

**PUBLIC OPINION
SURVEY**



**BUSINESS OPINION
SURVEY**



REGIONAL COOPERATION COUNCIL PRESENTS:
Balkan Barometer 2018

BRUSSELS, 6th JULY 2018.

Balkan Barometer 2018

PUBLIC OPINION SURVEY
BUSINESS OPINION SURVEY

[10]
YEARS
Powered
by RCC.

Vladimir Gligorov

July 2018, Presentation of the results



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Introduction

RESEARCH AIM:

The main objective of the assignment is to design, with RCC's input, and execute a public opinion and business sentiment survey and produce the fourth Balkan Barometer report.

The Balkan Barometer report is envisioned to become an integral part of the SEE 2020 monitoring system.

TARGET GROUPS - SAMPLES:



Balkan Barometer Public Opinion Survey: n=6000 (1000 per each economy: Albania, Bosnia and Herzegovina, Kosovo*, The Former Yugoslav Republic of Macedonia, Montenegro, and Serbia; 18+, nationally representative, two-stage stratified).



Balkan Barometer Business Opinion Survey: n=1200 (200 per each economy: Albania, Bosnia and Herzegovina, Kosovo*, The Former Yugoslav Republic of Macedonia, Montenegro, and Serbia; nationally representative for companies that are not state owned (in business more than two years and employ more than 3 employees); respondent: member of company management team.

TIMING:

November - December 2017

**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.*



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NOTE: For the purposes of this year's report, South East Europe is used interchangeably with the term Western Balkans, and denotes Albania, Bosnia and Herzegovina, Kosovo, Montenegro, Serbia and The Former Yugoslav Republic of Macedonia. Croatia, originally part of the group of economies that developed the SEE 2020 framework has since joined the EU and no longer participates in the SEE 2020 monitoring process. In line with that, Balkan Barometer 2018 was not conducted in Croatia, and all existing comparisons at the regional level were made based on recalculated results not including those obtained in this economy over the previous three waves.*

Summary

- The public is still rather depressed, while the business expects better times
- The young, the better educated, and those working for larger or foreign firms are more optimistic
- Serbia and Bosnia and Herzegovina are rather more pessimistic
- Within Bosnia and Herzegovina, Republika Srpska is more pessimistic than the Federation of Bosnia and Herzegovina
- Democratisation supported in the Former Yugoslav Republic of Macedonia, improved government efficiency seen in Montenegro
- EU enthusiasm higher and in particular in Kosovo* and Albania, though still rather low in Serbia and Republika Srpska

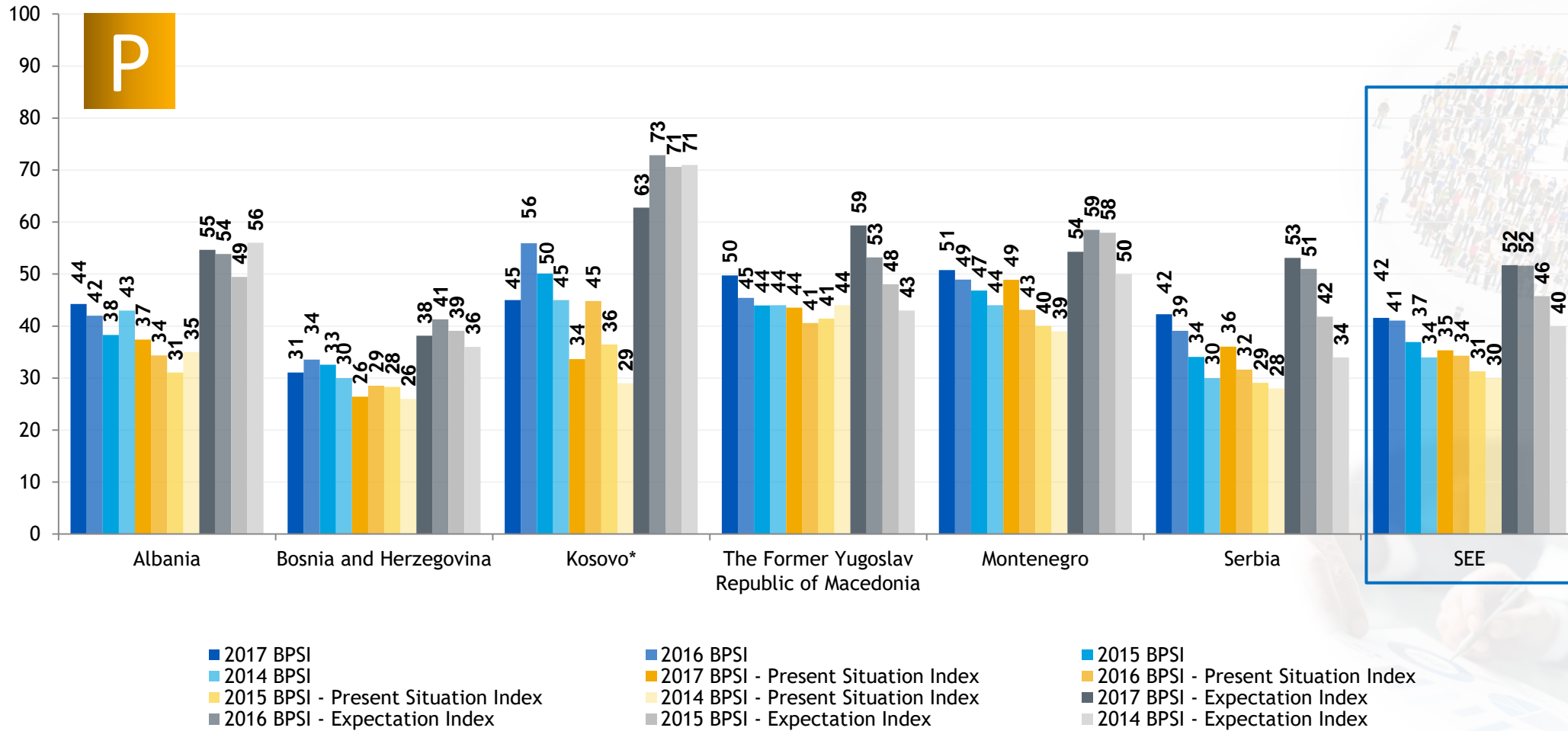


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BPSI through a four-year period

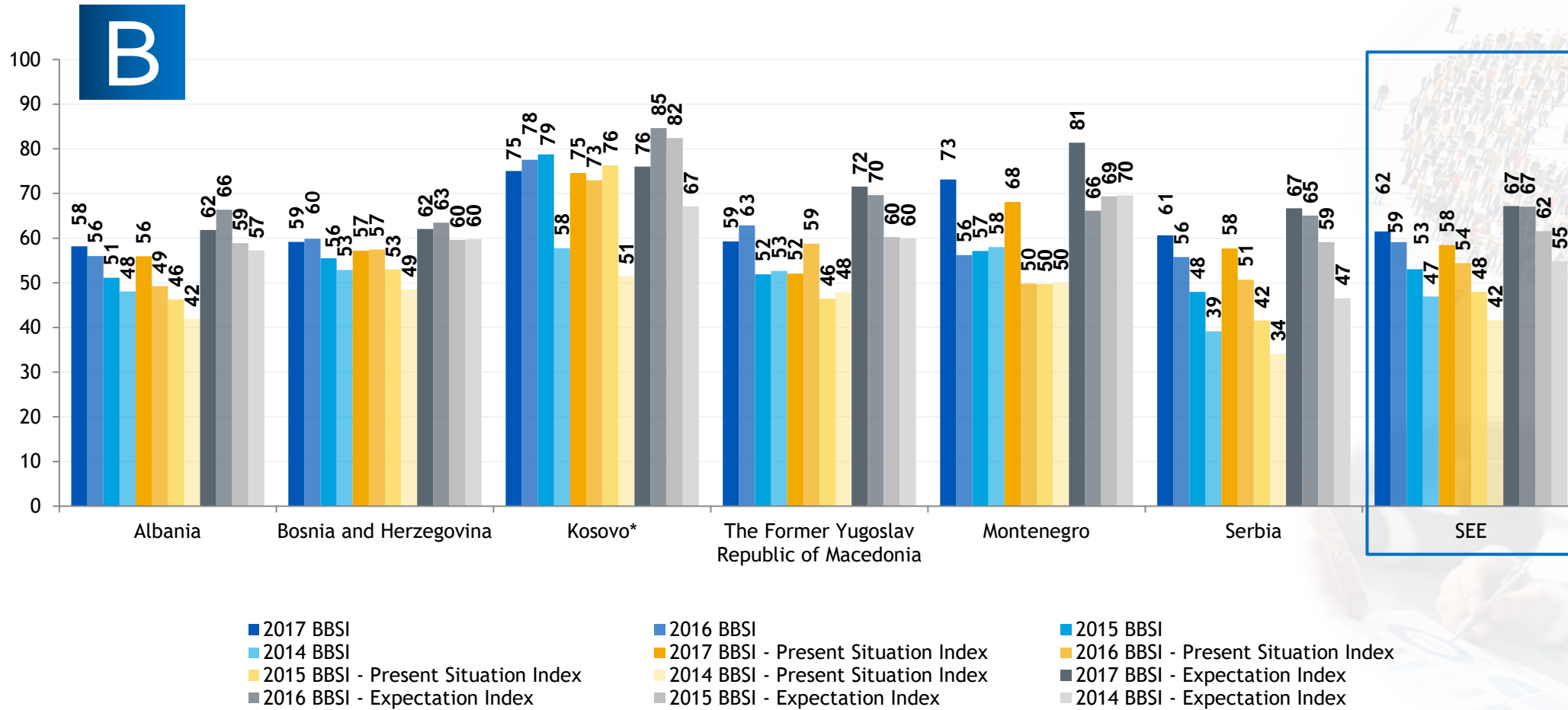


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BBSI through a four-year period



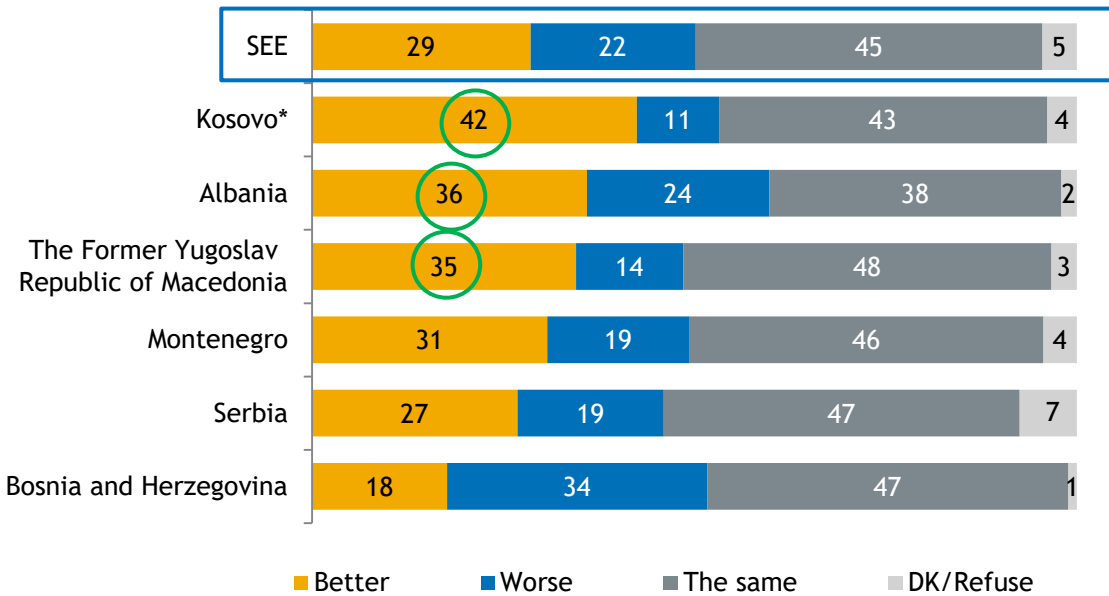
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Expectations puzzle

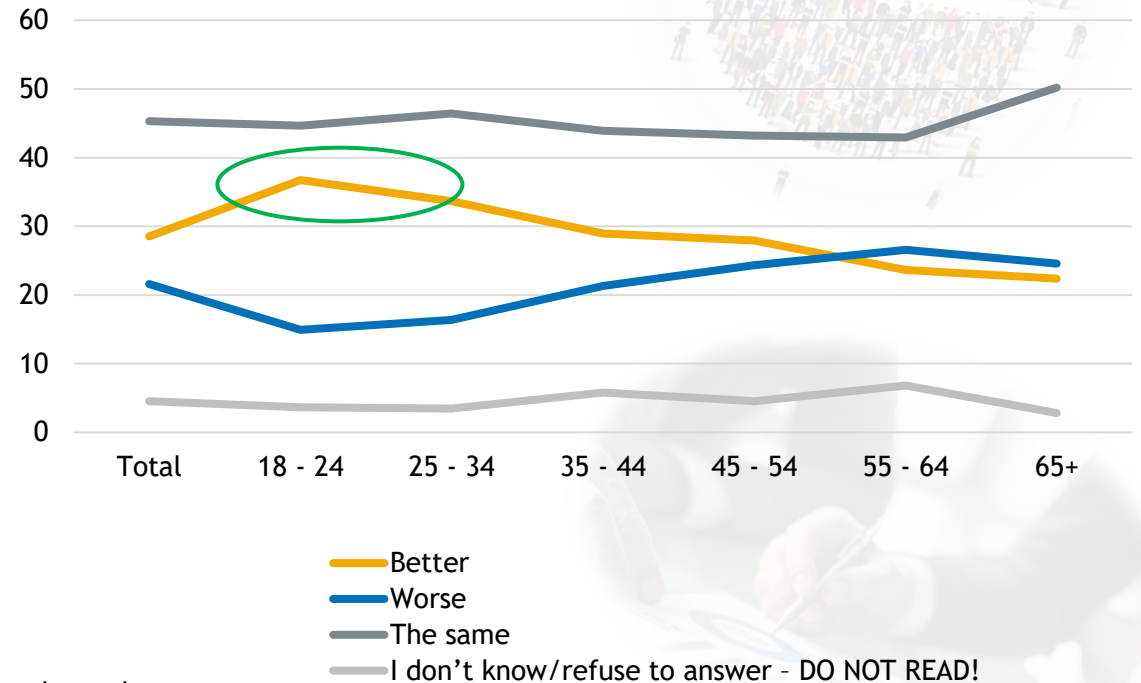
PUBLIC OPINION SURVEY

Expectations by economy



 Significantly higher than others

Expectations by age



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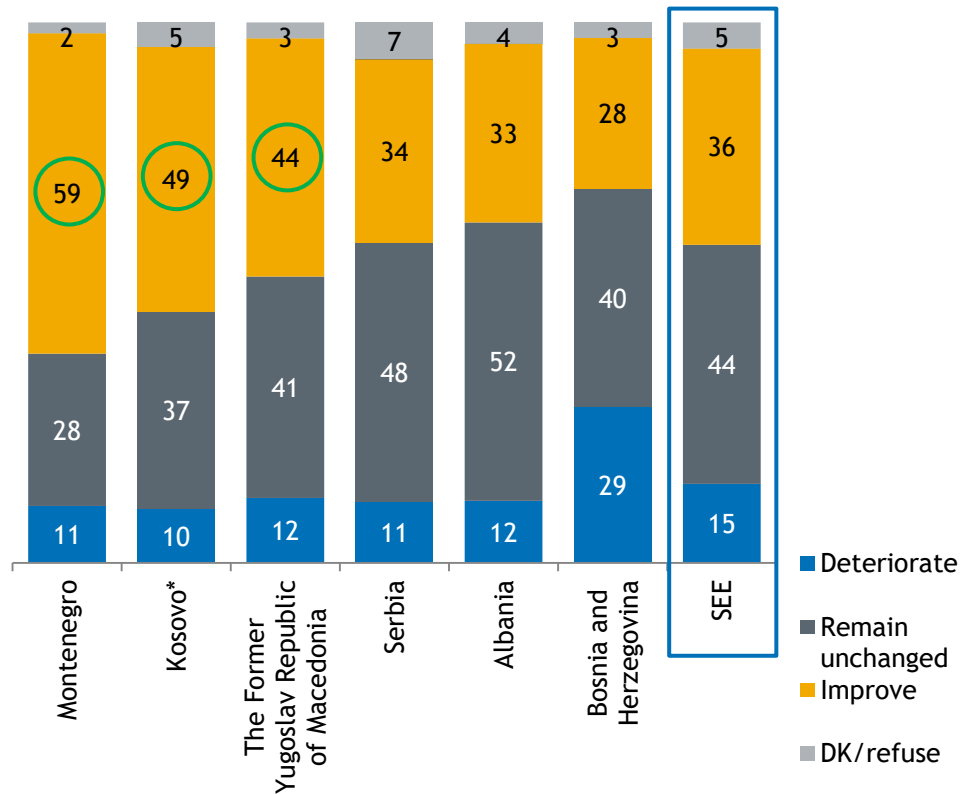
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Expectations puzzle

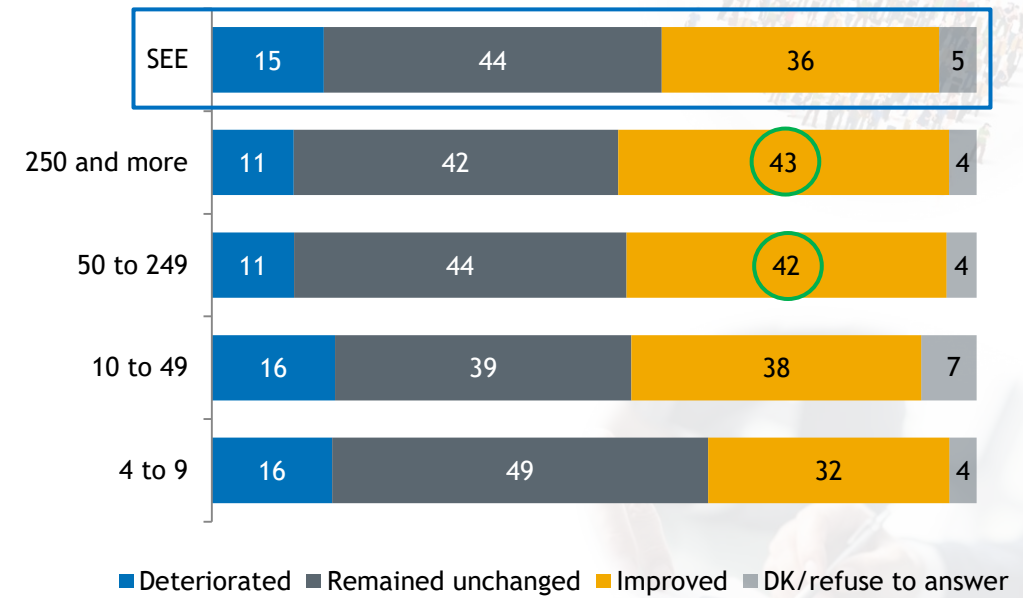
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BUSINESS OPINION SURVEY

Expectations by economy



Expectations by No. of employees



Significantly higher than others



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Expectations puzzle

B

BUSINESS OPINION SURVEY

EXPECTATIONS	Deteriorated	Remained unchanged	Improved	DK/refuse
Exporters	16	40	38	6
Non-exporters	14	46	35	4
Majority domestic	15	45	35	5
Majority foreign	17	21	56	6
Innovative	15	39	39	7
Non-innovative	15	47	34	4

 Significantly higher than others



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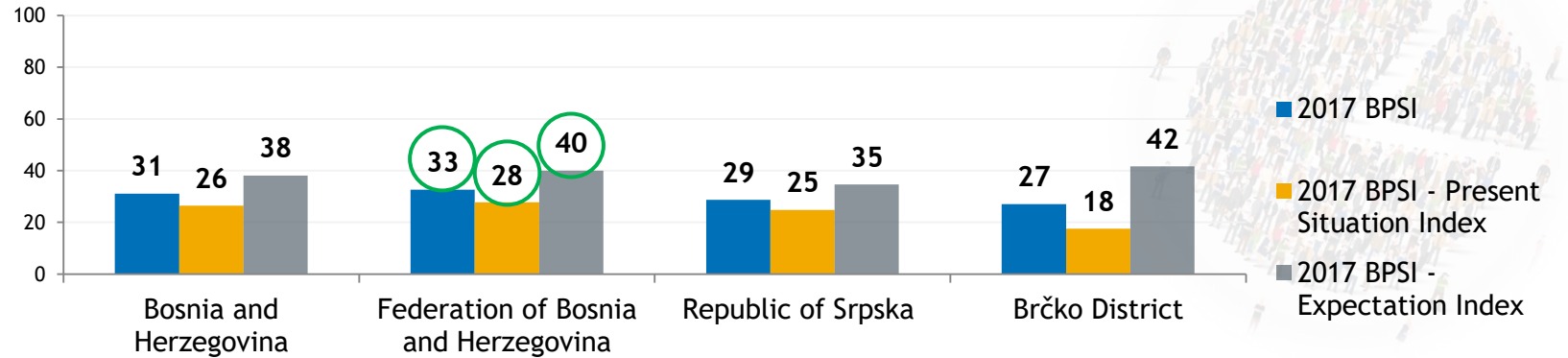
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Bosnia and Herzegovina

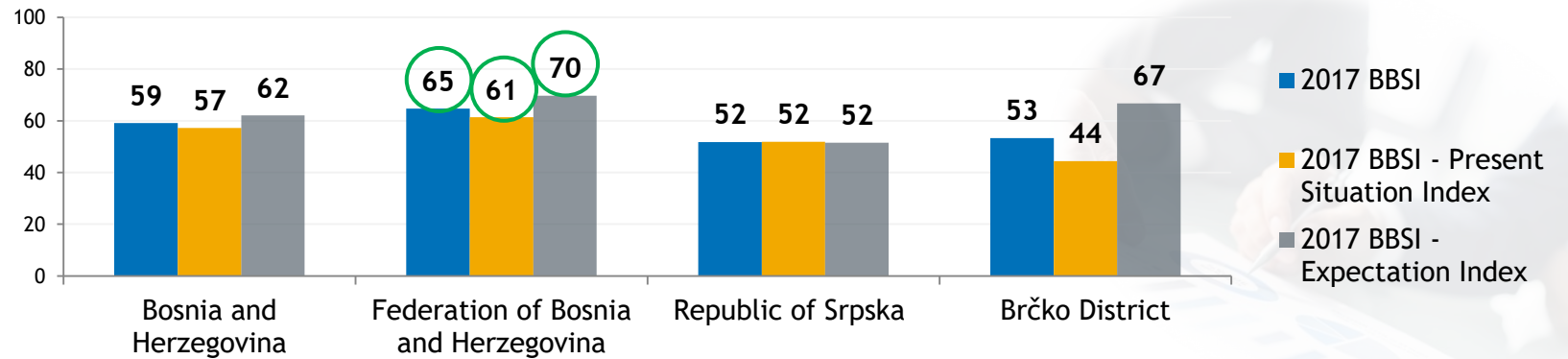
Entity comparison



BALKAN PUBLIC SENTIMENT INDEX



BALKAN BUSINESS SENTIMENT INDEX



Significantly higher than others



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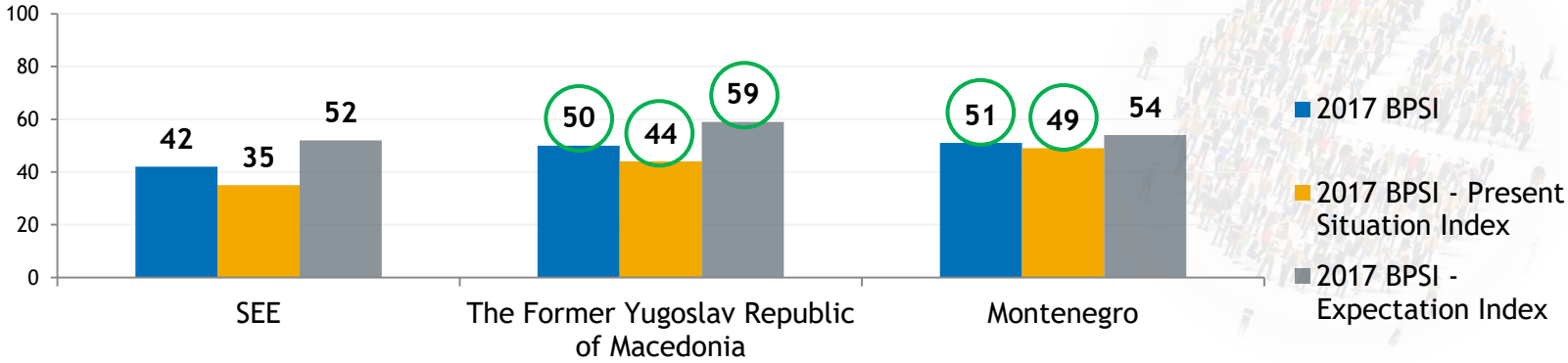


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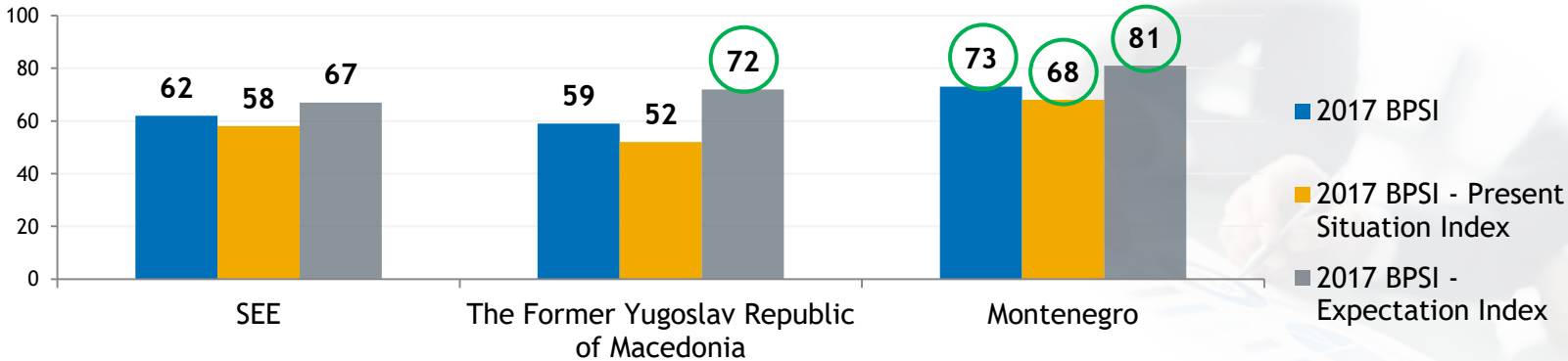
Montenegro vs. The Former Yugoslav Republic of Macedonia



BALKAN PUBLIC SENTIMENT INDEX

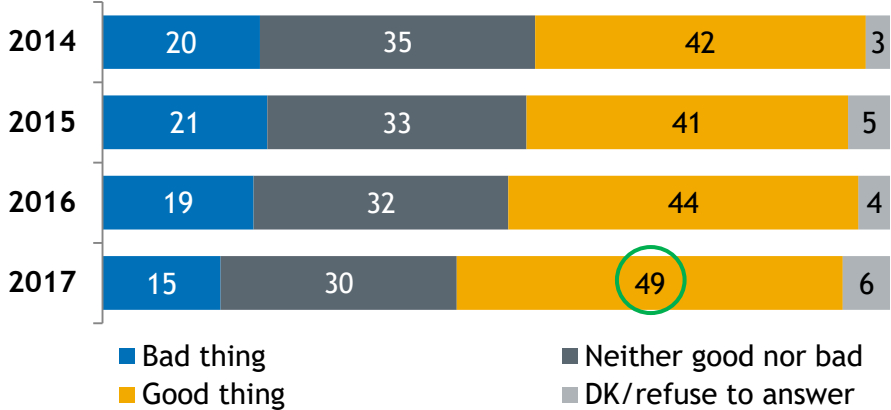


BALKAN BUSINESS SENTIMENT INDEX

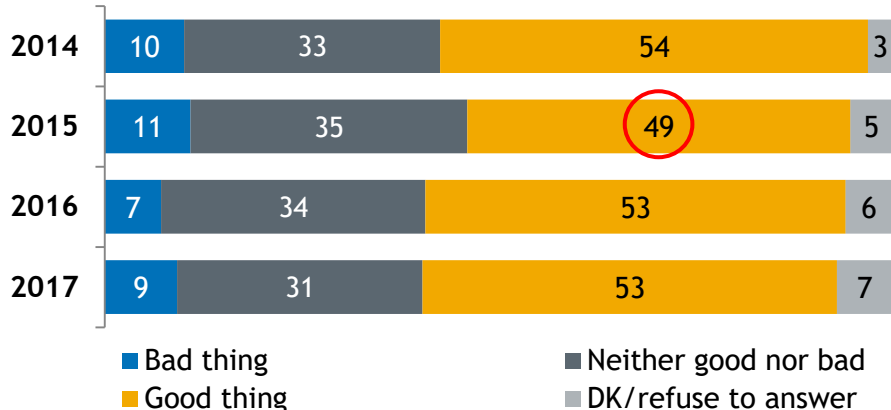


SEE towards EU

P PUBLIC OPINION SURVEY



B BUSINESS OPINION SURVEY

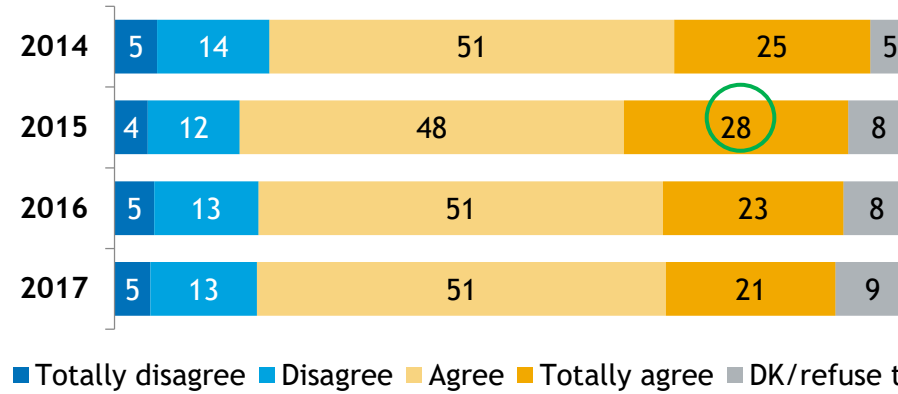


 Significantly higher than average
 Significantly lower than average

Regional relations

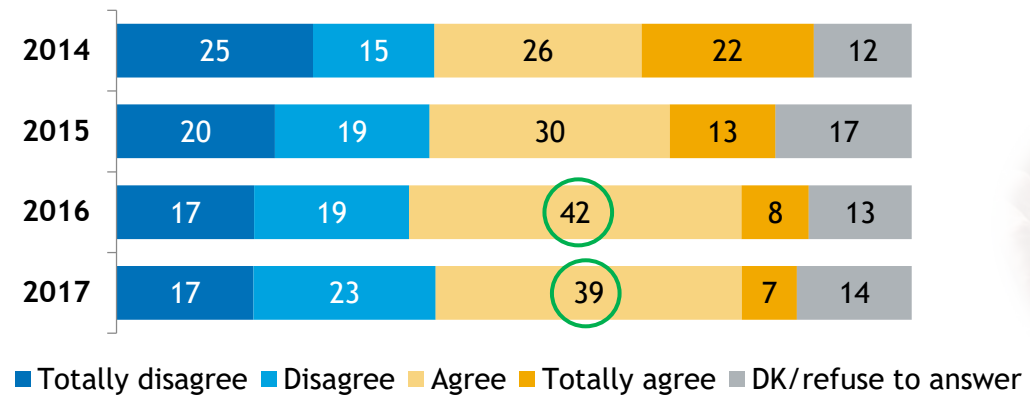
P

BENEFITS FROM REGIONAL COOPERATION



B

BENEFITS FROM CEFTA



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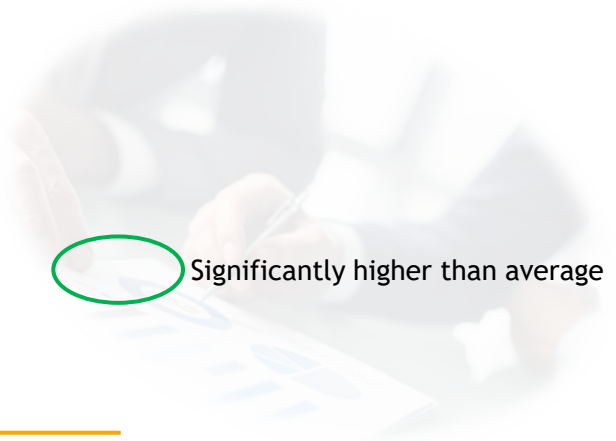
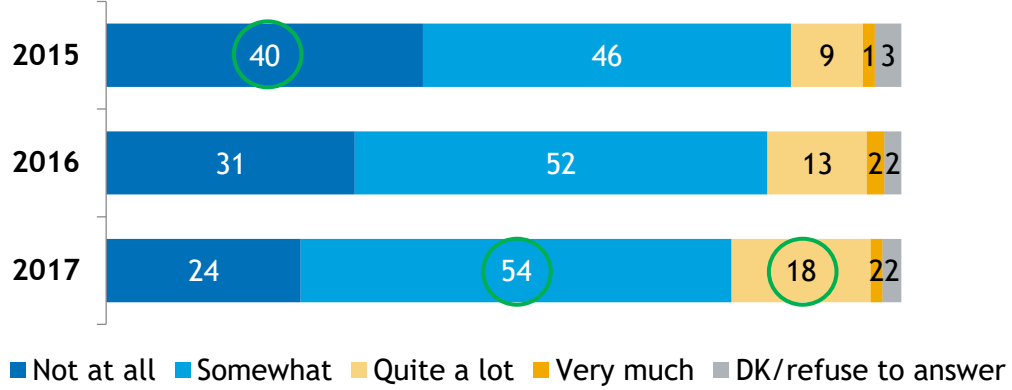
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Significantly higher than average

Government's commitment to businesses

B BUSINESS OPINION SURVEY



Significantly higher than average



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Going forward

- Business interest in more open economies might over time influence the policy agenda
- The public is moving more slowly, which suggests the need for political leadership
- Democratisation is one way to go to solving long-term problems
- EU anchor may at last start to hold, among the business people more than in the public, assuming it will continue to be there



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THANK YOU FOR THE ATTENTION!