



BALKAN BAROMETER

INFOGRAPHICS

Pocket edition

2019



This project is funded by the European Union

good.better.regional.



BALKAN BAROMETER

PUBLIC AND BUSINESSES
VIEWPOINTS

- ◆ Balkan Barometer - annual survey of public opinion and business sentiments in six Western Balkans economies, commissioned by the Regional Cooperation Council (RCC)
- ◆ Balkan Barometer - examining aspirations and expectations on life and work, prevalent socio-economic and political trends & regional and European integration
- ◆ Balkan Barometer pocket edition - features some of the defining thoughts of citizens and businesses on prevailing issues facing our region through infographics
- ◆ Balkan Barometer 2019 - conducted by IPSOS, Outbox Consulting and CEVES among 6,120 citizens and 1,271 companies at the end of 2018 throughout the region

Download Balkan Barometer at www.rcc.int

Public Opinion Survey <http://www.rcc.int/seeds/results/2/balkan-opinion-barometer>

Business Opinion Survey <http://www.rcc.int/seeds/results/3/balkan-business-barometer>

CONTENT



- 5 Highlights
- 13 Balkan Sentiment & Life Satisfaction Index
- 17 Regional Cooperation & EU Integration
- 23 Employment & Life Quality
- 31 Employability
- 35 Digital Agenda
- 43 Mobility
- 49 Tourism and Travel
- 53 Social Inclusion of Vulnerable Groups
- 59 Youth
- 63 Trade
- 69 Transport and Infrastructure
- 75 Climate Change and Energy
- 79 Public Administration and Services
- 91 Security
- 93v The Most Striking Perceptions in Each of Western Balkans Economies

HIGHLIGHTS

- ◆ The fifth in a row iteration of the survey, Balkan Barometer 2019 reveals that the satisfaction with the current state of affairs continues to grow, albeit at an unremarkable and uneven pace across the region, although optimists now outnumber the pessimists among those who expect to see changes.
- ◆ Majority of business respondents expect to hire new employees and further expand their business operations.
- ◆ Unemployment and the overall economic situation remain the region's chief concerns although anxiety over the former has been downgraded over time. Brain drain is, however, increasingly recognised as a problem across the region, and willingness to work abroad has surged markedly in the course of one year. Unease over corruption is also on the rise, while interestingly, businesses see digitalisation as an efficient way of tackling corruption.
- ◆ Encouragingly, backing for EU membership continues to grow at an accelerated pace with this being the first survey instalment where more than half of all respondents view EU accession favourably. Regional cooperation remains important to an overwhelming majority of respondents across the Balkans.
- ◆ The citizens' relationship with public institutions continues to be characterised by a high degree of distrust that extends to all three branches of government.

UNEMPLOYMENT

with **60%**, and the overall

ECONOMIC with
SITUATION

remain

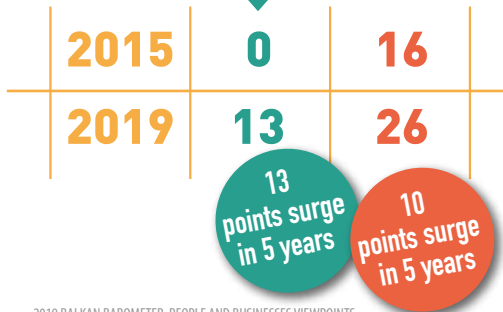
DOMINANT CONCERNS

for the people in the Western Balkans!

47%



Unease over **BRAIN DRAIN**



and **CORRUPTION**
on the rise! ‡

SUPPORT


in the **WESTERN BALKANS**
for **EU MEMBERSHIP GROWS!**

**For the first time
more than half
of all respondents view EU
accession favourably**

56%

compared to 42% in 2015



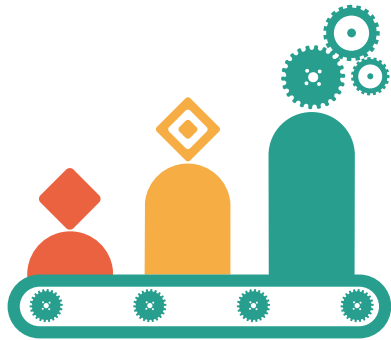
74% 

of people

in the Western  **BALKANS** say

REGIONAL COOPERATION
is important to them!

For the **FIRST TIME** ever,
a plurality of respondents in the Western Balkans,



27%

consider **WORKING HARD**

to be the most important factor
in **GETTING AHEAD** in life,
more important than knowing the right people,
belonging to a wealthy family or being lucky.

58% → a majority of
Western Balkans businesses
see **DIGITALISATION** of public services

as the key to increase

TRANSPARENCY

and predictability of government conduct
- showing the way how to cut back
on **CORRUPTION**



Overwhelming **LACK** **OF CONFIDENCE** in the rule of law across the Western Balkans

70%

think
laws are **NOT**
applied

EQUALLY to all,



while

59%

believe
laws are **NOT**
applied

EFFECTIVELY

BALKAN
SENTIMENT

& Life Satisfaction Index

Overall level of satisfaction → **steadily improving**

→ **Balkan Public
Sentiment Index (BPSI)
has risen by 9 points**

from 35
in BB 2015

to

44

points

in BB 2019

**ENCOURAGING,
but still under 50 points!**

on a scale from 1 to 100

Balkan Business Sentiment Index

overwhelmingly

POSITIVE

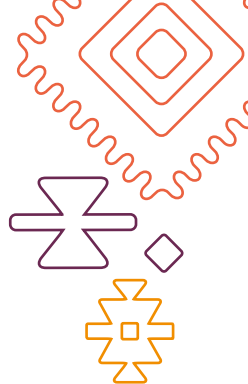
at

61

points

In 2015 it stood at only 47 points

on a scale from 1 to 100





REGIONAL
COOPERATION
& EU Integration



REGIONAL COOPERATION

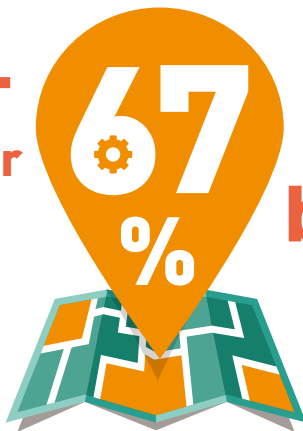
remains important

for **74%** of people

in the Western Balkans!

QUALITY of REGIONAL COOPERATION

IMPORTANT
for



of Western Balkans
businesses!

Support for **EU MEMBERSHIP**

in the Western Balkans grows!

For the first time more than half of all respondents view **EU accession favourably**



56%

compared to 42% in 2015

EU MEMBERSHIP is viewed

as a **GOOD** thing by

61%

of young people
in the Western Balkans,
compared to overall 56%



64%

of Western Balkans **businesses**

feel EU ACCESSION

would be

BENEFICIAL

to their **company!**



EMPLOYMENT



MENT

& Life Quality

69% of people in the Western Balkans estimate their **SOCIO-ECONOMIC** status as **“average”**,

while **26%** report their status as **“below average”**

→ a mirror image of 2018 BB results





8% drop in EMPLOYMENT figures!

2019 - only

34%

**of people in
the Western Balkans
declare themselves
EMPLOYED!**

2018 - 42%



23% of all households
in the Western Balkans report



**no members
employed**

→ 3% more than in BB 2018

46%

of people in the Western Balkans were **UNABLE to afford A WEEK-LONG HOLIDAY** away from home in the past year



19%

were **UNABLE to pay RENT/** utilities



19%

struggled to keep their homes warm



16%

were **UNABLE to afford BASIC SUPPLIES**



14%

missed LOAN payments



Almost

40%

of Western Balkans

BUSINESSES

EXPECT TO

EMPLOY

new workers

in the coming year!





EMPLOYABILITY 

For the first time ever,

a plurality of respondents in the Western Balkans,

27%

consider WORKING HARD to be

the **most important** factor in getting ahead in life,

more important than

knowing the right people (**26%**)

having a good education (**23%**)

being lucky (**14%**)

or belonging to a wealthy family (**7%**)



58%

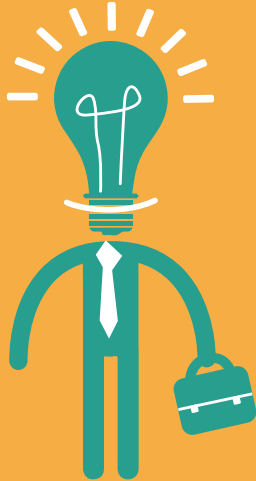
of people in the Western Balkans

consider the **SKILLS** acquired
through **FORMAL EDUCATION**
to be **ADEQUATE**
to their present **JOB** requirements

(down from 64% in BB 2017)



Slightly more than a half
of the Western Balkans
business leaders,



52%

look favourably
on the **SKILLS** employees
ACQUIRED through the education system,
while **21%** reported **dissatisfaction**



DIGITAL AGENDA

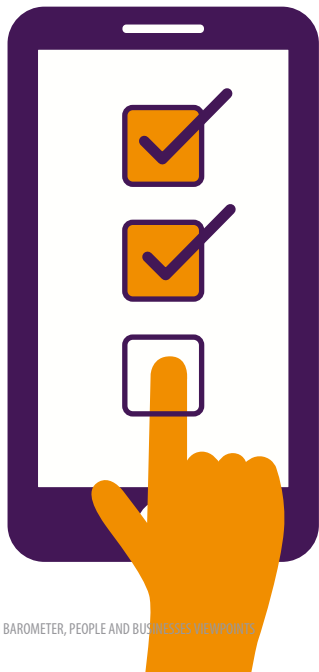
54%

of people in the Western Balkans
say they primarily use
INTERNET
as communication tool



for **37%** it's a source of news

and **35%** use it
for entertainment



Just **4%**
of people in
the Western Balkans say they are
paying bills ONLINE,
while only **2%**
are using e-government services

26% of people in
the Western Balkans
say they are
NOT USING Internet
at all




45% of people in
the Western Balkans

are concerned about
DATA SECURITY
on the Internet,

while **25%** worry
about security of **ONLINE** payments



46%


of Western Balkans
businesses say

**advertising and direct communication
with customers via**

Facebook, YouTube or Instagram

is **IMPORTANT**



➔ **3% uptake since BB 2018**

OVERWHELMING majority

of Western Balkans businesses,

70%
say

removal of roaming charges
would be **BENEFICIAL**

- huge uptake compared to **56%** in BB 2018





MOBILITY 

1 in 10



Western Balkans citizens

would consider **leaving and working**
in another place in **SOUTH EAST EUROPE,**

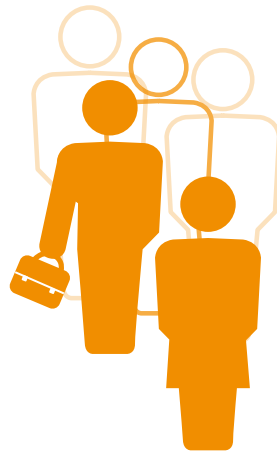
out of which **52%** are still just **THINKING** about it

2/5

of people in
the **Western Balkans**

say they would consider **leaving**
and **WORKING ABROAD**

- a sizable **7%** drop since BB 2017



60% of those are still just **THINKING** about it,

36%


of the **Western Balkans** citizens
think it is **GOOD**

that people from other
parts of the region
are coming to
live and work
in their **economy**

→ **8%** uptake since BB2016!



Almost half,

 **48%**

the Western Balkans
businesses



would likely

EMPLOY

a **qualified worker**
from **another** economy
from the region



TOURISM
AND TRAVEL

53% of **people** in the Western Balkans say
they **TRAVELLED**
for leisure within the region,

while **32%**
were
visiting family





41%

of Western Balkans citizens

feel **WELCOME**

in **any city** in the **region**



More than half
of the region's population,

57%

do **not differentiate**

between **TOURISTS**
from the **Western Balkans**
and those from elsewhere in the world

SOCIAL INCLUSION of Vulnerable Groups



of people in the Western Balkans
are comfortable with their
children going to school
with **Roma children**



are **comfortable**
working with Roma



are **comfortable working**
for Roma employer



feel comfortable
inviting Roma to their house
or buying products from Roma

And



are **comfortable**
marrying Roma/their children
marrying Roma

12%

of Western Balkans

BUSINESSES

say they

WOULD NOT

hire **ROMA**



40%



of the Western Balkans business leaders
have GENDER preferences – and among those,
twice as many would hire a MAN!

But for majority, **59%** **gender does not play** any role

62%

of Western Balkans
businesses say
EMPLOYEES
in companies are
MEN



2/3 or **67%**

of Western Balkans **businesses**
say they **DO NOT EMPLOY**
members
of **socially VULNERABLE** groups



YOUTH

Almost **HALF OF** respondents

aged
18 to **24**



would prefer **TO WORK** in **public sector**,
specifically government or its agencies,
public education or health, law enforcement, etc.

In terms of political engagement

APATHY is **WIDESPREAD**
among Western Balkans youth

- they participate **significantly less** in **active** forms
of engagement with **government decisions**



AND

42%

say that is because
**“THEY DON’T CARE
at all”.**



T→**R** **A** **D** **E**

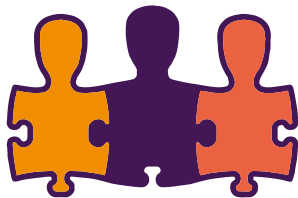
53%

of Western Balkans citizens

BELIEVE

**commercial and trade links
within the region need**

IMPROVEMENT



68% of people
in the Western Balkans

expect consumers

to **BENEFIT** →

from entry of **foreign companies**
into **domestic** markets



80% of people in the Western Balkans **believe products** from their economies

can **MEASURE UP** to competitors in the region



feel the same about **products from the EU**

➤ **sizable decrease in product confidence since BB2017 against both competitors in the region (-9%) and those from the EU (-6%).**

48%

of Western Balkans business leaders

still see their economy as a

GOOD PLACE

to invest,

➔ an increase of 3 points since 2017, while one quarter doesn't



Only **9%**

of Western Balkans companies
have

INVESTED ABROAD

or plan to do so
in the next **12 months**



T  **R** **A** **N** **S** **P**  **O** **R** **T**

and Infrastructure



54%

of **people** in the Western Balkans **use a car** when **TRAVELLING**



28%

use a bus

while only

2%

use plane,



although this percentage doubled compared to the previous years

While

56%

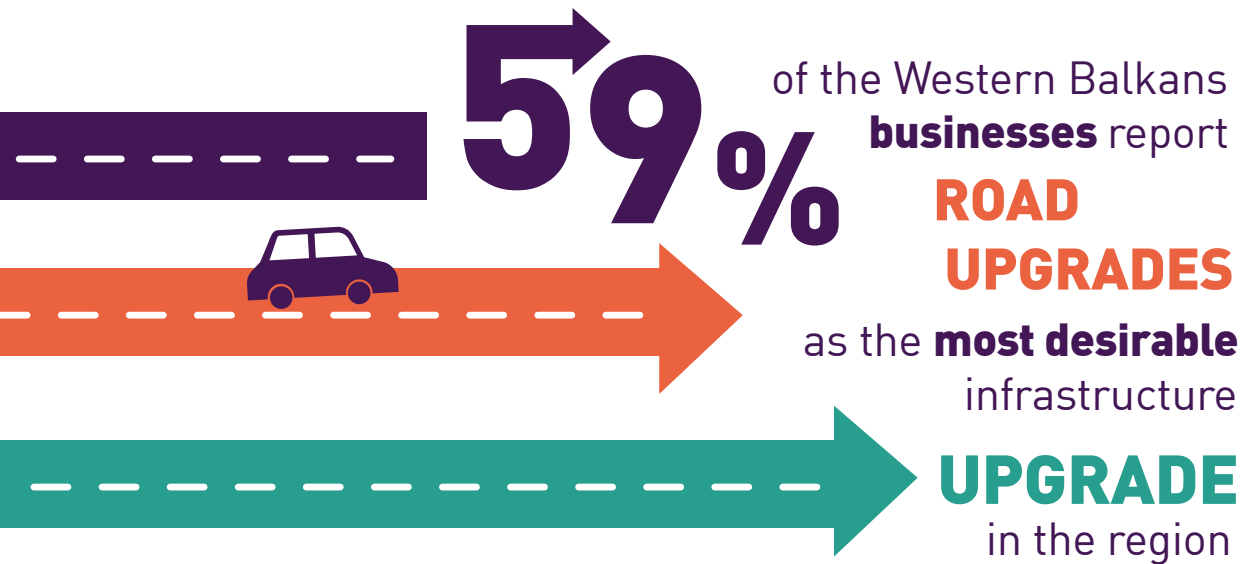
of the Western Balkans citizens say they are **HAPPY** with the **transport infrastructure**.

a sizable proportion,

41%

consider its quality to be **poor** or **VERY POOR**





(considerably higher than 53% in 2018)



The logo features the text "CLIMATE CHANGE AND ENERGY" in a bold, sans-serif font. The word "CLIMATE" is split into "CLIM" (orange) and "ATE" (teal), with a white vertical bar containing three upward-pointing triangles above the "I". The word "CHANGE" is orange. "AND ENERGY" is white. A yellow arrow points down from the "M" in "CLIMATE" to the "A" in "AND".

**CLIMATE CHANGE
AND ENERGY**

Close to **2/3** or

65%

of the Western Balkans population

consider
CLIMATE CHANGE
a threat





23%

of the **Western Balkans** companies report taking major steps towards **reducing ENVIRONMENTAL footprint**

41%

had some activities



While
34%
had **NO ACTION**
taken at all **to reduce ENVIRONMENTAL IMPACT**

PUBLIC ADMINISTRATION AND SERVICES

(independence, freedom, corruption)

SMALL increase in **SATISFACTION** with government performance

When asked 'how would you grade the following issues',
Western Balkans citizens said:

	BB 2015	BB 2019
Treatment of citizens in public sector	2.3	2.6
Time required for obtaining public services	2.4	2.6
Time required for getting information in public sector	2.4	2.5
Price of public services	2.2	2.4

[scores from 1 to 5]



Only **13%** of people in the Western Balkans

get their personal documents

ONLINE

while close to a **third,**

32% think this is not possible at all



Just over half of the Western Balkans citizens,

51%

are **satisfied** with the

EFFICIENCY

**of administrative procedures
in the public sector**

➔ **an 16-point increase since BB 2015**



59%

of the Western Balkans citizens
feel that laws are not applied

EFFECTIVELY



70%

of the Western Balkans citizens
feel that **laws are not applied**

EQUALLY



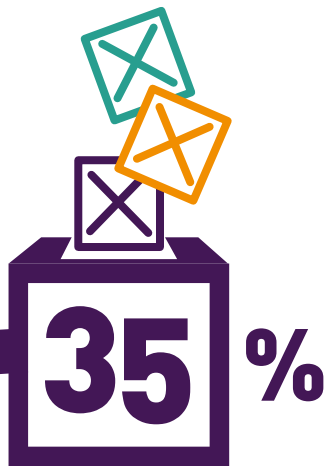
- although this percentage has **significantly dropped** from **83%** in the previous years

Parliaments are once more the

LEAST
TRUSTED

public institutions in the Western Balkans,

trusted by only



followed by **courts** → **37%**

government and **audit authority** → **38%**

& **ombudsman** → **43%**

77% of people in the Western Balkans considered **political parties** the **most** **CORRUPT**

77% **Healthcare providers**

69% **Parliament**

75% **Judiciary**



61%

of Western Balkans population
is **UNHAPPY** with their

governments' efforts
to combat **CORRUPTION**

a significant drop from last year (70%),
a **POSITIVE TREND** continued from the previous period





of Western Balkans businesses
feel it is **common** for companies
in their line of business

to have to pay some **IRREGULAR**
“additional payments/gifts”
to “get things done”

46%

of Western Balkans
business leaders believe

that reporting a

WRONGDOING

to the authorities is the **most effective** way to stop it,



but **1/4** still believe
that **wrongdoing**
cannot be stopped effectively,

a slight decrease from 28% in BB 2018



SECURITY

The word "SECURITY" is rendered in a bold, sans-serif font. The letters are colored as follows: 'S' is white, 'E' is teal, 'C' is dark blue, 'U' is yellow, 'R' is teal and contains a small gear icon, 'I' is dark blue and has three small upward-pointing triangles above it, and 'Y' is white and has a larger upward-pointing arrow above it. The background is a solid orange color.

Nearly half of Western Balkans population,

45% are **unhappy** with the **SECURITY SITUATION** in their economy

while less than a quarter,

24%

report some **degree of satisfaction** in this regard



The most striking perceptions in each of the

WESTERN  **BALKAN**

ECONOMIES

ALBANIA

Region's most supportive towards EU membership

86%

of people believe **EU membership is a GOOD thing**
– by far the **highest percentage in the region**

41% of people, **the highest percentage in the region,**
feel that WORKING HARD is **key** to success in life





Almost half, **49%**
of businesses **expect** to see an **increase** in the
number of EMPLOYEES over the next 12 months



Region's **most politically PASSIVE** population → **57%** do **not engage**
in any **discussion of government decisions** or public policy



45% of people fear falling into **POVERTY**
- a regional high and a major surge compared to the previous survey instalment (33%)

BOSNIA and HERZEGOVINA

Recording increase in number of optimistic respondents



The number of **extreme PESSIMISTS** when it comes to the **EU accession** prospects has plummeted by 10 points and currently stands at **29%**



6% of people reported **losing** their **JOB**s over the past year - fewest reported **lay-offs** in the region



8-9%

were **UNABLE TO PAY** rent or utility bills, a loan, keep home warm, afford food, clothes and basic supplies, or one week of holiday away from home over the past 12 months - **SIGNIFICANTLY less** than any of their **regional counterparts**, where percentages range from **13% to 57%**



Almost half, **48%** of **businesses** reported having **HARD-TO-FILL job** vacancies over the past year



Only a **quarter** of businesses consider their **economy** as **mostly good** or great place to **INVEST**

Traditionally, people harbour the most optimistic outlook in the region



39% of people

believe the **state** of their **economy**
will be **BETTER** in the next 12 months while

41%

are **satisfied** with the **financial situation**
of their household – the **highest percentage** in the **region**

*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

74% highlight **UNEMPLOYMENT**
as the **most problematic** issue their economy is facing,
which is **far above** the **region's average** of **60%**



80% of **businesses**
consider **quality of regional cooperation and**
EU accession IMPORTANT – the **highest percentage** in the region

Informal economy
seems to be the highest in the region as almost a **quarter of businesses report**
only up to 50% of their **REVENUES** for tax purposes

Businesses report the **HIGHEST business sentiment index** in the region **66**, on a scale from 0 to 100

MONTENEGRO

The least volatile economy in the region

Respondents are **most** likely to **TRUST** democratic oversight **institutions** to perform their role in an **effective** and **accountable** manner, ranging from **58%** support for legislature to **64%** for media



People from Montenegro are **most likely to feel WELCOME** anywhere in the region, **52%**

49% of people
expressed **DISCOMFORT** at the prospect of **working** for a **Roma** employer



Montenegro is home to the **highest** concentration
of **respondents UNCONCERNED** with **pollution**, **47%**



59% of businesses
are **likely to employ WORKERS** from **elsewhere** from the **region**

REPUBLIC OF NORTH MACEDONIA

Recorded drop in ranking across most areas surveyed

Last year's first place in **overall satisfaction** rankings swapped for this year's

last place - Public Sentiment Index **PLUMMETED** from **50** in BB2018 to **41** this year



34% of people use Internet as a tool in **EDUCATION**,
7% are **paying bills** electronically
and **4%** use government **e-services**,
making them the **region's leaders** in these areas

People are among **most troubled** in the **region**
by **CLIMATE CHANGE** and pollution with **82%** and **78%**
of the population expressing some degree of concern across both topics, respectively.



Respondents are more likely to **DISTRUST**
the judiciary - **76%** and the **media** - **68%** than in any other WB economy



STEEP DECREASE
in importance of EU membership for **businesses**
- from **65%** in BB2018 to only **46%** in BB2019





Markedly more optimistic about where their economy is heading over the coming 12 months



Serbia boasts the **highest number** of people,
39% satisfied with the **SECURITY** situation



55% of **businesses**
recognise their economy as a **good place to INVEST**,
compared to **43%** the year before

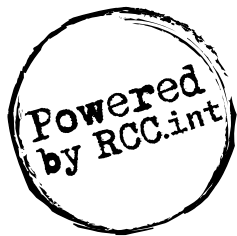
There is an **increasing level** of anxiety over **BRAIN DRAIN**,
as **21%** of people see it as their **biggest concern**



56% disagree

that the **relations** in the **REGION** are better than 12 months ago
– a **sharp negative swing** compared to **43%** in BB2018

Businesses' opinion on **importance** of **regional cooperation**
has **surged** from **46%** in BB2018
to **69%** this year, so has for **EU membership**, from **34%** in BB2018 to **65%** in BB2019





RegionalCooperationCouncil



good.better.regional.

Regional Cooperation Council Secretariat

Trg Bosne i Hercegovine 1/V,
71000 Sarajevo, Bosnia and Herzegovina
T + 387 33 561 700
F + 387 33 561 701