

ANNEX VII

Reference Number 080-020

Implementation of Public and Business Opinion Surveys in the Western Balkans - Balkan Barometer 2021, data collection, data processing and data analysis, conclusions and recommendations

Balkan Barometer 2019 – Public Opinion: Questionnaires

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THE BALKAN BAROMETER 2019: PUBLIC OPINION SURVEY

A. LIFE SATISFACTION AND ASSESSMENT OF GENERAL TRENDS

1. How satisfied are you with the way things are going in [ECONOMY]?

- 1) I'm completely dissatisfied
- 2) I'm mostly unsatisfied
- 3) Neither satisfied nor dissatisfied
- 4) I'm mostly satisfied
- 5) I'm completely satisfied
- 6) I don't know/refuse to answer

2. How satisfied are you with the economic situation in [ECONOMY]?

- 1) I'm completely dissatisfied
- 2) I'm mostly unsatisfied
- 3) Neither satisfied nor dissatisfied
- 4) I'm mostly satisfied
- 5) I'm completely satisfied
- 6) I don't know/refuse to answer

3. How satisfied are you with the financial situation of your household?

- 1) I'm completely dissatisfied
- 2) I'm mostly unsatisfied
- 3) Neither satisfied nor dissatisfied
- 4) I'm mostly satisfied
- 5) I'm completely satisfied
- 6) I don't know/refuse to answer

4. How satisfied are you with the way [ECONOMY] tackles security challenges?

- 1) I'm completely dissatisfied
- 2) I'm mostly unsatisfied
- 3) Neither satisfied nor dissatisfied
- 4) I'm mostly satisfied
- 5) I'm completely satisfied
- 6) I don't know/refuse to answer

5. What are your expectations for the next year? Do you think that in 12 months your financial situation will be:

- 1) Better
- 2) Worse
- 3) The same
- 4) I don't know/refuse to answer

6. What are your expectations for the national economy? Do you think that in 12 months the state of the economy will be:

- 1) Better
- 2) Worse
- 3) The same
- 4) I don't know/refuse to answer

7. What do you think are the two most important problems facing [ECONOMY]? (MAX TWO ANSWERS)

- 1) Unemployment
- 2) Economic situation
- 3) Crime

- 4) Corruption
- 5) Brain drain/emigration
- 6) Education system
- 7) Health system
- 8) Political disputes
- 9) Protection of human rights
- 10) Judicial system
- 11) Refugees
- 12) Security situation
- 13) Minorities rights
- 14) Environment and climate change (floods, droughts, etc.)
- 15) Gender inequality
- 16) Conservation and protection of natural and historic resources
- 17) If something else, what?

8. Could you please tell me how satisfied are you with each of the following in your place of living: Please use a scale from 1 to 5 where 1 means you are completely dissatisfied, 2 - mostly dissatisfied, 3 – neither satisfied nor dissatisfied, 4 - mostly satisfied and 5 – completely satisfied (6– I do not know/I cannot estimate for those who are not familiar with the mentioned services).

- 1) Health services
- 2) Education
- 3) In general with quality of transport infrastructure (please take into consideration the overall transport: public transport, quality of roads, railways, airports)
- 4) Utility services (water and sewage, electricity, gas supply, telephone, Internet)
- 5) Availability and affordability of housing
- 6) Safety from crime
- 7) Cleanliness of my city/town/village
- 8) Social life
- 9) Present job
- 10) Job opportunities
- 11) Public services in general
- 12) Administrative services from central government (such as passports and personal ID)
- 13) Level of prices
- 14) Tolerance and respect of differences
- 15) Social inclusion of vulnerable groups

9. In your opinion, in which of the following areas should your government invest its resources as a priority?

- 1) Energy sector
- 2) Transport infrastructure
- 3) Social infrastructure (such as schools and hospitals)
- 4) Tourism
- 5) Agriculture
- 6) Science and technology
- 7) Industrial development
- 8) Small and medium enterprise development
- 9) I don't know/refuse to answer

10. [MULTIPLE CHOICE] Do you, or any of the members of your household:

- 1) Have a loan or a mortgage issued by a local commercial bank
- 2) Own shares, bonds or other securities issued in the local capital market
- 3) Have a micro-loan issued by a microcredit institution
- 4) Have taken out a life insurance policy or other type of insurance with an insurance company
- 5) Have used a leasing product (such as car leasing)
- 6) None of the above
- 7) DK/Refuse to answer

11. 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 (ECONOMY)? (Max. 3 answers?)

- 1) Violence against women
- 2) Women being less likely to be in paid employment
- 3) Women being paid less than men for the same work
- 4) Prejudice about the image and role of women and men in society
- 5) Women forced into early marriages
- 6) The low number of women in leading positions in politics and businesses
- 7) Women being more likely to be poor than men
- 8) The unequal sharing of household tasks between men and women
- 9) Higher drop-out rate amongst boys in education compared to girls
- 10) Tackling lower life expectancy amongst men

12. When you think of the Western Balkans, what feeling first comes to mind?

- 1) Doubts
- 2) Hope
- 3) Fear
- 4) Confidence
- 5) Nothing (spontaneous)
- 6) Don't know

13. To what extent do you agree or disagree with the following statement: What brings Western Balkan citizens together is more important than what separates them?

- 1) Totally agree
- 2) Tend to agree
- 3) Tend to disagree
- 4) Totally disagree
- 5) Don't know

B. PERCEPTIONS ON SECURITY

14. Do you agree that migrants entering [ECONOMY] increase security risks for [ECONOMY]?

- 1) Totally disagree
- 2) Tend to disagree
- 3) Tend to agree
- 4) Totally agree
- 5) I don't know/refuse to answer

15. Which factors do you think contribute the most to radicalization and violent extremism in [ECONOMY] today?

- 1) Unemployment/financial insecurity
- 2) Weakness of state and social security institutions
- 3) Social media
- 4) Propaganda/fake news
- 5) Other

16. To what extent are you afraid of your children or young relatives and friends to get radicalized in online sphere?

- 1) Very afraid because there are no efficient ways how to control it
- 2) Not afraid at all
- 3) There is a strong probability for online radicalisation, and therefore additional measures have to be undertaken

17. **How threatened do you feel by the illegal possession and misuse of weapons in your neighbourhood (as in crime, domestic violence, celebratory shooting, etc.)?**

- 1) I feel very threatened
- 2) I feel threatened
- 3) I do not feel threatened at all

18. **Would you consider owning a gun?**

- 1) Yes
- 2) No
- 3) DK/refuse to answer

19. **Would having a gun at home make you feel:**

- 1) Safer
- 2) Less safe
- 3) DK/Refuse to answer

C. ATTITUDES ON REGIONAL COOPERATION AND EU INTEGRATION

20. **Do you agree that the relations in the Western Balkans are better than 12 months ago?**

- 1) Totally disagree
- 2) Tend to disagree
- 3) Tend to agree
- 4) Totally agree
- 5) I don't know/refuse to answer

21. **Do you agree that regional cooperation can contribute to the political, economic or security situation of [ECONOMY]?**

- 1) Totally disagree
- 2) Tend to disagree
- 3) Tend to agree
- 4) Totally agree
- 5) I don't know/refuse to answer

22. **Overall, are you interested in news and information about the rest of the Western Balkans region? (Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, Serbia, North Macedonia)**

- 1) Yes
- 2) No
- 3) I don't know/refuse to answer

23. **To whom in the Western Balkans region are you paying close attention?**

- 1) Albania
- 2) Bosnia and Herzegovina
- 3) Kosovo*
- 4) Montenegro
- 5) Serbia
- 6) North Macedonia
- 7) Entire region
- 8) I don't know/refuse to answer

24. **Do you think that EU membership would be a good thing, a bad thing, or neither good nor bad for [ECONOMY]? SINGLE ANSWER!**

- 1) Good thing
- 2) Neither good nor bad
- 3) Bad thing
- 4) I don't know/refuse to answer

25. What would EU membership mean to you personally? PICK MAXIMUM TWO ANSWERS!

- 1) Freedom to travel
- 2) Freedom to study and/or work in the EU
- 3) Economic prosperity
- 4) Peace and stability
- 5) Social protection
- 6) Gender equality
- 7) Loss of [ECONOMY] sovereignty
- 8) Nothing good/positive
- 9) I don't know/refuse to answer

26. In general, when do you expect the accession of [ECONOMY] to the EU to happen? SINGLE ANSWER!

- 1) By 2025
- 2) By 2030
- 3) Never
- 4) I don't know/refuse to answer

D. UNEMPLOYMENT AND RISK OF POVERTY

27. Social status (self-estimation): How would you estimate your current socio-economic status? Do you live?

- 1) Above the average
- 2) Average (as majority)
- 3) Below the average
- 4) Refuse to answer

28. Do you think that the gap between the rich and the poor is increasing in your economy? SINGLE ANSWER!

- 1) Yes
- 2) No
- 3) I don't know/refuse to answer

29. What is your current working status?

- 1) Employed
- 2) Self-employed
- 3) Unemployed
- 4) Housewife
- 5) Retired
- 6) Student/pupil

[IF ANSWERED 1 IN PREVIOUS QUESTION]:

30. If you are employed, is it a private or public sector employment?

- 1) Private sector employment
- 2) Public sector employment

31. How confident are you in keeping your job in the coming 12 months?

- 1) Not confident at all
- 2) Not very confident
- 3) Fairly confident
- 4) Very confident
- 5) I don't know/refuse to answer

32. How many people in your family, who are able to work, are employed? (People who are able to work are those age 15 and older who are not in regular education and do not have any other obstacle for working such as disability)

- 1) 4 people and more
- 2) 3 people
- 3) 2 people
- 4) 1 person
- 5) 0 people
- 6) I don't know/refuse to answer

33. How many people in your family who are able to work are unemployed? (People who are able to work are those who are 15 and older who are not in regular education and do not have any other obstacle for working such as disability)

- 1) 4 people and more
- 2) 3 people
- 3) 2 people
- 4) 1 person
- 5) 0 people
- 6) I don't know/refuse to answer

33.a. IF THERE IS AT LEAST ONE UNEMPLOYED PERSON IN THE HOUSEHOLD, ASK: What are the two main obstacles to those in your household who do not work? PLEASE MARK ONE OF THE FOLLOWING ANSWERS ACCORDING TO THE RESPONDENT'S ANSWER OR WRITE DOWN ANSWERS WHICH ARE NOT MENTIONED BELLOW! TWO ANSWERS!

- 1) Inadequate or irrelevant education
- 2) Insufficient previous work experience
- 3) Do not know the right people
- 4) Lack of adequate jobs
- 5) Disability
- 6) Age discrimination (too old, too young)
- 7) Discrimination based on ethnicity/minority status (not belonging to majority population)
- 8) Other reason: _____
- 9) I don't know/refuse to answer

34. Did any of the following situations happen to you in the past 3 years?

- 1) Someone from your family, a relative, or a friend lost their job? YES/NO/ I do not know
- 2) One of your colleagues lost their job? YES/NO/I do not know/ I do not work – I do not have colleagues
- 3) You lost your job? YES/NO

35. Did your household face any of the following problems (even at least once) during the past 12 months: SINGLE ANSWER PER PROBLEM! (ANSWERS: YES, NO, I DO NOT KNOW)

- 1) Unable to pay rent or utility bills?
- 2) Unable to pay instalment on a loan?
- 3) Unable to keep home adequately warm?
- 4) Unable to afford food, clothes and other basic supplies?
- 5) Unable to afford at least one week of holiday away from home (if wanted to)?

36. Did your household receive help in the form of money or goods from another individual living abroad at least once in the past 12 months? SINGLE ANSWER!

- 1) Yes
- 2) No
- 3) I do not know/refuse to answer

37. To what extent do you agree with the following statements?

a) Some people look down on you because of your income or job situation.

- 1) Totally disagree
- 2) Tend to disagree
- 3) Tend to agree
- 4) Totally agree
- 5) I don't know/refuse to answer

b) I feel there is a risk that I could fall into poverty.

- 1) Totally disagree
- 2) Tend to disagree
- 3) Tend to agree
- 4) Totally agree
- 5) I don't know/refuse to answer

c) You feel left out of society.

- 1) Totally disagree
- 2) Tend to disagree
- 3) Tend to agree
- 4) Totally agree
- 5) I don't know/refuse to answer

c.1) (NEW) [IF ANSWERED 3 OR 4 TO PREVIOUS (c) QUESTION) You feel left out because you:

- 1) Can't find a job
- 2) Are disabled or sick
- 3) Belong to a minority group (ethnic, national, sexual)
- 4) Have little or no support from friends and/or family
- 5) Belong to an age group that is overlooked in our society
- 6) Other

38. Do you prefer to have a female or male boss at work?

- 1) Female
- 2) Male
- 3) I have no preference

39. Gender equality at work can be improved by (MULTIPLE ANSWERS):

- 1) Equalizing the number of female and male staff
- 2) Equalizing the salary and pay for man and women doing same jobs
- 3) Better maternity benefits
- 4) Entitled paternity benefits for husbands
- 5) There is no inequality between man and women in the workplace

E. EMPLOYABILITY AND LABOUR MARKET

40. What do you think is the most important for getting ahead in life?

- 1) Having a good education
- 2) Working hard
- 3) Knowing the right people
- 4) Being lucky
- 5) Belonging to a wealthy family
- 6) Something else, what? _____
- 7) I don't know/refuse to answer

41. In your opinion, which two assets are most important for finding a job today? PLEASE CHOOSE TWO ANSWERS MAXIMUM! READ ANSWERS!

- 1) Professional experience
- 2) Level of one's qualification/education
- 3) Ability to adapt
- 4) Digital skills
- 5) Language skills
- 6) Willingness to work abroad
- 7) Personal contacts
- 8) Network of family and friends in high places
- 9) Ethnic affiliation
- 10) None of these
- 11) Other (please specify): _____
- 12) I don't know/refuse to answer

42. If you could choose, would you prefer to work in the public (public administration and public companies) or private sector?

- 1) Public sector (e.g. Government or government agencies, public education or health, law enforcement etc.).
- 2) Public companies (state-owned enterprises)
- 3) Private sector
- 4) No preference
- 5) I don't know/ refuse to answer

42.a. If you prefer to work in PUBLIC sector, what is the main reason for that?

- 1) Better salary
- 2) Better pension after retirement
- 3) Better social care and access to health services
- 4) Job is safer
- 5) Better working conditions (less overtime job and workload)
- 6) Better advancement opportunities
- 7) Opportunities for professional training and development
- 8) Sense of public duty
- 9) Other
- 10) I don't know/refuse to answer

42.b. If you prefer to work in PRIVATE sector, what is the main reason for that?

- 1) Better salary
- 2) Better pension after retirement
- 3) Better social care and access to health services
- 4) Job is safer
- 5) Better working conditions (less overtime job and workload)
- 6) Better advancement opportunities
- 7) Opportunities for professional training and development
- 8) Other
- 9) I don't know/refuse to answer

43. How long it took you between finishing education and getting the first job?

1. Less than 1 year
2. 1 to 2 years year
3. 2 to 3 years
4. More than 3 years
5. More than 5 years

44. Would you rather work for a:

- 1) Foreign-owned company
- 2) Domestic company
- 3) No preference

45. Would you agree that the skills you learned in the education system meet the needs of your job?

- 1) Totally disagree
- 2) Tend to disagree
- 3) Tend to agree
- 4) Totally agree
- 5) I don't know/refuse to answer

46. [FOR EMPLOYED ONLY] Has your job required you to learn new or advance your skills in the past 12 months?

- 1) Yes
- 2) No
- 3) I don't know/refuse to answer

46.a. (IF YES: Which of these competences did you need to learn or advance (MULTIPLE CHOICE POSSIBLE):

- 1) I had to advance my communication skills in my mother tongue (e.g. writing, speaking and presenting in public, communicating with my colleagues or supervisors both orally or in written etc.)
- 2) My foreign language skills
- 3) Digital/ICT competences
- 4) Mathematical, numerical or technological skills (e.g. numerical data analysis, use of new technologies or equipment including machinery at work, etc)
- 5) I had to learn how to turn ideas into action as well as to plan and manage projects;
- 6) I had to learn how to effectively manage my own learning to keep up with my job;
- 7) I had to learn how to work in a diverse environment with different cultures and understandings

47. [[FOR EMPLOYED ONLY] Would you be ready to acquire additional qualifications to advance at work? SINGLE ANSWER.

- 1) I will not for sure
- 2) Probably I will not
- 3) Probably I will
- 4) I will for sure
- 5) I don't know/refuse to answer

48. [FOR UNEMPLOYED ONLY] Would you be ready to acquire additional qualifications in order to get a job? SINGLE ANSWER.

- 1) I will not for sure
- 2) Probably I will not
- 3) Probably I will
- 4) I will for sure
- 5) I don't know/refuse to answer

F. DIGITAL LITERACY AND DIGITAL SKILLS

49. (NEW) 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? (MULTIPLE ANSWERS POSSIBLE)

- 1) Free online training or self-study YES / NO
- 2) Training paid by yourself YES / NO
- 3) Free training provided by public programmes or organisations (other than your employer) YES / NO
- 4) Training paid or provided by your employer YES / NO
- 5) On-the-job training (by e.g. co-workers, supervisors, etc.) YES / NO

If yes to any of the 1-5

49.a. 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? (Tick all that apply)

- 1) Online marketing or e-commerce
- 2) Social media (e.g. google groups, Facebook, jive)
- 3) Programming languages, including design or management of websites
- 4) Data analysis or management of databases
- 5) Maintenance of computer networks, servers, etc.
- 6) IT – security or privacy management
- 7) Specific software applications for work
- 8) Other fields of training related to the use of computers, software or applications

50. (NEW) Have you used the Internet for the following? MULTIPLE ANSWERS!

- 1) Education
- 2) News
- 3) Shopping, including booking travel arrangements
- 4) Entertainment
- 5) Work/Business
- 6) Communication with colleagues, friends and family
- 7) Researching information for personal needs
- 8) Paying utility and other bills
- 9) Using government e-services
- 10) I don't use the Internet

51. Which feature is the most important aspect for you regarding your internet access? (SINGLE ANSWER)

- 1) Price level
- 2) Speed / bandwidth
- 3) Reliability / stability of connection
- 4) Coverage in your country
- 5) Others

52. Are you satisfied with your Internet connection?

- 1) Yes
- 2) No
- 3) I don't use the internet

53. What concerns do you have, if any, about using the Internet for things like online banking or buying things online? [MULTIPLE ANSWERS]

- 1) You are concerned about someone misusing your personal data
- 2) You are concerned about the security of online payments
- 3) You prefer conducting the transaction in person e.g. so you can inspect the product yourself or ask a real person about it
- 4) You are concerned about not receiving the goods or services that you buy online

54. NEW Do you still turn off mobile data when you are roaming in the Western Balkans region?

- 1) Yes
- 2) No

55. NEW Did the new Regional Roaming Agreement help you save money on your phone costs?

- 1) Yes, a lot
- 2) Yes, some
- 3) Not at all
- 4) DK/refuse to answer

G. ATTITUDES TOWARDS MOBILITY

56. Would you consider living and working abroad? SINGLE ANSWER!

- 1) Yes
- 2) No
- 3) I don't know/refuse to answer

56.a. (NEW) IF YES AT PREVIOUS QUESTION: In what phase of consideration are you?

- 1) Still just thinking about leaving
- 2) Actively getting informed about possibilities, options that I have
- 3) Reviewing and applying to vacancies
- 4) I've concretized everything, currently finishing necessary administrative issues
- 5) I know the exact date of departure
- 6) Other _____

57. Would you consider living and working in another place in the Western Balkans region? If yes, where?

- 1) Albania
- 2) Bosnia and Herzegovina
- 3) Kosovo*
- 4) Montenegro
- 5) Serbia
- 6) North Macedonia
- 7) I would not consider emigrating to other economies in the region
- 8) I don't know/refuse to answer

57.a. (NEW) IF YES AT PREVIOUS QUESTION: In what phase of consideration are you?

- 1) Still just thinking about leaving
- 2) Actively getting informed about possibilities, options that I have
- 3) Reviewing and applying to vacancies
- 4) I've concretized everything, currently finishing necessary administrative issues
- 5) I know the exact date of departure
- 6) Other _____

58. Did you travel anywhere in the region in the past 12 months? If yes, where? MULTIPLE ANSWERS!

- 1) Albania
- 2) Bosnia and Herzegovina
- 3) Kosovo*
- 4) North Macedonia
- 5) Montenegro
- 6) Serbia
- 7) No, I did not –
- 8) I don't know/refuse to answer

58.a. IF YES: What was the purpose of your travel? ASK THOSE WHO TRAVELED! MULTIPLE ANSWERS!

- 1) Business
- 2) Visiting family
- 3) Visiting friends
- 4) Tourism/leisure
- 5) Other

59. Do you feel welcome abroad when you are traveling to other cities in Western Balkans region (Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, Serbia, North Macedonia) either for business or leisure? SINGLE ANSWER!

- 1) Yes, I feel welcome in all of the cities in the region

- 2) I feel welcome in some of the cities, and unwelcome in others
- 3) No, I don't feel welcome in any of the cities in the region
- 4) I did not visit other cities in the region
- 5) I don't know/refuse to answer

60. What do you think about people from other parts of the region coming to live and work in [ECONOMY]? Is it good or bad for your economy? SINGLE ANSWER!

- 1) Good
- 2) Bad
- 3) Neither good nor bad
- 4) I don't know/refuse to answer

61. Which tourists would you like to have more in [ECONOMY], those from the Western Balkans region (Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, Serbia, North Macedonia) or from other parts of the world?

- 1) Those from the region (Albania, Bosnia and Herzegovina, Kosovo*, North Macedonia, Montenegro, Serbia)
- 2) Those from other parts of the world
- 3) Both equally
- 4) None of them
- 5) I don't know/refuse to answer

H. ATTITUDES TO SOCIAL INCLUSION OF VULNERABLE GROUPS

62. The Government should provide affirmative measures - promote opportunities for equal access - to persons belonging to the groups listed below when applying for a public or private sector job (agreement level; 1-4 scale)

- 1) Persons with disabilities (including persons with special needs)
- 2) Displaced persons and refugees
- 3) Roma population
- 4) Other minorities

SCALE:

- 1) Totally disagree
- 2) Tend to disagree
- 3) Tend to agree
- 4) Totally agree
- 5) I don't know/refuse to answer

63. The Government should do more in order to ensure better housing conditions for persons belonging to the groups listed below. (agreement level; 1-4 scale).

- 1) Persons with disabilities (including persons with special needs)
- 2) Displaced persons and refugees
- 3) Roma population
- 4) Other minorities

SCALE:

- 1) Totally disagree
- 2) Tend to disagree
- 3) Tend to agree
- 4) Totally agree
- 5) I don't know/refuse to answer

64. How likely is it that you are comfortable with:

- 1) working with a Roma
- 2) working for a Roma employer
- 3) your children go 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
- 8) rent housing to Roma

SCALE:

- 1) Uncomfortable
- 2) Somewhat uncomfortable
- 3) Somewhat comfortable
- 4) Comfortable
- 5) I don't know/refuse to answer

I. PERCEPTIONS ON TRADE AND INVESTMENT

65. How would you describe [ECONOMY'S] commercial and trade links with the Western Balkans region (Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, Serbia, North Macedonia)? SINGLE ANSWER!

- 1) Should be improved
- 2) Just about right
- 3) They are already too strong
- 4) I don't know/refuse to answer

66. Do you agree that in general entering of foreign companies in the market of [ECONOMY] will improve choice and decrease prices for consumers? SINGLE ANSWER!

- 1) Totally disagree
- 2) Tend to disagree
- 3) Tend to agree
- 4) Totally agree
- 5) I don't know/refuse to answer

67. Which countries/regions do you think your government should further improve trade and investment relations with:

- 1) European Union
- 2) Russia
- 3) China
- 4) Turkey
- 5) Middle East and Gulf Countries
- 6) Others (please specify):

68. Do you agree with the following statements? (Please use a scale from 1 to 4 where 1 means totally disagree, 2 – tend to disagree, 3 – tend to agree and 4 – totally agree)

68.a. Goods and services of my economy can compete well with goods and services from other Western Balkans economies (Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, Serbia, North Macedonia)

- 1) Totally disagree
- 2) Tend to disagree
- 3) Tend to agree
- 4) Totally agree
- 5) I don't know/refuse to answer

68.b. Goods and services of my economy can compete well with goods and services from the EU

- 1) Totally disagree
- 2) Tend to disagree
- 3) Tend to agree
- 4) Totally agree
- 5) I don't know/refuse to answer

69. If you could choose a food or beverage product from three different sources: domestic product, product from Western Balkans region (Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, Serbia, North Macedonia) and product from Western European countries, which one would be your first choice and which would be second? TWO OPTIONS: FIRST AND SECOND CHOICE!

FIRST CHOICE:

- 1) Domestic products
- 2) Product from Western Balkans economies
- 3) Products from Western European countries
- 4) I don't know/refuse to answer

SECOND CHOICE:

- 1) Domestic products
- 2) Product from Western Balkans economies
- 3) Products from Western European countries
- 4) I don't know/refuse to answer

70. When purchasing products in supermarkets, how often do you look at the labels to see the country of origin?

- 1) Never
- 2) Rarely ever
- 3) Sometimes
- 4) Frequently
- 5) Always
- 6) I don't know/refuse to answer

71. 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)? SINGLE ANSWER!

- 1) Local suppliers should be given priority
- 2) Local suppliers should be treated the same as foreign suppliers in public procurement
- 3) I don't know/refuse to answer

J. PERCEPTIONS ON TRANSPORT AND INFRASTRUCTURE

72. Which mode of transport did you most often use when travelling outside of your place of residence in the past 12 months? SINGLE ANSWERS!

- 1) Automobile
- 2) Bus
- 3) Airplane
- 4) Train
- 5) Other (please specify): _____
- 6) I did not travel outside of my place of residence in the past 12 months
- 7) I don't know/refuse to answer

73. How do you estimate the quality of transport infrastructure and connections within [ECONOMY]? (Please use a scale from 1 to 5, where 1 is very poor and 5 is excellent). SINGLE ANSWER!

- 1) Very poor
- 2) Poor

- 3) Good
- 4) Very good
- 5) Excellent
- 6) I don't know/refuse to answer

74. How do you estimate the quality of transport infrastructure and connections within the Western Balkans region (Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, Serbia, North Macedonia)? Please use a scale from 1 to 5, where 1 is very poor and 5 is excellent. SINGLE ANSWER!

- 1) Very poor
- 2) Poor
- 3) Good
- 4) Very good
- 5) Excellent
- 6) I don't know/refuse to answer

75. Would you agree that travelling by road in [ECONOMY] is safe? SINGLE ANSWER!

- 1) Totally disagree
- 2) Tend to disagree
- 3) Tend to agree
- 4) Totally agree
- 5) I don't know/refuse to answer

76. In your opinion, which passenger transport mode improvements would have the highest beneficial impact on your travelling? SINGLE ANSWER!

- 1) Roads
- 2) Railroads
- 3) Air travel
- 4) Waterway transport
- 5) None of the above – I do not travel
- 6) I don't know/refuse to answer

K. ATTITUDES TOWARDS CLIMATE CHANGE AND ENERGY

77. Is climate change a problem? SINGLE ANSWER!

- 1) Very serious problem
- 2) Somewhat serious problem
- 3) Not too serious problem
- 4) Not a problem at all
- 5) I don't know/refuse to answer

78. (NEW) Do you consider pollution to be a problem in your place of living? SINGLE ANSWER!

- 1) Very serious problem
- 2) Somewhat serious problem
- 3) Not too serious problem
- 4) Not a problem at all
- 5) I don't know/refuse to answer

79. In your opinion, who within your economy is responsible for tackling climate change? (READ ANSWERS, MUTIPLE)

- 1) Governments
- 2) Business and Industry
- 3) You personally
- 4) Regional and local authorities
- 5) NGOs (Environmental groups....)
- 6) All of the above

- 7) None
- 8) I don't know/refuse to answer

80. Do you agree with the following statement: I'm ready to buy environmentally friendly products even if they cost a little bit more? SINGLE ANSWER!

- 1) Totally disagree
- 2) Tend to disagree
- 3) Tend to agree
- 4) Totally agree
- 5) I don't know/refuse to answer

81. Which of the following actions have you taken, if any? (MULTIPLE ANSWERS POSSIBLE)

- 1) You try to reduce your waste and you regularly separate it for recycling
- 2) You try to cut down on your consumption of disposal items whenever possible, e.g. plastic bags from the supermarket, excessive packaging
- 3) You buy locally produced and seasonal food whenever possible
- 4) When buying a new household appliance e.g. washing machine, fridge or TV, you choose it mainly because it was more energy efficient than other models
- 5) You regularly use environmentally friendly alternatives to using your private car such as walking, biking, taking public transport or car-sharing
- 6) You have insulated your home better to reduce your energy consumption
- 7) You have bought a new car and its low fuel consumption was an important factor in your choice
- 8) You avoid taking short-haul flights whenever possible
- 9) You have switched to an energy supplier which offers a greater share of energy from renewable sources than your previous one
- 10) You have installed equipment in your home (for example solar panels to generate renewable electricity)
- 11) You have bought a low energy home
- 12) None
- 13) I don't know/refuse to answer

L. PERCEPTIONS ON PUBLIC INSTITUTIONS AND SERVICES

CONFIDENCE IN AND PERCEPTIONS ON INDEPENDENCE OF PUBLIC INSTITUTIONS

82. Have you had contact with public services in the last year?

- 1) Yes
- 2) No

83. [IF YES] If yes, whether these were central or local government services?

Int: READ EXAMPLES FOR EACH SERVICE

- 1) Central government services (such as issuing or renewing a passport or ID card, registering ownership change for a non-commercial vehicle, justice services, or declaring personal revenue taxes)
- 2) Local government services (such as getting health treatment or enrolling your child in school)

84. How would you grade (from 1 to 5 where 1 means very poor and 5 excellent) the following issues: READ ANSWERS! ROTATE ANSWERS! (if the respondent could not answer this question, please mark answer 6 – I do not know/I can't estimate)

- 1) Time required to get information from public sector (data which public authorities have such as documents, registers, records, etc.)
- 2) Treatment of citizens in public sector (police, health system, judiciary, township, etc.)

- 3) Time required to obtain public services (police, health system, judiciary, township, etc.)
- 4) Price of public services (e.g. issuance of personal documents, judiciary costs, etc.)

SCALE:

- 1) Very poor
- 2) Poor
- 3) Good
- 4) Very good
- 5) Excellent

85. (NEW) Is it possible to get your personal documents (birth certificate, citizenship, etc.) or any other personal document - online? SINGLE ANSWER!

- 1) It is possible and I am using this service.
- 2) It is possible but I do not know how to do this/do not have computer/Internet.
- 3) It is not possible.
- 4) I don't know/refuse to answer

86. Do you agree with the following statements? Agree on a scale from 1-5 (1 – totally disagree, 2– tend to disagree, 3 – tend to agree, 4 – totally agree and 5 – refuse to answer

- 1) Requests for information held by a government agency are granted in timely manner
- 2) The information provided by a government agency is pertinent and complete
- 3) Requests for information by a government agency are granted at a reasonable cost

87. Do you agree that the administrative procedures in public institutions in [ECONOMY] are efficient? (For example: administrative procedures in township where you get your documents, in police where you put in a request, etc.) SINGLE ANSWER!

- 1) Totally disagree
- 2) Tend to disagree
- 3) Tend to agree
- 4) Totally agree
- 5) I don't know/refuse to answer

88. Do you agree that in [ECONOMY] the law is applied and enforced effectively? SINGLE ANSWER!

- 1) Totally disagree
- 2) Tend to disagree
- 3) Tend to agree
- 4) Totally agree
- 5) I don't know/refuse to answer

89. Do you agree that in [ECONOMY] the law is applied to everyone equally? SINGLE ANSWER!

- 1) Totally disagree
- 2) Tend to disagree
- 3) Tend to agree
- 4) Totally agree
- 5) I don't know/refuse to answer

90. How much trust do you have in certain institutions? For each of the following institutions, please tell me if you 1 - totally distrust, 2 - tend not to trust, 3- tend to trust, 4 – totally trust 5- I don't know/refuse to answer

- 1) Courts and judiciary
- 2) Parliament
- 3) Government
- 4) Ombudsman
- 5) Supreme audit institution

91. Do you agree that the following institutions are independent of political influence? (1-totally disagree, 2 – tend to disagree, 3 tend to agree, 4 – totally agree and 5 – I don't know/refuse to answer)

- 1) Judicial system
- 2) Ombudsman
- 3) Supreme audit institution
- 4) Media

92. Do you agree that the following institutions can effectively scrutinize the government and make it accountable to citizens? (1- totally disagree, 2 – tend to disagree, 3 tend to agree, 4 – totally agree and 5 – I don't know/refuse to answer)

- 1) Parliament
- 2) Ombudsman (use local name)
- 3) Supreme audit institution (use local name)
- 4) Citizens and civil society organisations
- 5) Media

M. PERCEPTIONS OF CORRUPTION

93. In your contact or contacts with the public institutions, have you or anyone living in your household paid a bribe in any form in the past 12 months? (1 – yes, 2 – no, 3 – I don't know/refuse to answer)
ASK FOR EACH INSTITUTION

- 1) Educational system
- 2) Judiciary
- 3) Medical and health services
- 4) Police
- 5) Registry and permit services
- 6) Utilities
- 7) Tax revenues
- 8) Land services
- 9) Any government agency

94. To what extent do you agree or not agree (see) that the following categories in your economy are affected by corruption? (1-5 where 1 means - totally disagree, 2 – tend to disagree, 3 tend to agree, 4 – totally agree and 5 – I don't know/refuse to answer)

- 1) Customs
- 2) Political parties
- 3) Parliament
- 4) Military
- 5) NGOs
- 6) Media
- 7) Religious bodies
- 8) Business/private sector
- 9) Education system
- 10) Judiciary
- 11) Medical and health services
- 12) Police
- 13) Public officials /civil servants

95. To what extent do you agree or not agree with the next statement? Please use scale from 1 to 10 where 1 means I totally disagree and 10 means I totally agree. Please use the whole scale to express your opinion.

- 1) In public sector most people can succeed if they are willing to work hard
- 2) Hard work is no guarantee of success in public sector as for most people it is more a matter of connections

96. Do you agree that written government information in (SCRIPTER: your economy) (such as laws, decisions, web pages, forms) is overall easy to understand and uses plain language? (1- totally disagree, 2 – tend to disagree, 3, - tend to agree, 4 – totally agree, 5 - I don't know/refuse to answer)

97. Do you agree that in [ECONOMY] the government fights corruption successfully? READ ANSWERS! SINGLE ANSWER!

- 1) Totally disagree
- 2) Tend to disagree
- 3) Tend to agree
- 4) Totally agree
- 5) I don't know/refuse to answer

N. PARTICIPATION IN DECISION MAKING

98. Have you ever done something that could affect any of the government decisions? MULTIPLE ANSWERS!

- 1) Yes, I did, I took part in public debates
- 2) Yes, I did, I took part in protests
- 3) Yes, I did, I gave my comments on social networks or elsewhere on the Internet
- 4) I only discussed it with friends, acquaintances, I have not publicly declared myself
- 5) I do not even discuss it
- 6) I don't know/refuse to answer

98.a. IF ANSWER IN PREVIOUS QUESTION IS 4 OR 5: What is the main reason you are not actively involved in government decision-making? SINGLE ANSWER!

- 1) The government knows best when it comes to citizen interests and I don't need to get involved
- 2) I vote and elect my representatives in the parliament so why would I do anything more
- 3) I as an individual cannot influence government decisions
- 4) I do not want to be publicly exposed
- 5) I do not trust this government and I don't want to have anything to do with them
- 6) I do not care about it at all
- 7) I don't know/refuse to answer

O. RULE OF LAW

99. How would you rate the justice system in terms of:

- 1) Lengths of proceedings
- 2) Accessibility
- 3) Costs of proceedings
- 4) Execution of judgements
- 5) Transparency

DEMOGRAPHY

Education

Nationality

Marital status

Average monthly household income

Region

Size of settlement

Age

Gender

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THE BALKAN BAROMETER 2019: BUSINESS OPINION SURVEY

A. PERCEPTIONS OF THE BUSINESS ENVIRONMENT AND ECONOMIC TRENDS

100. How has the general economic situation in your economy changed over the past 12 months? Has it deteriorated, remained unchanged or improved?

1. Deteriorated
2. Remained unchanged
3. Improved
4. DK/refuse

101. How do you expect the general economic situation in your place of living to develop over the next 12 months? Will it mostly deteriorate, remain unchanged or improve?

1. Deteriorate
2. Remain unchanged
3. Improve
4. DK/refuse

102. How do you expect the number of people employed in your company to change over the next 12 months?

1. Decrease
2. Remain unchanged
3. Increase
4. DK/refuse

103. Do you believe that your economy is a good place to invest?

1. It is not a good place to invest at all
2. It is mostly not a good place to invest
3. Neither good nor bad place to invest
4. It is mostly a good place to invest
5. It is a great place to invest
6. DK/refuse to answer

104. How has your business situation developed over the past 12 months? Has it deteriorated, remained unchanged or improved?

1. Deteriorated
2. Remained unchanged
3. Improved
4. DK/refuse

105. How important is the quality of regional cooperation in the Western Balkans (Albania, Bosnia and Herzegovina, North Macedonia, Kosovo*, Montenegro, Serbia) to your business?

1. Not important at all
2. Not very important
3. Important
4. Very important
5. DK/refuse

106. Do you think that your economy's EU membership would be/is a good thing, a bad thing, or neither good nor bad for your company?

1. Bad thing
2. Neither good nor bad
3. Good thing

4. DK/refuse

B. BUSINESS TRENDS IN THE WESTERN BALKANS

107. How has the demand for your company's products/services changed over the past 12 months? Has it deteriorated, remained unchanged or improved?

1. Deteriorated
2. Remained unchanged
3. Improved
4. DK/refuse

108. How do you expect the demand for your company's products/services to change over the next 12 months? Will it decrease, remain mostly unchanged or increase?

1. Decrease
2. Mostly unchanged
3. Increase
4. DK/refuse

How has your company's total employment changed over the past 12 months?

1. Decreased
2. Mostly unchanged
3. Increased
4. DK/refuse

109. Could you please tell me what percentage (%) of your company's total investment in 2019 went to each of the following?

1. Property, plant and equipment
2. Intangible assets (e.g. research and development, concessions, patents, licenses, software etc.)
3. Biological assets
4. Long-term financial investments
5. Other (i.e. promotion and marketing, research, staff training, etc.)
6. DK/refuse to answer

110. How have your labour and other costs (e.g. energy, etc.) changed over the past 12 months?

1. Decreased
2. Mostly unchanged
3. Increased

111. Has your business taken any steps to reduce the environmental impact it makes, such as reducing energy consumption, waste reduction or switching to recycled/sustainable materials?

1. Yes - a lot
2. Yes - a little
3. No
4. DK/refuse

C. BUSINESS ENVIRONMENT IN THE WESTERN BALKANS

112. Can you tell me how problematic are these different factors for the operation and growth of your business? Can you please rate each? (1. major obstacle, 2. moderate obstacle, 3. minor obstacle, 4. no obstacle, 5. DK/refuse to answer)

1. Macroeconomic instability
2. Access to land and title or leasing of land
3. Telecommunications, transportation and electricity

4. Customs and trade regulations
5. Informal economy and anti-competitive practices of other competitors
6. Availability of labour
7. Skills and education of available workers
8. Social infrastructure which should enable women to accept and develop leading business positions (maternity leave, kindergartens etc.)
9. Organised crime, street crime, theft and/or violent crime
10. Political or social instability, breakup of law and order and uncertainty about regulatory policies
11. Business licensing and permits
12. Access to financing and cost of financing
13. Labour regulations
14. Contract violations by customers and suppliers and functioning of the judiciary
15. Tax administration and tax rates
16. Corruption
17. Migration crisis
18. Discrimination based on ethnicity, gender, age, sexual orientation, or other
19. Negative image of [ECONOMY] or the Western Balkans region

113. How do you perceive the following factors related to government conduct, based on your experience? Please rate from 1 to 6, where 1 = very negative and 5 = very positive.

1. Governance, public integrity, and corruption	1	2	3	4	5	N/A
2. Transparency of government regulations and decision-making	1	2	3	4	5	N/A
3. Coordination and communication between regulatory authorities	1	2	3	4	5	N/A
4. Predictability and stability of policies, laws and rules	1	2	3	4	5	N/A
5. Predictability in the conduct of public agencies (such as regulatory authorities)	1	2	3	4	5	N/A
6. Existence of effective processes in place for consultation on proposed laws and regulations. These processes include adequate minimum times for consultation, publication of comments received, and requirement to respond to comments.	1	2	3	4	5	N/A
7. Digitalization of public services	1	2	3	4	5	N/A

114. In the process of obtaining licenses for your business, how much of an obstacle were the following factors? Please rate from 1 to 5, where 1= very big obstacle and 5= it's not an obstacle at all (6=N/A).

1. Burdensome number of procedures, requirements, paperwork, and cost	1	2	3	4	5	N/A
2. Lack of availability and accessibility of relevant information	1	2	3	4	5	N/A
3. Excessive discretionary power of government officials and inconsistent application of regulations	1	2	3	4	5	N/A
4. Explicit or implicit norm to give bribes	1	2	3	4	5	N/A
5. Need to rely on personal/ private connections to solve problems	1	2	3	4	5	N/A
6. Lack of a fully digitalized process for application and approval of the licence	1	2	3	4	5	N/A

115. How have the following characteristics of the business environment changed over the last 12 months?

- 1 = Significantly worsened
- 2 = Somewhat worsened
- 3 = Stayed the same
- 4 = Somewhat improved
- 5 = Significantly improved

	NA = Not Applicable					
1. Market size and potential	1	2	3	4	5	N/A
2. Macro-economic stability and favourability of exchange rate	1	2	3	4	5	N/A
3. Availability of labour	1	2	3	4	5	N/A
4. Labour force cost	1	2	3	4	5	N/A
5. Talent and skill of labour pool	1	2	3	4	5	N/A
6. Physical infrastructure (e.g. transportation, telecommunications, electricity, water, etc.)	1	2	3	4	5	N/A
7. Access to land or real estate	1	2	3	4	5	N/A
8. Availability of financial capital in the domestic market	1	2	3	4	5	N/A
9. Political stability and security	1	2	3	4	5	N/A
10. Technological innovation and capabilities	1	2	3	4	5	N/A
11. Tax rates	1	2	3	4	5	N/A
12. Business-friendly legal and regulatory environment	1	2	3	4	5	N/A
13. Availability of linkages with local firms (e.g. obtaining intermediate inputs from domestic suppliers, selling output to local firms, etc.)	1	2	3	4	5	N/A
14. Availability of Government digital service to complete administrative procedures	1	2	3	4	5	N/A
15. Availability of Government support schemes to employ vulnerable groups	1	2	3	4	5	N/A
16. Availability of financial services tailored by industry, i.e. tourism needs special insurance packages, online international payment	1	2	3	4	5	N/A

116. For your business purposes, how would you rate the combination of availability, quality and affordability of road, railroad, waterway and air transport in your economy? Please rate your answer from 1 to 5, where 1 means “very poor” and 5 means “excellent”.

1. Very poor
2. Poor
3. Neither poor nor good
4. Very good
5. Excellent
6. DK/refuse

117. For your business purposes, how would you rate the combination of availability, quality and affordability of electricity, gas and water supply in your economy? Please rate your answer from 1 to 5, where 1 means “very poor” and 5 means “excellent”.

1. Very poor
2. Poor
3. Neither poor nor good
4. Very good
5. Excellent
6. DK/refuse

118. In your opinion, which infrastructure upgrades would have the highest positive impact on your business?

1. Roads
2. Telecommunications
3. Electricity
4. Railroads
5. Gas
6. Air travel
7. Waterway transport
8. Other (specify)

9. DK/refuse

119. How did the Regional Roaming Agreement impact your business operations? It had

1. A very positive impact;
2. Some positive impact;
3. No impact at all

120. How would the complete elimination of roaming charges impact your business operations? It would have

1. A very positive impact;
2. Some positive impact;
3. No impact at all

121. Have any of your company's owners or senior managers spent time living and working abroad as members of the diaspora?

1. Yes
2. No
3. DK/Refuse to answer

D. LEGAL AND REGULATORY FRAMEWORK

122. How much do you feel the Government takes into account the concerns of businesses?

1. Not at all
2. Somewhat
3. Quite a lot
4. Very much
5. DK/refuse

123. What percentage of total annual sales would you estimate a typical company in your area of business reports for tax purposes?

1. _____ %
2. DK/refuse

124. What percentage of the actual wage bill would you estimate a typical company in your area of business reports for tax purposes?

1. _____ %
2. DK/refuse

125. What percentage of the total number of employees would you estimate a typical company in your area of business registers with the relevant authorities?

1. _____ %
2. DK/refuse

126. To what extent do you agree with the following statements? Please use a scale from 1 to 5 where 1 means completely disagree, 2 - tend to disagree, 3 - neither agree nor disagree, 4 - tend to agree and 5 - strongly agree (6 - DK/refuse)

- | | |
|--|---------------|
| 1. Laws and regulations affecting my company are clearly written, not contradictory and do not change too frequently | 1 2 3 4 5 D/K |
| 2. Information on the laws and regulations affecting my company is easy to | 1 2 3 4 5 D/K |

obtain from the authorities

3. The state administration's interpretations of the laws and regulations affecting my company are consistent and predictable 1 2 3 4 5 D/K

127. Do you agree with the following statements? Please use a scale from 1 to 5 where 1 means completely disagree, 2 - tend to disagree, 3 - neither agree nor disagree, 4 - tend to agree and 5 - strongly agree (6 - DK/refuse))

1. Requests for information held by a government agency are granted in timely manner 1 2 3 4 5 D/K
2. The information provided is pertinent and complete 1 2 3 4 5 D/K
3. Requests for information are granted at a reasonable cost 1 2 3 4 5 D/K

128. In the past three years, has your company decided not to take part in a public tender or a public procurement procedure even though you could have offered the goods or services solicited?

1. Yes
2. No
3. DK/refuse to answer

128.a. [IF YES], was it for any of the following reasons?

1. The criteria seemed to be tailor-made for certain participants
2. Unclear selection or evaluation criteria
3. The deal seemed to have been sealed before the tender was published
4. The deadline for submitting the bids were too tight and impossible to meet
5. The procedure seemed too bureaucratic or burdensome
6. Other [specify]
7. None of the above
8. DK/refuse to answer

129. What is the share of the public procurement market in your company's overall turnover last year? (please express the share as a percentage of the total overall turnover) _____%

130. Have you been contacted for any reason by any public procuring entity over the previous 3 years?

1. Yes
2. No

130.a. [IF YES] Over the past three years, how often have public procuring entities been in contact to consult you on the following?

130.a.1. Technical specifications for goods, works or services they intend to purchase:

1. Never
2. Once
3. A few times
4. Often
5. DK Don't know

130.a.2. The drafts of tender documents they prepare:

1. Never
2. Once
3. A few times
4. Often
5. DK Don't know

130.a.3. The drafts of procurement contracts they prepare

6. Never
7. Once
8. A few times
9. Often
10. DK Don't know

130.a.4. Cost estimates for goods, services or works:

1. Never
2. Once
3. A few times
4. Often
5. DK Don't know

131. Have you used guidelines or manuals produced by the national procurement authority in the past three years?

1. Yes
2. No

131.a. [IF YES] In general, how useful were the guidelines and manuals you used for solving your practical problems?

1. Not useful
2. Slightly useful
3. Fairly useful
4. Useful
5. Very useful
6. DK Don't know

132.(NEW) Have you used the standard forms or models provided by the national procurement authority the past three years?

1. Yes
2. No

132.a. [IF YES TO PREVIOUS QUESTION] How would you rate the usefulness of the standard forms or models?

1. Not useful
2. Slightly useful
3. Fairly useful
4. Useful
5. Very useful
6. Don't know

133.(NEW) Have you attended any training on public procurement the past three years?

1. Yes
2. No

133.a. [IF YES TO PREVIOUS QUESTION] How would you rate the usefulness of the training in general?

1. Not useful
2. Slightly useful
3. Fairly useful
4. Useful
5. Very useful

6. DK Don't know

134.(NEW) Have you contacted the national procurement authority for advice or other support in the past three years?

1. Yes
2. No

134.a. [IF YES TO PREVIOUS QUESTION] Were the answers provided generally helpful?

1. No
2. Somewhat
3. Yes
4. DK Don't know

135. Could you please tell me how satisfied are you with each of the following in [ECONOMY] Please use a scale from 1 to 5 where 1 means completely dissatisfied, 2- tend to be dissatisfied, 3 – neither satisfied nor dissatisfied, 4 – tend to be satisfied and 5 - strongly satisfied)

1. Public services for businesses
2. Digital services currently provided by the public administration for businesses

136. To what extent are you satisfied with how the government consults and involves private sector when developing new laws and regulations relevant for doing business? Please use a scale from 1 to 5 where 1 means not satisfied at all, 2 - not satisfied, 3 – neither satisfied nor unsatisfied, 4 – satisfied and 5 - fully satisfied (6 – DK/refuse...).

1. Not satisfied at all
2. Not satisfied
3. Neither satisfied nor unsatisfied
4. Satisfied
5. Fully satisfied
6. DK/refuse

137. Which regulations do you consider to be an obstacle to the success of a business? Please choose 2 answers.

1. Minimum wage regulations
2. Health and safety regulations
3. Environmental regulations
4. Pensions
5. Planning/building/development
6. Tax-related
7. Employment regulations
8. Providing information/record-keeping
9. Trading standards
10. Working time
11. No specific regulations/all regulations
12. None – no regulations an obstacle
13. DK/refuse

138. Has your company had any cases in arbitration courts in the last 36 months?

1. Yes
2. No
3. DK/refuse to answer

138.a. [IF YES] How many cases in civil or commercial arbitration courts have involved your company either as a plaintiff or defendant in the last 36 months?

1. No. of cases _____
2. DK/refuse to answer

139. Do you agree or disagree with the following statements about State aid? (Please use a scale from 1 to 5 where 1 means completely disagree, 2 - tend to disagree, 3 – neither agree nor disagree, 4– tend to agree and 5 - strongly agree (6 – DK/refuse)):

- | | | | | | | |
|---|---|---|---|---|---|-----|
| 1. Citizens and companies have full access to information related to state aid policies and grants awarded to companies by the public authorities | 1 | 2 | 3 | 4 | 5 | D/K |
| 2. Sufficient information on the state aid given to companies by the public authorities is already publicly available | 1 | 2 | 3 | 4 | 5 | D/K |
| 3. Information about state aid received by companies should remain confidential between public authorities and companies | 1 | 2 | 3 | 4 | 5 | D/K |

E. ACCESSIBILITY OF LOANS

140. What proportion of your company's working capital and new fixed investment has been financed from each of the following sources, over the past 12 months?

1. Internal funds/retained earnings
2. Borrowing from local private commercial banks
3. Borrowing from foreign banks
4. Equity (through share issues in the capital market, equity investment by institutional investors, or private placement to individuals)
5. Borrowing from state-owned banks, including state development banks
6. Loans from family/friends
7. Money lenders or other informal sources (other than family/friends)
8. Trade credit from suppliers
9. Trade credit from customers
10. Factoring arrangements or selling accounts receivable
11. Credit cards
12. Leasing arrangement
13. The government (other than state-owned banks)
14. Other (SPECIFY SOURCES)
15. DK/refuse

141. Which of the following sources of finance has your company used over the past five years? [MULTIPLE ANSWERS]

1. Internal funds/retained earnings
2. Borrowing from local private commercial banks
3. Borrowing from foreign banks
4. Equity (through share issues in the capital market, equity investment by institutional investors, or private placement to individuals)
5. Borrowing from state-owned banks, including state development banks
6. Loans from family/friends
7. Micro-loans from microcredit organizations
8. Money lenders or other informal sources (other than family/friends)
9. Trade credit from suppliers
10. Trade credit from customers
11. Factoring arrangements or selling accounts receivable
12. Credit cards
13. Leasing arrangement
14. The government (other than state-owned banks)
15. Other (SPECIFY SOURCES)
16. DK/refuse

142. Has your company applied for a loan from a bank in the past 12 months?

1. Yes
2. No
3. DK/refuse...

142.a. (THOSE WHO HAD APPLIED FOR A LOAN) How many days did it take to agree the loan with the bank from the date of application?

1. _____ days
2. The loan was not approved
3. DK/refuse

142.a.1. (THOSE WHOSE LOAN WASN'T APPROVED) You said that your company's loan application was rejected, what was the main reason for this?

1. Perceived lack of profitability of the company
2. Lack of acceptable collateral
3. Inadequate credit history of the company
4. Incomplete loan application
5. Others (Specify)
6. DK/refuse

F. CORRUPTION

143. Thinking about officials, to what extent would you agree with the following statements? Please use a scale from 1 to 5 where 1 means completely disagree, 2- tend to disagree, 3 – neither agree nor disagree, 4 – tend to agree and 5-strongly agree (6 – DK/refuse).

1. It is common for companies in my line of business to have to pay some irregular “additional payments/gifts” to “get things done”.
2. Companies in my line of business usually know in advance how much this ‘additional payment/gifts’ will cost.

144. Thinking now of unofficial payments/gifts that companies like yours would make in a given year, could you please tell me how often would they make payments/gifts for the following purposes? Please rate your answer from 1 to 4, where 1 means never, 2 - seldom, 3 – frequently and 4 – always (5 – DK/refuse).

1. To get connected to and maintain public services
2. To obtain business licenses and permits
3. To obtain government contracts
4. To deal with occupational health and safety inspections
5. To deal with labour inspections
6. To deal with fire and building inspections
7. To deal with environmental inspections
8. To deal with taxes and tax collection
9. To deal with customs/imports
10. To deal with courts
11. To influence the content of new legislation, rules, decrees, etc.

144.a. [FOR ALL RESPONDENTS EXCEPT THOSE ANSWERING NEVER OR DK/REFUSE AT THE PREVIOUS QUESTION] Please estimate what is the approximate amount of unofficial payments/gifts that companies like yours would make in a given year for the **above noted purposes. (Open-ended question)**

1. _____ EUR
2. DK/refuse

145. In different societies, there are different views on the most effective ways to stop wrongdoing. Which one of these do you think is the most effective way in <ECONOMY> society? (Select one answer)

1. By reporting serious wrongdoing to people in authority, via official channels
2. By reporting serious wrongdoing to journalists or news organizations
3. By reporting serious wrongdoing directly to the general public, via Internet, Twitter, Facebook or online blogs
4. Some other way

5. None of the above – in <Country> society, there is no effective way to stop wrongdoing
6. DK/refuse to answer

146.NEW: To what extent do you believe the digitalization of public services would have appositve impact in preventing corruptive practices?

1. To a great extent;
2. To a marginal extent
3. It will have no impact

G. TRADE AND INVESTMENT

147.Has your company invested abroad, or plans to do so in the next 12 months?

1. Yes
2. No

147.a. Where did you invest or plan to do so?

1. In the Western Balkans region
2. In the EU
3. Elsewhere

147.b. Which of the following reasons best describes your company's motivation to invest abroad? Please rank your answers with 1 being most important and 5 being least important.

1. To access new markets
2. To lower production costs
3. To better integrate your company's value chain
4. To access natural resources and raw materials
5. To acquire or complement new technologies or brand

147.c. In the process of choosing where to invest, how important were the following factors? Please use a scale from 1 to 5 where 1 means – not important at all, and 5 means – very important (6 – DK/ refuse)

1. Market size and potential
2. Macro-economic stability and favourability of exchange rate
3. Labour force cost
4. Talent and skill of labour pool
5. Physical infrastructure (e.g. transportation, telecommunications, electricity, water, etc.)
6. Access to land or real estate
7. Availability of financial capital in the domestic market
8. Political stability and security
9. Technological innovation and capabilities
10. Tax rates
11. Business-friendly legal and regulatory environment
12. Availability of linkages with local firms (e.g. obtaining intermediate inputs from domestic suppliers, selling output to local firms, etc.)

148.What percentage of your company's sales are made domestically, exported to the Western Balkans region, the EU or to the third countries? [Record percentage]

1. Sold domestically
2. Exported to the Western Balkans region
3. Exported to the EU
4. Exported to third countries

[FOR THOSE WHO DON'T EXPORT]

149. Why doesn't your company export? (Read the answers, multiple answers except in case of first answer)

1. We don't have any plans/interest to export
2. We don't have capacities to export (e.g. manufacturing, financial, transport capacity; human resource, etc.)
3. We don't know how to export
4. Our goods/services aren't suitable for export
5. We don't know how to find foreign partner
6. There is no competent authority in _____ (*insert the economy*) that could provide relevant information on export procedure
7. Complicated administrative procedures
8. Linguistic barrier
9. Other _____ (*please specify*)
10. DK/refuse to answer

150. What percentage of your company's inputs and supplies are:

1. Purchased from domestic sources
2. Imported from the Western Balkans region
3. Imported from the EU
4. Imported from third countries

151. What percentage of your domestic sales are made to:

1. Government or government agencies
2. Your company's parent company or affiliated subsidiaries
3. Multinationals located in your economy
4. State owned or controlled enterprises
5. Large private domestic companies
6. Small companies and individuals
7. Other

152. If you have imported goods in the past 12 months, what is the average number of days to clear imports through customs?

1. Up to 2 days
2. 3 - 5 days
3. Over 5 days
4. Have not imported goods
5. DK/refuse

153. If you have exported goods in the past 12 months, what is the average number of days to clear exports through customs?

1. Up to 2 days
2. 3 - 5 days
3. Over 5 days
4. Did not export goods
5. DK/refuse

154. If your company exports to the Western Balkans region, what are the main obstacles to your exports?

1. Need to hardcopy documents or certificates
2. Need for licenses or permits
3. Obscure or inconsistent rules of origin
4. Unnecessary physical examinations or inspections
5. VAT
6. Slow import-export procedures
7. Wide variability in clearance time
8. Classification uncertainty
9. Custom delays

10. Risks of unclear compliance rules
11. My company doesn't export to the Western Balkans region

155. To what extent do you agree that your company is threatened by global competition? Please use a scale from 1 to 4, where 1 means totally disagree, 2 – disagree, 3 – agree and 4 means totally agree.

1. Totally disagree
2. Disagree
3. Agree
4. Totally agree
5. DK/refuse to answer

156. To what extent do you agree that your company is threatened by competition from the Western Balkans region? Please use a scale from 1 to 4, where 1 means totally disagree, 2 – disagree, 3 – agree and 4 means totally agree.

1. Totally disagree
2. Disagree
3. Agree
4. Totally agree
5. DK/refuse to answer

157. To what extent do you agree with the following statements? (Please use a scale from 1 to 4, where 1 means totally disagree, 2 – disagree, 3 – agree and 4 means totally agree.) My company's products, goods and services can compete well with products, goods and services from the Western Balkans.

1. Totally disagree
2. Disagree
3. Agree
4. Totally agree
5. DK/refuse to answer

158. My company's products, goods and services can compete well with products, goods and services from other EU countries.

1. Totally disagree
2. Disagree
3. Agree
4. Totally agree
5. DK/refuse to answer

159. To what extent do you agree with the statement "My company has benefited from the regional free trade agreement (CEFTA 2006)". Please use a scale from 1 to 4, where 1 means totally disagree, 2 – disagree, 3 – agree and 4 means totally agree.

1. Totally disagree
2. Disagree
3. Agree
4. Totally agree
5. DK/refuse to answer

160. If your company is an exporter, could you tell us whether it is easier to export to the CEFTA region (Albania, Bosnia and Herzegovina, North Macedonia, Kosovo*, Moldova, Montenegro, Serbia) or the EU?

1. It is easier to export to the CEFTA region (Albania, Bosnia and Herzegovina, North Macedonia, Kosovo*, Moldova, Montenegro, Serbia)
2. It is easier to export to the EU
3. It's the same
4. DK/refuse

161. In your opinion, when procuring products and services, should the governments in the region give priority to local suppliers or should they be treated the same as all other suppliers (provided price and quality is equal)?

1. Local suppliers should be given priority
2. Local suppliers should be treated the same as foreign suppliers
3. DK/refuse

162. In your opinion, when procuring products and services, should the governments in the region give preferential treatment to suppliers which are social businesses or should they be treated the same as all other suppliers (provided price and quality is equal)?

1. Social businesses suppliers should be given preferential treatment
2. Social businesses suppliers should be treated same as all other suppliers
3. DK/refuse

163. (THOSE WHO CAN ANSWER) In your opinion, which market in the Western Balkans region is the most open one? Please give us your opinion no matter whether you/your company had direct experience with it. Rank these 7 markets from 1 (most open) to 7 (least open).

1. Albania (market)
2. Bosnia and Herzegovina (market)
3. Kosovo* (market)
4. North Macedonia (market)
5. Montenegro (market)
6. Serbia (market)

H. INNOVATION AND TECHNOLOGY

164. Does your company use Internet for...?

1. Communication (email, skype, etc.)
2. Advertising on Facebook, YouTube, GoogleAds, etc.
3. Selling your goods or services over the Internet
4. Purchasing goods or services for your company over the Internet
5. Executing banking or financial transactions online
6. Presenting your company through company website
7. Communication with customers/clients/partners through social networks (Facebook, Twitter, LinkedIn, etc.)
8. Provision of customer services or support online
9. Online trainings – internal (organized by your company) or external ones
10. Searching the Internet for innovative ideas, new trends, partners etc.
11. Data storage (i.e. the cloud), web-based applications or other internal operational needs
12. We don't use Internet
13. DK/refuse

164.a. (EXCEPT THOSE WITH CODES 11 AND 12 ON 61) (NEW) [IF RESPONDENT SELLS GOODS AND SERVICES ONLINE] What percentage of your total sales is currently generated through online sales?

1. Less than 5%
2. Between 5-20%
3. Between 20-50%
4. More than 50%

165. (EXCEPT THOSE WITH CODES 11 AND 12 ON 61) (NEW) In the last six months, have you experienced any of the following Internet security problems?

1. Viruses
2. Illegal access
3. Attacks on your network
4. ID misrepresentation/theft

5. Other

166.(EXCEPT THOSE WITH CODES 11 AND 12 ON 61) (NEW) Are you satisfied with your Internet connection?

1. Yes
2. No
3. I don't use the internet

167.(EXCEPT THOSE WITH CODES 11 AND 12 ON 61) (NEW) Which feature is the most important aspect for you regarding your internet access? (single answer)

1. Price level
2. Speed / bandwidth
3. Reliability / stability of connection
4. Coverage in your country
5. Other

168.In the past 3 years, did you cooperate with any of the universities on research and development (R&D) or technology development projects to help develop new products or services?

1. Yes
2. No
3. DK/refuse

169.Have you introduced new or significantly improved products and/or services in the past twelve months?

1. Yes
2. No
3. DK/refuse

169.a. [IF YES] Who developed these product innovations?

1. Your enterprise by itself
2. Your enterprise together with other enterprises or organizations
3. Your enterprise by adapting or modifying goods or services originally developed by other enterprises or organisations
4. Other enterprises or organisations

169.b. Were any of your product innovations (goods or services) (SINGLE ANSWER):

1. New to your market? Your enterprise introduced a new or significantly improved product onto your market before your competitors (it may have already been available in other markets)
2. Only new to your enterprise? Your enterprise introduced a new or significantly improved product that was already available from your competitors in your market
3. DK/refuse

169.c. To the best of your knowledge, were any of your product innovations during the three years 2017 to 2019: (One answer per row)

- | | | | |
|-------------------------|-----|----|-----------|
| 1. A first in [ECONOMY] | Yes | No | DK/refuse |
| 2. A first in Europe | Yes | No | DK/refuse |
| 3. A first in the World | Yes | No | DK/refuse |

170.Have you introduced new or significantly improved products and/or service delivery processes in the last three years (2017-19)?

1. Yes
2. No
3. DK/refuse

170.a. [IF YES] Who developed these process innovations? Select all that apply.

1. Your enterprise by itself
2. Your enterprise together with other enterprises or organisations*
3. Your enterprise by adapting or modifying processes originally developed by other enterprises or organisations*
4. Other enterprises or organisations*

**: Include independent enterprises plus other parts of your enterprise group (subsidiaries, sister enterprises, head office, etc). Organisations include universities, research institutes, non-profits, etc.*

170.b. Were any of your process innovations introduced during the three years 2017 to 2019 new to your market?

1. Yes
2. No
3. Don't know

171. During the past three years (2017 to 2019), did your enterprise receive any public and/or donor's financial support for innovation activities from the following levels of government? (Include financial support via tax credits or deductions, grants, subsidised loans, and loan guarantees. Exclude R&D and other innovation activities conducted entirely for the public sector* under contract.)

1. Local or regional authorities
2. Central government (including central government agencies or ministries)
3. The European Union (EU) or other donors

**The public sector includes government owned organisations such as local, regional and national administrations and agencies, schools, hospitals, and government providers of such as security, transport, housing, energy, etc.*

I. HUMAN CAPITAL

172. What percentage of your company's workforce has the following education levels?

1. Without or unfinished primary school
2. Primary school
3. Vocational qualification
4. Secondary school qualification
5. University education or higher
6. DK/refuse

173. Would you agree with the following statement: the skills taught in the educational system meet the needs of your company? Please rate your answer from 1 to 5, where 1 means fully disagree, 2-disagree, 3 – neither agree nor disagree, 4 – agree and 5 means fully agree (6 – DK/refuse to answer)

1. Fully disagree
2. Disagree
3. Neither agree, nor disagree
4. Agree
5. Fully agree

174. How likely would you hire young person whose educational profile completely meets the needs of your business, but without work experience?

1. Not likely at all
2. Not likely
3. Neither likely nor unlikely
4. Likely
5. Very likely
6. DK/refuse to answer

175. Do you already have, or plan to introduce in your company, an internship or apprenticeship program?

1. Yes
2. No
3. DK/refuse

176. How important are digital skills for your company?

1. Very important
2. Somewhat important
3. Not important

176.a. [IF VERY IMPORTANT OR SOMEWHAT IMPORTANT] Do you take concrete measures to improve the digital skills of your employees [MULTIPLE CHOICE]?

1. Yes, through on the job training or internal training;
2. Yes, through online courses or webinars
3. Yes, through workshops, seminars or conferences
4. No
7. Other _____

177. Did you have vacancies over the past 12 months that have proved hard to fill?

1. Yes
2. No
3. DK/refuse

177.a. [IF YES TO ABOVE QUESTION] Why do you think this is the case?

1. Applicants lack skills
2. Salary and compensation offered by the company is not competitive
3. Other
4. DK/refuse

178. Over the past 12 months, has your business funded or arranged any training and development for staff in the organisation, including any informal on-the-job training, except training required by the law?

1. Yes
2. No
3. DK/refuse

179. Thinking about skills requirements, does your company regularly review the skill and training needs of individual employees?

1. Yes
2. No
3. Partly (e.g. only for some employee groups)
4. DK/refuse

180. How would you assess the readiness of employees in your company to acquire additional qualifications in order to advance and get promoted?

1. They are not interested in acquiring additional qualifications at all
2. They are not interested in acquiring additional qualifications
3. Neither interested nor disinterested
4. They are interested in acquiring additional qualifications
5. They are very interested in acquiring additional qualifications
6. DK/refuse

181. In your opinion, what are the most effective ways to increase the number of women in the labour market?

1. Making sure women earn the same as men for the same work
2. Making child care more accessible (e.g. without waiting list in kindergartens, increasing the number of nurseries and kindergartens etc.)
3. Increasing flexible work arrangement (e.g. part-time work, working from home)
4. Making it easier for women to combine a job with household and care responsibilities
5. Making sure that recruitment procedures do not discriminate against women
6. Improve access for women to better quality jobs
7. Making sure it is beneficial financially to work for women (by changing rules on taxes and social benefits)
8. Improving access for women to traditionally "male jobs"
9. Making employers aware of the benefits of employing and promoting women (e.g. their openness and accessibility in communication, responsibility, empathy, sense for details etc.)
10. DK/refuse to answer

J. EMPLOYMENT PRACTICES

182. How often do you use the following when hiring new employees? Please mark each of the following method with 1 - often, 2- sometimes or 3 – never (4 – DK/refuse).

1. Personal contact (following recommendations of friends and colleagues)
2. Placing advertisements in the papers and/or online
3. Intermediation of the official employment agency Cooperating directly with education institutions
4. Intermediation of private employment agencies and/or "head hunters" "Poaching" employees from competitors

183. If you could change the number of full-time workers your company currently employs without any restrictions, what would be your optimal level of employment as a percent of your existing workforce? Would you decrease, increase or retain the same level of employees?

1. Decrease _____ %
2. Increase _____ %
3. Retain the same level
4. DK/refuse

184. Out of the total number, how many of your employees are men and how many women?

1. Men _____ %
2. Women _____ %

185. How likely would you hire a Roma person whose educational profile and experience completely meet the needs of your business?

1. Not likely at all
2. Not likely
3. Neither likely nor unlikely
4. Likely
5. Very likely
6. DK/refuse to answer

186. In your opinion, do companies like yours have a gender preference in terms of hiring?

1. Yes, they would rather hire women
2. Yes, they would rather hire men
3. They have no preference
4. DK/refuse

187. Do you have somebody from the below mentioned vulnerable groups working in your company?

1. Persons with disabilities (including persons with special needs)
2. Displaced persons or refugees
3. Roma

4. Other ethnic minorities
5. No, there are no members of the listed groups working in my company
6. DK/refuse

188. How likely would you employ workers from abroad in your company?

1. Not likely at all
2. Not likely
3. Neither likely nor unlikely
4. Likely
5. Very likely
6. DK/refuse to answer

189. How likely would you employ workers from the region in your company?

1. Not likely at all
2. Not likely
3. Neither likely nor unlikely
4. Likely
5. Very likely
6. DK/refuse to answer

189.a. [FOR RESPONDENTS ANSWERING YES TO PREVIOUS QUESTION] You said that you would employ workers from the Western Balkans region in your company. From which economy/economies exactly would you hire?

1. Albania
2. Bosnia and Herzegovina
3. Kosovo*
4. North Macedonia
5. Montenegro
6. Serbia
7. DK/refuse to answer

190. Do you think that employing Roma persons would affect company sales or the working environment in a positive or a negative way?

1. Positive
2. Negative
3. Would have no effect
4. DK/refuse to answer

191. Have you heard of the Regional Cooperation Council?

1. Yes
2. No

Sample structure:

- Sample structure by respondent's position: Owner/proprietor; Director; Manager; Chief Executive; Finance Officer; Partner; General Manager; Vice President; President.
- Sample structure by largest shareholder: individual; family; domestic company; foreign company; employees of the company; company managers; investment fund; bank; other (specify).
- Sample structure by no. of employees: 4 – 9; 10 – 49; 50 – 249; 250+
- Sample structure by business areas: agriculture, hunting, fishing and forestry; industry, mining, construction; transport, trade, tourism, catering industry, crafts, banking, public utilities.

- Sample structure by ownership: private domestic individual(s)/company(s)/organisation(s); private foreign individual(s)/ company(s)/organisation(s).