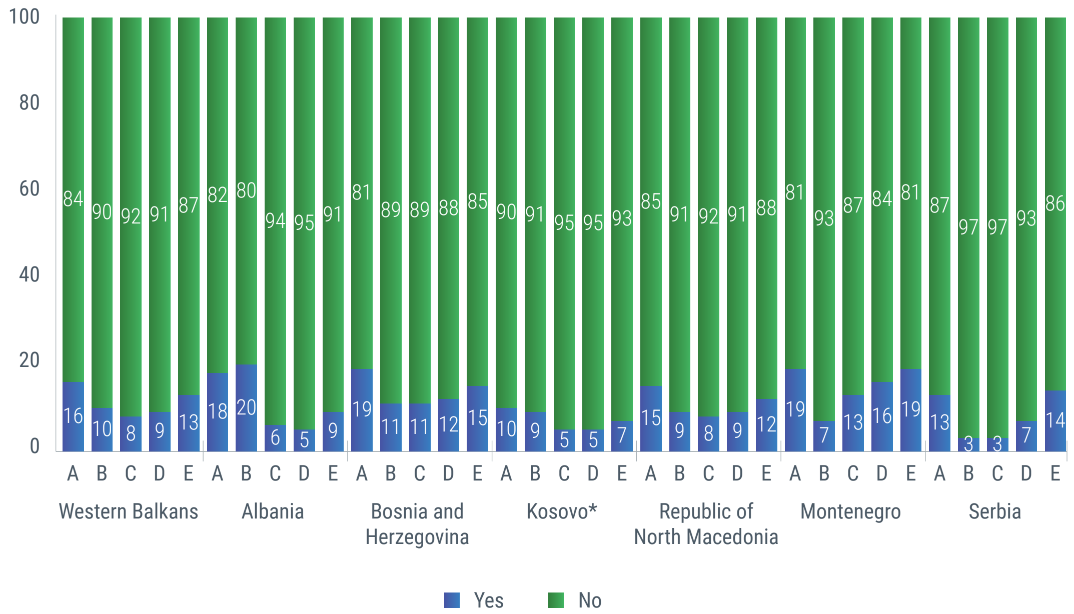
Free online training, or self-study, is the most prevalent source of learning (16%), followed by training provided in the workplace (13%), both top categories in the previous survey as well, although in reverse order. This indicates that the growing awareness of the potential of information technology and the changing requirements of the labour market are probably driving this behavioural change. Almost a fifth of all respondents in Bosnia and Herzegovina undertook free online training or self-study, a major surge in interest compared to last year (+9 points). Respondents were also more likely to pay for the IT training themselves than they were in 2018, although by a minimal margin (1 point). Albania stands out in this category, with 20% of respondents investing in their own education over the past year, an 11-point increase over 2018. Not all economies are moving at the same pace, however. Kosovo* has seen a notable reduction of respondents engaging in training across all training categories compared to 2018, with Serbia following close by in terms of a decline in interest in new technologies across four out of the five categories on offer. On average, Montenegro is seeing the largest proportion of respondents engaging in IT training compared to other economies in the region.

Out of those that undertook training in information technology, as last year, the majority learned how to use computers, software or applications (30%). The next most popular area of learning was social media (27%), followed by data analysis or management of databases, pursued by a quarter of all respondents. The results are almost the same as in 2018, with only two categories seeing a more significant increase – IT security has seen a surge of 5% compared to 2018 and training in using specialized software has seen an increase of 4% compared to last year.

Montenegro seems to have a slightly more specialised information technology sector with respondents from this economy making up the majority across a number of thematic learning areas, to include online marketing (33%), data analysis (33%), social media (33%) and programming languages (32%).

Serbia has the highest proportion of trainees learning about specific job-related applications (33%) while North Macedonian respondents attended training in the use of computers, software or applications to a greater degree than their counterparts across the region (39%).

**Figure 60: Have you carried out any of the following learning activities to improve your skills relating to the use of computers, software or applications in the last 12 months? - A - Free online training or self-study; B - Training paid by yourself; C - Free training provided by public programmes or organisations (other than your employer); D - Training paid or provided by your employer; E - On-the-job training (by e.g. co-workers, supervisors, etc.)[52]**
(All respondents - N=6020, share of total, %)




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

**Figure 61: In which of the following fields relating to the use of computers, software or applications did you carry out the training in the last 12 months?**
(All respondents - N=1526, multiple answers, %)

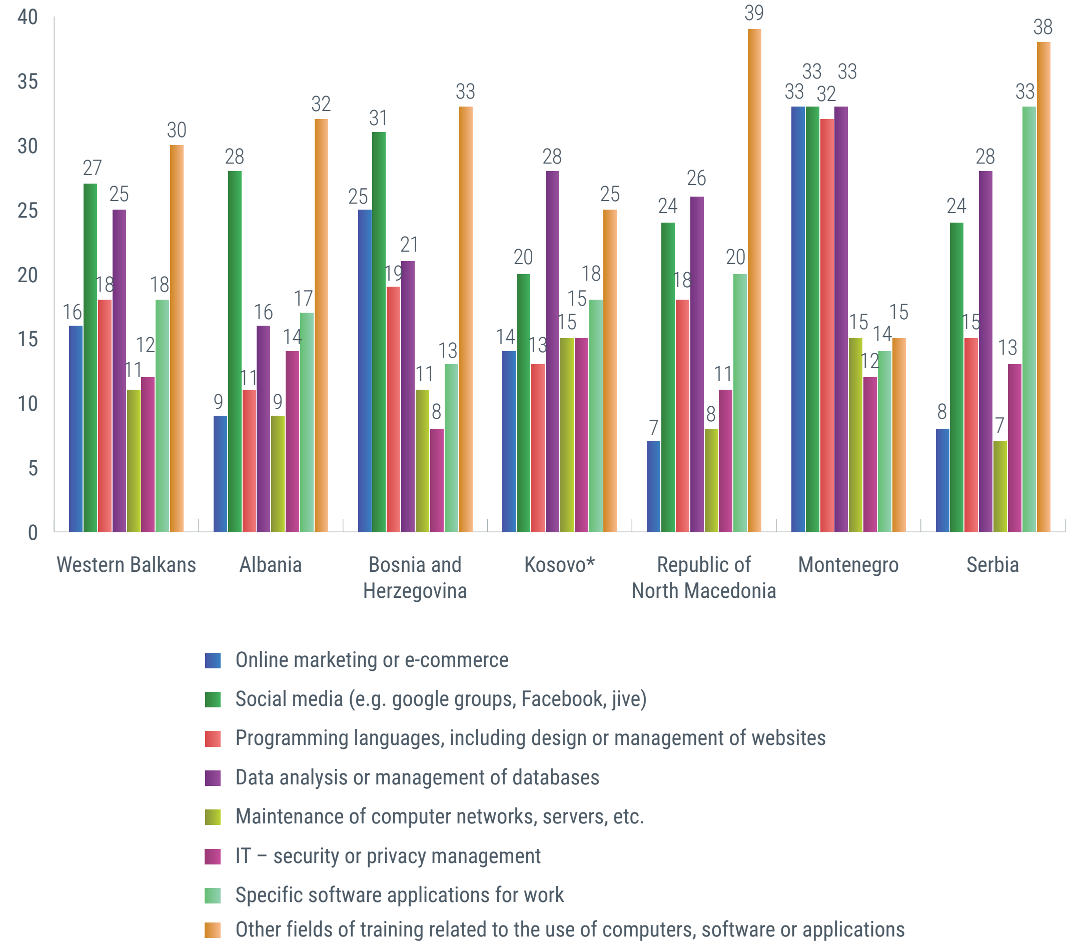
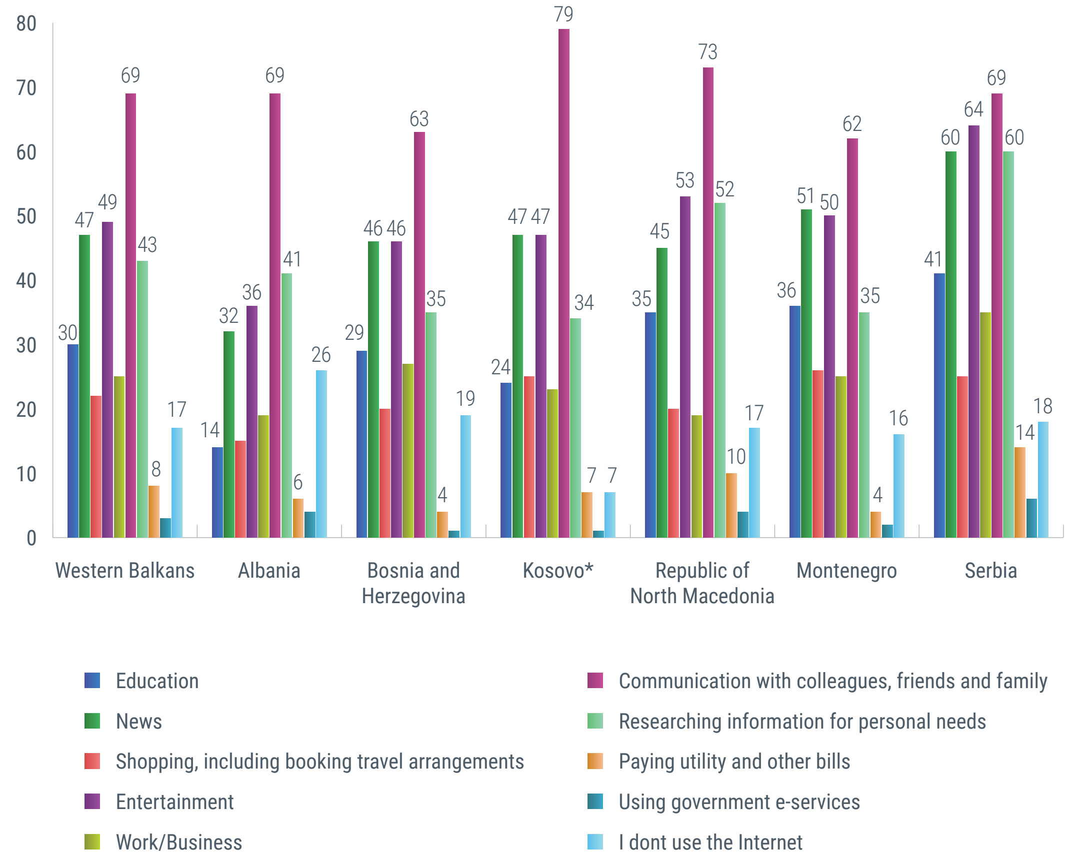


**Figure 62: Have you used the Internet for the following?**
(All respondents - N=6020, share of total, %)




With the proliferation of social media as well as messaging and calling apps, the region uses the Internet overwhelmingly as a tool for communication (69%). Entertainment (49%) and news (47%) are the second and third most cited form of Internet use in the region. Encouragingly, Internet use is also on the up in other, traditionally less popular, areas to include education (30%, up six points since 2018) and paying bills online (8%, up four points since 2018). E-government services, however, are used by a discouragingly small section of the respondents (3%) indicating a stronger need for further digitalization of public services to widen the access and increase efficiency in service deployment.

Encouragingly, the number of respondents not using the Internet at all has decreased by 9 points throughout the region compared to 2018, and now stands at 17%.

Close to two-thirds of the population in Serbia use the Internet for entertainment (64%), a regional high, while this economy also leads the region in the number of Internet users who go online in search of news (60%), pursue education opportunities (41%), pay bills (14%) and use e-government services (4%). With Serbia in the lead across so many categories it is clear that the economy's digitalisation push is starting to pay off.

Meanwhile, Montenegrins use the Internet to shop online more than any of their regional counterparts with 26%. At the other end of the scale, Albania is home to the highest proportion of respondents who don't use the Internet.

Rather remarkably, the top three issues raised by respondents regionally in 2018 have been identified in the same order and by an identical number of respondents in 2019 as well. Accordingly, speed (33%) and reliability (28%) are the two most important aspects of Internet use as highlighted by most respondents in the region, with price in third (24%).

Reliability of service appears to be an issue still in North Macedonia with the economy recording a regional high in respondents concerned with this aspect of Internet use (40%). Montenegrin respondents, meanwhile, tend to be most concerned with speed (38%) and price (37%). Coverage with Internet services remains a major issue in Kosovo* with more than a quarter of the population expressing concern (26%).

**Figure 63: Which feature is the most important aspect for you regarding your internet access?[53]**
(Those who have used internet - N=5004, share of total, %)

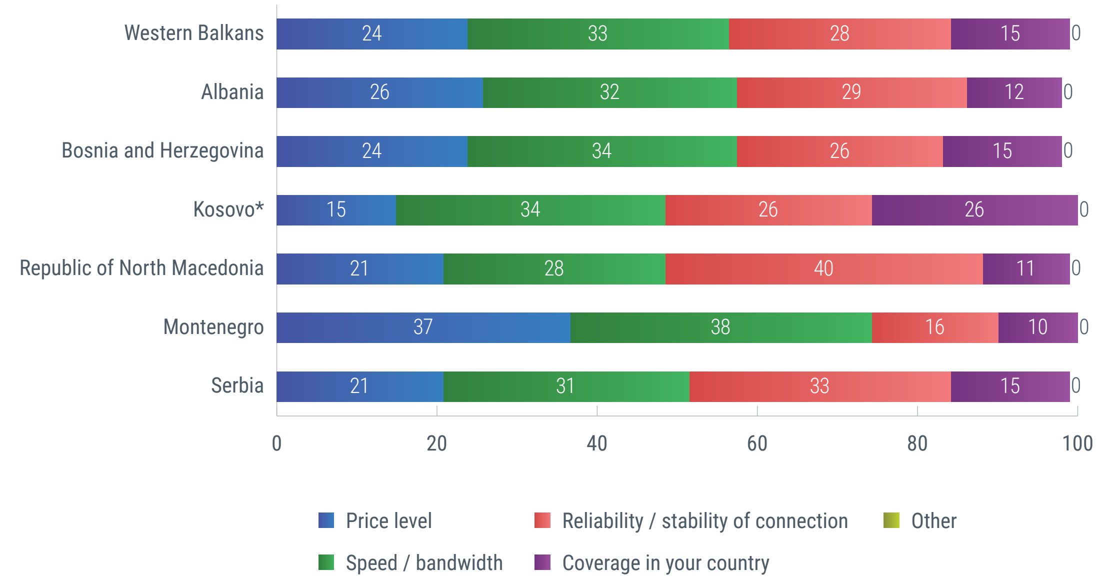
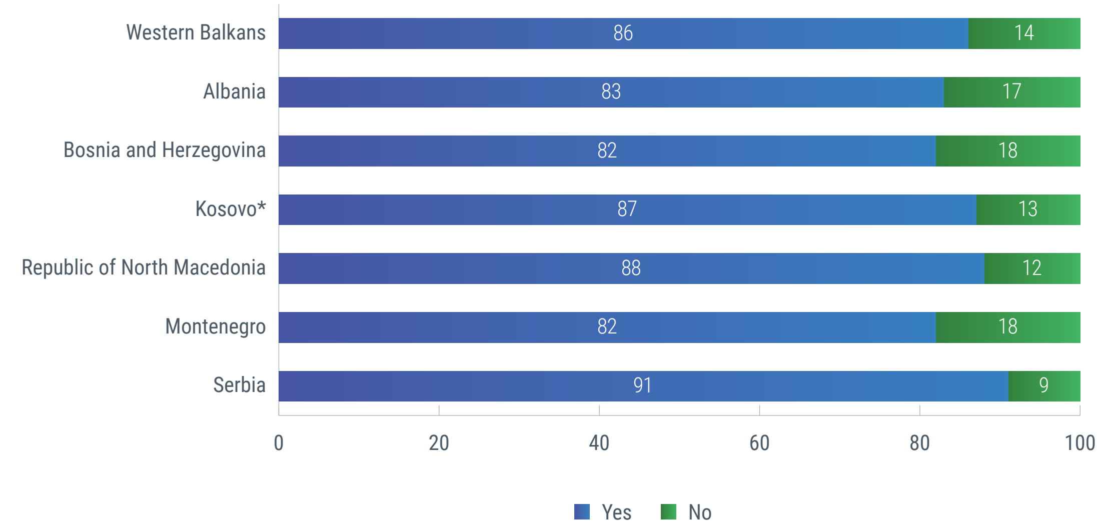



**Figure 64: Are you satisfied with your Internet connection?[54]**
(Those who have used Internet - N=5004, share of total, %)




Respondent satisfaction with the quality of the Internet continues to grow with each year as a record high 86% of the population in the region now declare themselves satisfied with their online experience. As previously, Serbia is home to happiest Internet users (91%), while respondents from Montenegro and Bosnia and Herzegovina are most dissatisfied, both at 18%.

Familiarisation through use seems to have alleviated some of the concerns previously held by Internet users in the region. Anxieties over theft of personal data have dropped by 13 points in the space of 12 months and are now held by less than a third of respondents (32%). The previously strong preference for in-person transactions is much less prevalent with only 16% expressing a bias against online purchases against 44% in 2018. Interestingly, concerns over security of online purchases have grown to 20% from 17% in 2018. Meanwhile, close to half of all respondents have no concerns over Internet transactions with this group most prominent in Kosovo* with nearly two-thirds of respondents (61%).

53 The figures might not add to 100% due to rounding.
54 The figures might not add to 100% due to rounding.

**Figure 65: What concerns do you have, if any, for using the Internet for things such as online banking or buying things online?[55]**
(Those who have used the internet - N=5004, share of total, %)

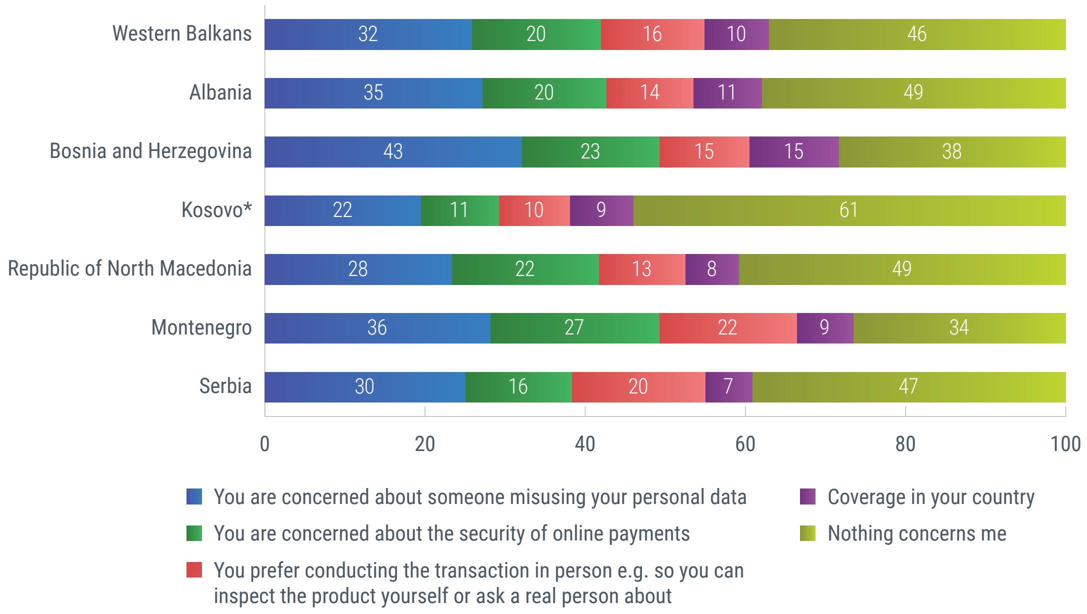
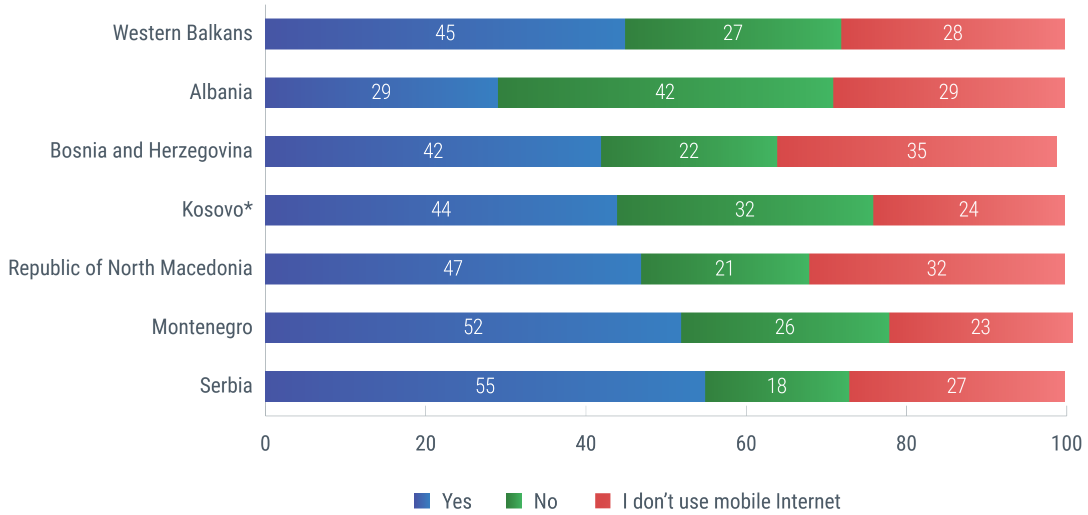



**Figure 66: Do you still turn off mobile data when you are roaming in the Western Balkans region?[56]**
(All respondents - N=6020, share of total, %)




Concerns over security of personal data are most widely held in Bosnia and Herzegovina (43%), alongside anxieties over not receiving goods purchased online (15%).

The preference for in-person transactions remains especially prevalent in Montenegro (22%).

Most respondents still switch off their mobile data when roaming in the region, with slightly over a quarter keeping it on regardless (27%). The percentage of those who don't use the mobile Internet at all is 28%.

Serbia boasts the highest proportion of respondents who deactivate their mobile Internet when travelling in the region with 55%, while Albania has the lowest proportion of respondents (less than a third) who switch it off. Bosnia and Herzegovina tops the region in the number of respondents who don't use mobile Internet with 35%.

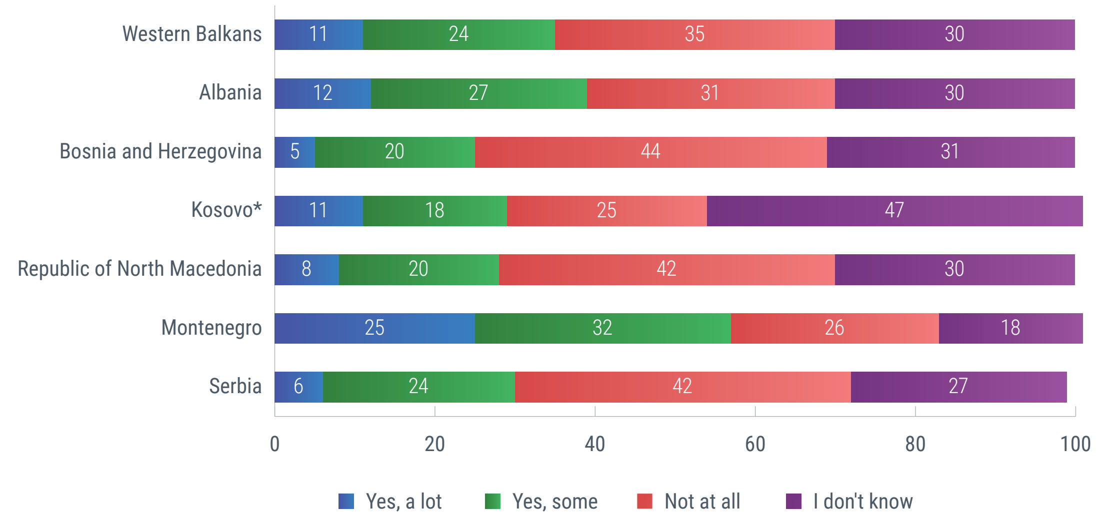
The new Regional Roaming Agreement has helped more than a third of all respondents save money on phone costs, while 35% reported seeing no effect on their phone bill. At the same time, a sizable 30% did

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

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



**Figure 67: Did the new Regional Roaming Agreement help you save money on your phone costs?[57]**
(N=4321, share of total, %)




not know or refused to answer, likely a result of a lack of awareness within the respondent community of the Regional Roaming Agreement as well as a consequence of a large proportion of the population not travelling outside of their economy.

When viewed by economy, it appears that Montenegro has benefited from the Regional Roaming Agreement more than any of its Western Balkans neighbours (57%) while Bosnia and Herzegovina has fewest survey respondents benefiting from a relaxation of roaming fees in the region (25%).

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

# ATTITUDES TOWARDS MOBILITY

Following a period of relative stability, the Barometer records another surge in interest when it comes to emigration from the region. Concerningly, the number of respondents willing to consider relocation has grown across all of the six economies indicating a regional trend.

Most prospective leavers, however, have only declarative interest in emigrating with no corresponding increase since 2018 in the ranks of respondents actively seeking out a move.

Meanwhile, regional migration remains a significantly less enticing prospect with the vast majority of the region's residents disinclined to consider moving to another Western Balkans economy for work.

The numbers of people travelling within the region have also surged, with the vast majority travelling for leisure; business-related trips still make-up a small minority of all travel within the Western Balkans.

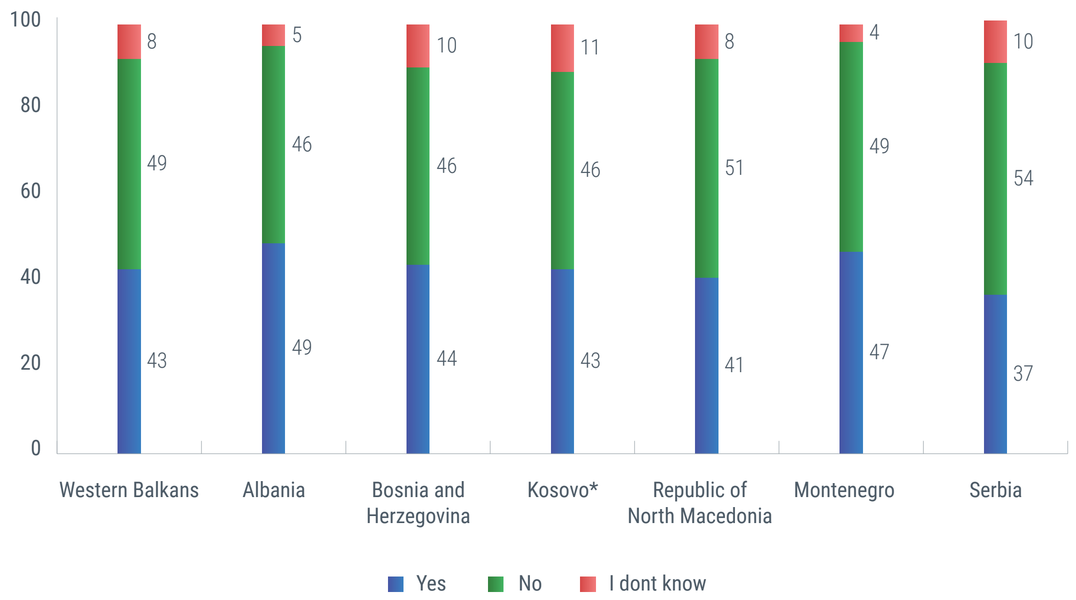
The region continues to grow steadily more open to arrivals from within the Western Balkans community with a 12-point increase in respondents supportive of inward migration from another regional economy recorded since 2016.

After a period of relative stabilisation in the numbers of prospective emigrants from the region, their ranks have swelled again with a four-point hike recorded since 2018 (43%, up from 39%). Significantly, respondents willing to consider relocation abroad have grown in number across all of the region's six economies.

As in 2018, Serbia boasts the fewest prospective leavers with 54% unwilling to consider moving abroad for work. Again, Albania is the only economy where the leavers outnumber the stayers (49% vs. 46%).

Meanwhile, Bosnia and Herzegovina has seen the most sizable surge in the number of prospective leavers in the course of 2019 with that figure now at 44% of the respondent population (up from 34% in 2018).

**Figure 68: Would you consider leaving and working abroad?[58]**
(All respondents - N=6020, share of total, %)




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

**Figure 69: In what phase of consideration are you?[59]**
(Those considering leaving and working abroad - N=2607, share of total, %)

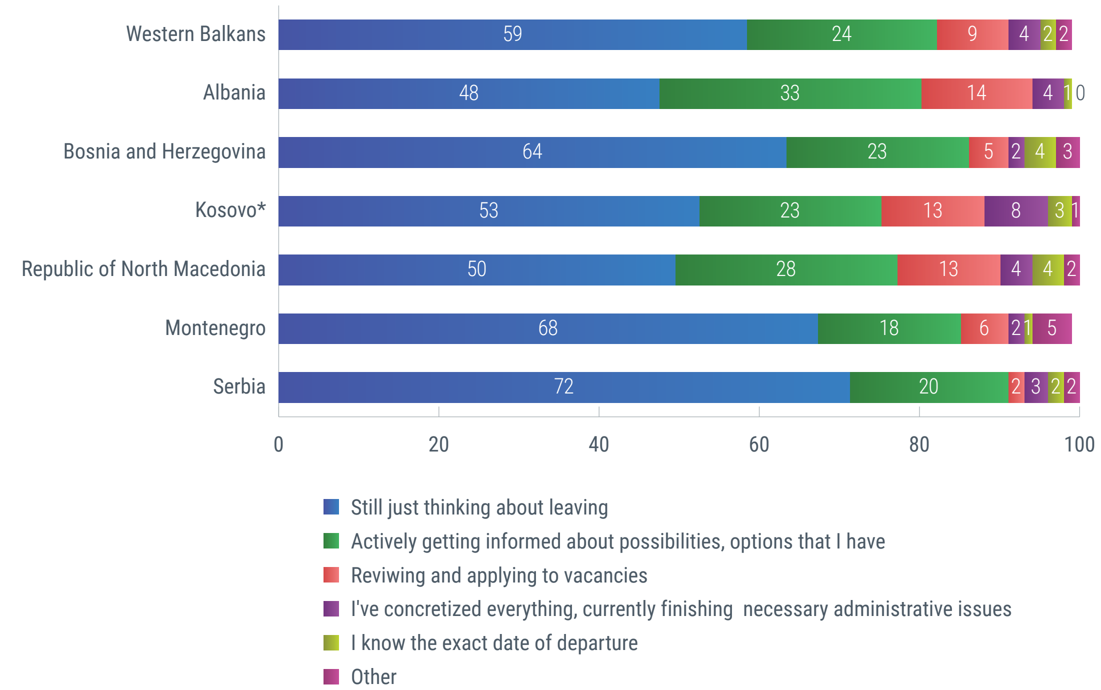
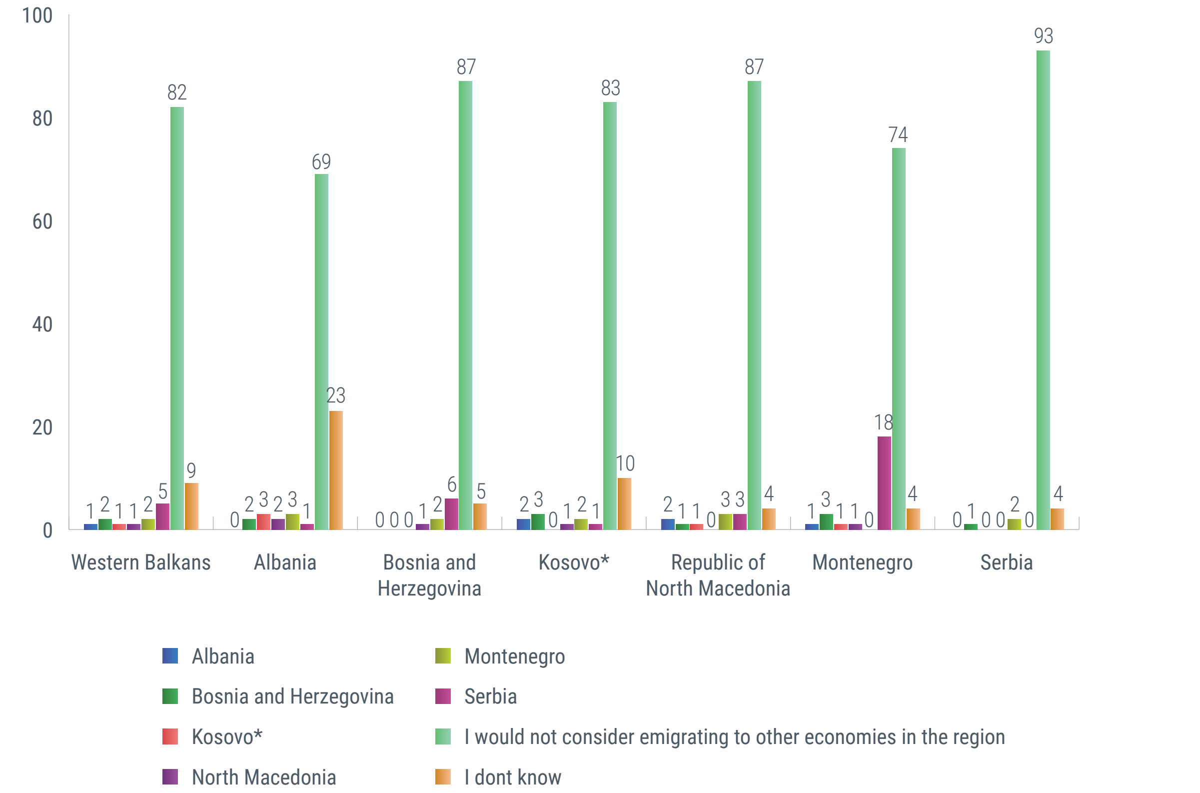



**Figure 70: Would you consider leaving and working in another place in the SEE region? If yes, where?[60]**
(All respondents - N=6020, multiple answers, %)




59 The figures might not add to 100% due to rounding.
60 The figures might not add to 100% due to rounding.

While the numbers of those considering leaving the region for work may have increased, there is no major change to report with regards to the respondents' immediate intentions when compared to 2018. Namely, a majority are only entertaining the idea without having taken any concrete measures (59%) while just under a quarter are taking active steps to get informed about options (24%). Some 9%, up from 6% in 2018, are applying for work abroad and 4% are on their way out, pending administrative clearance. As in previous years, only 2% of all respondents know the date of their departure.

Serbia is home to most respondents who are currently just thinking about leaving (72%) while in Albania a third of relevant survey participants are actively looking into possibilities. Kosovo*, meanwhile, has the most respondents who are on their way out and are just awaiting administrative approval (8%).

While migration remains an enticing prospect, at least nominally, for many in the region there appears to be little appetite for making that move within the Western Balkans neighbourhood; 82% of all respondents presently have no interest in moving to another regional economy for work.

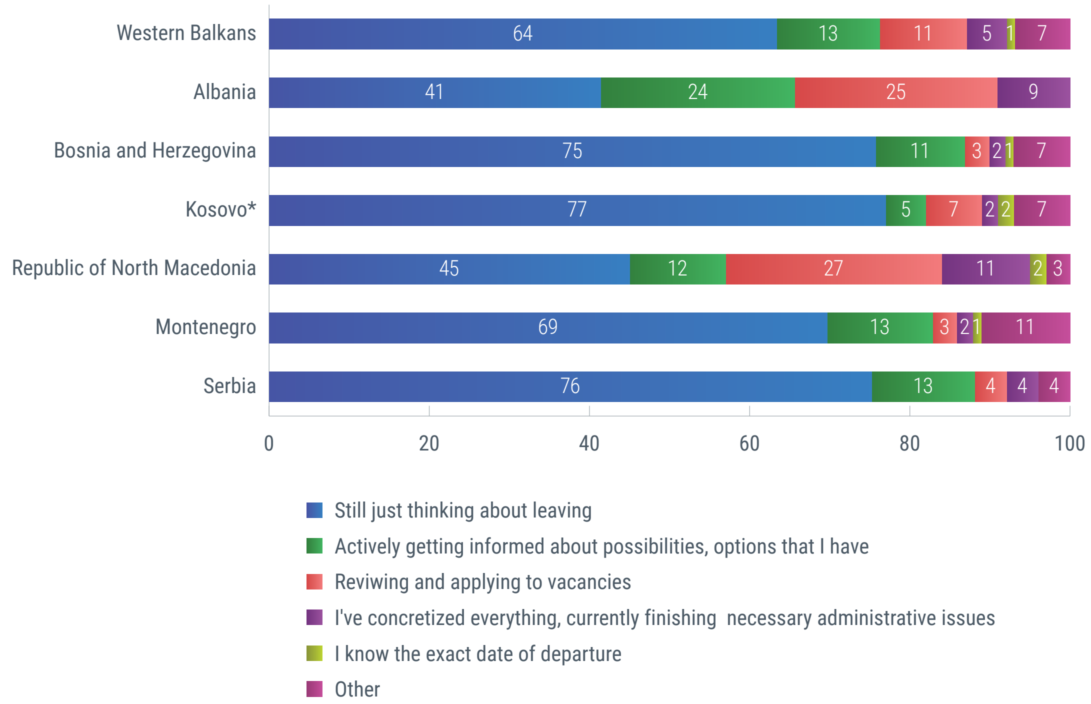
As previously, Serbia has the fewest prospective emigrants (93% would not consider moving to another SEE economy) in the Western Balkans while it also, interestingly, represents the single most attractive destination for other economies in the region. Admittedly, this owes much to a clear and stated preference of Montenegrin respondents to move to Serbia in search for work (18%).

As with migration outside of the Western Balkans, most prospective regional emigrants are still only thinking about moving (64%, up from 52% in 2018), while some 13% are actively looking into options in the region. 11% are presently applying for jobs while 5% are awaiting administrative clearance to move. As with migration in general, only a small percentage, 1%, know exactly when they are departing.

Kosovo* has 77% of eligible respondents only thinking about moving, a regional high, while North Macedonia is home to the most proactive group of respondents with 27% currently reviewing, and applying to, vacancies as well 11% of those who are merely awaiting admin approval.

More than half of the respondent population did not visit another economy in the region over the past 12 months (54%). While still relatively low, the proportion of respondents traveling within the Western Balkans area has surged by 10 points with Serbia and Montenegro the most popular regional destinations, followed by Albania and Bosnia and Herzegovina.

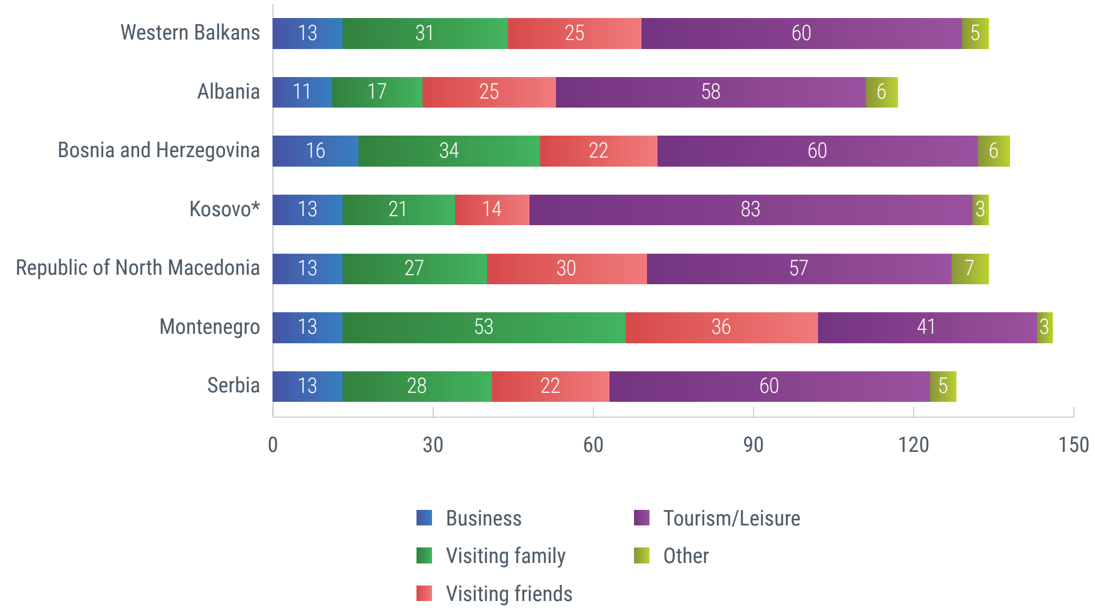
**Figure 71: In what phase of consideration are you?[61]**
(Those considering leaving and working in the Western Balkans region - N=568, share of total, %)




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

**Figure 72: Did you travel anywhere in the region in the past 12 months? If yes, where?**
(All respondents - N=6020, share of total, %)


**Figure 73: What was the purpose of your travel?**
(Respondents who travelled – N=2664, multiple answers, %)




While a popular destination, Serbia is home to a population least likely to travel the region; Montenegrins were the most active, with most of their trips being to Serbia. Travellers from Kosovo* were by far most likely to visit Albania.

Holidaying accounts for most of the visits to the region reported by survey respondents as 60% travelled for tourism/leisure. With visits to family (31%) and friends (25%) again coming in second and third as the most common reasons to travel, business accounts for only 13% of all regional visits. Travellers from Bosnia and Herzegovina did so for work to an extent greater than any other regional economy while respondents from Kosovo* most often travelled for leisure (83%).

Most of the region's residents feel welcome anywhere in the Western Balkans cities, with a five-point hike in this category since 2018. Meanwhile, 17% feel welcome in some and unwelcome in other cities of the region. A small minority (2%) feel unwelcome anywhere in the region, while 28% have not visited other parts of the region. Overall, a small but noticeable trend of increased openness towards other economies in the region is emerging.

**Figure 74: Do you feel welcome abroad, when traveling to other cities in the Western Balkans region either for business or leisure?[62]**
(All respondents – N=6020, multiple answers, %)

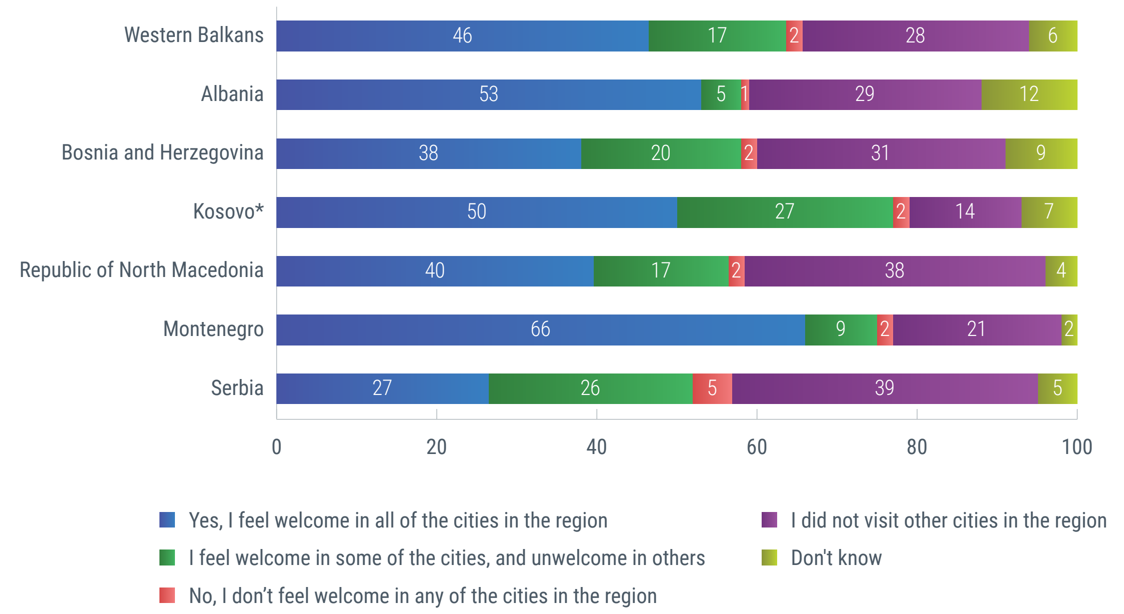
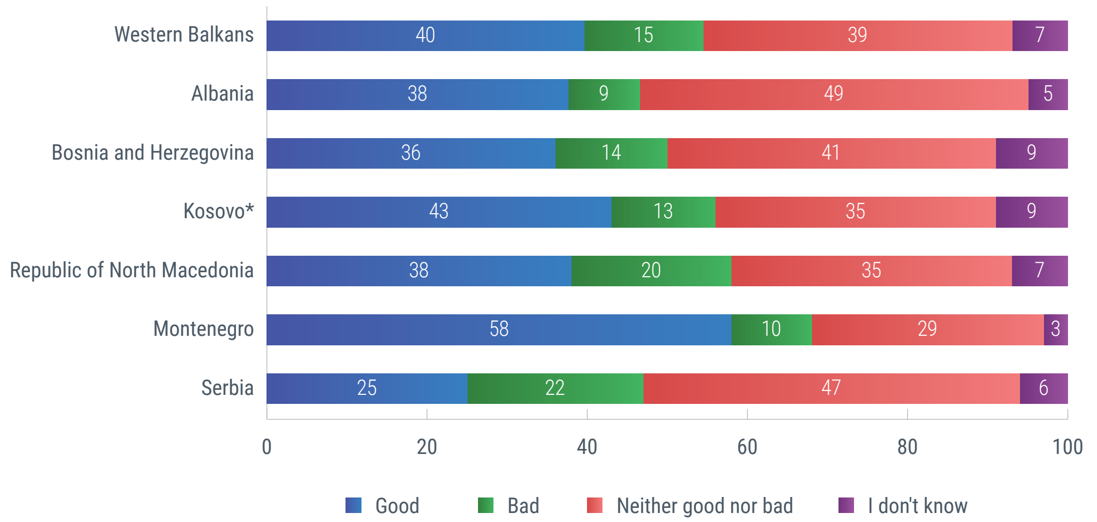



**Figure 75: What do you think about people from other parts of the region coming to live and work in your economy? Is it good or bad for your economy?[63]**
(All respondents – N=6020, multiple answers, %)




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

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

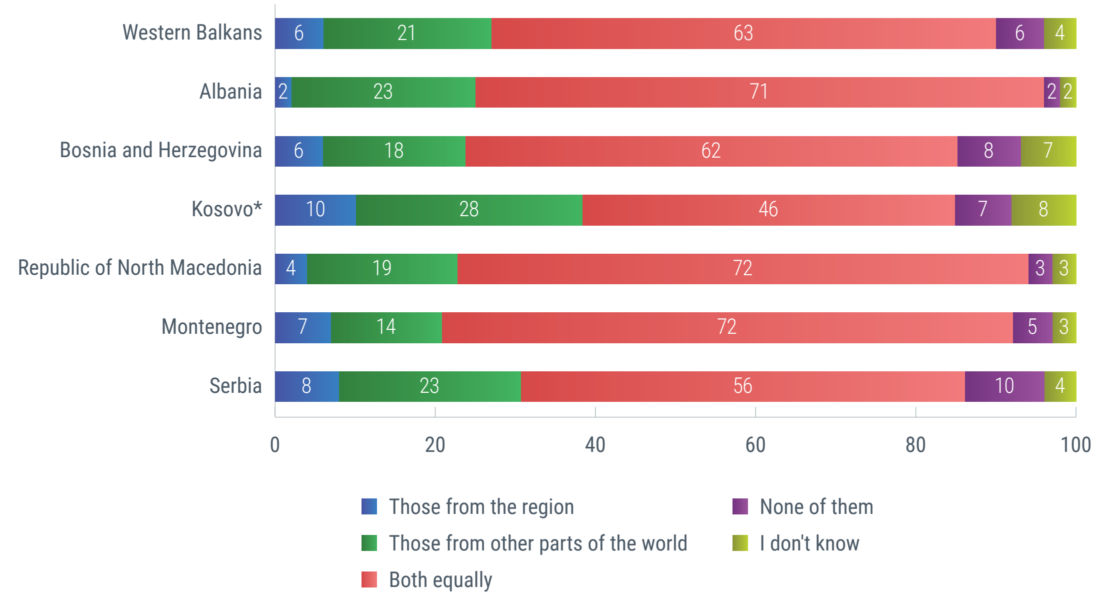




*Table 7: Sentiment on people from other parts of the region coming to live and work in respondent's economy - overview 2016-2019 (All respondents, share of total, %)*

| | 2016 | 2017 | 2018 | 2019 |
|---|---|---|---|---|
| Positive | 28 | 31 | 36 | 40 |
| Negative | 23 | 19 | 19 | 15 |
| Neutral | 43 | 45 | 38 | 39 |

**Figure 76: Which tourists would you like to have more in your economy, those from the SEE region or from other parts of world?[64]**
(All respondents – N=6020, multiple answers, %)




More than a third of surveyed respondents in Serbia and North Macedonia did not visit other cities in the region (39% and 38%, respectively) while Montenegrins are most likely to feel welcome anywhere (66%). Some 5% of respondents from Serbia feel unwelcome anywhere in the Western Balkans, a regional high.

The region continues to become increasingly open to arrivals from within the Western Balkans community with 40% of all respondents now supportive of inward migration from another regional economy (+4 compared to 2018). This year's survey also sees a four-point drop in the ranks of respondents hostile to the idea (15%). Overall, since 2016, the number of survey participants supportive of regional arrivals has grown by 12 points and represents a promising development in regional relations.

Montenegro is the region's most welcoming economy with 58% of respondents supportive of incoming migration from within the region. Meanwhile, only a quarter of survey participants from Serbia are happy to see people from the region moving to their economy for work.

Albania is home to the largest concentration of neutral respondents in the Western Balkans with 49%.

A growing proportion of the region's residents do not distinguish between tourists from the Western Balkans and those from elsewhere in the world (63%, up from 57% in 2018). Roughly every fifth respondent prefers tourists from other parts of the world (21%, from 20% in 2018) while 6% favour visitors from the region (-2 compared to 2018).

Respondents from Montenegro and North Macedonia are least likely to have a bias towards a particular group (neutral groups are at 72% for both economies) while survey participants from Kosovo* prefer out-of-region guests to an extent greater than the other economies in the region (28%). Every tenth respondents from Serbia is hostile to the idea of tourists regardless of their origin.

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

# ATTITUDES TO SOCIAL INCLUSION OF VULNERABLE GROUPS

Empathy for the socially excluded is not universal and depends on their identity as well as membership of a particular group. Affirmative action is considered far more palatable for some than for others with Roma once more pushed to the economic and social margins. Inclusion for the Roma community, however, is becoming an economic as well as a moral necessity – with negative demographics at work alongside ever-growing outward migration, the region can ill-afford to continue alienating another source of previously dormant labour. Better integration will also yield indirect benefits for the state through greater revenue basis and lower welfare spending. Most importantly, though, it will improve the Roma's access to education, quality housing, healthcare and other essential services.

Empathy for the socially excluded is not universal and is once more closely linked to membership to a particular category. Respondents are significantly more likely to support affirmative action in employment for people with disabilities as opposed to displaced persons or refugees, or members of the Roma community. In fact, some 91% feel that persons with disabilities should be given special privileges when seeking a job in the public sector against 72% who feel the same care should be afforded to internally displaced persons and refugees, 75% who feel those privileges should be extended to Roma and 76% who favour affirmative employment action for other minorities.

*Table 8: To what extent do you agree with the following statement - The Government should provide affirmative measures - promote opportunities for equal access - to persons belonging to the groups listed below in the following circumstances (SEE region): A – When applying for a public sector job and B - The Government should do more in order to ensure better housing conditions – (All respondents, N=6060, scale from 1 to 4, sum of responses indicating "tend to agree" and "totally" agree)*

| Sum of "tend to agree" and "totally agree" | | Western Balkans | Albania | Bosnia and Herzegovina | Kosovo* | Republic of North Macedonia | Montenegro | Serbia |
|---|---|---|---|---|---|---|---|---|
| Persons with disabilities | A | 91 | 97 | 88 | 88 | 89 | 92 | 89 |
| | B | 91 | 98 | 91 | 90 | 90 | 92 | 88 |
| Displaced persons and refugees | A | 72 | 86 | 79 | 78 | 46 | 86 | 60 |
| | B | 74 | 86 | 81 | 83 | 49 | 87 | 57 |
| Roma population | A | 75 | 88 | 77 | 82 | 68 | 87 | 48 |
| | B | 74 | 84 | 79 | 84 | 66 | 88 | 43 |
| Other minorities | A | 76 | 87 | 81 | 82 | 66 | 88 | 52 |
| | B | 74 | 85 | 80 | 84 | 63 | 88 | 45 |

totally agree    totally disagree





The contrast is particularly evident in Serbia where affirmative employment measures for Roma yield the lowest support in the region (48%), along with little support for affirmative employment measures for other minorities (52%) and displaced persons (60%). The Republic of North Macedonia is another regional outlier where fewer than half of the population support affirmative measures for displaced persons and refugees, while 68% support affording Roma special consideration in employment. It is noteworthy that the Republic of North Macedonia is also home to what is estimated to be the region's largest Roma community.[65]

Meanwhile, the discrepancy in attitude towards the excluded groups is least pronounced in Montenegro.

The results are quite similar when respondents are asked to weigh in on whether governments should do more to provide durable shelter for marginalised groups; 91% support public housing initiatives for disabled persons, against 74% who do so for internally displaced persons, refugees and Roma, and other minorities. As with access to jobs, there is little substantive change in results compared to last year.

This remains true for individual economies as well. Respondents from the Republic of North Macedonia are least likely to support their government providing housing assistance to displaced persons and refugees (49%). Survey respondents from Serbia are, meanwhile, unlikely to endorse affirmative housing measures for Roma and other minorities to an extent well above the regional average.

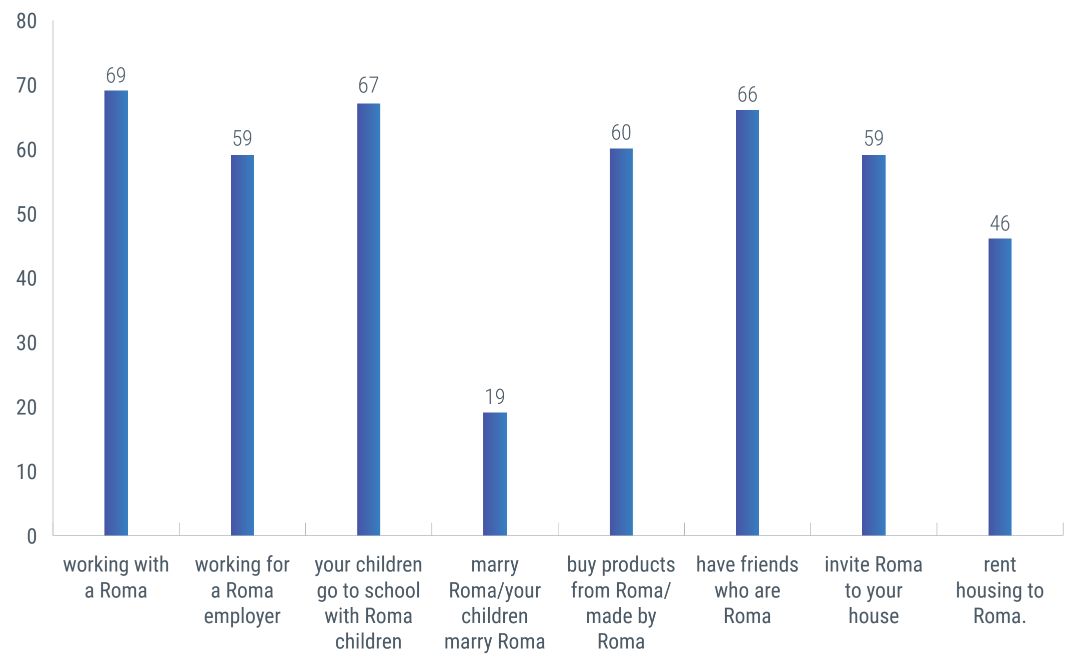
As with employment, respondents from Montenegro are most likely to support equitable government intervention across all categories surveyed.

After several years of results that seemed to indicate the gap in perception of the various categories was narrowing, this year's survey sees it widen once more. This is especially evident in individual economies such as Serbia where overall economic growth and surging employment seem not to have translated into a more charitable outlook towards selected minority groups.

There is a clear and present pattern of prejudice in how the Roma community is perceived across the Western Balkans region and this continues to have a hugely detrimental impact on their ability to gain access to critical public services and enjoy economic and social opportunities on offer to others in the re-

**Figure 77: How likely is it that you are comfortable with: 1) working with a Roma; 2) working for a Roma employer; 3) your children going to school with Roma children; 4) marry Roma/your children marry Roma; 5) buy products from Roma/made by Roma; 6) have friends who are Roma; 7) invite Roma to your house.**

(Western Balkans respondents – N=6020, "somewhat comfortable" + "comfortable", % of total)




65 http://documents.worldbank.org/curated/en/642861552321695392/pdf/Breaking-the-Cycle-of-Roma-Exclusion-in-the-Western-Balkans.pdf

gion. Less than half of the population would consider renting housing to Roma (46%), depriving them of shelter, while a third would not work for a Roma employer, severely restricting their entrepreneurial potential; the same number would not be comfortable buying products from Roma vendors. Meanwhile, a quarter of all respondents surveyed would not work with a Roma colleague.

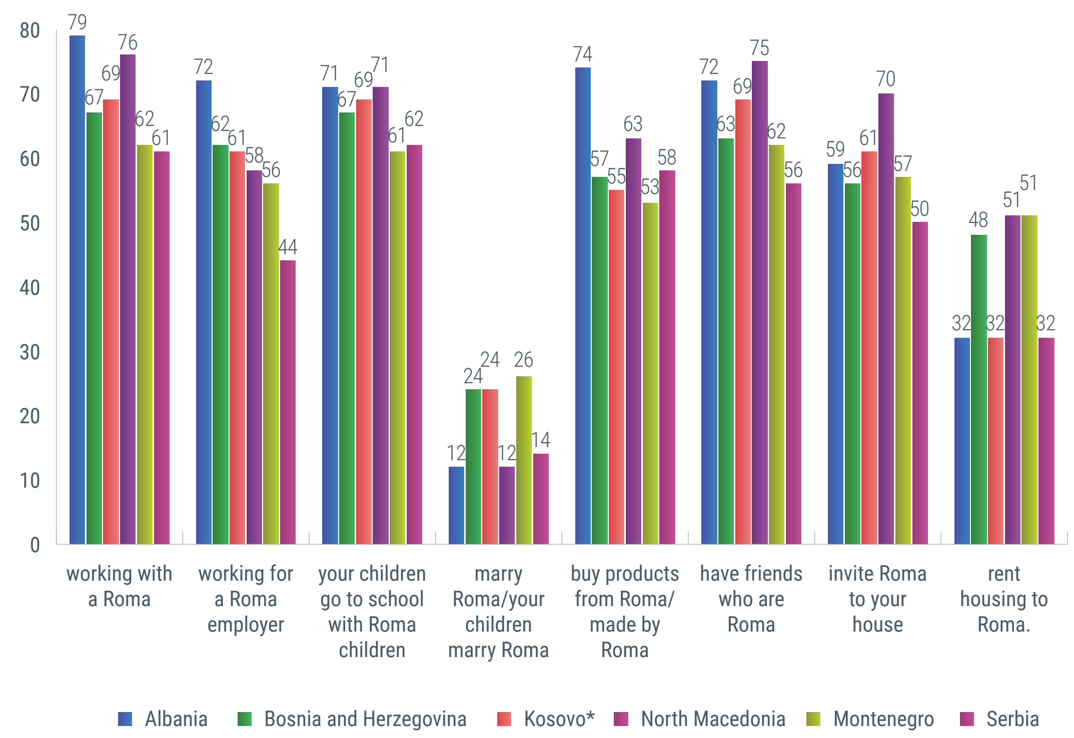
Looking at the social context, an incredible 70% of the surveyed population would not be comfortable with marrying, or having their children marry, a Roma person while slightly more than a quarter (26%) don't want their children sharing a classroom with a student from the Roma community. More than a third (34%), meanwhile, would not consider entertaining Roma in their homes.

Respondents from the Republic of North Macedonia and Albania are most likely to reject marriage with a Roma (78% and 77%, respectively) and, interestingly, least likely to object to working alongside one (19%). Montenegrin respondents, meanwhile, are most open to the idea of marrying, of having their children marry, a Roma (62%) but are also most likely to object to having a Roma co-worker (31%).

More than half of all respondents in Serbia are uncomfortable with the idea of renting housing to a Roma tenant (51%), a regional high, with the Republic of North Macedonia at the other end of the scale, with 36% of reluctant landlords. At the same time, 31% of Montenegrins are unhappy with the idea of their children sharing a classroom with a Roma pupil while the same proportion of respondents from that economy is unlikely to have a Roma friend. An identical percentage of respondents from Albania and Serbia would not invite Roma into their homes for entertaining purposes (37%).

In terms of access to economic opportunities, 40% of Montenegrins would not buy from a Roma vendor while 41% of respondents from Serbia would refuse work for a Roma employer, two stark reminders of the obstacles faced by the region's largest ethnic minority.

**Figure 78: How likely is it that you are comfortable with: 1) working with a Roma; 2) working for a Roma employer; 3) your children going to school with Roma children; 4) marry Roma/your children marry Roma; 5) buy products from Roma/made by Roma; 6) have friends who are Roma; 7) invite Roma to your house.**
(All respondents per individual economies – N=6020, "somewhat comfortable" + "comfortable", % of total)








# PERCEPTIONS ON TRADE

Encouragingly, a growing number of respondents support strengthening commercial ties within the Western Balkans region.

Unsurprisingly, the preferred trade partner for the region's economies is the European Union, with Russia and Turkey in joint second. It is worth noting, however, that preferences by economy vary significantly.

Consumer confidence in domestic products remains high and is growing, both when compared to competitors from the region as well as from the EU. In an encouraging development for the region's industry, respondents tend to overwhelmingly and increasingly favour domestically sourced food and beverages with products from the region second choice, ahead of products from the European Union. In another boon to local vendors, respondents from the region overwhelmingly feel that domestic suppliers should be given preferential treatment by their respective governments

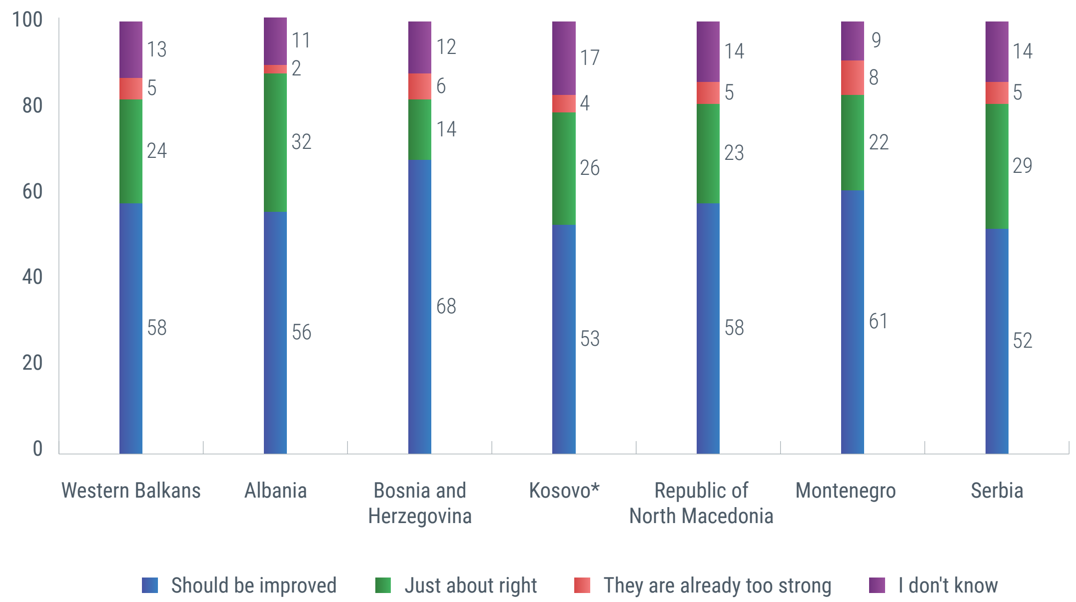
Encouragingly, a growing proportion of respondents support strengthening of commercial ties within the Western Balkans region (58%, up from 53%). At the same time, the numbers of those who describe the ties as sufficient, or excessive, have dwindled.

Respondents from Bosnia and Herzegovina are most forceful in their support of stronger regional trade ties with 68% (up by 15 points compared to 2018) while survey participants from Albania are most likely to describe them as optimal. Respondents from Montenegro, meanwhile, are most vocal in their characterisation of regional trade ties as too strong, as was the case in 2018.

Again, a sizable majority of the region's residents expect the entry of foreign companies into the domestic market to improve conditions for consumers (67%) while roughly a quarter are sceptical about the perceived benefits.

Respondents from Albania are most likely to view foreign companies positively (77%), with Bosnia and Herzegovina and Serbia at the other end of the spectrum with nearly a third of the respondent population unhappy at the prospect of foreign corporations entering the domestic market (30%). Interestingly, Serbia was last edition's leading proponent of opening up the domestic market to foreign sellers with support now dropping by a significant six-point margin in the course of a single year.

**Figure 79: How would you describe commercial and trade links of your economy with Western Balkans region?[66]**
(All respondents - N=6020, share of total, %)




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

**Figure 80: Do you agree that in general entering of foreign companies in the market of your economy will improve choice and decrease prices for consumers?[67]**
(All respondents – N=6020, share of total, %)

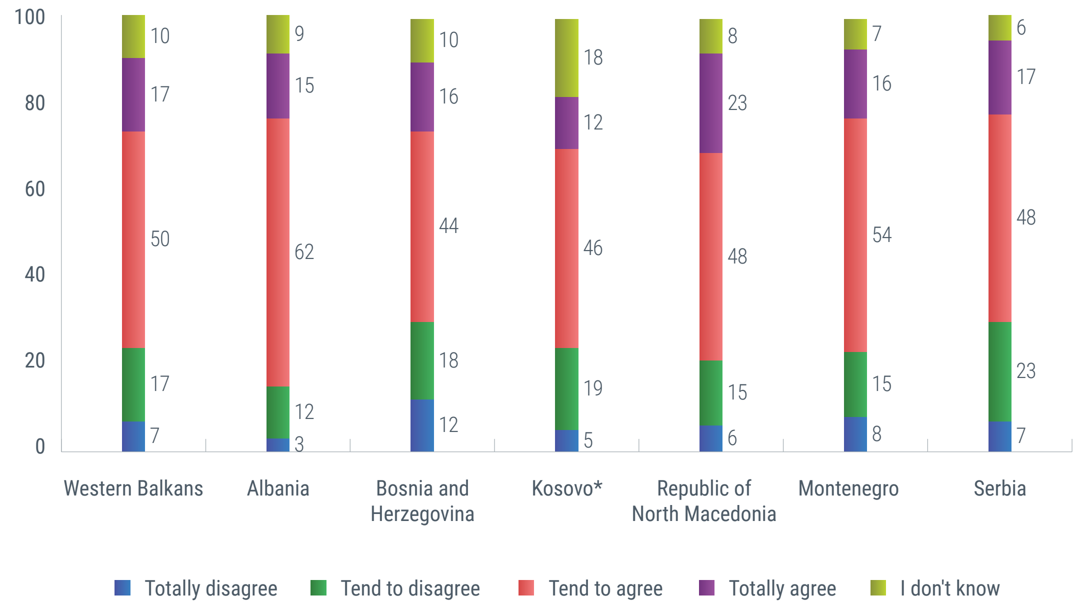
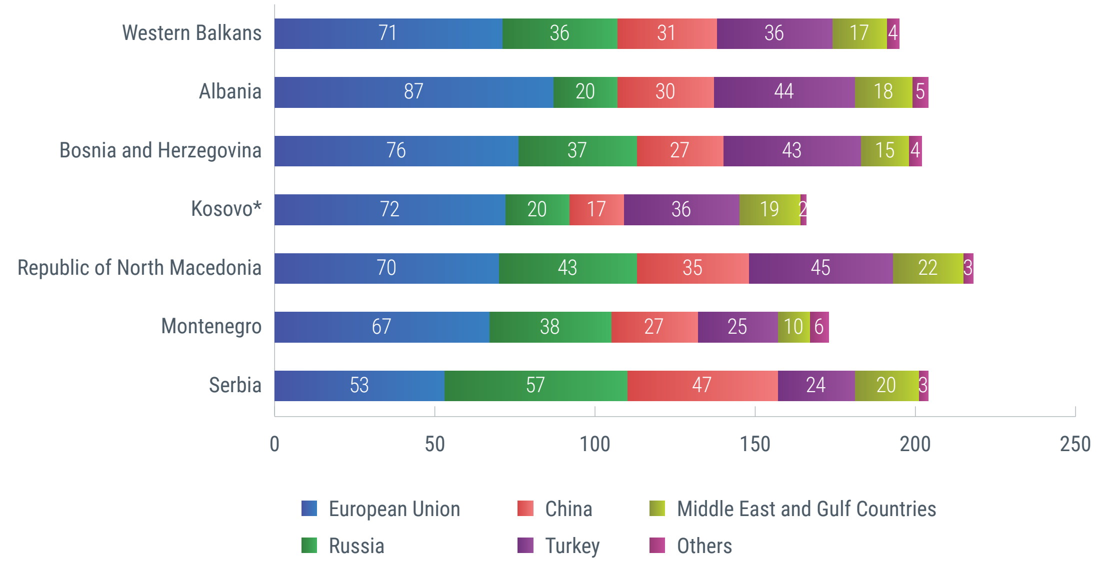



**Figure 81: Which economies/regions do you think your government should improve trade and investment relations with?[68]**
(All respondents – N=6020, share of total, %)




For the first time since its inception, the Barometer is looking at who the preferred trade partners for the region's economies are, with the EU convincingly leading the rankings; more than two thirds of all respondents in the Western Balkans would like to see commercial relations improved with the European Union (71%). Russia and Turkey are joint second with 36% while China is in fourth with 31%. Some 17% would like to see trade enhanced with Middle Eastern and Gulf countries.

Preferences by individual economy paint a rather diverse picture of favoured trade partnerships. A majority of respondents in Serbia would prefer strengthening ties with Russia (57%) and China (47%) over other regions and economies while an overwhelming majority of survey participants in Albania favour the EU (87%). Meanwhile, Turkey is the most popular trade partner in North Macedonia (45%), alongside the Middle East (22%).

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

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





**Figure 82: Do you agree with the following statements? A - Products and goods of my economy can compete well with products and goods from other SEE economies (Albania, Bosnia and Herzegovina, Kosovo*, Republic of North Macedonia, Montenegro, Serbia); B - Products and goods of my economy can compete well with products and goods from the EU[69]**
(All respondents – N=6020, scale from 1 to 4, share of total, %)

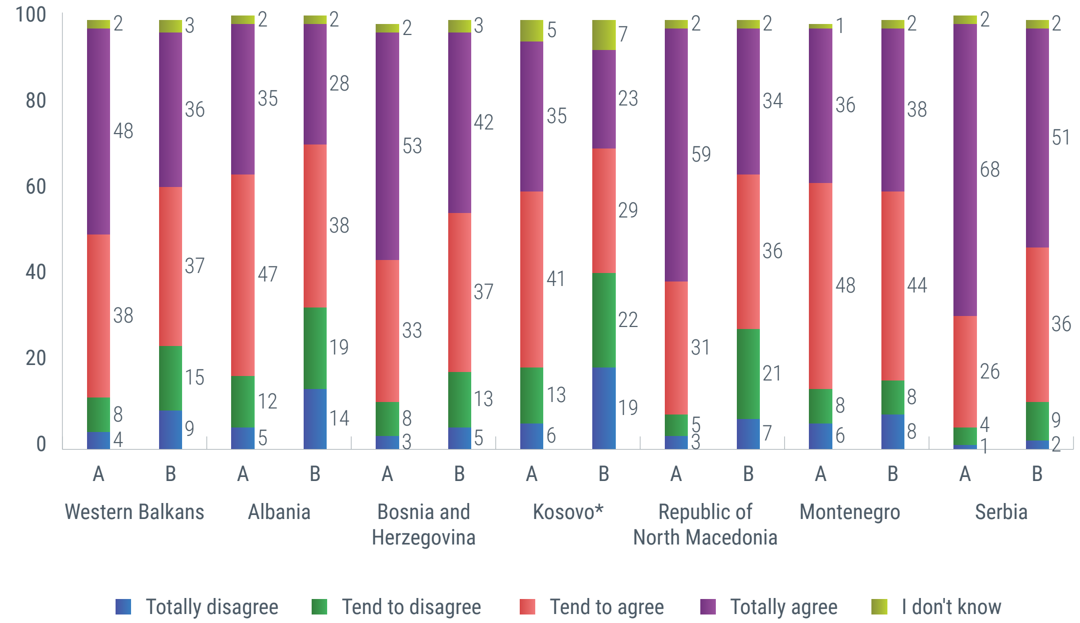
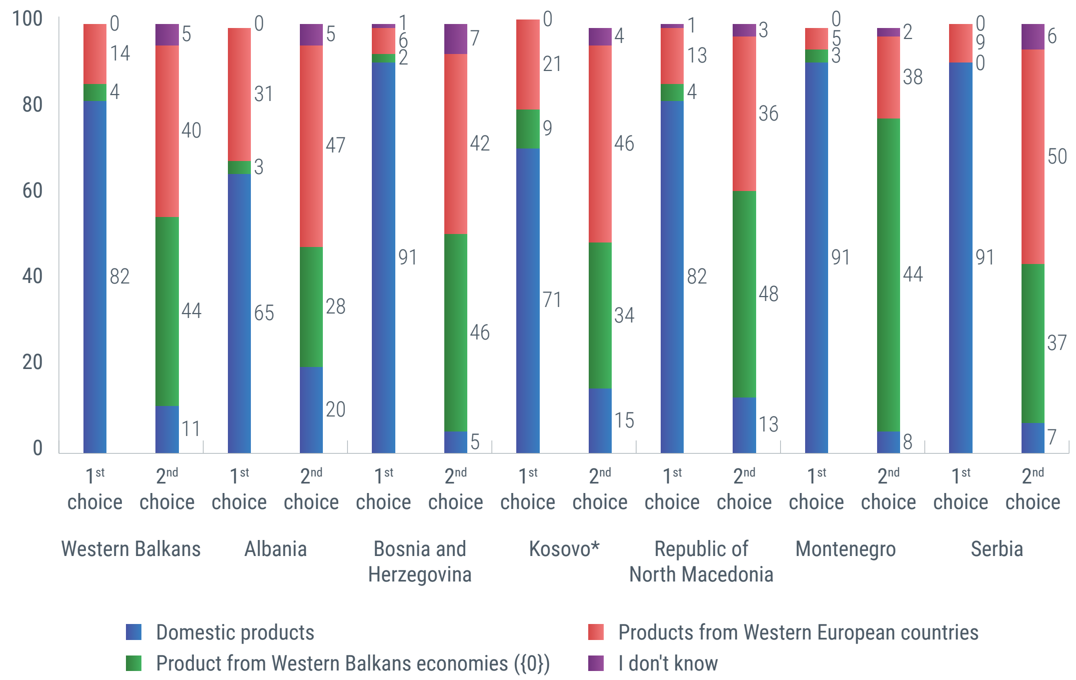



**Figure 83: If you could choose a food or beverage product from three different sources: domestic product, product from the SEE region and product from Western European countries, which one would be your first choice and which would be second?[70]**
(All respondents – N=6020, share of total, %)




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

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

Consumer confidence in domestic products remains high and is growing, both when compared to competition from the region (86%, up from 80% in 2018) as well as from the EU (73%, up from 72% in 2018). This signals a trend reversal with domestic product confidence previously dropping substantially in 2018 compared to the previous year.

Respondents in Serbia continue to convincingly lead the region in product confidence both when coming up against competition from the region (94%) and well as from the EU (87%).

**Figure 84: When purchasing products in supermarkets, how often do you look at the labels to see the country of origin?[71]**
(All respondents – N=6020, share of total, %)

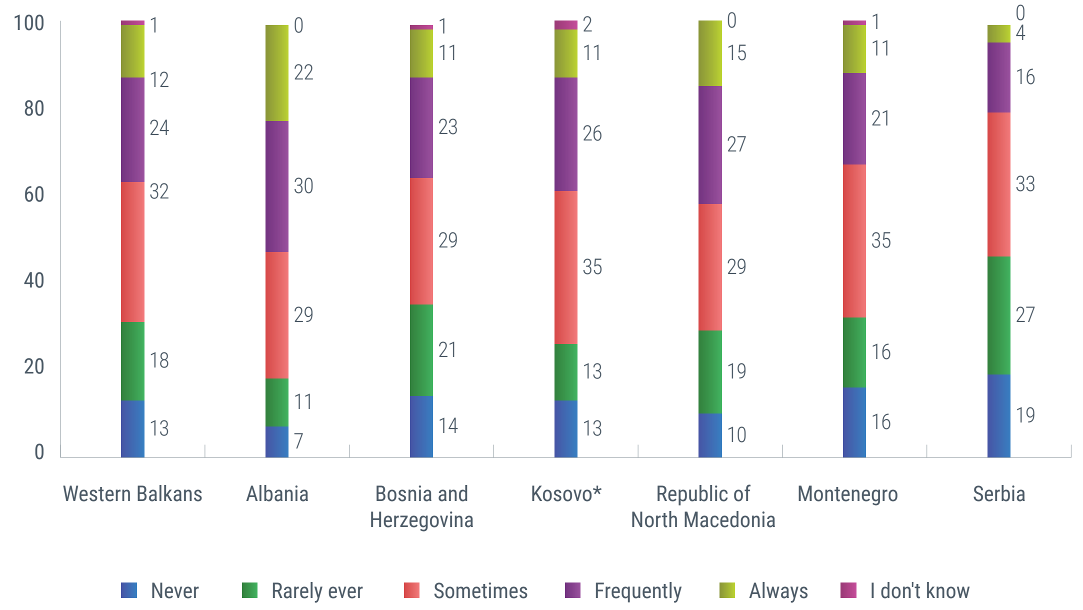
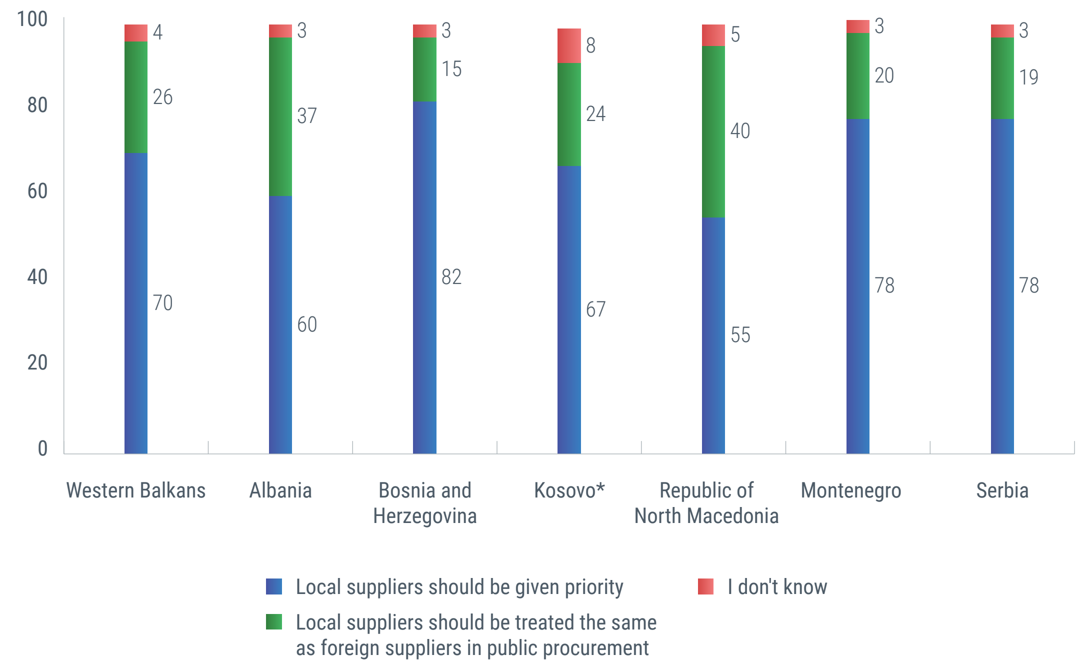



**Figure 85: When procuring products and services, should your Government give priority to local suppliers or should they be treated the same as foreign suppliers (provided price and quality is equal)?[72]**
(All respondents – N=6020, share of total, %)




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

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





Respondents in Kosovo* are least likely to consider domestic products competitive against regional (76%) and EU (52%) competition.

Respondents tend to overwhelmingly and increasingly favour domestically sourced food and beverages (86%), in keeping with a standing regional trend (+11 points from 2016). Products from the region are, interestingly, second choice, with 44%, and ahead of products from the European Union (40%). The clear bias in favour of domestic products extends across all of the region's economies, although to varying degrees with 65% of respondents from Albania displaying a domestic preference against 91% from Serbia, Montenegro and Bosnia and Herzegovina. Albania is also home to the highest proportion of respondents who favour products from Western Europe as their first choice (31%).

Respondents from Serbia are most likely to favour products from Western Europe as their second choice (50%) while in Montenegro the clear second preference is for products from Western Balkans (73%) and represents a regional high.

A growing majority of individuals in the Western Balkans tend to pay attention to the origin of products while shopping, with that number now at close to two-thirds (68%, up from 59% in 2018). Fewer than a third do so rarely or never (31%). Combined with a strong preference for domestic or Western Balkans products, this bodes well for the food and beverage industry in the region.

Interestingly, in the space of a single year, Albania has gone from the economy least bothered with country of origin (48% admitted to seldom or never checking labels in 2018) to the one most concerned with where products come from (only 18% admit to not being interested in 2018).

Shoppers from Serbia are, meanwhile, the least curious about where the products originate (46% say they do not care).

Local suppliers should enjoy preferential treatment from their home governments says 70% of survey participants, a four-point hike since 2018. Similar to last year, some 26% feel that all prospective vendors should be given a level playing field with no preference given to domestic suppliers.

A regional high of 82% in Bosnia and Herzegovina feel that domestic vendors should be treated preferentially while equitable treatment of all prospective offerors is advocated by a record 40% of respondents in North Macedonia.

# PERCEPTIONS ON TRANSPORT AND INFRASTRUCTURE

With transport infrastructure very much a long-term investment priority for the Western Balkans there are few surprises compared to the previous editions of the Barometer.

The bias towards road transport and automobiles in particular, continues to grow, alongside overall satisfaction with quality of infrastructure, at least for much of the region. Bosnia and Herzegovina is once more the region's leading critic of the quality of transport infrastructure and, consequently, road safety. Road fatalities remain at almost double the rate of the EU , necessitating rapid and decisive action by the region's governments along the lines of the EU's Policy Orientations on Road Safety 2011-2020 that contributed to a sharp decline in the number of road fatalities between 2010 and 2018.[73]

Some steps have been taken in order for the region to close the gap to the EU, to include developing a three-year road safety inspection regional plan, with technical advice and funding from the European Commission's Technical Assistance for the Connectivity Agenda for the Western Balkans (CONNECTA). The resulting improvements to road networks will be funded through the Western Balkan Investment Framework. Nonetheless, more investment will be needed in better enforcement of traffic rules, improved driver training, safer technologies, better emergency response and protection of vulnerable road users, among others.

A comfortable majority of the region's travellers did so by using the automobile and to a greater extent than recorded in 2018 (60%, from 54%). Meanwhile, a quarter travelled by bus with only 2% flying to their destination. Bus travel is once more down although to a lesser degree than in previous years (down to 25% from 39% in 2016), indicating that more people in the region are now able to afford automobiles. As in 2018, 12% of those surveyed did not leave their place of residence at all over the past year.

Once more, Bosnia and Herzegovina has most respondents travelling by automobile (71%) while in Albania fewer than half of the population left their place of residence by car. Albania also has the most respondents travelling by bus (35%), although to a far lesser extent than in 2018 (49%), as well as, interestingly, most air travellers in the region (6%).

The number of non-travellers in Kosovo* has grown by a significant six points since 2018 and now stands at 22%, a regional high.

Close to two-thirds of the region's respondents are happy with the quality of transport infrastructure in their economies (61%). This represents a significant upturn in respondent satisfaction since 2018, in particular with those who describe their economy's state of transport infrastructure as either very good or excellent. Still, some 38% of the region's respondents remain unhappy (down by three points since 2018).

Once more, Bosnia and Herzegovina is home to most dissatisfied travellers in the region with 57% unhappy with the quality of infrastructure in their economy (down by two points since 2018), reflective of a slow pace at which significant transport upgrades are taking place in that economy.

Figure 86: Which mode of transport did you most often use when travelling outside of your place of residence in the past 12 months?[74]
(All respondents – N=6020, share of total, %)

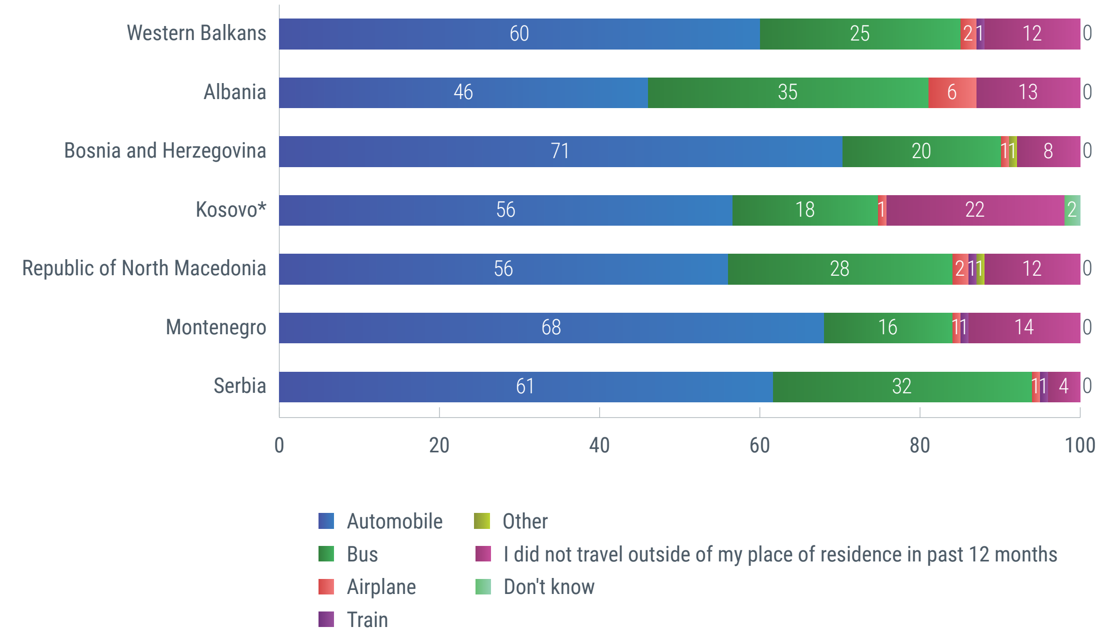



Figure 87: How do you estimate the quality of transport infrastructure and connections within your economy?[75]
(All respondents – N=6020, share of total, scale from 1 to 5, %)

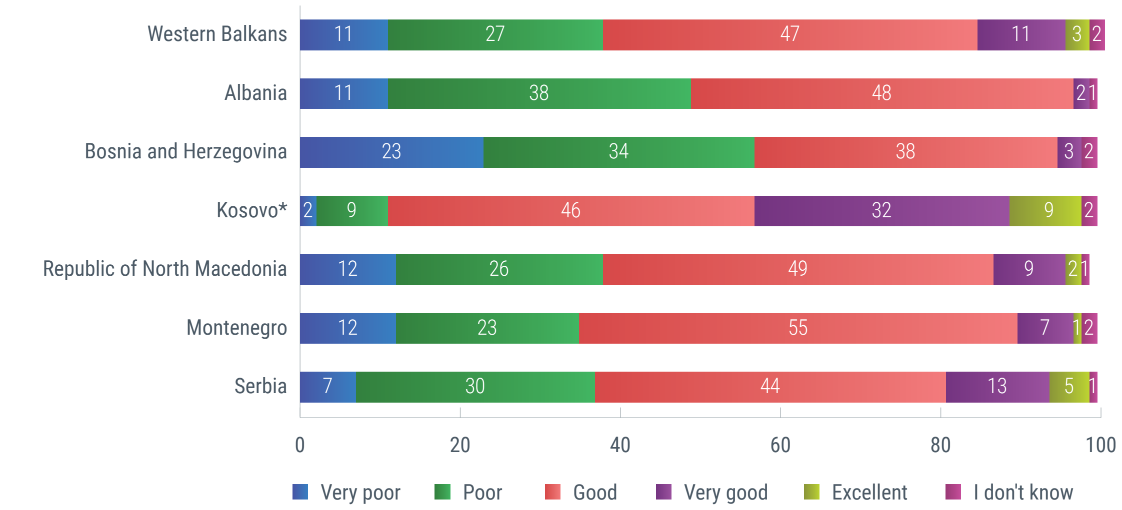
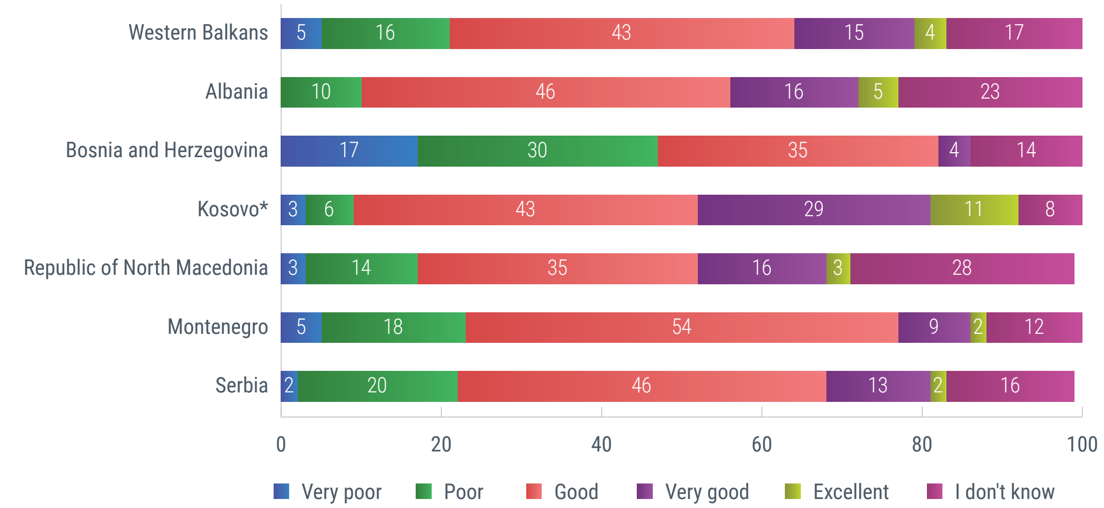



Figure 88: How do you estimate the quality of transport infrastructure and connections within the SEE region?[76]
(All respondents – N=6020, scale from 1 to 5, share of total, %)




73 According to the EC, in 2017, there were 81 deaths on Western Balkan roads per million inhabitants while the latest figure for the EU is 49.

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

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

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

**Figure 89: Would you agree that travelling by road in your economy is safe?[77]**
(All respondents – N=6020, scale 1 to 4, share of total, %)

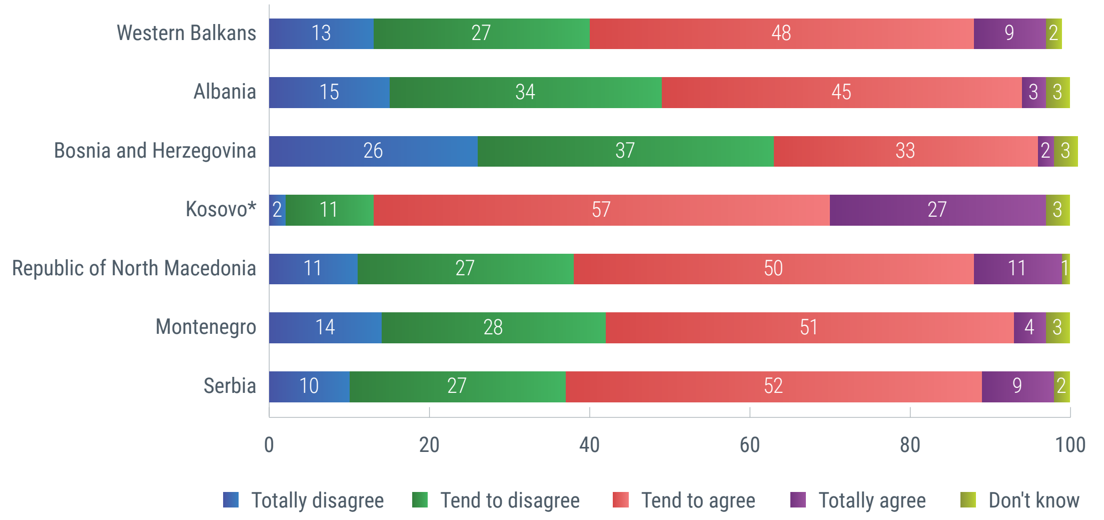
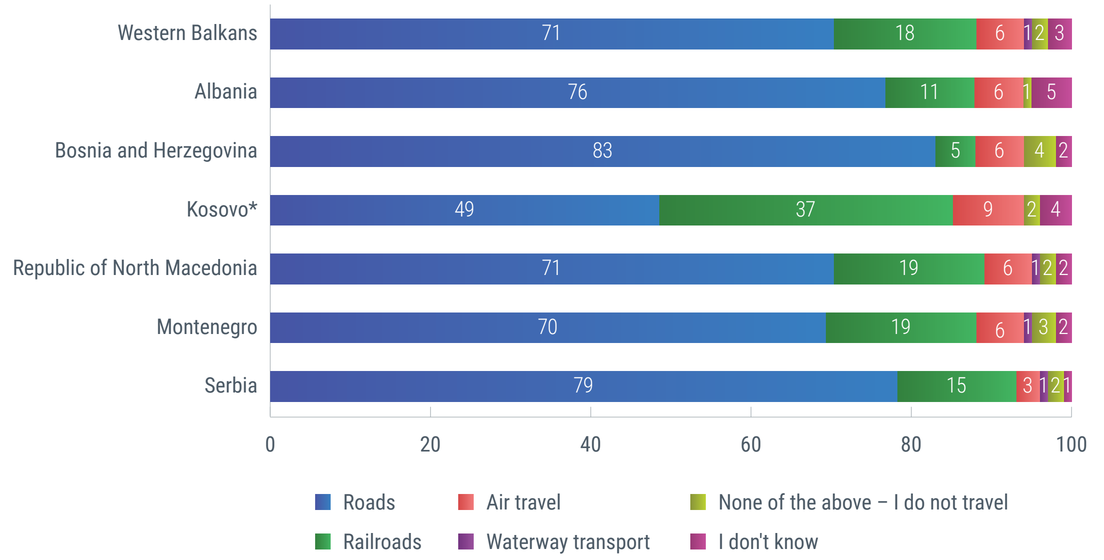



**Figure 90: In your opinion, which passenger transport mode improvements would have the highest beneficial impact on your travelling?[78]**
(All respondents – N=6020, share of total, %)




Meanwhile, Kosovo* once more leads the satisfaction rankings with an impressive 87% happy with the quality of their economy's transport infrastructure.

As with economy-level transport infrastructure, there is growing satisfaction with regional transportation and connections within the Western Balkans. Some 62% of all respondents positively assess the state of regional transport connections, up from 57% in 2018.

Interestingly, and in keeping with a long-standing trend, there are far fewer dissatisfied respondents than at economy level, 21% versus 38%, although the satisfaction rates are rather similar, 62% versus 61%. At the same time, the number of neutral respondents remains high, at 17%, largely a result of their lack of exposure to regional transport infrastructure.

Viewed by economy, Kosovo* is once more home to the most satisfied group of respondents with 82% happy with the state of regional transport connections.

Meanwhile, close to half of all respondents from Bosnia and Herzegovina are unhappy with regional transport ties (47%), closely mirroring their dissatisfaction at economy-level. Considering the widely divergent views of regional infrastructure, it is likely that previously and strongly held views of transport networks in own economy heavily influence respondent opinion here as well. Some differences in regional travel patterns by respondents from the two economies at the extremes may also help account for the discrepancy.

The roads in the region's economies are safe, according to a majority of survey respondents. There is a sharp decline in the number of concerned survey participants, with 40% expressing reservations about the safety of road travel in their economies, down from 47% in 2018.

Quality of road infrastructure clearly has a substantial bearing on perceptions of road safety since respondents from Bosnia and Herzegovina and Kosovo* feel most and least worried about travelling by road, respectively. As noted above (see Figure 89), these are also the two economies least and most satisfied with the quality of transport infrastructure at home.

With close to two-thirds of the respondent population in Bosnia and Herzegovina deeming road travel unsafe (63%), any broader improvements in perceptions of road safety across the region have not translated into any gains for this economy, surely a major source of concern for its government.

A significant majority of respondents view road improvements as the most beneficial form of transport upgrade (up to 71% from 66% in 2018). The past year has also seen an increase in stated support for investment in railways (up to 18% from 13% in 2018) and air travel (up to 6% from 4% in 2018).

Meanwhile, the percentage of respondents not travelling has dropped to just 2% from 12% in 2018.

In keeping with their clearly stated concerns over transport infrastructure and road safety, respondents from Bosnia and Herzegovina overwhelmingly support investment in roads (83%), while in Kosovo* more than a third prioritise railways (37%). Interestingly, Kosovo* has also recorded the most support for investment in air travel (9%).

77 The figures might not add to 100% due to rounding.
78 The figures might not add to 100% due to rounding.

# ATTITUDES TOWARDS CLIMATE CHANGE AND ENERGY

There is growing awareness of the risks posed by climate change with an overwhelming majority describing it as a serious threat, likely a direct consequence of another record-breaking year for air pollution. With poor air quality the biggest environmental health risk in Europe, the situation is especially hazardous for the residents of Western Balkans.

Encouragingly, there is growing awareness of the threat posed by climate change with three quarters describing it as either somewhat or very serious – a cumulative increase of nine points from last year. Respondents are increasingly convinced of the need for a whole-of-society approach in order to tackle the challenges posed by climate change, as a growing majority feels that responsibility for addressing environmental issues must be shared by all stakeholders, public and private.

More people are stepping up to assume responsibility for mitigating the effects of environmental degradation; a substantial majority of individuals surveyed declare themselves willing to pay more for environmentally friendly products.

Buying locally produced food is the dominant mitigation measure employed by the region' residents, followed by cutting down on consumption of disposable items and recycling. Importantly, only 15% have acted to cut energy losses in their homes through better insulation, a critical consideration if the region is to reduce its seasonal winter pollution.

There is growing awareness of the threat posed by climate change with 74% describing it as either somewhat (33%) or very serious (41%) – a cumulative increase of nine points from last year. Interestingly, respondents describing climate change as a very serious problem account for much of the increase since 2018 with a ten-point boost in membership.

The rapid fluctuations in interest in climate change by the region's population are once more evident and are clearly the result of acute weather events unfolding in the course of the year surveyed; 2019 saw record high levels of pollution across many of the cities in the region. Meaningful action, however, requires prolonged and intensive engagement by the overwhelming majority who are fully aware of climate change's impact on life in their communities.

Serbia is the region's most climate-concerned economy with 85% of respondents expressing a degree of concern regarding the impact of climate change. The Republic of North Macedonia is in close second with 84%.

Meanwhile, Kosovo* has the region's smallest population of individuals concerned over climate change with 51%, while Montenegro, last year's leader in climate change denial, record a remarkable hike in the number of respondents anxious over the prospect of climate change (+28 points).

Three quarters of the region's respondents see pollution as a serious problem in their economies, a ten-point increase on last year. Meanwhile, a quarter view pollution as not overly serious or at all problematic (18% and 7%, respectively). While the level of awareness of the harmful effects of pollution is evident (or something like this),),growing the fact that a large segment of population does not see it as a problem is concerning when facts are considered; a 2019 report by UN Environment states that "air pollution is directly responsible for up to one in five premature deaths in 19 Western Balkan cities".[81] The same publication finds that "people living in the Western Balkan cities studied lose up to 1.3 years of life to air pollution", on average.[82]

Albania and the Republic of North Macedonia have the highest proportion of respondents concerned over pollution (83% for both) which, at least in large part, tallies with pollution data for the region; Tetovo, in the Republic of North Macedonia, has the region's highest mortality rate attributable to the effects of pollution (19%).[83] Once more, Montenegro is least concerned with pollution, although the number of pollution-aware respondents in this economy has grown significantly in the space of single year (up to 64% from 47% in 2018). Tackling ambient air pollution in the region is both an environmental and public health priority that must be urgently pursued, with comprehensive coordination by all the economies, considering that it is an issue close to the top of the regional agenda for the Western Balkans.

There is growing awareness of the need for a whole-of-society approach in order to tackle the challenges posed by climate change, as 42% feels that responsibility for addressing this issue must be shared by all stakeholders, public and private. This also represents a ten-point hike in this category across the space of one year.

Governments and businesses are tied for second with 28% each with regional authorities in third with 20%. Meanwhile, 15% of respondents hold NGOs primarily responsible as one out of ten individuals hold themselves chiefly accountable for countering the effects of climate change.

**Figure 91: Do you consider climate change to be a problem?[79]**
(All respondents – N=6020, share of total, %)

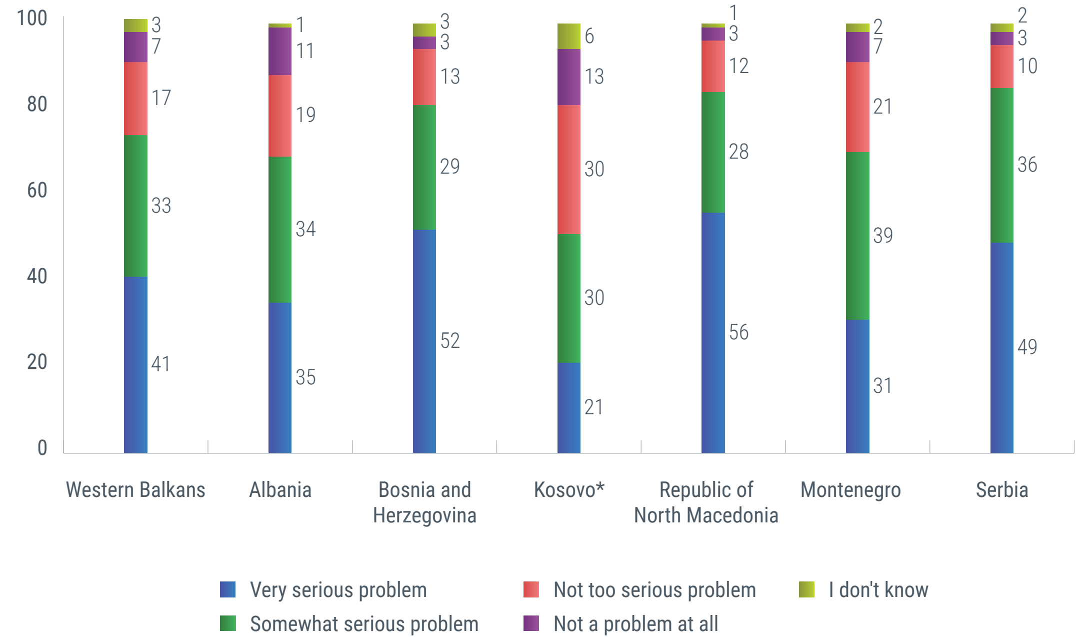
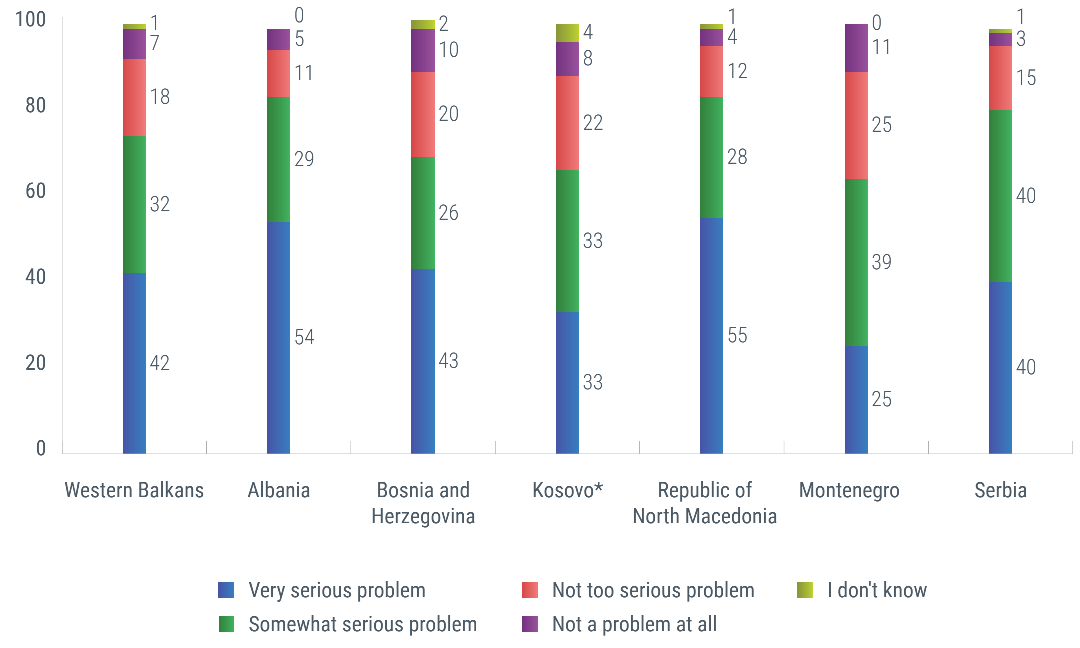



**Figure 92: Do you consider pollution to be a problem in your place of living?[80]**
(All respondents – N=6020, share of total, %)




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

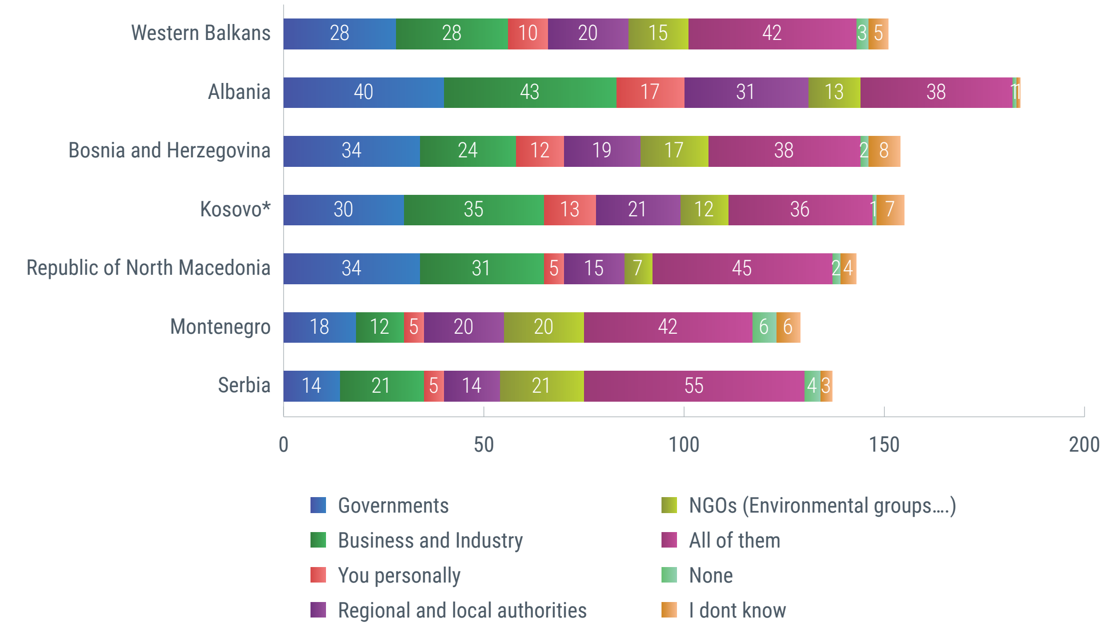
80 The figures might not add to 100% due to rounding.

81 https://www.unenvironment.org/news-and-stories/press-release/air-pollution-responsible-one-five-premature-deaths-19-western

82 Ibid.

83 Ibid.

**Figure 93: In your opinion, who within your economy is responsible for tackling climate change?**
(All respondents – N=6020, multiple answers, %)

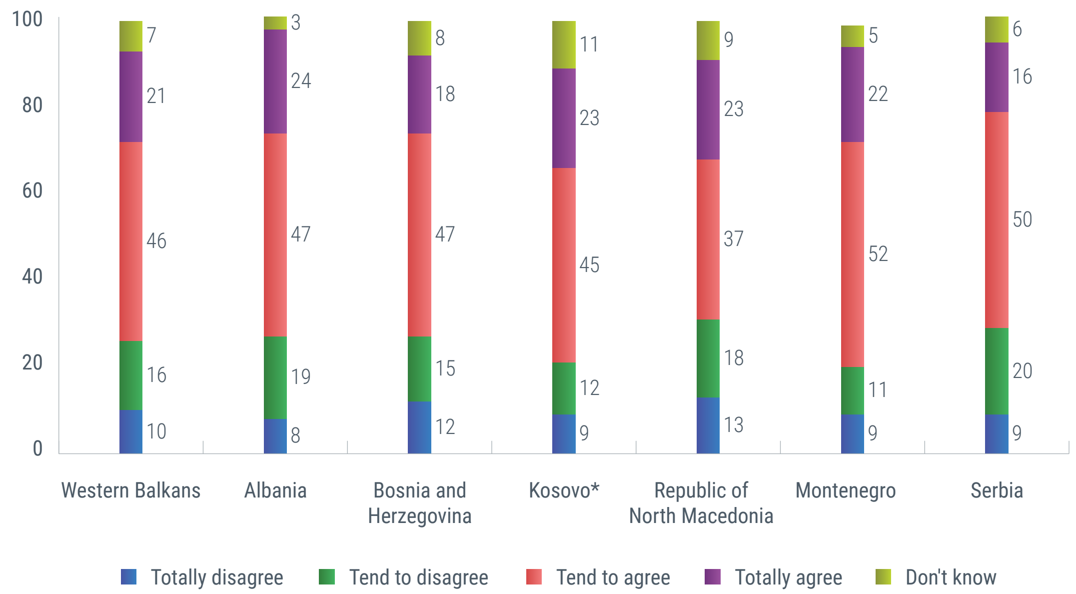



Serbia champions an integrated response by all stakeholders with a regional high of 55%. At the same time, respondents in Albania are most likely to hold their government, businesses and local authorities to account, with 40%, 43%, and 31%, respectively. Interestingly, Albania is also home to the largest group of citizens who hold themselves responsible for countering climate change (17%).

Respondents from Serbia are most likely to attribute primary climate change adaptation and mitigation responsibility to non-governmental actors (21%).

A substantial majority of individuals surveyed declare themselves willing to pay more for environmentally friendly products (67%), an eight-point increase on 2018. Just over a quarter of respondents

**Figure 94: Do you agree with the following statement: I am ready to buy environmentally friendly products even if they cost a little bit more.[84]**
(All respondents – N=6020, scale from 1 to 4, share of total, %)




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





(26%) are not prepared to pay extra even if it will help the environment.

Once more, Montenegro leads the region with the number of environmentally friendly shoppers (74% and an 11-point increase on 2018). Meanwhile, shoppers in the Republic of North Macedonia are least likely to buy environmentally friendly products at a premium (60%).

Buying locally produced food is the dominant mitigation measure employed by the region' residents (46%), followed by cutting down on consumption of disposable items (39%). Recycling is the third most common action taken by individuals in the Western Balkans in order to reduce their environmental impact (36%). Purchasing energy efficient appliances is employed by close to a quarter of all respondents (23%) while 15% have acted to cut energy losses in their homes through better insulation.

The same number of people, however, admits taking no environmentally motivated decisions over the past year (15%). Encouragingly, there has been a ten-point drop in the number of respondents across this category since 2016, indicating an increased awareness of the need to take personal responsibility when it comes to tackling the ongoing climate crisis.

In terms of other notable trends, the proportion of individuals buying locally sourced food has grown by an impressive 12 points since 2018, while the number of people avoiding single-use items has grown by an additional four points; this is also the margin by which the recycling group has grown since last year's edition of the Barometer (+4).

The number of respondents using environmentally sound modes of transport is holding at around the tenth of the overall population (10% for 2019, from 12% in 2018).

**Figure 95: Which of the following actions have you taken, if any? (SEE region)**
(All respondents – N=6020, share of total, %)

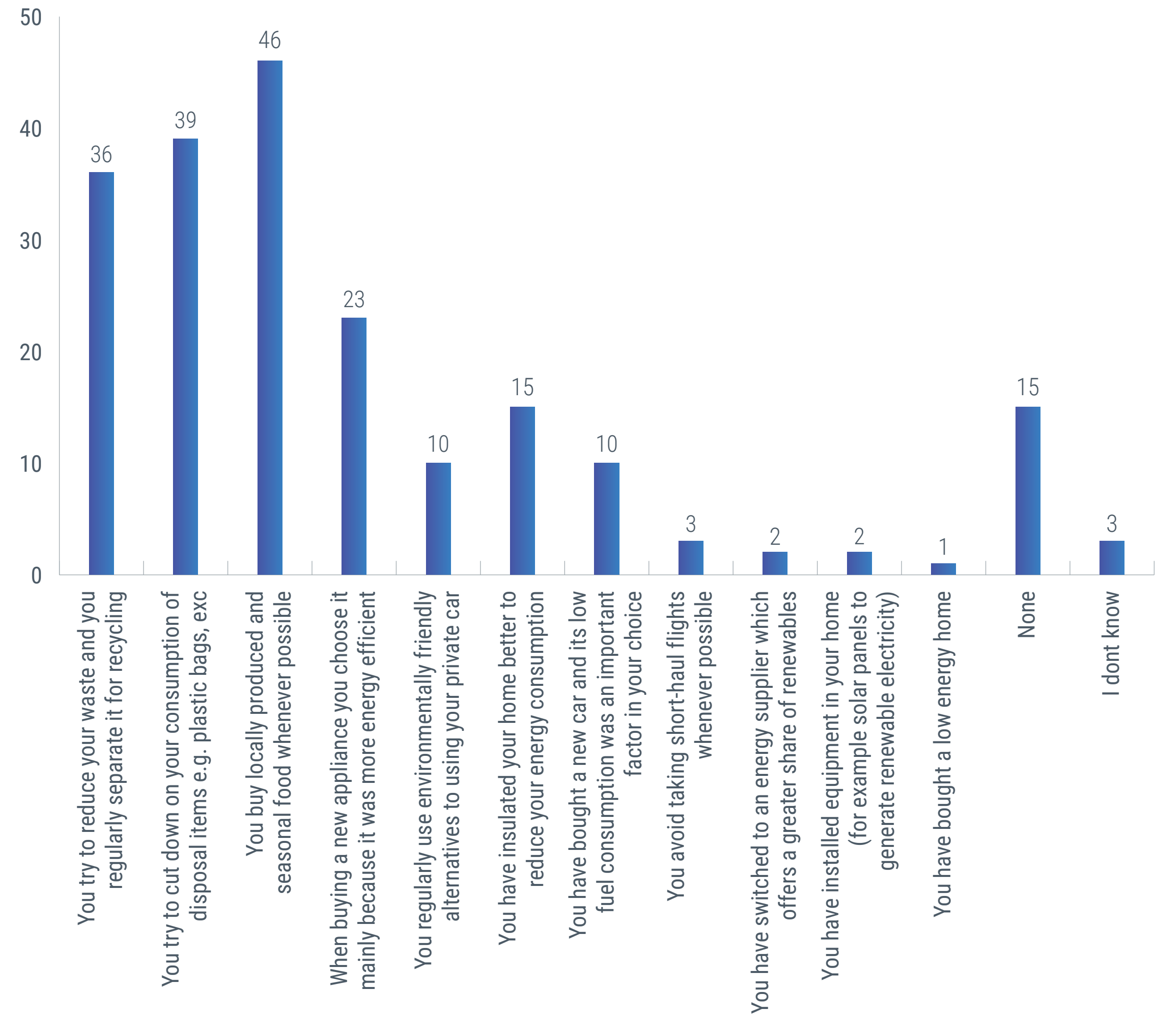


*Table 9: Which of the following actions have you taken, if any? (By economies)*

*(All respondents – N=6020, multiple answers, %)*

| Action | Albania | Bosnia and Herzegovina | Kosovo* | Republic of North Macedonia | Montenegro | Serbia |
|---|---|---|---|---|---|---|
| You try to reduce your waste and you regularly separate it for recycling | 33 | 38 | 42 | 27 | 41 | 37 |
| You try to cut down on your consumption of disposal items, e.g. plastic bags, etc. | 56 | 40 | 22 | 32 | 30 | 54 |
| You buy locally produced and seasonal food whenever possible | 72 | 54 | 23 | 31 | 49 | 49 |
| When buying a new appliance, you choose it mainly because it was more energy efficient | 39 | 14 | 14 | 23 | 26 | 20 |
| You regularly use environmentally friendly alternatives to using your private car | 8 | 7 | 8 | 15 | 10 | 14 |
| You have insulated your home better to reduce your energy consumption | 8 | 16 | 14 | 18 | 18 | 18 |
| You have bought a new car and its low fuel consumption was an important factor in your choice | 5 | 12 | 7 | 7 | 13 | 13 |
| You avoid taking short-haul flights whenever possible | 1 | 2 | 8 | 2 | 5 | 2 |
| You have switched to an energy supplier which offers a greater share of renewables | 0 | 1 | 4 | 2 | 2 | 1 |
| You have installed equipment in your home (for example solar panels to generate renewable electricity) | 2 | 1 | 3 | 8 | 1 | 0 |
| You have bought a low energy home | 1 | 0 | 2 | 1 | 1 | 1 |
| None | 5 | 11 | 28 | 21 | 14 | 12 |
| I don't know | 0 | 3 | 6 | 4 | 1 | 1 |

When it comes to environmental mitigation measures broken down by economy, recycling is particularly prominent in Kosovo* and Montenegro (42% and 41%, respectively), while Albania and Serbia lead the field in the fights against single-use items (56% and 54%).

Albania is also a runaway leader in the region when it comes to locally sourced produce with an incredible 72% of the respondent population buying locally grown food; this is also the economy with the greatest number of consumers who buy energy efficient appliances (39%). The Republic of North Macedonia, Montenegro and Serbia are joint top when it comes to home insulation with 18%. The Republic of North Macedonia is also convincingly the economy with the greatest interest in renewables with 8% installing equipment to generate solar and/or other types of renewable energy.

Meanwhile, with 28%, Kosovo* is home to most respondents who admit to not taking any environmental mitigation action over the past year.

# PERCEPTIONS ON PUBLIC INSTITUTIONS AND SERVICES

Although there has a slight uptick in performance ratings of the region's governments in terms of speed and effectiveness of service delivery, whatever good news this section brings is greatly overshadowed by the plummeting confidence of the region's population in the rule of law system.

Some two-thirds of the region's residents now feel that laws are not applied effectively (+7 points since 2018), while an even greater majority questions the impartiality of judicial and law enforcement institutions (76%, and up from 70% in 2018). The figures for Bosnia and Herzegovina make for particularly grim reading with the economy particularly disillusioned with the work of its judicial and law enforcement institutions and agencies.

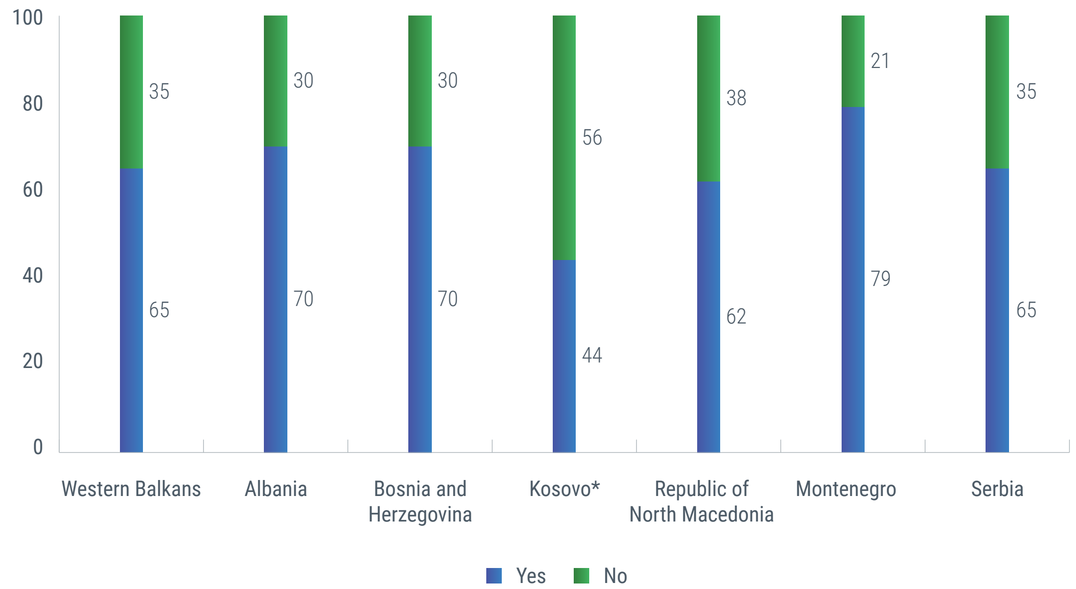
Strengthening rule of law must be made an absolute priority, both by governments and international actors working in the region, for a myriad of reasons, including, but not limited to: 1) curbing organised crime and drug trafficking[85]; 2) managing illegal migration; 3) decreasing flow of skilled labour from the region due to concerns over corruption and state capture; and 4) improving the business environment as a boon to prospective foreign investors. Ultimately, the trust, or the lack thereof, in the rule of law system will greatly influence the ability of the region's economies to effectively accomplish any of these lofty, but necessary, targets.

Close to two-thirds of all respondents had contact with public service providers in the course of the past year, a significant 12% surge compared to 2018. Montenegrin respondents were significantly more likely to engage with public institutions (79%) while respondents in Kosovo* were least likely to solicit public services (44%).

Somewhat predictably, considering the general push towards decentralisation as well as the fact that most services are already provided at community level, local governments were sought out more often than their central level counterparts (69% vs. 65%), albeit not to the extent perhaps anticipated.

The region's two smallest economies, Kosovo* and Montenegro, are also the only two where central rather than local level institutions were predominantly engaged by respondents, as smaller territories tend to benefit less from decentralisation.

Figure 96: Have you had contact with public services in the last year?
(All respondents – N=6020, share of total, %)




85 The UN estimates that some 28 billion USD in heroin and opium makes its way into Europe via the Western Balkans every year, available at https://www.unodc.org/documents/data-and-analysis/Studies/IFF_report_2015_final_web.pdf





Figure 97: Were those central or local government services?
(Those having contact with public services – N=3970, multiple answers, %)

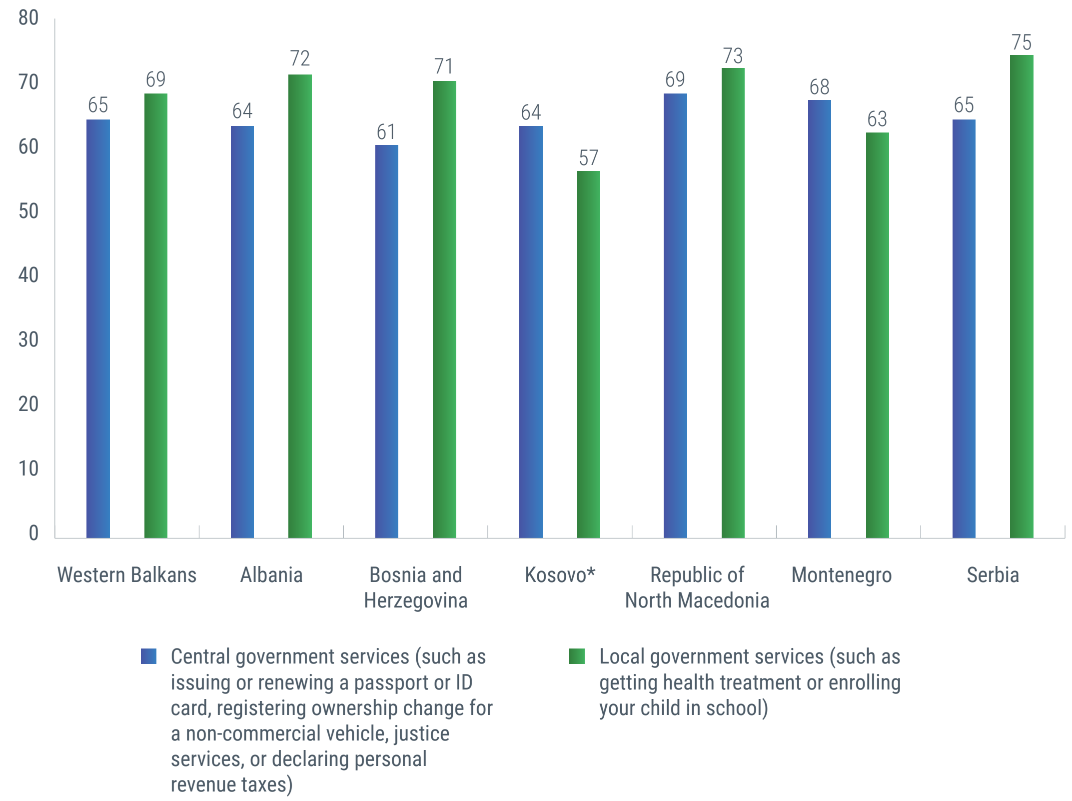
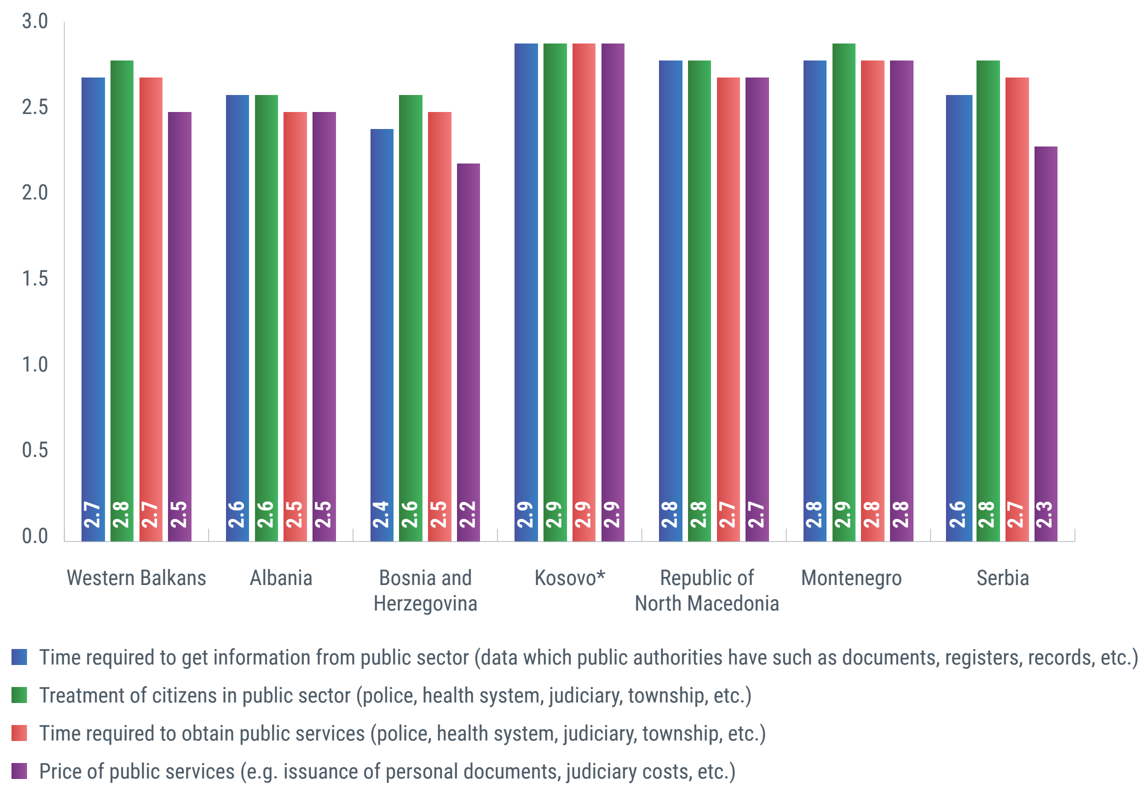



Figure 98: How would you grade the following issues:
(All respondents – N=6020, scores from 1 to 5, share of total, mean)



While the overall performance of the region's governments leaves much to be desired, there is, nonetheless, a slight upturn in ratings across all categories examined.

Treatment of citizens by public service providers is now the highest ranked feature of government performance with a mean of 2.8, up from 2.6 in 2018 (on a 1 to 5 scale). The timeliness in both service delivery and provision of information by government institutions are the two next best assessed categories (both at 2.7) while the price of services rendered is viewed least favourably by a majority of survey respondents.

As last year, Kosovo* and Montenegro have the region's most appreciated governments, with Bosnia and Herzegovina ranked last and also the only regional economy to experience negative growth since last year.

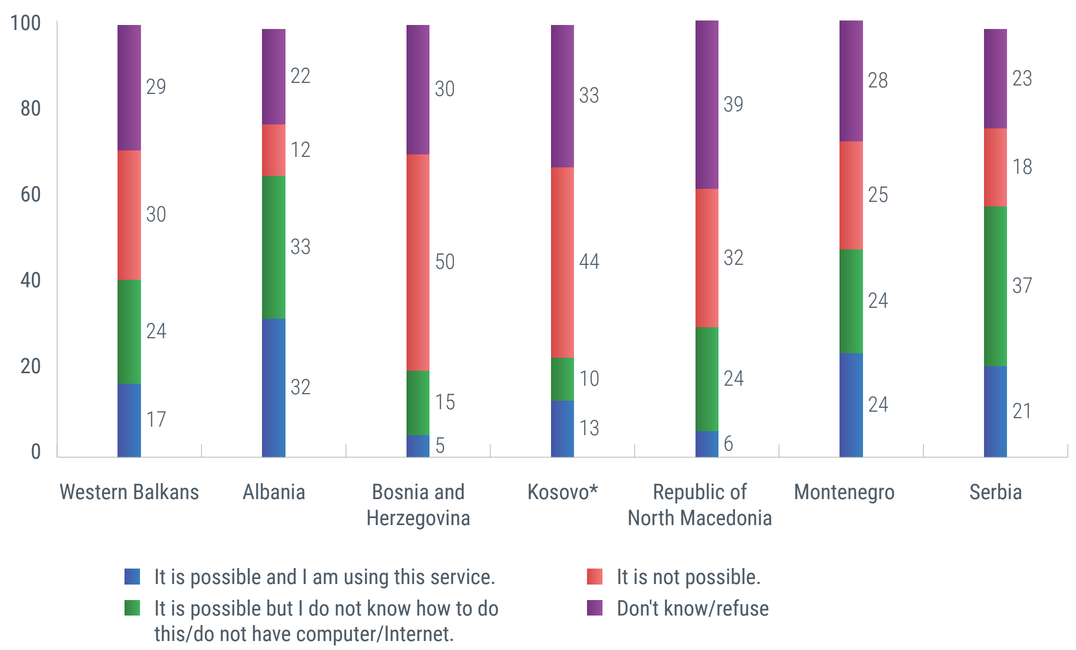
*Table 10: How would you grade the following issues? (Overview 2014-2019)*

*(All respondents - N=6020, scores from 1 to 5, mean)*

| | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 |
|---|---|---|---|---|---|---|
| Treatment of citizens in public sector | 2.3 | 2.4 | 2.5 | 2.7 | 2.6 | 2.8 |
| Time required for obtaining public services | 2.4 | 2.5 | 2.6 | 2.8 | 2.6 | 2.7 |
| Time required for getting information in public sector | 2.4 | 2.4 | 2.6 | 2.7 | 2.5 | 2.7 |
| Price of public services | 2.2 | 2.2 | 2.4 | 2.5 | 2.4 | 2.5 |

After a brief regression in ratings in 2018, the region is back on an upward trend evident since the inaugural year of the Barometer, showing a steady rise across all categories surveyed.

**Figure 99: Is it possible to get your personal documents (birth certificate, citizenship, etc.) or permits or any other document - online?[86]**
(All respondents – N=6020, share of total, %)




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





**Figure 100: Do you agree with the following statements? (SEE region) A - Requests for information held by a government agency are granted in timely manner; B - The information provided by a government agency is pertinent and complete; C - Requests for information by a government agency are granted at a reasonable cost[87]**
(All respondents – N=6020, scale from 1 to 4, share of total, %)

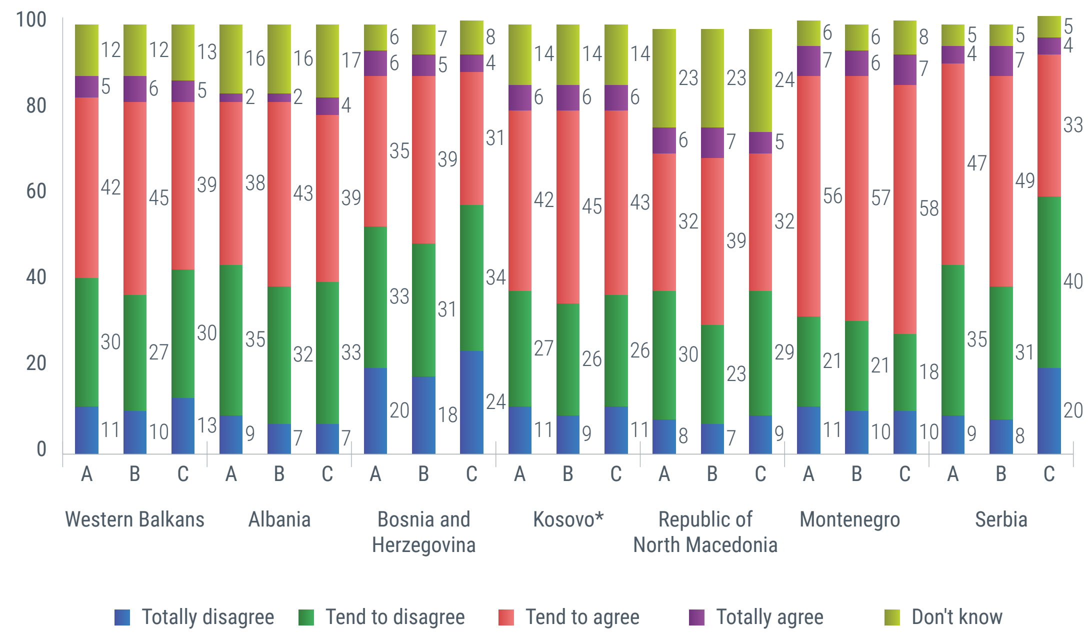
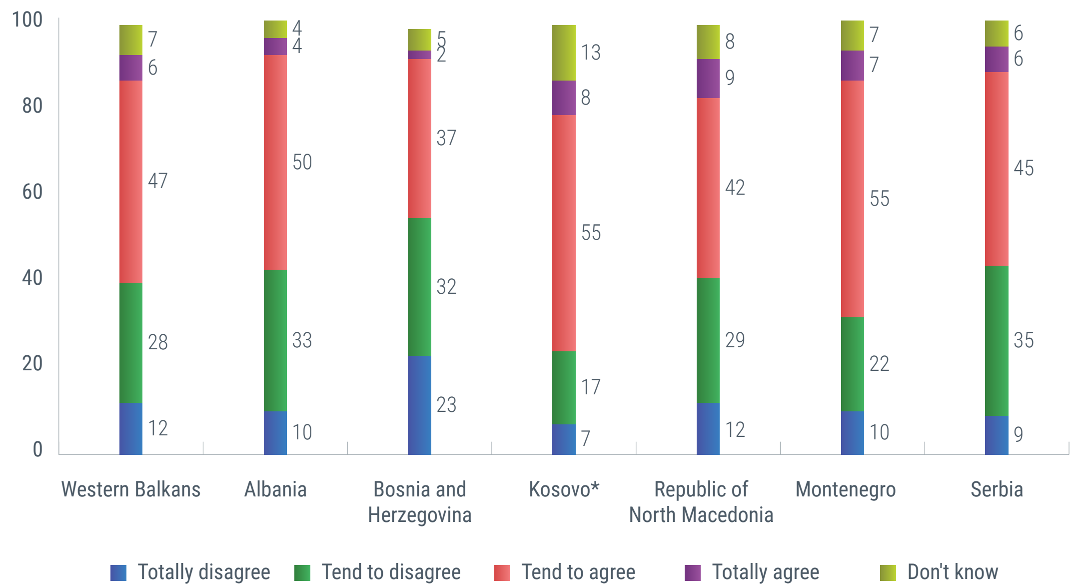



**Figure 101: Do you agree with the following statement: (SEE region) The administrative procedures in public institutions are efficient[88]**
(All respondents – N=6020, scale from 1 to 4, share of total, %)




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

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

While incrementally shrinking, the number of people without access to, or knowledge of, government online services remains substantial for most of the region. At the Western Balkans level, a significant majority are either unable to access said services because they are not available in their economy (30%) or do not have the necessary knowledge to feel sufficiently informed to provide an answer when asked (29%). At the same time, only 17% are using online public services while slightly fewer than a quarter report not having the necessary tools or the knowledge to access available services (24%). The rate of use for E-government services varies greatly by economy. In Albania, close to a third of all respondents use online public services while a slightly greater number acknowledge availability but report difficulties in accessing said services due to lack of knowledge or equipment (33%). This indicates both a high level of coverage with E-government services and a comparatively low level of technological advancement at household level. At the other end of the scale, the number of people using E-government services in Bosnia and Herzegovina has decreased since last year and is now 5%, a regional low.

As last year, a slight majority of respondents feel that government agencies provide the requested information in a timely fashion (47%), while 41% disagree. At the same time, the appropriateness and completeness of information provided is rated positively by 51% with 37% unhappy with the quality of services rendered. Finally, 44% are happy with the cost of service provided while 43% disagree.

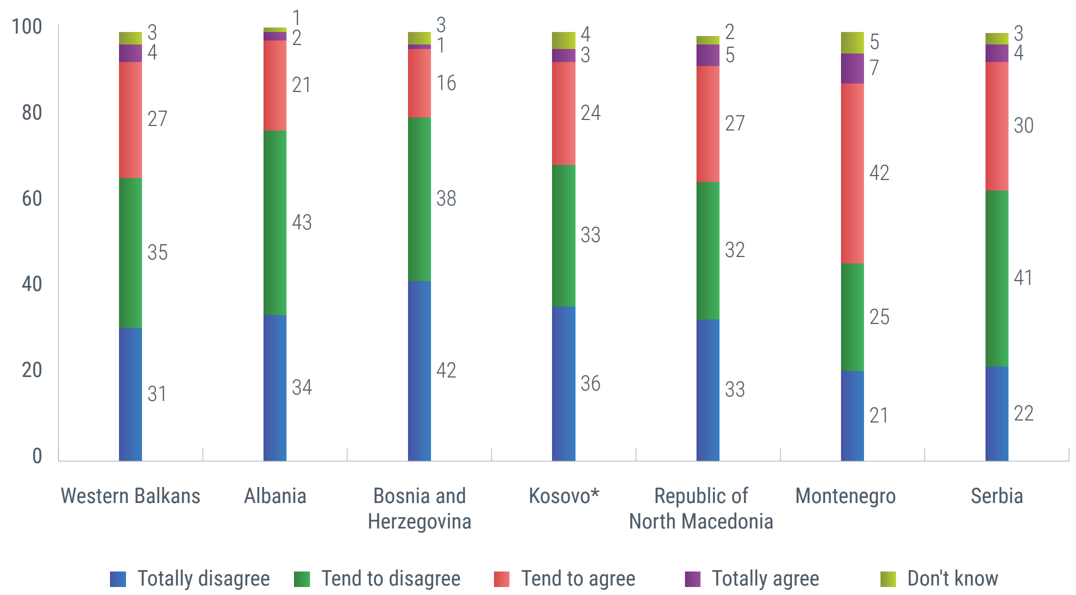
The price of services delivered by public institutions has clearly caused some consternation within the respondent population in the course of 2019 as it has become an aspect of government performance deemed unsatisfactory by most respondents across the three areas surveyed. Other than that, however, there are no notable discrepancies compared to last year's Barometer.

In terms of the region's economies, Bosnia and Herzegovina is the only one where unhappy respondents outnumber happy ones across all three categories of government performance. Meanwhile, Montenegro is once more the economy most satisfied with the functioning of its government; some two-thirds of all respondents are happy with the work of their government across all three categories.

More than half of all respondents agree that the administrative procedures in their economy are efficient (53%) while 40% disagree. There is an incremental but noticeable trend of growing satisfaction with government efficiency over a number of years with the cumulative improvement since 2014 amounting to 20 points. Bosnia and Herzegovina is again least satisfied with government performance with only 39% of happy respondents.

While government performance continues to enjoy a surge in public approval, the trust in rule of law institutions has deteriorated further in 2019. Some two-thirds of the region's residents now feel that laws are not applied effectively (+7 points since

**Figure 102: Do you agree with the following statement (SEE region): The law is applied and enforced effectively[89]**
(All respondents – N=6020, scale from 1 to 4, share of total, %)




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

**Figure 103: Do you agree with the following statement (SEE region): The law is applied to everyone equally[90]**
(All respondents – N=6020, scale from 1 to 4, share of total, %)

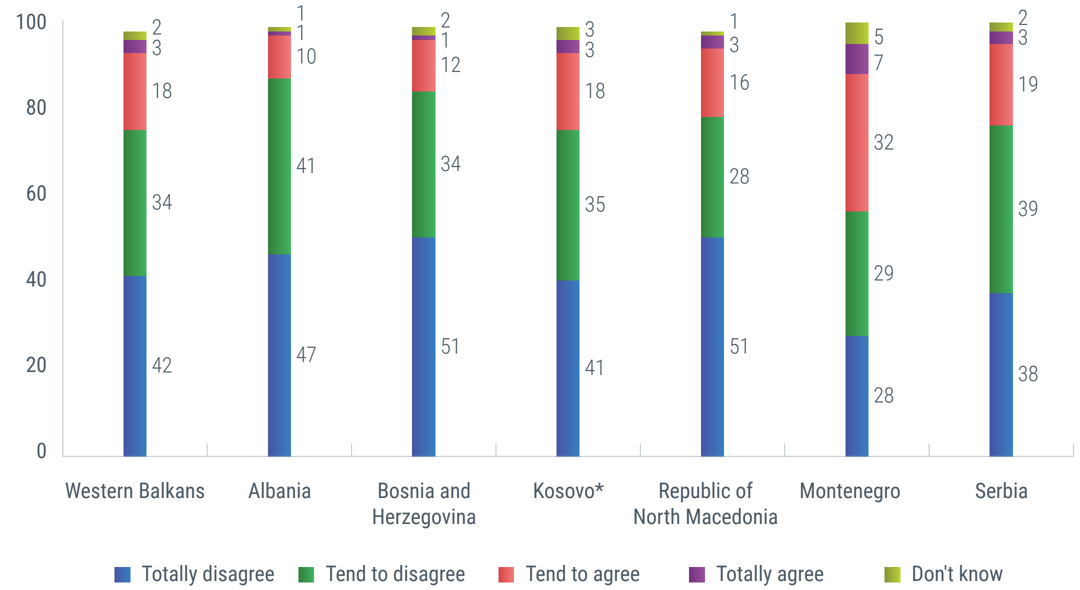
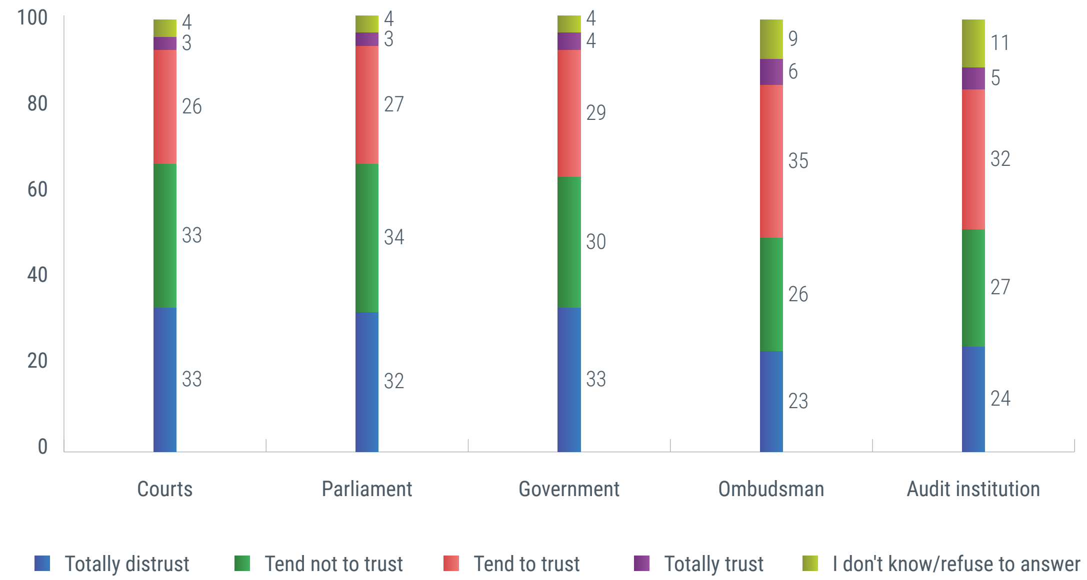



**Figure 104: How much trust do you have in certain institutions? (Western Balkans region) A – Courts and judiciary; B – Parliament; C – Government; D – Ombudsman; E - Supreme audit institution[91]**
(All respondents – N=6020, scale from 1 to 4, share of total, %)



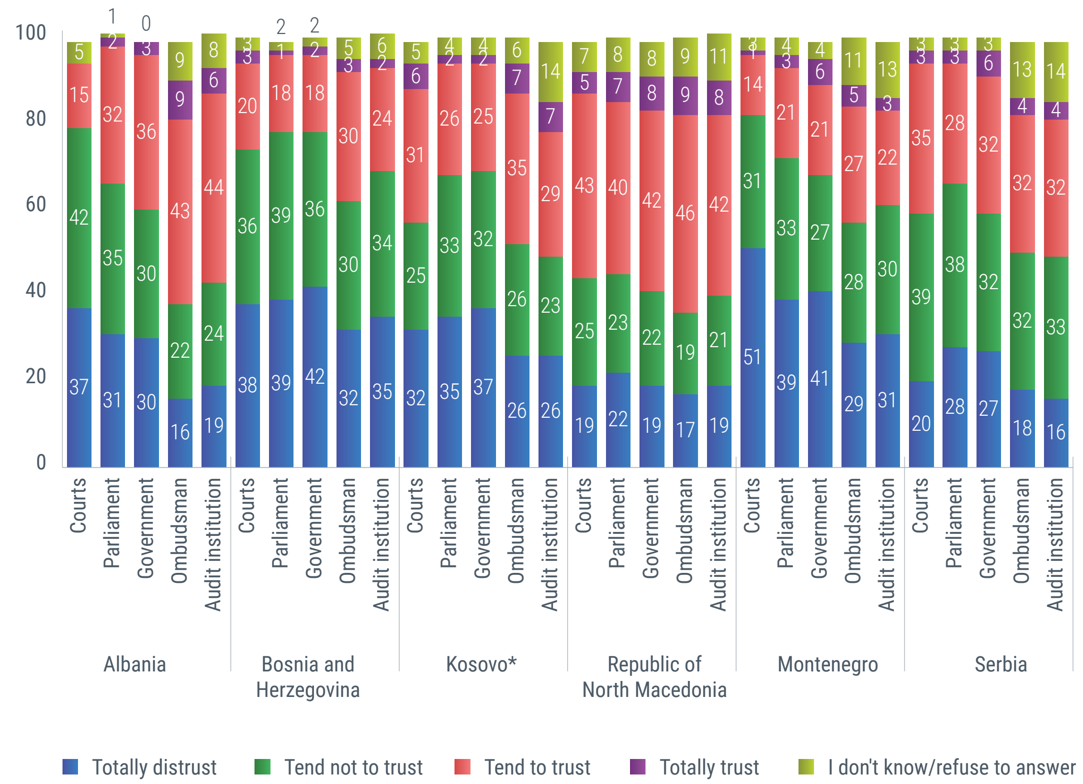

2018), while an even greater majority questions the impartiality of judicial and law enforcement institutions (76%, and up from 70% in 2018)).

The confidence in the rule of law system varies greatly across the region. In Bosnia and Herzegovina, some 80% (from 67% in 2018) of all respondents challenge the effectiveness of the legal system, only 46% harbour those concerns in Montenegro (from 42% in 2018). For equality in treatment, arguably a more important feature of the legal system for transitional economies, the figures are even more striking, as well as disturbing: 88% of respondents in Albania feel that their judicial and law enforcement institutions give favourable treatment to

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

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

**Figure 105 : How much trust do you have in certain institutions? (SEE region) A – Courts and judiciary; B – Parliament; C – Government; D – Ombudsman; E - Supreme audit institution[92]**
(All respondents – N=6020, scale from 1 to 4, share of total, %)




some, challenging the very premise of rule of law. Montenegro is best ranked here as well, albeit with more than half of the respondent population questioning the equitable application of laws (57%).

As anticipated in the last year's Barometer, a substantial drop in confidence in rule of law institutions by the public in North Macedonia in 2018 was more transient in character with the settlement of the dispute leading to a stabilisation and improved survey numbers, especially in regard to the effectiveness of the rule of law system (up by 13 points from 2018).

Rule of law must be made an absolute priority, both by government and international actors working in the region, for a myriad of reasons, including but not limited to: 1)curbing organised crime and drug trafficking[93]; 2) managing illegal migration; 3) decreasing flow of skilled labour from the region due to concerns over corruption and state capture; and 4) improving the business environment as a boon to prospective foreign investors.

The levels of respondent confidence in their economies' public institutions are at an all-time low, with a significant decline in trust across most of the institutions which is covered this survey.

While still deeply unpopular and dropping a further 5 points since 2018 (only 30% of respondents now indicate that they trust their parliament), the legislature is no longer the least trusted institution in the region with the work of the judiciary trusted by a mere 29% of respondents, an incredible eight-point drop in a single year. Viewed alongside survey results for the effectiveness and equality of the rule of law system, examined previously (Figure 102 and Figure 103), this is an urgent call to action for all stakeholders with an interest in a credible, legitimate and effective judiciary.

At the other end of the scale, the Ombudsman Institution is the only one surveyed where approval ratings exceed 40, albeit only just (41%, down from 43% in 2018). Obviously, there is wholesale disillusionment with public institutions sweeping the region with every single institution surveyed dropping in the public's estimation of their trustworthiness. This is especially concerning as it comes on the heels of a gradual improvement in ratings recorded by the 2018 edition of the Barometer.

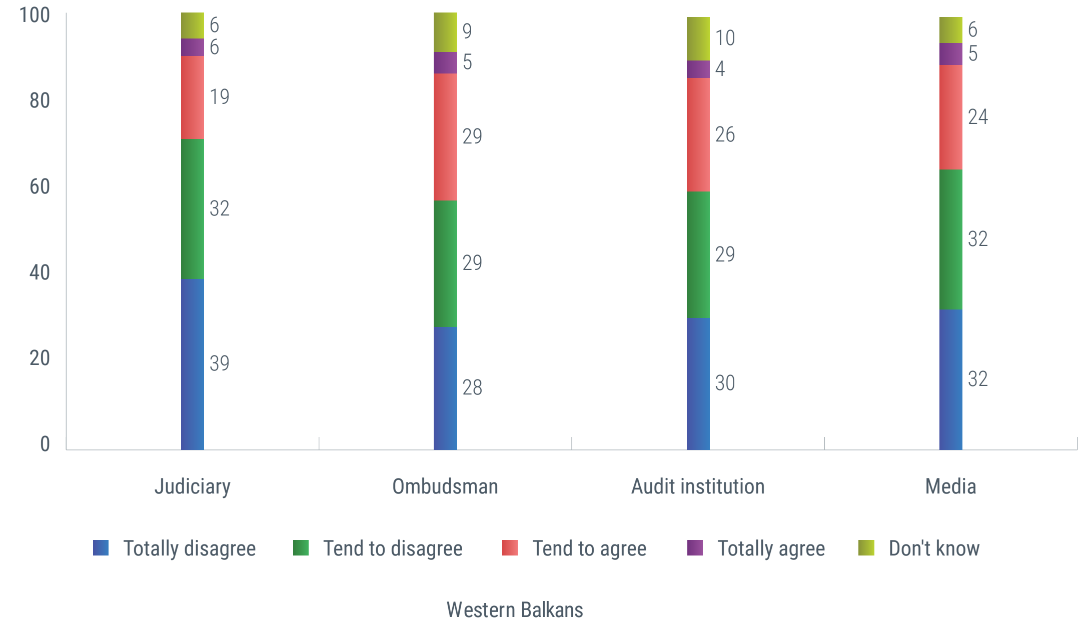
92 The figures might not add to 100% due to rounding.

93 The UN estimates that some 28 billion USD in heroin and opium makes its way into Europe via the Western Balkans every year, available at https://www.unodc.org/documents/data-and-analysis/Studies/IFF_report_2015_final_web.pdf





**Figure 106: Do you agree that the following institutions are independent of political influence? (SEE region) A – Judicial system; B – Ombudsman; C - Supreme audit institution; D - Media[94]**
(All respondents – N=6020, scale from 1 to 4, share of total, %)




At economy level, Montenegro is once more the regional economy with most satisfied respondents as more than half of survey participations trust the work of four out of five public institutions under review. Bosnia and Herzegovina, meanwhile, has the lowest trust rating for four of the five surveyed institutions, with the Republic of North Macedonia respondents expressing the lowest trust in courts regionally.

Overall, courts and parliaments tend to be the least trusted, with governments dropping out of the top two after traditionally leading the rankings for a number of years.

The fact that the ombudsman is once again the most trusted public institution across the region is a cause for some concern as it is also the only one out of the five without executive or enforcement powers.

As in previous years, respondents overwhelmingly dispute the use of "independent" to describe the four sectors under review. The share of survey participants who feel that all four institutions surveyed have fallen under political control has risen substantially in the past year: 59%, or +5, for the Supreme audit institution; 51%, or +6, for the Ombudsperson Institution; 71%, or +7, for the judiciary; and 64%, or +8, for the media.

Again, there is widespread sentiment that nominally independent institutions have largely been captured by political interests and therefore cannot be relied upon to discharge their mandates, or perform safeguard roles, free of political interference. As noted, the Ombudsperson Institution is considered most independent (34% feel it is free from political influence) while less than a quarter think that the judiciary is operating free from undue interference (24%).

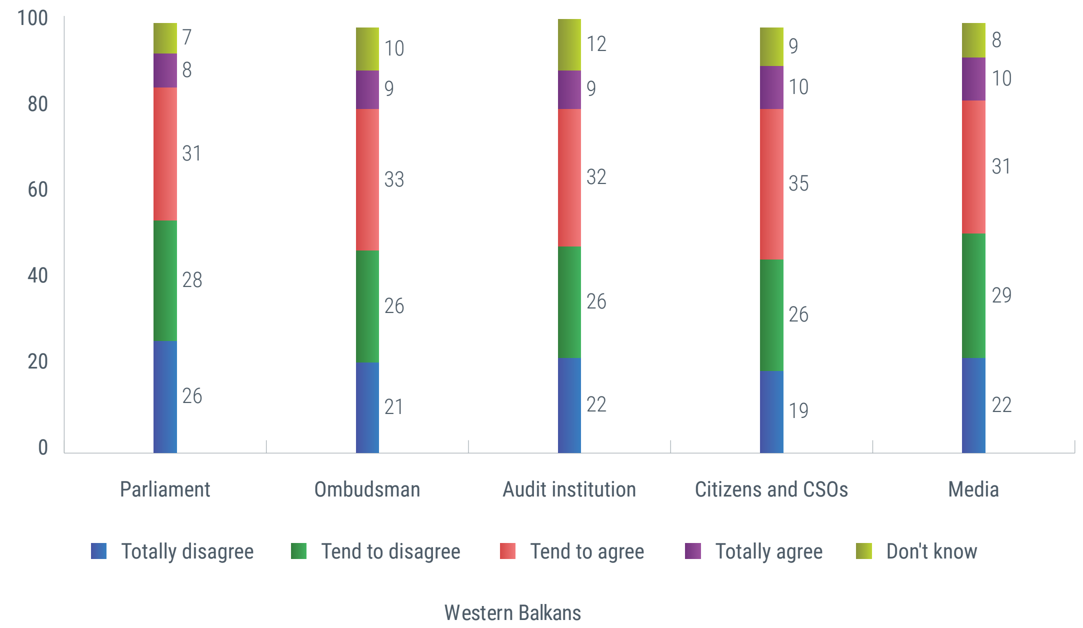
The judiciary is perceived as most in thrall to political interests in four of the six economies surveyed. Albanian respondents lead the rankings with soaring 84% of respondents who feel that the judiciary in their economy is not independent of political interference. Bosnia and Herzegovina, however, leads the other three surveyed categories: 77% dispute the status of media as independent; 75% consider the Supreme audit institution to be under control of political interests; and 68% believe that the Ombudsperson Institution is governed by political considerations in its decision-making.

There is little faith in the system of checks and balances with declining belief in the ability of all five actors surveyed to hold the government to account. Parliaments are least likely to effectively scrutinise the work of government, according to a majority of survey respondents, with citizens and civil society organisations being the respondents' most effective tool in performing executive oversight. This is a worrying development as the legislature is constitutionally mandated to oversee the work of government and holds the necessary legal powers, as well as operational capabilities, to do so.

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

**Figure 107: Do you agree that the following institutions are independent of political influence? (By economies) A – Judicial system; B – Ombudsman; C - Supreme audit institution; D - Media[95]**
(All respondents – N=6020, scale from 1 to 4, share of total, %)


**Figure 108: Do you agree that the following institutions can effectively scrutinise the government and make it accountable to citizens? (SEE region) A – Parliament; B – Ombudsman; C - Supreme audit institution; D - Citizens and civil society organisations; E – Media[96]**
(All respondents - N=6020, scale from 1 to 4, share of total, %)




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

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



The numbers of respondents who feel disillusioned by the ability of the legislature, civil society and media, as well as independent institutions to hold the executive accountable have declined, in some cases substantially, over the past year.

Bosnia and Herzegovina suffers from a serious lack of confidence in the ability of both governmental and non-governmental actors to hold the executive to account with all five categories surveyed dominated by negative responses from this economy.

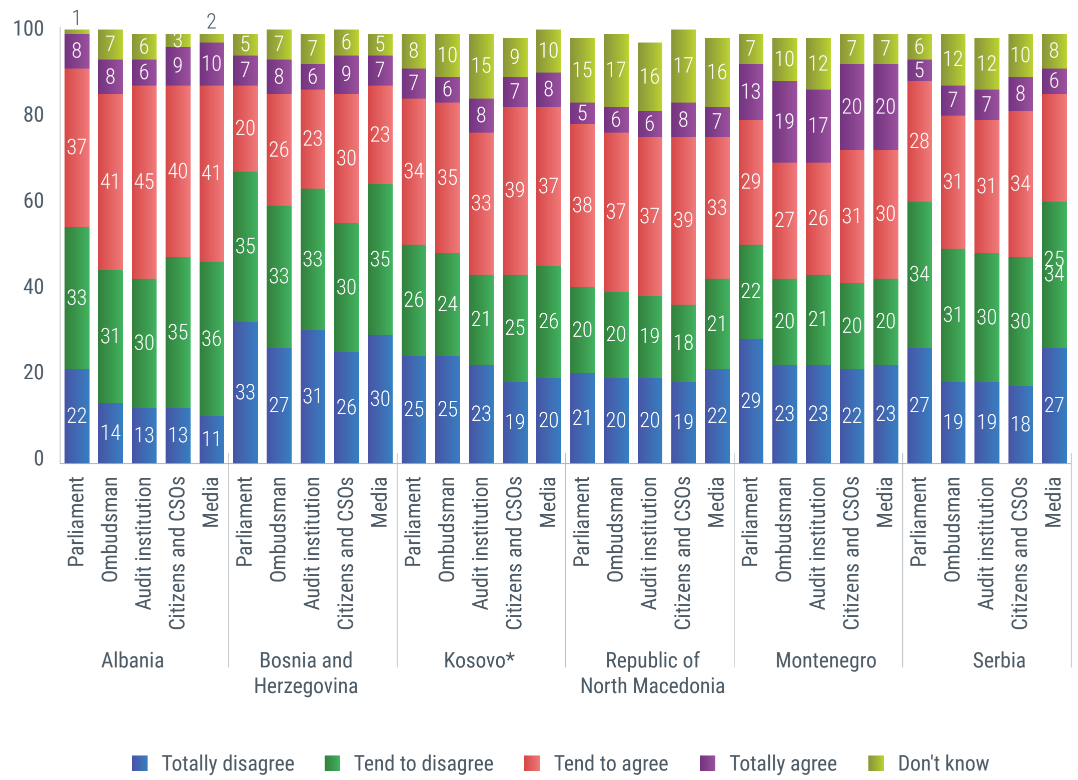
At the same time, Montenegrin respondents are overwhelmingly most likely to place their faith in the ability of the actors surveyed to perform executive oversight.

In addition to placing little trust in the judiciary and questioning its impartiality, the Western Balkans citizens also view the actual work performed by the courts and the justice system very unfavourably. The length and cost of judicial proceedings are viewed negatively by 61% of citizens, with 58% having unfavourable view when it comes to execution of judgments and 56% view the judiciary as untransparent. Accessibility seems to be the only dimension of the justice system that has received a slightly less unfavourable rating, with 49% of respondents assessing accessibility of justice systems negatively.

Looking at the individual economies, the picture becomes much more nuanced. As illustrated in the figure above, the citizens of Montenegro have a significantly more positive view of the justice system than their peers in other economies. In fact, it is the only economy in the region where more citizens assessed the justice system positively than negatively across all five dimensions, with margins between positive and negative responses ranging from 7 to 13 points. Kosovo* citizens' assessment of the job done by their judiciary is less positive then in Montenegro, but still considerably higher than in other parts of the region. Yet, on aggregate, more of its citizens still view the judiciary negatively than positively across all dimensions.

Albania lies on the other side of this spectrum where a large majority of citizens feel that the justice system is doing a poor job on all of the dimensions assessed;; a view that is closely followed by

**Figure 109: Do you agree that the following institutions can effectively scrutinise the government and make it accountable to citizens? (By economies) A – Parliament; B – Ombudsman; C - Supreme audit institution; D - Citizens and civil society organisations; E – Media[97]**
(All respondents - N=6020, scale from 1 to 4, share of total, %)




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

the respondents in Bosnia and Herzegovina, Republic of North Macedonia and Serbia

Review of individual dimensions reveals access to courts as seemingly least problematic, as it received the highest relative scores across the region (good, very good or excellent), ranging from 17% in Albania to 48% in Montenegro, with other economies in between. Cost of proceedings, on the other hand, is pinpointed as the biggest issue in Serbia (72%) and Bosnia and Herzegovina (75%).

**Figure 110: How would you rate the justice system in terms of: A - Length of proceedings, B - Accessibility, C- Costs of proceedings, D - Execution of Judgments, D- Transparency?[98]**
(All respondents - N=6020, scale from 1 to 5, share of total, %)

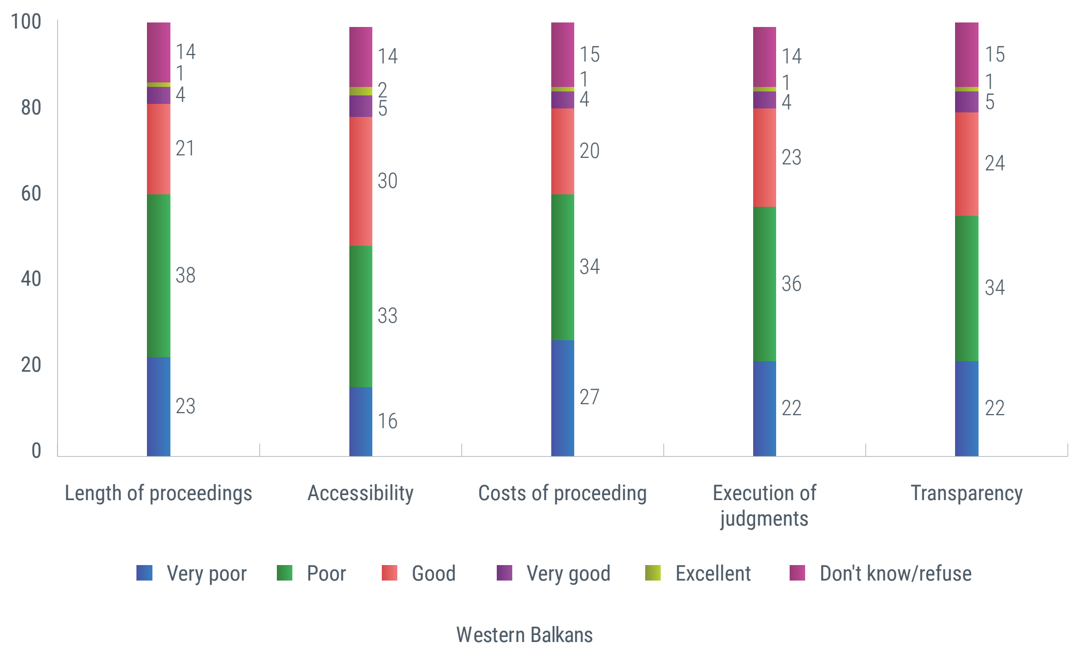



**Figure 111: How would you rate the justice system in terms of: A - Length of proceedings, B - Accessibility, C- Costs of proceedings, D - Execution of Judgments, D- Transparency? (Western Balkans)[99]**
(All respondents - N=6020, scale from 1 to 5, share of total, %)


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

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

# PERCEPTIONS OF CORRUPTION

There is a notable surge in the perceptions of corruption across the institutional landscape in the region; the vast majority of sectors, organisations and institutions reviewed are considered corrupt by an overwhelming majority of respondents. The crisis of confidence in the rule of law system is laid bare here as well with the judiciary considered corrupt by some 80% of respondents, second only to political parties (82%).

As in previous years, success in the public sector continues to be linked primarily to personal connections over hard work, an opinion that holds across each of the six individual economies.

The region's population is generally unhappy with the performance of their governments whether in making official information user-friendly and transparent or combating corruption; some 71% of all respondents feel that their governments' track record in battling corruption is poor, up by ten points since the 2018 edition of the Barometer.

These sentiments should urge the region's decision makers to move beyond declarative support for fighting corruption towards concrete measures and actions in order to restore the public confidence in the work of their elected representatives, and the rule of law system in particular. Otherwise, any meaningful progress, whether economic, societal or political, will likely remain out of reach.

Bribes remain most prevalent in the healthcare sector with only North Macedonia boasting fewer than 10% respondents who report making informal payments to medical professionals in their economy. In Albania, almost half of the population have exchanged bribes for services when seeking medical treatment. Some 8% of all the region's respondents admit to bribing police officers while a further 5% report making informal payments, or giving gifts, to individuals working in the judiciary. With the exception of the top 3 ranked sectors, the prevalence of corruptive practices across other areas reviewed seems to have decreased, in some cases substantially.

Albania, however, seems to have regressed, and now leads the corruption rankings in all nine sectors under review with the prevalence of bribes ranging from 13% to 45%, depending on the institution. A fifth of the population there report bribing individuals working in the judiciary while 16% have paid bribes or given gifts to police in the course of 2019. There is one notable positive example where the prevalence of bribes in the area of utilities has dropped significantly (from 13% in 2018 to 8% in 2019).

Bosnia and Herzegovina, meanwhile, has seen an increase in prevalence of corruptive actions across seven out of nine categories, leading to concerns about a further decline in institutional integrity by public service providers. Montenegro is at the other end of the scale with fewest registered instances of bribes being paid across seven of nine categories under review.

**Figure 112: In your contact or contacts with the public institutions, have you or anyone living in your household paid bribe in any form in the past 12 months?**
(Respondents answering "Yes" – N=6020, share of total, %)

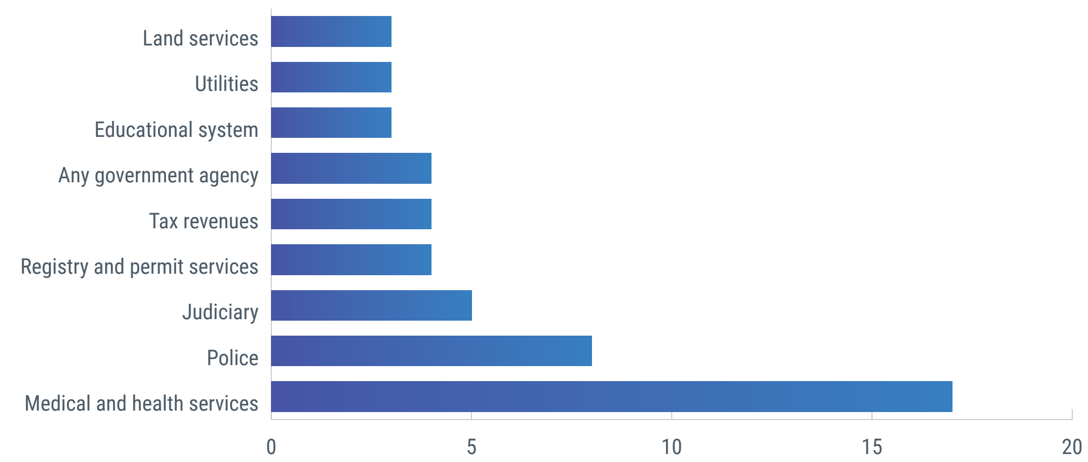


*Table 11: In your contact or contacts with the public institutions, have you or anyone living in your household paid bribe in any form in the past 12 months?*

*(Respondents who replied "Yes" – N=6020, share of total, %)*

| Action | Albania | Bosnia and Herzegovina | Kosovo* | Republic of North Macedonia | Montenegro | Serbia |
|---|---|---|---|---|---|---|
| Medical and health services | 45 | 15 | 10 | 9 | 10 | 10 |
| Police | 16 | 13 | 2 | 5 | 4 | 6 |
| Judiciary | 20 | 2 | 4 | 2 | 1 | 2 |
| Registry and permit services | 10 | 3 | 4 | 2 | 2 | 2 |
| Tax revenues | 11 | 2 | 6 | 2 | 1 | 1 |
| Any government agency | 11 | 3 | 3 | 1 | 2 | 2 |
| Educational system | 7 | 2 | 3 | 2 | 1 | 2 |
| Utilities | 8 | 2 | 5 | 1 | 1 | 2 |
| Land services | 12 | 2 | 2 | 3 | 1 | 2 |

There is a notable surge in the perceptions of corruption across the institutional landscape in the region; only two of the 13 institutions are perceived as corrupt by fewer than half of all respondents, the military (37%) and the religious organisations (41%), with the other 11 seen as corrupt by, in most cases, an overwhelming majority of respondents.

Once more the crisis of confidence in the work of the judiciary becomes apparent; only political parties (82%) are considered more corrupt than the judicial system (80%), according to most respondents.

The military and religious institutions are traditionally the two segments of society considered least corrupt with NGOs, previously part of this small group, now joining the ranks of those widely seen as corrupt by a majority of respondents.

As last year, Bosnia and Herzegovina tops the corruption perception charts with high scores in five different categories. Kosovo* leads three with Albania and Serbia topping two each. Customs, the judiciary and political parties are perceived quite poorly across most economies. Meanwhile, religious organisations were deemed least corrupt in all but two economies; respondents in Kosovo* and Serbia were least likely to identify their militaries as corrupt.

**Figure 113: To what extent do you agree or not agree that the following categories in your economy are affected by corruption? (SEE region)**
(All respondents - N=6020, scale 1 to 4, "tend to agree" + "totally agree", %)

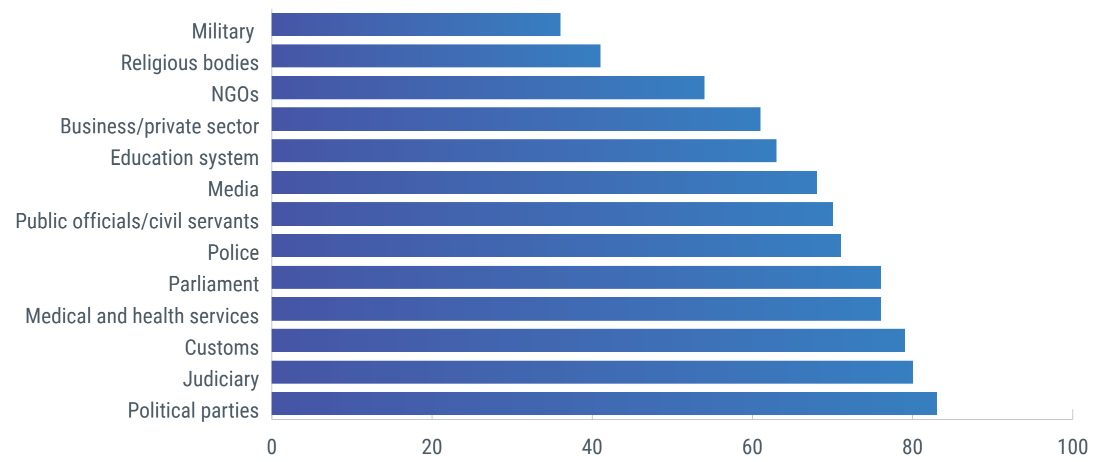



*Table 12: To what extent do you agree or not agree that the following categories in your economy are affected by corruption? (By economies)*

*(All respondents - N=6020, scale 1 to 4, "tend to agree" + "totally agree", %)*

| Action | Western Balkans | Albania | Bosnia and Herzegovina | Kosovo* | Republic of North Macedonia | Montenegro | Serbia |
|---|---|---|---|---|---|---|---|
| Political parties | 83 | 90 | 84 | 82 | 85 | 73 | 81 |
| Judiciary | 80 | 90 | 81 | 74 | 89 | 71 | 76 |
| Customs | 79 | 80 | 79 | 72 | 86 | 74 | 83 |
| Medical and health services | 76 | 77 | 80 | 73 | 78 | 71 | 80 |
| Parliament | 76 | 79 | 80 | 80 | 77 | 67 | 72 |
| Police | 71 | 63 | 82 | 55 | 76 | 71 | 77 |
| Public officials/ civil servants | 70 | 63 | 80 | 62 | 71 | 71 | 71 |
| Media | 68 | 59 | 77 | 56 | 70 | 69 | 79 |
| Education system | 63 | 51 | 68 | 70 | 64 | 64 | 58 |
| Business/private sector | 61 | 52 | 73 | 60 | 54 | 66 | 61 |
| NGOs | 54 | 41 | 62 | 48 | 53 | 62 | 57 |
| Religious bodies | 41 | 19 | 52 | 44 | 42 | 47 | 43 |
| Military | 36 | 24 | 55 | 34 | 25 | 49 | 31 |

Montenegro has the highest number of categories – five- where its institutions were deemed to be least corrupt out of the Western Balkans Six.

Success in the public sector is much more linked to personal connections than hard work, feels a vast majority of survey respondents. This is true across each individual economy as well, although in Kosovo* the margin between the importance afforded to the two considerations is by far the smallest in the region (6.7 for connections vs. 6.1 for hard work). The gap is biggest in the Republic of North Macedonia with 7.4 for connections vs. 4.8 for hard work. Compared to 2018, largest discrepancies in perceptions are observable in Albania and Montenegro, while the perceptions in the rest of the region are largely consistent with the last year's results.

The written information provided by the government is easy to understand and is delivered in plain language according to half of the respondent population (50%). There are no major changes as compared to the 2018 edition of the Barometer, with a large number of respondents still unhappy with the quality of information on offer by their governments (38%).

Efforts to make documents, laws as well as other information provided by public institutions more accessible and user-friendly are needed as a matter of urgency for two principle considerations: i) public administrations must become more service-oriented in line with what is required from modern public bureaucracies; and ii) the standards of transparency in the conduct of public affairs demand clear and frequent communication on behalf of policy makers and civil servants alike.

Viewed by economy, the survey results are once more disappointing reading for the government in Bosnia and Herzegovina where a record high of 56% of respondents feel unhappy with the quality of information provided by the public authorities, up from last year's 52%. At the same time, Kosovo* reports fewest issues with understanding of government-provided information – 64% are happy with the quality of information provided.

**Figure 114: To what extent do you agree or not agree with the following statement?**
**- Hard work is no guarantee of success in public sector as for most people it is more a matter of connections.**
**- In public sector most people can succeed if they are willing to work hard.**
(All respondents - N=6020 in 2019, N=6025 in 2018, scale 1 to 10 where 1 means "totally disagree" and 10 means "totally agree", mean)

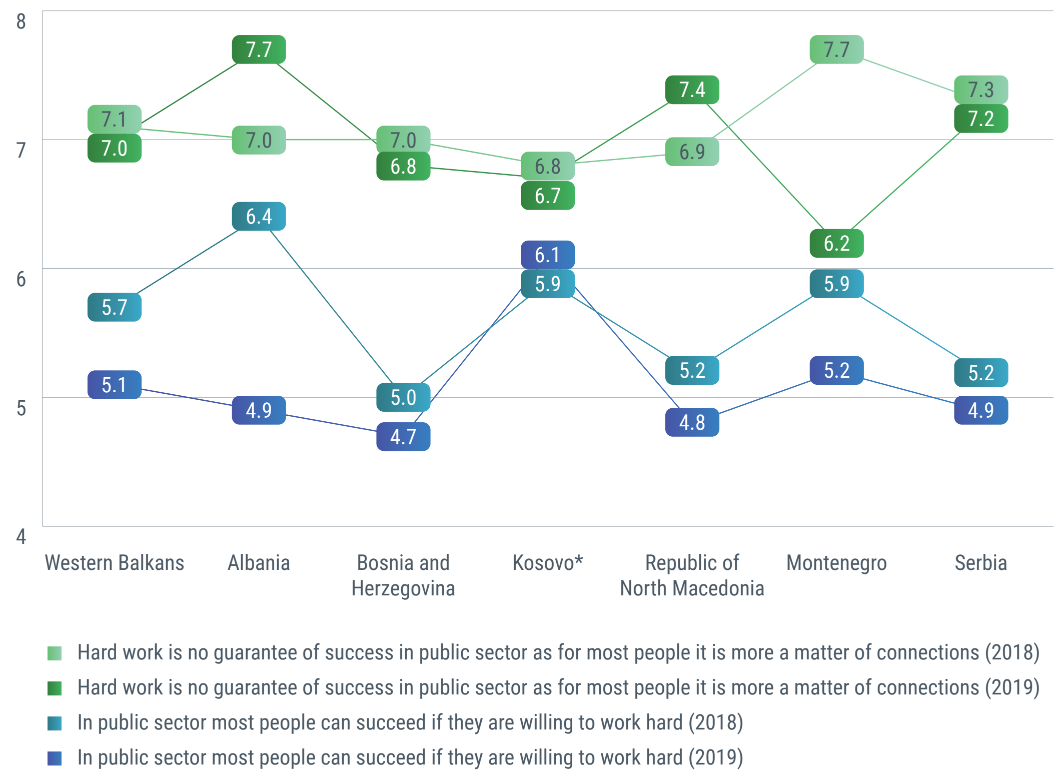
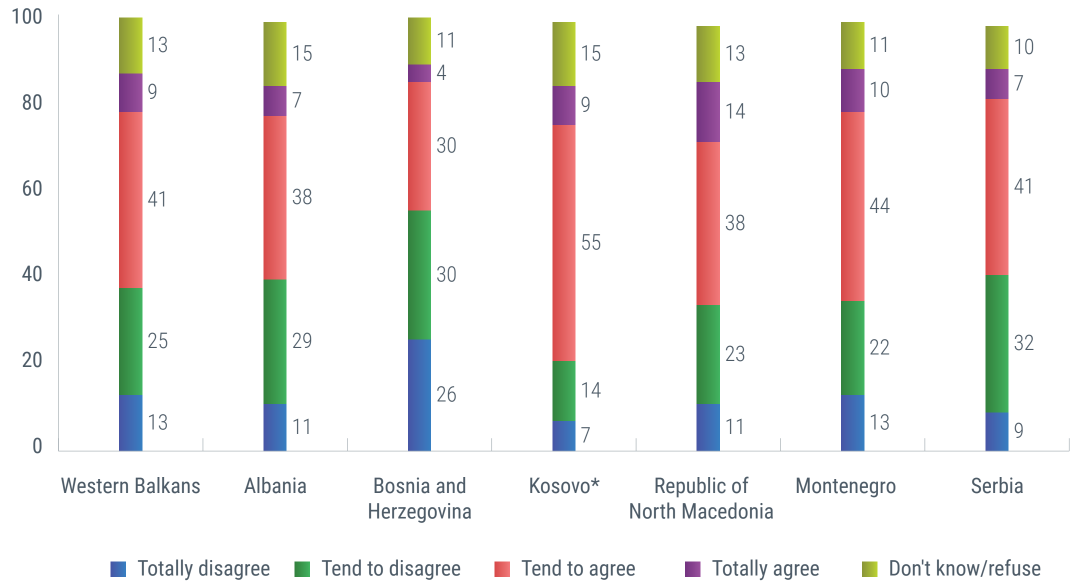



**Figure 115: Do you agree that written information of your Government (such as laws, decisions, web pages, forms) is overall easy to understand and uses plain language?[100]**
All respondents – N=6020, scale 1 to 4, share of total, %)



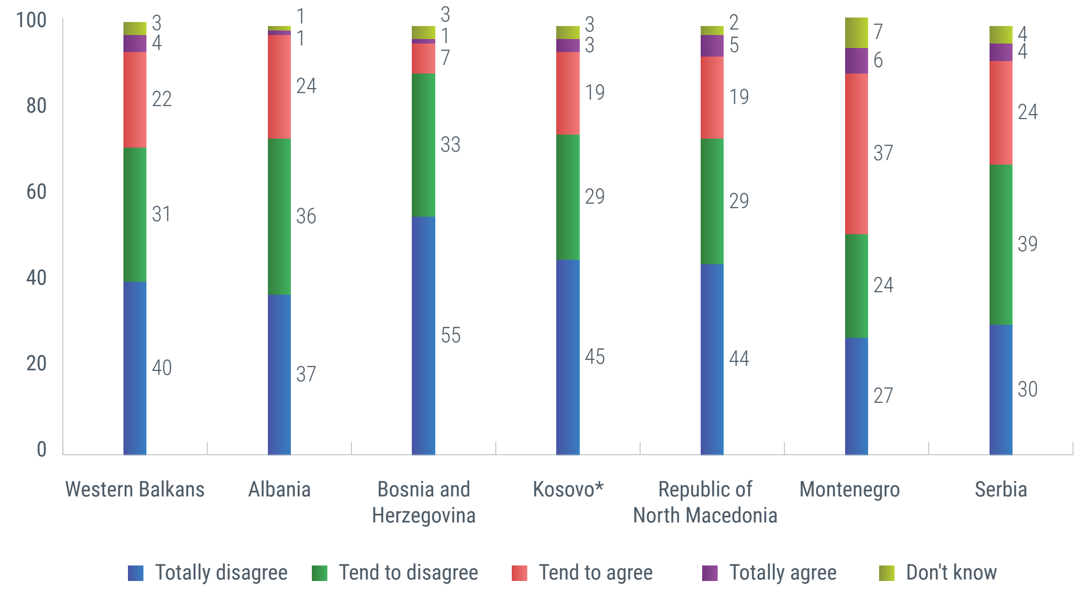

100 The figures might not add to 100% due to rounding.

More than two-thirds of the region's population are unhappy with their governments' attempts to curb corruption (71%). After some positive results in 2018 when the number of dissatisfied respondents dropped by nine points, the figure has now gone back up by ten (from 61% in 2018 to 71% in 2019).

An astounding 88% of the population in Bosnia and Herzegovina view their government's handling of anti-corruption as unsatisfactory, a regional high. At the same time, Montenegro has fewest unhappy respondents with 51%. This shows, however, that in every one of the region's six economies the respondents unhappy with their government's anti-corruption efforts outnumber, often dramatically, those that are.

Montenegro is, once more, the only economy in the region to score above the Transparency International's global average (43 out of 100) on the Corruption Perception Index for 2019 with 45 out of 100; the rest of the region's economies range from 35 to 39. As all six economies have made European integration an immediate priority, their governments should be alarmed by the gap between the six economies and Western Europe and the European Union where the average corruption perception index for 2019 was 66.

**Figure 116: Do you agree that in your economy the government fights corruption successfully?[101]**
All respondents – N=6020, scale 1 to 4, share of total, %)




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

# PARTICIPATION IN DECISION MAKING

With one notable exception, the economies of the region are seeing more people engage in political debate, even if only with friends and family, helping shrink the ranks of the previously dominant passive respondents; more than half of the surveyed population now engage in some form of political activity, even if through dialogue only. Still, with other traditional democratic safeguards, such as the media and independent institutions, under threat of political capture, the onus to provide oversight and ensure accountability will increasingly be placed on the general public.

Apathy, however, is once more the most commonly cited impediment to engagement in decision-making, alongside a desire not to be publicly outed as advocating an overtly political position. The fact that the number of respondents across these two categories has grown since the last edition of the Barometer is a cause for some concern, signalling an increasing trend of disengagement by alienation as well as a growing fear of repercussions for political self-identification.

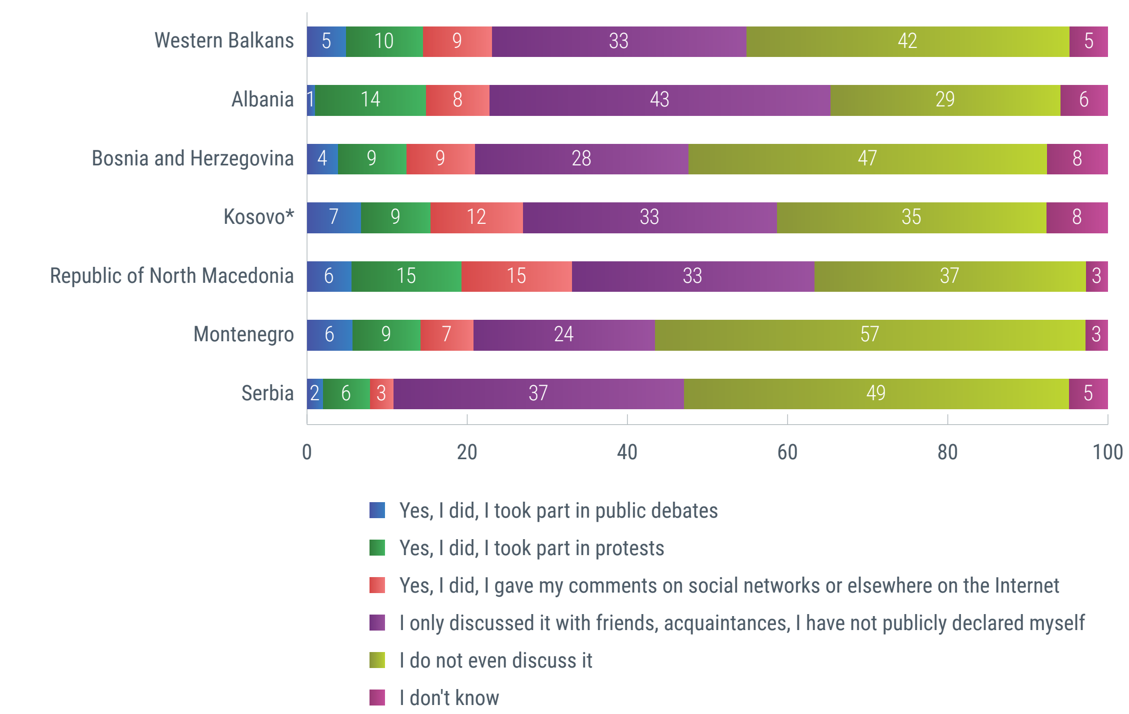
The freedom to air opinions on political developments, or government decisions, is part and parcel of democracy and citizens should not have to engage in self-censorship out of concern for consequences they may face for voicing said opinions.

While survey respondents overwhelmingly consider citizens and civil society organisations to be the best safeguard against excesses of the executive (see Figure 92 in Perceptions on Public Institutions and Services), some 42% of respondents admit to never discussing affairs of the government while a third do so only with friends and family (33%). Meanwhile, just 15% admit to taking part in public events, whether debates or protests. Overall, however, the number of people engaging with government decisions has grown, if at a minor rate, across most categories.

The silent group has significantly declined in membership by seven points while those that discuss government decisions in private have grown by five. The online activists are unchanged with 9% while the ranks of protesters and debaters have grown by four and two points respectively.

Montenegro is this year's most passive economy with 57% of respondents never engaging in any discussion of public policy, up from 46% in 2018. This economy has also recorded a corresponding drop in the number of respondents who discuss policy with family and friends (-11).

**Figure 117: Have you ever done something that could affect any of the government decisions?[102]**
(All respondents - N=6020, multiple answers, share of total, %)

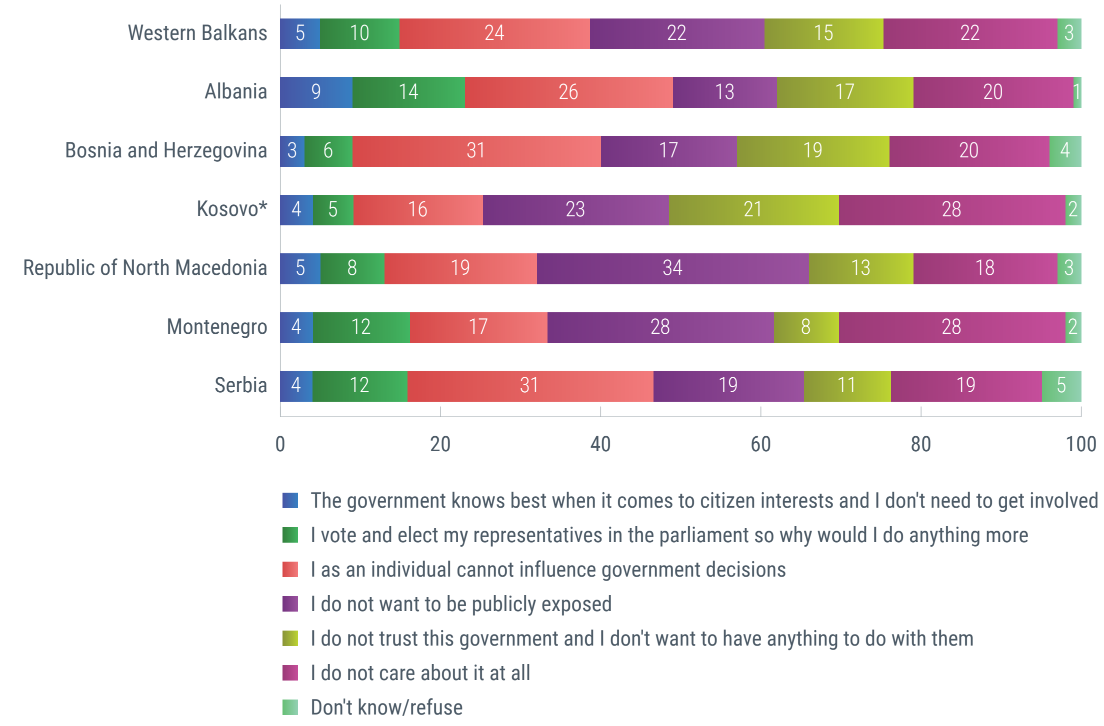



102 The figures might not add to 100% due to rounding.





**Figure 118: What is the main reason why you are not actively involved in government decision-making?[103]**
(Those not actively involved - N=4544, share of total, %)




Respondents in Albania, meanwhile, are most likely to discuss government affairs in a familial setting with 43%, and most likely to protest – 14%. Since last year, the number of passive respondents in Albania has nearly halved, dropping from 57% in 2018 to 29% for this edition of the Barometer. Interestingly, Albania also has fewest respondents who engaged in a public debate on policy with just 1%.

North Macedonia has the most active online presence with 15% of respondents commenting on government decisions via social networks or elsewhere on the Internet. This economy has also seen a ten-point drop in the ranks of the most passive respondent population and an eight-point surge in the numbers of those who discuss policy but do so in a familial setting only.

With 8%, Kosovo* has the highest proportion of respondents who refused to even engage with this question out of lack of interest or awareness of the issue. Much like North Macedonia, Kosovo* has seen a dramatic drop in passive respondents (-13) and a near-corresponding hike in the ranks of those who discuss government affairs with friends and family (+14).

With one notable exception, the economies of the region are seeing more people engage in political discussion, even if with friends and family only, helping shrink the previously dominant passive population. The percentage of respondents now engaging in some form of politics has grown to 57%, from 45% in 2018.

Apathy is once more the most commonly cited impediment to engagement in decision-making (24%, +3 from 2018), alongside a desire not to be publicly outed as advocating an overtly political position (22%, +5 from 2018). The fact that the number of respondents across these two categories has grown since the last edition of the Barometer is a cause for some concern, signalling an increasing trend of disengagement by alienation as well as a growing fear of repercussions for political self-identification.

At the same time, some 15% explain their disengagement with absolute trust in the work of their elected representatives while, interestingly, the exact same percentage attribute their passivity to feelings of alienation from the government. The number of disinterested respondents has significantly declined from 2018 and now makes up some 22% of the population (-11).

Montenegro and Kosovo* (both at 28%) have the highest share of respondents who claim not to care about the political developments in their economy

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

while Bosnia and Herzegovina and Serbia (both at 31%) have the most respondents who feel powerless to influence developments.

Close to a quarter of all respondents from Albania (23%) feel confident enough in the work of government not to interfere with, or comment on, its performance. Significantly, more than a third of all respondents from North Macedonia (34%) withhold their views out of fear of being identified and publicly exposed. Traditionally, this has been the economy most concerned with exposure and the fact that the number of respondents in this category is growing should be a cause for concern. The freedom to air opinions on political developments or government decisions is part and parcel of democracy and citizens should not self-censor out of concern for repercussions they may face for voicing those opinions.





# CONCLUSIONS AND RECOMMENDATIONS

Edition after edition, the Balkan Barometer results call for greater substantive engagement by the region's governments in order to improve the public's severely shaken confidence in their institutions. The region's population remains overwhelmingly unhappy with the performance of their public officials across virtually all critical performance indicators. Clearly, whatever work is being done to make government business more effective, efficient and transparent is proving woefully inadequate and requires a significant rethinking. Responsible politics, along with better governance and stronger rule of law, represent helpful, if general, guideposts for this process moving forward.

Elsewhere, unemployment is down, but growing outward migration coupled with high rates of inactivity call for a more comprehensive, sorely needed two-fold effort: harnessing the now-dormant labour at home and laying a more structured framework for engagement with the region's diaspora abroad.

The importance of who you know rather than what you know is once again the big takeaway from this year's employability survey. Merit-based considerations in recruitment and hiring, rather than personal contacts, should be pushed to the forefront by the region's governments, and other employers. With high numbers of long-term unemployed, and many rendered de facto inactive by virtue of their long-held joblessness, confidence in the job market needs to be rebuilt in order to mobilise this large but dormant contingent of prospective job seekers. This is set to become increasingly important for economies already experiencing labour pool depletion as a result of large outward migration. Concerningly, fewer than two-thirds of the region's graduates secured employment within three years of leaving school while only a quarter were employed in the first 12 months following graduation.

Bridging the gap between the needs of the employers and the skills and competences produced in the education system is gaining in importance as more than a quarter of all respondents in the region feel underprepared and underserved by the education systems in their economies. While most of the region's governments are already engaging in reform-minded dialogue with both educators and employers, this work will need to be intensified and linked to a more strategic consideration of the region's industrial development priorities. Foreign languages and digital skills are once more the two topical areas where most employers expect to see their workers learn, highlighting two critical areas of improvement for the region's education system.

At the same time, a rapidly growing recognition of the risks posed by climate change across much of the region should open up ample space for joint action by regional actors to curb the spread, and mitigate the effects, of critical environmental risks. Encouragingly, a growing number of respondents support strengthening commercial ties within the Western Balkans region.

Road fatalities, meanwhile, remain at almost double the rate of the EU, necessitating rapid and decisive action by the region's governments along the lines of the EU's Policy Orientations on Road Safety 2011-2020 that contributed to a sharp decline in the number of road fatalities between 2010 and 2018 in the Union Member States. In addition to investments in infrastructure, there is a need for better enforcement of traffic rules, improved driver training, safer technologies, better emergency response and protection of vulnerable road users, among others.

Finally, the region is increasingly turning towards its public service infrastructure as a critical investment priority, and away from industrial development, signalling a need for stronger government engagement in further developing the social infrastructure. This trend will certainly be reinforced by the COVID-19 outbreak and the negative consequences that will be left in its wake.

# NOTE ON METHODOLOGY

Methodology used for Public Opinion Survey was quantitative research and data collection method – CAPI (Computer-Assisted Personal Interviewing). The survey was conducted via personal household interviews carried out by trained interviewers from Indago between December 2019 and January 2020 in Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, the Republic of North Macedonia and Serbia.

As part of project set-up phase, some preparations and adjustments were undertaken as necessary for the successful implementation of the survey:

## Questionnaire

The survey questionnaire was provided by the RCC.

The Public Opinion Survey questionnaire was composed of a total of 116 questions, including those on demographics (region, size of settlement, gender, age, education, nationality, marital status, household income and self-assessed social status of the respondent).

The questionnaire was originally written in English and subsequently translated into relevant local languages. In Kosovo*, both Albanian and Serbian versions of the questionnaire were used, and in the Republic of North Macedonia, the questionnaire was translated and used in Macedonian and Albanian. RCC reviewed and approved all the translations of the questionnaires.

Since the CAPI methodology was used in the research, all questionnaires were converted to a digital form and installed on interviewers' laptops/tablets. The programmed questionnaires were reviewed by a responsible person in each economy.

## Interviewers

The survey was conducted by experienced interviewers in all economies. All the interviewers were given written instructions containing general description of the questionnaire, of the method of selecting addresses for the interviews and of the respondent selection method. In addition to the written instructions, all interviewers were trained to understand research goals, interviewing method and eligible respondent selection (a random route for selection of households and last birthday method for selection of a respondent within a household). Since a random route method was chosen for the research, all Indago interviewers were given the initial addresses for sampling points, and later on they used a random route method for selection of households. In addition, project coordinators reviewed the entire digital questionnaire jointly with the interviewers and emphasised some important elements (especially the need to read individual answers where one or more answers were possible, etc.).

## Sample

Public Opinion Survey was conducted among N=1000 respondents in each economy, aged 18+ with the total of 6,020 respondents for the entire SEE region.

For the Public Opinion Survey, the target respondents were persons:

- aged 18 or older who reside in private households,
- whose usual place of residence is in the territory of the economies included in the survey,
- who speak the national language(s) well enough to respond to the questionnaire.

A stratified two-stage clustered design sample with random route for the selection of addresses and last birthday rule for the selection of respondents from a list of all 18+ household members was used in the survey. The sampling selection process is random in the following stages: selection of the sampling points, selection of addresses, selection of households and selection of individuals aged 18 and older.

Primary sampling units (clusters) were the enumeration districts/neighbourhoods and secondary sampling units were the dwellings (addresses). In order to create the sample design, the most recent available statistical data for each economy was used. The sample structure for each economy is presented in the tables below.

## Stratification/selection procedure:

In order to obtain the same structure of the population, the sample was firstly stratified according to the region or county (depending on economy). At the beginning of the sampling procedure, the number of persons to be interviewed in each region or county was defined according to census data and the share of the region in the total population.

The number of respondents was calculated proportionally based on the number of inhabitants in each size of settlements in the region/county, while the number of sampling points was defined based on the obtained number of respondents (for each region/county and in each size of settlement). The maximum number of respondents per one sampling point was 10 on average.

After defining their number, the sampling points were selected randomly, with probability proportional to the size within each stratum, and according to the last census data. Households in each sampling point were chosen by a random walk method. In a selected household, the respondent was the person whose birthday came latest.

*Table 13: Sample structure by size of settlement*

| Economy | Size of settlement | % |
|---|---|---|
| Albania | Up to 2,000 | 17.6 |
| | 2,001 – 10,000 | 24.8 |
| | 10,001 – 50,000 | 16.5 |
| | 50,001 – 100,000 | 9.7 |
| | Over 100,001 | 31.4 |
| Bosnia and Herzegovina | Up to 5,000 | 57.5 |
| | 5,000 – 19,999 | 18.6 |
| | 20,000 – 49,999 | 7.5 |
| | 50,000 – 99,999 | 5.8 |
| | Over 100,000 | 10.5 |
| Kosovo* | Up to 2,000 | 23.5 |
| | 2,001 – 5,000 | 24.3 |
| | 5,001 – 10,000 | 15.8 |
| | Over 10,001 | 36.4 |
| Republic of North Macedonia | Up to 2,000 | 24.6 |
| | 2,001 – 5,000 | 17.2 |
| | 5,000 – 10,000 | 14.3 |
| | Over 10,001 | 43.9 |
| Montenegro | Up to 5,000 | 38.1 |
| | 5,001 – 10,000 | 19.1 |
| | 10,001 – 20,000 | 14.5 |
| | 20,001 – 30,000 | 5.9 |
| | 30,001 – 50,000 | 4.7 |
| | 50.001 – 70,000 | 0.8 |
| | 70,001 – 100,000 | 2.9 |
| | Over 100,000 | 14.0 |
| Serbia | Up to 5.000 | 28.4 |
| | 5.001 - 10.000 | 4.2 |
| | 10.001 - 20.000 | 7.9 |
| | 20.001 - 50.000 | 10.5 |
| | 50.001 - 100.000 | 16.8 |
| | 100.001 - 150.000 | 7.0 |
| | 150.001 - 250.000 | 5.2 |
| | Over 250.000 | 20.1 |

**Figure 119: Sample structure by gender**[104]

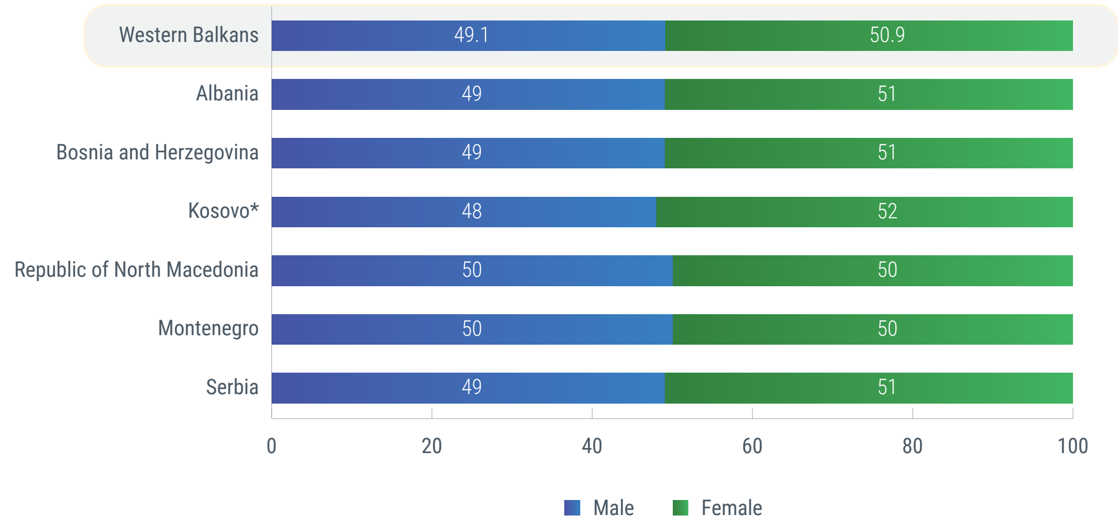
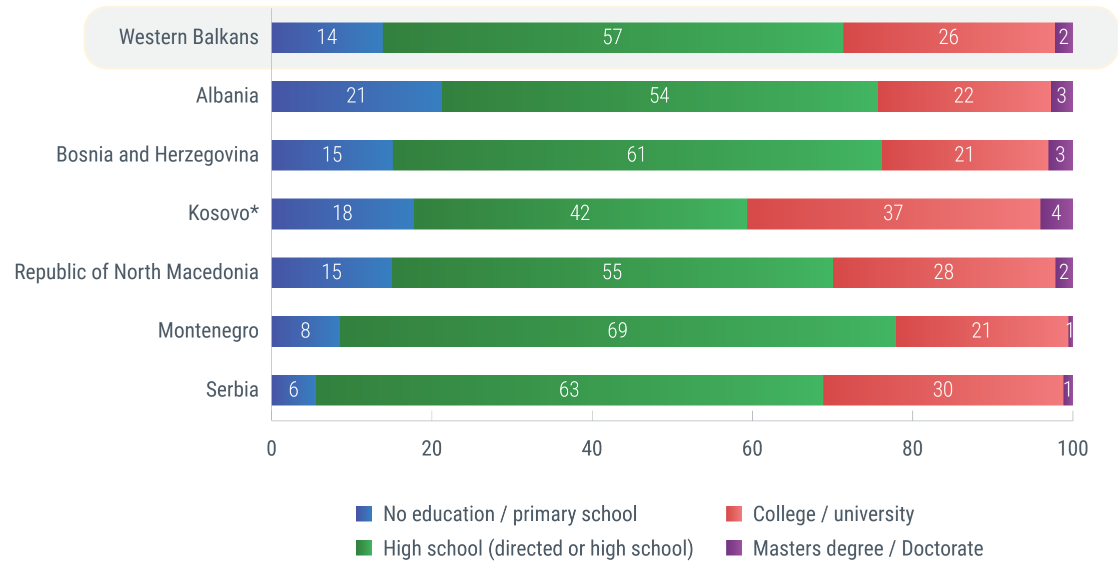



**Figure 120: Sample structure by age**[105]


**Figure 121: Sample structure by education**[106]




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

**Figure 122: Sample structure by marital status[107]**

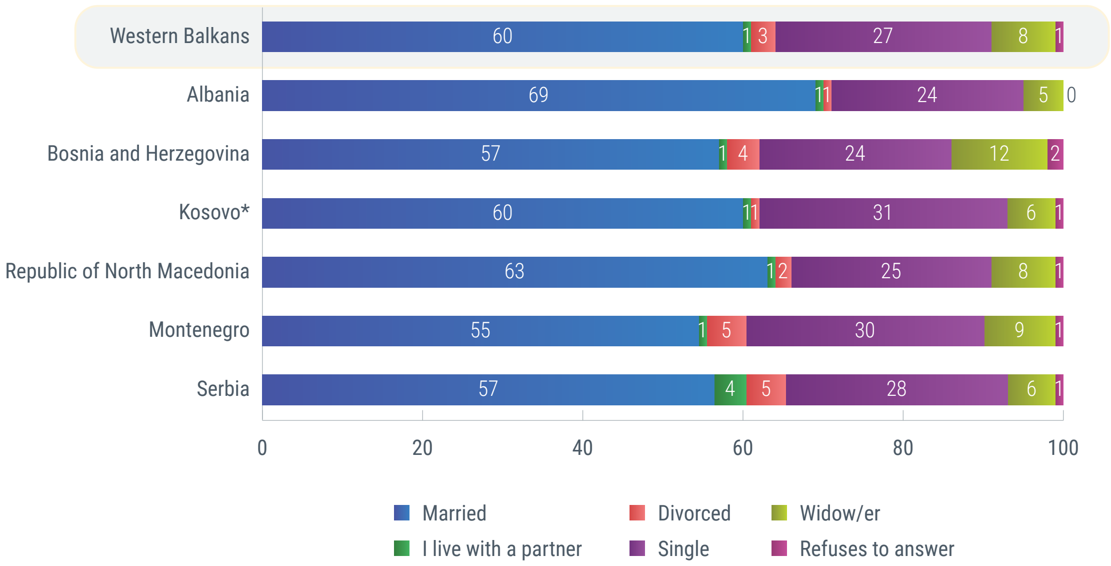
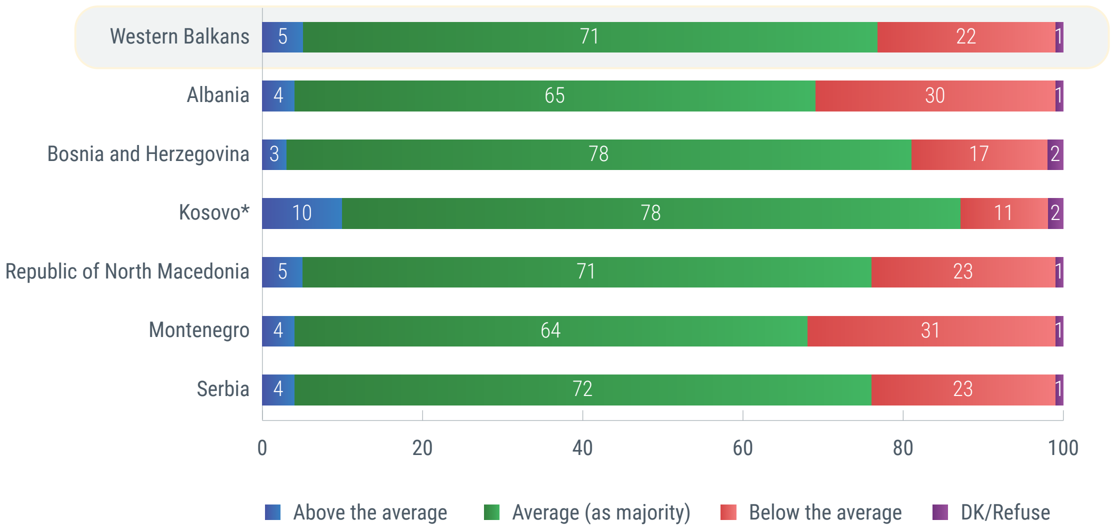



**Figure 123: Sample structure by social status (self-estimation)[108]**




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