



Regional Cooperation Council



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BALKAN BAROMETER 2021



INFOGRAPHICS

POCKET EDITION





Balkan Barometer – annual survey of public opinion and business sentiments in six Western Balkan 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 2021 – conducted by Data Centrum among 6,000 citizens and 1,200 companies at the end of 2020 and beginning of 2021 throughout the Western Balkans



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HIGHLIGHTS

Regional cooperation enjoys wide support, as overwhelming majority of Western Balkan citizens, **77%** support its role in improving the political, economic and security situation in their home economies.

The **EU membership continues to be seen as a positive development**, with **62%** of WB citizens endorsing it (59% in BB2020 and 56% in BB2019). However, expectations for WB EU integration dissipate constantly with **only one-fourth** of respondents remaining **optimistic of EU accession by 2025**.

The vast majority of citizens, **77%** describe their **socio-economic status as average**, while the share of those 5% who claim that their standard of living is above average has not changed.

The share of WB citizens who are **seriously considering leaving their economy has declined by 6 points** (going from 43% in BB2020 to 37% in BB2021), while 53% claim to not have any intention to work abroad in the near future. **The EU remains, by a wide margin, the top destination to work for 72%** of the region's citizens.

The number of people not using Internet at all has significantly decreased, down to 11% from 26% in BB2019. Roughly 39% of people say they use internet for 2 to 3 hours daily.

Employment measures for the disabled are most supported by 92% of WB citizens, while fewer, 79% feel that special privileges should be given to members of the Roma community or other minorities (81%).

HIGHLIGHTS

The level of climate awareness remains high: three-quarters of WB citizens are concerned with climate change and pollution and 62% are willing to pay more for environmentally friendly products.

The economic impact of Covid-19 to the perceptions of WB citizens reflects in the data showing that 43% citizens are concerned about losing their or their family members' job in the next 12 months, whereas 46% report that their income has decreased. Overall, 39% of WB citizens disagree that their governments are doing enough to protect people from losing their jobs during the pandemic.

Western Balkans **companies have still used the Internet** in traditional fashion, mostly for communication (77%) and advertising on Facebook, YouTube, Google Ads (54%), searching

for innovative ideas, new trends and partners (34%). Provision of customer services or support online (24%) and executing banking and financial transactions are in third place with 44%.

Only 19% of WB businesses export to the Western Balkan region as opposed to 71% of those who do not.

Exporters to the Western Balkan region complain about the need for licences or permits (19%), to hardcopy documents or certificates (18%), unnecessary physical examinations and inspections (11%) and slow import-export procedures (13%).

The biggest concerns of Western Balkan citizens

	BB 2015	BB 2021	
Unemployment	64%	49%	15 points  than BB2015
Economic situation	58%	46%	12 points  than BB2015
Corruption	15%	26%	11 points  than BB2015
Brain drain/emigration	0%	13%	13 points  than BB2015
Crime	19%	16%	3 points  than BB2015

Unemployment and economic development remain two key problems facing the region.





74%

of Western Balkan businesses believe general economic situation looks direr than in the previous 12 months



Only
30%

of Western Balkan businesses are confident
the general economic situation will improve,
while **26%**
consider it to deteriorate
in the next 12 months.



The majority,
51%

of Western Balkan businesses think that
the region is a good place to invest

BALKAN PUBLIC SENTIMENT INDEX

remained unchanged compared to BB2020, despite the unprecedented pandemic situation, and stands at **46 points**

but future expectations had a sharp drop by 27 points



Balkan Business Sentiment Index dropped to all-time low score of 46 points after a couple of years of continued growth, & 65 points in BB2020.



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Regional Cooperation & EU Integration



77%

**Western Balkan citizen
support regional cooperation
and its role in improving
political, economic and
situation in their home
economies**

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// Regional Cooperation & EU Integration



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Quality of regional cooperation is important for

69% of Western Balkan
businesses,

whereas

66% of businesses think
that the EU membership
would be good for
their economy

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// Regional Cooperation & EU Integration



Support for EU membership
increased across the region with
62% endorsing it



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// Regional Cooperation & EU Integration

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*However, expectations
of Western Balkans
for EU integration dissipate
notably, with only one-fourth of
citizens remaining
optimistic of EU accession by 2025.
22% believe it will never happen.*

In BB2019 it was

20%

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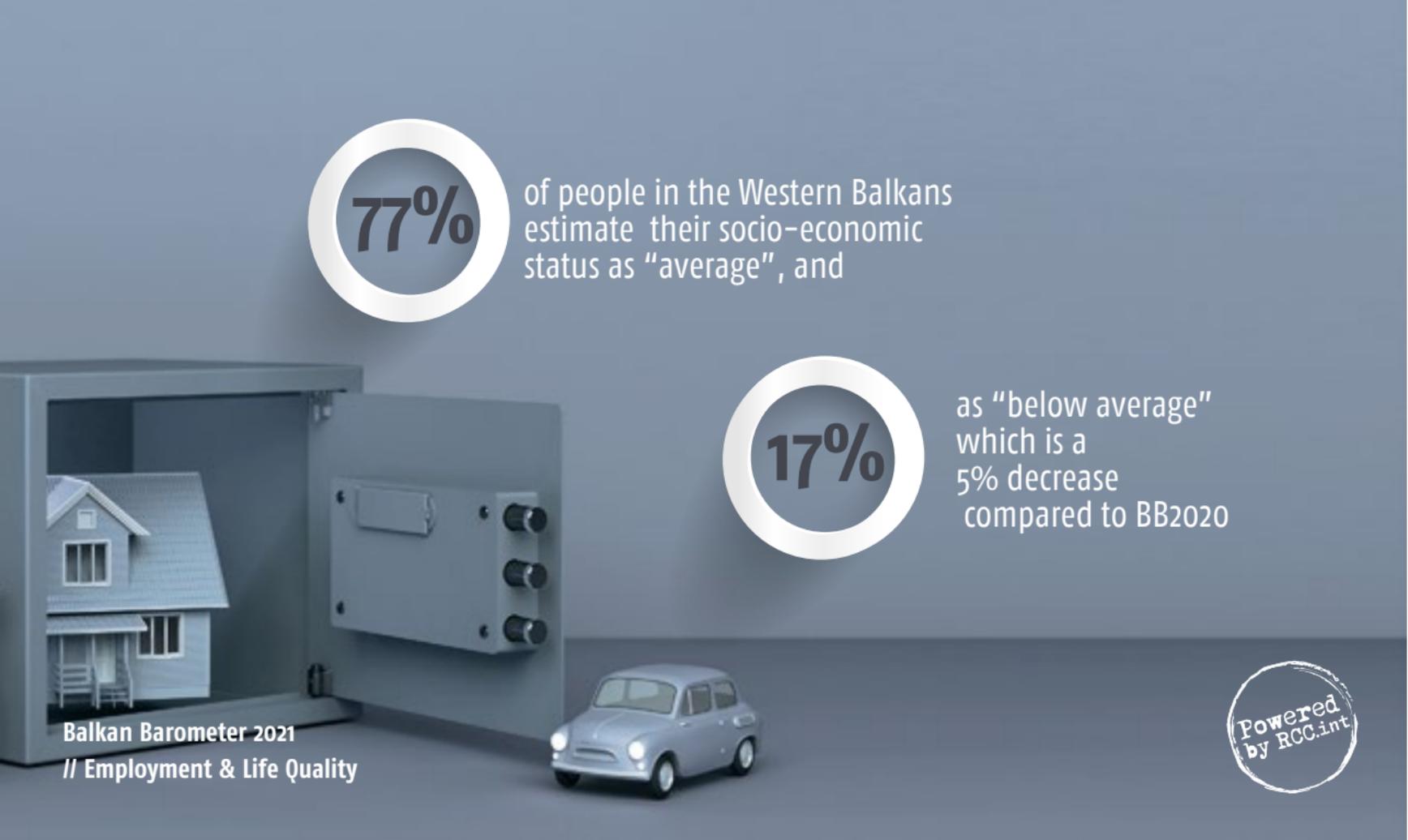
// Regional Cooperation & EU Integration

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Employment & Life Quality



77%

of people in the Western Balkans estimate their socio-economic status as "average", and

17%

as "below average" which is a 5% decrease compared to BB2020

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// Employment & Life Quality

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80%

of people in the
Western Balkans
feel that economic
inequality is on the
rise, a two-point
decrease from
BB2020

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// Employment & Life Quality



55%

of Western Balkan businesses think demand for company's products has mostly deteriorated,



while
34%

say it has grown compared to the year before



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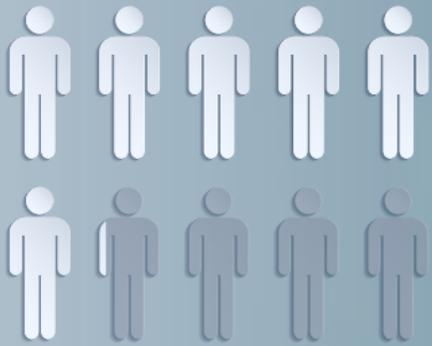


42%

of businesses are not convinced
that demand will improve
in the next 12 months

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// Employment & Life Quality





62% of Western Balkan citizens feel confident in keeping their jobs in the next 12 months

a **7%**
decrease to BB2020



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// Employment & Life Quality





of Western Balkan citizens feel there is a risk they could fall into poverty

Western Balkan citizens believe main obstacles to employment are

38%

lack of adequate jobs

28%

not knowing the
right people

18%

insufficient previous
work experience

17%

inadequate or irrelevant
education



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Employability

Having a good education and working hard
are considered critical by **58%**
of Western Balkan citizens for getting ahead in life,

for **54%** its knowing the
right people

and **38%** think being **lucky**
is most important

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• // Employability



38%

of Western Balkan citizens say level of one's qualification/education is the most important prerequisite for finding a job

- for **34%** its personal contacts – a **7% decrease to BB2020**



37%

of Western Balkan citizens would rather work in the public sector, because of job security, while **29%** prefer the private sector, because of better salary.





85%

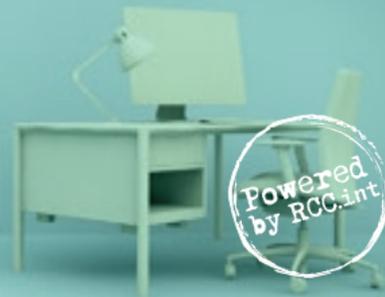
of Western Balkan citizens would gladly acquire additional qualifications to advance at work,

whereas **66%** would acquire them in order to get a job



56%

of Western Balkan businesses say their employees are interested in acquiring **additional qualifications** to advance or **get promoted**

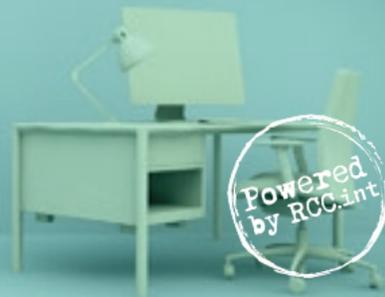




55%

of Western Balkan businesses say that skills taught throughout the education system meet the needs of their companies,

but **38%** disagree, pointing out to the mismatch between education and labour market needs.



According to Western Balkan businesses, the most effective way to increase the number of women in the labour market is





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Digital Literacy and Digital Skills



The number of people in the Western Balkans not using the Internet at all has significantly decreased, down to 11% from 26% in BB2019



Western Balkan citizens use internet mostly:





of Western Balkan citizens use E-government services

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// Digital Literacy and Digital Skills





85% of Western Balkan citizens are satisfied with their Internet connection

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// Digital Literacy and Digital Skills





of Western Balkan citizens use Facebook the most, followed by **30%** who prefer Instagram while **10%** say they do not use social media at all



For
37%

of Western Balkan citizens misusing personal data is
their biggest concern when using **online banking or shop online**

Balkan Barometer 2021
// Digital Literacy and Digital Skills



R. 
48%

of Western Balkan citizens believe **reduced roaming charges in the region helped save money on their phone costs,**

38% of businesses think they had positive impact on their business operations





53% of Western Balkan citizens consider phone costs high when travelling to the EU



39% of Western Balkan businesses have not engaged in selling and buying online during the last year,

while



27%

engage occasionally,

16%

engage monthly,

9%

quarterly and

8%

on a daily basis

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// Digital Literacy and Digital Skills



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53%

of Western Balkan
businesses switched
to online/digital
services,

whereas
47% did not

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// Digital Literacy and Digital Skills



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Out of those of Western Balkan businesses that switched to online/digital services 53% did it because of the COVID-19 induced context, 4% because it's cheaper - 43% think it's easier and faster.





of Western Balkan businesses that did not switch to online/digital services do not feel the necessity to do it, 7% are afraid to agree and share their personal data, while only 5% do not have information on which services are offered online or through digital platforms





of Western Balkan businesses take concrete measures for improving digital skills of their employees through on-the-job trainings or internal trainings





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Mobility



37%

of Western Balkan citizens would leave and work abroad
- the percentage is decreasing every year,



as in BB2015 it was 45%
and BB2020 43%.



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// Mobility





76%

of Western Balkan citizens are still not sure whether they would travel more frequently across the region with a valid ID card

- 18% of them is positive they would.



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// **Mobility**





61%

of Western Balkan businesses **think that travelling with only a valid ID card would benefit their business**



Balkan Barometer 2021

// Mobility



Sentiment on people from other parts of the region coming to live and work in respondent's economy – overview 2016–2020 (All respondents, share of total, %)

	BB2017	BB2018	BB2019	BB2020	BB2021
😊	28	31	36	40	42
😐	23	19	19	15	10
☹️	43	45	38	39	42





of Western Balkan citizens who claim they would leave and work abroad are finalising necessary administrative issues (2% decrease from BB2020)



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// Mobility





66% of Western Balkan citizens did not travel anywhere in the region in the past 12 months – mostly to visits family & friends (64%)



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// Mobility





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Social Inclusion and Vulnerable Groups

92%

of Western Balkan citizens support affirmative action in employment for people with disabilities,

79%

for Roma community and

78%

for displaced persons or refugees



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// Social Inclusion and Vulnerable Groups

25% of Western Balkan citizens feel comfortable with renting a house to Roma,

37% with having friends who are Roma,

37% with sending their children to school with Roma,

32% with working for Roma employer &

38% with working with Roma



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65%

of Western Balkan businesses do not have members from vulnerable groups employed in their companies

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// Social Inclusion and Vulnerable Groups



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7% of Western Balkan businesses employ persons with disabilities,

11% displaced persons or refugees

12% Roma &

13% other ethnic minorities





of Western Balkan businesses deem that employing Roma persons would have a negative impact on company's sales or working environment



30%



of Western
Balkan businesses
would rather hire
men,

8%

would rather
hire women,

and 56%

have no
preferences



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69%

of Western Balkan
citizens have
no preferences in
having a female or
male boss at work



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// Social Inclusion and Vulnerable Groups

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57%



of Western Balkan citizens think that equalising the salary and pay for women and men doing the same jobs could improve gender equality at work



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of Western Balkan citizens think that equalising the number of female and male staff could improve gender equality at work





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Trade

58%

of Western Balkan citizens
believe commercial and trade
links **within the region**
should be improved



83%

of people in the
Western Balkan
believe products
from their economies
can measure up to
competitors in the
region,

while

74%

feel the same about
products from the EU



For **72%** of Western Balkan citizens EU remains a preferred first trade, Turkey follows with **36%**, Russia with **35%** and China is fourth with **34%**, while **18%** would like to see trade enhanced with Middle Eastern and Gulf countries

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// Trade

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If individuals in the Western Balkans could choose a food or beverage product, 78% would choose domestic products as their first choice and 41% would choose products from Western Balkan economies as their second choice



7% of Western Balkan businesses have
exported to the Western Balkans and

6% to the EU

86% did business domestically



51%

of business leaders **believe Western Balkans is a good place to invest,**

while
19%

disagree

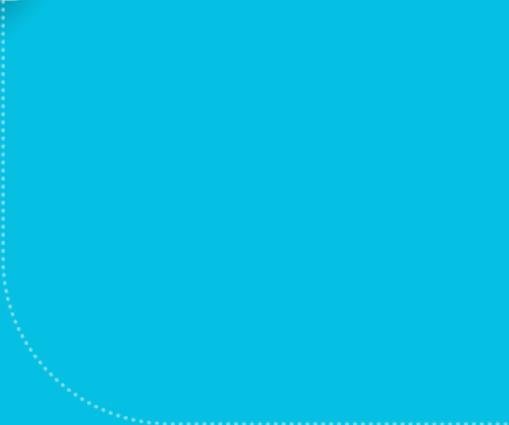
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// Trade





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A white dotted line starts from the bottom of the orange circle, curves downwards and to the right, and then continues horizontally to the left of the title text.

Transport and Infrastructure



64%

of WB citizens are
happy with the
quality of transport
infrastructure in their
economies

increase by **4%**
since BB2020



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// Transport and Infrastructure

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57%

of WB citizens consider road travel in their economies to be safe



while
40%

disagree



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// Transport and Infrastructure

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This is how Western Balkan exporters and non-exporters grade

When asked to grade availability, quality and affordability of road, railroad, waterway and air transport in the region, WB (non)exporters state the following:



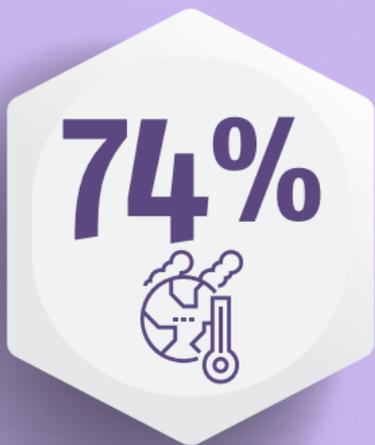
	WB exporters	WB non-exporters
Excellent	2%	2%
Very good	23%	24%
Neither good nor bad	49%	51%
Poor	18%	16%





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Climate Change and Energy



of Western Balkan citizens perceive climate change as a threat





of Western Balkan citizens see pollution as a serious problem in their economies





of Western Balkan citizens say they try to cut down on consumption of disposal items whenever possible, such as plastic bags from supermarkets.



62% of Western Balkan citizens say they are willing to pay more for environmentally friendly products



18%



of Western Balkan citizens say they use environmentally friendly alternatives of transport, e.g. walking, biking, public transport or car-sharing

8%
more than in **BB2020!**





59%

of Western Balkan businesses say
they have taken environmental
mitigation measures



-significantly less than

73% in BB2020



When asked what about the priorities of the Green Agenda for the Western Balkans, region's businesses say:

41%

reducing energy consumption

36%

reducing waste generation

55%

pollution reduction

31%

smart and sustainable transport

26%

getting rid of coal

35%

protection of nature and biodiversity

30%

sustainable agriculture

19%

climate policy and action

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// Climate Change and Energy





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**Public Administration and Services
(independence, freedom, corruption)**



Small increase in SATISFACTION with government services

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

	BB 2015	BB 2021
Treatment of citizens in public sector	2.3	2.7
Time required for obtaining public services	2.4	2.6
Time required for getting information in public sector	2.4	2.6
Price of public services	2.2	2.2

(scores from 1 to 5)

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// Public Administration and Services



27%

of people in Western
Balkans get their
personal documents
online



10%
more than in **BB2020!**

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// Public Administration and Services





54% of Western Balkan citizens are satisfied with the efficiency of administrative procedures in the public sector



of Western Balkan citizens feel that laws
are not applied effectively
(8 point decrease from the previous year)



Balkan Barometer 2021

// Public Administration and Services





of Western Balkan citizens feel that laws
are not applied effectively

Balkan Barometer 2021

// Public Administration and Services





Parliaments and courts

are the least trusted public institutions in the Western Balkans
– **61%** of Western Balkan citizens distrust these institutions

Governments are distrusted by **57%** of citizens

Audit institutions distrusted by **50%**

Ombudsman distrusted by **46%**

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// Public Administration and Services



Asked about which is the most corrupt,
Western Balkan citizens say:

78%

Political parties

76%

Judiciary

75%

Customs

74%

Healthcare
providers

71%

Parliament

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// Public Administration and Services



59%

of Western Balkans population
is unhappy with their
governments' efforts to
combat corruption,

a significant decrease from last year
(71%)

Balkan Barometer 2021

// Public Administration and Services





18%



of Western Balkan 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"**



Balkan Barometer 2021

// Public Administration and Services





of Western Balkan business leaders believe digitalisation of public services would have a positive impact on preventing corruptive practices,

- ranging from those that believe digitalisation to have a great impact **(34%)**
- to marginal impact **(48%)**



61%



of Western Balkan businesses agree that the International community should prioritise addressing issues of corruption to improve business climate of their Economies.



Balkan Barometer 2021

// Public Administration and Services





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Security



Only

24%

of Western Balkans population is satisfied with the way their economy tackles security challenges

as opposed to

39%

of them who are mostly or completely unsatisfied.

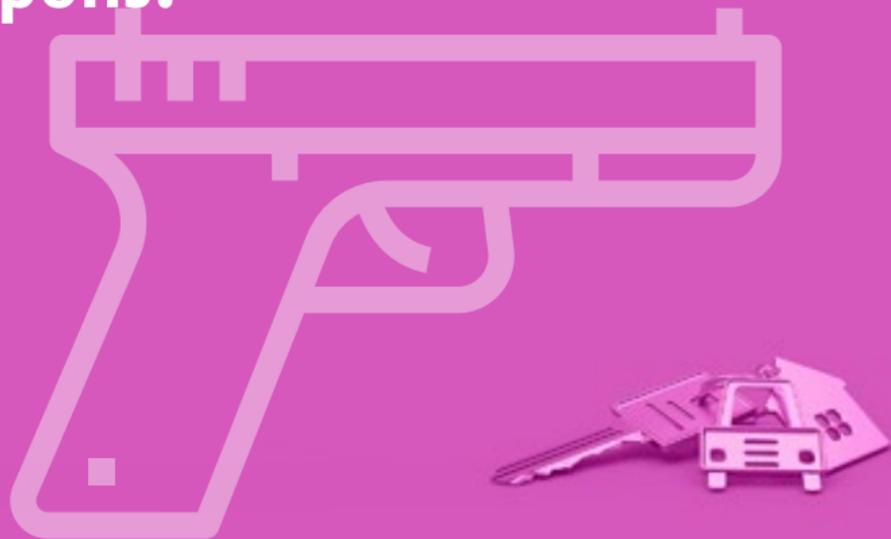
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// Security



50%

of citizens feel threatened by the illegal possession and misuse of **weapons.**



When asked which factors contribute most to radicalisation and violent extremism in their economy today,

64%

of Western Balkan citizens listed unemployment/financial security,

44%

pointed to the weakness of state and social security institutions,

42%

to propaganda/fake news and

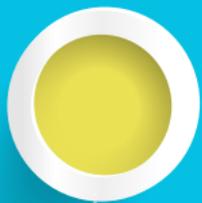
32%

social media

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// Public Administration and Services





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**COVID-19 impact on citizens'
perceptions and business operations**

An overwhelming majority of Western Balkan citizens,

73%

think that the coronavirus poses **high threat** to the global economy and

and

74%

to their national economy

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// COVID-19 impact on citizens' perceptions and business operations



41%

of Western Balkan citizens think coronavirus poses high threat to their job or jobs of their family members,

and
43%

is concerned about losing their jobs in the next 12 months

Balkan Barometer 2021

// COVID-19 impact on citizens' perceptions and business operations



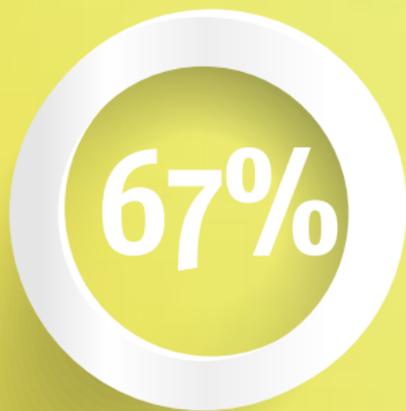


of Western Balkan citizens think that their government is doing enough to protect people from losing their job in the midst of the pandemic

Balkan Barometer 2021

// COVID-19 impact on citizens' perceptions and business operations





of Western Balkan citizens are concerned with the circulation of disinformation in the context of COVID-19

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// COVID-19 impact on citizens' perceptions and business operations



43%

of Western Balkan citizens say that during the pandemic it was the **EU** that supported their economy the most.

China is second with **14%**, Turkey with **9%** and other **WB economies** and **Russia** share the fourth place with **7%** of citizens thinking they were the most helpful.

Balkan Barometer 2021

// COVID-19 impact on citizens' perceptions and business operations





56%

of Western Balkan citizens are willing to take the vaccine,

whereas
42%

of them are not

Balkan Barometer 2021

// COVID-19 impact on citizens' perceptions and business operations



The **main reasons** for
not wanting to take the vaccine include

the concerns
about the side effects **57%**

effectiveness of the vaccine **19%**

being against
vaccines in general **13%**

not being enough at
risk from COVID-19 **8%**

and cost of the
vaccine **1%**

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// COVID-19 impact on citizens' perceptions and business operations



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59%

of Western Balkan businesses say they were forced to downscale and reduce their operations in the midst of the pandemic

16%

temporarily paused or closed their operations, and

1%

permanently ceased their operations

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// COVID-19 impact on citizens' perceptions and business operations

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62%

of Western Balkan businesses say their **access to financial resources** decreased due to the pandemic outbreak

Balkan Barometer 2021

// COVID-19 impact on citizens' perceptions and business operations



Western Balkans employment figures during the pandemic:

- 60% of businesses say the number of employees remained the same
- 33% decreased employees
- 5% of businesses hired more people



The biggest problems for Western Balkans businesses during the pandemic:

- 45% finances
- 35% containment measures
- 31% access to domestic customers
- 29% supply chain problems
- 20% staff availability

Balkan Barometer 2021

// COVID-19 impact on citizens' perceptions and business operations



The three biggest concerns for Western Balkan businesses at this moment are loss of income (30%) and reduced productivity (20%), with possible cessation of operations closely following with 19%

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// COVID-19 impact on citizens' perceptions and business operations



Western Balkan businesses say these would be the most helpful government measures to assist them overcome the crisis:



tax deferral



direct subsidies



temporary reduction of employers' social security contributions and individual contributions



31%

of Western Balkan businesses think that it will take 2 years for the post pandemic recovery, whereas another

31%

hold it will happen by the end of 2021

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// COVID-19 impact on citizens' perceptions and business operations

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**Overview of key sentiments per each
Western Balkan economy**

ALBANIA

Region's most progressive economy in digitalisation and e-government service quality

- 1** 84% of people believe **EU membership is a good thing** and 85% think that their government should further improve trade and investment relations with the European Union – by far the **highest percentage in the region**.
- 2** 49% of people have **positive sentiments** towards citizens from **other economies** in the region coming to work in Albania.
- 3** 34% of respondents in Albania think that **reducing CO2 emissions** and bringing them to the level close to zero which will allow achieving climate-neutrality in the WB by 2050 **is a necessity**.
- 4** 56% of people **use e-government services** to get their personal documents online, such as birth certificate, citizenship, etc. Also, 61% reported **switching to online/digital services** during the Covid-19 pandemic – a regional high in this area.
- 5** Apart from Coronavirus (62%), more than **two-thirds (69%)** find **unemployment the most worrying issue in Albania**, and **38% healthcare**, all three issues being highest compared to regional average.

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// Overview of key sentiments per each Western Balkan economy



BOSNIA AND HERZEGOVINA

Mixed messages of cautious business optimism and low public trust towards government

- 1** Companies from Bosnia and Herzegovina **lead the region in investment** and trade openness, with **21% of companies investing abroad**, **27% of firms exporting** with **33%** of revenues generated through **sales on export markets**.
- 2** Cautious business optimism is detected, despite the COVID-19 pandemic restrictions, as **15% of companies** noted an **improvement** of the business situation in the economy, a regional high.
- 3** **53%** of citizens assess the quality of their **transport infrastructure as poor** and **57%** think road travel as **unsafe** – highest in the region.
- 4** **40%** of citizens **disagree** that the **government's economic and fiscal measures will have a positive impact on the economy**, while only **12%** agree, the only economy with this ratio in the region.
- 5** More than **two-thirds** of citizens in Bosnia and Herzegovina are **unsatisfied with the security situation** (63%).

Balkan Barometer 2021

// Overview of key sentiments per each Western Balkan economy



- 1** Post-Covid-19, **71%** of respondents **want their economy to prioritise economic growth**, while **76%** support **stronger commercial and trade links with the Western Balkan region**, highest percentage values in the region
- 2** **67%** of companies consider Kosovo* **a good place to invest**, with **74%** of **executives** reporting an **improved business situation over the past year** – both significantly higher than the regional average.
- 3** While **happy with the quality of transport infrastructure (77%)** assess transport infrastructure as good, very good or excellent), Kosovo* respondents **prioritise investment in social infrastructure (54%)**.
- 4** **86%** of respondents consider **pollution** to be a **problem** in their economy
- 5** Informal economy seems to be the highest in the region as, on average, only **66% of revenues are reported for tax purposes**.



MONTENEGRO

Despite the difficult year behind, economy remains committed to regional cooperation and environmental protection



- 1** People from Montenegro are most likely to **feel welcome** anywhere in the region (**62%**).
- 2** **78%** agree on the **importance of the quality of regional cooperation** in the Western Balkans for their business.
- 3** Businesses in Montenegro are most likely to **reduce the environmental impact** they make (**77%**), such as by reducing energy consumption, waste reduction or switching to recycled/sustainable materials. **71%** of respondents agreed that they were ready to buy **environmentally friendly products**, even if they cost a little bit more. Highest ratio in the region.
- 4** A bigger proportion of respondents are considering **leaving the economy** and working abroad (**45%**) than those that are not (**42%**).
- 5** The COVID-19 pandemic seems to have significantly affected individuals in Montenegro and its economy, pointing out to the highest percentage values in the region: **50%** of the respondents admitted that during the past year their household was **not able to afford at least one week of holiday** from home, **23%** were not able to pay instalment on a loan, **22%** were **unable to pay rent** or utility bills, **16%** were unable to **keep their homes adequately warm** and **15%** were **unable to afford food, clothes and other basic supplies**.

Balkan Barometer 2021

// Overview of key sentiments per each Western Balkan economy



NORTH MACEDONIA

Least likely to consider leaving
and working abroad

- 1** Respondents **prioritised industrial development (47%), energy sector (29%), green industries (19%) and digital infrastructure (16%)** as areas in which their government should invest its resources. Highest regional percentage values.
- 2** People in North Macedonia list the **network of family and friends in high places (40%)** and **ethnic affiliation (10%)** as assets that are most **important for finding a job today** – highest regional ration.
- 3** Respondents are more likely to **distrust the judiciary - 70%** - more than in any other WB economy
- 4** Only **27%** of respondents from North Macedonia would consider **leaving and working abroad**. The lowest in the region.
- 5** The overwhelming majority of people in North Macedonia (**82%**) **view climate change as a problem**. The highest percentage in the Western Balkans.

Balkan Barometer 2021

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SERBIA

Highest public sentiment in the region and high level of trust towards national institutions

- 1** Serbia has recorded the **highest Balkan Public Sentiment Index** of 54
- 2** Serbia boasts the highest number of people (**47%**) **satisfied with the security situation**
- 3** **Higher trust in the rule of law** than in the rest of the region, with close to half of respondents feeling that the law is applied effectively (52%), and equally to all (38%)
- 4** However, **84%** of people surveyed in Serbia think that the **gap between the rich and the poor is increasing** – a regional high when it comes to perceived rise in inequality
- 5** Serbian respondents prefer **strengthening trade** and investment ties with **Russia (58%)** and **China (47%)** more than any other economy in the region

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