BALKAN BAROMETER 2021

PUBLIC OPINION

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Analytical report

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better.
regional.

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Public Opinion
Analytical report

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Trg Bosne i Hercegovine 1/V, 71000 Sarajevo
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Tel: +387 33 561 700; Fax: +387 33 561 701

E-mail: rcc@rcc.int

Website: www.rcc.int

Authors: ACIT and EPIK Institute

Editor: Bojana Zoric, Senior Policy Analyst, RCC

Design & Layout: Samir Dedić

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BALKAN BAROMETER 2021

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ANALYTICAL REPORT

Contents

List of tables

List of figures

FOREWORD

The Regional Cooperation Council presents the 2021 edition of the Balkan Barometer - the annual survey of Western Balkans citizens and business perceptions. The analysis of the results provides a detailed insight into trends and evolution of the attitudes of thousands of region's citizens and businesses across socio-economic topics that impact their everyday lives. Due to this long-running exercise, monitoring the public sentiment has once again proved to be of great importance to understand citizens' and businesses' attitudes towards current situation as well as the expectations for the region's recovery in the wake of the pandemic.

This is the second Barometer edition that reflects the new reality created by the pandemic and the measures taken to contain it. As such, findings of these last two editions are particularly significant in offering a clear understanding of what the crisis created by the COVID-19 pandemic means on the ground, what its consequences are, and what are the citizens' future prospects.

This biggest public health crisis that the region and the whole world have been facing for over a year, made us aware, more than ever, that our health and economic prosperity depend on our neighbours' solidarity and cooperation. This year's findings reconfirmed that Western Balkans is a vibrant region, eager to make full use of its potential to boost the economic recovery, through accelerated regional economic integration and deepened economic cooperation with the EU.

Results of all seven cycles of the Barometer show **ongoing incremental improvements in sentiments in the Western Balkans region related to regional cooperation**. An underlying sentiment of solidarity pervades the Western Balkans, with close to two-thirds focusing on what brings the region together rather than what drives it apart. Likewise, an overwhelming majority of respondents support regional cooperation role in improving the political, economic and security situation in their home economies (77%). The fact that over three-fourth of participants observe improvement shows an unprecedented positive change. After last year's negative appraisal, this rejuvenated positive view is encouraging.

The EU accession continues to be seen as a positive development. Steady support for regional cooperation and EU accession amplifies the importance and one of the long-term goals of such processes–to make us more cooperative, solidary and resilient against crisis such as the COVID-19 outbreak. **Results show a subtle increase in support for EU membership across the region, with 62% endorsing accession (59% in 2019 and 56% in 2018)**. However, every year the expectations in the Western Balkans for EU integration show a more realistic outlook on the region's foreseeable accession prospects.

After several years of relative stagnation in perceived socio-economic status, and despite the pandemic heavily impacting our economy, **improvements in the overall economic situation seem to be translating into tangible benefits across the region**. The vast majority of residents in the Western Balkans describing their socio-economic status as average (77%), slightly increased since 2019, while the share of those who claim that their standard of living is above average (5%) has not changed. Interestingly, this perception seemingly diverges from the finding that the number of below-average respondents is decreasing, with the rank of the so-called middle class swelling accordingly.

While unemployment continues to remain a challenge across the region, particularly among youth and women, there is a growing number of participants who think that education and hard work are the main preconditions for getting ahead in life and finding a job. Some 58% feel that having a good education and working hard are equally important contributors for a better future, while 38% find job qualifications and education as the most important asset to find a job. 54% claim that knowing the right people is important for a bright future, while more than one-third believe that luck will get you ahead in life.

The decline by 6 points of the share of respondents who are seriously considering leaving their economy (one-third) **is encouraging**, while over half claim do not have any intention to work abroad in the near future. This is a promising indication that the governmental actions move in line with young people's interests and address their concerns.

INTRODUCTION

The release of the 7th edition of the Balkan Barometer comes at times when the world, hence also the Western Balkans, still face the perils of the economic crisis induced by the outbreak of the novel coronavirus and its Covid-19 disease. Yet, the 2021 edition of the Balkan Barometer builds on its firmly established tradition as independent, reliable source of regional data widely employed and referenced by media, business, civil society and decision makers alike.

The 2021 Balkan Barometer surveys were conducted between December 2020 and February 2021 in Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, Republic of North Macedonia and Serbia. The Public Opinion survey posed 117 questions to 6000 citizens and the Business Opinion survey presented 110 questions to 1200 business owners, managers or executives. Answers by survey respondents have been systemised, analysed and presented in the two reports – Public Opinion Survey and Business Opinion Survey.

The Balkan Barometer is yet again enriched in terms of questions and topics covered in an attempt to remain comprehensive, up-to-date and relevant in a challenging regional Covid-19-induced landscape. The Balkan Barometer remains an independent guide to attitudes towards cooperation and integration, as well as attitudes to other key policy areas both at domestic and regional levels that affect the daily lives of the Western Balkans citizens. Its findings help to inform the work of decision makers, scholars and all interested regional stakeholders, by also making them aware of the societal eagerness for sustainable and far-reaching reforms. Last but not least, this Barometer edition sheds light to the manifestation of the need for resilience and adaptability in civic activism and public governance in the face of political and economic crises induced by COVID-19 pandemic.

* This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence

KEY FINDINGS

Results of all seven cycles of the Barometer show ongoing incremental improvements in sentiment in the region. Yet, while the Balkan Public Sentiment Index (BPSI) has grown for about 10% since 2014, the same cannot be said for future expectations, which dropped sharply by 12%. BPSI declined abruptly since 2019, by 27 points, mostly in Albania. Moreover, citizens' sentiment and outlook of the economic situation did not change since 2019 (46%).

Despite a moderate drop, an underlying sentiment of solidarity pervades the Western Balkans, with close to two-thirds focusing on what brings the region together rather than what drives it apart. Citizens increasingly associate a non-positive outlook with the region: the proportion of respondents associating positive feelings with the region has contracted to 36% since 2019, while one third of them have an instinctively negative reaction.

Results of this round show a significant development in perceptions of security. At regional level, roughly half of respondents do not feel threatened at all, while one out of two feels insecure. Results also show that Bosnia and Herzegovina is the region's most insecure economy: the fact that the number of citizens who feel unsafe is almost double the number of those who do feel safe, is an alarming bell.

Once again, citizens of the Western Balkans showed wide support for regional cooperation . Overall, an overwhelming majority of respondents support its role in improving the political, economic and security situation in their home economies (77%). The fact that over three-fourth of participants observe improvement shows a remarkable if not unprecedented positive change. After last year's negative appraisal, this rejuvenated positive view is an encouraging signal of citizens' increased trust in the potential of regional cooperation in promoting socio-economic recovery after COVID-19.

In addition, **EU accession continues to be seen as a positive development.** Results show a subtle increase in support for EU membership across the region, with 62% endorsing accession (59% in 2019 and 56% in 2018). However, every year, the EU integration expectations in the Western Balkans dissipate notably, with only one-fourth of respondents remaining optimistic about the EU accession by 2025. This is again indicative of a more realistic outlook on the region's accession prospects.

After several years of relative stagnation in perceiving socio-economic status, improvements in the overall economic situation seem to be translating into tangible benefits across the region. The vast majority of citizens in the Western Balkans describing their socio-economic status as average (77%) has slightly increased since 2019, while the share of those who claim that their standard of living is above average (5%) has not changed. Interestingly, this perception seemingly diverges from the finding that the number of below-average respondents is decreasing, with the rank of the so-called middle class swelling accordingly. However, an increase of the share of both citizens whose life standard is below average and of those above it in some economies indicates a trend towards less equal societies.

While **unemployment remains a challenge across the region, particularly among youth and women,** there is a growing number of participants who think that education and hard work are the main preconditions for getting ahead in life and finding a job. Some 58% feel that having a good education and working hard are equally important contributors for a better future, while 38% find job qualifications and education as the most important asset to find a job. 54% claim that knowing the right people is important for a bright future, while more than a third believe that luck will get you ahead in life.

Somewhat encouragingly, the share of respondents who are seriously considering leaving their economy has declined by 6 points (going from 43% in 2019, to 37% in 2020), while over a half (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%, while roughly one-fifth prefer the United States, and only 7% claim they would work abroad inside the region.

In terms of ICT, simultaneously to digitalisation's incremental impact in everyday life, there has been a **growing trend of advancing one's digital skills.** Free online training, or self-study, remains the predominant source of learning on digitalisation. The Western Balkans are frequent internet users: roughly 39% of the population use internet for two to three hours daily and more than one-fourth for at least one hour. Respondents in Bosnia and Herzegovina use it most frequently, for more than two hours daily, while Kosovo* has the lowest share of participants who don't use the internet at all (3%).

Empathy for the socially excluded is not universal and unfortunately it depends on their identity and membership of a particular group. Though this cycle of the Barometer records a visible empathy for the socially excluded groups, affirmative actions are still considered far fonder for some groups than for others, with Roma once more pushed to the economic and social margins. Employment measures for the disabled are supported the most (by 92% of respondents), while fewer feel that special privileges should be given to members of the Roma community (79%) or other minorities (81%).

The disparity between different groups of marginalised people is most obvious in the Republic of North Macedonia, where 91% of participants support affirmative action in employment for people with disabilities, as opposed to support for refugees (58%), Roma (70%) and other minority groups (72%). On the other hand, Kosovo* (where 91% to 98% of respondents favour affirmative measures for the excluded), is the region's outlier, with the most comprehensive empathy towards these groups in terms of equal access to the labour market.

It is also encouraging that most respondents (58%) remain supportive of strengthening commercial ties within the region. As it has become customary, the majority (68%) expects that the entry of foreign companies into the domestic market will improve conditions for costumers. In addition, for the first time **since the inception of the Barometer, the EU is perceived as the most preferred trading partner, with two-thirds advocating for further improvement of trade and investment links with it.**

With connectivity prioritised increasingly in the Western Balkans' efforts on the economic integration, regionally and with the EU, citizen's perceptions of the quality of transport have improved slightly. More respondents are satisfied with the quality of regional transportation and infrastructure connections (64%) than with that within their economies (59%). The EU's policy agenda and investment priorities in infrastructure in the region are broadening and converging with other areas such as environment, energy, digitalisation and social infrastructure.

The level of climate awareness remains high: three-quarters of respondents are concerned with climate change and pollution and 62% are willing to pay more for environmentally friendly products. This shows that the need to invest in the region in curbing climate change and in energy is even bigger given the EU's goal to go carbon free by 2050. This shift is reflected in the Green Agenda for the Western Balkans and Economic and Investment Plan for the Western Balkans. While the Green Agenda is effectively an extension of the European Green Deal to the region, the Plan foresees investments of up to EUR 29 billion by 2027, including in long-term reforms in energy and environment needed in order to achieve climate neutrality.

Trust in institutions has improved slightly, yet key aspects such as the rule of law, equality before law and their treatment by public institutions have seen stagnation. While three-quarters of participants have received public services online over the last year and over a half are satisfied with timely provision of public information requested, large majority thinks that the law is not applied effectively (58%) or equally (68%, 8% more than in 2019). The majority of respondents (61%) distrust parliaments and courts, while over a half of them assess their judiciaries' performance as poor or very poor against four out of five performance criteria surveyed (length of proceedings, accessibility, cost of proceedings, execution of judgements, and transparency).

Over a half of respondents in the region disagree with the proposition that judicial systems, ombudsperson institutions, supreme audit institutions and media are independent of political influence. Healthcare, political parties and rule of law institutions remain perceived among the most corrupt. 14% of participants reported having bribed the former and 8% of them the police. Political parties (by 78%), judiciaries (by 76%), customs (by 75%), healthcare services (by 74%) and parliaments (by 71%) are the five most corrupt categories.

There seems to be a clear correlation between low trust in institutions and government performance, as well as their perceived independence and vulnerability to corruption, on the one hand, and apathy towards government decision-making, on the other. Over one-third of respondents admit to have never discussed government affairs during the last year. Another 24% feel totally disinterested, while 20% find themselves powerless to influence government's decisions.

Threat perception and present situation assessment constitute a new chapter introduced in this edition of the Barometer, focusing on the COVID-19 pandemic. Three-quarters of respondents see a high level of threat to their national economies. Economic impact of Covid-19 remains the main risk, 43% are concerned about losing their own or their family members' jobs in the next 12 months, and 46% report that their income has decreased. At the economy level, unemployment is actually more worrying for citizens than the virus itself. It is seen as a concern by 57% to 69% of respondents.

There is also widespread scepticism among the survey population over governments' efforts to protect people from losing their jobs during the pandemic. Overall, 39% disagree that their governments are doing enough, 34% are neutral, and 18% think they do enough. Again, Bosnia and Hercegovina (57%) is the most pessimistic, as opposed to Serbia (23%). As expected, most respondents (60%) see medical professionals as the most credible sources of information on the pandemic, while over two-thirds express concern over falling victims of pandemic-related disinformation. Given the economic impact of the pandemic, it is no surprise that over half of populations (56%) prioritise economic recovery over health and wellbeing (29%), social progress (14%) and environmental protection (2%).

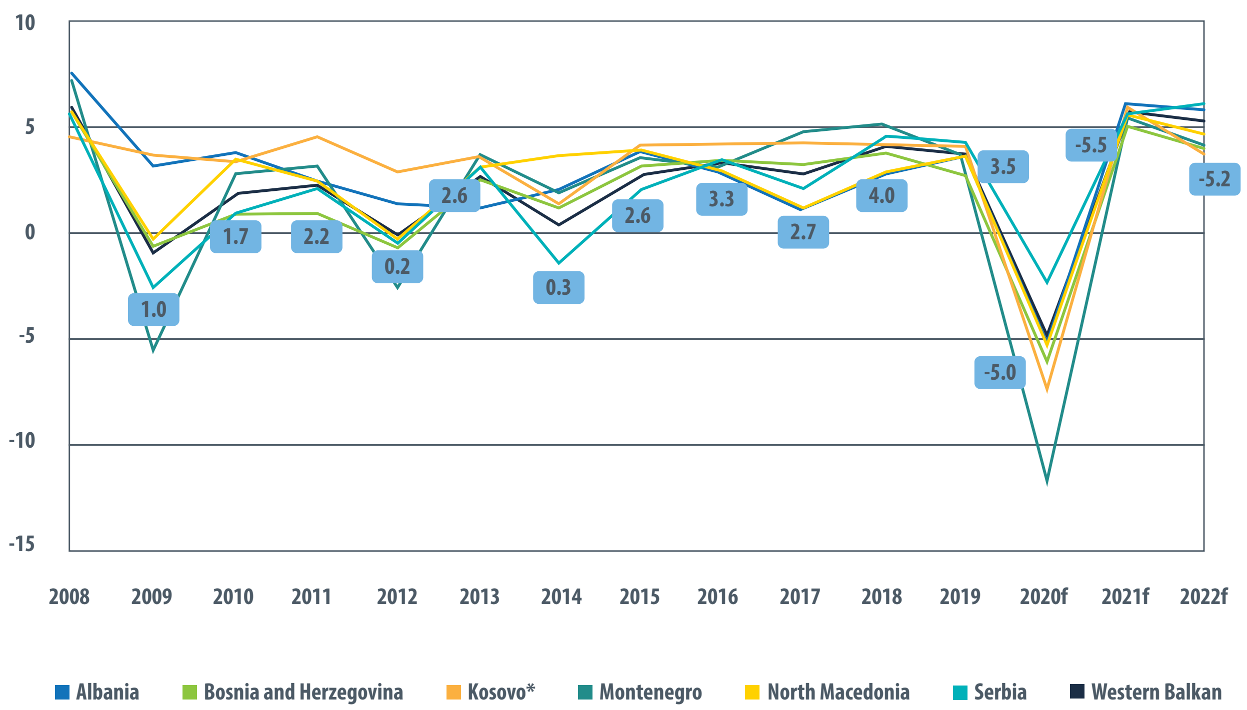
REGIONAL OVERVIEW

The release of the 7th edition of the Balkan Barometer comes at a time when the Western Balkans strives to manage and mitigate the implications of the coronavirus pandemic. Its outbreak in March 2020 led to a major health crisis across the region, hitting both supply and demand and causing deep recession on all Western Balkan economies over 2020. While the most negative economic effect was seen in the second quarter of the year, the return to normality has not yet been achieved because not only the second wave of the virus in the autumn of 2020 contained restrictions to movement and economic activity to a significant extent, but also the third wave is looming at the end of the first quarter in 2021.

The real output loss amounted to -5% in the Western Balkan economies in 2020 (Figure 1). While these figures are yet not final (i.e., present the latest forecasts), they suggest that the WB economies have not seen such dramatic decline for the last decade, not even during the Global Financial Crisis of 2008-09. There is some variation in the GDP decline in 2020: Montenegro faced the severest drop of -12% (reflecting the hit on the tourism sector), followed by Albania and Kosovo* (-7.5% each), Bosnia and Herzegovina (-6.5%), Republic of North Macedonia (-5.4%), while the smallest decline is observed in Serbia (-2.5%).

IMF projections suggest that the WB economies are expected to return to the pre-pandemic GDP level by the end of 2021, on the assumption that the pandemic is bridled to a large extent by the process of immunisation. An average WB growth of 5.5% is expected over 2021, with growth rates ranging between 5.5% and 6.1% across the region. Such growth pace is expected to slightly decelerate in 2022 (a projected average GDP growth across WB of 5.2%). However, such a construct is largely dependent on the coping with the crisis

Figure 1: Real GDP Growth in the Western Balkans 2008-2022



(Source: IMF World Economic Outlook, WB GDP weighted average growth rate)

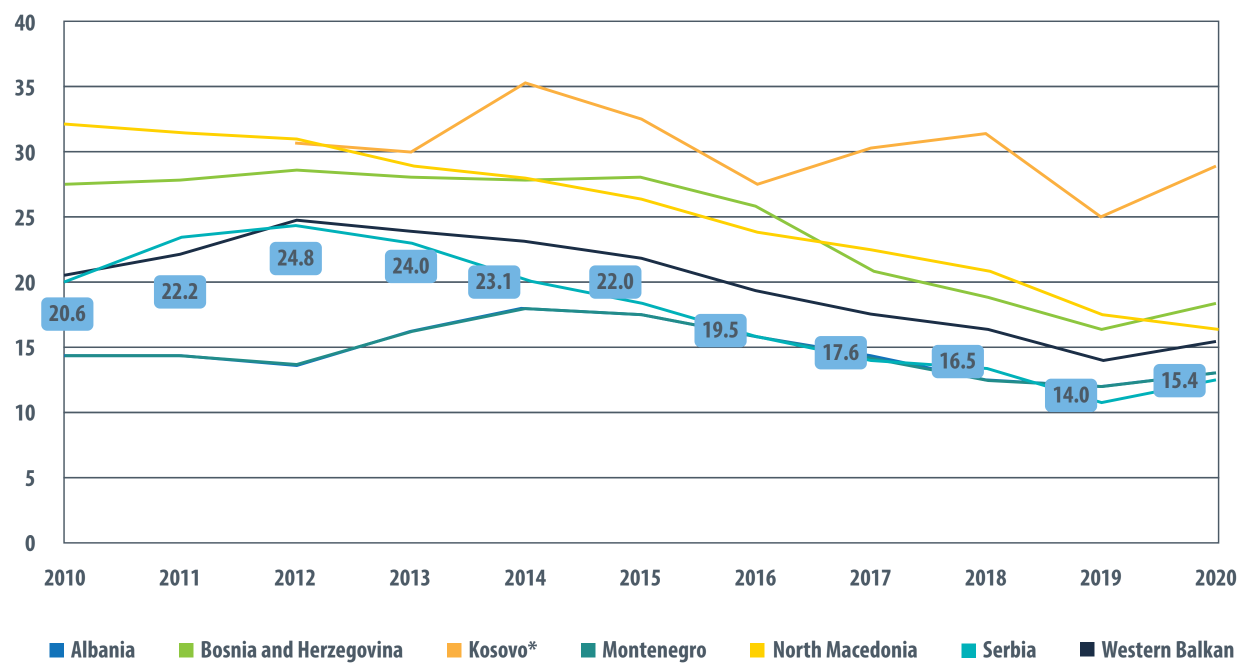
which is yet difficult for the economies even in the first quarter of 2021. Delays in the process of immunisation may postpone the return to normal economic activity, hence also postponing the reaping of higher growth rates that will compensate the 2020 slump.

To contain the GDP decline, save jobs and alleviate income fallouts, the economies across the region undertook a palette of measures, large part of which were considered timely. The key weapon against the socio-economic consequences of the pandemic has been the direct subsidisation of workers' wages and the direct support to income of citizens, either through expanding existing social assistance schemes or through offering one-off financial aid for the most vulnerable segments. Companies, and particularly small and medium-sized enterprises, were assisted with favourable loans (usually deployed through the development banks), deferral of tax and other duties, one-off support (grants) to the most vulnerable small businesses and so on.

Amid the pandemic, in some Western Balkans economies, the decennial reducing trend of unemployment rate has been halted (Figure 2). For these WB economies, the decline of unemployment rates which started in 2012 was reversed in 2020. On the other hand, in some WB economies the unemployment rates continued to fall even during 2020. Compared to the GDPdeclines, the increases in unemployment rates in 2020 have been rather moderate, reflecting swift reactions of WB6 governments in deploying measures to safeguard jobs. Within the WB region, there are some distinctive patterns. Bosnia and Herzegovina, the Republic of North Macedonia and Serbia recorded a further decline of their unemployment rates, despite the pandemic, while the increases in unemployment rates in the rest of the WB6 economies were of different magnitudes.In 2020, the lowest increase in unemployment rates was recorded in Albania (0.2 p.p.), while the largest increase in unemployment rate was recorded in Montenegro (2.9 p.p.).

Figure 2: Unemployment rates in the Western Balkans, 2010-2020

(% of the labor force; LFS, 15-64 age group)



(Source: ESAP Observatory on employment in the Western Balkans, RCC ESAP 2 project based on data from official government sources in WB6. Note average data for Western Balkan for 2010, 2011 and 2020 are calculated based on data for five WB economies, since data for Kosovo* for these years is not available. Data labels shown are average unemployment rate for the Western Balkans region.

The pandemic of Covid-19 caused that fiscal deficit soar in all Western Balkan economies. Fiscal balances deteriorated as governments were spending to counter the economic contraction. The average deficit was projected to rise from 1.4% of GDP in 2019 to 8% in 2020. The stronger recessions in Montenegro, Kosovo* and Albania caused particularly large deficits there: 11.7%, 9.5% and 8.5%, respectively. Such fiscal deficits, inter alia, resulted from the progressive losing of public revenue, averaging 1.7% of GDP, on top of the revenue loss caused by the nominal contraction of GDP in 2020. On the other side, public spending jumped by 1.7 p.p. of GDP in the Republic of North Macedonia to 6.7 p.p. in Montenegro, while the regional average is 4.8 p.p.

Shortage of public funds amid the outbreak and spread of Covid-19 prompted Western Balkan governments to turn to international capital markets. In June 2020, the Republic of North Macedonia issued a six-year Eurobond worth 700 million EUR, with a coupon rate of 3.675%, Serbia a seven-year Eurobond worth 2 billion EUR at 3.125%, and Albania a seven-year Eurobond worth 650 million EUR at 3.65%. Multilateral support by the IMF, World Bank and the EU preceded or coincided the sourcing of funding on private markets to address immediate financing gaps. Such coordinated backing of the international financial institutions proved crucial to preserving debt sustainability. All economies except Serbia sought support from the IMF Rapid Financial Instrument to address urgent balance of payments needs, which then allowed them to apply for the EU Macro Financial Assistance.

BALKAN PUBLIC SENTIMENT INDEX (BPSI)

The Balkan Public Sentiment Index (BPSI) initially created to observe changes in present sentiment and viewpoint over time, was calculated for this cycle of the Balkan Barometer as well. In this instalment of the Balkan Barometer, the BPSI is composed of the seven following questions:

1.How satisfied are you with the way things are going in economy? (answers: 5-point scale);

2.How satisfied are you with the economic situation in economy? (answers: 5-point scale);

3.How satisfied are you with the financial situation of your household? (answers: 5-point scale);

4.How satisfied are you with the way economy tackles security challenges? (answers: 5-point scale);

5.What are your expectations for the next year? Do you think that in 12 months your financial situation will be better, worse, or the same?

BPSI is a measurement of the current situation and expectations for the future in terms of the economic situation in society, as well as the current state of affairs of individual households which participate in the survey. It monitors changes over time starting from the individual economies' level up to changes at the regional level.

The index is structured in a six-point scale answers for Q1 to Q4, scored as follows: I'm completely dissatisfied - 0 points, I'm mostly unsatisfied – 25 points, neither satisfied nor dissatisfied – 50 points, I'm mostly satisfied – 75 points, I'm completely satisfied – 100 points.

BPSI is composed of two sub-indexes, BPSI-Present Situation Index and BPSI-Expectation Index, which separately monitor the present sentiment of SEE citizens as well as their expectations for the future. The BPSI results are then compared with the results of the previous cycles in a regional and economy level separately.

The following presents BPSI results for 2020 and comparison with results for the previous cycles, both for the Western Balkans' region as a whole and for each economy separately.

Figure 3: Balkan Public Sentiment Index (BPSI)

(Scores on a scale from 0 to 100)

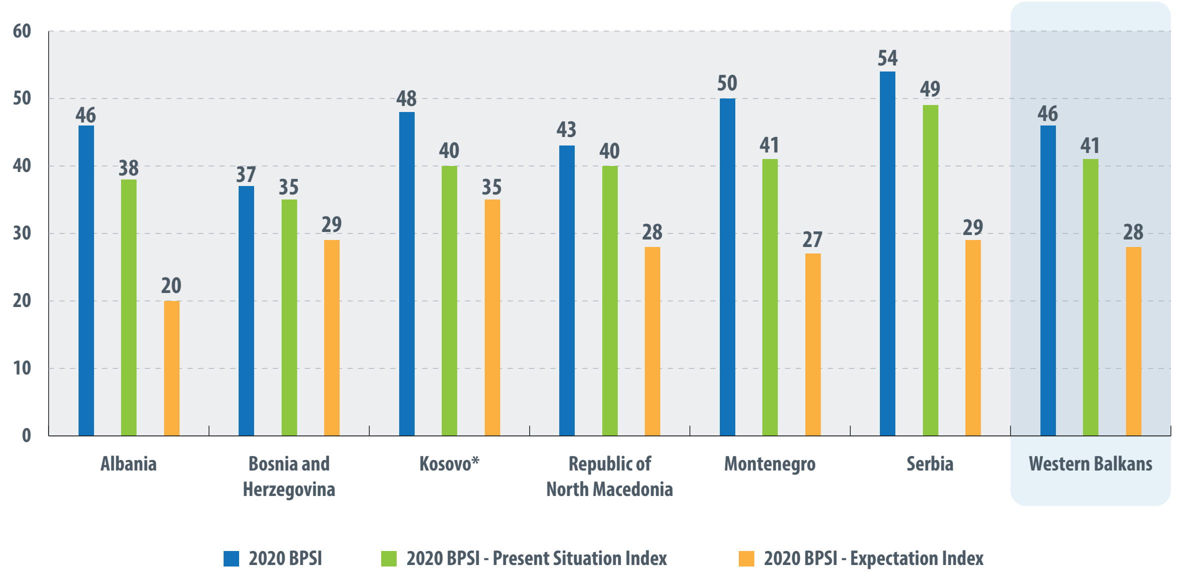
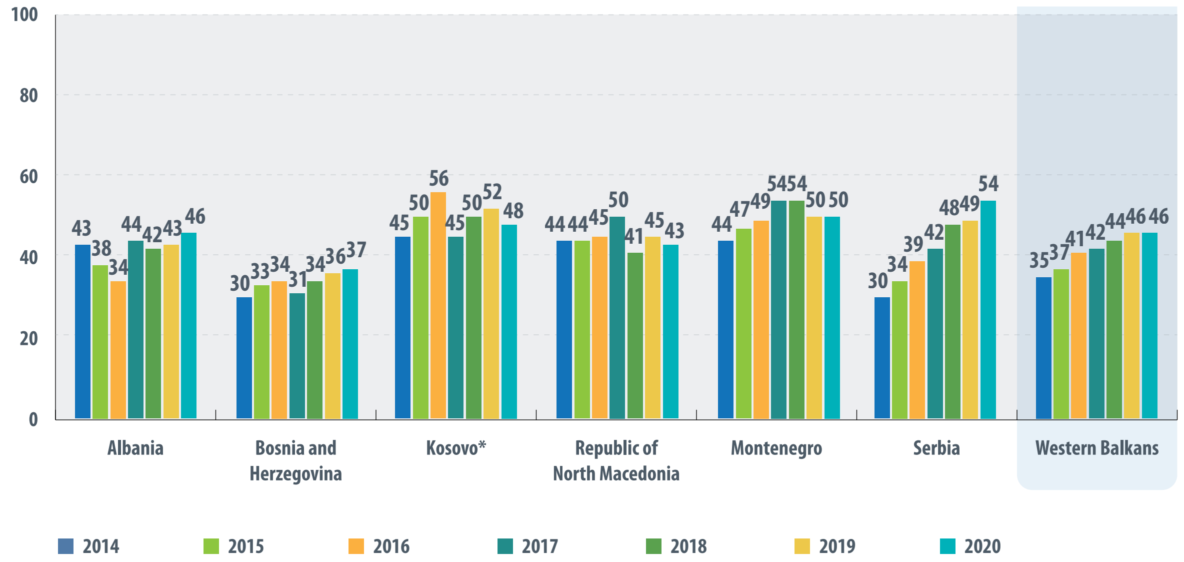


Figure 4: Balkan Public Sentiment Index (BPSI) – comparison 2014/2015/2016/2017/2018/2019/2020

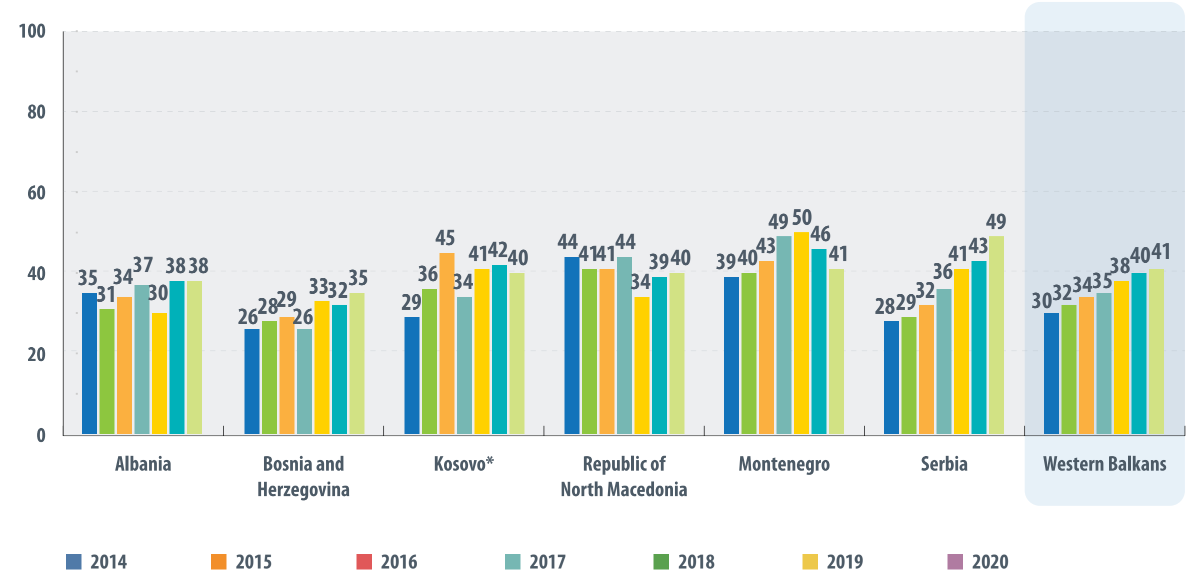
(Scores on a scale from 0 to 100)



In a time-span of 7 years, the regional BPSI incremented moderately (46% in comparison to 35% in 2014). Despite the unprecedented pandemic situation, the population's sentiment and outlook of the economic situation remained unchanged, compared to 2019 (46%).

Figure 5: Balkan Public Sentiment Index (BPSI) - Present Situation Index – comparison 2014/2015/2016/2017/2018/2019/2020

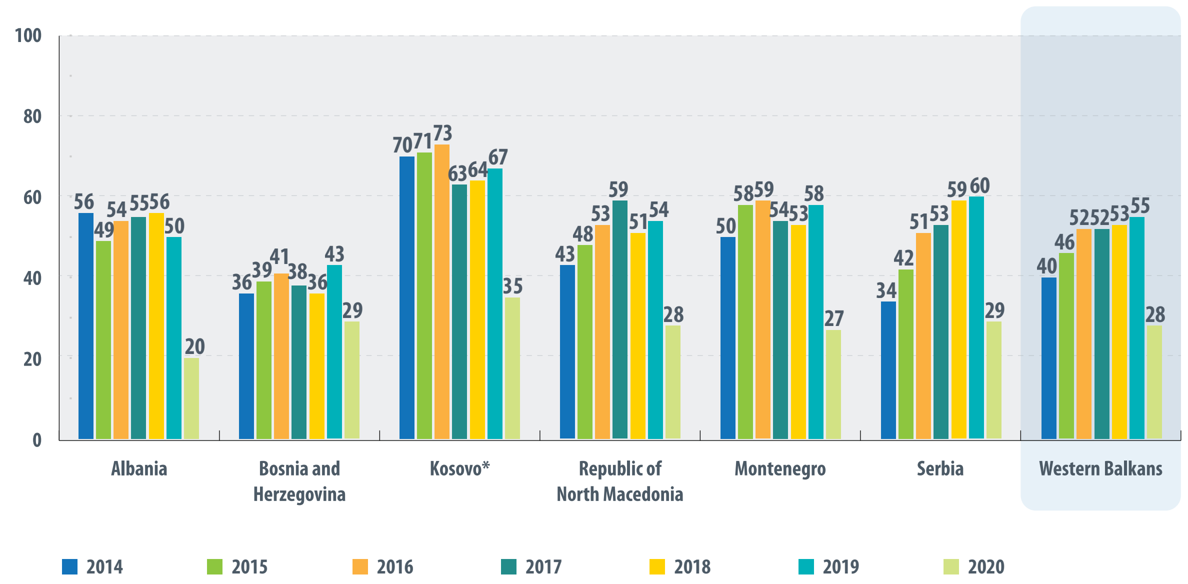
(Scores on a scale from 0 to 100)



Whilst the public sentiment for the present situation remains high (41%, from 40% in 2019), the expectations for the future have significantly declined (28% compared to 55% in 2019). Albania is the economy with the sharpest decline on expectations for the future over the years.

From an above-average level of optimism, Albania has not only halved its optimistic perspective, but also recorded the lowest level of expectations for the future during the last seven years, both at national as well as the regional level (20% from 56% in 2014). Kosovo* has the highest expectations in the region, although these expectations have declined by half in 2020 (35% from 67% in 2019).

Figure 6: Balkan Public Sentiment Index (BPSI) – Expectation Index – comparison 2014/2015/2016/2017/2018/2019/2020



Overall, results of all seven cycles of the Barometer show that the regional life satisfaction continues to increment moderately. While BPSI has grown significantly over the years (46%, from 35% in 2014), the same cannot be said for future expectations, which sharply dropped by 12 points (28% from 55% in 2019, and from 40% in 2014).

From a closer perspective, results by economy indicate that over the 7-year period, Serbia leads on public sentiment survey, scoring a remarkable 24-point rise across the period. This improvement comes mostly as a result of a good economic performance followed by the lowest unemployment rate in the last decade. In contrast, Bosnia and Herzegovina, despite a 7-point increment in public sentiment (from 30% in 2014 to 37% in 2020), remains the economy with the lowest level of life satisfaction in the Western Balkans.

Year-on-year results show that again, Serbia has experienced the most notable increase in general satisfaction, with a 5-point rise (54%, from 49% in 2019). On the contrary, the most sizable drop in overall satisfaction was seen in Kosovo*, with a 4-point decrease in BPSI (48%, from 52% in 2019). The other four economies in the region have all seen fluctuations between 1 and 3 points.

LIFE SATISFACTION AND ASSESMENTS OF GENERAL TRENDS

An underlying sentiment of solidarity pervades the Western Balkans, with close to two-thirds (59%) of all respondents focusing on what brings the region together rather than what drives it apart, though this solidarity sentiment has subtracted since 2019.

With every passing year, citizens are associating gloomy outlook with the region. While last year 39% of citizens associated positive feelings with the region, the percentage of citizens sharing the same attitude in 2020 has contracted to 36%. On the other hand, one third of the population has an instinctively negative reaction.

Without exception, all Western Balkan economies show a significant proportion of negative sentiment about the current economic situation. Overall, the number of dissatisfied respondents has decreased by only two points (54%, from 56% in 2019), while 17% are happy with the economy.

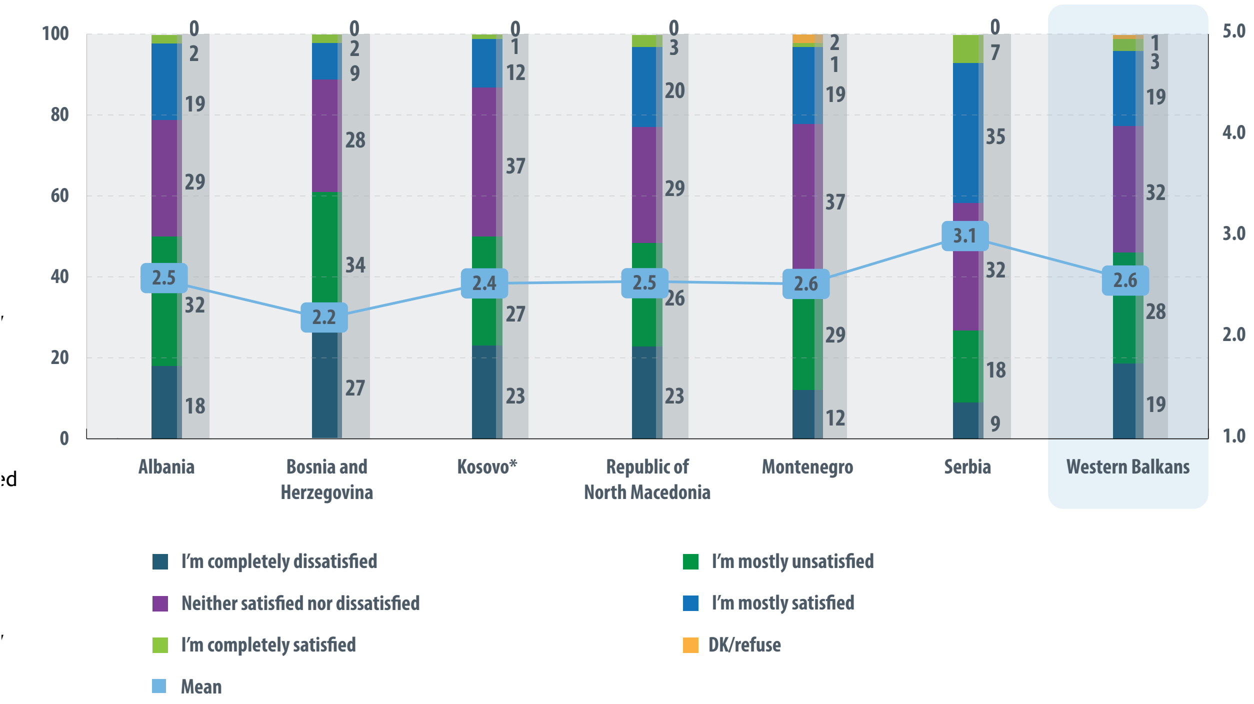
On the other hand, the number of citizens who are not happy with the way things are developing in their economy is twice as high as the number of those who describe themselves as satisfied. Unemployment and economic development continue to be the two key problems facing the region, spiking to a significantly higher degree than in previous year; unemployment being considered the main challenge by a half of the Western Balkans. At the regional level, it looks like citizens' expectation concerning the state of their economy did not change much from last year. Roughly one-third of the respondents seem to expect their economy to improve, compared to roughly one-fourth of them who are pessimistic about the future state of their economy.

Violence against women is consecutively considered the most flagged issue by the region's respondents, (65%). Prejudice about gender roles in society is again the second most prevalent concern, while inequality in remuneration between men and women is an alarming concern for one-fourth of residents.

Government investment is seen as a necessary tool for growth, and there is a noted increase in public awareness on the importance of investment in sectors substantial for the economy. Across the region, there has been a sharp rise in the number of citizens who think that each specific spectrum requires government's attention as a priority for investment. Social infrastructure (such as schools, hospitals etc.) is considered the top priority by almost a half of the population. This sector is followed by agriculture, education and culture, SMEs and investment in transport infrastructure.

Figure 7: How satisfied are you with the way things are going in your economy?[2]

(All respondents, N=6000, share of total, %) scale from 1 to 5, share of total, %)



Results show that the number of respondents who are not happy with the way things are developing in the economy is twice as high as the number of those who describe themselves as satisfied, thus consolidating the trend of previous instalments of the Barometer. In statistical terms, 22% of respondents are either mostly or completely satisfied, 47% have opposite feelings, while 32% have a neutral attitude on developments in their economy[3].

Although results indicate a proliferation of public sentiment which reflects dissatisfaction with the way things are going in the economy, the level of citizens' dissatisfaction has decreased (47%, from 51% in 2019). On the other hand, there is a minimal change in the percentage of participants who describe themselves as mostly or completely satisfied (22%, from 21% as in 2019). Citizens who were neither satisfied nor dissatisfied make 32% of the entire population or 4% more than last year, while 1% of respondents chose not to answer this survey question.

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

At economy level, Serbia is home to the lowest concentration of dissatisfied respondents (27%), followed by Montenegro with 41%. On the opposite side of the coin stands Bosnia and Herzegovina, which earned the epithet of the economy with the highest rate of dissatisfied respondents for the sixth time (61%), followed by Kosovo* and Albania, which share the same level of public dissatisfaction (50%). Meanwhile, the Republic of North Macedonia stands in the same position as last year.

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

[3] Methodological note: Discrepancies noted between Balkan Barometer and SecuriMeter as regards the percentage of respondents who are not happy with the way things are developing in their respective economy result from the different Sample Structure and Methodology approach used by the respective surveys.

Figure 8: How satisfied are you with the economic situation in your economy?

(All respondents, N=6000, share of total, %) scale from 1 to 5, share of total, %)

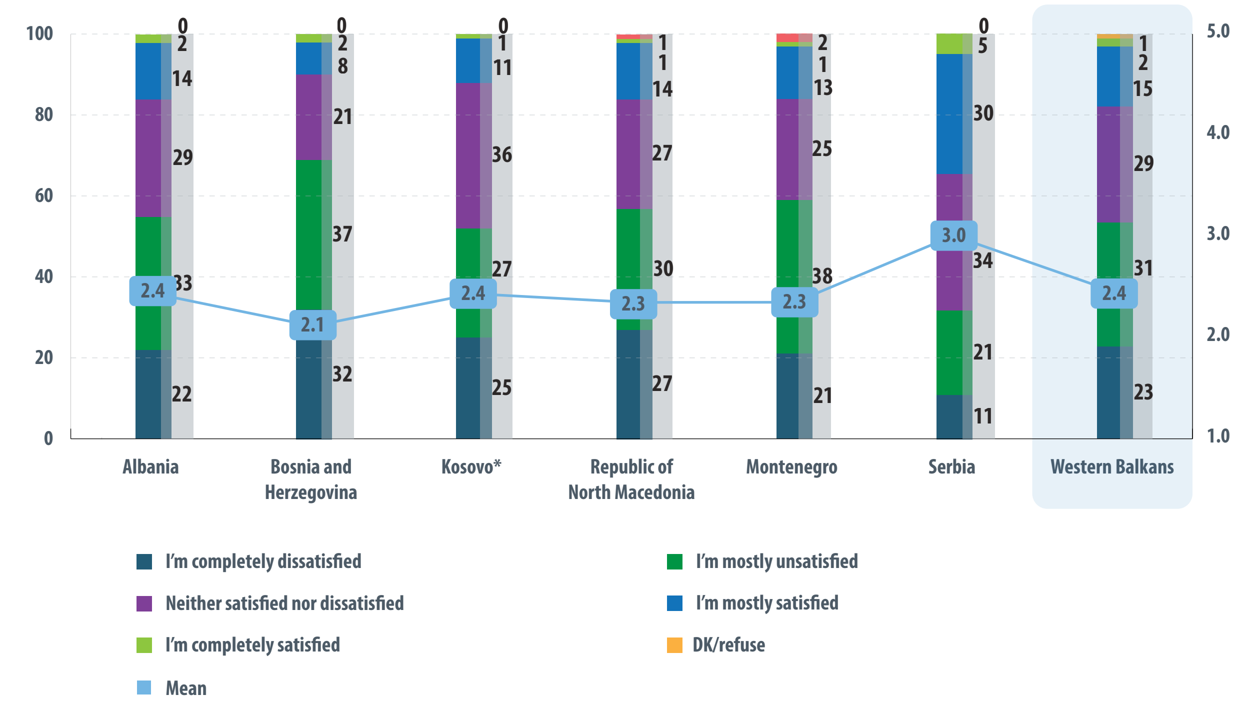
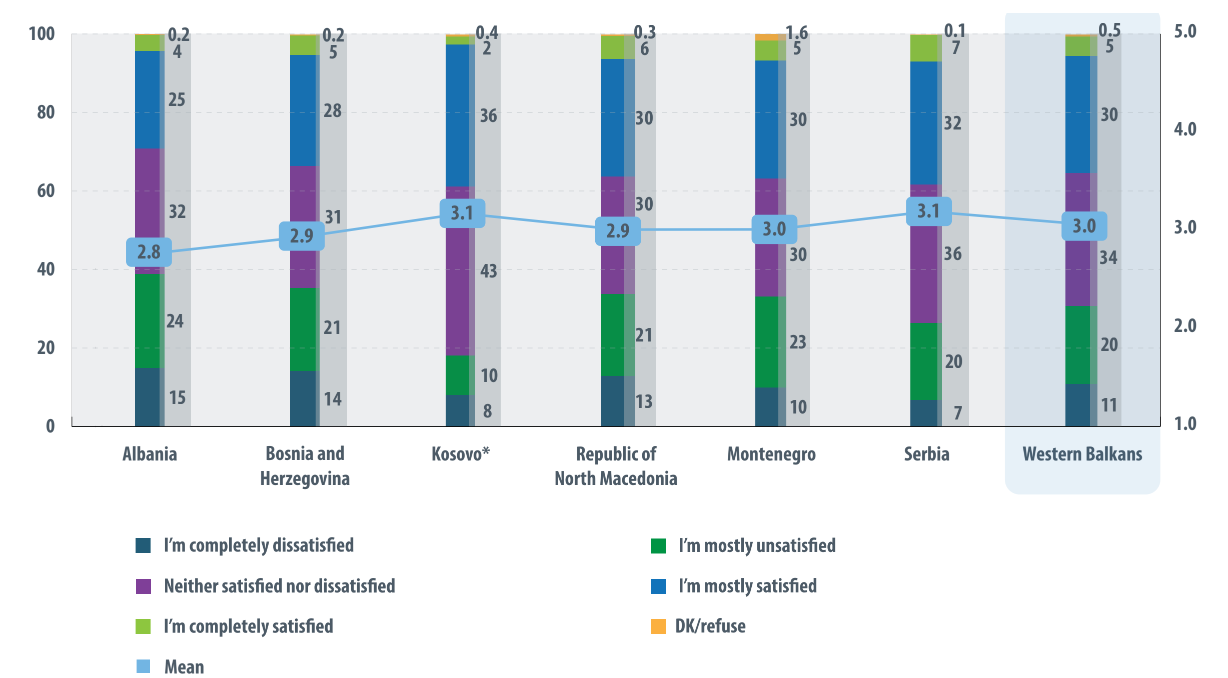


Figure 9: How satisfied are you with the financial situation of your household?

(All respondents, N=6000, share of total, %) scale from 1 to 5, share of total, %)



Without exception, all Western Balkan economies share a significant negative sentiment about the current economic situation. Overall, the number of dissatisfied respondents has decreased by two points, (54%, from 56% in 2019), while 17% are happy with the economy.

At economy level, negative public sentiment fluctuates between two extremes; approximately one-third of Serbian citizens (32%) affirm they are unhappy with the economic situation, while the number of dissatisfied respondents from Bosnia and Herzegovina makes two-thirds of the population (69%). Some 59% of respondents from Montenegro feel that the economic situation in their economy significantly deteriorated over the past year- a 19-point increase of dissatisfied participants compared to the previous year (40% in 2019).

Findings show that some other economies followed an opposite trend to that of Bosnia and Herzegovina and Montenegro. Albania and Kosovo*, saw a notable decrease of the negative contingent, scoring a contraction of 7 points and 5 points respectively. Analogous to the results from the previous question, the percentage of people who chose not to answer this question has increased by 3 points (29% from 26% in 2019).

For the second time, the respondents unhappy with their financial situation no longer outnumber their more prosperous counterparts. To illustrate it, the two groups make 35% and 31% of the population, in favour of the positive contingent. Respondents tend to overwhelmingly view their own situation in more positive terms than that of their economy; while less than one fifth (17%) see their economy as doing well (as showed in figure 8), and more than a third (35%) describe their household financial situation as positive. This discrepancy likely results from a long-standing tendency in the region to view developments at economy level as overwhelmingly detrimental to prosperity, versus what is objectively perceived at household level.

All economies in the region record an increase in the number of satisfied respondents, a strong indication that the effects of growth taking place over the past several years are beginning to translate into individual gains. Albania is still the regional leader when it comes to unhappy respondents with 39%, while less than one-fifth are unhappy in Kosovo* (18%), making it the region's most financially satisfied economy. In addition, the number of Western Balkan residents who are neither satisfied nor dissatisfied has subtracted by 3 points (34%).

Figure 10: How satisfied are you with the way your economy tackles security challenges?

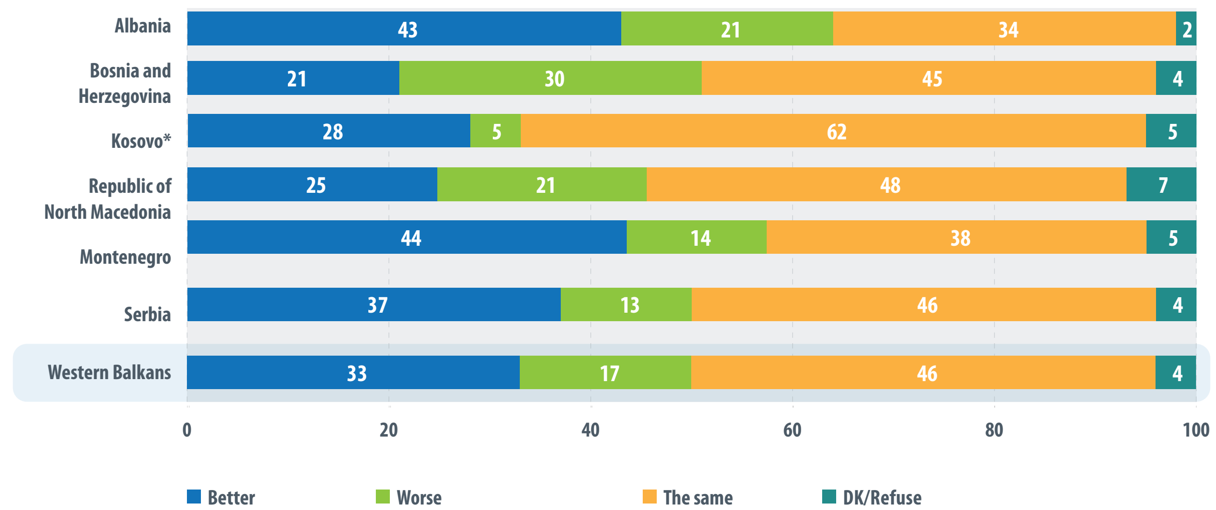
(All respondents, N=6000, share of total, %) scale from 1 to 5, share of total, %)

Despite improvements in the economic status of individual households, it seems that general satisfaction with the way economy tackles security challenges has not changed much. Results paint a biased economic environment, as it tackles new and emerging security threats and challenges at regional level. However, there has been a notable decrease of mostly/completely dissatisfied respondents by 7 points, with more than a third presently unhappy (39%).

Once again, Serbia (19%) remains home to the lowest concentration of unhappy residents, followed by Republic of North Macedonia (37%) and Montenegro (34%), with the latter being the only regional economy to remain in the same position for two years. Bosnia and Herzegovina, on the other hand, stands out again with its residents' stark assessment, with 63% presently dissatisfied. From an economy point of view, this should be seen as an urgent call to act for affected governments, especially as they look to tackle current and upcoming security challenges.

Figure 11: What are your expectations for the next year? Do you think that in 12 months your financial situation will be

(All respondents, N=6000, share of total, %) scale from 1 to 5, share of total, %)



Similar results as in the previous Balkan Barometer edition have been observed in this section (Figure 11), With an increase by 1 point, one-third of the region's residents (33%) feel that their financial situation will get better, while less than one-fifth (17%) expect to see a deterioration in their finances in the near future. In addition, findings indicate a regional cutback of respondents who do not expect any changes in their financial prospects (46%, from 48% in 2019).

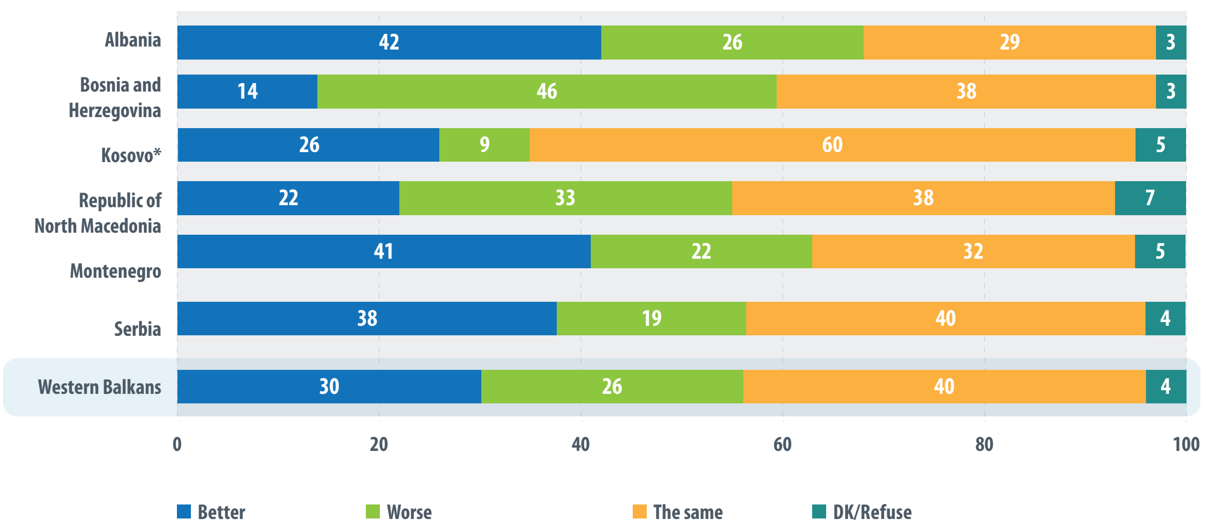
At the economy level, the Barometer records a cumulative 9-points spike in the number of Montenegrins who see their financial situation through optimistic lenses, reaching a total of 44%, while 14% expect their finances to worsen. Albania also marks a similar, if not remarkable, increase by 18-points, with 43% indicating their optimism regarding their finances in the near future, while 21% express their concern for their future financial situation.

On the other hand, Kosovo* has ascended the throne of the most optimistic economy in the region, thus recording a 19-point decrease of optimistic respondents. At present, 28% of Kosovo* residents expect their finances to improve, while a significantly low percentage (5%) thinks that their financial situation will get worse.

Meanwhile, Bosnia and Herzegovina is the only economy where the pessimists outnumber the optimists (30% vs. 21%). 25% of respondents in Republic of North Macedonia expect to see an improvement in their finances, while 21% believe it will deteriorate. Montenegro has also seen an increase in overall respondent satisfaction, at an eloquent 9-point, with 44% of its residents indicating an optimistic sentiment of their finances in the next 12 months.

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

(All respondents, N=6000, share of total, %) scale from 1 to 5, share of total, %)



At the regional level, it looks like citizens' expectations on the state of their economy did not change much from the last year. Roughly one-third of respondents (30%) seem to expect their economy to improve, compared to roughly one-fourth who stand pessimistic regarding the future state of their economy (26%, from 25% in 2019). There is a significant growing positivity for the future in Albania, with the economy recording the region's largest year-on-year increase in the number of optimistic respondents (+17).

The region's leading pessimist is again Bosnia and Herzegovina, with this year's results representing a 2-point rise in the economy's overwhelmingly gloomy predictions for the future (only 14% expect a better economic situation in the next 12 months). Compared to previous instalments, this cycle of Barometer recorded a decline of respondents who see no change in the state of economy, thus representing 40% of the population (from 43% in 2019).

Unemployment and economic development remain two key problems facing the region. Unemployment is considered the main challenge by 49% of respondents (up from 45% in 2019). On the other hand, the current economic situation is ranked as the most detrimental obstacle by 46% of the Western Balkans. Corruption, meanwhile, is ranked third for two consecutive rounds, though its prevalence has subtracted to 26% (down from 31% in 2019). Meanwhile, the number of respondents worried about the health system in their economies has remarkably increased at regional level, with 17% of participants being concerned over the health sector.

Unemployment and the economic situation are listed as chief concerns in Albania, Montenegro, Bosnia and Herzegovina, and Kosovo*, while economic situation leads the list of challenges in Republic of North Macedonia and Serbia. Albania and Kosovo* in particular, experience a high degree of anxiety over both unemployment (56%) and economic situation (54% and 52% respectively), while Serbia is more concerned with the economic situation (42%). Crime is frequently cited by respondents of Bosnia and Herzegovina (21%), Serbia (22%) and Montenegro (21%) as areas of relatively high concern. The COVID-19 pandemic has not only unfolded socio-economic consequences, but has also stricken the regional health system, causing even more insecurity in the public eye.

Results indicate a significant drop in the number of respondents claiming that brain drain and emigration represent a key challenge for their economies, which in particular, has decreased by 4 points since 2019.

Political disputes are most commonly noted as a problem in Republic of North Macedonia (11%) and Bosnia and Herzegovina (10%).

Figure 13: What do you think are the two most important problems facing your economy?

(All respondents, N=6000, share of total, %) scale from 1 to 5, share of total, %)

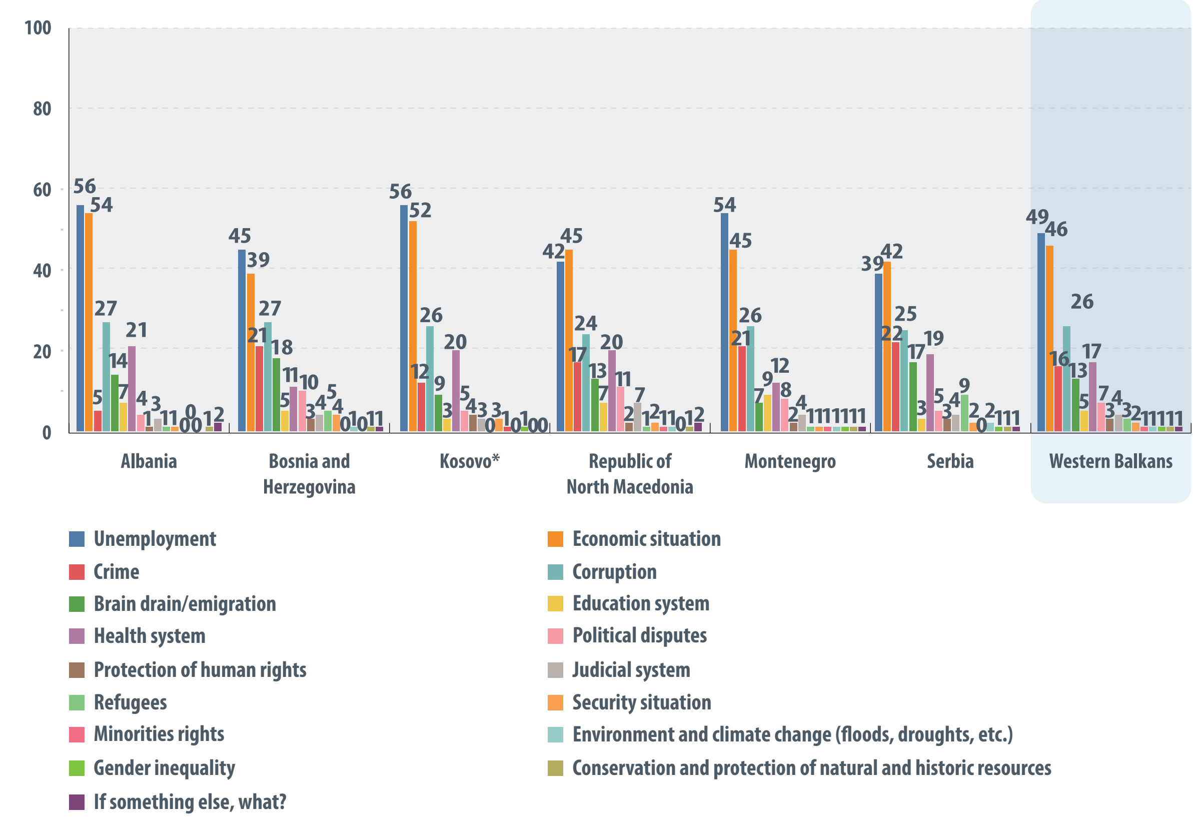
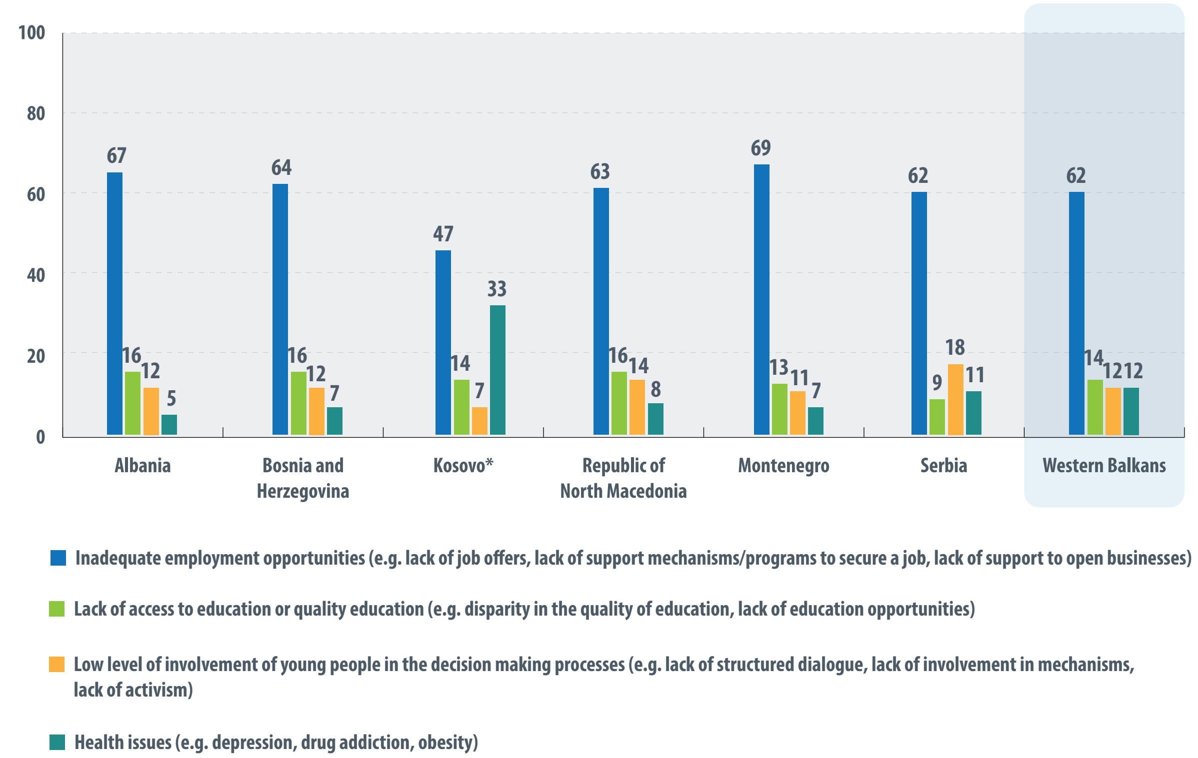


Figure 14: What, in your opinion, is the biggest problem that young people face today?

(All respondents, N=6000, share of total, %) scale from 1 to 5, share of total, %)



Inadequate employment opportunities are unanimously seen as the most persuasive challenge for the young people in the Western Balkans, with above half of respondents (62%) considering it the main concern. COVID-19 crisis caused the loss of thousands of jobs in less than a year. As youth constitutes 21.27% of the entire Western Balkans population, this should be taken as an urgent call for governments to actively engage in employment policies and measures, with a special focus on youth.

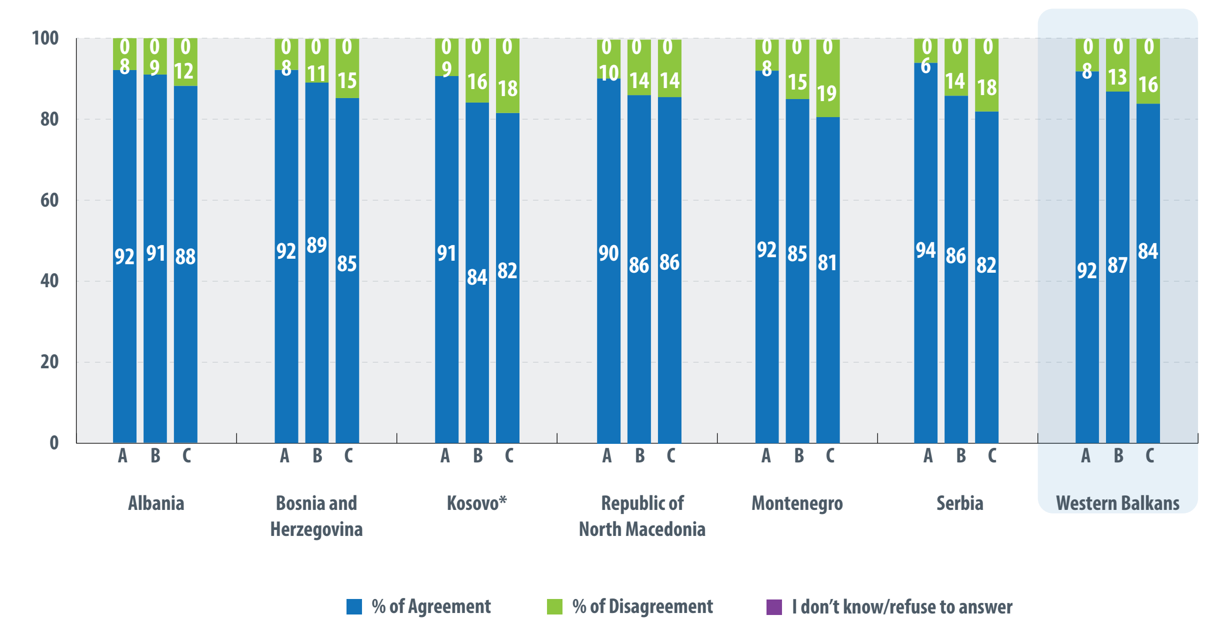
Meanwhile, lack of access to education, young people's involvement in the decision-making process as well as health issues fall far behind in the list, since less than one-sixth rate these challenges as predominant. Only 14% see lack of access to education as the main impediment, while 12% of the region's participants think that youth in decision-making process and health issues in young people represent a significant challenge that requires immediate government's attention.

If we subtract the results for individual economies, Montenegro (69%) leads the list of economies dissatisfied with employment opportunities for young people, albeit with an insignificant difference from its neighbour economies. Paradoxically, Kosovo* residents (47%) preoccupied with the inadequate employment opportunities are less in number compared to the other Balkan economies, despite the fact that Kosovo* is the economy with the highest rate of youth unemployment. In addition, one-third of Kosovo* citizens see depression and drug addiction as prevalent obstacles for the youth.

Figure 15: Rating of certain attitudes % (agree or disagree)

A) Public Administrations should strengthen mechanisms for consulting and involving young people in decision-making at local level and economy. B) Public Administrations, by taking more into account opinions of young people in the policy/law making process, will contribute to regional cooperation. C) Regional initiatives on youth cooperation make you feel more optimistic about the future.

All respondents, N=6000, share of total, % of agreement or disagreement)



On the role of public administration in enhancing youth engagement in on local and economy levels, results indicate a vast majority of respondents who agree that public administration is a major actor. At regional level, some 92% agree that public administration should strengthen its mechanisms to involve youth in decision-making, as opposed to 8%. Serbia with 94% is the strongest proponent of the role of public administration in involving youth in decision making process, while the Republic of North Macedonia is at the other end of the scale with 90%.

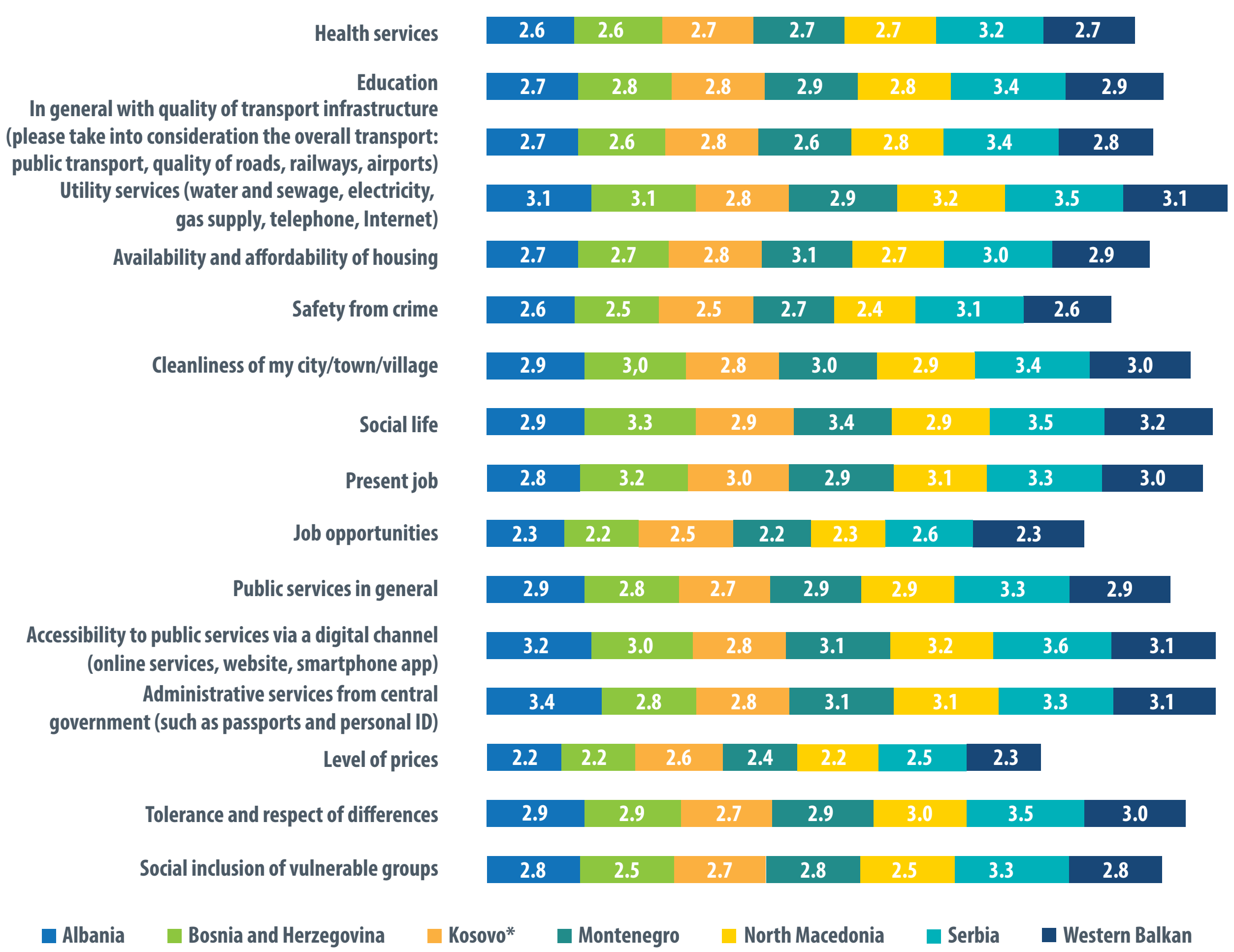
Likewise, the predominant rate of respondents agree that public administration should take more into account opinions of young people in law making process (87%), while on the opposite end stand 13% of those who disagree. Albania (91%) is home to the highest number of respondents who agree that youth should be more involved in law-making processes.

In addition, 84% of Western Balkans residents claim that the regional initiatives on youth cooperation make them feel more optimistic, while 16% disagree. At economy level, all economies have similar overview of the role the public administration and regional initiatives in youth empowerment, with a fluctuation by 4-5 points. Albania is the most forceful cheerleader in this regard with 88%, while Montenegro stands at the other end.

Overall, it can be implied that citizens expect a more comprehensive engagement of public administration in creating opportunities for young people to engage in decision making processes.

Figure 16: Could you please tell me how satisfied are you with each of the following in your place of living?

(All respondents, N=6000, share of total, %) scale from 1 to 5, share of total, %)



In terms of specific sectors of the economy, data show interesting results. Regarding health services, all economies have expressed an above average satisfaction level, recording 2.7 points in a 5-point scale. Once more, Serbia is the economy with the most satisfied citizens in terms of medical services, at 3.2 points. Economies like Montenegro, the Republic of North Macedonia and Kosovo* follow with a median rate of satisfaction of 2.7 points, while Albania and Bosnia and Herzegovina stand 0.1 points behind the aforementioned economies, showing a satisfaction rate of 2.6 points.

On the other hand, the overall satisfaction with education has relatively declined compared to last year. At regional level, the rate of citizens who are satisfied with the education system is at 2.9 points. Serbia once again leads the list of happy residents, thus widening the gap of respondents' satisfaction with neighbouring economies, as the level of happy respondents in Serbia reaches 3.4 points, while economies like the Republic of North Macedonia, Bosnia and Herzegovina and Kosovo* record 2.8 points. Montenegro scores 2.9 points, while Albania remains the only economy with 2.7 points in public sentiment regarding the education system.

The overall satisfaction with the quality of infrastructure and affordability of houses remains stable, at a regional average of 2.8 and 2.6 points, respectively. Results reveal an increasing trend of respondents who claim to be satisfied with their social life and current jobs, with overall satisfaction level of 3.2 and 3.0 respectively.

Also, the proportion of people satisfied with the price level has relatively spiked, although it has not yet exceeded the average level of satisfaction per se. On the other hand, the number of residents who are happy with job opportunities in their economies has declined even further, recording only 2.3 points. As mentioned in the previous results, unemployment in general remains a regional concern and should be taken seriously into consideration by public authorities.

Satisfaction with utility services has also dropped (to 3.1 points), though it remains at a relatively high rate. A similar concern is noticed in terms of social inclusion of the vulnerable groups, having experienced a decline on the residents' satisfaction level, reaching 2.8 points.

In general, public and administrative services enjoy relatively high levels of satisfaction and have not experienced any significant fluctuation compared to the previous cycle. On the other hand, citizens are concerned about their safety from crime (at 2.6 points), which leaves to imply that the public authorities should pay more attention to the safety of citizens.

In individual notes, much if not all of the credits for a great socio-economic performance goes to Serbia, which has become home of the most satisfied respondents in all of the abovementioned categories. It is noteworthy that the discrepancy in satisfied residents between Serbia and other Western Balkan economies not only stands in relatively high levels, but also shows a continuous trend of incremental disparity.

Government investment is seen as a necessary tool for growth, as clearly shown from the results of this round of the Barometer. At the regional level, a notable increase in public awareness of the importance of investment in sectors substantial for the economy is recorded. Across the region, there has been a sharp rise in the number of residents who think that each specific spectrum requires government's attention as a priority for investment. Social infrastructure (such as schools, hospitals etc.) is considered a priority for the vast majority of the population, reaching 46%. This sector is followed by agriculture, education and culture, SMEs and investment in transport infrastructure.

At the economy level, all Western Balkan economies hold a similar stance, though with small disparities on what citizens consider a 'prioritised sector' for investment. Citizens of all economies consider that social infrastructure requires the immediate resources of the government, while agriculture is considered a key sector for development and investment in Serbia (55%), Montenegro and Albania (47%) and Bosnia and Herzegovina (41%). Residents of Republic of North Macedonia and Kosovo* (both 54%) claim that social infrastructure needs more investment by the government. Economies such as Albania, which heavily depend on tourism, prioritise this sector as requiring government resources for investments, thus making up 52% of their total population's response. Montenegrins (44%), consider tourism as the second most important sector for investment, since alongside Albania, Montenegro is one of the top destinations for tourism by regional and international tourists.

Figure 17: In your opinion, in which of the following areas should your government invest its resources as a priority?

(All respondents, N=6000, share of total, %) scale from 1 to 5, share of total, %)

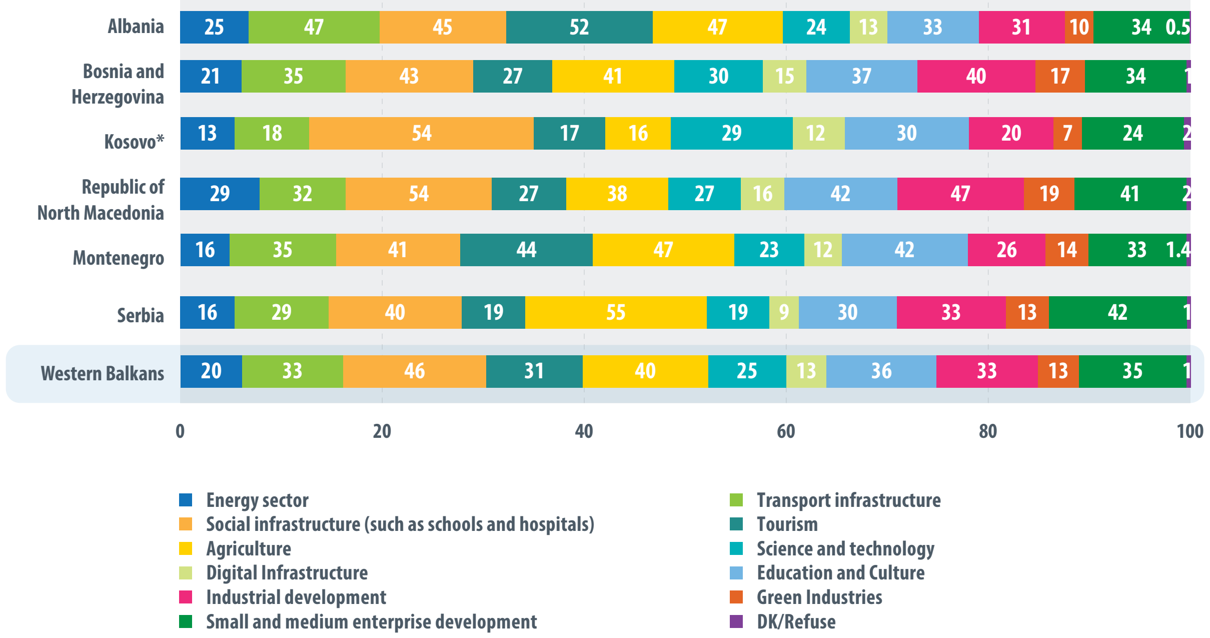
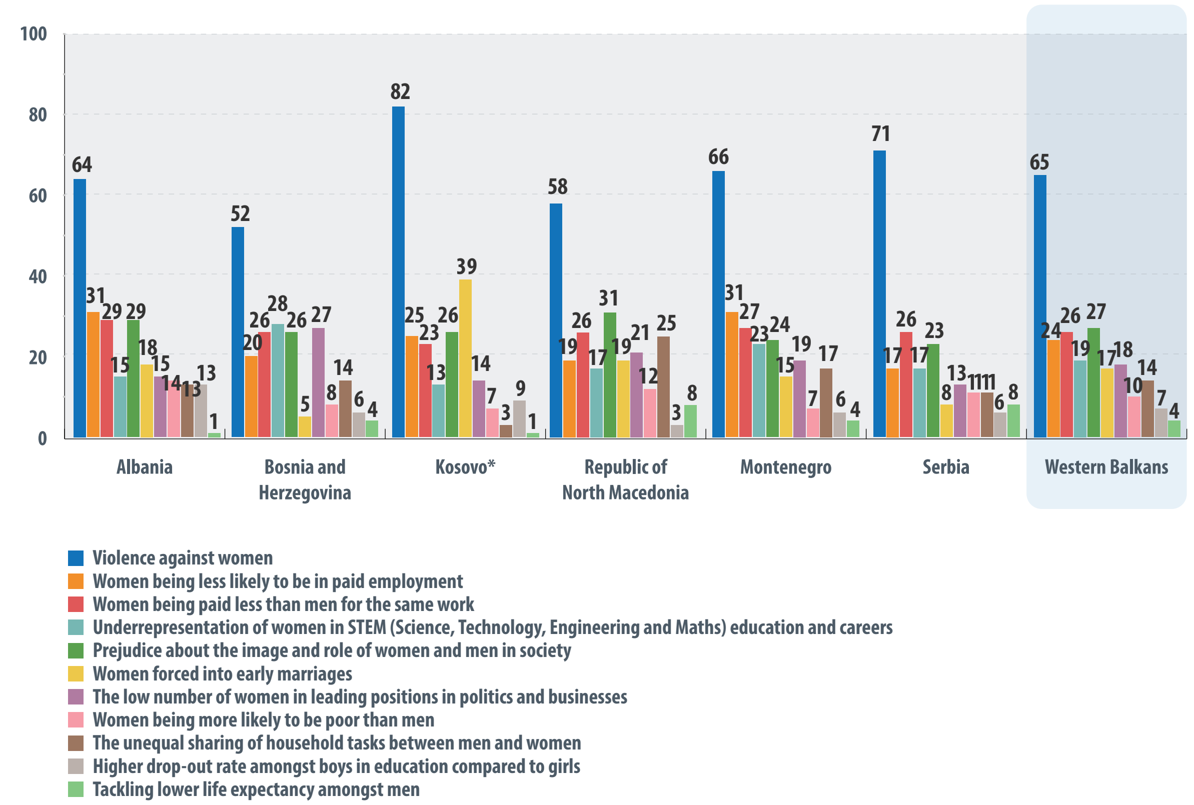


Figure 18: In your opinion, which area should be dealt with most urgently in your economy?

(All respondents, N=6000, share of total, %) scale from 1 to 5, share of total, %)



Violence against women is consecutively considered the most flagged issue by the region's respondents, scoring an 8-point rise (65% from 57% in 2019). Prejudice about gender roles in society is again the second most prevalent concern, reaching 27% (albeit 2 points down since 2019), while inequality in remuneration between men and women ranks third, with 26% (3 points up since 2019).

Kosovo* not only leads the region with the highest percentage of respondents concerned over gender-based violence (82%), but it also recorded the highest percentage of gender-based violence as the most persistent inequality since the inception of Barometer. According to the Mediterranean Women Mediators Network, the COVID-19 pandemic, more specifically the lockdown which came as a result of the situation with Covid-19, has increased incidences of domestic violence against women in Kosovo*.[4] This can explain the 35-point bounce in Kosovo's* attitude towards domestic violence since 2019, which []requires immediate attention and urgent intervention of the government.

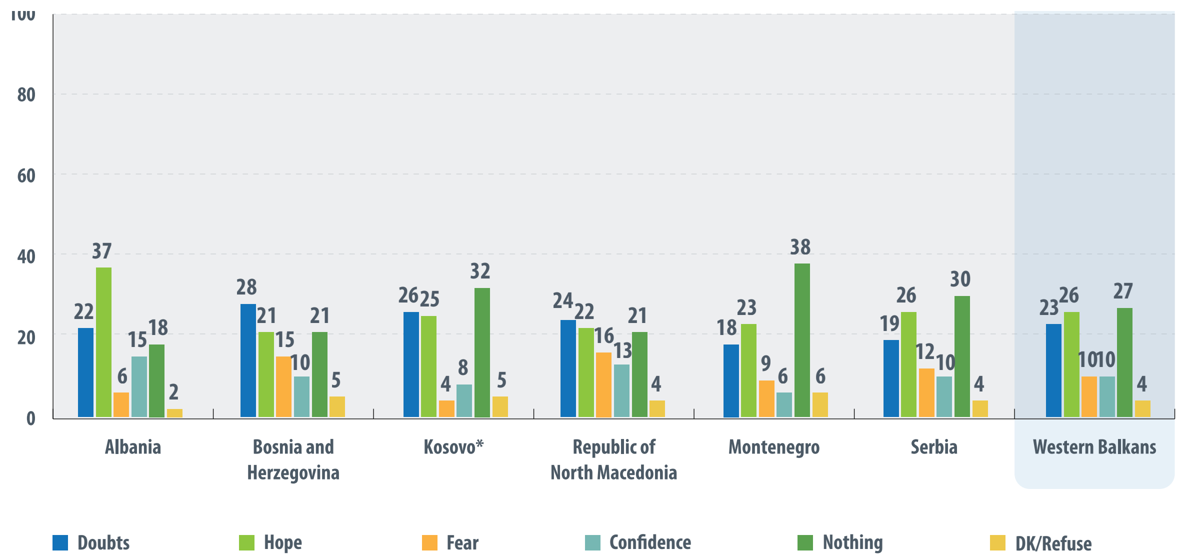
In the meantime, 18% of Western Balkans respondents flag the low representation of women in leading positions in politics and businesses, and 14% address the unequal sharing of household tasks based on gender. One-seventh of respondents in the Western Balkans still perceive forced marriage as a concern that should be dealt with urgently, while less than one-tenth are concerned over the heightened likelihood of poverty for women and lower life expectancy for men.

Results paint a gloomy picture of the citizens' relation to the region. While last year 39% associated positive feelings with the region, the percentage of citizens sharing the same attitude in 2020 has contracted to 36%. On the other hand, 33% have an instinctively negative reaction to it (compared to 35% in 2019). Meanwhile, more than one-fourth harbour no feelings for the Western Balkans, one way or another.

Looking at the individual economies, Albania remains the most hopeful (37%) and confident (15%) economy, while Montenegro is the most detached one (38%). Bosnia and Herzegovina, meanwhile, is the region's most apprehensive economy, with the greatest concentration of respondents harbouring doubts (28%) about the Western Balkans.

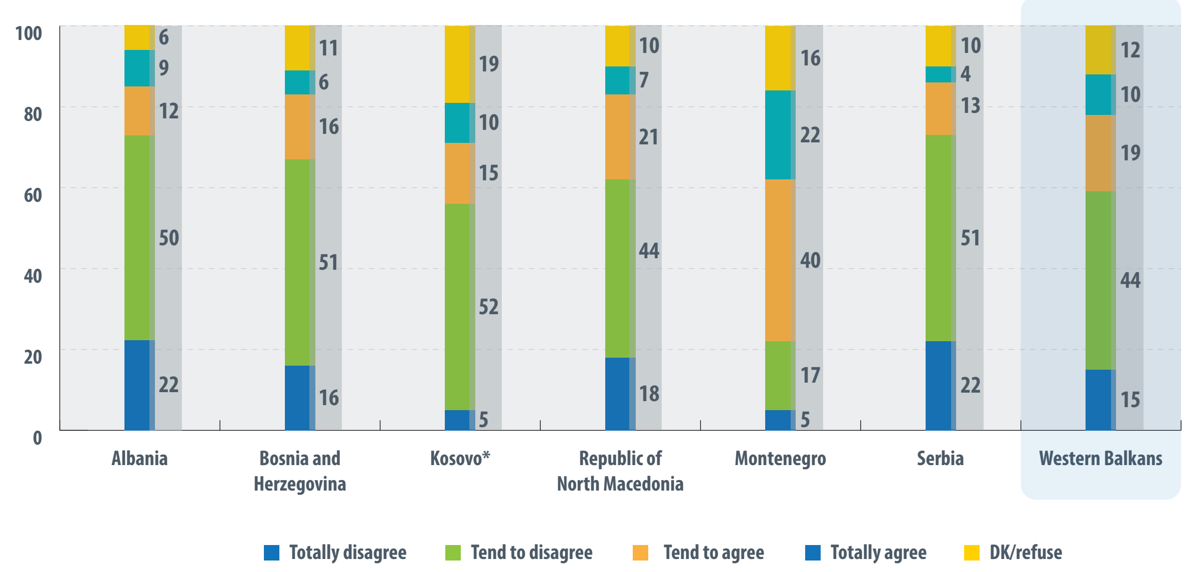
Figure 19: When you think of the Western Balkans, what feeling first comes to mind?

(All respondents, N=6000, share of total, %) scale from 1 to 5, share of total, %)



[4] Mediterranean Women Mediators Network, (2020): COVID-19 and Domestic Violence against Women, available at: https://womenmediators.net/wp-content/uploads/2020/08/mwmn_report_10.pdf

Figure 20: To what extent do you agree or disagree with the following statement: What brings Western Balkans citizens together is more important than what separates them?



An underlying sentiment of solidarity pervades the Western Balkans, with close to two-thirds (59%) of respondents focusing on what brings the region together rather than drives it apart, though this sentiment has subtracted by 6%. This indicates two important things: a sense of shared belonging, at least as far as a considerable majority of the region's residents is concerned, and a decreasing trend at regional and economy levels.

Bosnia and Herzegovina is the region's most forceful cheerleader, with 67% eager to highlight ties that bind the Western Balkans; interestingly enough, Montenegro being a number one proponent of Western Balkans in 2019, now has roughly two-thirds of its respondents (62%) who disagree with this positive sentiment. The number of Kosovo* respondents who expressed no interest in answering this question has reached 19%, thus indicating a detachment in this regard.

PERCEPTIONS OF SECURITY

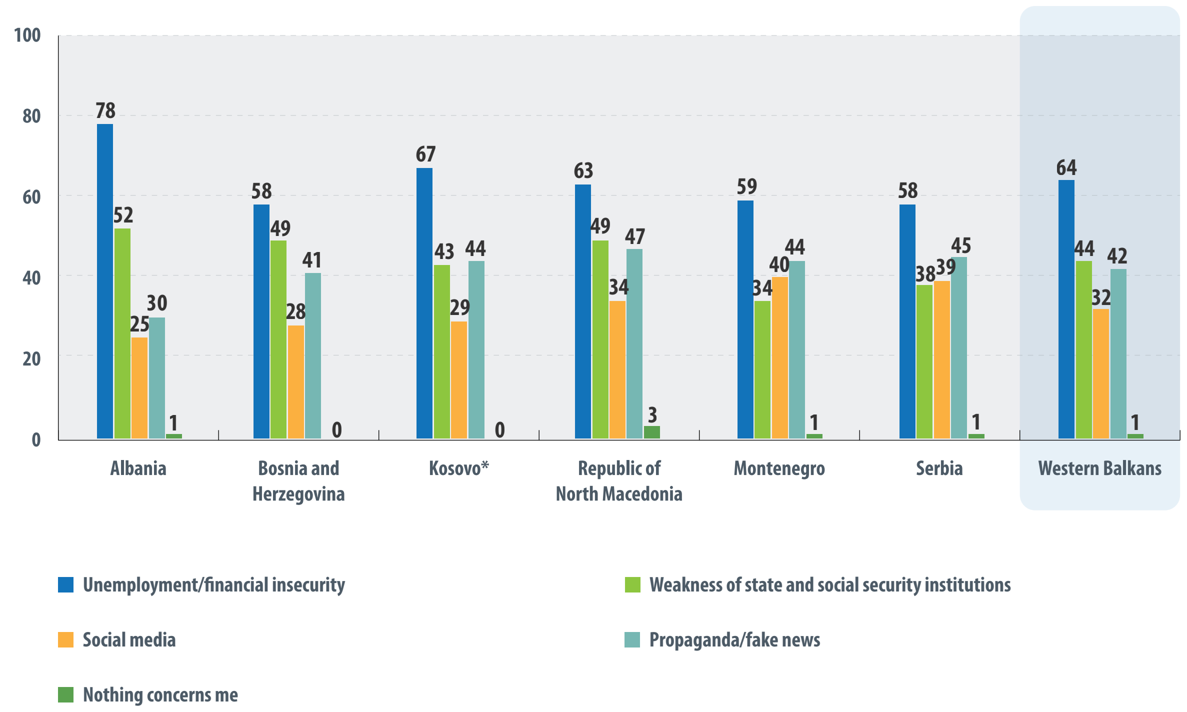
The Balkan Public Sentiment Index (BPSI) initially creThere has been a significant shift in perceptions of security at regional level since 2019, thus capturing a biased attitude; respondents who do not feel threatened in their neighbourhoods are slowly reaching the number of their counterparts. At the regional level, roughly a half of respondents claim they do not feel threatened at all, and the other 50% feel insecure. Bosnia and Herzegovina is the region's most insecure economy when it comes to the respondents' assessment of the situation for illegal possession and use of weapons, with 64% feeling threatened, as figure 22 shows. The fact that residents who effectively feel unsafe twice outnumber those that do feel safe in this economy is alarming and calls for action.

Meanwhile, unemployment is clearly perceived as the most serious and present danger across the region, with 64% of respondents signalling fear of this channel for potential radicalisation.

Unemployment/financial insecurity is clearly perceived as the most serious and present danger across the region, with 64% of respondents signalling fear of this channel for potential radicalisation. Financial insecurity is the top common concern for the six Western Balkan economies, with the vast majority of residents in Albania (78%) feeling most threatened by radicalisation because of financial instability, followed by Kosovo*, with 67%, and the Republic of North Macedonia, with 63%.

Figure 21: Which factors do you think contribute the most to radicalisation and violent extremism in your economy today?

(All respondents, N=6000, share of total, %) scale from 1 to 5, share of total, %)



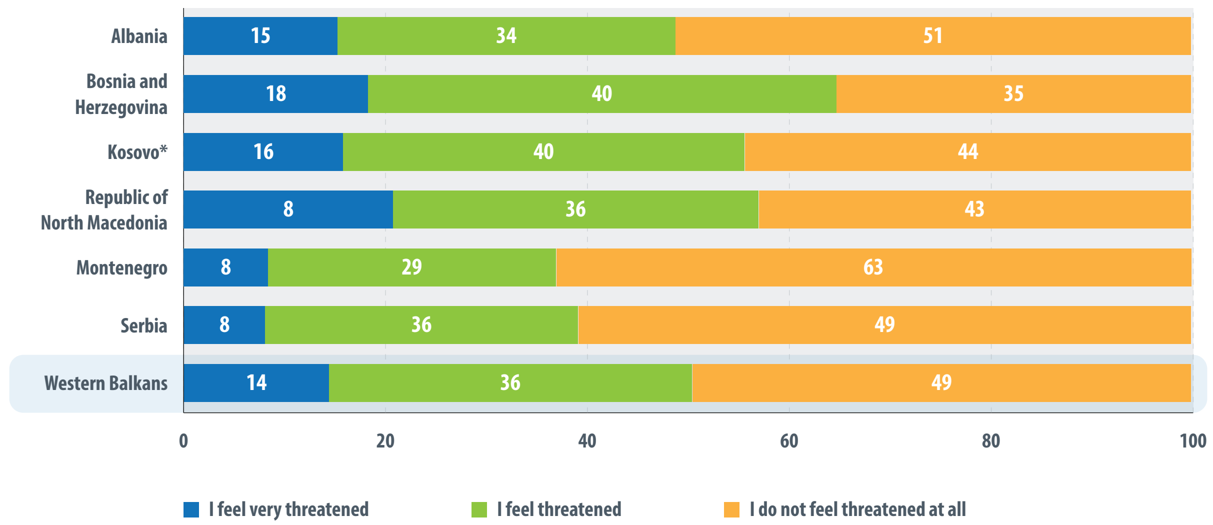
Furthermore, 44% call for action, challenging the governments to come up with clear measures to stem radicalisation, since according to them the weakness of state and social security institutions contributes the most to violent extremism. On the other hand, nearly half of respondents in the Republic of North Macedonia (47%), Serbia (45%) and Kosovo* (44%) feel that spreading fake news and propaganda is a possible channel for radicalisation.

There has been a notable change in perceptions of illegal possession and misuse of weapons. At the regional level, the perception of respondents who claim that they do not feel threatened at all, is almost equal to those in who feel insecure (50%).

Specifically, almost two-thirds of the population in Montenegro and Serbia are satisfied with the security situation in their neighbourhoods (63% and 61%, respectively), making them the region's runaway leaders in this category. Meanwhile, Bosnia and Herzegovina (64%) is the region's most insecure economy when it comes to respondents' assessment of the situation. The fact that residents who effectively feel unsafe twice outnumber those that do should be seen as an urgent call to action for its government. The Republic of North Macedonia (57%) and Kosovo* (56%) also feel threatened by the illegal use of weapons, indicating a worrisome trend for public safety and security, while Albania reflects an ambivalent attitude on safety, with 51% of respondents not feeling threatened at all by the misuse of weapons, and 49% seeing illegal weapon possession as a great threat to their safety.

Figure 22: How threatened do you feel by illegal possession and misuse of weapons in your neighbourhood (as in crime, domestic violence, celebratory shooting, etc.)

(All respondents, N=6000, share of total, %) scale from 1 to 5, share of total, %)



ATTITUDES ON REGIONAL COOPERATION AND EU

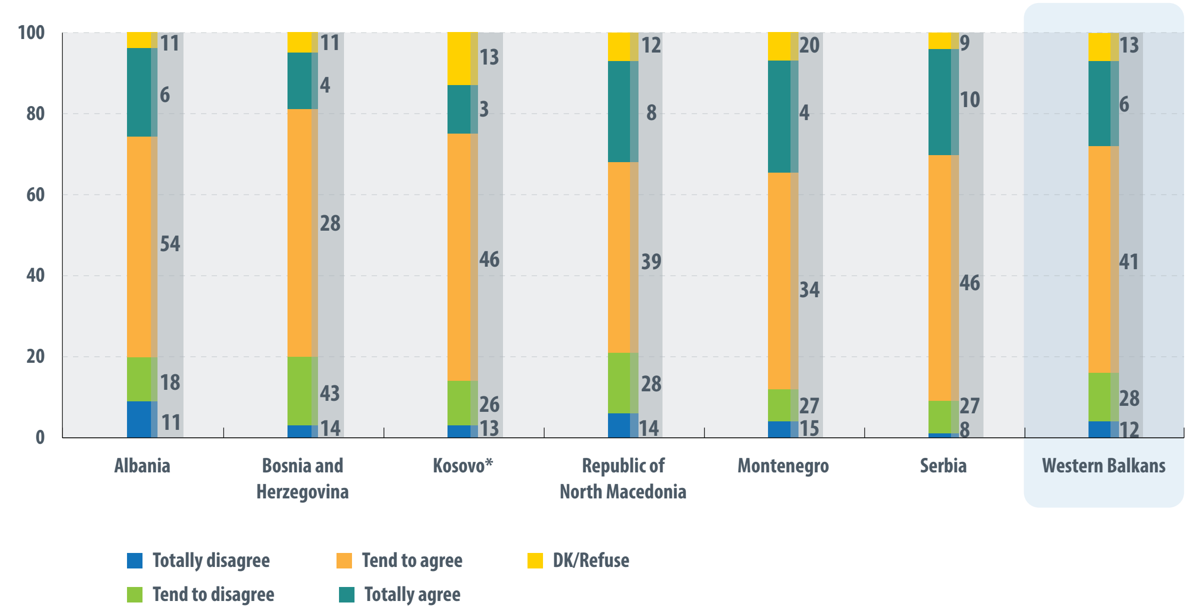
Overall, regional cooperation remains prominent with an overwhelming majority of respondents supportive of its role in improving the political, economic and security situation in their home economies (77%, same as in 2019). The number of those sceptical of regional cooperation has also fallen significantly, reaching 16%, as figure 24 shows. There has been a positive rise in the appraisal of regional relations, with close to half of the respondents (47%) observing improvements in regional relations in the past 12 months.

The EU accession is continuously seen as a positive development. A subtle increase in support for EU membership across the region is noted, with 62% endorsing accession (up from 59% in 2019 and 56% in 2018). On the other hand, every year the expectations of Western Balkans for EU integration dissipate notably, with only one-fourth remaining optimistic of EU accession by 2025. This is again indicative of a more realistic outlook on the region's accession prospects.

There is a positive rise in the appraisal of regional relations, with 47% of participants observing improvement, while those that can testify to negative changes in intra-regional relations amount to 40% - 5 percentage points less than the last year. This positive change may be induced by the momentum of faith solidarity and shared commitment created in the Western Balkans during the COVID-19 outbreak, with green corridors initiative being the best example. After last year's relative negative rating regarding regional relations, an encouraging increase in the positive assessment of respondents has been registered this year.

Figure 23: Do you agree that the relations in the Western Balkans are better than 12 months ago?

(All respondents, N=6000, share of total, %) scale from 1 to 5, share of total, %)



In terms of how individual economies view regional developments, Serbia has taken a bounce from one extreme to another; from the region's leading critic of regional developments in 2019 to one of the most forceful cheerleader of the region's current relations, thus making 56% of the population who share a positive attitude. Albania is the most supportive of regional relations in the past 12 months with 60%.

The least positive perception of regional relations is coming from Bosnia and Herzegovina 57%, followed by Republic of North Macedonia and Montenegro – 42% both.

Importance of regional cooperation in improving the political, economic and security situation in the Western Balkan economies continues to be overwhelmingly supported by the majority of respondents (77%, same as in 2019).

The number of respondents sceptical of regional cooperation has fallen to 16% across all of the participating economies, down by four points since 2019.

Positive responses in Serbia top the rankings, with 86% of them supportive of the role played by regional cooperation, followed by Montenegro (with 82%) and Albania (with 77%). At the other end, with 72% and 73% positive responses, Republic of North Macedonia and Kosovo* have the least confidence in the constructive power of regional cooperation.

After several years of the region's almost equal divide between optimistic and pessimistic respondents concerning regional cooperation, results have flipped in favour of the positive contingent. The Republic of North Macedonia, Albania and Bosnia and Herzegovina are home to the highest concentration of residents who don't believe that regional cooperation can positively contribute to the socio-economic situation, making up one-fifth of their entire populations.

Figure 24: Do you agree that regional cooperation can contribute to better political, economic or security situation of your economy?

(All respondents, N=6000, share of total, %) scale from 1 to 5, share of total, %)

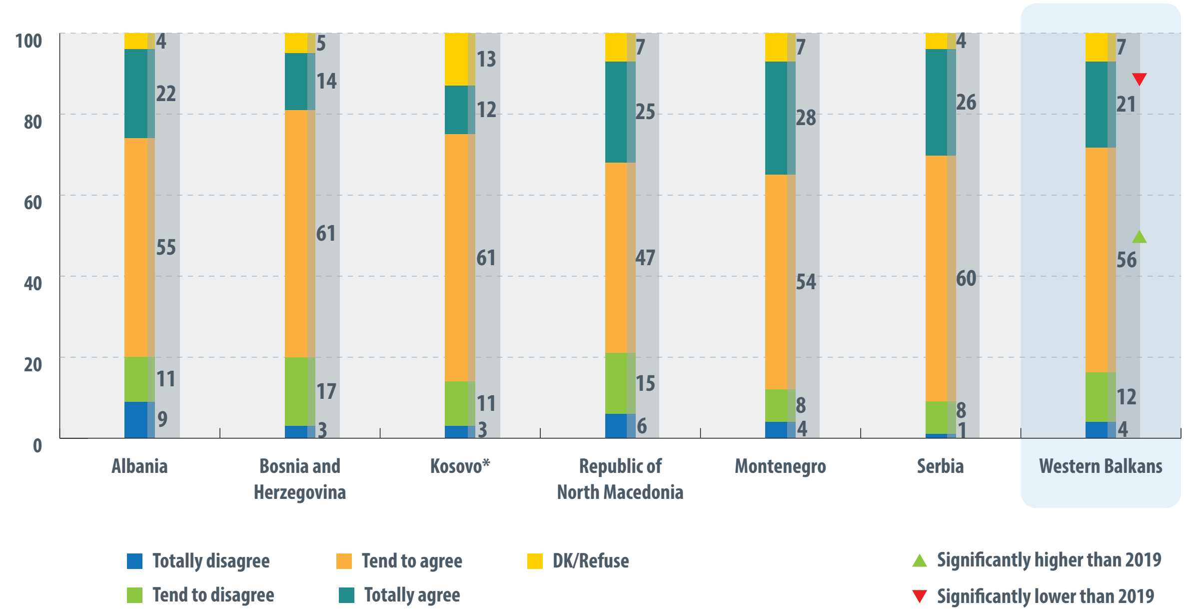
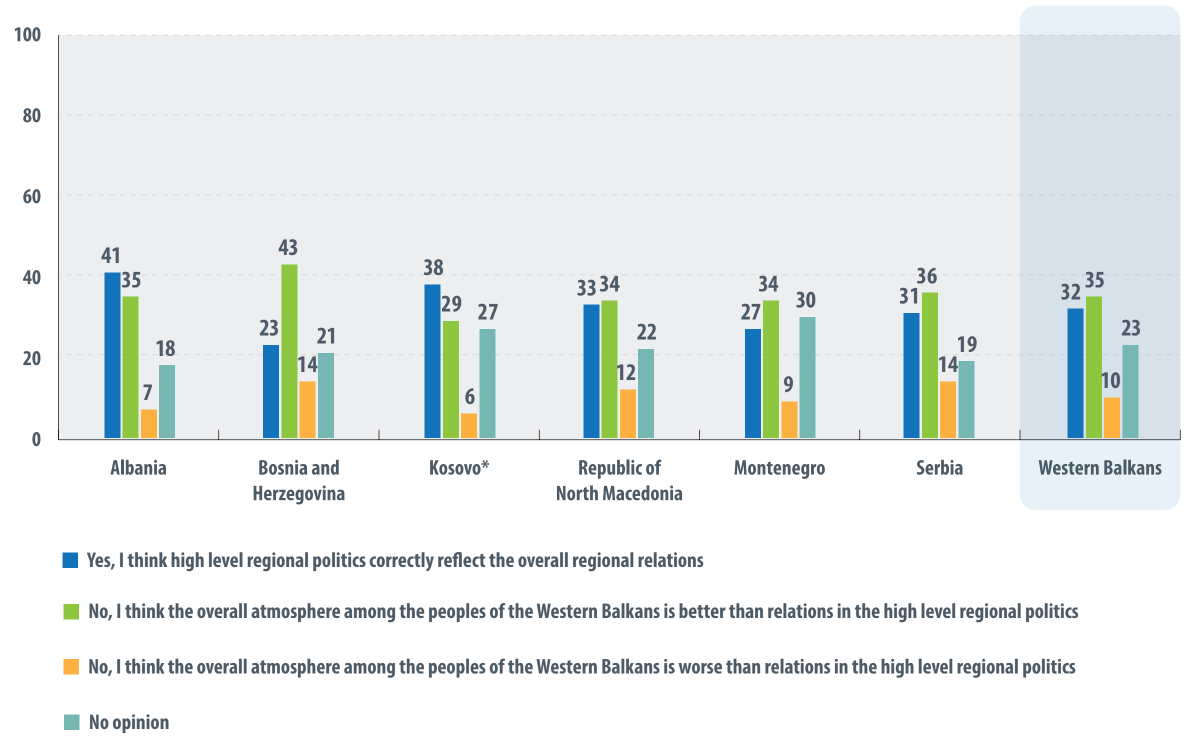


Figure 25: Do you think that intra-regional political relations correctly reflect the overall atmosphere among the peoples of the Western Balkans?

(All respondents, N=6000, share of total, %) scale from 1 to 5, share of total, %)



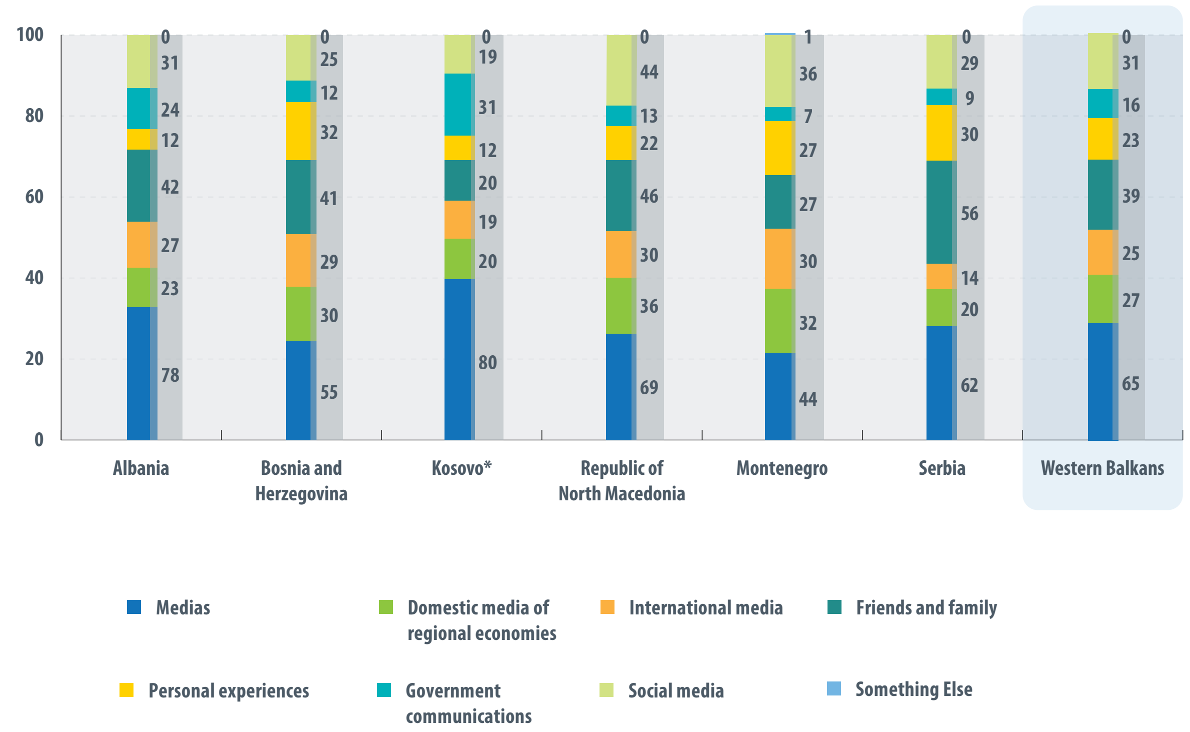
In a region with complex relations between and among economies, the high-level political relations do not necessarily mirror public sentiment regarding the relations among the peoples of the Western Balkans." It thus appears that a greater number of respondents – over one-third (35%) – have a more positive outlook when it comes to regional relations among peoples than that demonstrated at the level of high politics. Following closely behind, at 32% stand those who find that high-level politics reflects exactly the relations among peoples. On the other hand, only 10% believe that relations among peoples are actually worse than at high level. In general, it may therefore be noted that Western Balkans respondents largely view their relations either more positively than or similar to the bilateral or regional political relations. Strikingly, roughly one-fourth of respondents do not have a specific opinion on this issue.

Individually, Bosnia and Herzegovina registers a more distinguished optimism about the regional situation compared to other economies, with 43% of residents claiming that the situation in reality is much more positive than presented by the regional politics. Meanwhile, 41% of Albania's respondents feel that regional politics correctly reflects regional affairs.

Results illustrate two very interesting facts: two neighbouring economies, Kosovo* and Serbia, have taken different positions regarding the current regional situation and its representation by the politics. While the largest percentage of residents who think that the overall atmosphere in the region is worse than reflected by regional politics come from Serbia (14%), most of respondents who did not have an opinion about this issue are from Kosovo* (27%).

Figure 26: What are the key sources of information which shape your opinion on the rest of the Western Balkans region (multiple answers)?

(All respondents, N=6000, share of total, %) scale from 1 to 5, share of total, %)

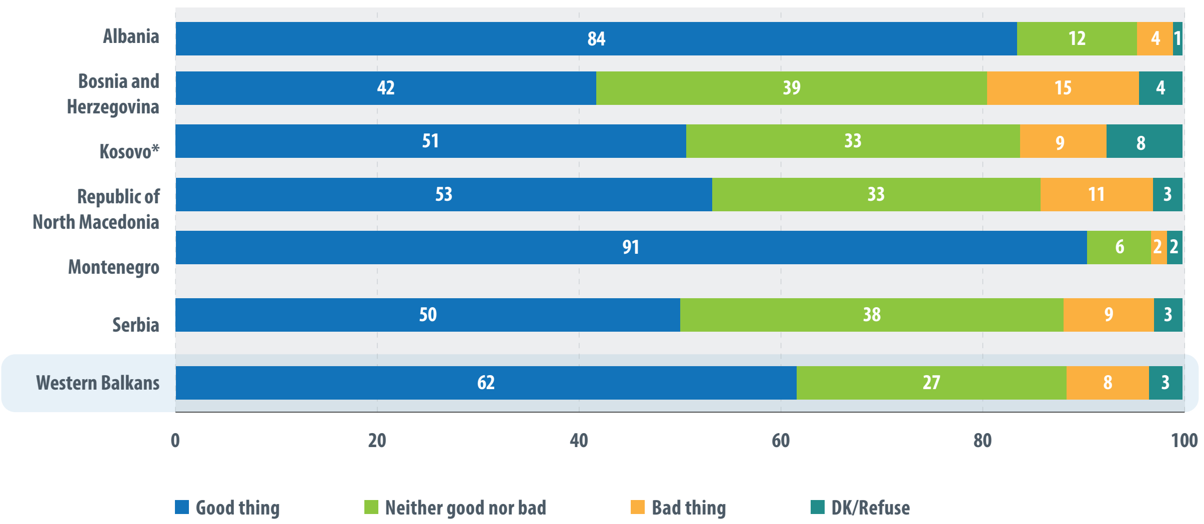


While information is an important tool which helps in shaping opinions, the source of information plays a major role in how that information is interpreted. In the Western Balkan economies, there is a similar attitude towards accessing information, with an above-average level of residents acquiring information through local media. More specifically, some 65% of the entire population uses media as a channel for creating an opinion, while a total of 39% shape their opinion based on information through friends and family. Interestingly enough, social media and personal experience represent another two channels which are widely used by participants (31% and 23% respectively), while only 16% claim to take a certain attitude only if they are informed by governmental communications.

In terms of individual economies, a vast majority of Kosovo*'s residents shape their opinion on the region via local media (80%), while 31% chose government communications as a more accountable information tool. On the other side of the coin stands Montenegro, with 44% of respondents using local media as a source, while roughly one-third get informed through social or international media. Serbia also provides an interesting case: while 62% of its population creates impressions about the region through local media, the word of mouth is most commonly used, with 56% of respondents stating that they mostly shape their opinions on the region based on those of their family or friends. A similar phenomenon is valid for economies like Albania, Bosnia and Herzegovina and Republic of North Macedonia, which consider friends and family a reliable source that shapes their perceptions of the other regional economies.

Figure 27: Do you think that EU membership would be a good thing, a bad thing, or neither good nor bad for your economy?

(All respondents, N=6000, share of total, %) scale from 1 to 5, share of total, %)

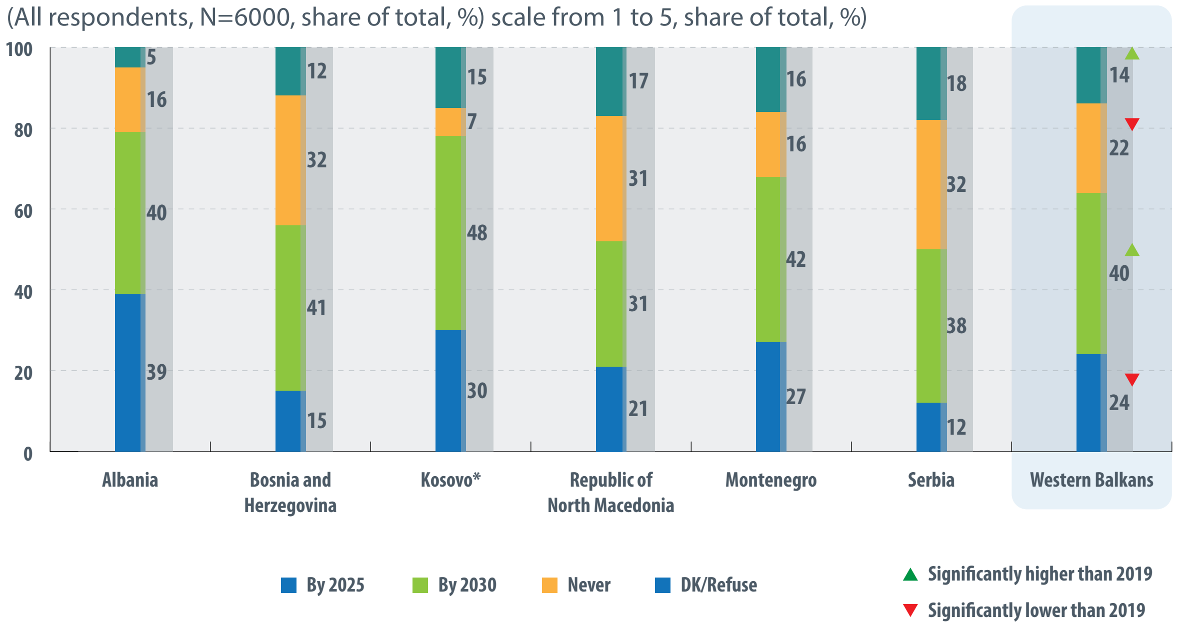


A subtle increase in support for the EU membership is visible across the region, with 62% endorsing accession (up from 59% in 2019 and 56% in 2018). At the same time, the number of negative responses has decreased, albeit by three points (8% from 11% in 2019), the lowest ever recorded percentage for this category since the Barometer's inception. The number of neutrals, on the other hand, has spiked to 27%.

Serbia remains the only economy where the EU accession is supported by less than half of respondents, though the number of respondents who criticise it is three times lower (42% and 15%, respectively). Kosovo* and Albania are once more the EU's biggest cheerleaders in the region, with 91% and 84%, respectively, viewing membership as a positive development. On the other hand, nearly 33% of respondents in the Republic of North Macedonia and 39% in Serbia are neutral towards the EU accession, while Bosnia and Herzegovina records a 6-points drop in support for the EU membership.

Figure 28: In general, when do you expect the accession of your economy to the EU to happen?

(All respondents, N=6000, share of total, %) scale from 1 to 5, share of total, %)



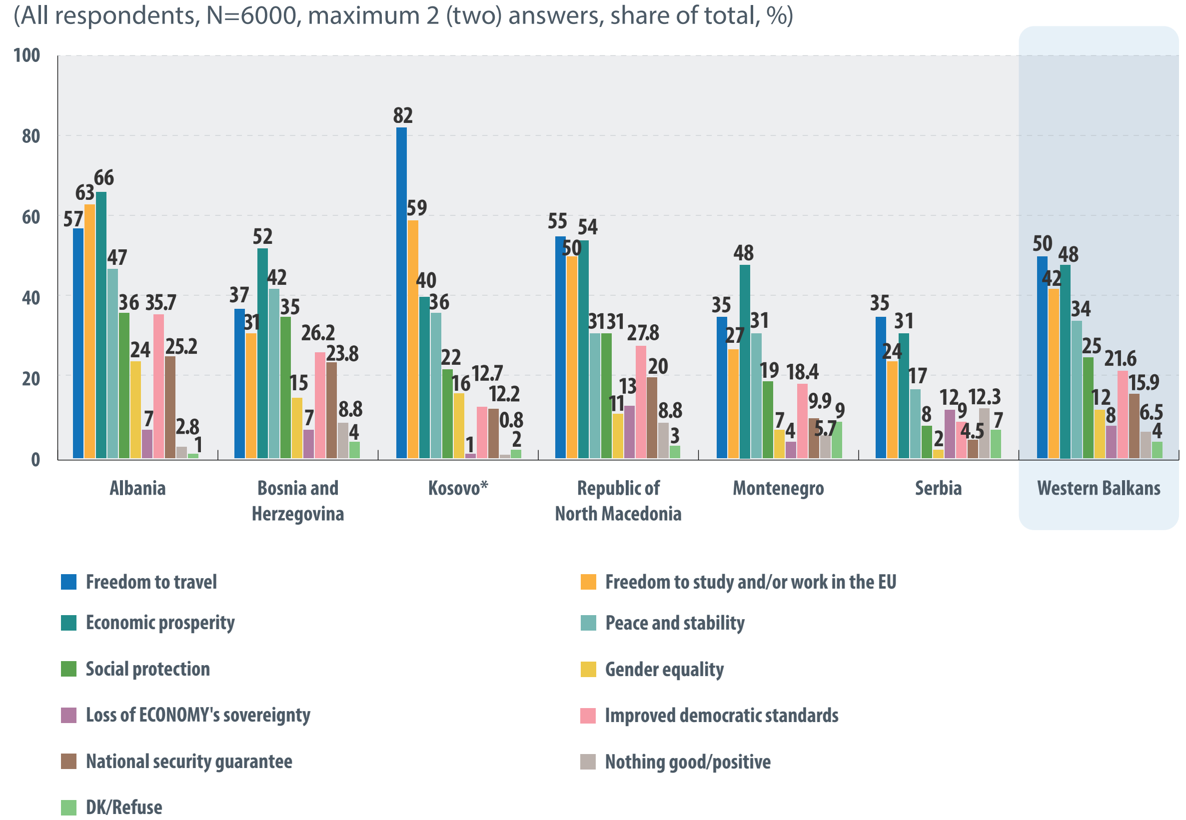
The number of respondents that expect the EU integration of their economies to occur by 2025 has dropped to 24% (from 28% in 2019). This is again indicative of a more realistic outlook on the region's accession prospects. Albania, which suffered from a bout of EU scepticism last year – with nearly half of the population (40%) anticipating EU integration no sooner than 2030 – has not only decreased its scepticism by 4 points, but it has also marked an 11-point spike in residents who feel optimistic about Albania's accession to the EU by 2025 at the latest. This optimistic outlook comes as a result of Albania receiving the green light from the Council to open the EU accession negotiations together with Republic of North Macedonia. However, the same positive outlook does not exist in the other EU candidate economies, since the share of residents expecting their economy to join the EU by 2025 has decreased significantly. Their expectations are that their economy's membership in the EU will be finalised by 2030 at the latest.

The group of respondents who feel that accession may never happen also comprises a larger number of participants each year; up to a fifth of the population actually believe that their economy will never integrate in the EU. Interestingly enough, one of the two economies which has not yet been granted the status of official candidate for EU membership, Kosovo*, is the region's biggest optimist, where the respondents expecting accession by 2025 account for almost one third of the population (30%).

In addition, Kosovo* records higher marks of longer-term optimism compared to Republic of North Macedonia, Montenegro and Serbia, which in contrast to Kosovo*, have officially opened, or received the green light for EU accession negotiations with the EU. Kosovo* boasts about the highest proportion of optimistic respondents, with 48% hopeful of accession by 2030. At the other end of the scale are Serbia, Bosnia and Herzegovina and the Republic of North Macedonia, with the number of respondents who feel accession may never happen reaching one-third of their entire populations.

Figure 29: What would EU membership mean to you personally?

(All respondents, N=6000, maximum 2 (two) answers, share of total, %)



Results of this cycle of Barometer show an ambivalent picture regarding citizens' association with the EU membership. Though economic prosperity remains one of the two most important associations with the EU, freedom to travel has experienced an incremental trend, making up 50% of the region's population. The freedom to study and work in the EU, however, has dropped by one position, thus ranking third and comprising 42% of respondents who see it as a key benefit of the EU accession. This is illustrative of an overall regional trend of outward migration that appears to be growing, with whatever efforts invested by the region's governments to arrest "brain drain" apparently having little effect.

Peace and stability (34%) are the fourth ranked benefits, as perceived by the region's respondent population. The number of respondents who perceive EU integration as a threat to their economy's sovereignty remains at the same position as last year, while the number of those failing to see anything positive arising from membership is down to 6%.

Kosovo* leads with 82% when it comes to prioritising freedom to travel as a product of the EU accession. With Kosovo* being the only economy in the Western Balkans that lacks visa liberalisation for its residents, visa liberalisation is closely correlated to the EU integration process and vice-versa. On the other hand, Albania (66%) and Bosnia and Herzegovina (52%) lead when it comes to prioritising economic prosperity as a product of EU accession. Once again, Albania and Kosovo* are most interested in the ability to study and work abroad (63% and 59%, respectively). Gender equality does not represent any significant product of the EU accession, since only 12% of the Western Balkans associate their economy's accession to the EU with women's empowerment.

UNEMPLOYMENT AND RISK OF POVERTY

The vast majority of residents in the Western Balkans describe their socio-economic status as average (77%), marking a six-point increase compared to last year, while the number of respondents who claim that their standard of living is above average remains on the same level. This indicates that after several years of relative stagnation in perceptions of socio-economic status, improvements in the overall economic situation seem to be finally translating into some tangible benefits for households across the region. Interestingly, this perception seems to diverge somewhat from the findings of the socio-economic status where the number of below-average respondents is decreasing, with the rank of the so-called middle class swelling accordingly. Some economies, however, record an increment of residents whose life standard is below average, while the number of those who live above average has increased. This indicates an interesting trend which shows a deeper margin between citizens with below average and above-average socio –economic status, thus indicating a less equal society.

The top two ranked obstacles to employment are the lack of adequate jobs, which now leads the list with 38%, and "not knowing the right people" with 28%. The perceived levels of nepotism in hiring remain a great cause for concern and indicate that trust in employers, whether private or public, is at a low and must be addressed in a structural manner by the region's economies. Inadequate education and lack of work experience are also considered as a barrier that is preventing residents from securing jobs.

Unemployment remains the number one reason for social exclusion, with roughly one-third of the population feeling excluded from the society because they can't find a job, while 31% feel excluded because of their age (31%). Individuals who cite their ethnic affiliation (19%) and the lack of their family support (26%) as barrier to inclusion have increased by two points and one point respectively in the whole region. Worryingly enough, the number of participants who reported dismissals of friends and relatives has incremented to 40%, while the number of co-workers laid off has increased by a minimum of one point (28% from 27% in 2019). Results imply a regional instability in the labour market, since for two consecutive years, the Barometer recorded a notable spike in the number of relatives and colleagues fired.

For employed participants, this instalment of the Barometer marked a distinguished swift from public employment to the private sector, with the private sector being the source of employment for three-fourths of the residents in the region. Following the shift from the safer public employment, job security has notably deteriorated at the regional level (-7). Specifically, economies that recorded the highest number of respondents working in the private sector also recorded a high level of insecurity in maintaining the same employment in the coming year.

Similar to previous cycles of the Barometer, an overwhelming majority of respondents describe their socio-economic status as average (77%), marking a 6-point increase compared to last year. The number of citizens who claim that their standard of living is above average remains at the same level, comprising 5% of the overall survey population. This indicates that after several years of relative stagnation in perceptions of socio-economic status, improvements in the overall economic situation seem to be finally translating into some tangible benefits for households across the region. Kosovo* and Bosnia and Herzegovina are again two economies with the highest concentration of citizens who consider to have an average socio-economic status (90% and 80%, respectively).

On the other side of the coin, compared to the 2019 edition, Kosovo* has recorded a significant deterioration in the socio-economic status of its citizens, with a 7-point decrease in the number of above-average households. Meanwhile, despite the large number of citizens who live at average level, roughly one-fourth of citizens in Serbia, as well as one-fifth of citizens in the Republic of North Macedonia and Albania identify their socio-economic status as below average. On the flip side, the number of above-average respondents in Albania has also grown by four points, reaching 8% of the total population. At economy level, this indicates an interesting trend which shows an increased margin between citizens with below average and above-average socio –economic status, thus indicating a less equal society.

Figure 30: (Social status: self-estimation) How would you estimate your current socio-economic status? Do you live

(All respondents, N=6000, share of total, %) scale from 1 to 5, share of total, %)

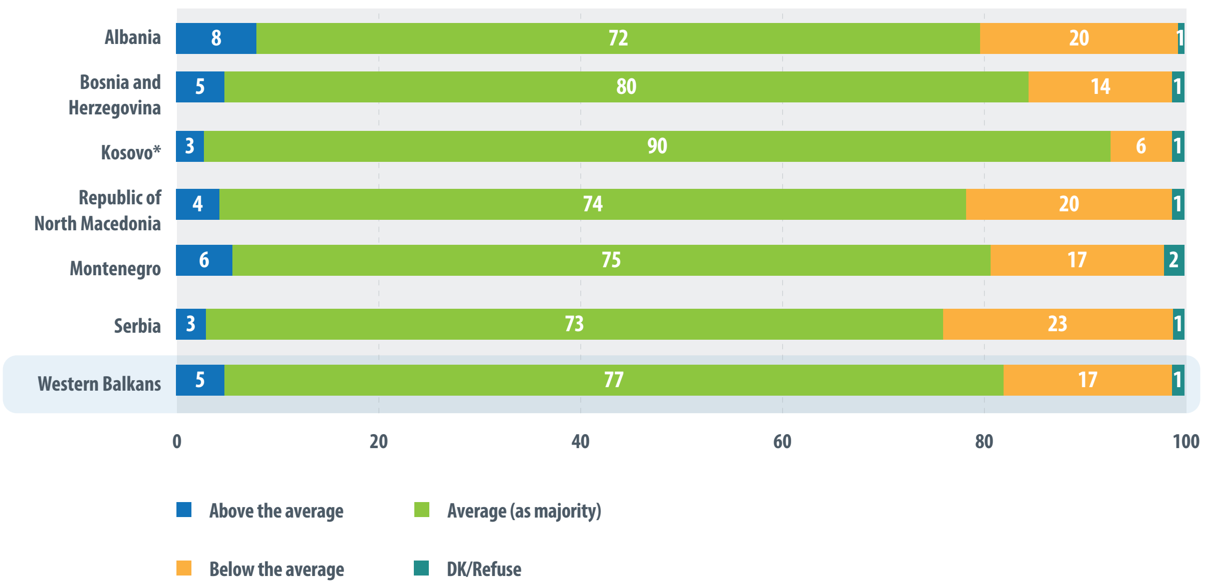
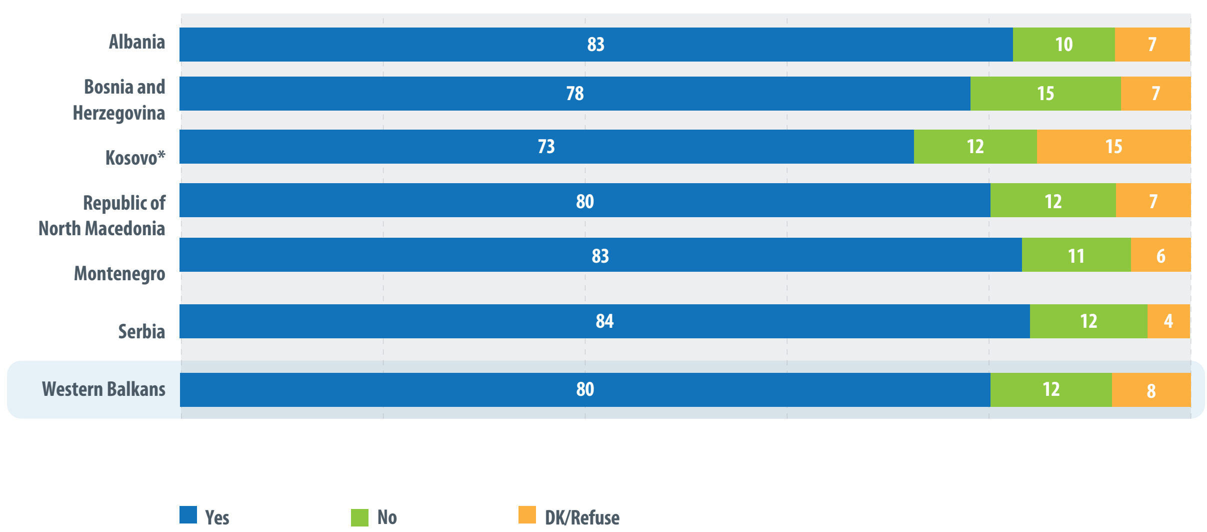


Figure 31: Do you think that the gap between the rich and the poor is increasing in your economy?

(All respondents, N=6000, share of total, %) scale from 1 to 5, share of total, %)



Interestingly, this perception seems to diverge somewhat from the findings of the socio-economic status where the number of below-average respondents is decreasing, while the rank of the so-called middle class is swelling accordingly. Despite a 2-point drop in the overall concern on the wealth gap, the share of respondents who express this issue as a growing trend remains on significantly high levels, scoring an overall rate of 80%.

Serbia (84%), Albania (83%) and Montenegro (83%) represent three economies with the greatest number of concerned citizens, with Montenegro experiencing a notable increase in the number of such respondents. On the other hand, despite the high number of Bosnia and Herzegovina's citizens who remain concerned over the wealth gap, this number has sharply dropped by 10 points. As in previous years, Kosovo* has the fewest respondents who worry about rising inequality in their economy (73%), though this percentage has spiked by five points since last year. The highest proportion of those who refused to answer this question is again from Kosovo*, reaching 15%.

For two consecutive years, employment numbers across the region have rebounded strongly. More than a half of the population currently work (58%, from 50% in 2019), while 14% of citizens claim to be unemployed. At the same time, the number of unemployed has dropped by 4 points, with the proportion of retired citizens in the surveyed population falling to 14%. All the region's economies have added significant numbers to their employment ranks, with the exception of Serbia; Kosovo* has marked a double record in this category: firstly, it represents the economy with the highest number of citizens who presently work (77%), and secondly, it has recorded an unprecedented positive upturn in the economic status of its citizens.

Albania has seen a 5-point increase in overall employment since the last survey (up to 58% from 53% in 2019), while the Republic of North Macedonia and Montenegro have added 3 and 7 points, respectively. On the other side of the coin, Serbia has marked a negative trend in its economic status, with a 5-point contraction in the number of employed citizens (53%, from 58% in 2019). Albania (19%), Montenegro (17%) and the Republic of North Macedonia (16%) are now home to the largest unemployed population, while Bosnia and Herzegovina boasts with the region's highest concentration of housewives (10%). Serbia has restored the epithet of the region's oldest economy, with one-fourth of its population retired. At the other end, Montenegro is home to region's youngest economy, with 13% share of students in the survey population.

Figure 32: What is your current working status?

(All respondents, N=6000, share of total, %) scale from 1 to 5, share of total, %)

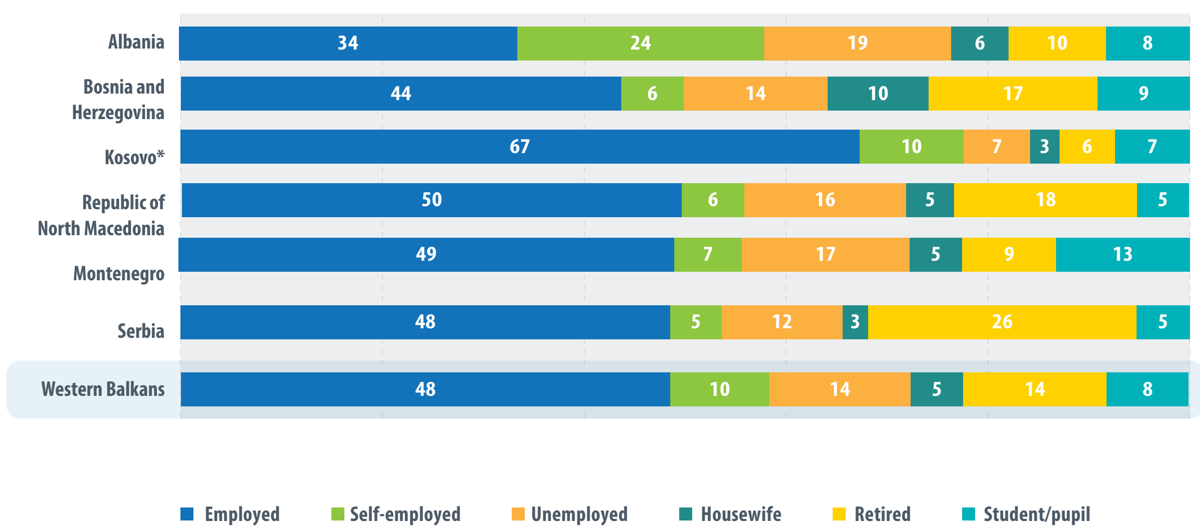
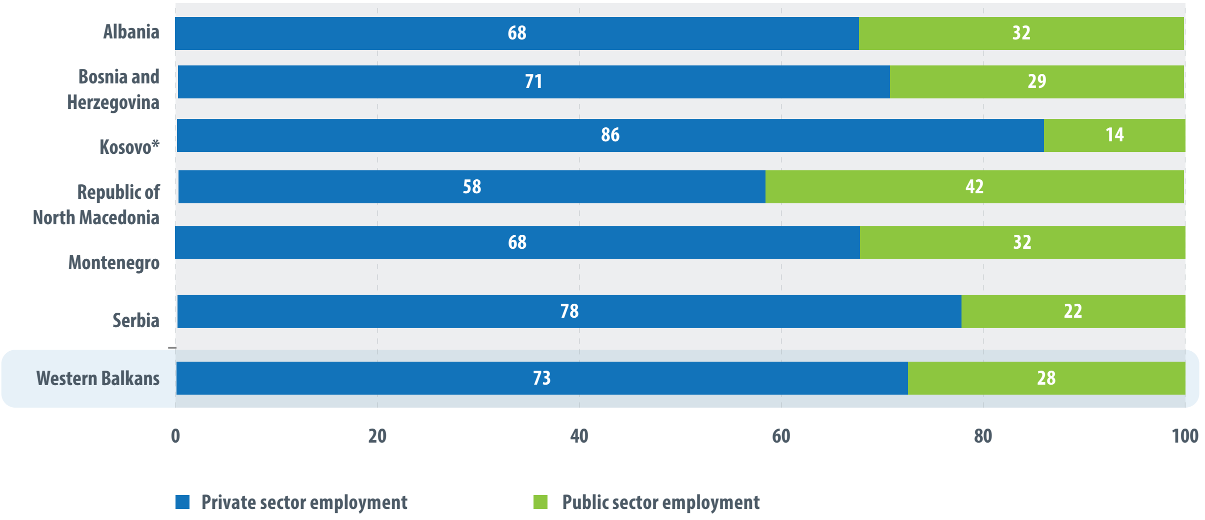


Figure 33: Is it a private or public sector employment?

(Employed, N=2441, share of total, %)

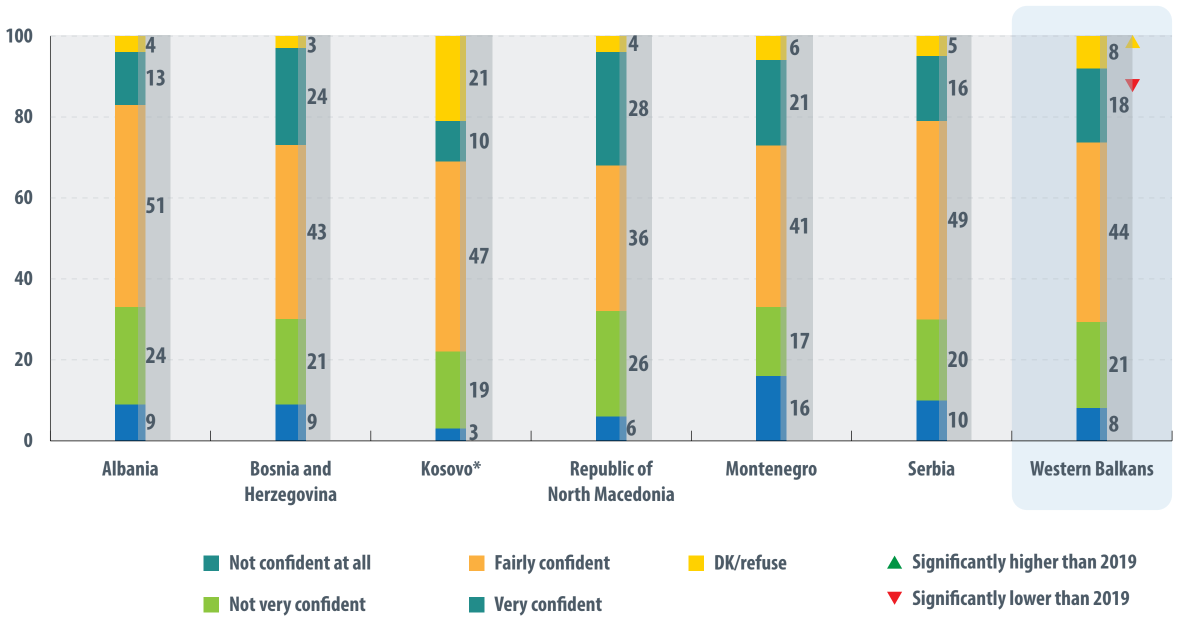


This instalment marks a distinguished shift from public employment to the private sector, with the latter being the main source of employment in the region (73%).

According to participants' responses, employment in government agencies, public institutions and publicly owned enterprises recorded a remarkable subtract, making up 28% of the region's population. Kosovo* leads in the overall respondents who identify themselves as private sector (86%), while at the same time it has registered the lowest concentration of civil servants, consisting 14% of the total share of respondents. Serbia follows with the second highest percentage of private sector employment at 78%. Oppositely, the Republic of North Macedonia (58%) has the fewest private sector employees while holding the highest number of public servants in the region (42%).

Figure 34: How confident are you in keeping your job in the coming 12 months?

(Employed or self-employed, N=2997, scale from 1 to 4, share of total, %)

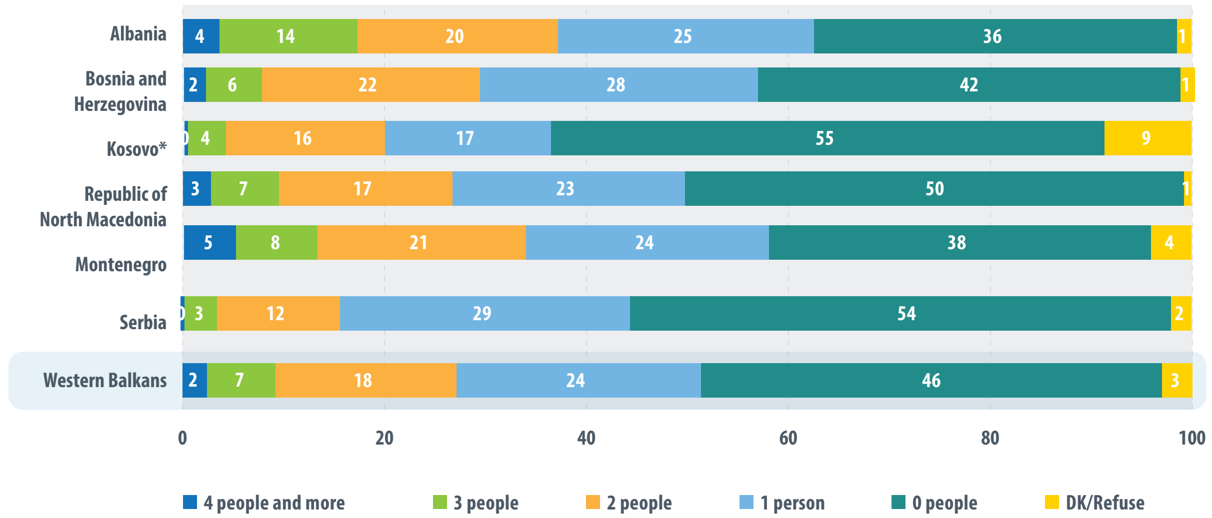


Following the shift away from the safer public employment, job security has notably deteriorated at regional level (-7).

Specifically, economies that recorded the highest number of respondents working in the private sector also recorded insecurity in keeping their job in the coming year. Montenegro (62%), Serbia (65%) and Kosovo* (57%) have marked sizable decrease in the number of respondents who are confident they will maintain their current job position in the next twelve months (with a subtraction of 10, 7 and 12 points, respectively).

Figure 35: How many people in your family, who are able to work, are unemployed?

(All respondents, N=6000, share of total, %)



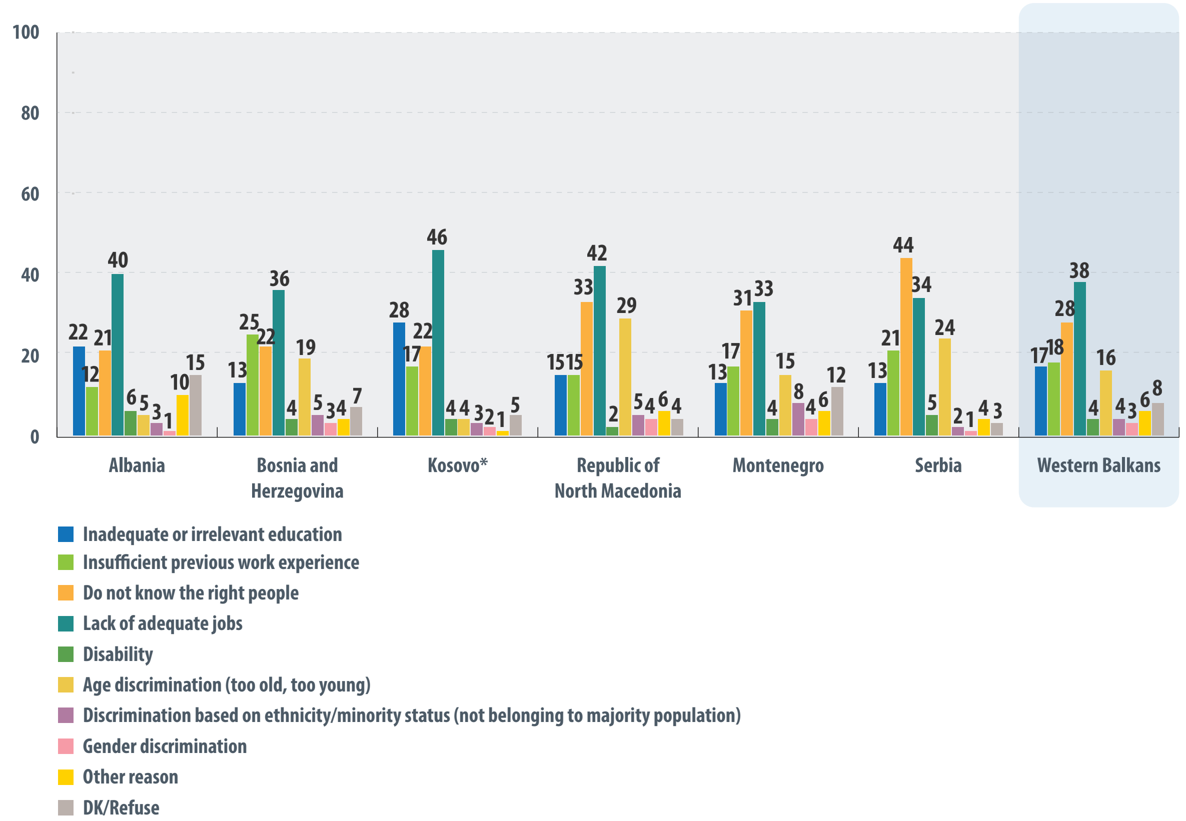
Regarding unemployed members within a family, results indicate a detrimental trend in the number of respondents who identify no member of their family as unemployed, albeit at a minimum rate of 1% (46% from 47% in 2019). In addition, the percentage of households counting an unemployed member of the family have significantly decreased, now comprising 24% of the population (from 28% in 2019).

Roughly one-fourth of participants claim to have one unemployed family member (from 28% in 2019), while less than one-fifth have three members currently not working. Interestingly enough, the share of households with one unemployed member in the family has contracted by 4 points; however, the number of respondents who claim to have two or three members in their family currently unemployed has increased by 1 and 2 points, respectively.

In this cycle of Barometer, Kosovo* is the region's leader in the number of households with no unemployed members (55%), even though this number has dropped by 27 points in the span of one year. On the flip side, Albania is home to the highest number of respondents with no unemployed family members, thus making up 36% of its entire population.

Figure 36: What are the two (2) main obstacles to those in your household who do not work?

(Households with at least one unemployed person, N=3111, maximum 2 (two) answers, %)



The two top ranked obstacles to employment, as cited by respondents, remain "shortage of adequate jobs", which now leads the list with 38% and "not knowing the right people" with 28%, albeit shifting to the second position compared to last year.

The perceived levels of nepotism in hiring remain a great cause of concern and indicate that trust in employers, whether private or public, is low and must be addressed in a structural manner by region's economies. Inadequate education and lack of work experience are considered barriers to employment by 17% of respondents and 18%, respectively, with the latter recording a 5-point spike since last year.

Meanwhile, discrimination based on age, albeit at a relatively high level, has experienced a notable 4-point drop as a main concern, with 16% of all respondents citing it as an obstacle (from 20% in 2019). At a closer look, Kosovo* remains the economy which considers lack of adequate jobs as its biggest challenge, with 46%. Irrelevant education is also seen as a great cause of concern in Kosovo*, since 28% of citizens find it to be the main reason for their household member's unemployment.

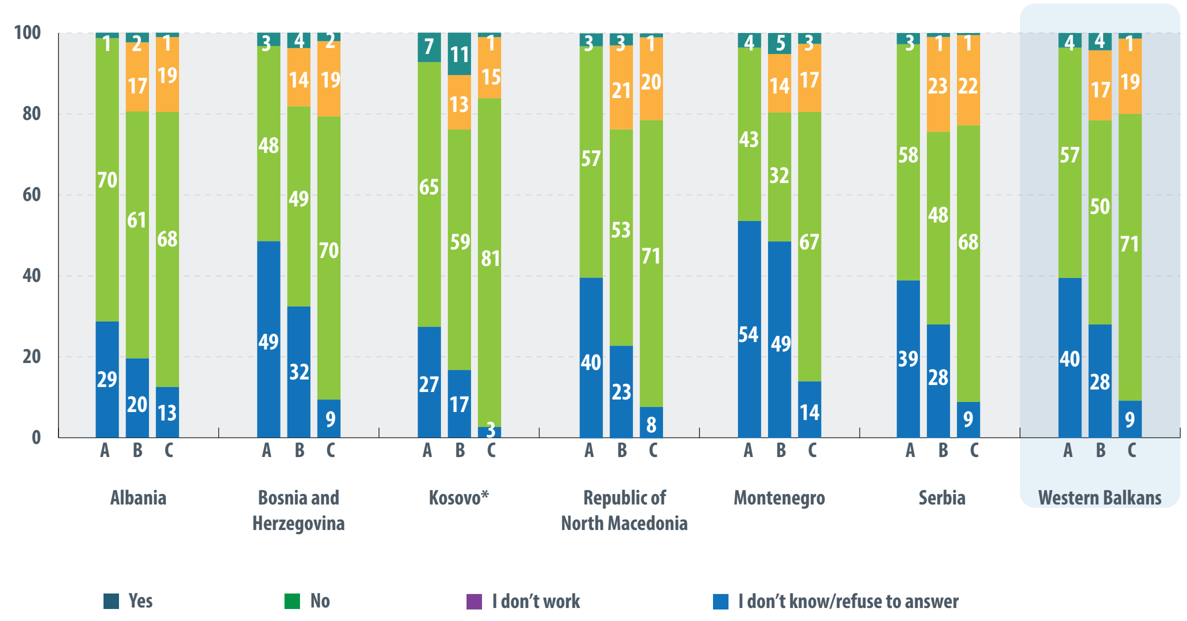
The Republic of North Macedonia (42%), Albania (40%) and Bosnia and Herzegovina (36%) follow immediately and share a common level of concern over insufficient job opportunities, though the two economies follow different trends from last year. Albania recorded a significant decrease of 12 points in the number of respondents who view shortage of job opportunities as an obstacle, while Republic of North Macedonia recorded a spike of 14 points since 2019. Out of all Western Balkan economies, Serbia is home to the highest number of citizens who complain about not knowing the right people, reaching a total of 44%. Meanwhile, insufficient work experience is higher in Bosnia and Herzegovina (25%), compared to other economies.

At the same time Republic of North Macedonia leads the region in age discrimination, with 29% of citizens worrying over this reason for their household member's unemployment.

Figure 37: Did any of the following situations happen to you in the past 3 years?

A - Someone from your family, a relative, or a friend lost their job?; B - One of your colleagues has lost their job?; C - You lost your job?

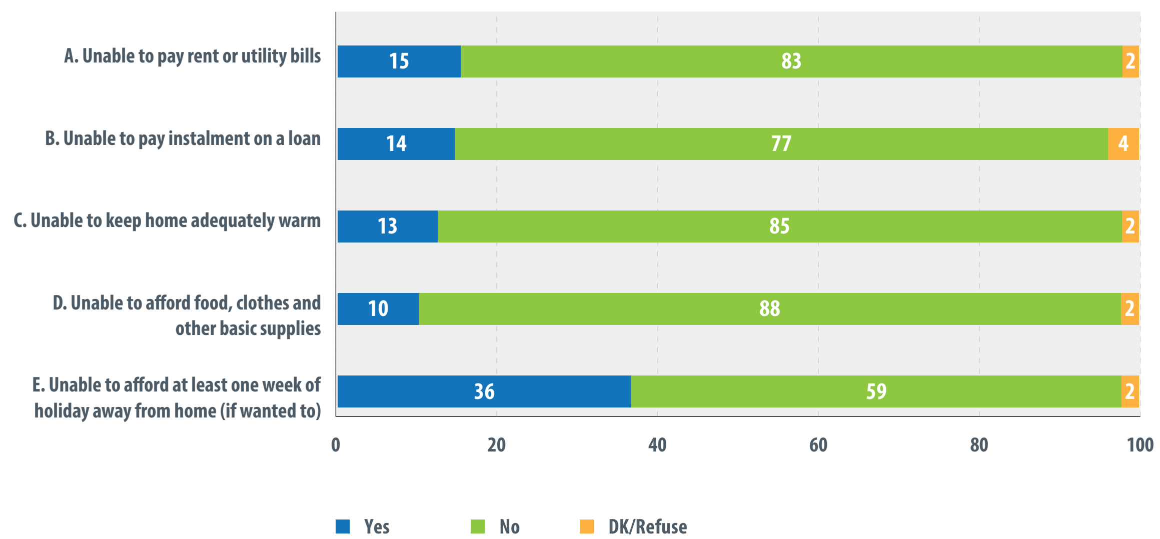
All respondents, N=6000, share of total, % of agreement or disagreement)



Regarding the job losses in the respondents' immediate circle such as family or friends, the number of participants who reported dismissals of friends and relatives has incremented by three points (40% from 37% in 2019), while the number of co-workers laid off has increased by a minimum of one point (28% from 27% in 2019). Results imply a regional instability in the labour market, since for two consecutive years the Barometer recorded a notable spike in the number of relatives and colleagues fired (compared to 2018).

Figure 38: Did your household face any of the following problems (even at least once) during the past 12 months? (Results for the Western Balkans region)

All respondents, N=6000, share of total, % of agreement or disagreement)



As for the individual economies, Montenegro has the highest proportion of citizens who witnessed job losses in all three categories; their family's or friend's job loss (54%), the job loss of a colleague (49%) as well as respondents who lost their own job in the last 3 years.

On the other end stands Kosovo*, with roughly one-fourth of respondents claiming to have experienced job losses of their family members, 17% witnessing the job loss of a colleague, while 3% claim to have lost their own job during the last 3 years.

In terms of financial stability, more specifically the ability to afford food, home rent, utility bills etc., positive tendency is observed at the regional level. The majority of Western Balkans respondents (83%) claim that they do not face any obstacle to pay rent or utility bills. According to survey results, 83% of all participants do not find it difficult to pay rent and utility bills, compared to 17% who don't find themselves in the same situation.

The preponderance of citizens claim they are able to cover basic supplies, such as food, rent and house heating, however, when it comes to affording at least one vacation a year, 59% of participants claim they are able to do so, while 36% of them say that this luxury is unaffordable for their current budget. 77% of participants can afford to pay a loan instalment, while 14% state otherwise. While the majority of citizens (88%) are able to afford food and clothes, 10% struggle to pay for such basic supplies.

The volume of remittance payments has contracted by 5% at the regional level, with one-fifth of respondents reporting to have received assistance from abroad (19%, down from 24% in 2019). After a period of incremented remittance payments, the rising outward economic migration across the region has not translated to increased remittances this year, and the socio-economic consequences of COVID-19 pandemic may have had a play in this part.

Though Kosovo* leads with the share of remittance recipients, results of this cycle of the Barometer show that remittances were roughly halved (to 28%, from 45% in 2019). Kosovo* has witnessed large oscillations in a life span of seven years, with the volume of

Figure 39. Did your household face any of the following problems (even at least once) during the past 12 months? (Results by economies)

A - Unable to pay rent or utility bills; B -Unable to pay instalment on a loan; C - Unable to keep home adequately warm; D - Unable to afford food, clothes and other basic supplies; E - Unable to afford at least one week of holiday away from home (if wanted to)

All respondents, N=6000, share of total, % of agreement or disagreement)

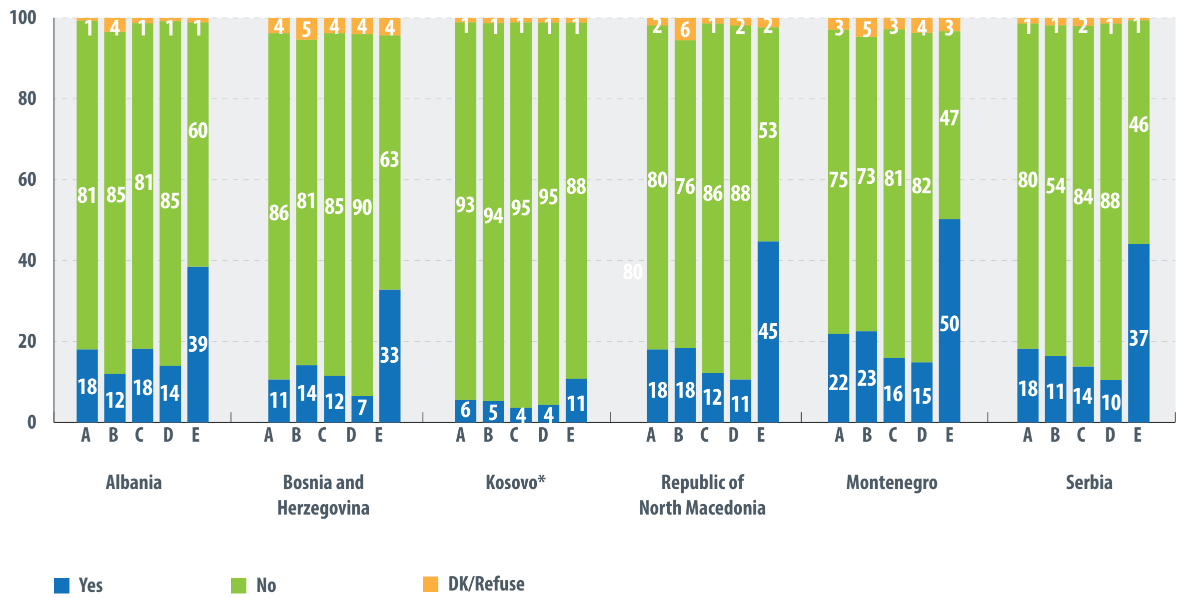
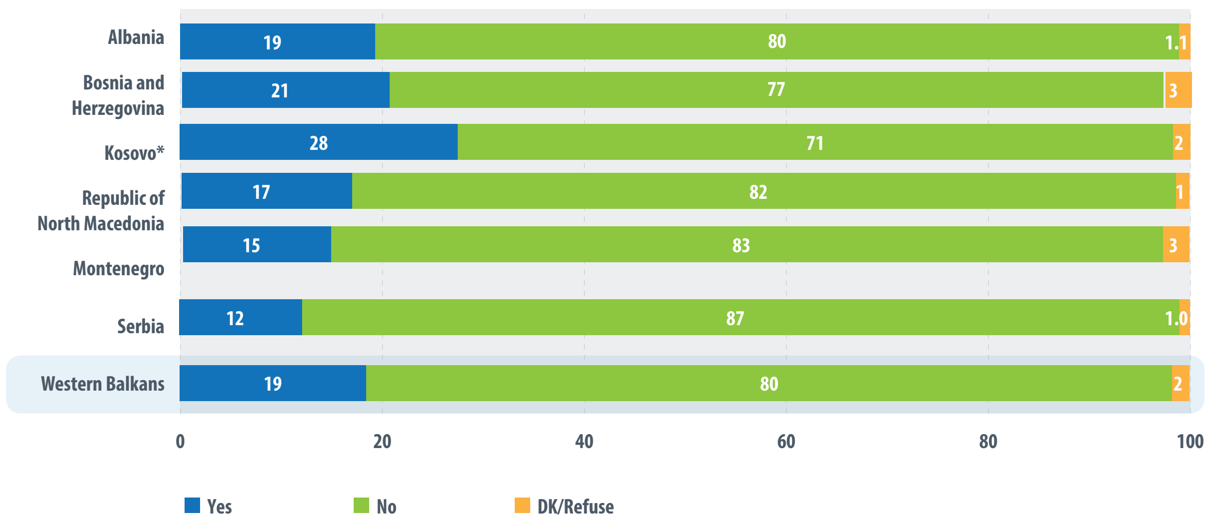


Figure 40: Did your household receive help in the form of money or goods from another individual living abroad at least once in the past 12 months?

All respondents, N=6000, share of total, % of agreement or disagreement)



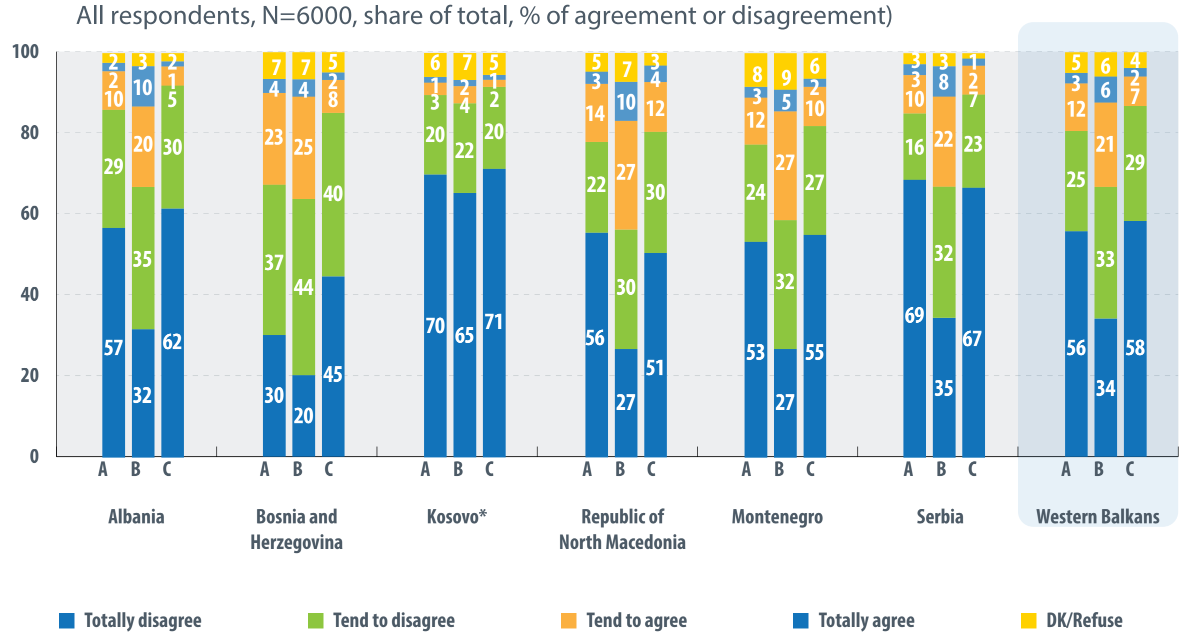
remittances going to as low as 28% (in 2016 and 2020) and then as high as 47% (in 2017).

Following a different trend, Bosnia and Herzegovina has witnessed again a spike in remittance payments with the influx of assistance from abroad reaching 21% (from 18% in 2019). Meanwhile, the rates of remittance payments to Albania have sharply subtracted to 19% (from 33% in 2019). Serbia, on the other hand, is the only economy whose citizens record the lowest benefits from remittances, which despite an increment of 5 points, remains far behind neighbouring economies (12%). Republic of North Macedonia (17%) and Montenegro (15%) have both experienced a notable drop by

Figure 41: To what extent do you agree with the following statements?

A - Some people look down on you because of your income or job situation; B - I feel there is a risk that I could fall into poverty; C - You feel left out of society.

All respondents, N=6000, share of total, % of agreement or disagreement)



4 and 8 points respectively in the number of citizens who have received assistance from abroad within the last 12 months.

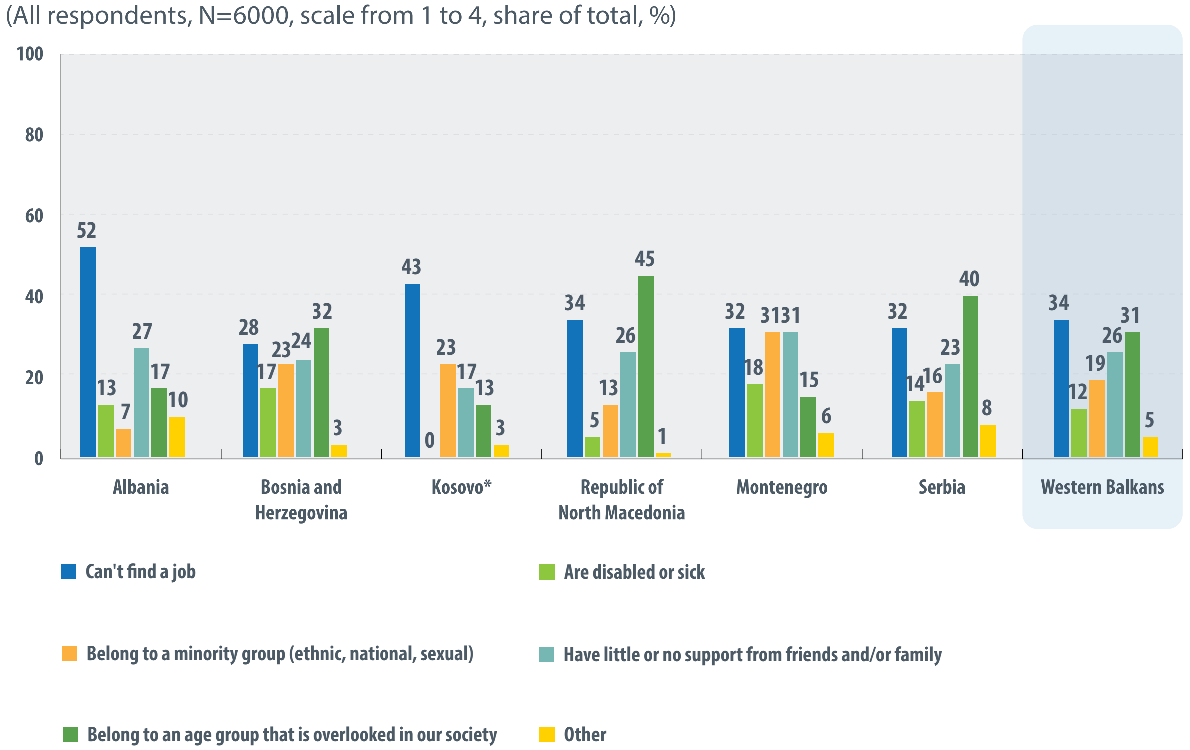
Some 15% of citizens feel looked down upon because of their employment status or income level. In contrast to the previous year, this number has increased, pointing out to a deterioration of such sentiments. Since the inception of the Barometer in 2014, this number has subtracted by only 2 points.

At economy level, Bosnia and Herzegovina shelters the highest proportion of respondents who feel undervalued because of their job or financial situation (27%), while Kosovo* stands at the other end of the scale, with just 4%, a sizable shrink by 11 points compared to 2019. The share of region's citizens who are anxious about falling below the poverty line has increased by 4 points (27%, from 23% in 2019%), thus indicating a negative trend for the economic health of the region. Republic of North Macedonia continues to lead the region with the highest number of citizens who constantly fear the poverty trap (37%), albeit a 1-point contraction.

Surprisingly, Bosnia and Herzegovina reports a downturn in economic status with 27% perceived as potentially on the brink of poverty (up from 20% in 2019). As expected, it seems like most of the citizens in this economy feel excluded from their society because of their unemployment or income level, and another significant percentage of respondents is preoccupied about falling in the poverty trap which comes as a result of unemployment and insufficient income. Overall, 10% of respondents feel left out of the society, with Republic of North Macedonia leading the region with the most excluded citizens (16%). Kosovo*, meanwhile, is home to the lowest concentration of citizens who report a sense of societal exclusion (3%).

Figure 42: You feel left out because you:

(All respondents, N=6000, scale from 1 to 4, share of total, %)



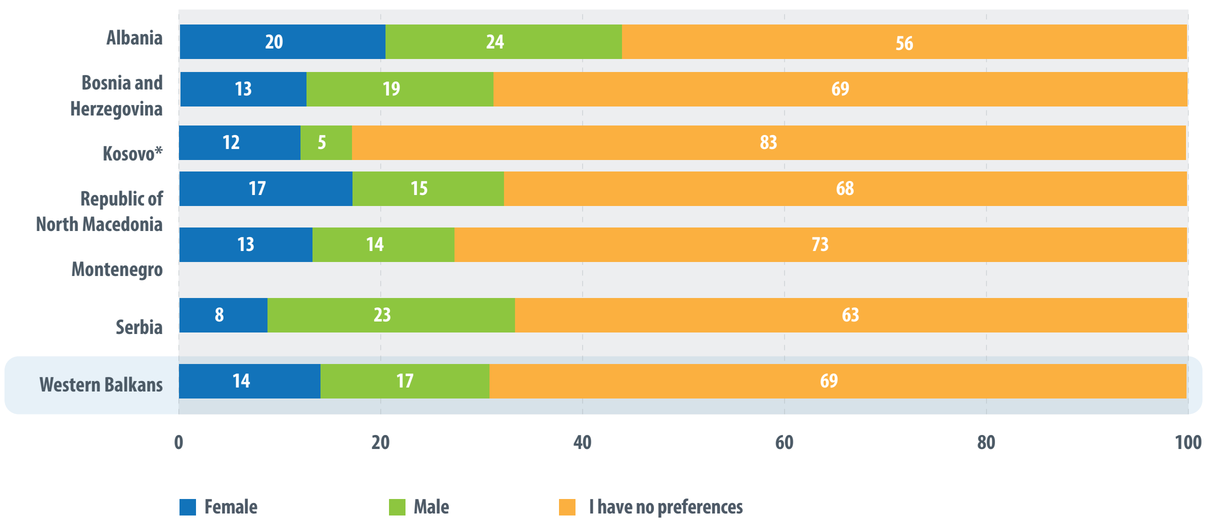
Individuals who feel excluded from their societies due to the inability to find a job (34%) have again outnumbered respondents who feel excluded because of their age (31%).

Individuals who cite their ethnical belonging (19%) as a barrier to social inclusion have increased in number by 3 points, while lack of their family support (26%) as a barrier to inclusion has decreased by 1 point. Meanwhile, people who feel concerned about their exclusion because of their medical condition or disability has incremented by 1 point, reaching 12% of all participants' responses. Albania (52%) shelters the highest number of respondents who blame unemployment for their social exclusion. Excluded respondents in Republic of North Macedonia are predominantly preoccupied with their age group (45%). This is a substantial 10-point increase since 2019 and also an indicator of demographic changes in this economy. Interestingly, this cycle of the Barometer indicates two interesting facts about Kosovo*: a remarkable decrease (-11) of the percentage of respondents who feel excluded because they have disabilities, (hence, in 2020 there are no participants who feel excluded because of their disabilities).

Montenegro is home to the largest proportion of respondents who feel excluded because of belonging to a minority group or because they receive little or no support from friends and family (31%), marking a 10-point spike and a 17-point spike, respectively. In a nutshell, the region has seen an overall contraction in the number of individuals who view themselves as excluded from the society, specifically with the above-mentioned factors being the cause of their social exclusion.

Figure 43: Do you prefer to have a female or male boss at work?

(All respondents, N=6000, share of total, %)

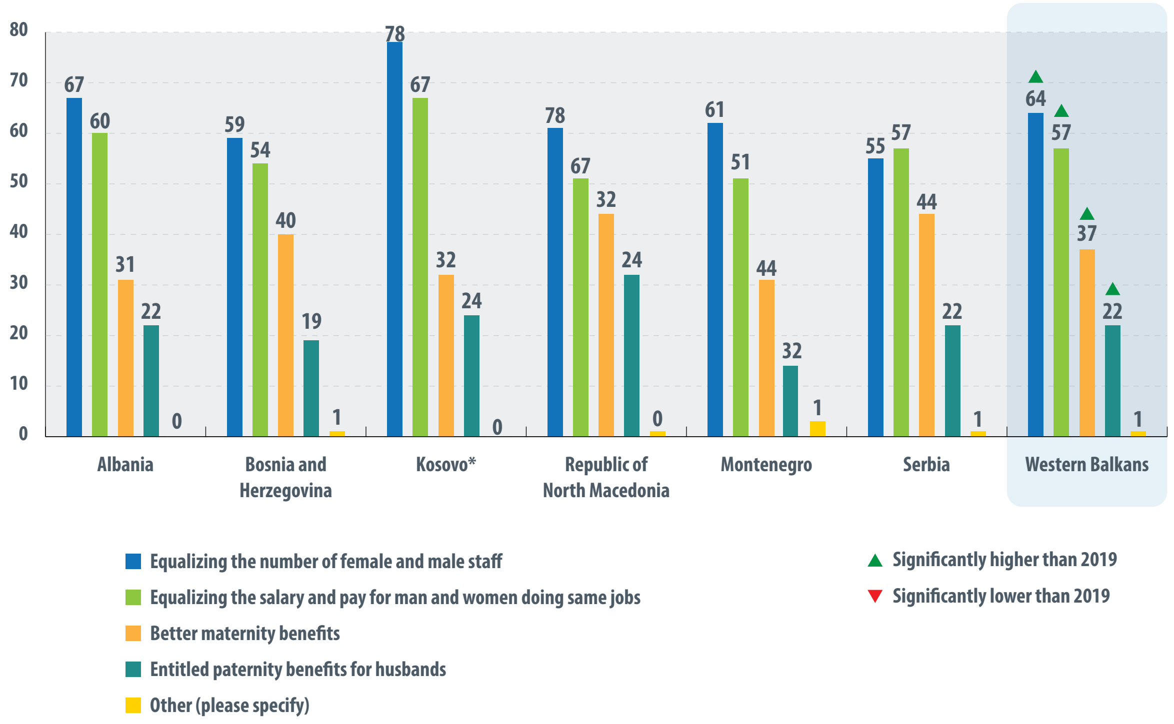


The disparity between respondents who prefer male over female supervisors are still ahead in regional rankings (17% versus 14%), though the discrepancy has narrowed down to 3% (from 5% in 2019).

Kosovo* and Serbia represent two sides of the same coin when it comes to respondents' preferences on their supervisors based on gender. While Kosovo* is a proponent of female supervisors, with 12% of citizens voting in favour of women and 5% of them preferring male bosses, Serbia is the economy with the highest gap of respondents who prefer male supervisors over female ones, comprising one-fifth of the entire population (23% versus 8%). With 83% of participants stating to not have any preference, Kosovo* is also the region's leader economy in terms of its neutral attitude on this issue.

Figure 44: Gender equality at work can be improved by:

(All respondents, N=6000, share of total, %)



With the gender gap disparity as a prevailing obstacle in the region, respondents seem to see different measures as the adequate mitigation tools for an equal work environment, regardless of gender. Individuals who think that equalising the number of female and male staff (64%) is the most effective tool to combat gender inequality at work, have outnumbered those who state that ensuring equality in salary and enforcing hiring quotas for female and male staff (57%) is the most important mitigation measure.

Better maternity benefits are also considered as an adequate solution to address gender inequality at work, with over one-third (37%) of respondents supportive of this strategy (a 5-point increase since 2019); while entitled paternity benefits have been ranked fourth, thus making up 22% of the entire participants. Kosovo* is the region's main proponent of equal number of female and male staff, with 78% of the citizens stating they can bridge the gender gap at work (recording a remarkable if not unprecedented increase of 31 points). Meanwhile, 60% of respondents in Albania support equal pay as the preferred strategy for gender equality, recording a sizable 7-point spike compared to 2019. Conversely, Kosovo*, with 24%, is the region's most forceful advocate of better paternity benefits. Respondents in Republic of North Macedonia (44%) and Bosnia and Herzegovina (40%) support improving maternity benefits to an extent unmatched by other economies. In general, a positive increasing trend has been observed in regards to citizens' awareness of gender equality at work and the importance of mitigating these challenges through adequate measures.

EMPLOYABILITY AND LABOUR MARKET

In terms of employment and labour market trends, there is a growing number of participants who think that the main preconditions for both getting ahead in life and finding a job are related to education and hard work.

Some 58% feel that having a good education and working hard are equally considered as the two most important factors which account for a better future, while job qualifications and education are considered the most important asset to find a job by 38% of citizens. On the other hand, knowing the right people is also considered as a key element for a bright future, and is an incrementing trend noted in the region, with 54% of citizens claiming it as important, while more than a third believes that being lucky will get you ahead in life.

The public sector remains the most desirable employer for one-third of survey respondents, although to a slightly lesser degree than last year. Preferences over public companies have been experiencing a remarkable decrease each year, thus reaching its nadir of percentage in the life span of 7 years. More specifically, one-fifth of respondents would prefer to be hired in public companies. The private sector still remains the least desirable sector to work in, with only 13% of the region's respondents choosing private sector over the public one.

Professional experience has recorded a notable increase by 10 points in the number of respondents claiming it to be a prerequisite for finding a job, thus being ranked as the second most important factor which was cited by 30% of the region's citizens. Roughly a third of all survey participants claim that personal contact represents a crucial factor in finding a job, and albeit this percentage stands at quite a high level, it has decreased by 7 points compared to last year. Similarly, having family or friends in high places is continuing to be less and less seen as a factor in finding a job, with 31% of the respondents thinking it is still important (a 4-point drop down since 2019).

Although the time gap between finishing graduation and getting employed remains the main concern for all economies in the region, the increment in the number of graduates who got a job within the first three years paints an optimistic picture of the labour market in the region, with long-term unemployment being contracted as a phenomenon among the Western Balkans (67%). The greatest improvement has been seen in Albania, with 42% of the respondents having found employment in less than a year, which doubled in size compared to last year. At the regional level, roughly one-third of the graduates in the region were able to secure employment in less than a year of finishing their education, while more than two-thirds found a job within the first 3 years.

Figure 45: What do you think is the most important for getting ahead in life?

(All respondents, N=6000, share of total, %)

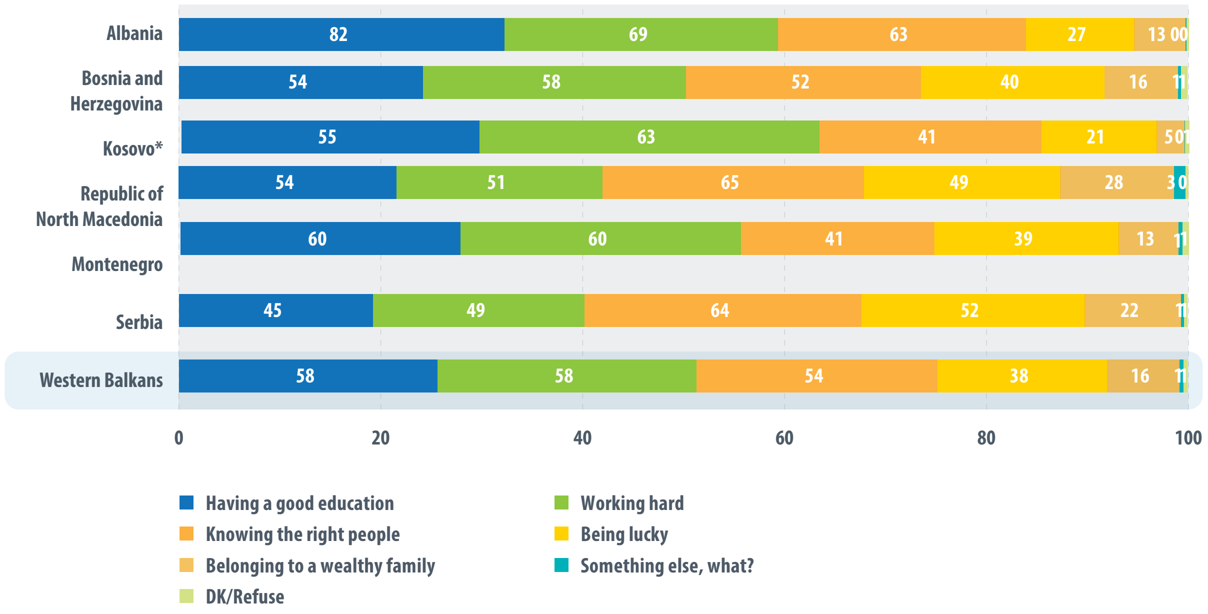
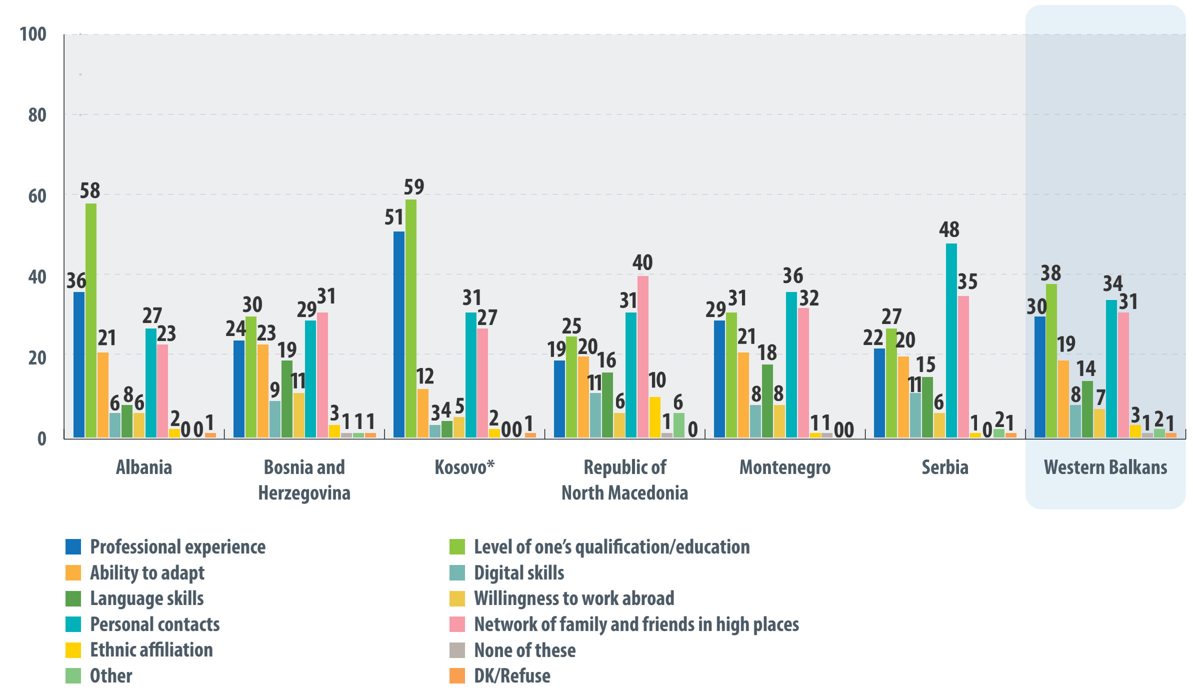


Figure 46: In your opinion, which two assets are most important for finding a job today?

(All respondents, N=6000, maximum 2 (two) answers, %)



The regional public perception of prerequisites for being successful has marked a double increase in all categories for this cycle. Results reveal an interesting fact; the number of respondents who think that working hard or having a good education are the main factors for a better future has spiked; and simultaneously, respondents who think that being lucky, knowing the right people, or belonging to a wealthy family is important, have also doubled this year.

At the regional level, having a good education and working hard are equally considered as the two most important factors which contribute to a better future, thus comprising 58% of the entire respondent population in the region. The number of participants who percept good education as the most important prerequisite has increased by 32 points, thus recording an unprecedented spike since the inception of Balkan Barometer. Likewise, individuals who think that working hard is an imperative for success have now increased by 38 points, an incremental trend which has reached its zenith, compared to the previous cycles. On the other hand, knowing the right people is strongly considered as a key element for a bright future, and is an incrementing trend noted in the region, with 54% of citizens claiming it as important (up from 30% in 2019). Those who believe that being lucky will get you ahead in life comprise more than a third of the population (38%), which is an increase by 23 points since 2019.

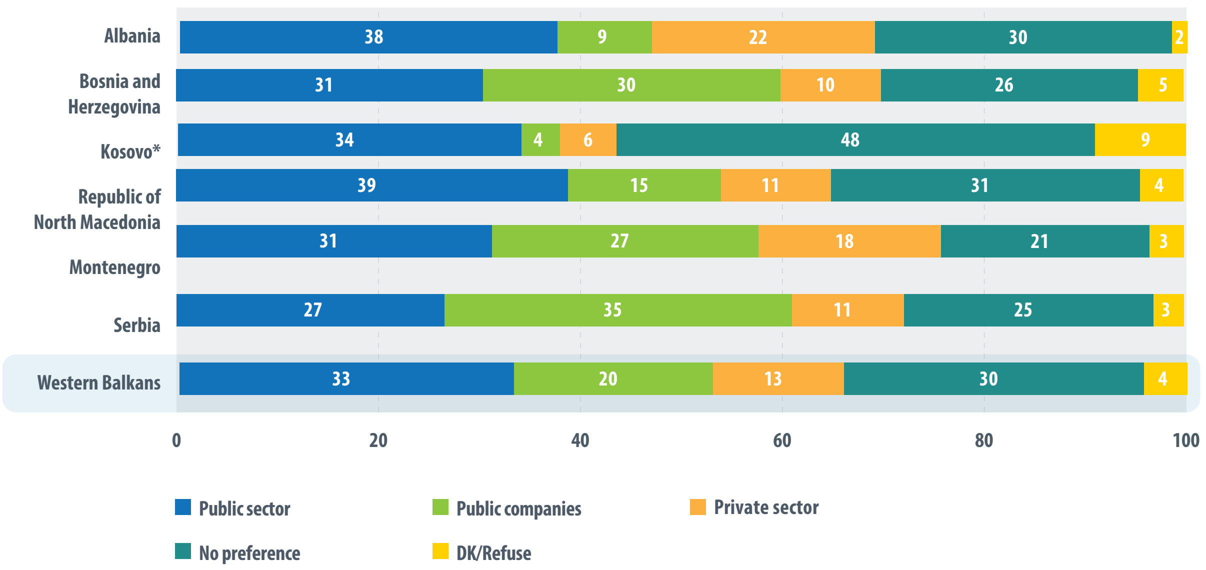
At economy level, the belief that education is the right path to a better future is mostly pronounced by respondents from Albania, with 82% of them considering this criterion as the most important. Interestingly enough Albania is also home to the highest concentration of respondents who think that working hard pays off, thus consisting 69% of the total participants. On the other end stand Republic of North Macedonia (65%) and Serbia (64%), both recording a predominant percentage of respondents who think that actually knowing the right people is what one really needs in order to get ahead in life. While roughly half of the populations from both of the abovementioned economies also believe that luck is what determines one's future, with 52% of respondents from Serbia and 49% from Republic of North Macedonia feeling this way. While Montenegro (60%) and Kosovo* (63%) record a similar trend in prerequisites for a better future, thus attributing merits to hard work as the key for getting ahead in life.

Job qualifications and education are considered the most important asset to find a job, with 38% of the total respondents citing it as crucial (from 36% in 2019). Professional experience has recorded an increase by 10 points in the number of respondents claiming it to be a prerequisite for finding a job, thus being ranked as the second most important factor cited by 30% of the region's citizens. Roughly a third of all survey participants (34%) claim that personal contact represents a crucial factor in finding a job, and albeit this percentage stands at quite a high level, it has recorded a detrimental trend by 7 points compared to last year. Similarly, having family or friends in high places is less seen as a factor in finding a job, with 31% of respondents thinking it is still important (a 4-point drop down since 2019).

Encouragingly for Kosovo* (59%) and Albania (58%), job qualifications are considered as important by the majority of job seekers in these economies. Kosovo* shelters the highest number of respondents who view professional experience as a key factor to enter the labour market, with half of the survey participants marking it as a priority. Meanwhile in Serbia, personal contacts dominate the survey results, thus making up 48% of the total responses. A similar trend is recorded in Republic of North Macedonia, where 40% of citizens think that having a network of people in high places is what it takes to get a job. In general, however, there has been an incremental trend in professional experience and job qualifications being seen as determining factors in entering the labour market, while personal contacts and a network of important people, though remaining in high scales, have decreased significantly in the last cycle of Balkan Barometer.

Figure 47: If you could choose, would you prefer to work in the public (public administration and public companies) or private sector?

(All respondents, N=6000, maximum 2 (two) answers, %)

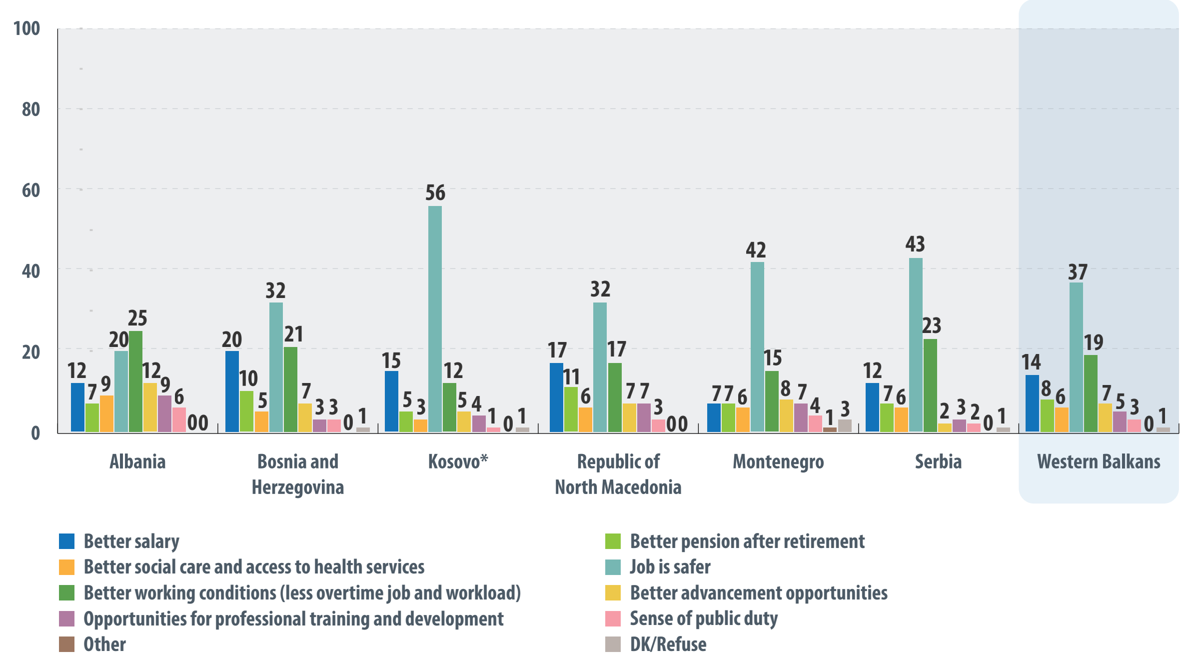


The public sector remains the most desirable employer for one-third of survey respondents, although to a slightly lesser degree than last year (33% from 34% in 2019). Preferences over public companies have been experiencing a remarkable decrease each year, thus reaching its nadir of percentage in the life span of 7 years. More specifically, one-fifth of respondents would prefer to be hired by public companies (from 24% in 2019 and 33% in 2018). The private sector still remains the least desirable sector to work in, with only 13% of the region's respondents choosing private sector over the public one.

On the other hand, the number of respondents who claim to have no preference whatsoever has increased by two points since last year, now consisting 30% of the entire population. Republic of Macedonia (39%) and Albania (38%) are this year's most proponent economies of the public sector, while Serbia is home to individuals who prefer private sector over the public one. Interestingly enough, Kosovo* respondents have expressed a neutral attitude, with roughly half of the respondents stating they prefer neither the public sector, nor the private one. While this section indicates that governments remain the region's favoured employer, the growing rank of neutral respondents shows that prospective job seekers are increasingly open to pursuing employment opportunities wherever they may arise, which is a positive development for the region's labour market.

Figure 48: If you prefer to work in public sector, what is the main reason?

(Those who prefer working in public sector, N=3480, maximum 2 (two) answers, %)



Job security is consecutively seen as the prevalent factor behind the preference of the public sector over the private one, since 37% of the region's participants cite it as the main reason, though this percentage has seen a dropdown by 11 points since 2019. On the other hand, better working conditions (19%), and higher salaries (14%) are seen as the second and third most important reasons for their preference of the public sector. Interestingly, all of the abovementioned premises have seen a significant drop in interest over the past several editions of the Balkan Barometer, since 2017. This may be a contributing factor to the decrease in interest when it comes to public sector employment, a positive omen for the health of the region's labour market.

Respondents in Kosovo* value job security the most, compared to other survey participants (56%, up from 36% in 2019). Better working conditions, though experiencing a sharp decrease by twenty points, recorded the highest number of responses from Albania with 25%, while Bosnia and Herzegovina (20%) is the leader economy in considering better salary as a significant factor, thus witnessing a detrimental decrease by 21 points.

Figure 49: If you prefer to work in private sector, what is the main reason?

(Those who prefer working in private sector, N=704, maximum 2 (two) answers, %)

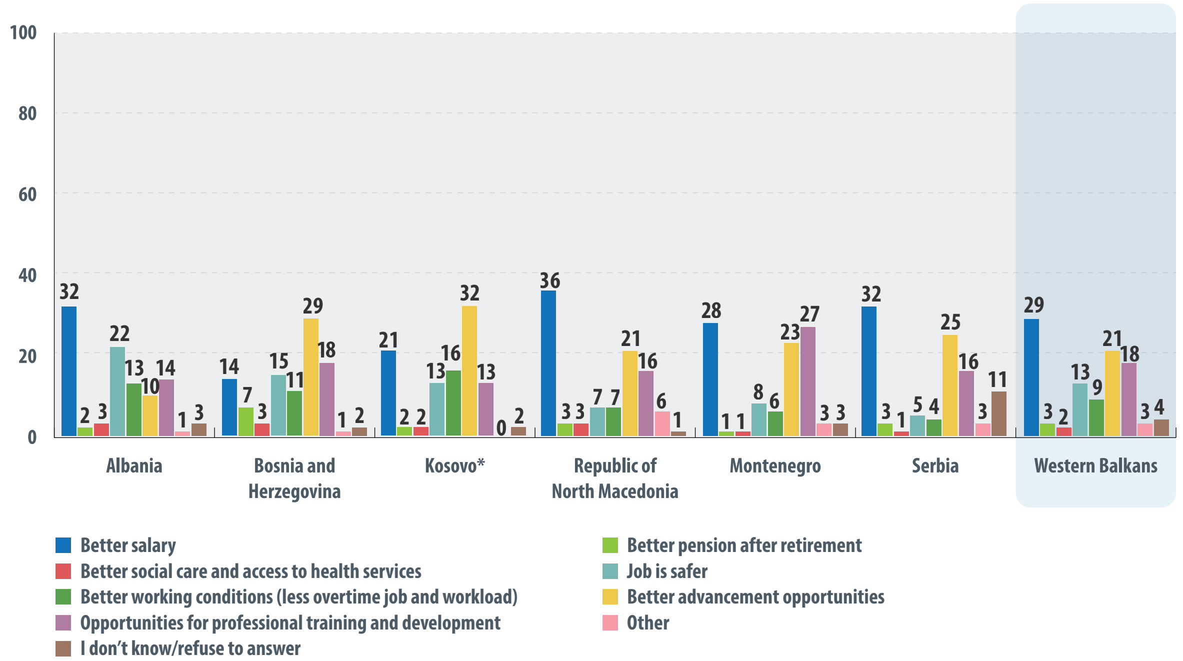
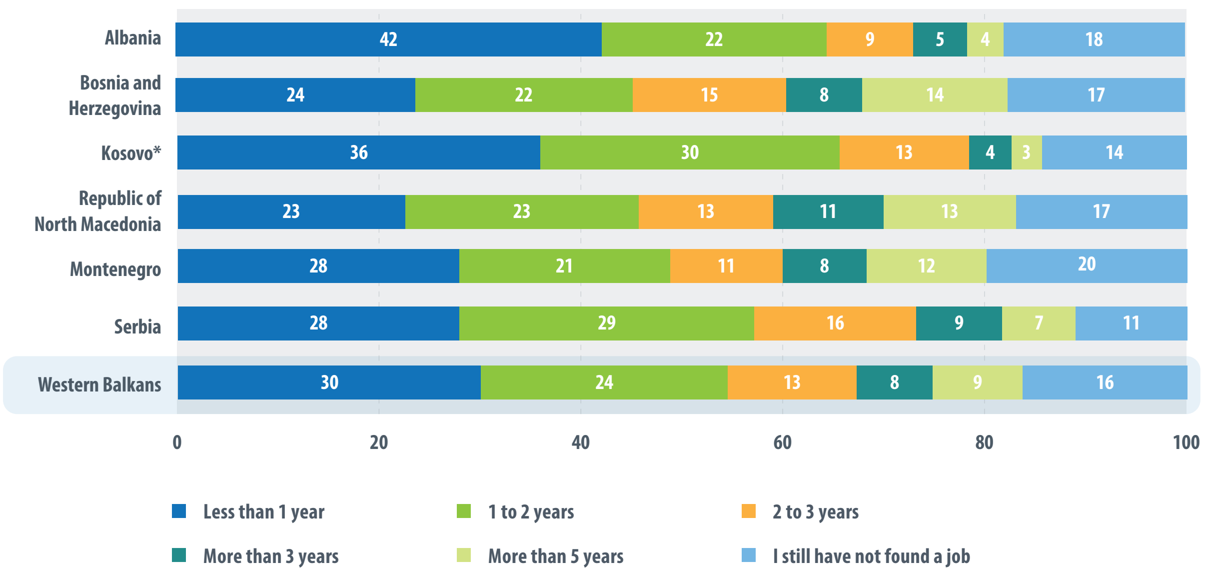


Figure 50: How long it took you between finishing education and getting the first job?

(All respondents, N=6000, share of total, %)



Those who prefer private over public sector state better salaries as the main driver behind their choice, thus making up 29% of the region's survey participants. Better advancement opportunities for development (21%) have been ranked as the second most important factor for private sector preference, while opportunities for professional training have been selected as a driver for 18% of all respondents. Job security has been selected as a reason by 13% of the population while better working conditions have been chosen only by 9% of the region's population. Overall, there has been a decreasing trend in here as well with more than a quarter of respondents primarily interested in professional growth on offer (27%).

Respondents who prefer to work in the private sector overwhelmingly do so for reasons of superior remuneration and, to a lesser degree, better working conditions. Republic of North Macedonia (36%), Albania (32%) and Serbia (32%), lead the field when it comes to respondents favouring better remuneration. Kosovo* (32%) is home to the largest group of respondents who feel that private sector jobs will offer them better advancement opportunities. Opportunities for professional training and development have been the most voted answer from respondents from Montenegro, thus making up roughly one fourth of all citizens.

Roughly one-third of the graduates in the region were able to secure employment in less than a year of finishing their education, while some 67% found a job within three years. The number of respondents who secured employment within the first two years has witnessed a growing trend since 2019 (54% from 47% in 2019). These numbers paint an optimistic picture of the labour market in the region with long-term unemployment being contracted among the Western Balkans. The greatest improvement has been seen in Albania, with 42% of the respondents having found employment in less than a year, which doubled in size compared to last year.

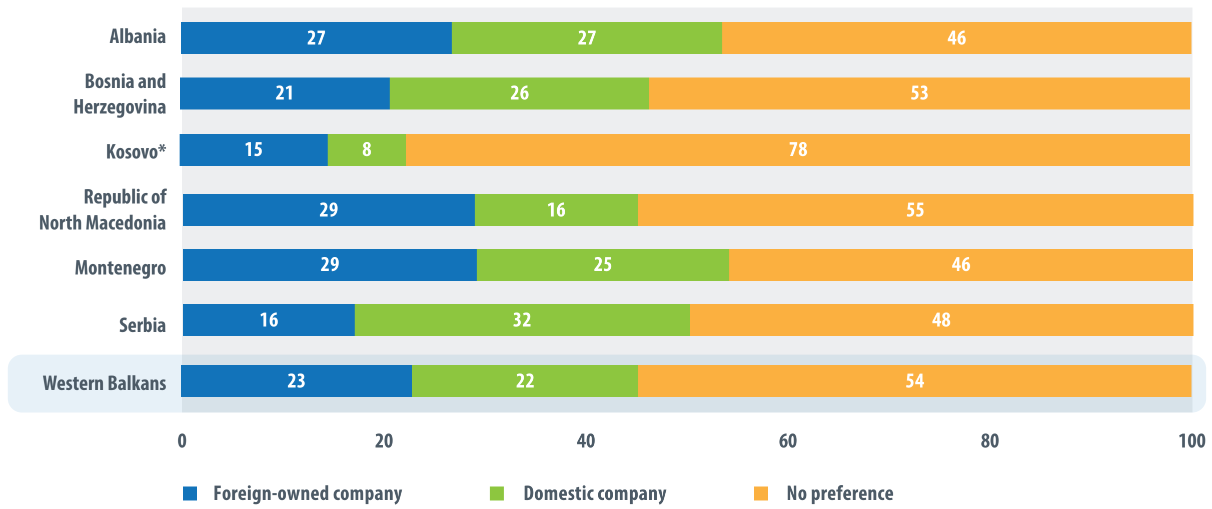
On the other side of the coin, Albania also records the second highest rate of graduates still looking for a job, with 18% of graduated citizens claiming to be unemployed, while Montenegro leads the list in this negative contingent, with one-fifth of graduates still looking for a job. Kosovo* respondents found a job between one year and two years after graduation, thus recording a sizable hike by twelve points. The Republic of North Macedonia records the highest number of participants who found a job more than three years after finishing school, with 11% of citizens admitting to have done so.

For comparison purposes, the 2019 employment rate for recent graduates of the EU is 80.9%, which is only 0.9 percentage points below its relative peak in 2008.[6]

This year's results indicate a notable drop in the preference on foreign-owned companies over the domestic ones, with foreign companies being chosen by 23% of the total participants, while 22% of participants prefer the local ones. The majority of citizens, however, claim that they have no preference in this regard, and this neutral attitude represents more than a half of the population (54%, from 51% in 2019). Kosovo* stands out from the rest of the economies towards its neutral attitude, with 78% of its overall respondents claiming to have no preference whatsoever. Meanwhile, the highest bias regarding foreign-owned vs. domestic companies, is expressed in Albania with a 50-50 division; 27% of respondents prefer to work in foreign businesses while another 27% of them prefer to work in local companies.

Figure 51: Would you rather work for a...?

(All respondents, N=6000, share of total, %)



[3] Eurostat (2020): Employment rates of recent graduates (aged 20-34) not in education and training, by education attainment level, EU 2008-2019, available at: https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Employment_rates_of_recent_graduates#Employment_rates_of_recent_graduates

Figure 52: Would you agree that the skills you learned in the education system meet the needs of your job?

(All respondents, N=6000, share of total, %)

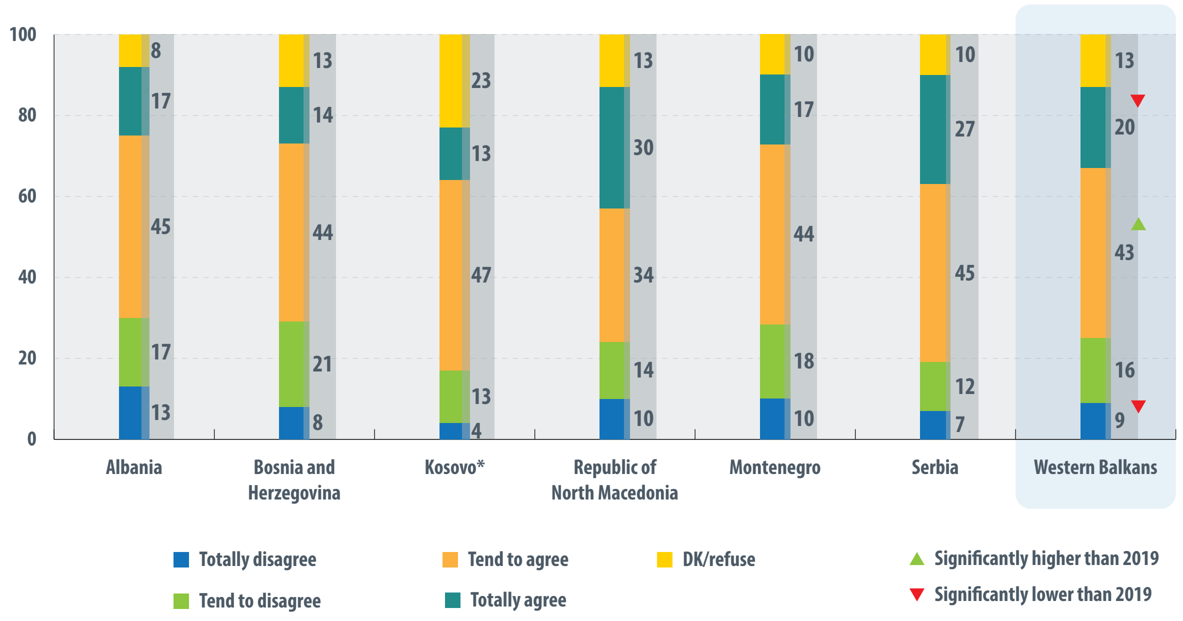
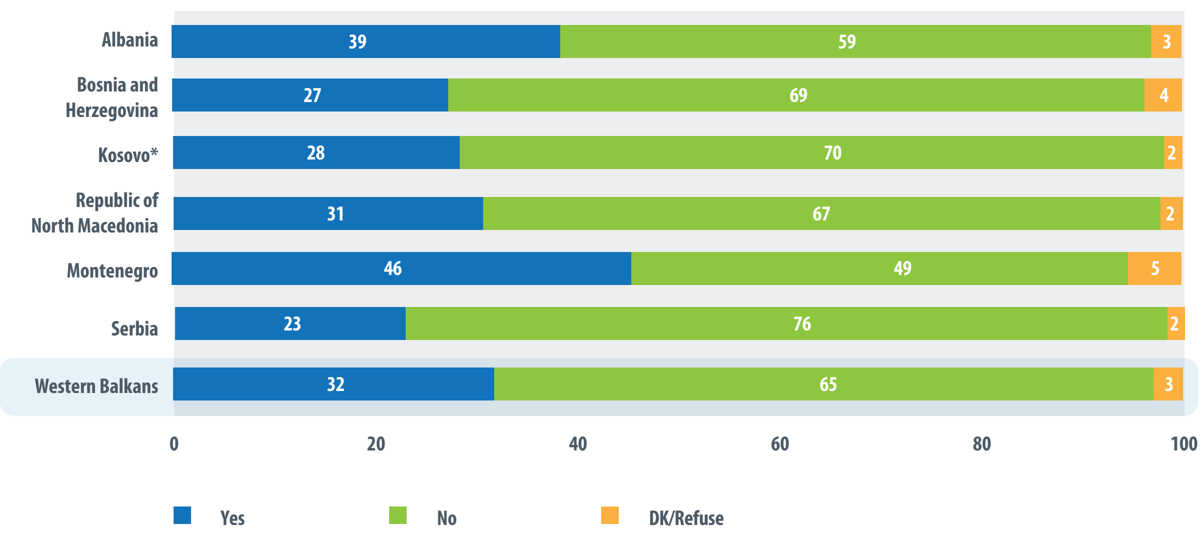


Figure 53: Has your job required you to learn new or advance your existing skills in the past 12 months?needs of your job?

(Employed or self-employed, N=2997, share of total, %)



The majority of participants (63%) found skills acquired through formal education as useful in their present job, with 25% disagreeing. The number of individuals who think education prepares you for the labour market has increased by four points since last year (from 59% in 2019), while simultaneously, less people think that these skills are not useful in their jobs (28% in 2019).

Respondents from Montenegro are least likely to be satisfied with the relevance of their education for the requirements of their workplace, with roughly half of the population happy with their education system (61%). On the other hand, respondents from Serbia value their education system the most, with 72% claiming that skills they acquired through education are relevant. When it comes to respondents dissatisfied with the way education prepares graduates for the labour market, Albania (30%), Bosnia and Herzegovina (29%) and Montenegro (28%) are ranked in the top three positions. Kosovo* on the other hand, is home to the lowest number of disappointed graduates from their education system in terms of its relevance to their workplace.

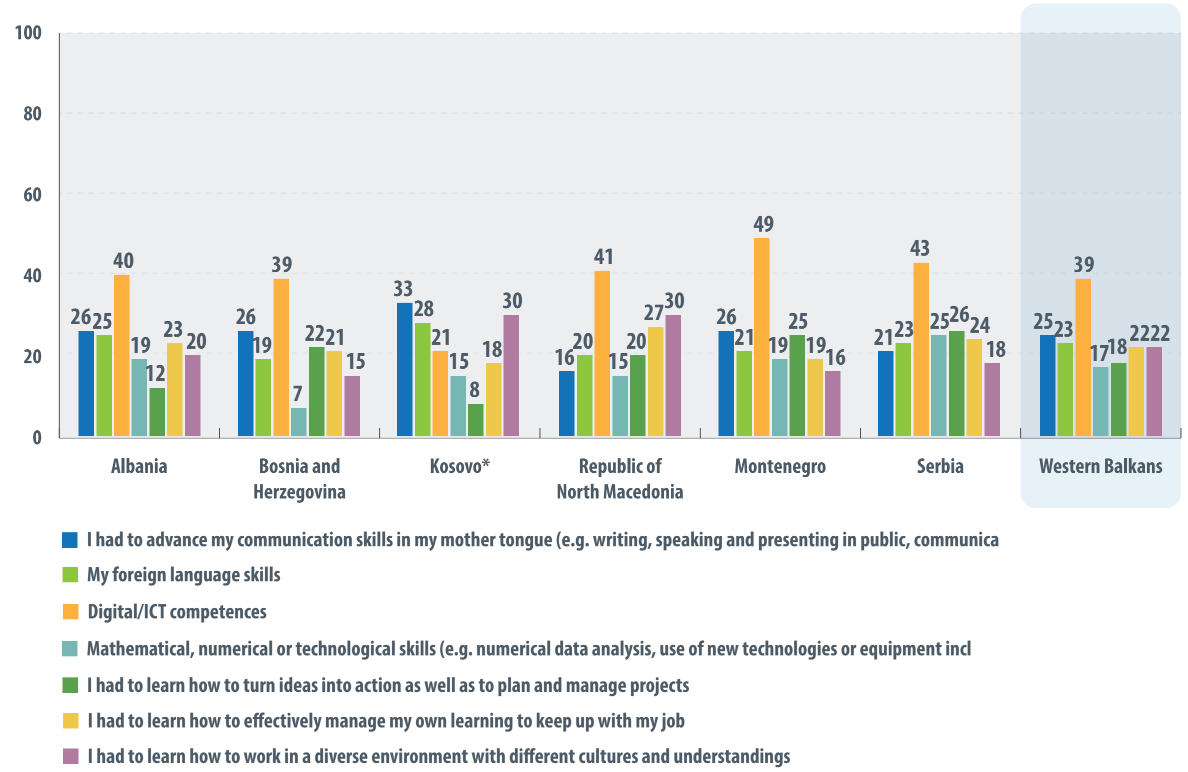
The fact that one-fourth of respondents in the region feel unprepared by the education systems in their economies is an urgent call for action by the governments to engage in a dialogue with both educators and employers.

As digitalisation is constantly shaping the economy, digital competences are increasingly seen as key capacities to remain relevant in ever-changing labour markets. As expected, digital skills are the most required area for improvement, with 39% of the region's employees stating to have been instructed to advance these skills (from 20% in 2019).

At economy level, half of all Montenegro's respondents (49%) were asked to improve their skills on digitalisation, while 33% of participants from Kosovo* were instructed to improve communication skills in their mother tongue. Kosovo* and Republic of North Macedonia are two economies where coping with a multi-cultural environment represents a competence targeted by roughly one-third of the employers (30%). In the meantime, 27% of Macedonian participants perceive that understanding how to effectively manage own learning to keep up with work is a continuous prerequisite in the workplace.

Figure 54: Which of these competences did you need to learn or advance:

(Those whose job required learning new or advancing skills in the past 12 months, N=951, multiple answers, %)



Results indicate an incrementing trend of employees' willingness to acquire additional trainings in order to excel at work; a remarkable spike of 11 points compared to the previous cycle of the Barometer. While 85% of the region's respondents are interested in further professional advancement, 12% express no interest in undertaking additional qualifications whatsoever. At regional level, the significant increase in the number of citizens who are willing to invest in self-development though trainings has been accompanied by an almost proportional decrease in the number of employees who would not undergo any additional training (down by 9 points since 2019).

Kosovo* witnessed an unprecedented spike by 23 points in employees' willingness to get trained, thus acquiring the leading position in the region. At the other end stands North Macedonia, which remains home to the lowest percentage of employees willing to undergo additional qualifications (73%), despite witnessing a 6-point increase. At the same time, respondents from the Republic of North Macedonia who don't consider additional qualifications as a priority for their advancement at work account for roughly one-fourth of its entire population. Overall, this edition of Balkan Barometer points out positive trends: an increasing awareness of employees in recognising the importance of 'skills-performance' relation.

This round of the Balkan Barometer reveals another interesting result; employed respondents express more interest in acquiring additional qualifications in order to keep up with their job, compared to those who are unemployed. An even more peculiar fact is that even if there exists a strong incentive (such as getting a job), unemployed individuals still express les interest in getting trained. However, at regional level, the majority of unemployed participants were willing to train up in order to get a job, thus making up 66% of the region's population. On the contrary, one-fourth of respondents describe themselves as unwilling to acquire additional trainings.

Concerning enough, one-third of Albania's citizens (34%) claim to not be ready for additional qualification in return for employment, and at a similar rate, 31% of unemployed respondents from Bosnia and Herzegovina share no interest in advancing their qualifications. Montenegro (79%) and Kosovo* (76%) hold opposite attitudes towards further qualifications, and at the same time Kosovo* also records the lowest number of unemployed respondents who wouldn't advance themselves through trainings in order to get employed.

Figure 55: Would you be ready to acquire additional qualifications to advance at work?

(Employed or self-employed people, N=2997, share of total, %)

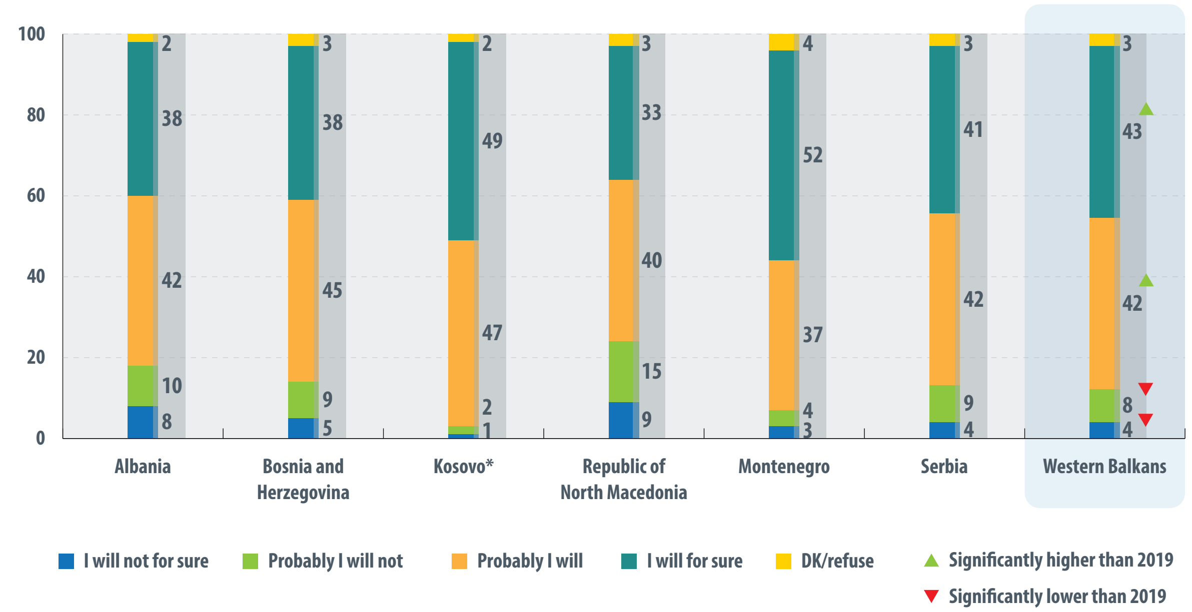


Figure 56: Would you be ready to acquire additional qualifications in order to get a job?

(Unemployed people or housewife, N=1507, share of total, %)

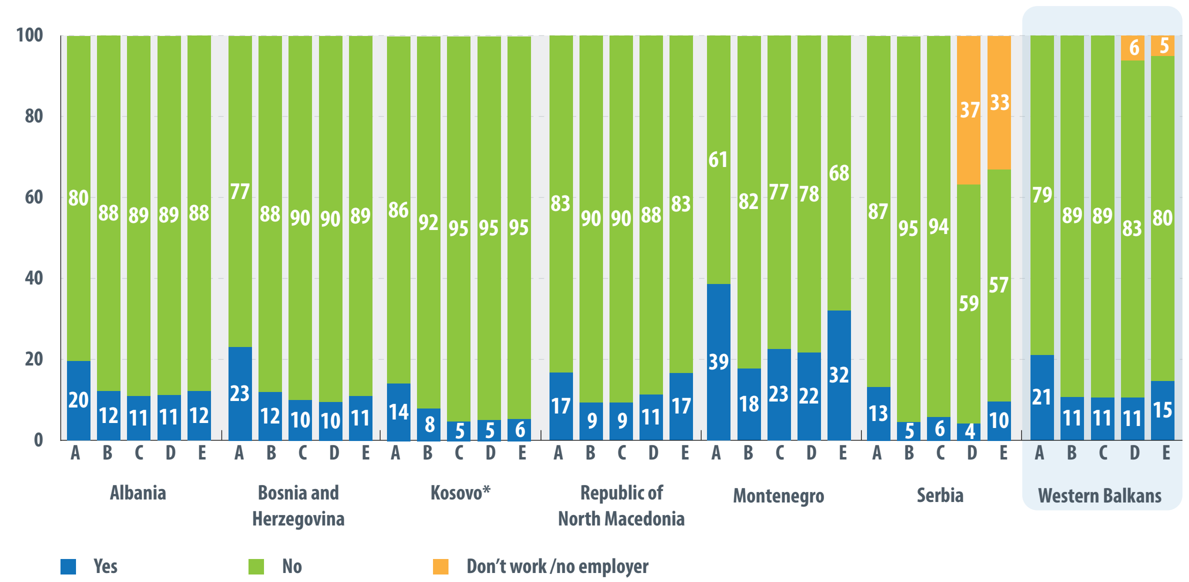
DIGITAL LITERACY AND DIGITAL SKILLS

Information technology has not only increased exponentially compared to few years ago, but its use has transcended all geographical boundaries, providing the opportunity to be informed about global developments, make purchases, communicate with each-other, or have a quicker access to governmental services. Simultaneously to digitalisation's incremental impact in everyday life, the trend of advancing one's digital skills has been increasing from year to year. Free online training, or self-study, remains the region's predominant source of learning about digitalisation, which is followed by on-the job trainings.

Western Balkans citizens are proponents and frequent users of internet, thus spending a relatively fair part of the day surfing on different internet platforms. Roughly 39% of the region's population claim to use internet for two to three hours a day, while more than one-fourth use internet platforms at least one hour each day. Respondents from Bosnia and Herzegovina are the most frequent users of internet, thus spending more than four hours on social media platforms, web browsing, etc. Kosovo* is home to the lowest share of participants who don't use internet at all (21%). The overall satisfaction with the quality of internet continues to stand at remarkably high levels, however, the public's increased awareness of digitalisation has also led to a significant expansion in the number of internet users who are concerned about data misuse by third parties.

Figure 57: 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?

Free online training or self-study; B - Training paid by yourself; C - Free training provided by public programmes or organisations (other than your employer); D - Training paid or provided by your employer; E - On-the-job training (by e.g., co-workers, supervisors, etc.)
All respondents, N=6000, share of total, % of agreement or disagreement)

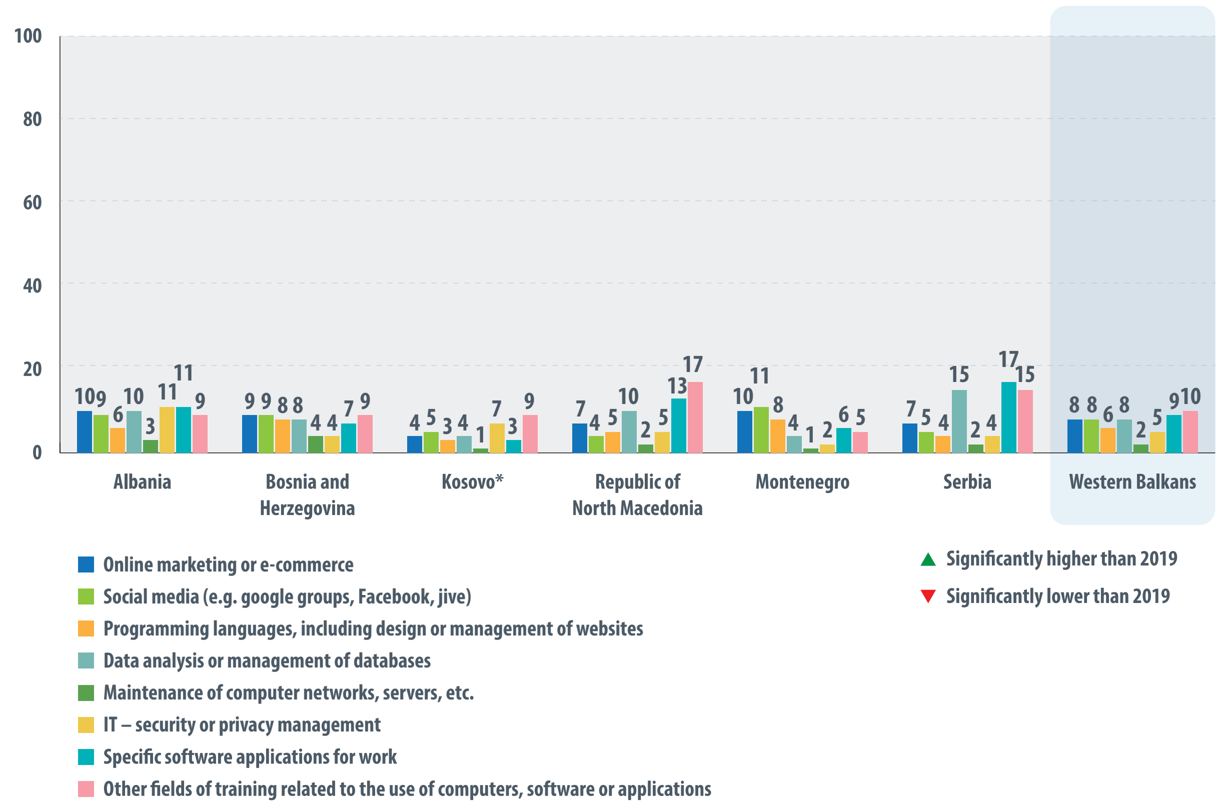


Simultaneously to digitalisation's incremental impact in the everyday life, the trend of advancing one's digital skills has been increasing from year to year. Free online training or self-study (21%), remains the region's predominant source of learning about digitalisation, which is followed by on-the job trainings (15%). Meanwhile, self-paid trainings, free trainings provided by public programmes as well as trainings provided by employers represent a source of self-development for 11% of the region's respondents. 79% of the region's participants claim to have never joined any online training in order to improve their digital skills; 89% of them claim to have neither paid for any trainings themselves, nor to have taken part in any training provided by the public programmes; while 83% of participants never participated in a training that was paid or provided by their employer.

Despite the growing awareness of the potential of information technology and the changing requirements of the labour market, no remarkable behavioural change neither from employers nor from the employees, is observed in this regard. Montenegro is home to the highest number of employees who held both online trainings (39%) and on-the-job trainings (32%) in order to enhance their digital skills. The other economies leave much to be desired in this regard, especially Kosovo*, which falls far behind other economies in engaging in IT trainings. Serbia also unfolds a negative trend, recording the second lowest percentage of employees who use trainings as a source for improving digital skills.

Figure 58: 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?

(Respondents who carried out training to improve their skills relating to the use of computers, software or applications in the last 12 months, n=1526, multiple answers, %)



This year's results indicate an unparalleled contraction of IT trainings in all eight categories; the overall number of held trainings has been more than halved during this cycle. Out of the narrow percentage of participants who undertook trainings in information technology, most of them were learning how to use computers or software (10%, down by 20 points since 2019). Specific software applications for work were the second common reason for IT trainings, thus consisting 9% of the region's population. Thematic areas such as online marketing and social media, albeit at a much smaller scale than last year, have been equally cited by participants as the field they got trained at; on the other hand, only 5% of the participants say that they were trained for privacy management.

At economy level, Republic of North Macedonia (17%) has recorded the largest number of respondents who got trained on computers and software, while participants from Serbia (17%) outnumbered other participants from the region in trainings on specific applications for work. Kosovo* again seems to not follow the same pace as the other neighbouring economies, recording a minimal percentage of specific trainings related to IT.

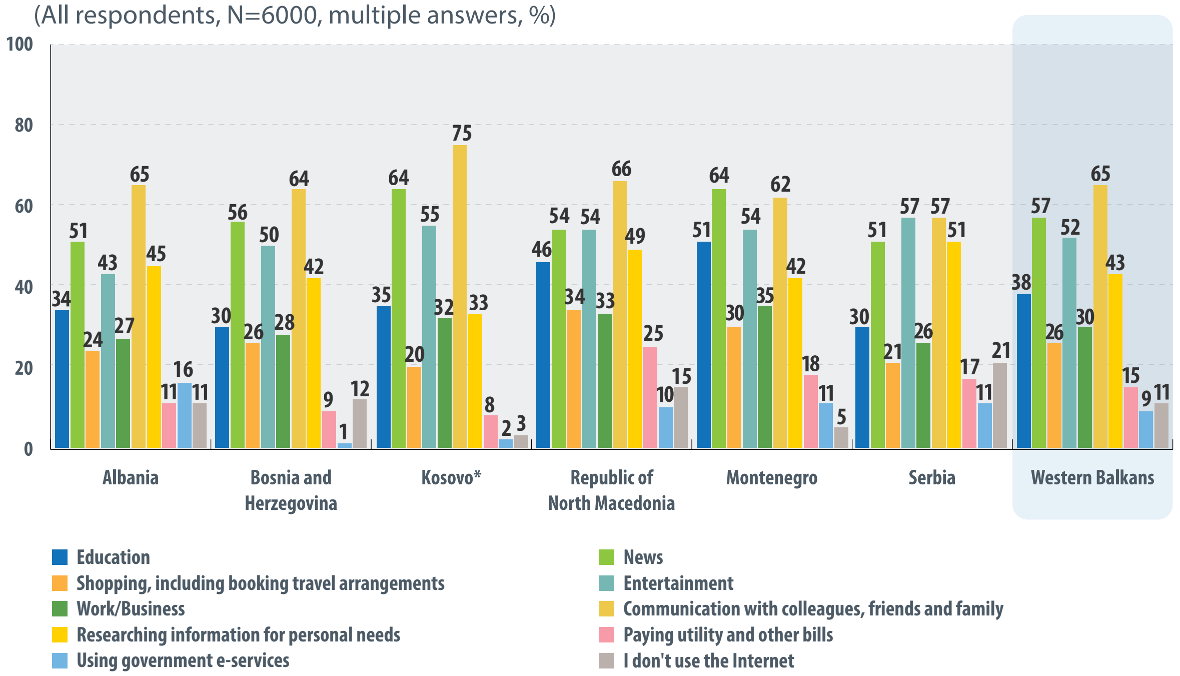
The perception of internet as an indispensable tool for everyday life is constantly being appraised by the predominant part of citizens in the region. With the proliferation of social media as well as messaging and calling apps, participants use internet overwhelmingly as a tool for communication (65%, albeit 4% less than in 2019).

In addition, news (57%) represents the second most common reason why people utilise internet, while 52% use it for entertainment. For 43% of participants, researching information for personal needs is what mostly makes them use internet. Encouragingly, internet use is also increasing in other traditionally and less popular categories such as education (38%, up eight points since 2019) and paying utility bills online (15%, up seven points since 2019).

E-government services, however, are still not perceived as efficient tools for public access by the vast majority of the population, with only 9% using them. The number of respondents not using the Internet at all has decreased by 7 points throughout the region compared to 2019, and now stands at 11%. Three-fourth of the population in Kosovo* use the Internet for communication purposes (75%), thus placing Kosovo* in a leading position in this category, while this economy and Montenegro jointly lead in the number of Internet users who go online in search of news (64%). Montenegro (35%) also leads in regards to the highest number

Figure 59: Have you used the Internet for the following?

(All respondents, N=6000, multiple answers, %)



of internet users for business purposes and education opportunities (51%). With an excellent performance on digital tools, Montenegro leads across so many categories, indicating that the economy's digitalisation push is starting to pay off. Meanwhile, citizens from Republic of North Macedonia use the Internet to shop online more than any of their regional counterparts, with 34%. At the other end of the scale stands Serbia, which shelters the highest proportion of respondents who don't use Internet (21%).

The overall satisfaction with the quality of internet remains at remarkably high levels. Some 85% of the region's population state they are satisfied with its quality, while only 15% are unsatisfied. Once again, Serbia (92%) is the leading economy when it comes to satisfied internet users, while at the other end stands again Montenegro with 25% of its citizens declaring they are dissatisfied.

Figure 60: Are you satisfied with your Internet connection?

(Those who have used Internet, N=5004, share of total, %)

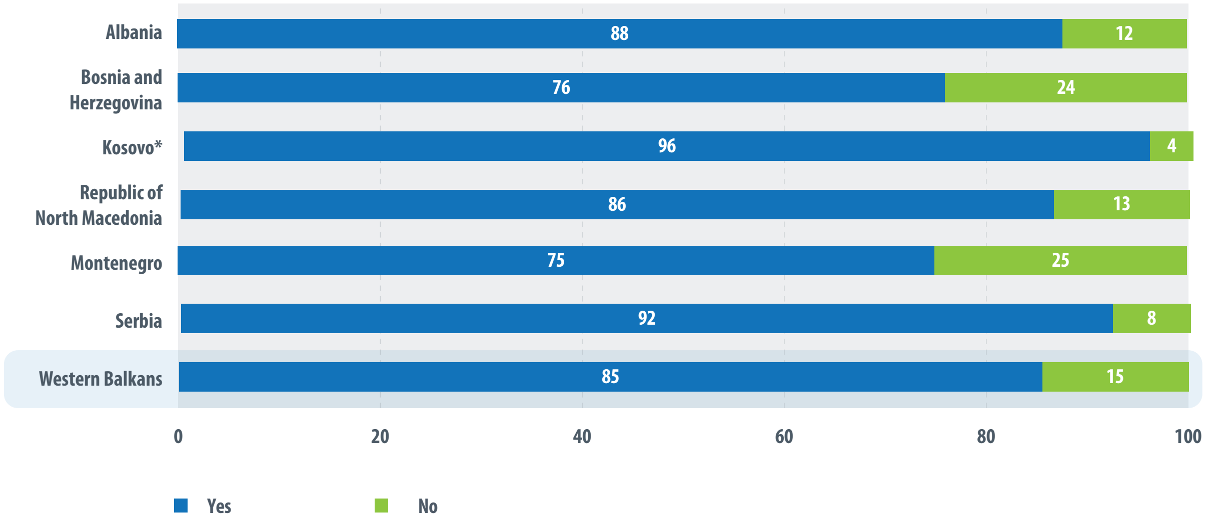
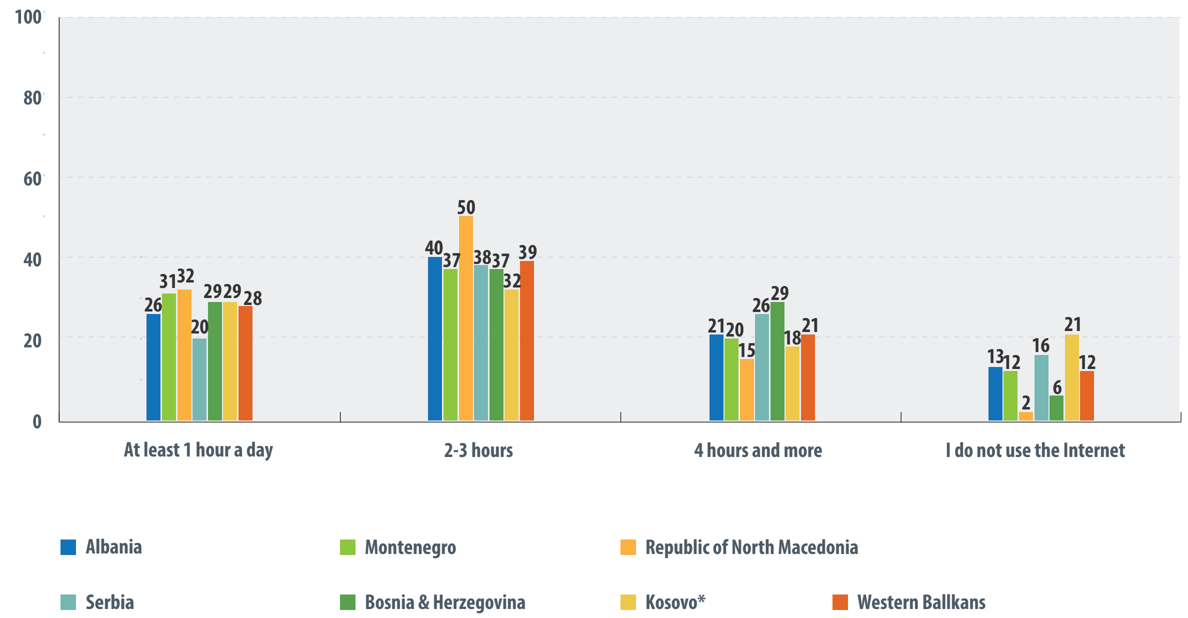


Figure 61: How many hours do you spend on Internet (e.g., on social media platforms, online shopping, web browsing, online banking, etc.)?

(Base: n=, share of total %) (Those who have used Internet, N=5004, share of total, %)

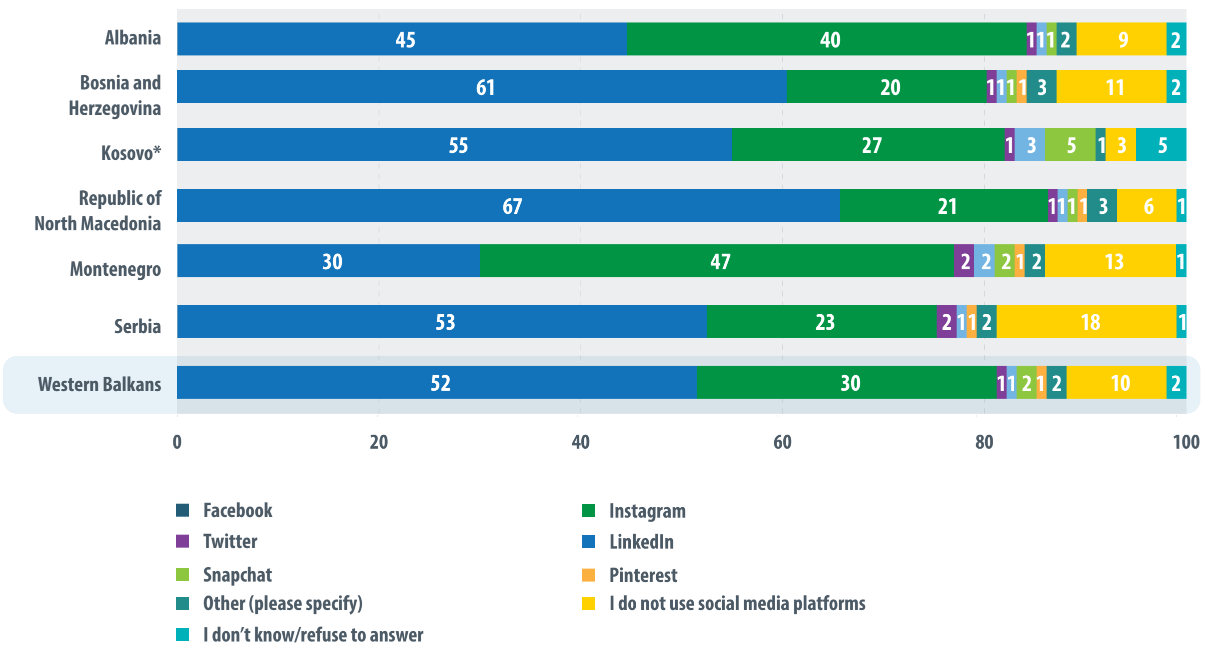


The Western Balkans citizens are frequent users of internet that spend a considerable time surfing on different internet platforms. Roughly 39% of the region's population claim to use internet for two to three hours a day, while 28% use internet platforms at least one hour each day. The percentage of internet lovers who use internet platforms more than four hours every day stands at 21%, while individuals who for different reasons don't use internet at all consists 12% of the entire population.

Republic of North Macedonia (50%) shelters the highest number of citizens who use internet two to three hours on daily basis, while respondents from Bosnia and Herzegovina (29%) are the most frequent users of internet, thus spending more than four hours on social media platforms, web browsing, etc. On the contrary, Kosovo* (21%) is home to the highest percentage of participants who claim to spend their days without using internet at all.

Figure 62: Which social media platform do you use the most?

(Base: n=, share of total %)

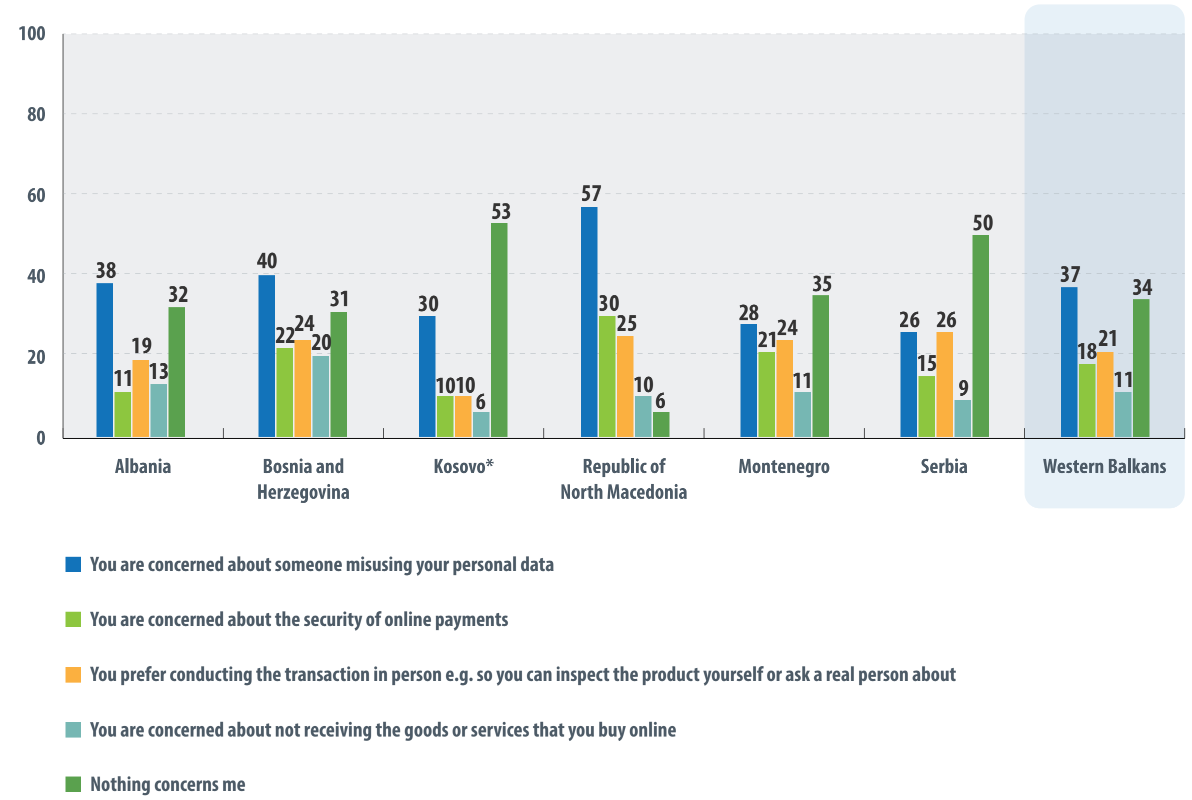


The most proliferate media platform in the region is Facebook, with 52% of participants actively using it. Instagram is ranked the second most used platform with 30%, while Twitter, LinkedIn and Pinterest are the least used by the Western Balkans, thus consisting only 1% of the entire population. The predominant part of Facebook users is from Republic of North Macedonia (67%), while respondents from Montenegro (47%) mostly spend their online time on Instagram.

The percentage of individuals who use internet for employment-oriented service is significantly low in the region, with Kosovo* citizens (3%) using it the most. On the other hand, 18% of respondents from Serbia claim they never use social media, albeit they are frequent internet users. 5 % of respondents from Kosovo* refused to answer this question, marking the highest number in the region who didn't give any response in this regard.

Figure 63: What concerns do you have, if any, about using the Internet for things like online banking or buying things online?

(Those who have used Internet, n=5004, multiple answers, share of total, %)



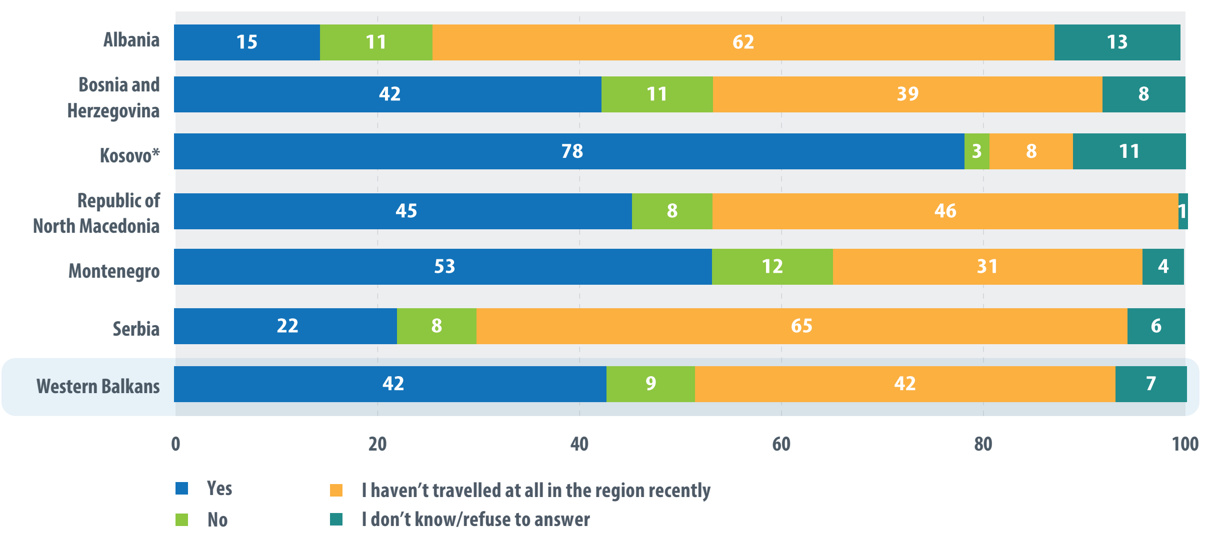
The public's increased awareness of digitalisation has led to a significant expansion in the number of internet users who are concerned about data misuse by third parties, while at the same time, the number of users who don't stress over any possibility of misuse, has also contracted. Theft of personal data have spiked by 5 points since 2019, with 37% of respondents being concerned about it. However, the number of citizens who claim to have no concerns in regards to internet security has now reached 34% of the region's population, albeit it has dropped down by 12 points since last year.

Participants who prefer to conduct in-person transactions now consist 21% of the population, a 5-point increase compared to the previous year. Concerns over security of online payments has recorded a 2-point fall in the last 12 months, thus making up 18% of all participants who don't feel confident to conduct payments on internet. On the other hand, some 11% of participants are mostly concerned about purchasing a service online and not receiving it.

Respondents from Republic of North Macedonia (57%) are predominantly concerned over the security of their personal data, while Kosovo* (53%) is the region's least preoccupied economy in terms of internet security. Serbia (26%) is home to the highest percentage of respondents who prefer to conduct transactions in person, and Bosnia and Herzegovina (20%) is the region's most concerned economy about purchasing services online and not receiving them.

Figure 64: Do you still turn off mobile data when you are roaming in the Western Balkans region?

(All respondents, N=6000, share of total, %)

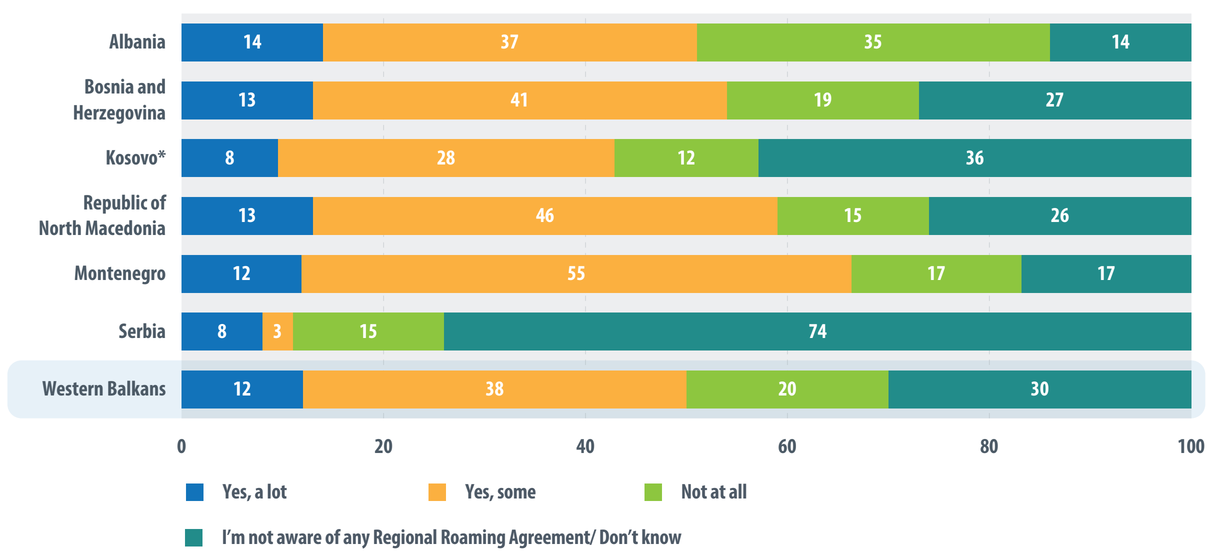


This cycle of Balkan Barometer paints an ambiguous picture of Western Balkans in terms of mobile data usage when travelling in the region. There is an equal divide between citizens who switch their mobile data off when they travel in region, and citizens who haven't recently travelled in the region. Meanwhile, the number of respondents who do not turn off their mobile data has contracted by 18 points, now consisting only 9% of the region's entire population.

Kosovo* boasts with the highest proportion of respondents who deactivate their mobile Internet when travelling in the region with 78% (up from 44% in 2019). Albania still has the lowest proportion of respondents (15%) who switch mobile data of, and at the same time it has the highest percentage of internet users who haven't travelled recently in the region, which make up 62% of Albania's population. On the other hand, Montenegro leads the region in the number of respondents who don't switch off their mobile data (12%).

Figure 65: Did the new Regional Roaming Agreement help you save money on your phone costs?

(Those who keep the Roaming on, N=527, share of total, %)

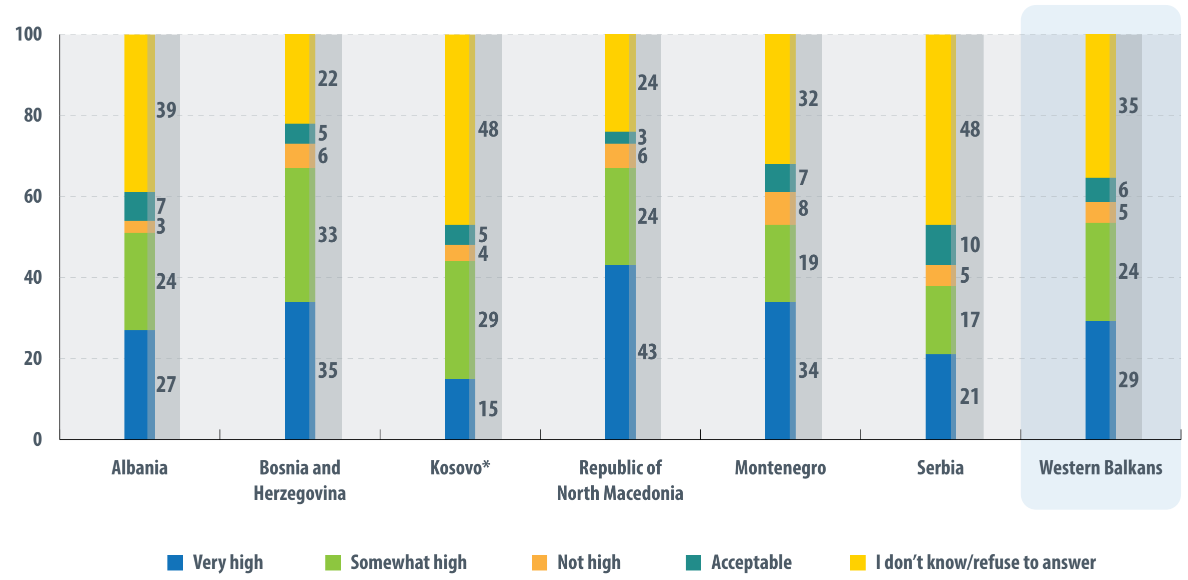


The new Regional Roaming Agreement has helped almost half of respondents to save money on phone costs (50%), while the number of users who reported no positive effect on their bill has significantly dropped to 20% (from 35% in 2019). At the same time, almost one-third of participants (30%) either were not aware of the RRA, or refused to answer the question.

At economy level, Montenegro has benefited the most from the Regional Roaming Agreement, with 67% of the population noting a positive effect on their phone bills. On the contrary, Albania with 35%, recorded the highest percentage of survey respondents who didn't note any benefit. Interestingly enough, Serbia is home to 74% of respondents who either claimed they were not aware of any Regional Roaming Agreement and its benefits, or refused to answer the question.

Figure 66: How would you consider phone costs when travelling to EU?

(All respondents, N=6000, share of total, %)

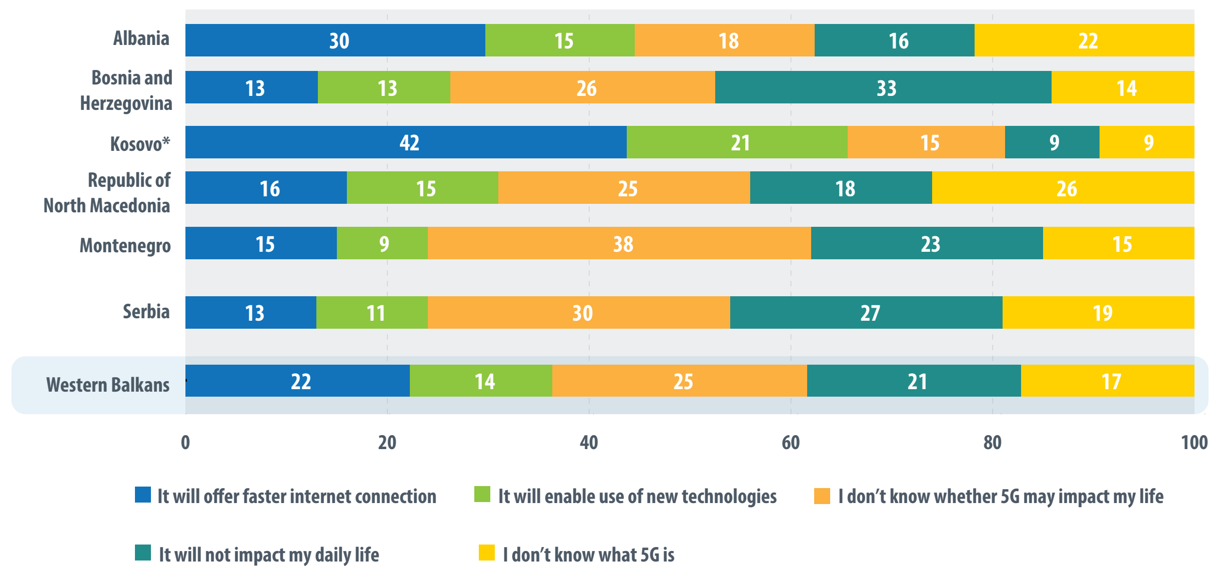


The majority of Western Balkans consider phone costs as high when travelling to the EU, thus consisting 53% of the region's population. Only 11% think that phone fees are not high or that these costs are acceptable. On the other hand, roughly one-third of participants (35%) claimed they either didn't know, or they refused to answer the question.

Bosnia and Herzegovina and Republic of North Macedonia are the region's leading critics when it comes to phone prices when travelling the EU; 68% of Bosnians and 67% of Macedonians think the prices are very high. Albeit at a low proportion, Serbia is home to the highest percentage of respondents who think that the phone fees are either acceptable or normal when travelling, thus making up 15% of the total respondents. On the other hand, roughly half of the respondents from Kosovo* and Serbia (both 48%), either said they do not have an opinion on phone costs or chose not to answer the question.

Figure 67: Will 5G impact your daily life?

(All respondents, N=6000, share of total, %)



When it comes to the benefits of using 5G as a standard technology for broadband cellular network, results reveal different attitudes of internet users in the region. While 36% are optimistic that 5G will either offer faster internet connection or will enable the use of new technologies, one-fourth of the region's population (25%) do not know whether 5G may impact their lives. Some 21% of participants don't believe 5G will actually impact their daily lives, while, interestingly enough, 17% of the region's participants don't actually know what 5G is used for.

Kosovo* is the region's most forceful cheerleader of 5G, with 63% of respondents expecting an improvement in internet connection and the introduction of new technologies. At the other end stands Bosnia and Herzegovina (33%), which is home to the highest percentage of respondents who are sceptical about the impact of 5G in their everyday life. More than one-third of participants from Montenegro (38%) have no opinion whether 5G will impact their lives, while one-fourth of participants from Republic of North Macedonia are not aware of 5G as a new technology for broadband cellular network.

ATTITUDES TOWARDS MOBILITY

Encouragingly, the number of respondents who are seriously considering leaving the economy has declined by 6 points, thus comprising roughly one-third of the entire surveyed population. Simultaneously, more than half of overall participants claim they don't have any intention to work abroad in the near future.

With a significant margin, EU remains the top destination to work for the majority of participants. Roughly one-fifth of respondents prefer the United States as the host economy to work if given the opportunity, while a small percentage claim they would work abroad, as long as their job would be somewhere in the Western Balkans region.

While emigration to one of the region's economies is not considered an option for the majority of the population, this edition of the Balkan Barometer, however, has captured a notable decline in the number of participants who would not live and work anywhere within Western Balkans.

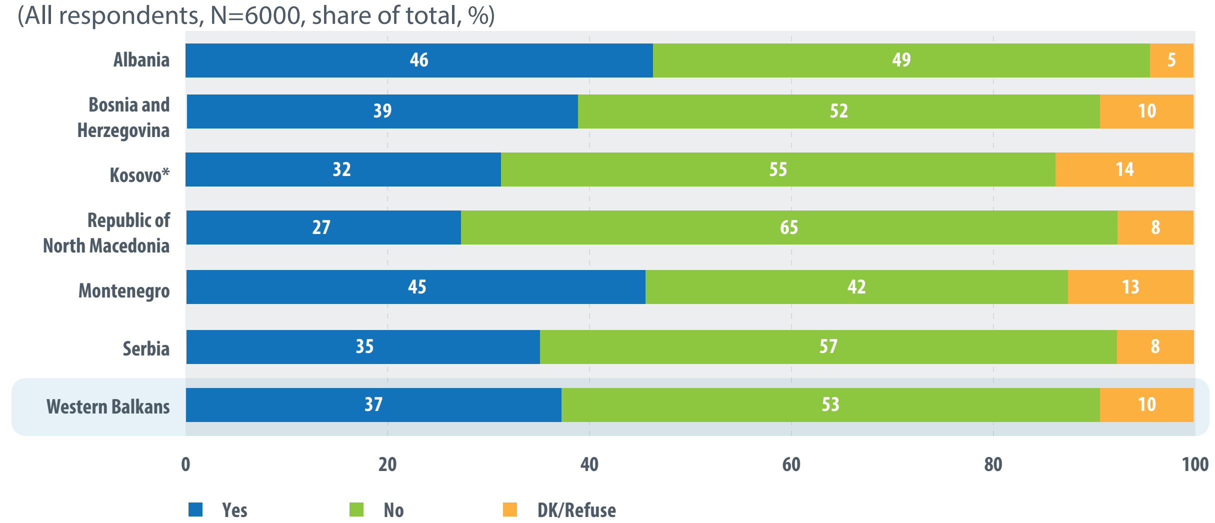
Regional travelling has significantly decreased. Apart from Albania, which leads as the top regional destination from its neighbour economies, all other economies have witnessed a significant reduction in visits from other citizens, with Kosovo* and Bosnia and Herzegovina being listed at the bottom.

Out of the citizens who travelled within the region in the last 12 months, the predominant part claimed to have gone there for visiting purposes. There is a decreasing trend in recreational travels, while on the contrary, more individuals travelled to visit friends and family.

The region continues to become increasingly open to arrivals from within the Western Balkans community, with Albania being the most welcoming economy of inward migration. Though there is a slight preference for tourists from other parts of the world, there is a growing proportion of the region's citizens who support more visitors from within the region. On the other hand, more and more participants do not express any preference between tourists from the Western Balkans and those from elsewhere in the world.

Figure 68: Would you consider leaving and working abroad?

(All respondents, N=6000, share of total, %)



Interestingly, the number of respondents who are seriously considering leaving the economy has declined by 6 points, thus comprising 37% of the entire surveyed population. Simultaneously, more than half of participants claim they do not have any intention to work abroad in the near future, while 10% refused to answer the question, or stated they did not know whether they would consider this opportunity if it knocked at their door.

At economy level, there is a notable change to report with regards to the respondents' immediate intentions to leave. Republic of North Macedonia (65%) records the highest number of participants who don't express any interest in working in any foreign economy, while citizens of Albania (46%) and Montenegro (45%) would look into job possibilities abroad. Kosovo*, on the other hand, records the largest number of participants who either did not know whether they would work abroad, or refused to answer the question.

Contrary to the number of participants who consider working abroad in the future, which has relatively declined compared to 2019, the number of citizens who are actively involved in finding an employment opportunity remains at a similar proportion as last year. The vast majority of citizens (63%) who would seriously consider working abroad if given the opportunity, have not taken any concrete measure in this regard, but are only considering it as an idea. On the other hand, almost one-fourth of participants confirmed they were getting actively informed about new opportunities; 9% were already applying to job positions abroad, and only 2% knew their exact date of departure.

Albania and Serbia share the most respondents who are currently just thinking about leaving (both 67%), while Kosovo* shelters the highest number of participants who are actively getting information about the upcoming opportunities. Albania respondents, on the other hand, are the most engaged in concrete measures towards employment opportunities, with 11% of its population applying to open vacancies abroad. Respondents who are finalising the last administrative issues make up 4% of Republic of North Macedonia's population, while the highest number of respondents who have everything set up and know the exact date of departure live in Albania and Republic of North Macedonia, both with 4 %.

Figure 69: In what phase of consideration are you?

(Those who consider leaving and working abroad, n=2231, %)

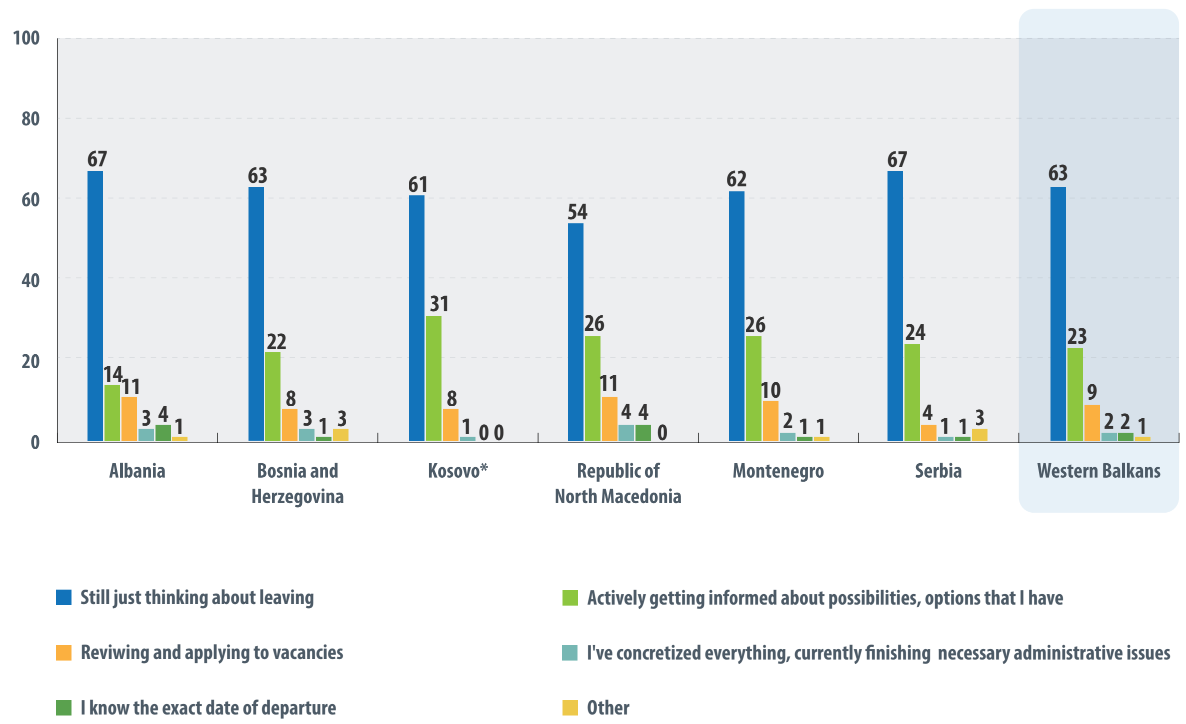
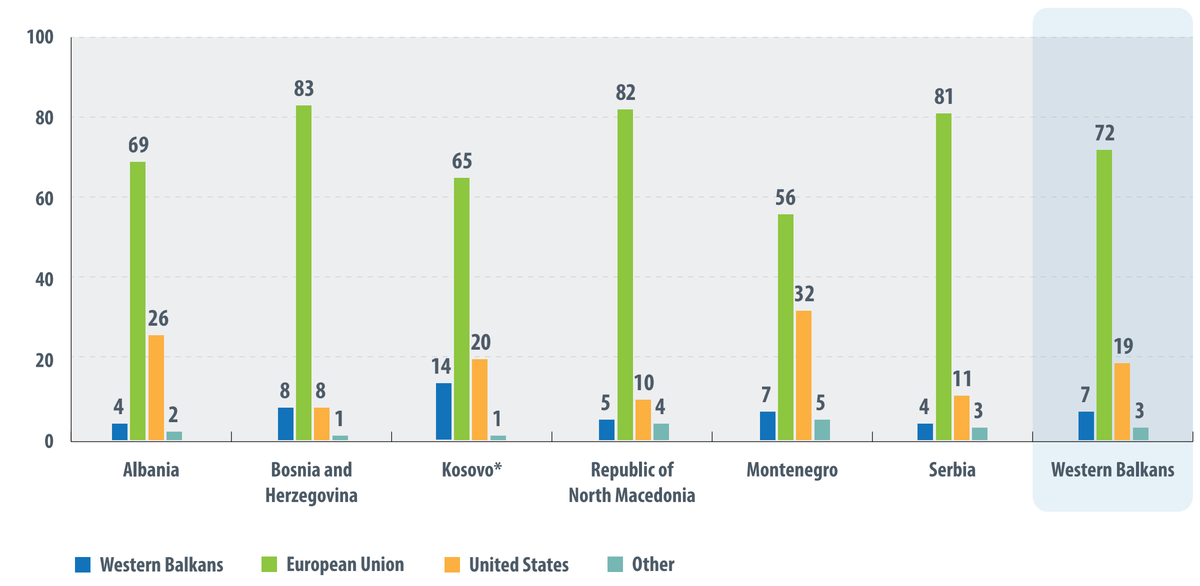


Figure 70: Where do you consider living and working abroad?

(Those who consider leaving and working abroad, n=2231, %)



Emigration from the Western Balkans remains the most preferred choice of citizens in the region. With a significant margin, EU remains the top destination to work for 72% of all survey participants. Roughly one-fifth of respondents chose the United States as the preferred country to work if given the opportunity, while 7% claimed they would work abroad, as long as their job would be somewhere in the Western Balkans. Only 3% of respondents would go to another economy that was not specified in the survey.

Bosnia and Herzegovina (83%), Kosovo* (65%) and Serbia (81%) are the most proponent economies of the European Union in terms of employment, while Montenegro is the region's most forceful leader in working in the United States, thus consisting roughly one-third of its entire population, but interestingly enough, 7% of Montenegrins also expressed their preference to work abroad, only if their new job would be somewhere in the region.

While emigration remains a joint attitude for the predominant part of citizens, living and working in one of the region's neighbour economies is not considered an option for the majority of population. This edition of the Balkan Barometer, however, has captured a notable decline in the number of participants who would not live and work anywhere within the Western Balkans, (77%, down from 82% in 2019).

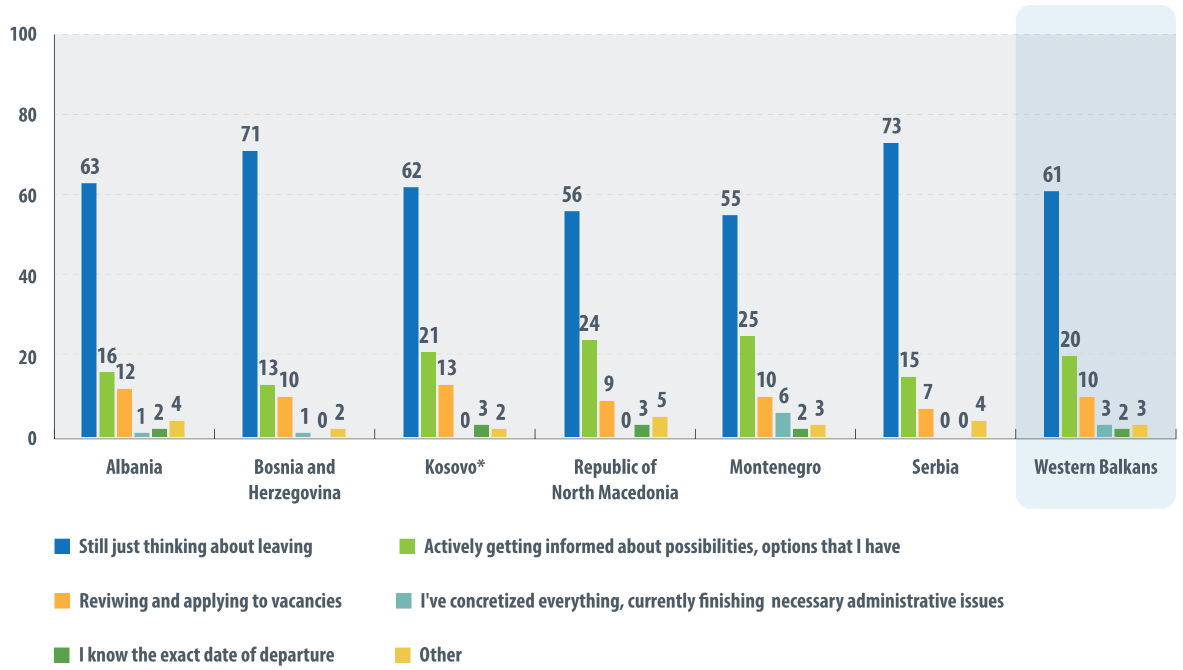
From the lenses of each economy individually, respondents from Serbia are the strongest opponents of working and living in another economy within the region, thus consisting the vast majority of the population (90%). On the other hand, the most preferred regional economy to work and live in is Republic of North Macedonia, which was the first destination for 26% of qualified employers from Montenegro. 12% of respondents from Bosnia and Herzegovina admitted they would work in Serbia with their current education and professional background, while 16% of citizens from Kosovo* were not sure whether they would live and work somewhere in the Western Balkans, if given the opportunity. The number of participants who chose other regional economies as acceptable to live and work in remains insignificant, with some of the economies not even being recorded as a response from any of the respondents.

Figure 71: Would you consider living and working in another place in the Western Balkans region having your academic and professional qualifications recognised in all WB6? If yes, where?

(All respondents, N=6000, multiple answers, %)

Figure 72: In what phase of consideration are you?

(Those who consider leaving and working in the Western Balkans region, n=790, share of total, %)



As with emigration from of the Western Balkans, there has been an increment in the number of most prospective regional emigrants who are still just thinking about moving (61%, from 59% in 2019). One-fifth of citizens (20%) are actively looking into new options in the region, 10% are presently applying for jobs, while 3% are awaiting administrative clearance to move (down from 4% in 2019). As it is with migration in general, only 2% know exactly when they are departing.

Serbia (73%) has recorded the highest number of potential emigrants who are currently only thinking about leaving, while Montenegro (25%) shelters the highest number of respondents who are constantly getting informed about open possibilities. Kosovo* (13%) tops the list of Western Balkan economies, whose respondents have taken concrete steps and are currently applying to open vacancies, while some 3% of citizens from Republic of North Macedonia already know their exact date of departure.

While the previous edition of the Balkan Barometer recorded roughly half of the population who didn't travel anywhere in the region in the past 12 months, this cycle reports a remarkable increase in the number of citizens who haven't visited any city in the neighbouring economies since last year (66%, from 54% in 2019).

Apart from Albania (14%), which leads as the top regional destination from its neighbouring economies, all the other economies have witnessed a significant reduction in visits from other citizens, with Kosovo* and Bosnia and Herzegovina (both at 4%) being listed at the bottom. The number of respondents from Serbia who have not travelled anywhere in the region within the last 12 months, has reached its zenith at 86% (from 67% in 2019), while at the other end of the scale stands Kosovo* (29%) whose citizens have travelled the most, thus showing a distinguished preference for Albania as their most frequently visited economy. Serbia is the most frequent destination for respondents from Montenegro with 29%, while Montenegro and Republic of North Macedonia are mostly visited by (17% and 18%, respectively) citizens from Kosovo*.

Figure 73: Did you travel anywhere in the region in the past 12 months? If yes, where?

(All respondents, N=6000, multiple answers, share of total, %)

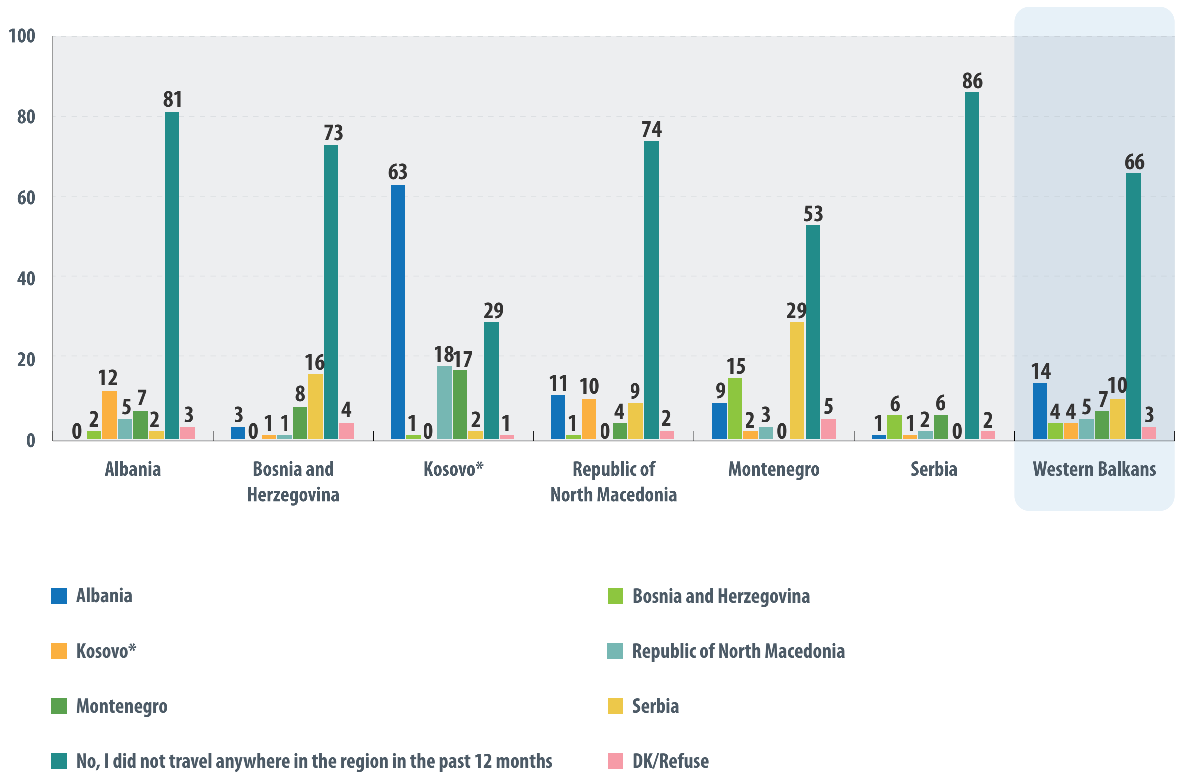


Figure 74: What was the purpose of your travel?

(Those who travelled in the region, n=1875, multiple answers, %)

Out of participants who travelled within the region in the last 12 months, the predominant part claim to have gone there for visiting purposes, thus consisting 64% of the entire population. This edition of Balkan Barometer noted a decreasing trend in recreational travels, which were halved this year (37% from 60% in 2019), while on the contrary, more individuals travelled within the Western Balkans to visit friends and family (64% from 56% in 2019.)

Some 16% of overall travels were conducted for business and professional reasons, and only 1% of citizens who visited economies in the region specified other reasons as the main cause for their travel. Kosovo* (89%) is home to the highest number of respondents who travel to visit friends and families, while the majority of respondents from Bosnia and Herzegovina (60%) cited tourism as the main reason for their regional trips.

When asked what will happen with participants' plans for travel in the next twelve months, the vast majority don't have a clear picture in this regard. The proliferate proportion of the region's respondents (81%) claim they don't know what are their plans for travel in the future, respondents from Serbia being the most indecisive (89%). Kosovo* (13%) is home to the highest percentage of citizens who will reduce their travels, while 8% of citizens from Montenegro plan to change their trips from international to regional travels and another 9% of Montenegro's population plans to travel more domestically in the next 12 months.

Roughly two-thirds of participants in the Western Balkans (76%) said they did not know whether they would travel more frequently if they were equipped with a valid identification card, with Serbia leading the list (90%). On the other hand, 42% of citizens from Kosovo* confirm that they would travel more often if their ID was valid, while Montenegro is the region's least excited economy to travel within the region, even if its citizens were equipped with an ID card that would enable them to travel freely.

Figure 75: What will happen with your travels in the next 6-12 months?

(All respondents, N=6000, share of total, %)

Figure 76: Would you travel more frequently if you could travel across the region with a valid ID card?

(All respondents, N=6000, share of total, %)

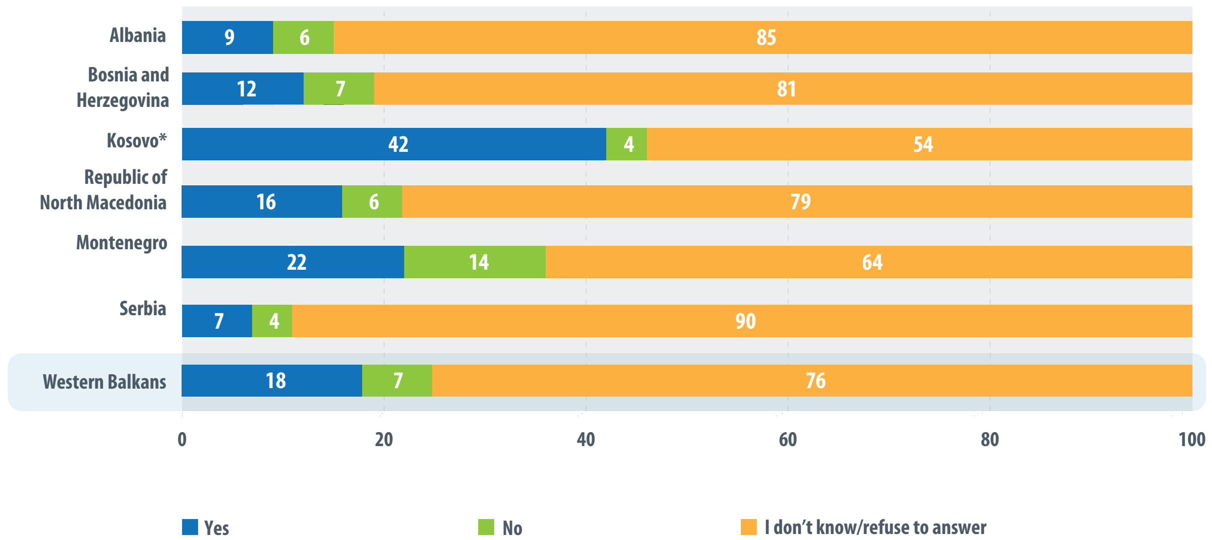
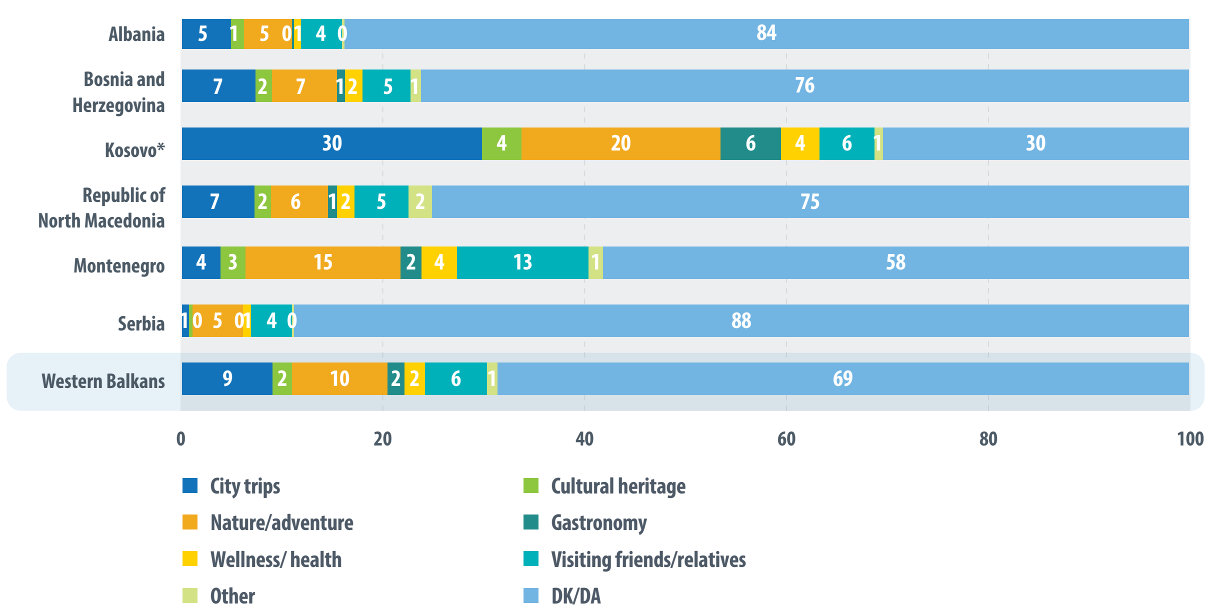


Figure 77: What type of holidays are you planning in 2021 and if yes, what is your main interest?

(All respondents, N=6000, share of total, %)



While the vast majority of the participants do not know whether they will go on holiday (69%), a little less than one-third of citizens (31%) have already planned their trip for 2021. Some 10% are planning to take nature or adventure trip, 9% of them plan to visit new cities, and 6% are looking forward to visiting their family and friends.

The highest number of participants who are unsure whether they will go on holiday during 2021 come from Serbia (88%), while on the other side of the coin stands Kosovo*, which has recorded the lowest number of respondents who don't know whether they will go on vacation this year, thus reaching 30% of its entire population. Kosovo* at the same time is home to the largest proportion of individuals who are planning to visit new cities (30%) and to citizens who have planned to take an adventure trip (20%), while respondents from Montenegro (13%) plan to visit their friends and family in 2021.

The region continues to become increasingly open to arrivals from within the Western Balkans community, with 42% of respondents now supportive of inward migration from another regional economy (+2 compared to 2019). This year's survey also sees a 5-point drop in the rank of respondents who are hostile to the idea (10%). Overall, since 2016, the number of survey participants supportive of regional arrivals has grown by 14 points and represents a promising development in regional migration.

Albania is the region's most welcoming economy with 49% of respondents supportive of incoming migration from within the region. Meanwhile, Montenegro records a 22-point drop in the number of participants who are open to new arrivals, thus bouncing from the epithet of the region's most welcoming economy to the region's most inhospitable one (making up 36% of the population, from 58% in 2019). Serbia and Kosovo* shelter the largest concentration of neutral respondents in the Western Balkans, both with 46%.

Though a slight preference for tourists from other parts of the world was noted, there is a growing proportion of the region's citizens who support more visitors from within the region (61% vs. 59%). On the other hand, participants who do not express any preference between tourists from the Western Balkans and those from elsewhere in the world comprise 60% of the entire population.

Figure 78: What do you think about people from other parts of the region coming to live and work in your economy? Is it good or bad for your economy?

(All respondents, N=6000, share of total, %)

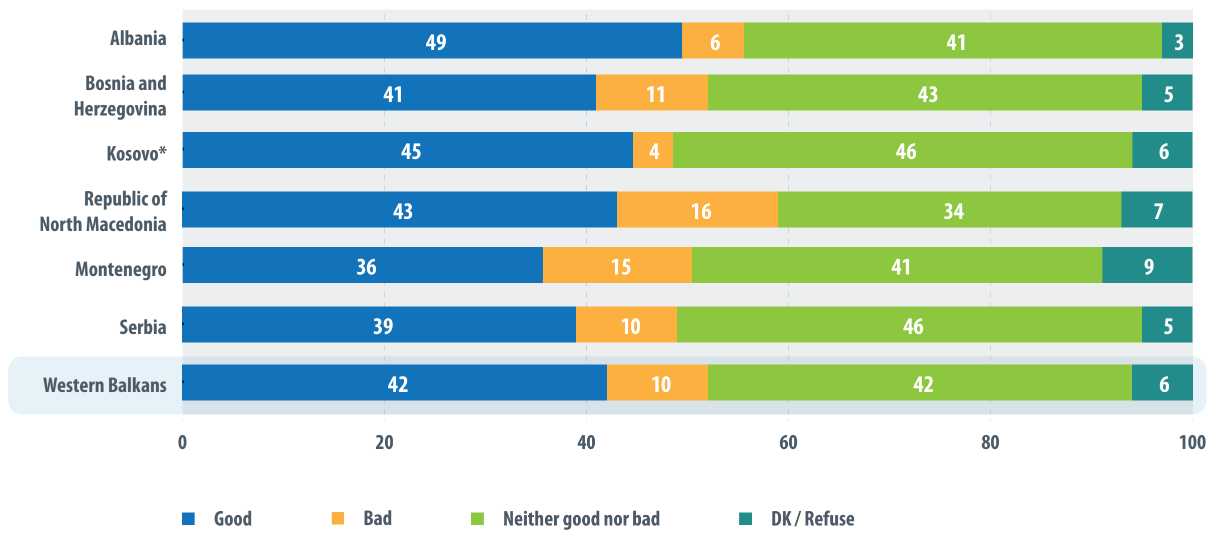
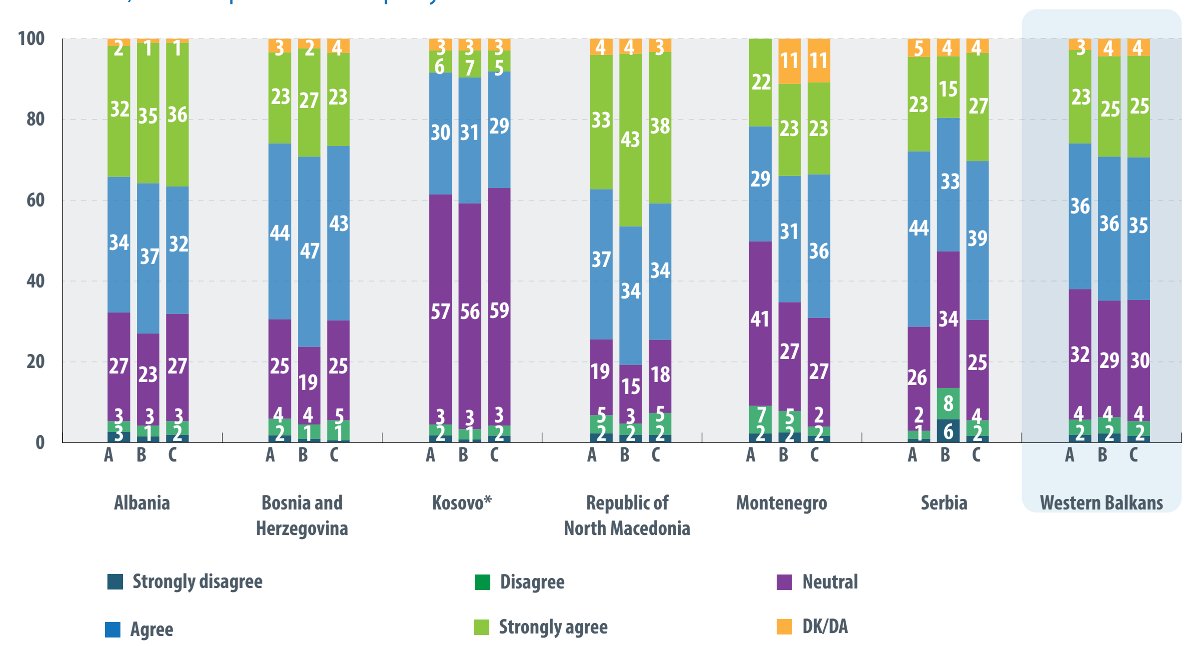


Figure 79: Which visitors would you like to have more in your economy?

A) I support opening up my community to visitors/tourists from the region (Albania, Bosnia and Herzegovina, Kosovo*, the Republic of North Macedonia, Montenegro, Serbia). B) I would prefer visitors from other parts of the world. C) I would prefer both equally.



Respondents from Republic of North Macedonia made a distinction between tourists from within the region and tourists from other parts of the world, thus expressing a stronger preference for international tourists (70% vs. 77%), while more than half of survey participants from Kosovo* have taken a neutral attitude towards the origin of their tourists. Some 14% of respondents from Serbia are hostile to the idea of international tourists, while 9% of Montenegrins are not great fans of tourists from the Western Balkans.

ATTITUDES TO SOCIAL INCLUSION OF VULNERABLE GROUPS

Empathy for the socially excluded is not universal and unfortunately, it depends on their identity as well as membership of a particular group. Inclusion for the Roma community, however, is becoming an economic as well as a moral necessity – with negative demographics at work alongside ever-growing outward migration, the region can ill-afford to continue alienating another source of previously dormant labour. Most importantly, though, it will improve the Roma's access to education, quality housing, healthcare and other essential services.

Though this cycle of the Barometer records a more comprehensive empathy for the socially exclusive groups, affirmative actions are still considered far fonder for some groups than for others, with Roma once more pushed to the economic and social margins. Employment measures for people with disabilities are most likely to be supported by citizens, as opposed to displaced persons or refugees, or members of the Roma community.

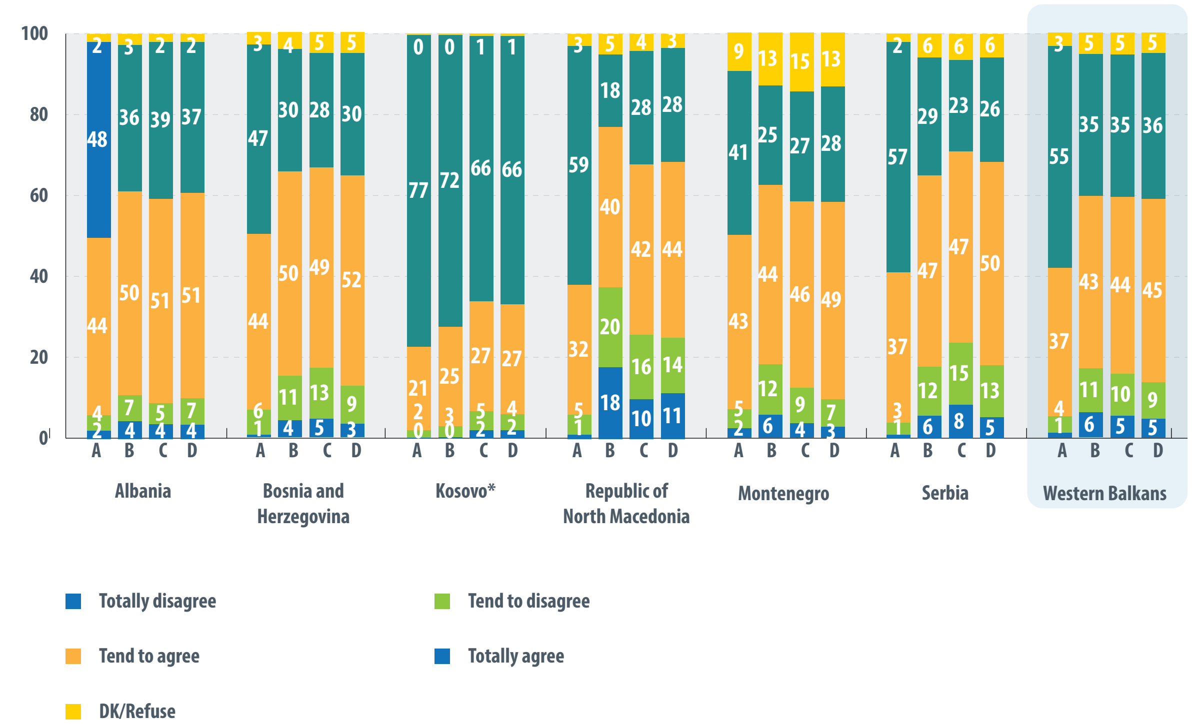
The disparity between different groups of marginalised people is mostly witnessed in Republic of North Macedonia, with the vast majority of citizens supporting affirmative action in employment for people with disabilities, as opposed to fewer participants in favour of employment measures for refugees, Roma people and other minority groups. It is noteworthy that Republic of North Macedonia is also home to what is estimated to be the region's largest Roma community proportionally to the whole population.

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

Looking at the social context, the majority of the surveyed population would not be comfortable with marrying, or having their children marry a Roma person. Kosovo* is the region's outliner which shares a contradicted overview. While Kosovo* leads the region in terms of support to social inclusion of marginalised groups through governmental affirmative measures in employment and housing, there is an opposite attitude when it comes to personal affirmative measures for the excluded ones. Four-fifths of respondents from Kosovo* are most likely to reject marriage with a Roma, one-third are against taking their children to a school where there are Roma pupils, while 40% would not buy any product from a Roma vendor. for tourists from other parts of the world, there is a growing proportion of the region's citizens who support more visitors from within the region. On the other hand, more and more participants do not express any preference between tourists from the Western Balkans and those from elsewhere in the world.

Figure 80: 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?

Free online training or self-study; B - Training paid by yourself; C - Free training provided by public programmes or organisations (other than your employer); D - Training paid or provided by your employer; E - On-the-job training (by e.g., co-workers, supervisors, etc.)
All respondents, N=6000, share of total, % of agreement or disagreement)



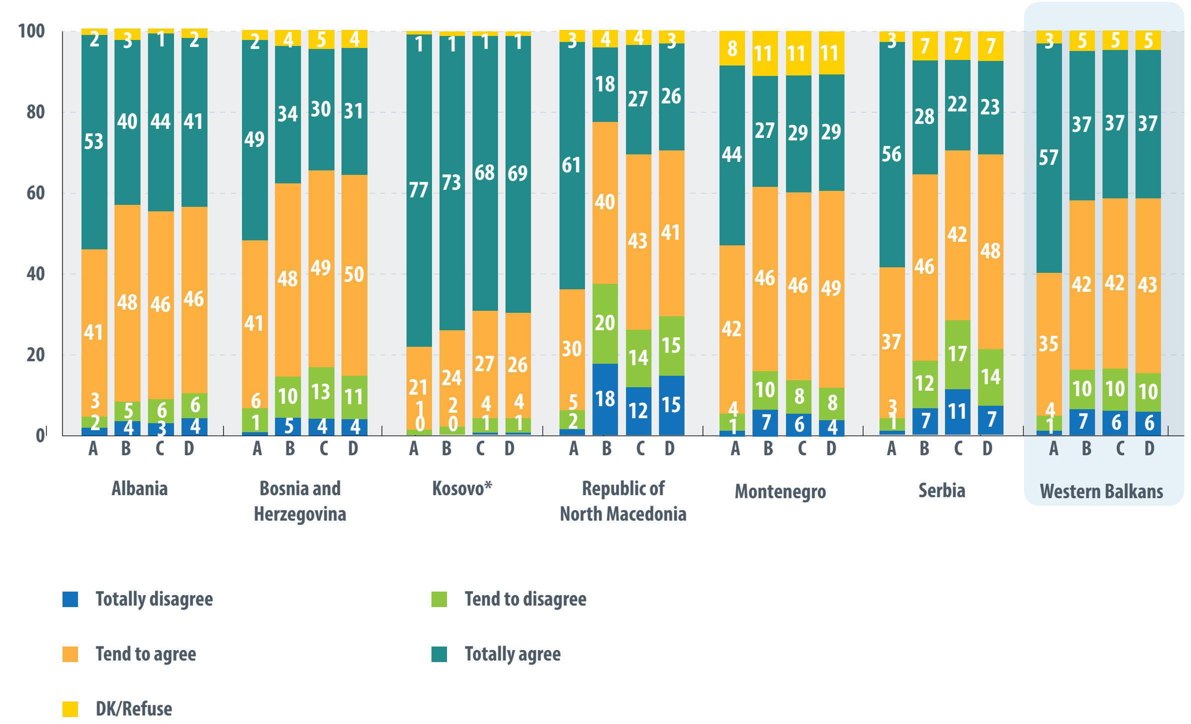
As opposed to the previous cycle of the Barometer, this year registers a more comprehensive empathy for the socially excluded groups. Though with significant margins, citizens are more likely to support affirmative actions in employment for people with disabilities as opposed to displaced persons or refugees, or members of the Roma community. Some 92% feel that persons with disabilities should be given special privileges when seeking a job in the public sector, against 78% (from 72% in 2019) who feel the same care should be afforded to internally displaced persons and refugees. 79% of citizens (from 75% in 2019) feel those privileges should be extended to Roma and 81% (from 76% in 2019) favour affirmative employment action for other minorities.

The disparity between different groups of marginalised people is mostly witnessed in Republic of North Macedonia, with the vast majority of citizens supporting affirmative action in employment for people with disabilities (91%), as opposed to 58% of participants in favour of employment measures for refugees, 70% favouring Roma minorities and 72% supporting employment actions for other minority groups. It is noteworthy that Republic of North Macedonia is also home to what is estimated to be the region's largest Roma community proportionally to its whole population. On the other hand, Kosovo* is placed best in the region, with the most comprehensive empathy towards the excluded groups in terms of promoting opportunities for equal access in the labour market.

Figure 81: The Government should do more in order to ensure better housing conditions for persons belonging to the groups listed below?

A – Persons with disabilities (including persons with special needs); B – Displaced persons or refugees; C – Roma population; D – Other minorities.

All respondents, N=6000, share of total, % of agreement or disagreement)



Regarding affirmative housing measures for marginalised groups, results show the same public perception - with slightly bigger opposition- for employment measures taken by the government in this regard. Some 92% support public housing initiatives for disabled persons, against 79% who do so for internally displaced persons, refugees and Roma community.

As with access to jobs, there is little substantive change in results compared to last year. This remains true at economy level as well. Respondents from Republic of North Macedonia are the most forceful objectors of affirmative housing measures for all the marginalised groups, with the exception of people with disabilities. 38% of Republic of North Macedonia's population do not support housing intervention for displaced persons and refugees, 26% do not support these measures for Roma community, and 30% oppose housing benefits for other minorities; an extent well above the regional average. As with employment, respondents from Kosovo* are most likely to support equitable government intervention across all categories surveyed.

Unlike in previous years, when results indicated a narrowing gap of social exclusion among specific groups, unfortunately, the last two years' surveys see it widen once more, thus indicating that more effort should be made in this direction. Governments should undertake concrete measures which could directly benefit the excluded groups in the society and at the same time, increase public awareness of social inclusion.

There is a clear and present pattern of prejudice in how the Roma community is perceived across the Western Balkans and this continues to have a hugely detrimental impact on their ability to gain access to critical public services and enjoy economic and social opportunities. Some 69% of the citizens would be friends with someone who is from Roma community; roughly half of the population would consider renting housing to Roma (52%), and 70% would work with a colleague from Roma community.

Meanwhile, one- third would not work for a Roma employer (30%) and the same number would not be comfortable buying products made by Roma. Looking at the social context, an incredible 68% of the surveyed population would not be comfortable with marrying, or having their children marry, a Roma person, while slightly more than a quarter (26%) don't want their children sharing a classroom with a student from the Roma community. More than one-third (33%), meanwhile, would not consider inviting Roma people to their homes.

Figure 82: How likely is that you are comfortable with (Results for the Western Balkans region):

All respondents, N=6000, share of total, % of agreement or disagreement)

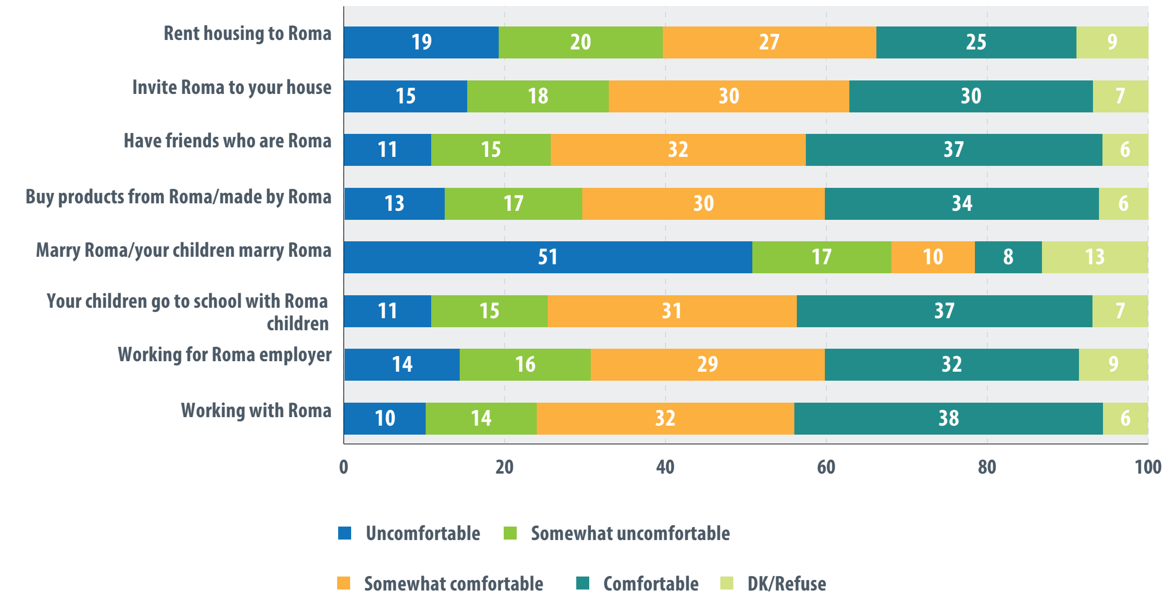
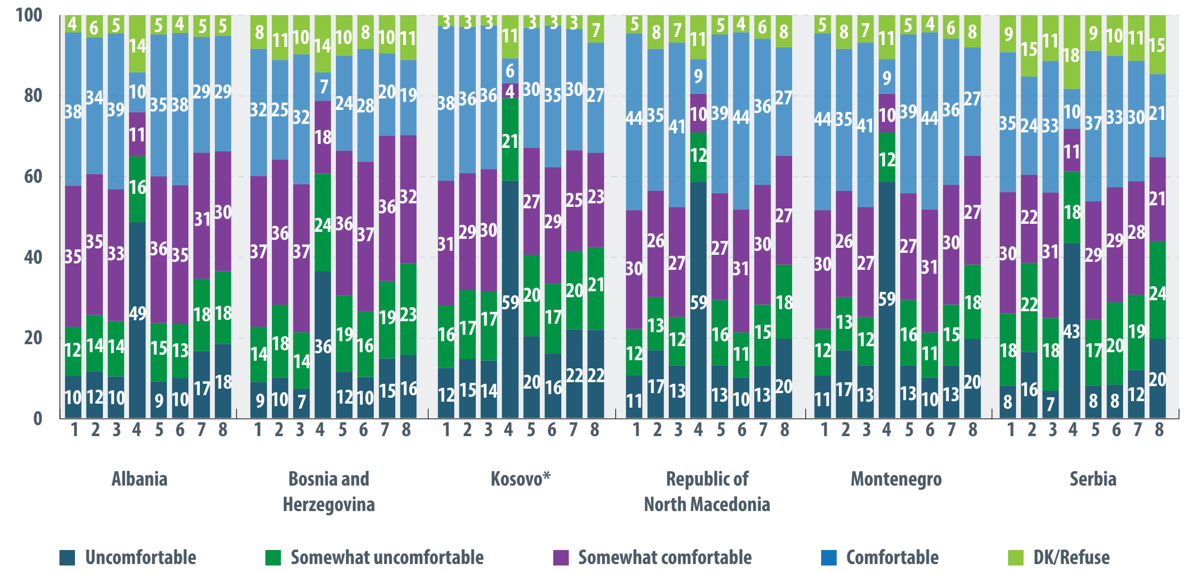


Figure 83: How likely is that you are comfortable with (Results by economies):

1. – working with Roma: 2. – working for 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

All respondents, N=6000, share of total, % of agreement or disagreement)



When disassembling results at the level of individual economies, the survey records a comprehensive Roma exclusion; this uncomfortable perception is shared by all economies in the Western Balkans. However, Kosovo* is an interesting case in the region because of the results explained below.

While Kosovo* leads the region in terms of support to social inclusion of marginalised groups through governmental affirmative measures in employment and housing, there is an opposite attitude when it comes to personal affiliation towards Roma. Some 80% of respondents from Kosovo* are most likely to reject marriage with a Roma, while 31% are against taking their children to a school attended by Roma pupils, 28% would not feel comfortable working with a Roma colleague, and 40% would not buy any product from a Roma vendor. On the other hand, Serbian respondents are the most uncomfortable with the idea of working for Roma employer (38%) as well as with renting their house to a Roma tenant (44%).

PERCEPTIONS OF TRADE

Encouragingly, a growing number of respondents, support strengthening of commercial ties within the Western Balkans region, though this number hasn't changed compared to last year. As it has become customary, the majority of citizens expect improved conditions for costumers as a result of the entry of foreign companies into the domestic market, while one-fifth are sceptical about the perceived benefits.

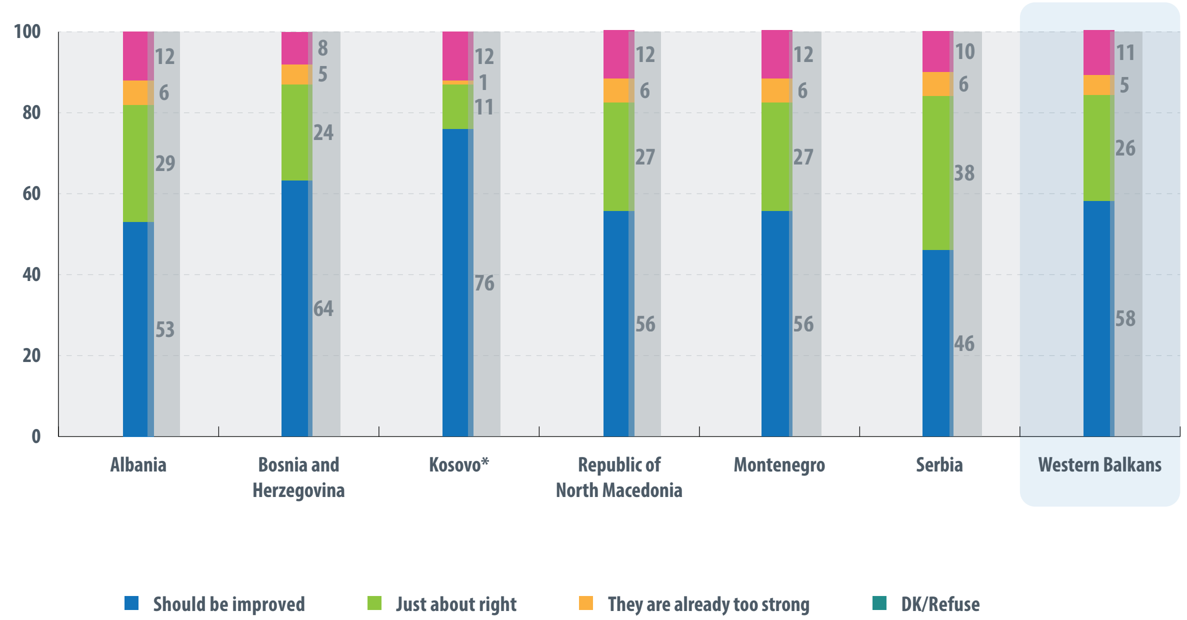
Since the inception of the Balkan Barometer, the EU is perceived as the most preferred trading partner in the region, with two-thirds of total respondents advocating for further improvement of trade and investment links between their governments and this economy. Roughly one-third of participants are proponents of strengthening trade and investment relations with Russia, more than a third view Turkey as the potential biggest trading partner for the Western Balkans region, while interestingly enough, there is an increasing regional interest in the enticing Chinese market.

Encouragingly, domestic goods and services are increasingly being considered as competitive products compared to the goods imported from other Western Balkan economies and the EU. Respondents from Serbia continue to convincingly lead the region in product confidence, both against competitors from the region and well as from the EU. On the other hand, respondents from Kosovo* are least likely to consider domestic products competitive against regional (75%) and EU (68%) competition.

Domestically sourced food and beverages remain the first choices for the majority of citizens in the Western Balkans; however, there is a decline in the number of domestic products proponents. Meanwhile, food products from Western Europe are considered as the least favourite goods for the Western Balkans, compared to the domestic and regional ones.

Figure 84: How would you describe commercial and trade links of your economy with the Western Balkans region?

All respondents, N=6000, share of total, % of agreement or disagreement)



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Again, a sizable majority of the region's citizens expect the entry of foreign companies into the domestic market to improve conditions for consumers (68%), while 21% are sceptical about the perceived benefits.

Albania (76%) is again home to the highest concentration of respondents who expect a positive outcome from the entry of foreign companies, while the least enthusiastic economy is Bosnia Herzegovina, with 28% of the respondent population unhappy at the prospect of foreign corporations. Meanwhile, roughly one fourth of respondents from Kosovo*, however, chose to not answer this question.

Figure 85: Do you agree that, in general, entering of foreign companies in the market of your economy will improve choice and decrease prices for consumers?

All respondents, N=6000, share of total, % of agreement or disagreement)

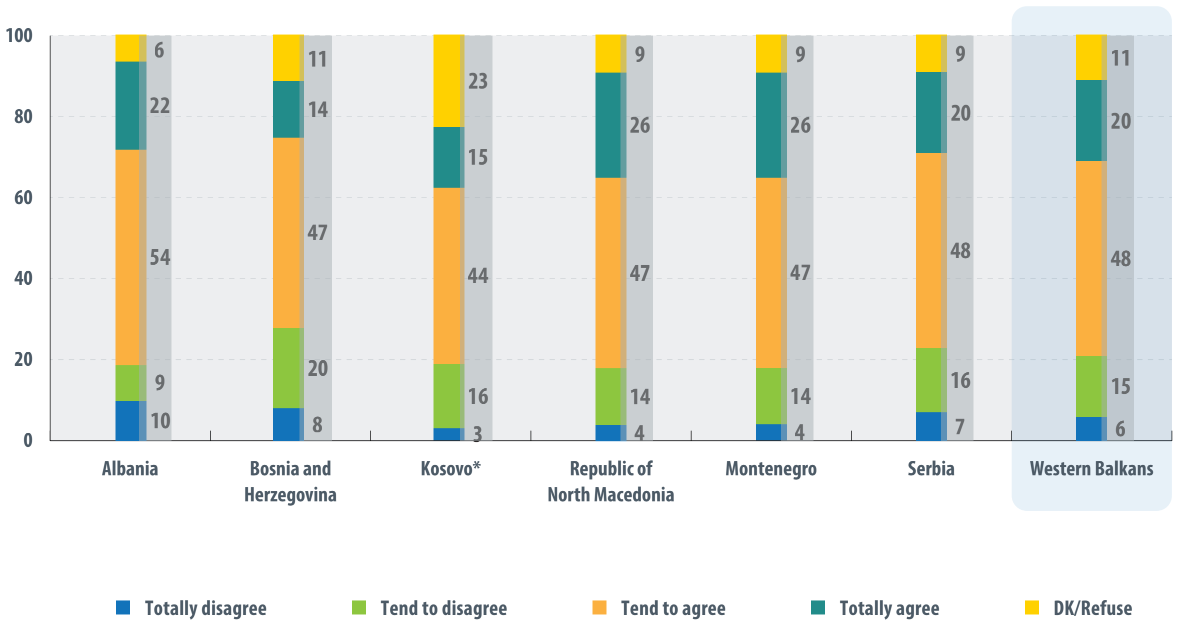


Figure 86: Which economies/regions do you think your Government should further improve trade and investment relations with?

All respondents, N=6000, share of total, % of agreement or disagreement)

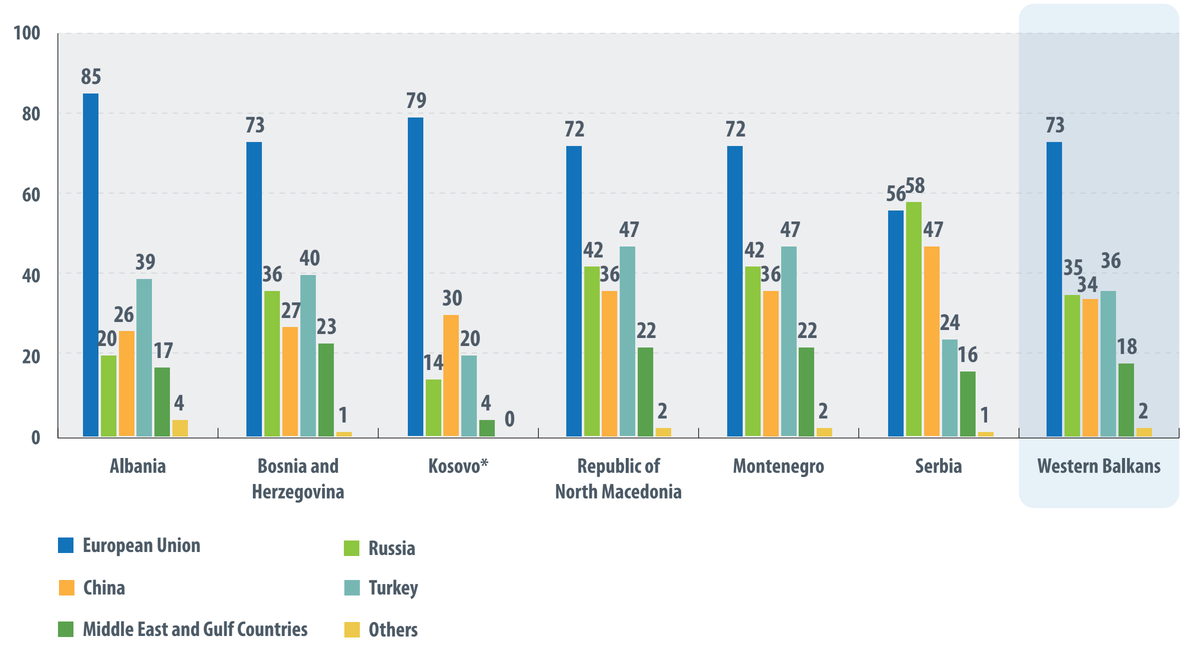


Figure 87: Do you agree with the following statements?

A – Goods and services of my economy can compete well with products and goods from other Western Balkan economies B – Goods and services of my economy can compete well with products and goods from the EU

All respondents, N=6000, share of total, % of agreement or disagreement)

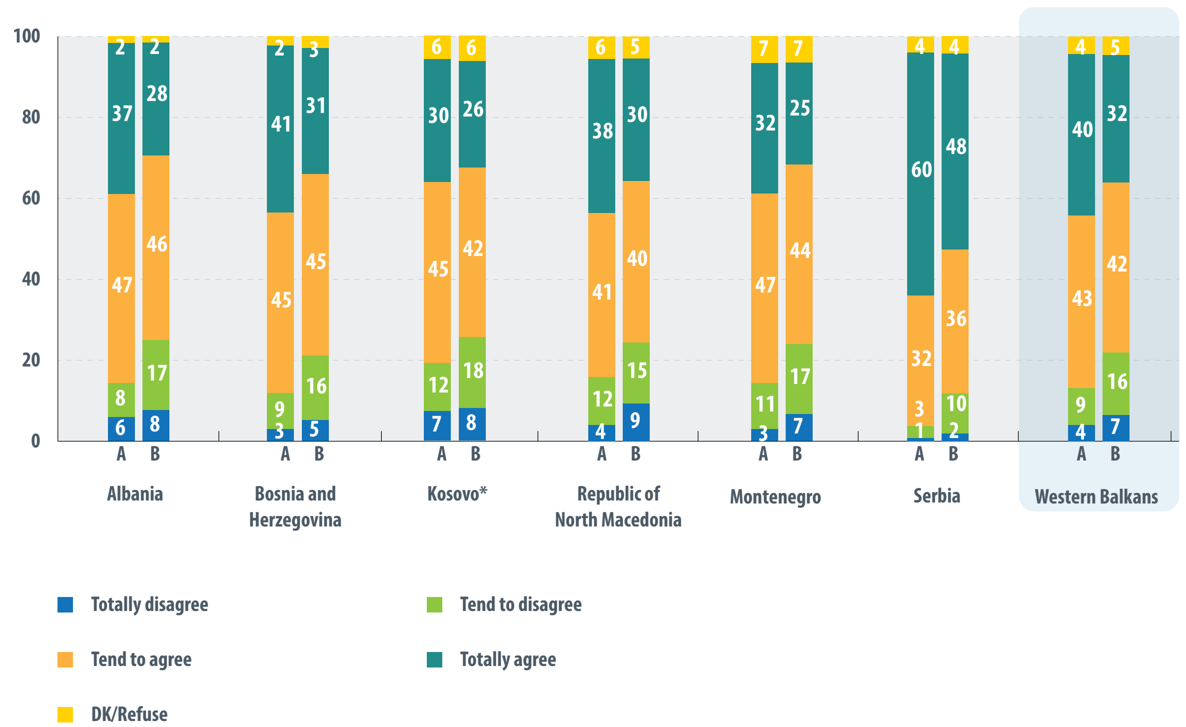
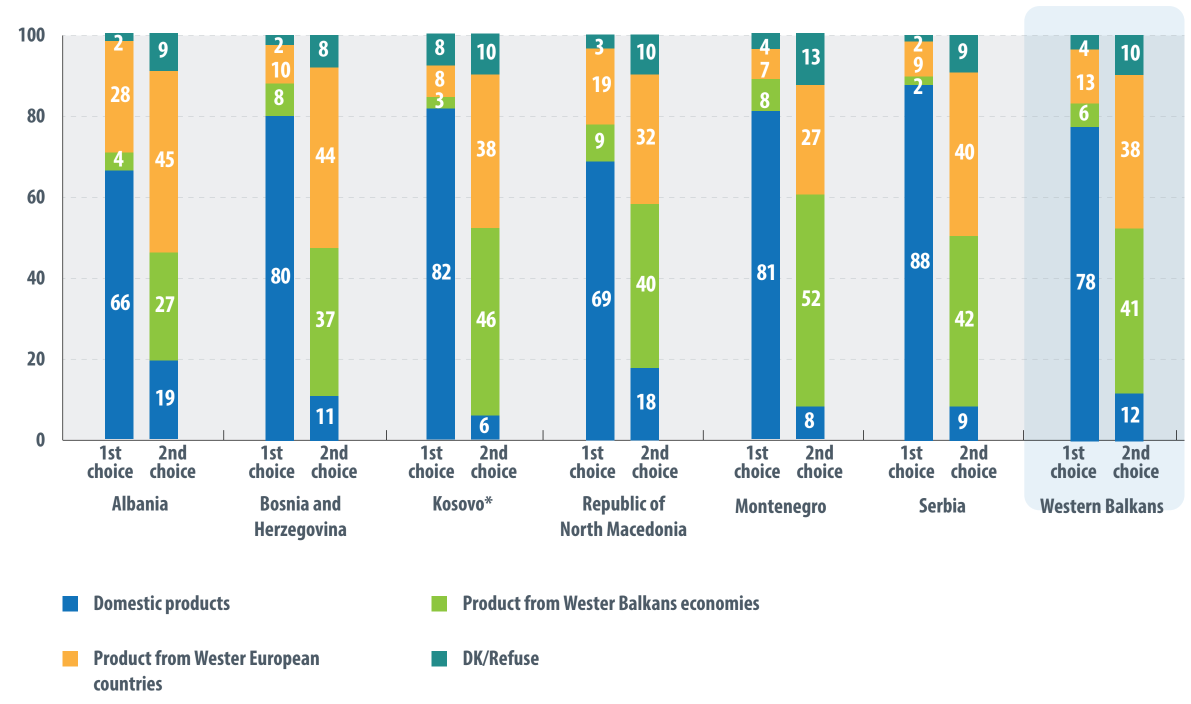


Figure 88: If you could choose a food or beverage product from three different sources: domestic product, product from the Western Balkans region and product from Western European economies, which one would be your first choice, and which would be second?

All respondents, N=6000, share of total, % of agreement or disagreement)



Since the inception of the Barometer, results indicate that the vast majority of Western Balkans citizens perceive EU as the most preferred block to trade with, with 73% of total respondents advocating for further improvement of their governments' trade and investment links with this economy. Some 35% of participants are proponents of strengthening trade and investment relations with Russia, while 36% view Turkey as the potential biggest trading partner for the Western Balkans region.

On the other hand, the enticing Chinese market is arousing the curiosity of Western Balkans participants for potential investment and strengthened trade relations. More specifically, 34% of citizens think that their governments should nurture trade with this growing market. Less than one fifth of citizens think that their government should strengthen trade and investment relations with Middle East and Gulf economies, while 2% believe that other trading markets should be given preference in terms of trade and investment.

The domestic goods and services are increasingly being considered as competitive products compared to the goods imported from other Western Balkan economies and the EU. Some 83% of the total respondents affirm that their domestic products can compete well when compared to competitors from the region (83%, from 86% in 2019) as well as from the EU (74%, from 73% in 2019).

At economy level, respondents in Serbia continue to convincingly lead the region in product confidence both when coming up against competition from the region (92%) and well as from the EU (84%). Though there is an incremental increase of confidence in domestic products, respondents from Kosovo* are least likely to consider domestic products competitive against regional (75%) and EU (68%) competition.

PERCEPTIONS OF TRANSPORT AND INFRASTRUCTURE

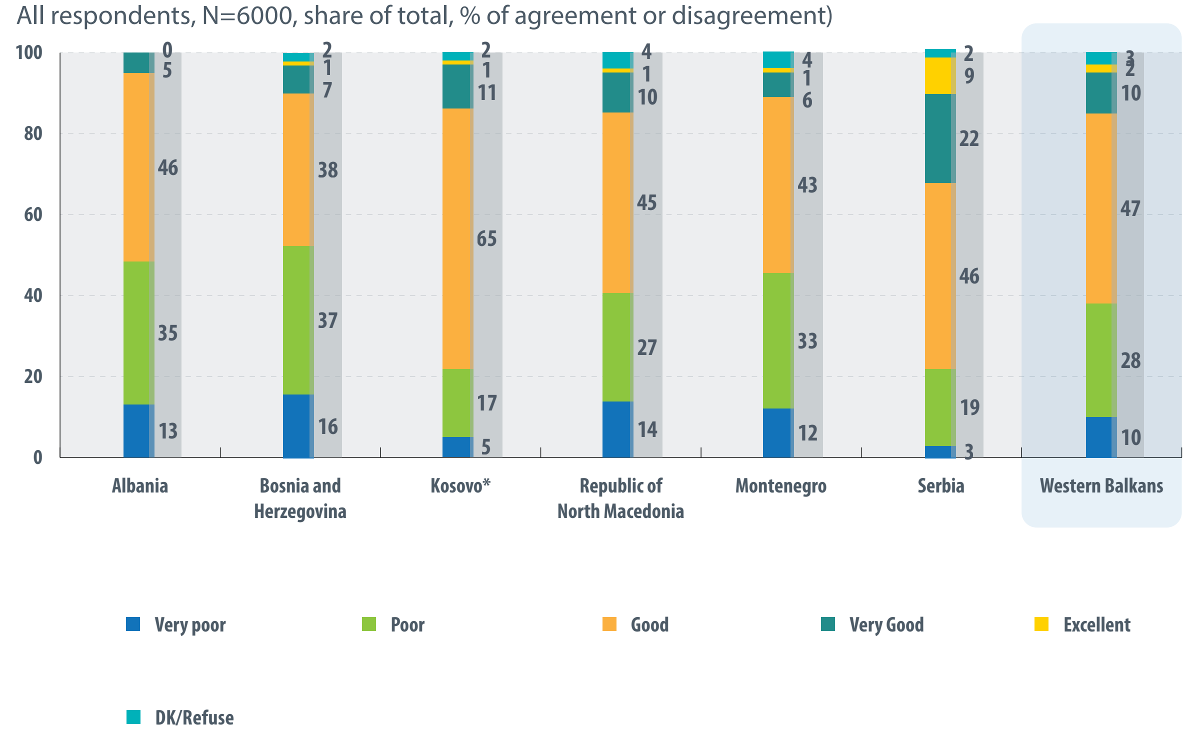
With increasingly prioritised connectivity in the Western Balkans' efforts on economic integration regionally and with the EU, citizen's perceptions of the quality of transport are slightly better than in the previous round. Furthermore, the EU's policy agenda and investment priorities in infrastructure in the region are broadening and converging with other areas such as environment, energy, digitalisation and social infrastructure. This shift is reflected in the Green Agenda for the Western Balkans[7] and Investment Plan for the Western Balkans. This plan emphasises the need to speed up construction of new transport infrastructure and upgrade the existing one, with a view to bringing the core transport network up to EU standards. To this end, it also foresees mobilisation of up to EUR 9 billion in grants and EUR 20 billion in loans during 2021 – 2027.[8]

Driven by economic development needs, perceptions and expectations in the region remain centred on road transport as the most used physical infrastructure, and slightly more in this round of the Barometer on railways and air transport. This is logically consistent, given roads' predominance as trading routes within the region and with the EU and huge investment needs in railways. Therefore, levels of dissatisfaction with the quality of transport infrastructure and connections within individual economies (38%) and within the region (26%), as well as with road safety (40%) show that much more needs to be done in terms of investment projects and on governance in this area. ucts from Western Europe are considered as the least favourite goods for the Western Balkans, compared to the domestic and regional ones.

[7] European Commission (2020): Guidelines for the Implementation of the Green Agenda for the Western Balkans, available at: https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A52020SC0223.
[8] European Commission (2020): An Economic and Investment Plan for the Western Balkans, pg. 7, available at: https://ec.europa.eu/neighbourhood-enlargement/sites/default/files/communication_on_wb_economic_and_investment_plan_october_2020_en.pdf.

Figure 89: How do you estimate the quality of transport infrastructure and connections within [ECONOMY]?

All respondents, N=6000, share of total, % of agreement or disagreement)



Citizen's perceptions of transport infrastructure and connections within economies have not changed significantly since the previous round. 59% of respondents (2% less than in 2019) are satisfied with their quality, as opposed to 38% (the same as in 2019) who are not.

Within individual economies, Bosnia and Herzegovina has the most dissatisfied respondents. 53% of them are unhappy with the quality of infrastructure in their economy (down by 4% since 2019), followed by Albania. Kosovo* kept its lead in satisfaction rate, with 77% (10% less than in 2019), this time joined by Serbia, with the same level of satisfaction, a significant 14-point increase since 2019.

Satisfaction with the quality of regional transportation and connections infrastructure is higher than in the previous round (for 2 points, to 64%, on average), and 5% higher than within individual economies. Moreover, the level of dissatisfaction (at 26%) is also 12 points lower than at the economy level (38%). 7% fewer neutral respondents than in 2019 shows increased exposure to regional transport infrastructure.

Viewed by individual economies, Kosovo* kept its lead as the most satisfied one. 85% of respondents, 2% more than in 2019, assess regional transport connections positively. Bosnia and Herzegovina remains the unhappiest economy with regional transport ties (at 44%), mirroring their economy-level perception. Overall, the narrowing divergences of views on regional infrastructure compared to those on national ones could be a sign of a convergence of travel patterns between individual economies.

There is stagnation in the perception of road safety within individual economies. The share of respondents who find roads safe (57%) and of those who do not (40%) is the same as in the previous round.

In individual economies, similarly to perceptions of the quality of transport infrastructure, satisfaction with road safety in Kosovo* is high, at 81%. Bosnia and Herzegovina is the least satisfied economy, with 57% of respondents unsatisfied with road safety and 40% happy with it. These two economies are also on the same opposite ends of the infrastructure quality scale.

Figure 90: How do you estimate the quality of transport infrastructure and connections within the Western Balkans region?

All respondents, N=6000, share of total, % of agreement or disagreement)

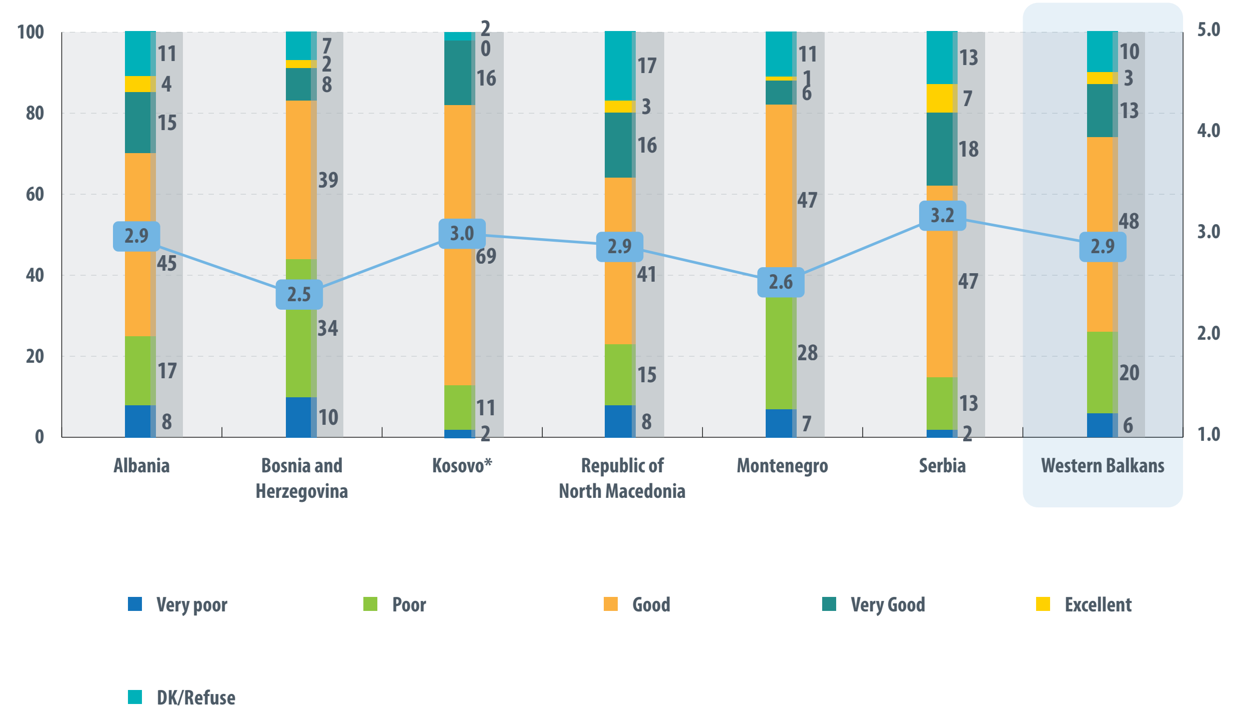


Figure 91: Would you agree that travelling by road in your economy is safe?

All respondents, N=6000, share of total, % of agreement or disagreement)

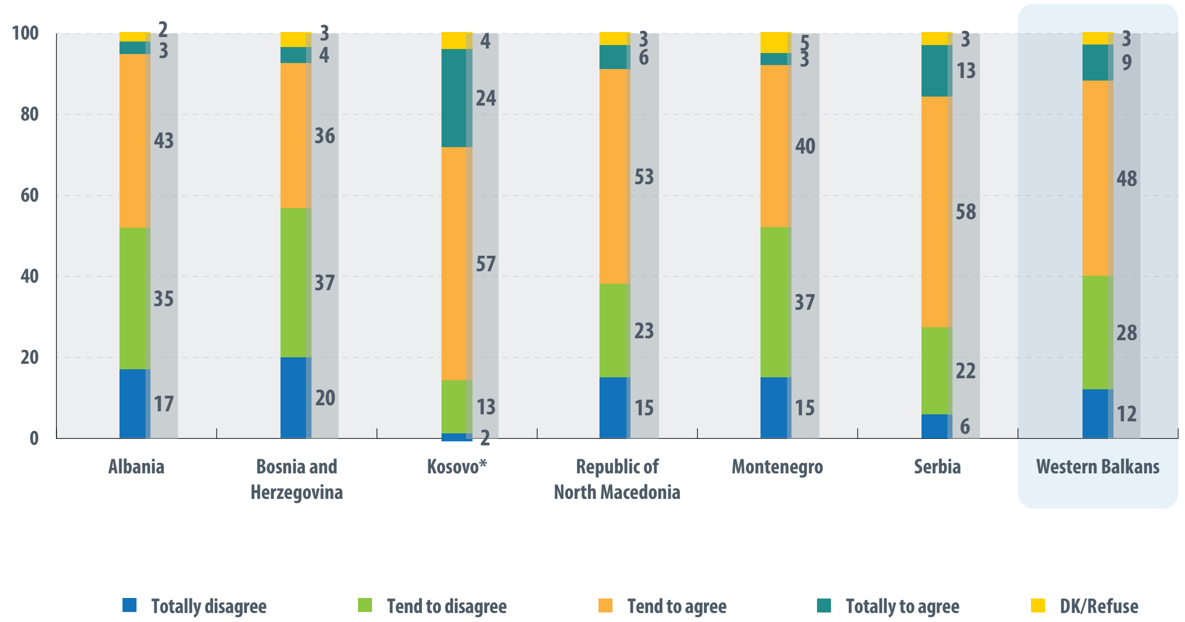
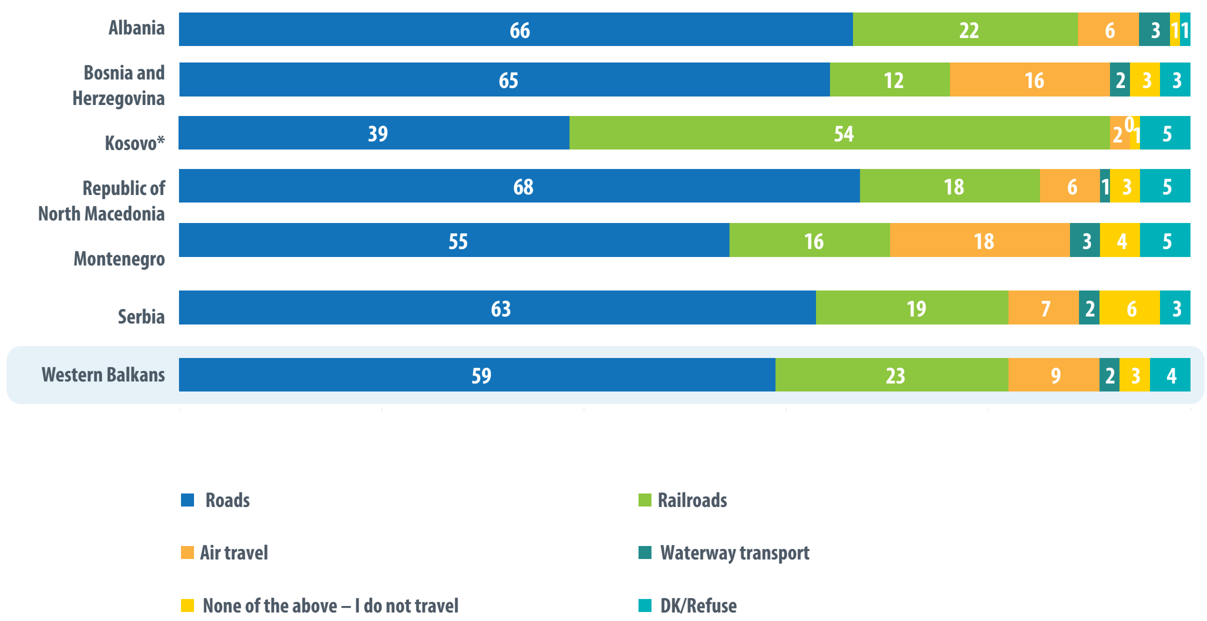


Figure 92: In your opinion, which passenger transport mode improvements would have the highest beneficial impact on your travelling?

All respondents, N=6000, share of total, % of agreement or disagreement)



The share of respondents who view road improvements as most beneficial remains a majority, albeit a smaller one (59%) than in 2019 (71%). Support for investment in railways also increased for 5%, to 23%, as well as for air travel, for 3%, to 9%. The share of those not travelling also grew by 1% (from 2% in 2019 to 3%).

The Republic of North Macedonia is the economy with the highest number of respondents supporting investment in roads (68% of them), followed by Albania (66%) and Bosnia and Herzegovina (65%). The share of respondents in Kosovo* who prioritise railway travel has hiked to 54% from 37% in 2019.

ATTITUDES TOWARDS CLIMATE CHANGE AND ENERGY

Needs to invest in curbing climate change and energy in the region are even bigger given the EU's goal to go carbon free by 2050. This long-term transformation agenda is anchored in the Green Agenda for the Western Balkans, launched at the Sofia Summit in November 2020 and supported on the financial side by the EU's Economic and Investment Plan for the Western Balkans. The Green Agenda is effectively an extension of the European Green Deal to the region, focusing on long-term reforms in energy and environment needed in order to achieve climate neutrality.

The level of climate awareness in the region remains roughly as high as in the previous survey. Three-quarters of respondents are concerned with climate change and pollution, and over 60% are willing to pay more for environmentally friendly products. Citizens remain about as willing as in the previous round to take more climate mitigating measures such as cutting down consumption, buying locally produced food and improving waste management. Nevertheless, half of them do not believe in the region's achieving climate neutrality by 2050.

Overall, the level of region's concern over climate change remains as high as in 2019 (at 74%), despite fluctuations between economies.

The Republic of North Macedonia, with 82% of respondents seeing climate change as a serious problem, is the most climate-concerned economy, followed by Serbia, with 81% (4% less than in 2019). A significant hike in the share of respondents concerned by climate change (by 29%, from 51% in 2019) is notable in Kosovo*. Albania, with 62%, is the least climate-concerned economy, followed by Montenegro with 66%.

Figure 93: Is climate change a problem?

All respondents, N=6000, share of total, % of agreement or disagreement)

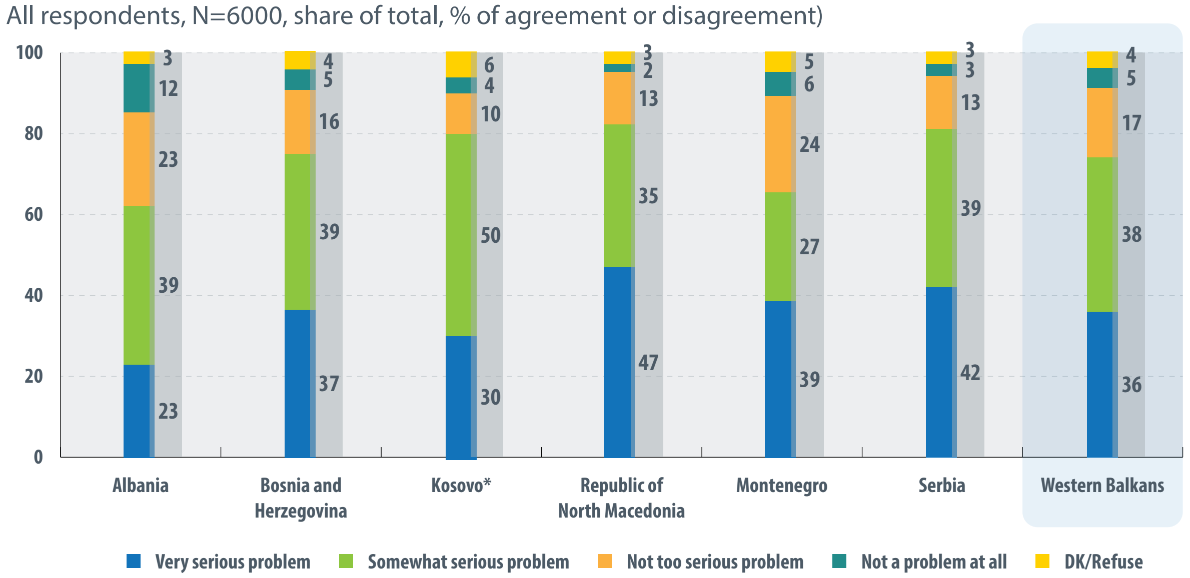


Figure 94: Do you consider pollution to be a problem in your place of living?

All respondents, N=6000, share of total, % of agreement or disagreement)

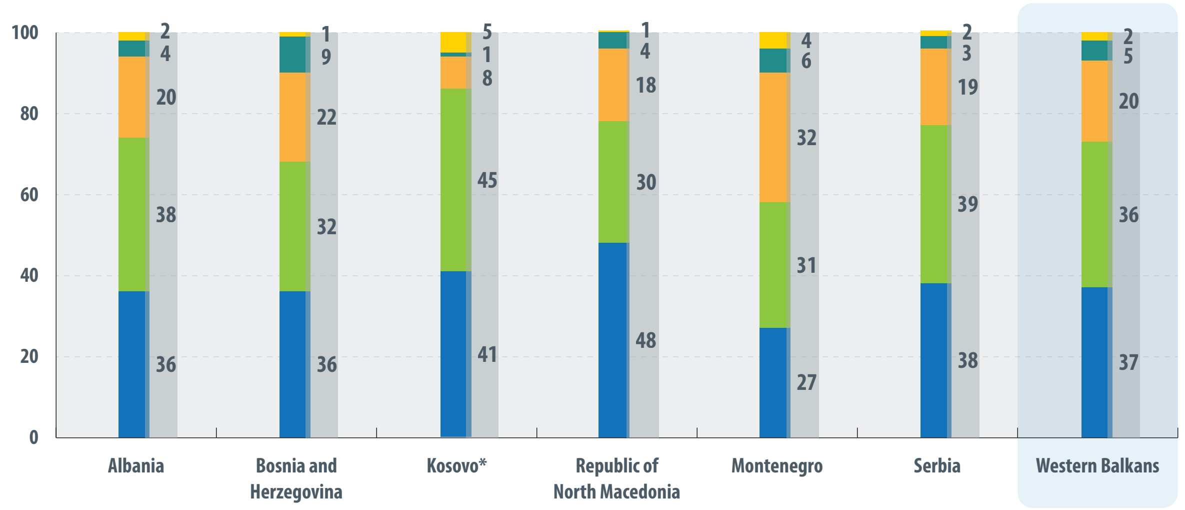
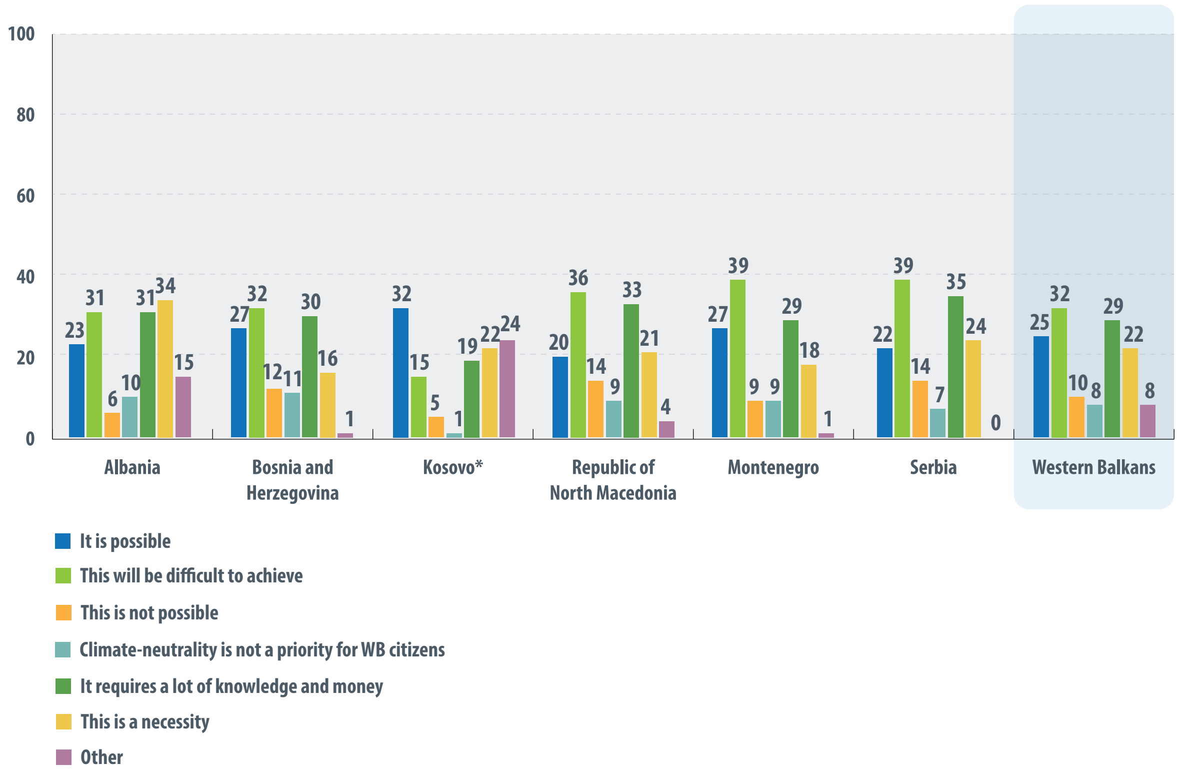


Figure 95: Do you think that reducing CO2 emissions and bringing them to the level close to zero which will allow achieving climate-neutrality in the WB by 2050 is feasible?

All respondents, N=6000, share of total, % of agreement or disagreement)



On average, the share of respondents in the region who see pollution as a problem and those who do not is roughly the same as in 2019, namely three-quarters versus one-quarter.

On the other hand, looking at economies individually, Kosovo* has the highest share of respondents concerned by pollution (86%), a remarkable 20% increase since 2019. It is followed by the Republic of North Macedonia and Serbia, with 78% and 77%, respectively. Montenegro, at 58%, remains the least concerned, despite an incremental increase. It is followed by Bosnia and Herzegovina, with 68%.

The region is overall sceptical about achieving climate neutrality by 2050. Only 25% of respondents find it possible and 22% find it necessary. Half of respondents (50%) are of the opinion that it is either impossible, difficult to achieve or not a priority.

Looking at individual economies, the Republic of North Macedonia is the most sceptical, with 20% thinking that achieving climate neutrality in the region by 2050% is possible, as opposed to 59% finding it either impossible, difficult to achieve or not a priority. Montenegro is the second most sceptical, with 57% finding it either impossible, difficult to achieve or not a priority. Kosovo* is the most optimistic of achieving climate neutrality by 2050: about one-third of respondents (32%) find it possible, 22% find it necessary, 21% are sceptical and 24% of respondents, the highest in all economies, have no opinion.

Despite scepticism about climate neutrality, willingness among citizens at regional level to pay more for environmentally friendly products (62%) has decreased slightly (for 5 points). The share of respondents not prepared to pay extra to help the environment has remained the same (26%).

Looking at individual economies, Montenegro leads in the share of environmentally friendly shoppers (71%). It is followed by Albania, Serbia and the Republic of North Macedonia, all with about two-thirds of respondents ready to buy environmentally friendly products even if they cost a little bit more.

On the other end of the scale, 26% of respondents in Kosovo* are not willing to pay more for environmentally friendly products, a 5-point increase from 21% in 2019. Kosovo* also has the highest number of undecided respondents, 27% (5% more than in 2019).

Figure 96: Do you agree with the following statement: I'm ready to buy environmentally friendly products even if they cost a little bit more?

All respondents, N=6000, share of total, % of agreement or disagreement)

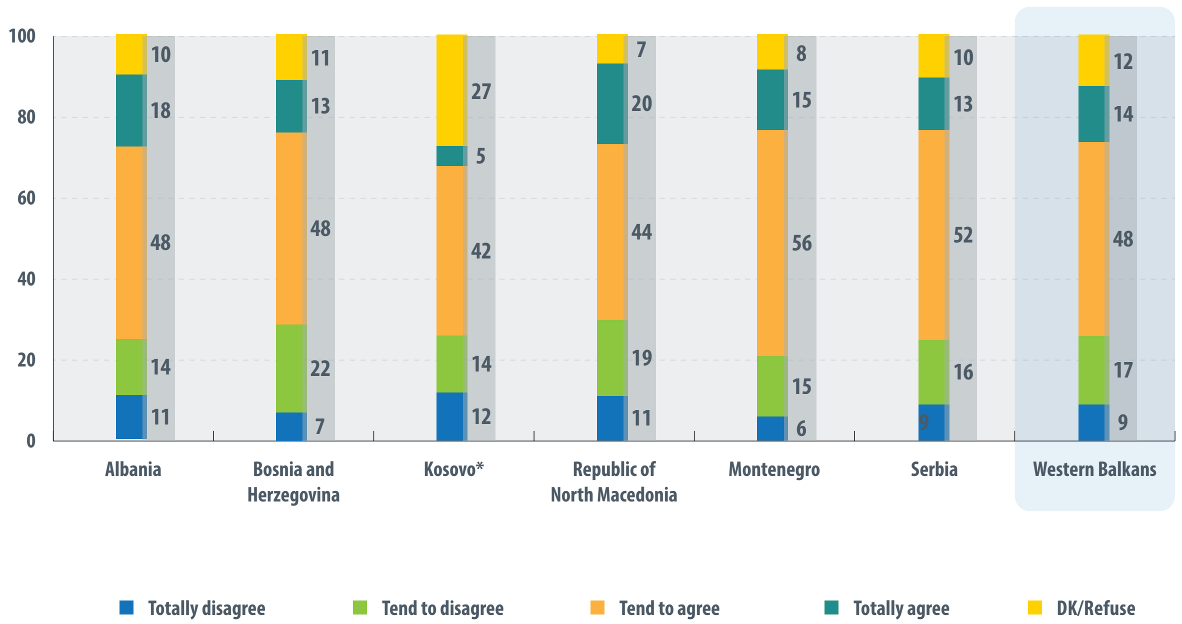


Figure 97: Which of the following actions have you taken, if any?

(Results for the Western Balkans region) (All respondents, N=6000, multiple answers, %)

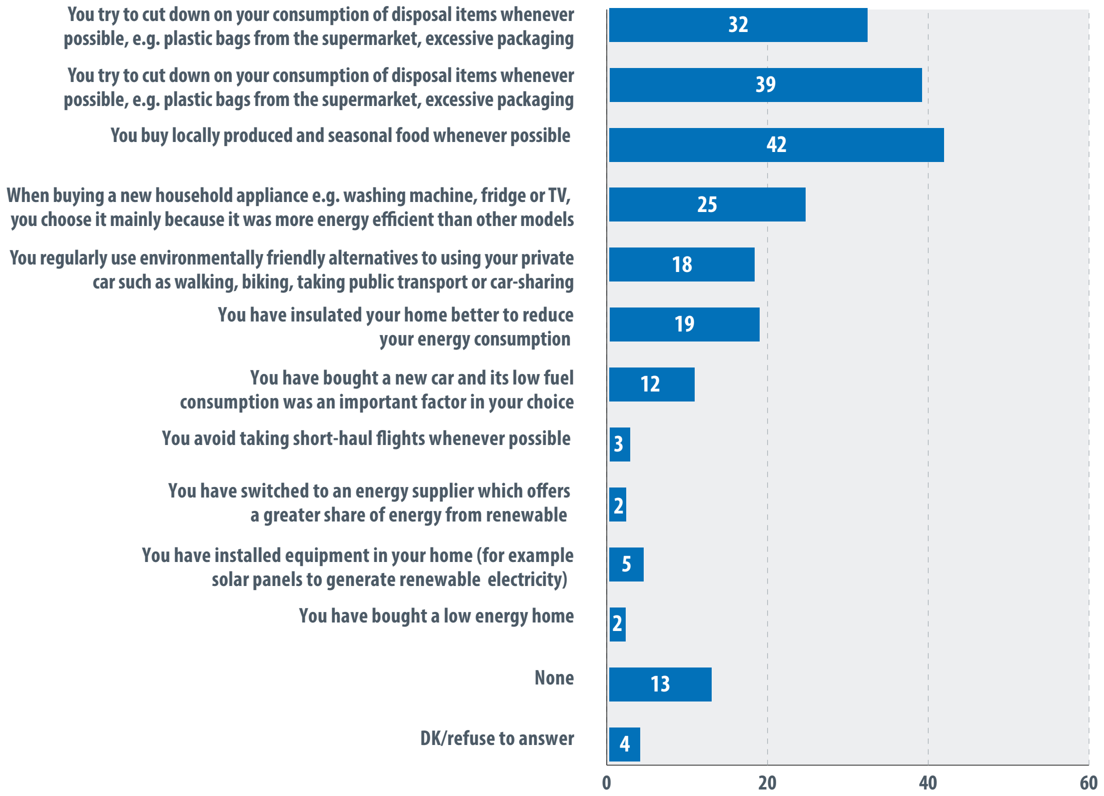


Table 1: Which of the following actions have you taken, if any?

(Results by economies) (All respondents, N=6000, multiple answers, %)

	Albania	Bosnia and Herzegovina	Kosovo*	Republic of North Macedonia	Montenegro	Serbia
You try to reduce your waste and you regularly separate it for recycling	35	28	27	41	29	35
You try to cut down on your consumption of disposable items whenever possible, e.g., plastic bags from the supermarket, excessive packaging	39	46	29	37	37	49
You buy locally produced and seasonal food whenever possible	36	46	38	35	51	48
When buying a new household appliance e.g., washing machine, fridge or TV, you choose it mainly because it is more energy efficient than other models	33	15	29	32	21	19
You regularly use environmentally friendly alternatives to using your private car such as walking, biking, taking public transport or car-sharing	13	13	28	17	15	23
You have insulated your home better to reduce your energy consumption	9	20	18	26	16	24
You have bought a new car and its low fuel consumption was an important factor in your choice	6	8	9	12	19	16
You avoid taking short-haul flights whenever possible	4	3	2	4	5	3
You have switched to an energy supplier which offers a greater share of energy from renewable sources than your previous one	2	1	1	4	3	2
You have installed equipment in your home (for example solar panels to generate renewable electricity)	11	3	2	12	2	1
You have bought a low energy home	6	1	1	2	1	0
None	15	12	9	16	10	15
DK/refuse to answer	4	3	8	3	4	2

Buying locally produced food is the main climate mitigation measure with 42% (4-point less than in 2019), followed by cutting down consumption with 39% (same as in 2019), and reducing waste and separating it for recycling with 32% (4-point less than in 2019).

The fourth most popular climate mitigation measure is purchasing energy efficient appliances, practiced by one-third of respondents (25%), with a 2-point increase. Then there are those who admit having taken no actions to protect the environment (13%), 2 points less than in the previous round. 19% of respondents stated that they have cut energy losses in their homes through better insulation, which is 4% more than in 2019.

PERCEPTIONS OF PUBLIC INSTITUTIONS AND SERVICES – CONFIDENCE IN AND PERCEPTIONS OF INDEPENDENCE OF PUBLIC INSTITUTIONS

Trust in institutions has improved slightly, mainly in delivery of administrative services. Yet, more important and complex aspects such as rule of law, citizens' equality before law and their treatment by public institutions have seen stagnation.

The use of online options to receive public services, due to the pandemic situation, has reached 38%, which is by 11% higher than the share of those using this option to obtain personal documents. About three-quarters (74%) switched online because it is easier and cheaper. While forced by the pandemic crisis, this promises to push governments towards reforms to allow for the delivery of public services in ways that are more user-friendly, affordable and easily accessible.

Some indicators of government performance improved incrementally. Regarding timely provision of information requested, positive rating increased to 52% (5% more). On the index of prices of public services, positive rating increased to 2.7 / 5 scale, up from 2.5 in 2019. In addition, positive assessment of the effectiveness of application of law increased by 7% and negative rating contracted by 8%. This is unsatisfactory given the high share of the latter category of respondents (58%).

Otherwise, the trend in the level of trust in equal application of law with 68% (an 8% drop in positive assessment and 7% increase in negative rating since 2019) is concerning. Likewise, trust in courts improved by 5%, while the level of distrust, at 61% (9% less), is among the highest of all institutions. Parliaments are in the same situation with 61% distrusting them (the same as in 2019). In line with the general level of distrust in institutions and despite improvements since 2019, over half of respondents in the region disagree with the proposition that judicial systems, ombudsperson institutions, supreme audit institutions and media are independent of political influence. climate mitigating measures such as cutting down consumption, buying locally produced food and improving waste management. Nevertheless, half of them do not believe in the region's achieving climate neutrality by 2050.

Overall, the level of region's concern over climate change remains as high as in 2019 (at 74%), despite fluctuations between economies.

The Republic of North Macedonia, with 82% of respondents seeing climate change as a serious problem, is the most climate-concerned economy, followed by Serbia, with 81% (4% less than in 2019). A significant hike in the share of respondents concerned by climate change (by 29%, from 51% in 2019) is notable in Kosovo*. Albania, with 62%, is the least climate-concerned economy, followed by Montenegro with 66%.

Overall, in the region, 53% of respondents had contact with public service providers over the past year, which is a 12-point contraction compared to 2019, thus falling back to the 2018 level.

There was a significant decline in contact with public service providers in most economies, possibly due to the COVID-19 pandemic. Nevertheless, Bosnia and Herzegovina had the highest share of respondents who had contact with public services, namely 58% (12% less than in 2019). Kosovo*, with 55% of respondents who had contact with public services, is the second economy whose citizens had contact with public services, and the only one where such contacts increased for 11% since 2019.

On the other side of the spectrum, the Republic of North Macedonia is the economy whose citizens had the least contact with public services, at 49% (13% less than in 2019). It is followed by Serbia and Albania, with 51% and 52%, respectively. The most significant decrease is noted in Montenegro, by 26%, followed by Albania, by 18%.

Figure 98: Have you had contact with public services in the last year?

(All respondents, N=6000, share of total, %)

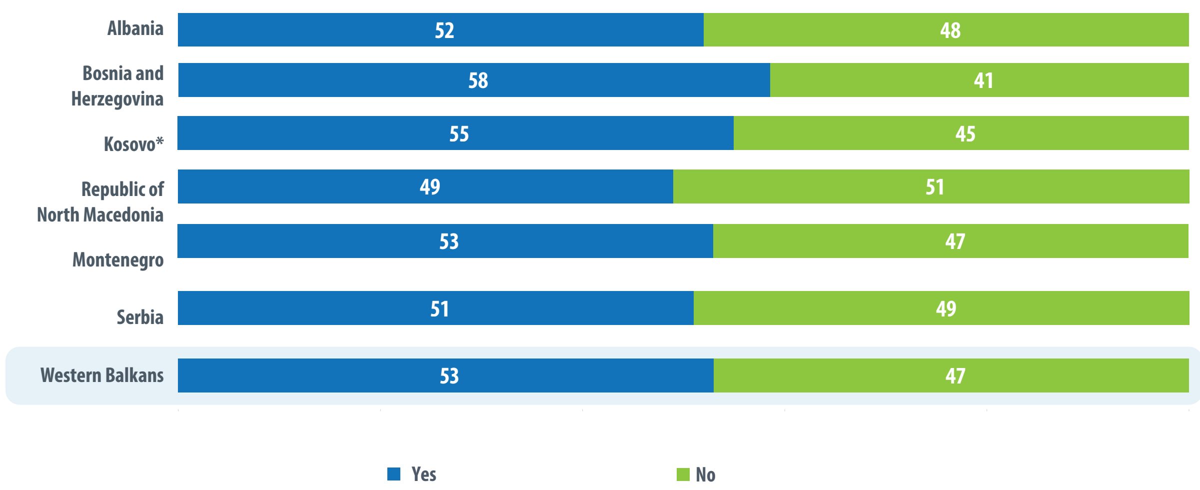
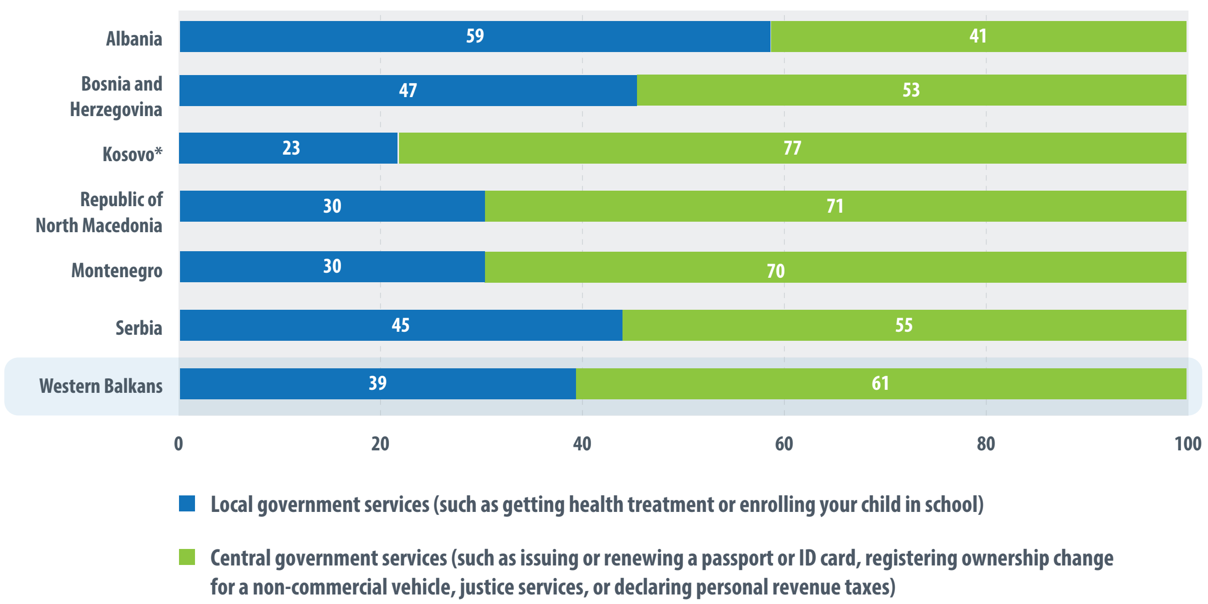


Figure 99: Were those central or local government services?

(Those who have had contact with public services, N=3176, share of total, %)



Looking at the region as a whole, there is a notable shift since 2019 towards more contact with central governments in receiving public services. 61% of respondents engaged with the central level (4% less than in 2019), as opposed to 39% with the local level (30% less).

When looking at individual economies, Kosovo* has had the most remarkable increase in engagement with its central government, from 64% in 2019 to 77%, while only 23% engaged with the local level. Albania has the most significant decline in engagement with the central government (by 23%, from 64% to 41%). Bosnia and Herzegovina (at 47% versus 53% in favour of the central level) has the most balanced picture.

Engagement with local governments decreased in all economies, most notably in the Republic of North Macedonia (by 43%, from 73% in 2019 to 30%) and Kosovo* (by 34%).

On a 1 to 5 scale, the category of prices of public services is the highest rated feature of government performance, with a mean of 2.7 (up from 2.5 in 2019). All the remaining categories – time required to obtain information, treatment of citizens by the public sector and time required to obtain public services – are given the same assessment: 2.6. Looking at trends, prices of public services is the category with the highest improvement (by 0.2 points), while that of treatment of citizens by the public sector has deteriorated the most (from 2.8. in 2019 to 2.7).

Looking at individual economies, treatment of citizens by public services received the highest assessment in Serbia (3.0, up from 2.8 in 2019) and Kosovo* (2.8, down from 2.9 in 2019). It was assessed at the lowest in Bosnia and Herzegovina and Montenegro (both at 2.5). The latter had the most remarkable drop of all the six economies in all four categories, namely by 0.4 points (from 2.9 in 2019). On the other side of the spectrum, the category of prices of public services received the poorest rating in Bosnia and Herzegovina (2.3.) and the highest in Kosovo* (2.8).

This year, Serbia and Kosovo* (both at 2.8) have the most appreciated governments in the region, as opposed to Bosnia and Herzegovina (2.5) and Montenegro (2.4). Of all economies, Serbia and Albania saw improvement since 2019, while Bosnia and Herzegovina and Montenegro deteriorated.

Figure 100: How would you grade the following issues?

(All respondents, N=6000, share of total, %)

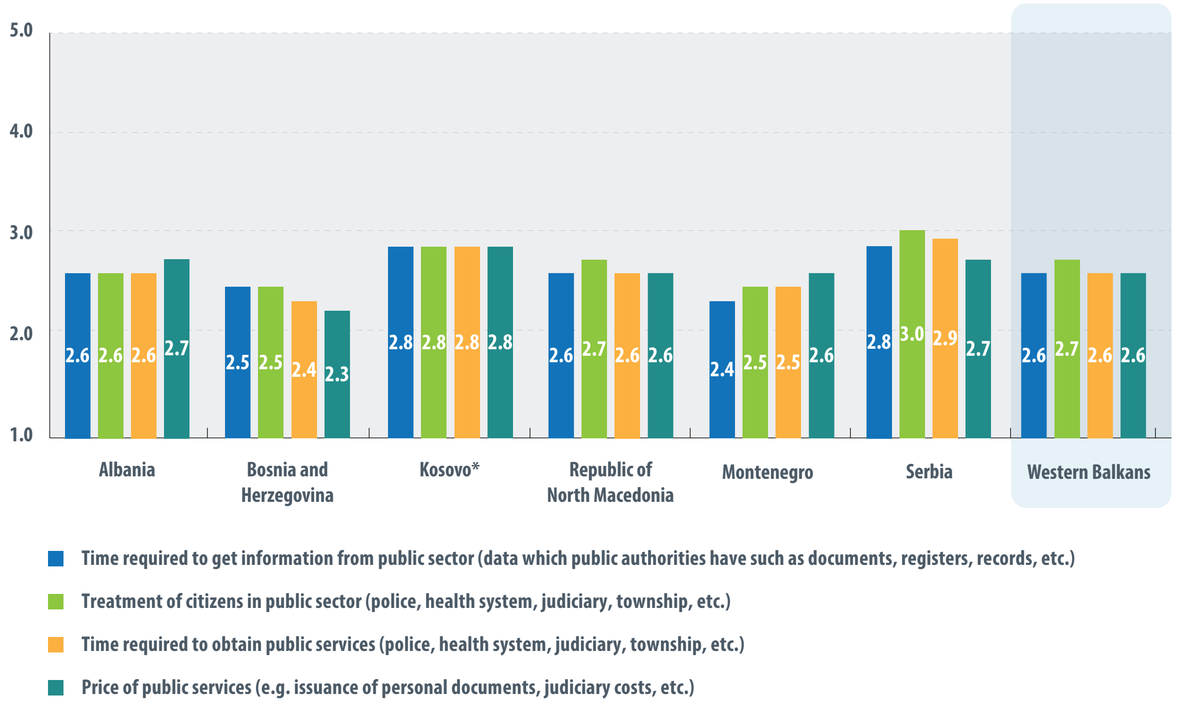


Figure 101: How would you grade time required to get information from public sector (data which public authorities have such as documents, registers, records, etc.)?

(All respondents, N=6000, share of total, %)

When it comes to the time required to obtain information from the public sector, at the regional level most respondents (57%) rate their governments positively. On the other hand, 37% share a negative assessment.

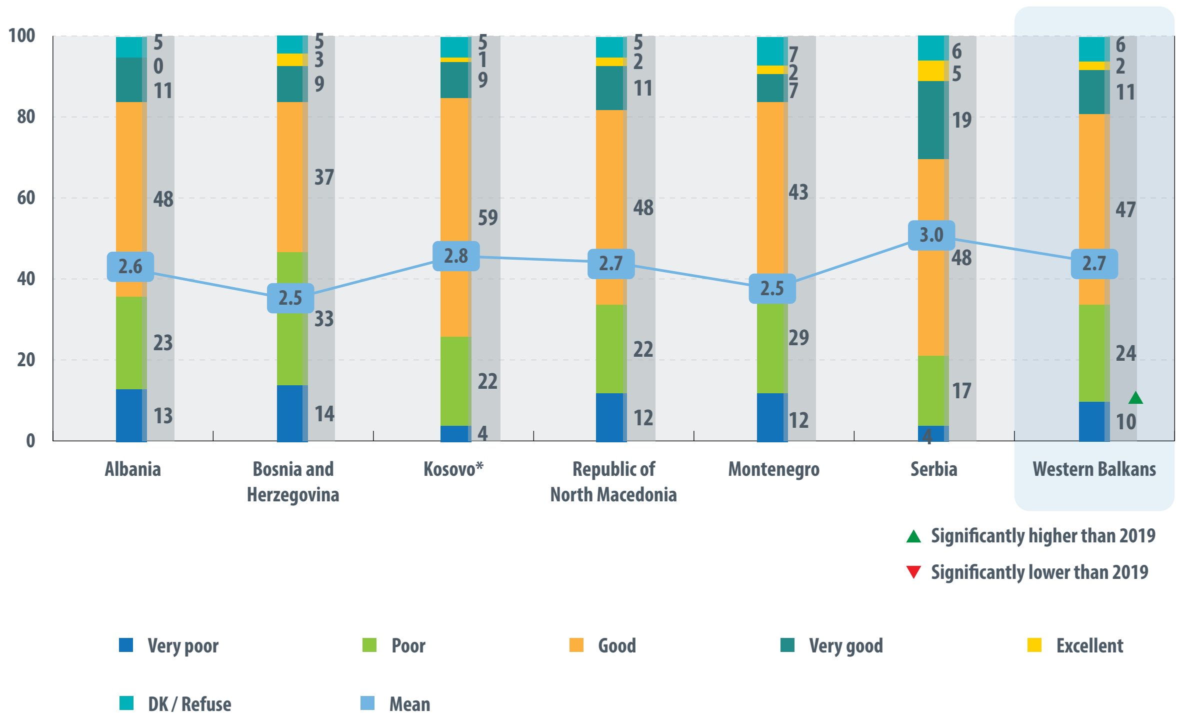
Of individual economies in the region, Kosovo* is rated as the best performing economy, with 71% of respondents sharing a positive assessment, versus 24% sharing a negative one, followed by Serbia (with 60% versus 29%). On the other hand, Montenegro and Bosnia and Herzegovina are the poorest performing economies, with 47% and 45% of respondents respectively having a negative opinion on the time required to obtain information from the public sector.

Western Balkans citizens assess their treatment by the public sector slightly more positively than the time required to obtain information: 60% of respondents share a positive assessment, while 34% rate them negatively.

Serbia is the best performer with 72% of respondents feeling that they are treated well by the public sector. Kosovo* comes close as the second-best performing economy, with 69% of respondents feeling they get the right treatment by the public sector, as opposed to 26% who do not feel so. Citizens in Bosnia and Herzegovina are more or less equally divided between those feeling treated well and those not feeling so (49% versus 47%). Montenegro received a slightly better rating on this indicator: over half of its respondents (52%) gave a positive assessment and 41% a negative one.

Figure 102: How would you grade treatment of citizens in public sector (police, health system, judiciary, township, etc.)?

(All respondents, N=6000, share of total, %)



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Overall, in the region, time required to obtain public services has received a similar assessment as the time required to obtain information from the public sector. 58% of respondents think that services are delivered on time, as opposed to over one-third (36%) who are dissatisfied with regard to timely provision of public services.

Kosovo* and Serbia are two best performing economies on this indicator of government performance. Close to three-quarters of respondents (71%) in Kosovo* and nearly two-thirds in Serbia (63%) think that their governments provide public services on time. Bosnia and Herzegovina is on the other end of the scale, with 48% of respondents dissatisfied with timely delivery of government services.

A similar assessment is shared on the price of public services: 56% of respondents think that public services are affordable, while 37% share a negative assessment.

Again, Kosovo* leads the region with 69% of respondents finding public services affordable. Albania, with 59% versus 31% in favour of positive rating, is rated as the second most affordable economy, and also has the highest number of undecided respondents (11%). Bosnia and Herzegovina is the poorest performing economy on this: over half (52%) have a negative assessment, while 43% rate it positively.

Figure 103: How would you grade time required to obtain public services (police, health system, judiciary, township, etc.)?

(All respondents, N=6000, scale from 1 to 5, share of total, %)

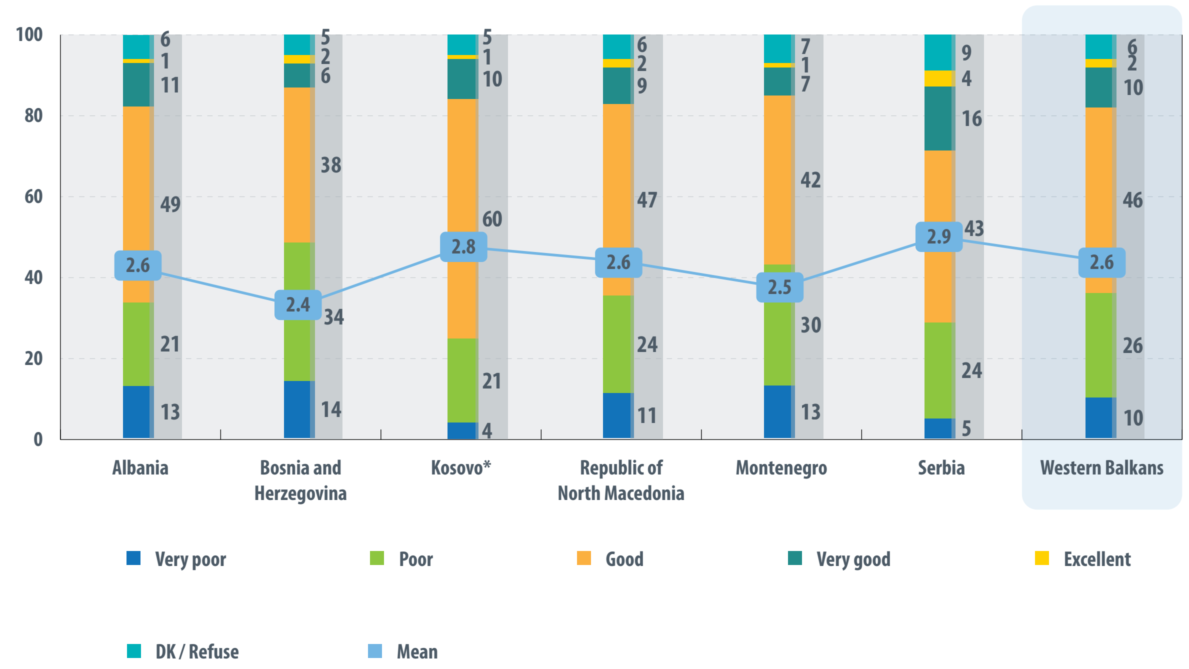


Figure 104: How would you grade price of public services (e.g., issuance of personal documents, judiciary costs, etc.)?

(All respondents, N=6000, scale from 1 to 5, share of total, %)

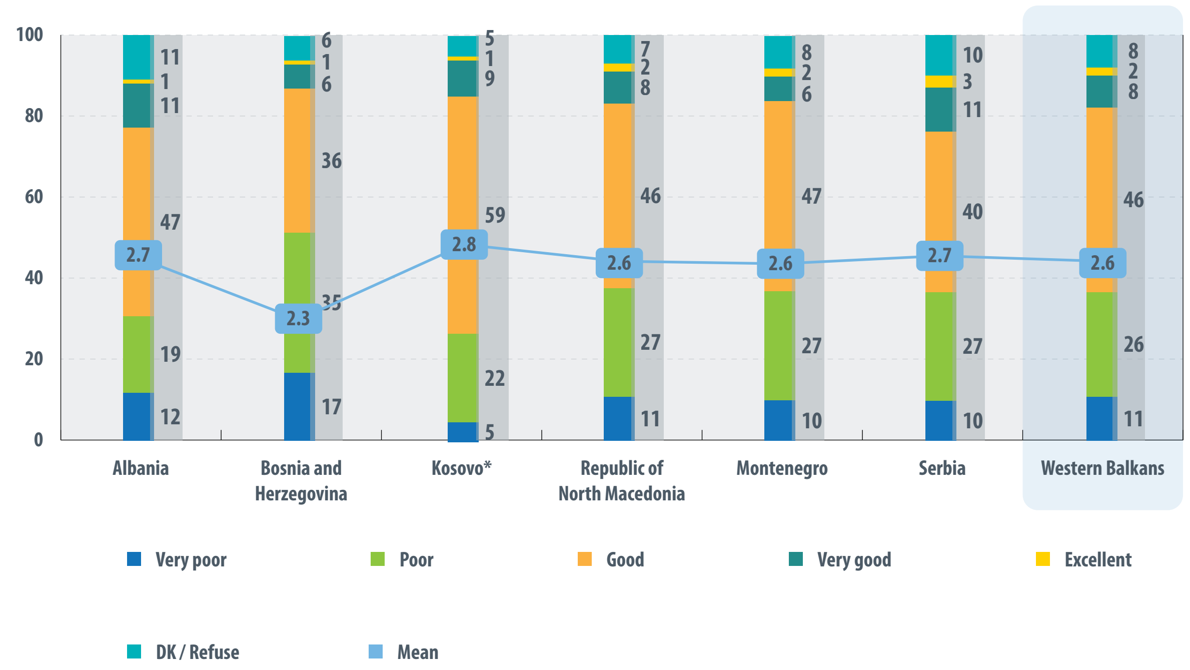


Figure 105: Is it possible to get your personal documents (birth certificate, citizenship, etc.) or any other personal document online?

(All respondents, N=6000, share of total, %)

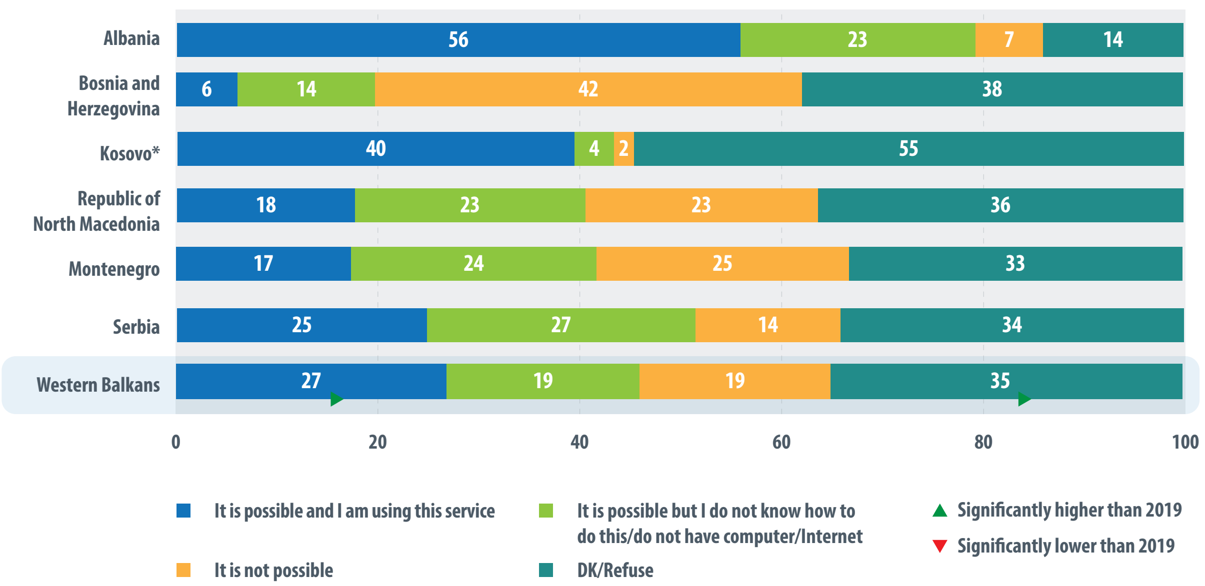
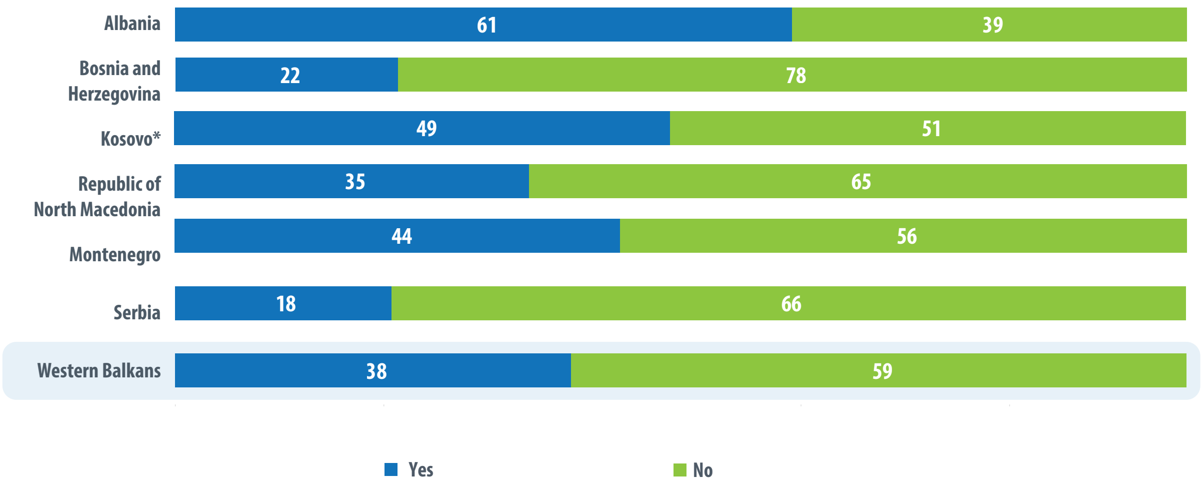


Figure 106: Did you switch to online/digital services during the pandemic?

(All respondents, N=6000, share of total, %)



There was an incremental increase in the region in using online services to get personal documents reaching 27%, 35% respondents refused to answer, while the share of those who are aware of their availability but do not know how to use them and of those who think it is not possible is the same (19%).

There are still differences between individual economies on the use of e-government services to obtain personal documents. Albania, with 56% of respondents using it (a 24-point hike since 2019) is the leader in the region, followed by Kosovo*, where the number has more than tripled (from 13% in 2019 to 40% in 2020). Bosnia and Herzegovina lies at the other end of the scale: only 6% use online services to obtain personal documents, 14% do not know how to use them and 42% think that they are not available, and 38% did not answer the question. The latter percentage among respondents in Kosovo* is 55%.

The median regional rate of respondents who switched to online/digital services during the pandemic is 38%. This shows a propensity of citizens to utilise e-governance, and therefore an opportunity for governments to expand it.

The patterns of such a switch during the pandemic also vary greatly between individual economies. The greatest number of respondents who did so in Albania is 61%, followed by Kosovo*, with nearly a half (49%) of them having done so in their working patterns. Serbia (with 18%) is at the bottom of the list, followed by Bosnia and Herzegovina (with 22%).

Overall, in the region, about three-quarters of respondents (74%) switched online because it is easier and faster, 42% because of anti-pandemic restrictions imposed by governments and 18% only because it is cheaper.

Looking at individual economies, the Republic of North Macedonia (88%) has the highest number of respondents who switched online because it is easier and faster, followed by Serbia (81%). Kosovo* is at the other end of the spectrum, with 60% of respondents having switched online because it is easier and faster, followed by Albania. Albania also has the highest number of respondents who switched online due to pandemic-induced restrictions (58%), followed by Kosovo* (53%). Bosnia and Herzegovina is at the other end of the scale, with only 23% of respondents who switched online due to pandemic-induced restrictions.

When it comes to reasons for not switching to online digital services, over half of Western Balkans respondents (55%) do not find it necessary, while more than one-third (37%) claim they do not have the skills and equipment needed to use online services. Another 17% say this is because they are not informed on what services are offered online or through digital platforms, and 12% worry about sharing personal data.

Of all six economies, Kosovo* leads with the share of respondents who did not switch online because they did not find it necessary (78%), followed by Bosnia and Herzegovina (59%). The Republic of North Macedonia has the smallest share of such respondents (43%) and the highest share of those who are not informed on what services are available online or through digital platforms (24%).

Kosovo* has by far the smallest number of respondents who did not switch online due to lack of equipment (2%) or skills required (5%) or because of having to share personal data (4%). 21% in Serbia did not do so due to lack of equipment. Albania has the highest number of respondents (36%) lacking skills required to switch to online services, compared to only one-twentieth (5%) in Kosovo*.

Figure 107: Why did you switch to online digital services during the pandemic?

(Those who switched to online, N=2296, share of total, %)

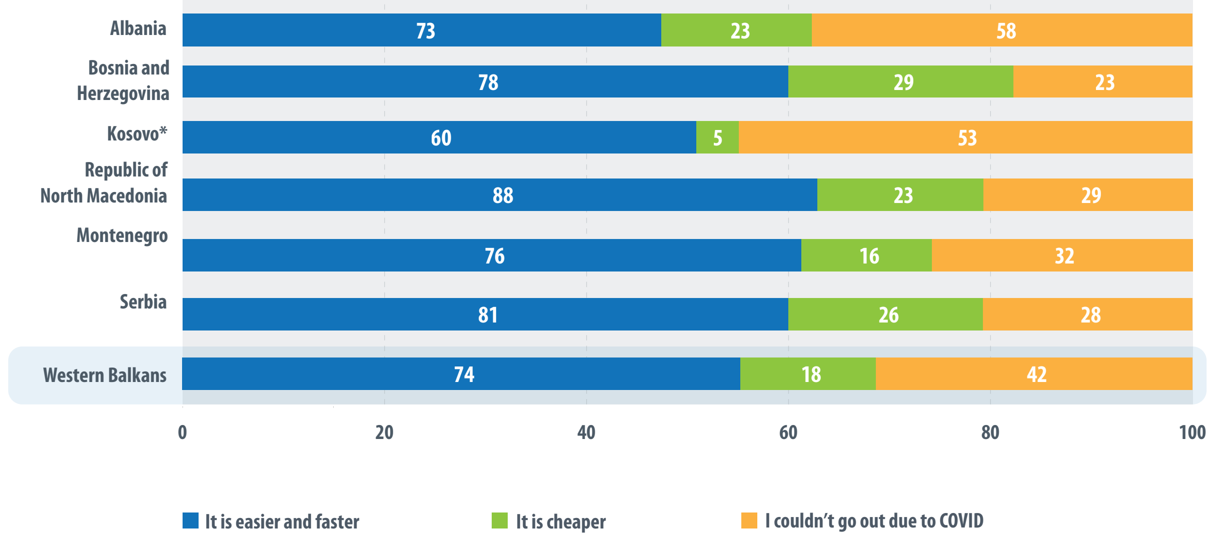


Figure 108: Why did you NOT switch to online digital services during the pandemic?

(Those who didn't switch to online, N=3535, share of total, %)

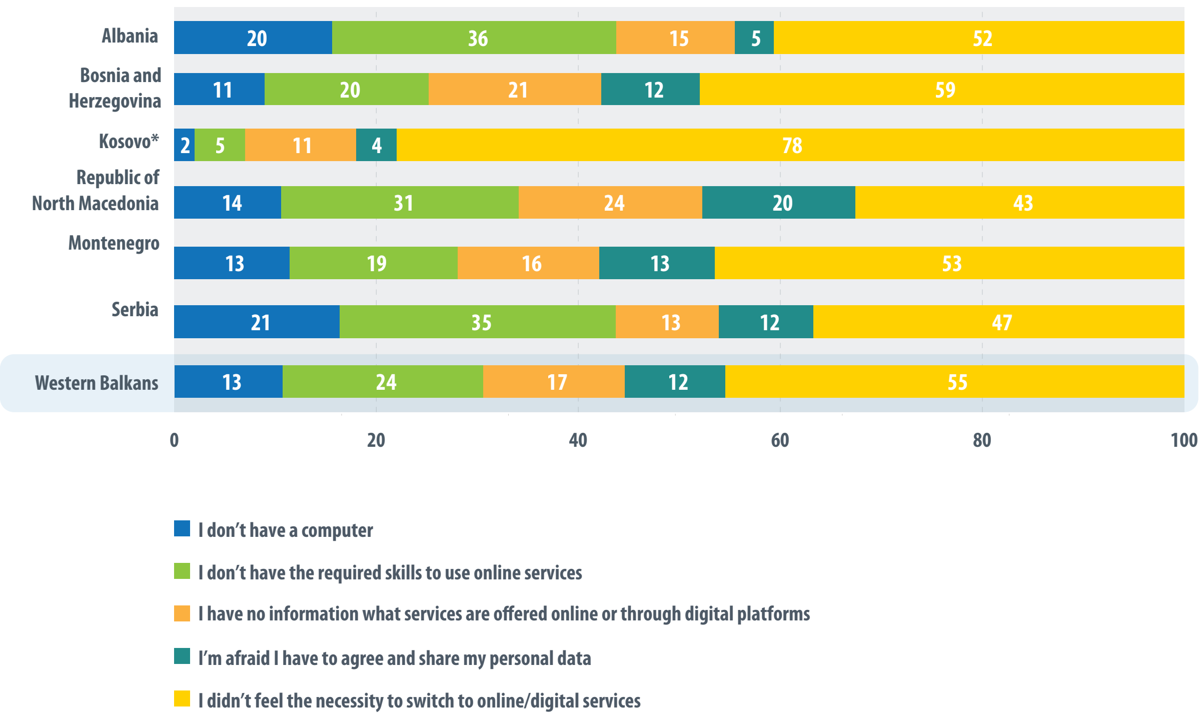


Figure 109: Do you agree with the following statements?

A – Requests for information held by a government agency are granted in a timely manner; B - The information provided by a government agency is pertinent and complete; C - Requests for information are granted by a government agency at a reasonable cost

(Results for the Western Balkans region) (All respondents, N=6000, scale from 1 to 4, %)

As assessed by respondents of this year's Barometer, governments' performance in timely provision of requested information has slightly improved since 2019 (by 5%): 52% of them believe that government agencies provide such information in a timely manner, while more than one-third (36%) disagree.

Assessment of governments' performance on quality and quantity of information provided has slightly improved (for 4%) since 2019: 55% agree that information provided is pertinent and complete, while 34% disagree. Governments' performance has seemingly improved more (by 7%) in cost-effectiveness of providing information. Over half of respondents (51%) are happy with the cost of service provided, while 35% disagree.

Within economies, Bosnia and Herzegovina remains the economy with unhappy respondents with government's performance (only sharing with Montenegro for the question A on delivery timing of information, at 33%). Kosovo* has replaced Montenegro as the most satisfied economy on all these indicators. More than 60% of its respondents are happy with all three categories.

Figure 110: Do you agree with the following statements?

A - Requests for information held by a government agency are granted in a timely manner; B - The information provided by a government agency is pertinent and complete; C - Requests for information are granted by a government agency at a reasonable cost

(Results by economies) (All respondents, N=6000, scale from 1 to 4, %)

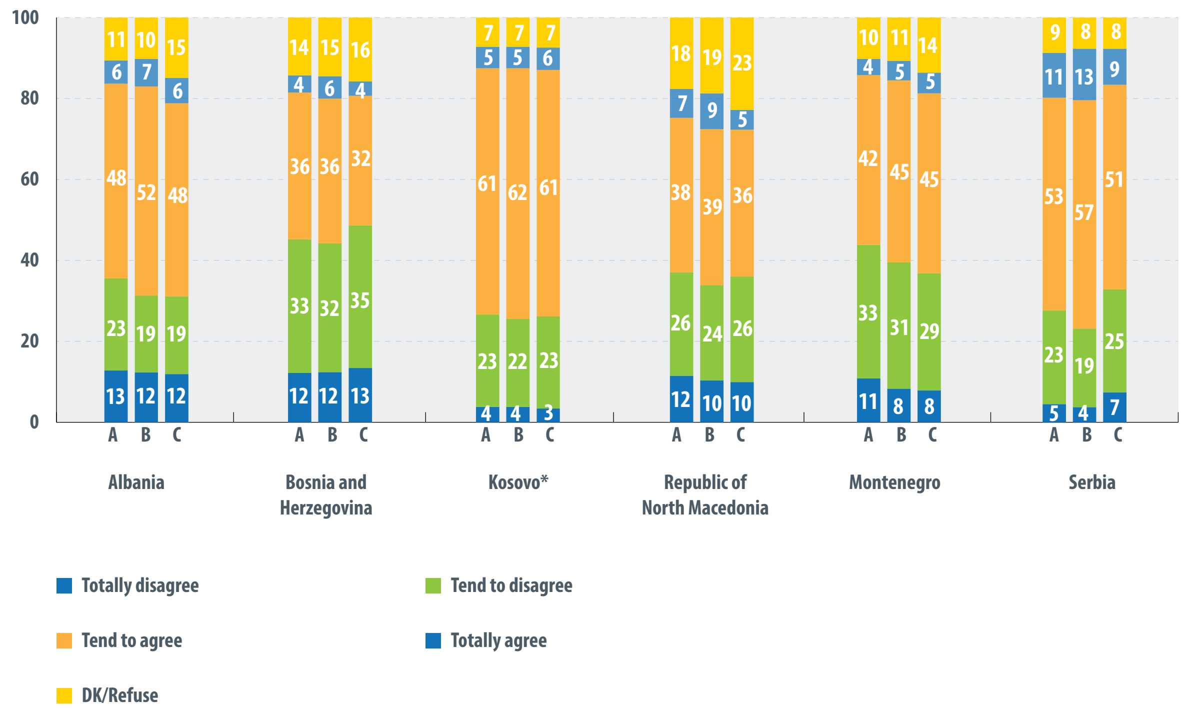


Figure 111: Do you agree that the administrative procedures in public institutions in your economy are efficient? (For example: administrative procedures in township where you get your documents, in police where you put in a request, etc.)

(All respondents, N=6000, scale from 1 to 4, share of total, %)

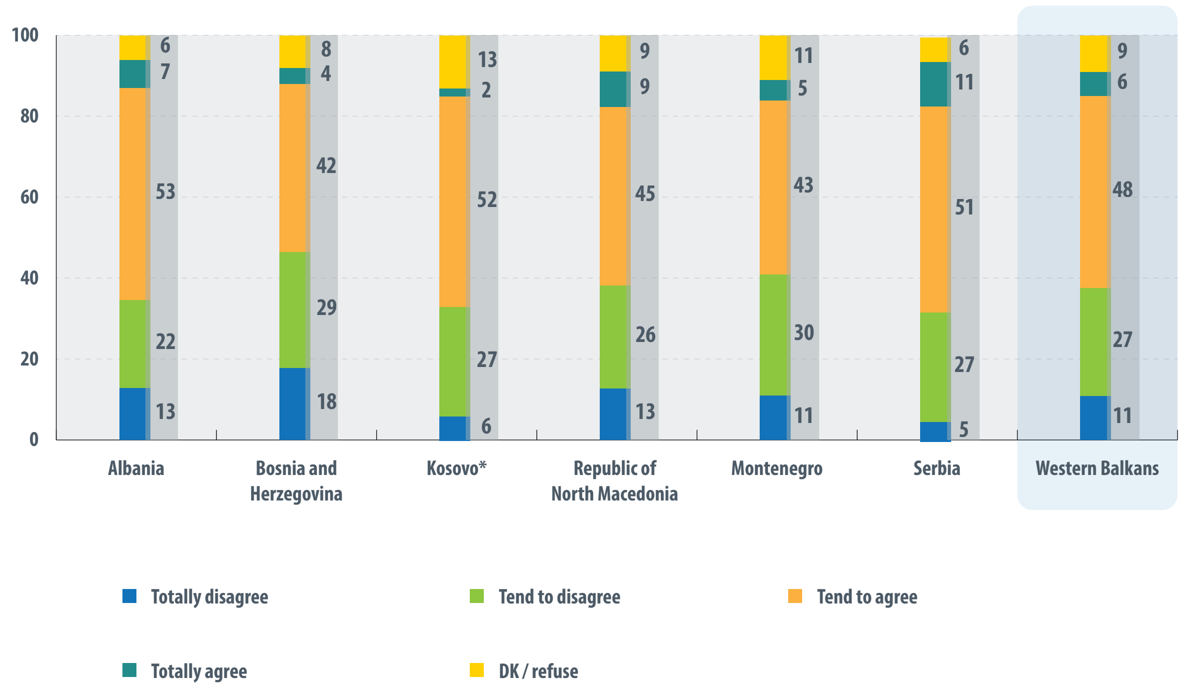
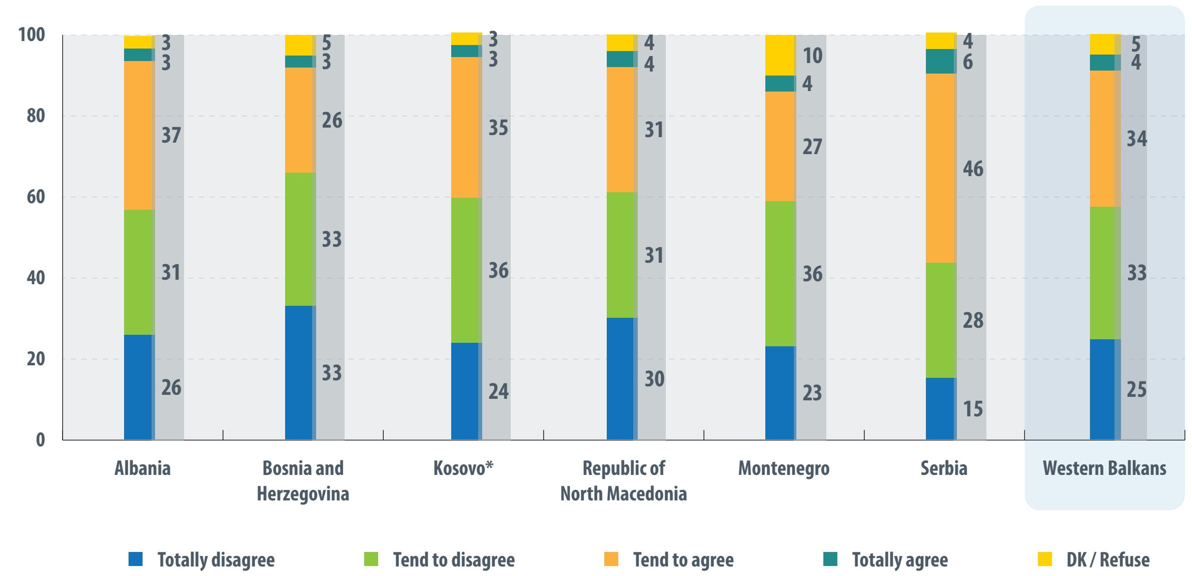


Figure 112: Do you agree that, in your economy, the law is applied and enforced effectively?

(All respondents, N=6000, scale from 1 to 4, share of total, %)



Citizens' perception of efficiency of administrative procedures improved almost insignificantly since 2019. 54% (a 1-point increase) agree that such procedures are efficient. On the other hand, 38% (2% less) disagree.

Serbia is the most satisfied economy with government efficiency, with around two-thirds (62%) of respondents happy with efficiency of administrative procedures, while around one-third (32%) disagree. Bosnia and Herzegovina remains the least happy economy with government efficiency, with an almost equal share of happy and unhappy respondents (46% and 47%, respectively).

At the regional level, rating of effective application of laws saw some improvements. 7% more respondents in the region compared to Balkan Barometer 2020 agree with the proposition that the law is applied and enforced effectively, while the share of those who do not believe so is 8% lower. However, the 20-point gulf between the former (58%) and the latter (38%) remains huge.

Within individual economies, Bosnia and Herzegovina (66%) leads with the number of respondents who disagree that the law is applied and enforced effectively. Only less than one-third (29%) agree, despite a 12-point hike (from 17% in 2019). On the other hand, over half of respondents in Serbia (52%) agree with this proposition, while 43% disagree. In between these two, about the same share (60%) of respondents in the rest of economies are distrustful about efficient application and enforcement of the law.

The situation is worse when it comes to equal application of the law. The gulf between respondents who do think that the law is applied equally and those who do not is 40%. Overall, in the region, 68% (8% less than in 2019) do not believe in equality before the law, while 28% (7% up from 21% in 2019) do. Similar patterns as with efficiency are noted within individual economies. Bosnia and Herzegovina leads with the share of respondents distrusting equality before law (76%), followed by Serbia (58%, 19% less than in 2019).

Figure 113: Do you agree that, in your economy, the law is applied to everyone equally?

(All respondents, N=6000, scale from 1 to 4, share of total, %)

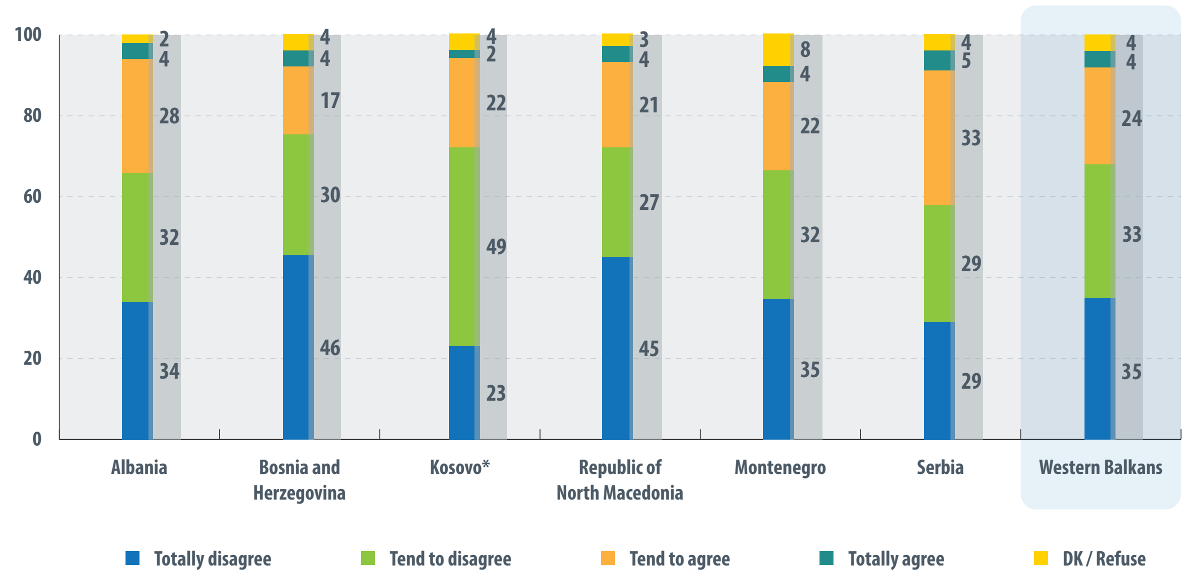
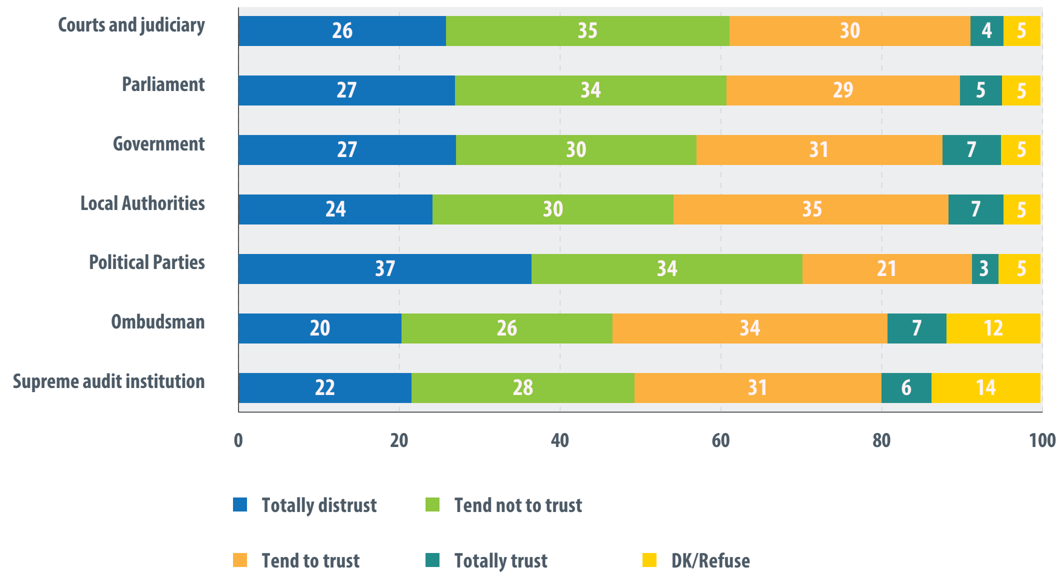


Figure 114: How much do you trust certain institutions?

(Results for the Western Balkans region) (All respondents, N=6000, scale from 1 to 4, %)



This Barometer round was expanded to include local authorities and political parties. Overall, all of them rank (from the most to the least trusted) as follows: local authorities, ombudspersons, governments, supreme audit institutions, parliaments, courts and political parties. Distrust in courts and parliaments has declined by 5 points to 61%, while 57% of respondents distrust their governments. Local authorities, the most trusted institutions, enjoy the confidence of 42% of respondents. Political parties (at 71%) are the most distrusted.

Despite incremental improvements, the level of trust in institutions in individual economies does not exceed half of respondents (apart from the case of Serbia regarding government and local authorities, with 58% and 51% respectively). Thus, while Serbia respondents lead in the level of trust in the government (58%), Bosnia and Herzegovina and Kosovo* (both at 71%) are the most distrustful. Kosovo* has the highest level of distrust in the parliament (71%). The ombudsman institution is most trusted in Albania (50%) and least trusted in the Republic of North Macedonia (36%). Political parties are distrusted by 78% of respondents in Bosnia and Herzegovina (the highest) and 63% in Montenegro (the lowest). Most notable trends concern the judicial system: a 29-point decrease in distrust in Montenegro (from 82% in 2019 to 53%) and a 26-point increase in distrust in this system in the Republic of North Macedonia (from 44% in 2019 to 70%).

In line with the high level of distrust in institutions, over half of respondents in the region disagree with the proposition that judicial systems, ombudsperson institutions, supreme audit institutions and media are independent of political influence. They rank (from the most to the least independent) as follows: ombudsperson institutions, supreme audit institutions, media and judicial systems. Judicial systems remain perceived as the least independent: over two-thirds (67%) disagree that they are independent, while about a quarter (27%) agree. Ombudsperson institutions are perceived as the most independent: one-third (36%) think they are independent, while 53% disagree.

Figure 115: How much do you trust certain institutions?

A - Courts and judiciary; B – Parliament; C – Government; D – Local authorities: E- Political Parties F-Ombudsman; G - Supreme audit institution

(Results by economies) (All respondents, N=6000, scale from 1 to 4, %)

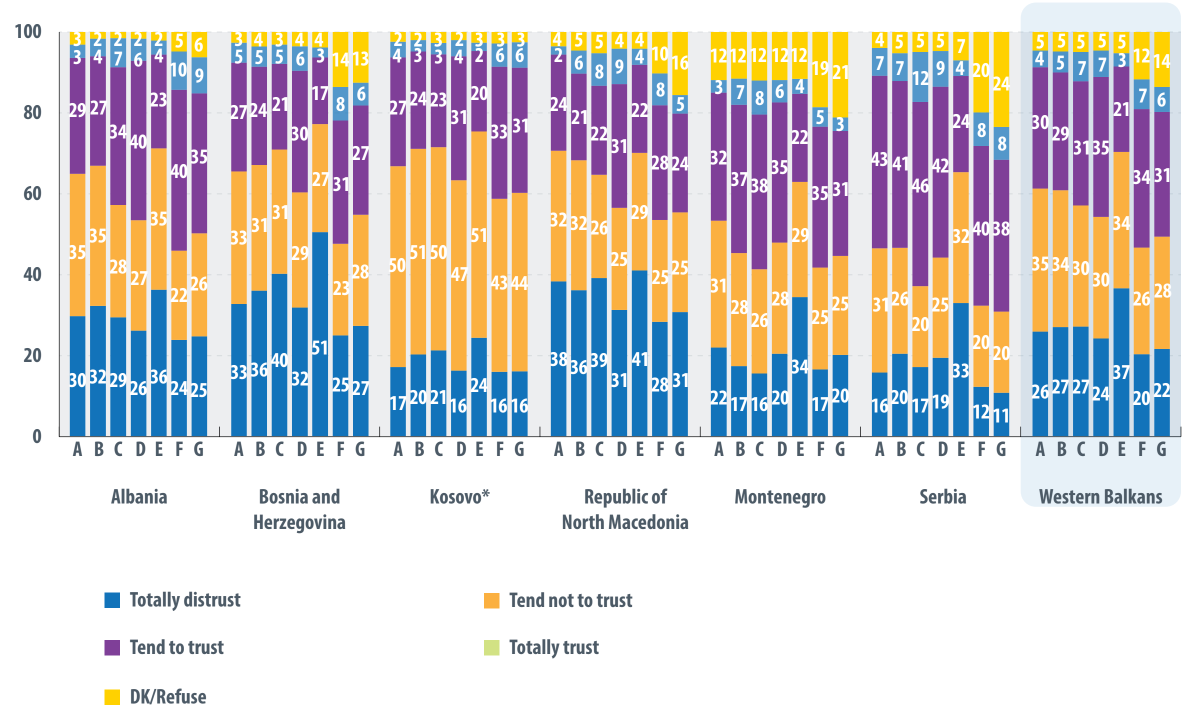


Figure 116: Do you agree that the following institutions are independent of political influence?

(Results for the Western Balkans region) (All respondents, N=6000, scale from 1 to 4, %)

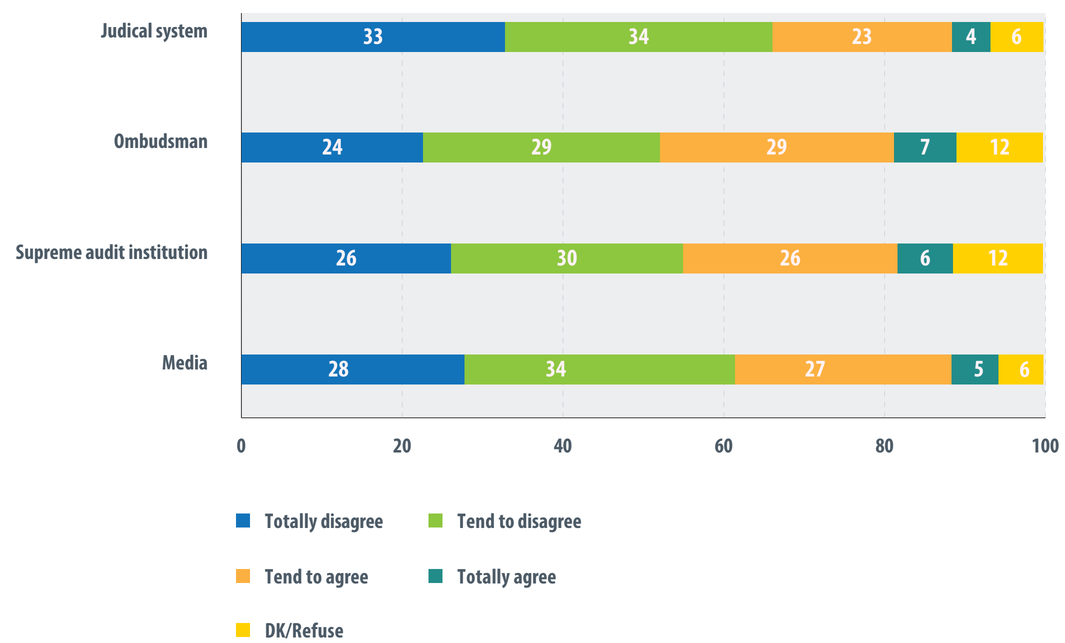
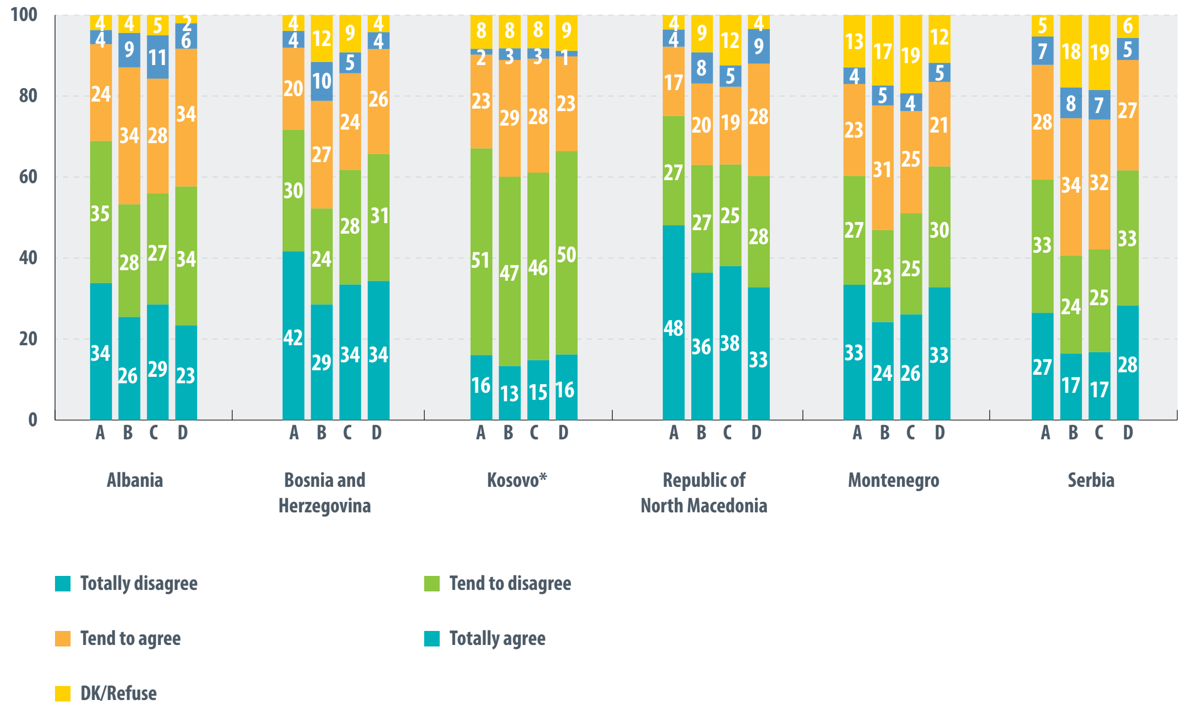


Figure 117: Do you agree that the following institutions are independent of political influence?

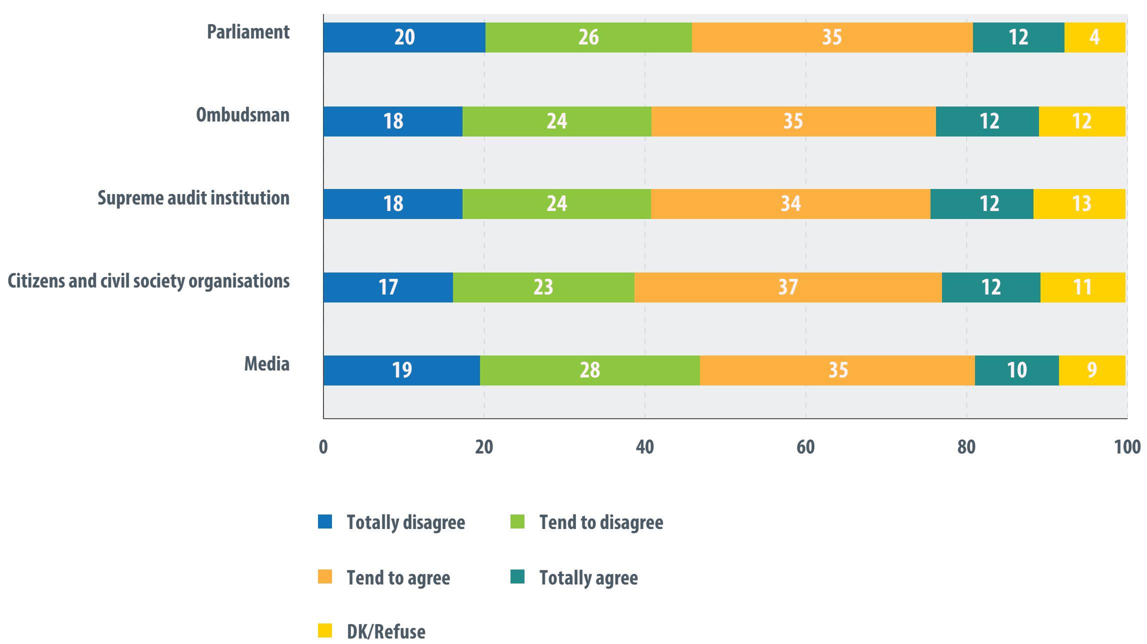
A – Judicial system; B – Ombudsman; C - Supreme audit institution; D - Media

(Results by economies) (All respondents, N=6000, scale from 1 to 4, %)



118: Do you agree that the following institutions can effectively scrutinise the government and make it accountable to citizens?

(Results for the Western Balkans region) (All respondents, N=6000, scale from 1 to 4, %)



Perceived independence of the judiciary from political influence has deteriorated most significantly in the Republic of North Macedonia (with distrust having increased by 25 points, from 50% in 2019 to 75%), while it improved most notably in Montenegro (with distrust having decreased by 25 points, from 82% in 2019 to 60%).

The Republic of North Macedonia has the highest share of respondents who disagree that their ombudsperson institution is independent of political influence (63%) and has seen the most significant increase (by 19%, from 44% in 2019).

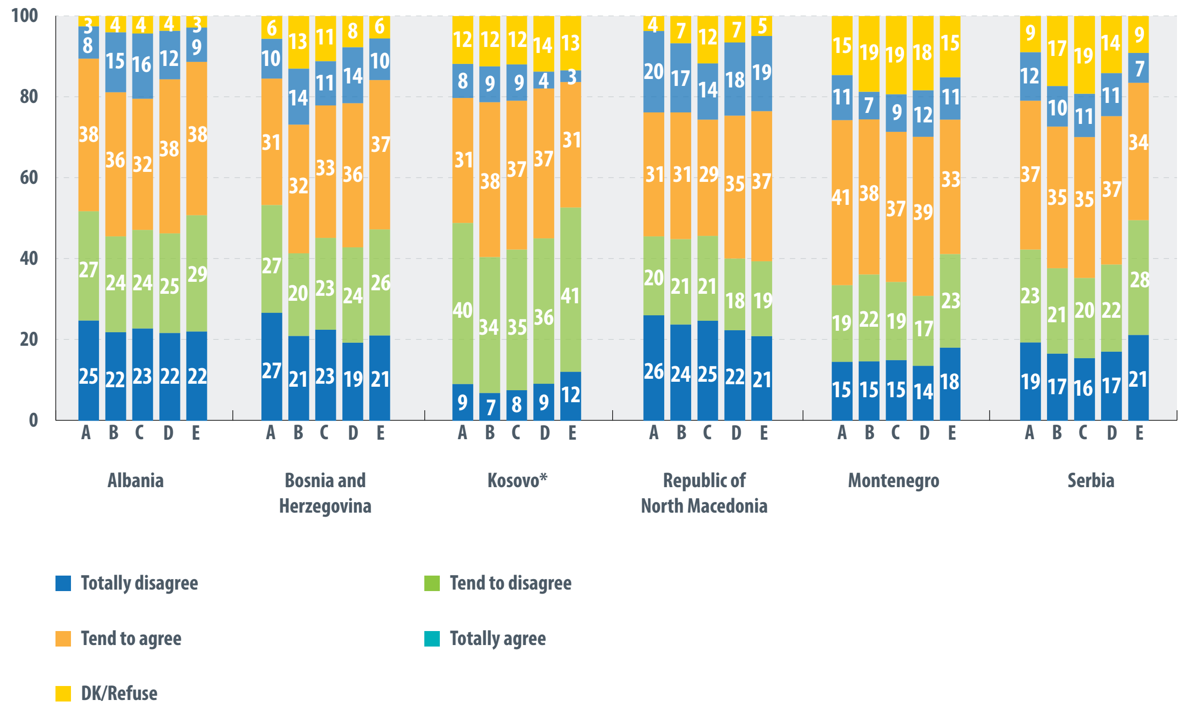
Media are in a similar position. They are seen as the freest from political influence in Albania (40%) and the least free in Kosovo* (24%), which is the most significant drop (by 15%, from 39% in 2019). Along similar lines, supreme audit institutions are perceived as not independent of political influence by most citizens in all economies. They are seen as the most independent in Albania and Serbia (39% in both) and the least independent in the Republic of North Macedonia (24%).

While the overall level of actual independence of key independent institutions remains perceived as low, expectations are much higher when it comes to them and other actors being capable of scrutinising governments and making them accountable to citizens. Such expectations are also slightly higher than in the previous year. The highest share of respondents (49%) sees citizens and CSOs as capable of scrutinising governments and making them accountable to citizens. Parliaments and ombudsperson institutions are seen as capable of doing so by 47%, followed by supreme audit institutions (at 46%) and media (at 45%).

Figure 119: Do you agree that the following institutions can effectively scrutinise the government and make it accountable to citizens?

A – Parliament; B – Ombudsman; C - Supreme audit institution; D - Citizens and civil society organisations; E - Media

(Results by economies) (All respondents, N=6000, scale from 1 to 4, %)



Focusing on individual economies, the media enjoys the highest level of support, followed by citizens and CSOs, parliaments, ombudsperson institutions and supreme audit institutions.

The media is supported in this role by 56% of respondents of the Republic of North Macedonia and enjoys the lowest level of support in Serbia (41%). Citizens and CSOs enjoy the highest level of support in the Republic of North Macedonia (53%) and the lowest in Kosovo* (41%).

Parliaments are supported in this role by 52% of respondents in Montenegro, as opposed to 39% in Kosovo*. Ombudsperson institutions are supported by 51% in Albania, as opposed to 45% in Montenegro. Lastly, supreme audit institutions enjoy the highest support in Albania (48%) and an equal level of support (46%) in Montenegro and Kosovo*. The lowest support is expressed in the Republic of North Macedonia (43%).

PERCEPTIONS OF CORRUPTION

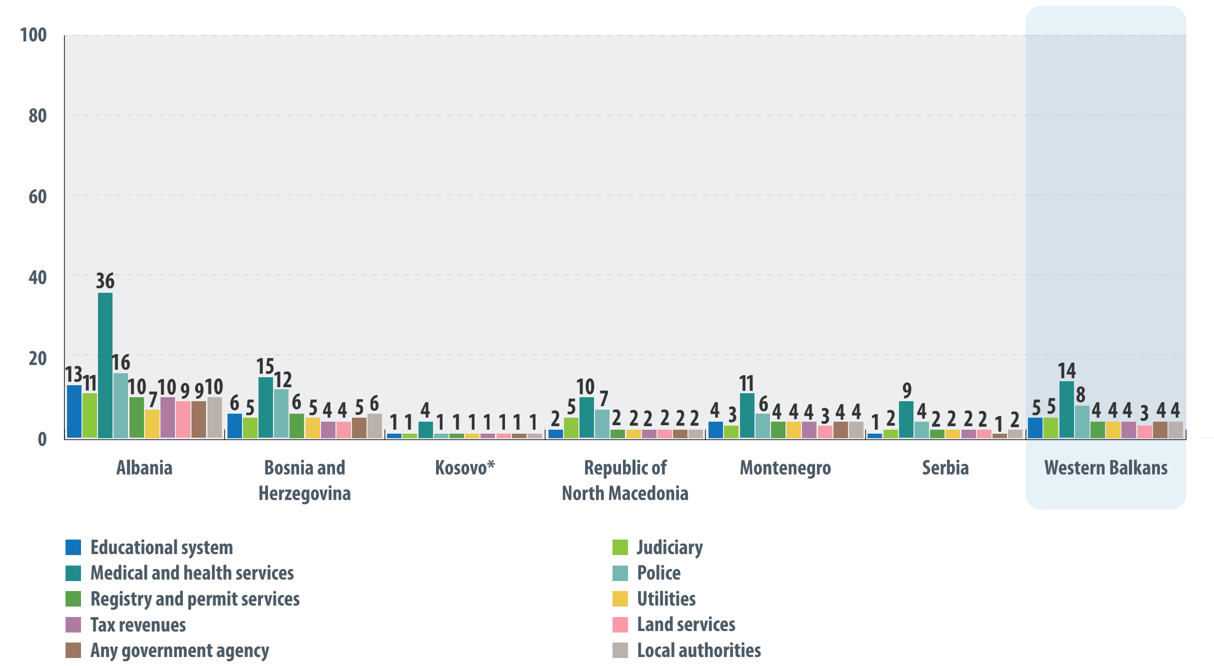
As for corruption, the trend has gone unchanged since 2019, as healthcare and rule of law institutions are still considered the most corrupt both in terms of vulnerability to bribes and general perception of corruption within them. Healthcare services have been allegedly bribed by a regional mean of 14% of respondents, followed by police (at 8%). On the other hand, healthcare services (at 74%), judiciaries (at 76%) and customs (at 75%) are among top five categories that are perceived as the most corrupt. These five also include political parties (at 78%) and parliaments (at 71%).

Differences between individual economies in all these segments are also rather small, showing it to be a systematic problem in all societies. What makes the situation even less hopeful is that most (a 59% regional rate) believe that corruption is not being fought successfully. The third concern is a low level of perceived trust in meritocracy in the public sector, with most respondents (a 7.2 scale, from 7.0 in 2019) convinced that connections rather than hard work guarantee success.

Measured by vulnerability to bribes in the past 12 months, healthcare remains to be perceived as the most corrupt sector by far. It has been allegedly bribed by 14% of respondents in the region. The second most corrupt sector are the police (8%). Education and judiciary are perceived as less bribed sectors (both at 5%); followed by registry and permits services, utilities, tax services, local authorities and any other governmental agency (all at 4%). Land services (at 3%) are perceived as the least bribed.

Figure 120: In your contact or contacts with the public institutions, have you or anyone living in your household paid bribe in any form in the past 12 months?

(Respondents who replied "Yes", n=6020, %)



Focusing on individual economies, Albania is by a significant margin more prone to bribing than other economies in all ten areas covered by this round of the survey. Kosovo*, with only between 1% and 4% of respondents having given bribes during the previous 12 months, is the least vulnerable to this form of corruption. The health sector in Albania stands out as the most vulnerable (36%), followed by the police (16%).

Looking at the region as a whole, eleven of thirteen categories surveyed in this round are perceived as corrupt by at least half of respondents, while over half of them are perceived as corrupt by about three-quarters. Despite some fluctuations since 2019, ranking of five most corrupt categories has not changed: political parties (78%), judiciary (76%), customs (75%), healthcare services (74%) and parliaments (71%). The five least corrupt ones are the following: militaries (38%), religious organisations (39%), NGOs (51%), businesses (57%) and education systems (62%).

Within individual economies, Bosnia and Herzegovina is home to three most corrupt categories (political parties, police and customs). At 88%, it has replaced Albania as the economy where political parties are seen as the most corrupt actor. Montenegro (with 70.1%) is on the other end of the scale.

82.7% of participants in Bosnia and Herzegovina find their judiciary to be the most corrupt actor, followed by the Republic of North Macedonia (81.1%, down from 89% in 2019) and Albania (79.6%, down from 90% in 2019). Montenegro (65.5%) ranks on the other end of the scale in this category as well. Customs are perceived as corrupt by 83.5% of respondents in Bosnia and Herzegovina, followed by the Republic of North Macedonia (79.4%, down from 86%) and Albania (78.3). Montenegro (67.1%) is again on the other end of the scale.

Figure 121: To what extent do you agree or not agree (see) that the following categories in your economy are affected by corruption?

(Results for the Western Balkans region) (All respondents, N=6000, scale from 1 to 4, %)

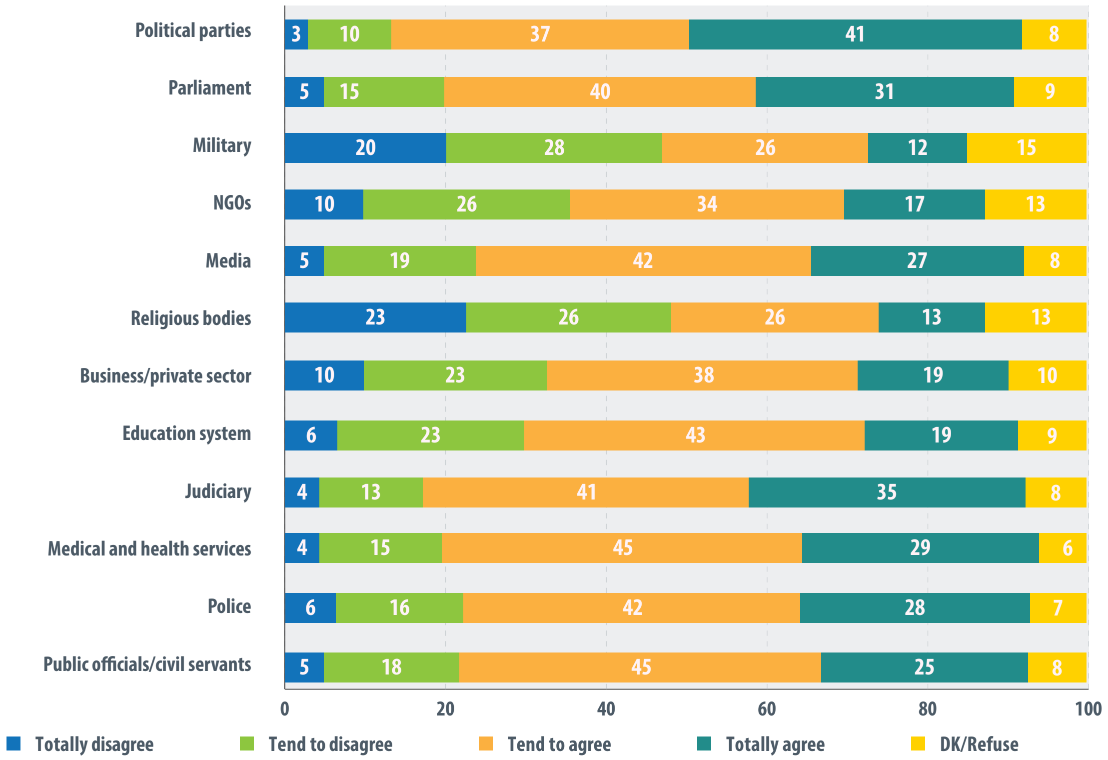


Table 2: To what extent do you agree or not agree (see) that the following categories in your economy are affected by corruption?

(Results by economies) (All respondents, N=6000, scale from 1 to 4, "totally agree + tend to agree", %)

	Albania	Bosnia and Herzegovina	Kosovo*	Republic of North Macedonia	Montenegro	Serbia
Customs	78.3	83.5	70.7	79.4	67.1	72.2
Political parties	79.5	88	78.7	78.5	70.1	75.8
Parliament	77.2	80	75	74.1	58.1	62.8
Military	31.5	51.9	35.9	37.1	42.9	26.5
NGOs	37.7	61.1	53.1	54.5	53.2	49.2
Media	58.1	80.4	65.4	68	67.6	71.6
Religious bodies	25.3	53.9	42	40.2	38.4	34.5
Business/private sector	37	75.2	57.3	58.5	58.2	55.7
Education system	57.5	72.7	67.3	58.4	56.5	57.2
Judiciary	79.6	82.7	72.4	81.1	65.5	71.3
Medical and health services	80.4	83.1	71.7	71.4	65.4	72.7
Police	71.2	83.8	57.8	72.8	67.8	69.5
Public officials/civil servants	69.5	82.9	65	66.4	68.1	69.3

Despite a slight improvement since the previous round, trust in meritocracy in the public sector remains low in the region. At a 7.2 (from 7.0 in 2019), most respondents think that connections rather than hard work guarantee success. On the other hand, at 5.3 (up from 5.1 in 2019), the share of those who agree with the proposition that people succeed in the public sector if they are willing to work hard remains worrying.

Of all economies, respondents in the Republic of North Macedonia who agree at 7.5 level on the scale that hard work is no guarantee of success in the public sector are the least trustful in meritocracy. Albania has deteriorated the most in terms of trust in meritocracy (6.5 down from 7.7 in 2019). On the other hand, participants from the Republic of North Macedonia (5.6, up from 4.8 in 2019) are also the most trustful in meritocracy in the public sector.of the scale in this category as well. Customs are perceived as corrupt by 83.5% of respondents in Bosnia and Herzegovina, followed by the Republic of North Macedonia (79.4%, down from 86%) and Albania (78.3). Montenegro (67.1%) is again on the other end of the scale.

Figure 122: To what extent do you agree or not agree with the next statements?

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.

(All respondents, N=6000, scale from 1 to 10, mean)

Figure 123: Do you agree that written information of your Government (such as laws, decisions, web pages, forms) is overall easy to understand and uses plain language?

(All respondents, N=6000, scale from 1 to 4, share of total, %)

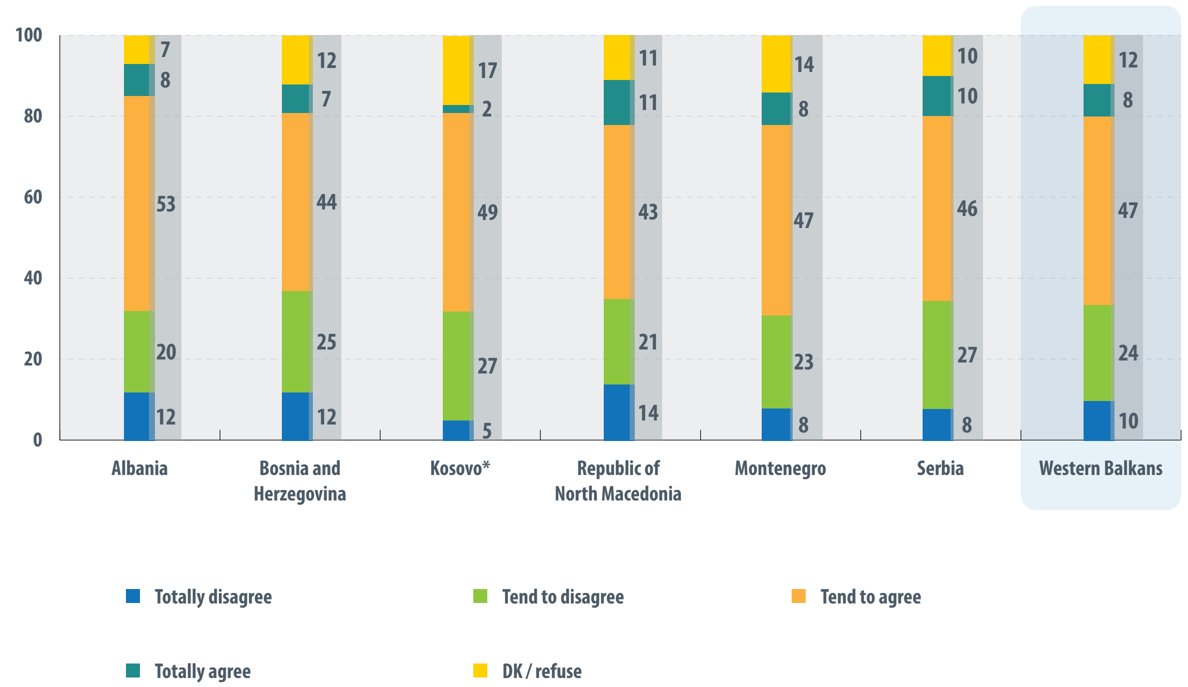
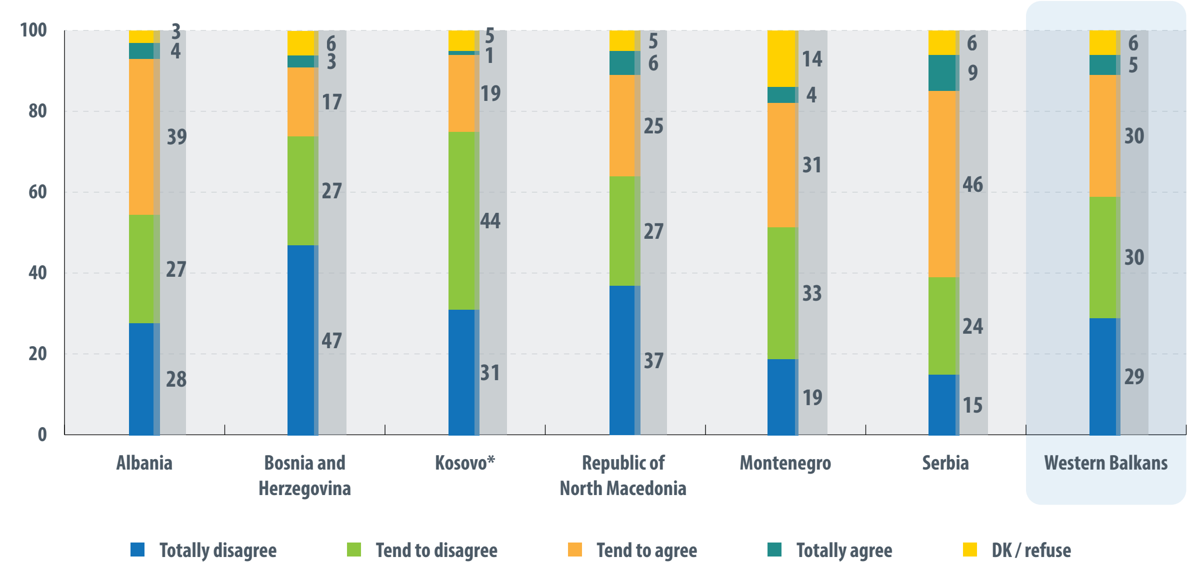


Figure 124: Do you agree that, in your economy, the government fights corruption successfully?

(All respondents, N=6000, scale from 1 to 4, share of total, %)



The share of respondents in the region who find government's written information easy to understand has increased slightly. 55% agree that this is the case, while 34% disagree.

Albania has the highest share of respondents (61%, 16 points up) who find government's information easy to understand, followed by Montenegro (55%) and Kosovo* (51%). Bosnia and Herzegovina remains on the other end of the scale: it has the highest proportion of respondents who find government's information difficult to understand (37%), despite a 19-point drop (from 56% in 2019).Overall, results show a slightly more positive picture of fighting corruption than last year. However, well over half (59%) of respondents think that it is not being fought successfully, as opposed to 35% who say it is.

With 55% of respondents positive about corruption being fought successfully, Serbia is the most optimistic economy and has also improved most significantly (a 27-point hike from 28% in 2019). Bosnia and Herzegovina and Kosovo* remain the most pessimistic economies by quite a wide margin: only 20% in both economies agree, as opposed to 74% and 75%, respectively, who disagree.

PARTICIPATION IN DECISION-MAKING

There is a clear correlation between low trust in institutions and government's performance and the level of apathy towards government decision-making. Over one-third of respondents admit to have never discussed government affairs during the last year. 39%, which is significantly more than in 2019 (25%) feel totally disinterested, while 20% feel powerless of their ability to influence government's decisions.

Hand in hand with slight improvements in perception of the role of citizens and civil society as safeguards against executive's excesses, of anticorruption policies and of meritocracy in the public sector, the region has seen a 5-point decrease (37%) in the share of respondents admitting to have never discussed government affairs (from 42% in 2019). Yet, overall, the proportion of respondents engaged in politics in some form (59%) has not changed much since (57%). Discussing government affairs with friends and acquaintances remains most frequently practiced (by 28% of respondents), followed by participation in protests and public debates (18%) and online activism (13%).

Serbia, with 46% of participants never engaging in any discussion on government affairs, has replaced Montenegro as the most passive economy. Kosovo* has the highest share of respondents who discuss government affairs with friends and acquaintances (44%, 11% more than in 2019). Albania, meanwhile, leads the region in terms of willingness to attend public debates and protests (23%), while Serbia (9%) lies on the other end of the scale. Kosovo*, where 16% commented government decisions online, is the economy with the highest participation in terms of active online presence.

Though political engagement in the region has slightly improved, total disinterest of participants has improved (from a quarter to 39%). 20% feel powerless to influence government decisions, 18% prefer not to be publicly exposed and 15% explain their passivity with absolute trust in the work of elected representatives.

In individual economies, there is a worrying trend of political disengagement in Kosovo* and Albania. In the former, over two-thirds of disengaged respondents (67%, 33 times more than in 2019) refused to answer the question and 26% do not care about government decision-making. Apathy level in Albania, where 50% do not care about government decision-making or did not give an answer, has more than doubled (from 21% in 2019). Open distrust in the government is the highest in Bosnia and Herzegovina (20%) and the lowest in Kosovo* (4%, 17 points down from 21% in 2019).

A self-perception of powerlessness is the highest in Montenegro (31%) and the lowest in Kosovo* (2%), these two having seen opposite trends since 2019: a 14-point hike in the latter and a 14-point drop in the former. On the other hand, Serbia has the highest share of partakers (25%) who have absolute trust in their government (up from 16% in 2019), as opposed to Kosovo* (at 0%, down from 9% in 2019).

Figure 125: Have you ever done something that could affect any of the government decisions?

(All respondents, N=6000, multiple answers, share of total, %)

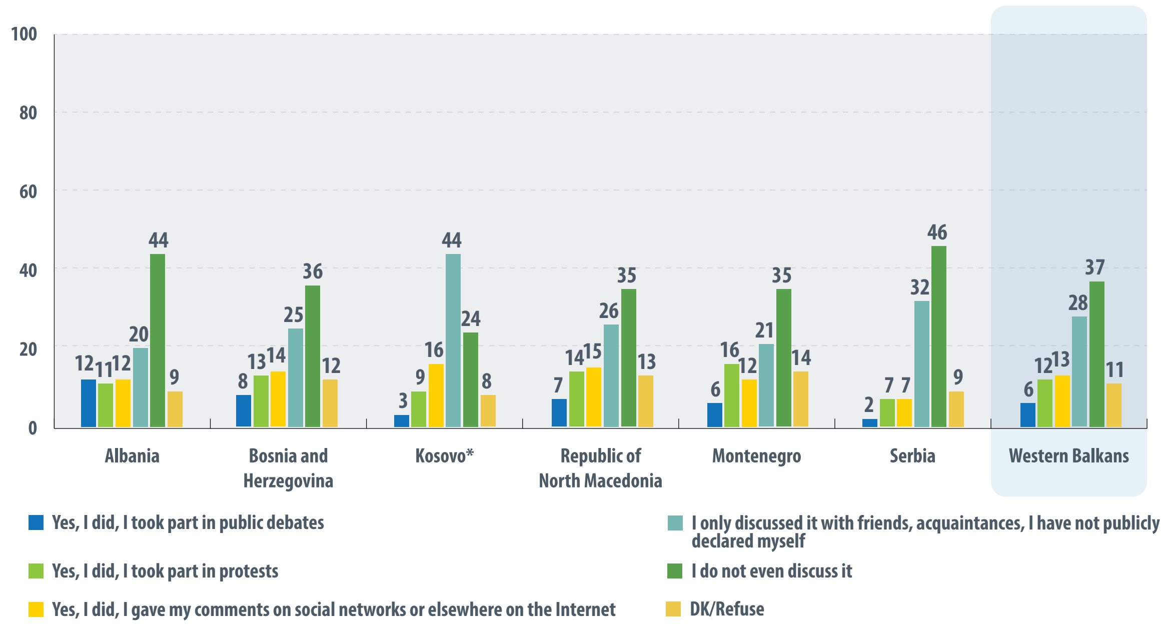
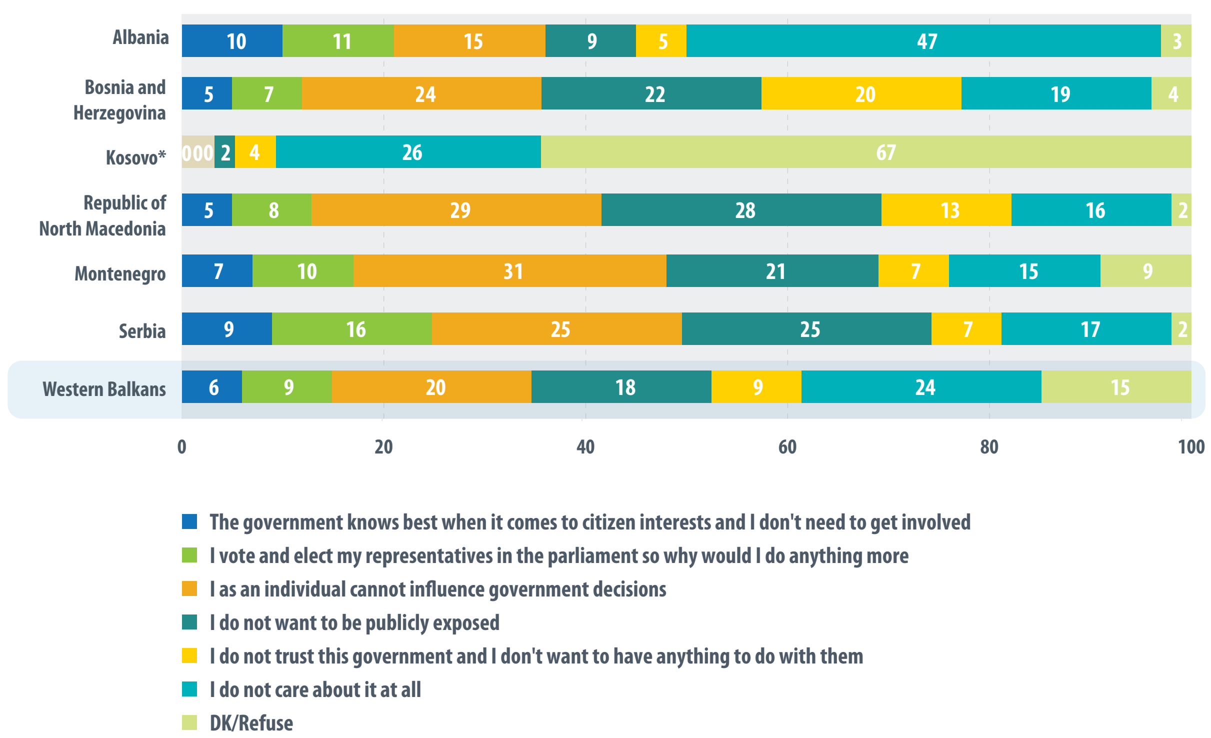


Figure 126: What is the main reason you are not actively involved in government decision-making?

(Those who have never done anything which could affect government decision, N=4544, share of total, %)



RULE OF LAW

Incremental improvements in citizens' trust in judiciaries in the region are based upon and correlate with ratings of such institutions' performance, measured here along the criteria of length of proceedings, accessibility, cost of proceedings, execution of judgements, and transparency. Overall, less than one-third of respondents assess judiciaries' performance positively, while over half rate it negatively.

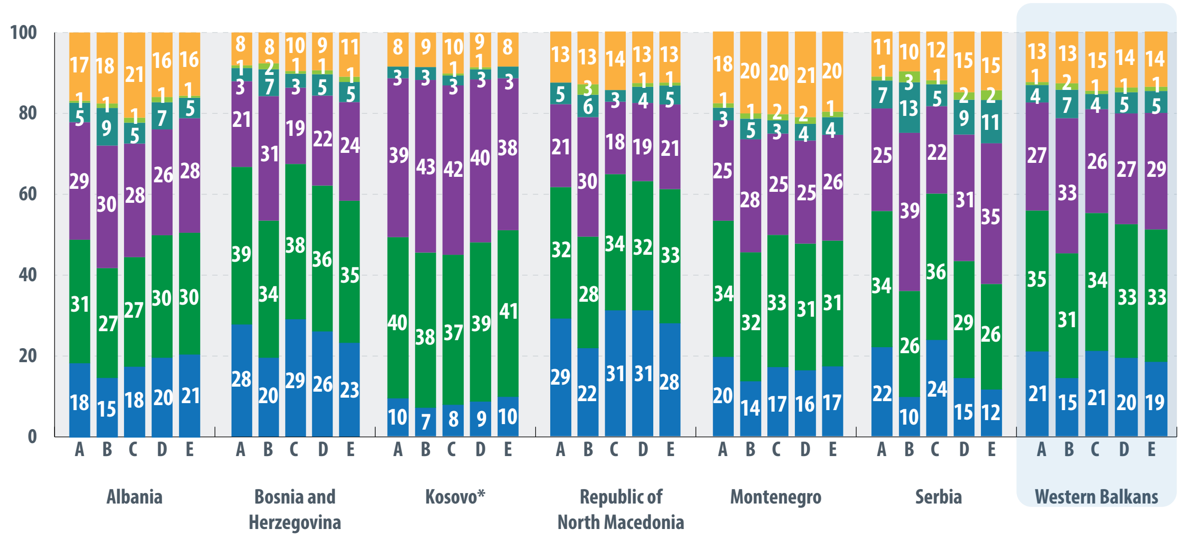
The length and cost of proceedings are rated negatively by 56% and 55% of respondents, respectively, while execution of judgments and transparency are viewed negatively by 53% and 52%, respectively. Last but not least, they were rated better on accessibility (46% versus 42% in favour of positive rating).

A worrying trend is that citizens find judiciaries more accessible, yet too costly. Serbia has the biggest share of respondents rating it accessible (55%), as opposed to Albania (40%), while negative rating stands at 54% in Bosnia and Herzegovina. Montenegro, with a 13-point hike in negative rating and a 14-point drop in positive rating, has deteriorated most significantly. With 67% of participants rating its cost negatively, Bosnia and Herzegovina's judiciary is the costliest in the region, while Kosovo* has the highest share of respondents (46%) rating this cost positively.

Figure 127: How would you rate the justice system in terms of:

A – Length of proceedings; B – Accessibility; C – Costs of proceedings; D – Execution of judgements; E – Transparency?

(All respondents, N=6000, scale from 1 to 5, share of total, %)



Very poor
Poor
Good
Very good
Excellent
DK/Refuse

PERCEPTION OF THREAT & PRESENT SITUATION ASSESSMENT

Threat perception and present situation assessment is a new section of the Barometer introduced in this round, focusing on the COVID-19 pandemic. The largest majority (74%) of respondents perceive a high level of threat to their national economies, and lower threat levels for the economy in the region and globally.

In addition, nearly half (43%) are concerned about losing their own or their family members' jobs in the next 12 months. Meanwhile, 46% report that their income has decreased. Within individual economies, unemployment is actually more worrying for citizens than the virus itself. It is seen as a concern by majorities between 57% and 69%, except in Serbia (37%).

Coronavirus, on the other hand, is a concern for 59% to 62% of respondents in individual economies. On other aspects of the pandemic impact, health concerns for themselves and others are shared by 62% and 56% of participants, respectively. Others, though less in number, report feelings of anger and loneliness caused by anti-pandemic restrictions.

This situation is aggravated by a feeling of helplessness in the middle of a health and economic crisis. On average, nearly half of respondents (48%) do not think that their governments have increased transparency of their work towards the public during the pandemic. sus 42% in favour of positive rating).

A worrying trend is that citizens find judiciaries more accessible, yet too costly. Serbia has the biggest share of respondents rating it accessible (55%), as opposed to Albania (40%), while negative rating stands at 54% in Bosnia and Herzegovina. Montenegro, with a 13-point hike in negative rating and a 14-point drop in positive rating, has deteriorated most significantly. With 67% of participants rating its cost negatively, Bosnia and Herzegovina's judiciary is the costliest in the region, while Kosovo* has the highest share of respondents (46%) rating this cost positively.

Figure 128: What level of threat do you think the coronavirus poses to each of the following?

A. The global economy; B. The Western Balkans region; C. Your national economy; D. Your local community; E. Your family; F. You personally

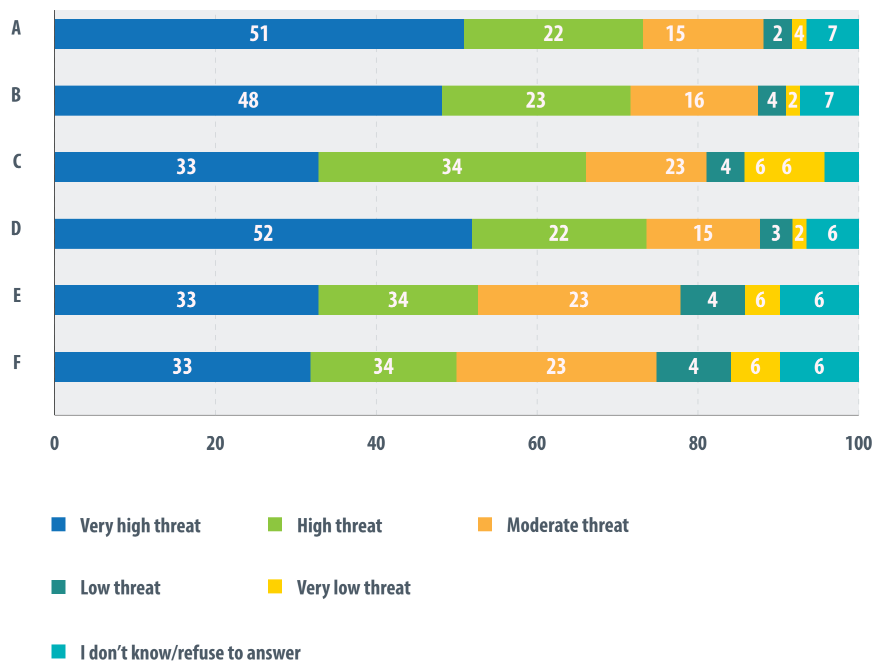
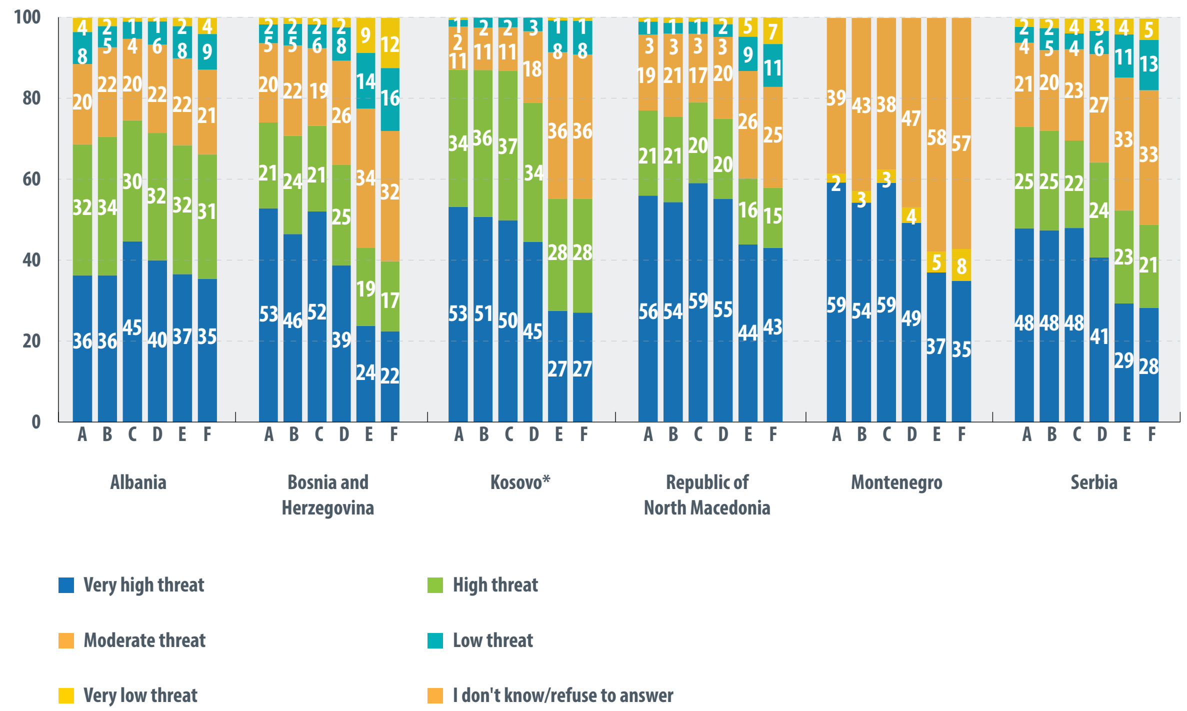


Figure 129: What level of threat do you think the coronavirus poses to each of the following?

A. The global economy; B. The Western Balkans region; C. Your national economy; D. Your local community; E. Your family; F. You personally



Around three-quarters of respondents (74%) in the region see a high level of threat from coronavirus to their national economies, 15% find the risk moderate and only 5% consider it low. The level of threat perception reduces as the scope narrows, reaching the lowest point at the personal level: half (51%) of them feel a high risk, one in four (25%) consider the threat to be moderate, and only 15% find it low. Given the pandemic's global impact, the ratio of

Focusing on economy context, at least half of respondents in all economies consider the threat to be high at all six levels. Respondents in Kosovo* feel most threatened by this virus: 87% see the threat equally high to the global economy, the region and their national economy. 55% in this economy find families and themselves at high risk, as opposed to Serbia, where 52% find their families at high risk and 49% find themselves at high risk).

Somewhat surprising results come from Montenegro, where the ratio of indifferent respondents across the board is extremely high, ranging between over one-third (39%) and two thirds (57%). Montenegro also has the lowest number of respondents perceiving a high level of threat to them personally, namely 35%. indifferent respondents (6% – 10%) is quite high.

Compared to the general level of threat, the COVID-19 pandemic is seen as less threatening to the jobs of respondents and/or their families. Overall, 43% consider it to be high, 38% moderate and 15% see a low level of risk.

Focusing on individual economies, respondents in Albania (53%) and the Republic of North Macedonia (49%) find their jobs to be the most threatened. On the other end of the spectrum, only 33% in Serbia think there is a high risk of losing their jobs due to COVID-19, followed by Bosnia and Herzegovina (36%). Kosovo* has the highest share of participants who perceive a moderate level of threat to jobs (55%)

Figure 130: To what extent is the COVID-19 pandemic a threat to your job or jobs of your family members?

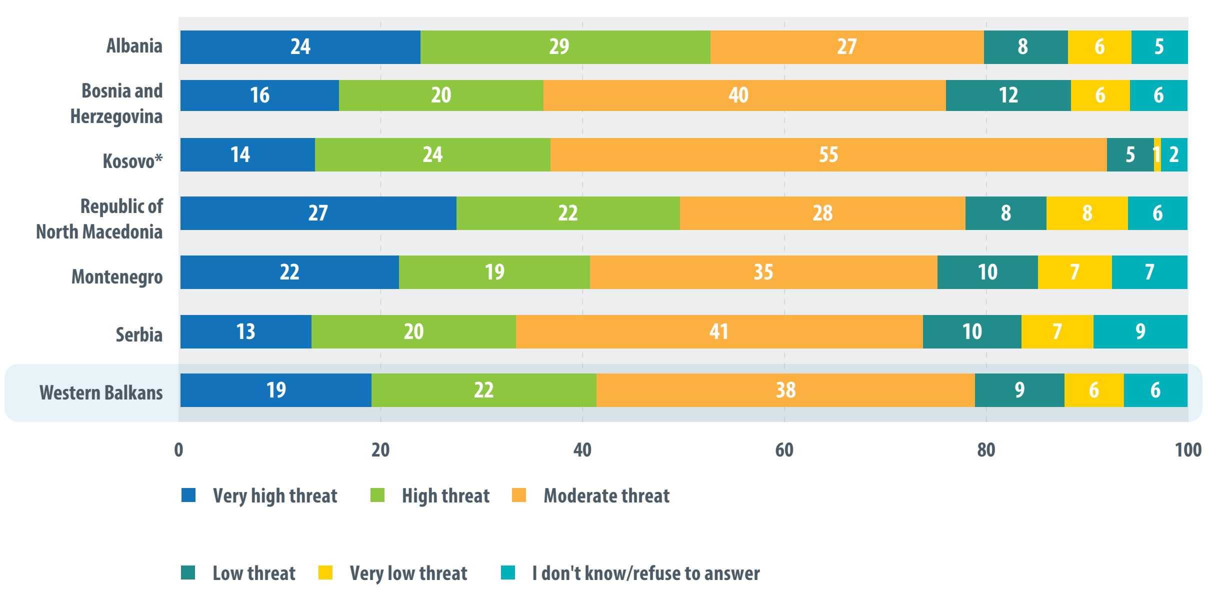


Figure 131: Personally, how concerned are you about losing your job in the next 12 months?

(All respondents, N=6000, scale from 1 to 5, share of total, %)

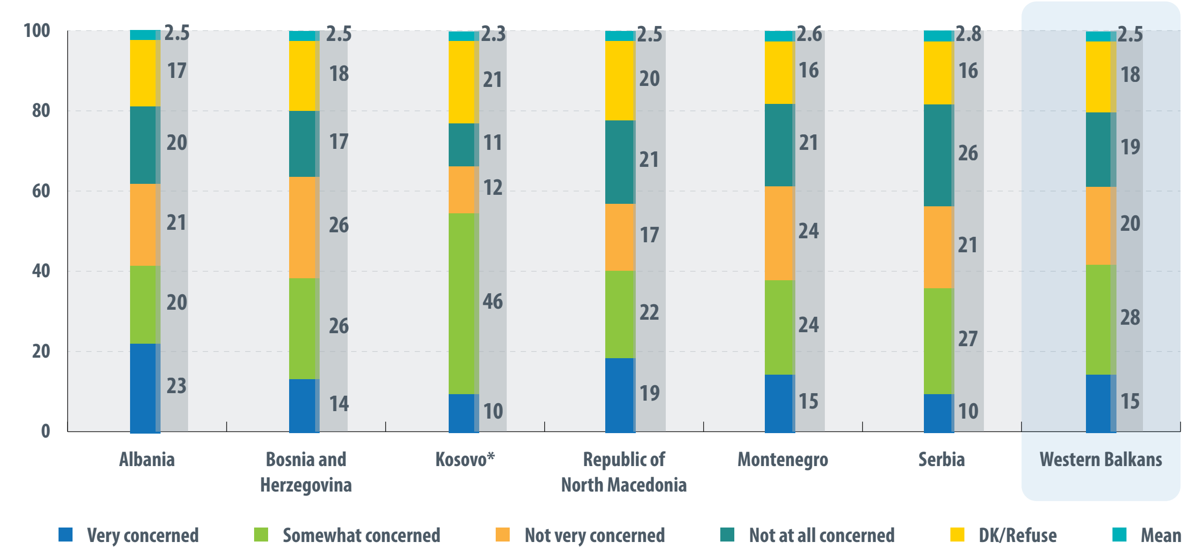
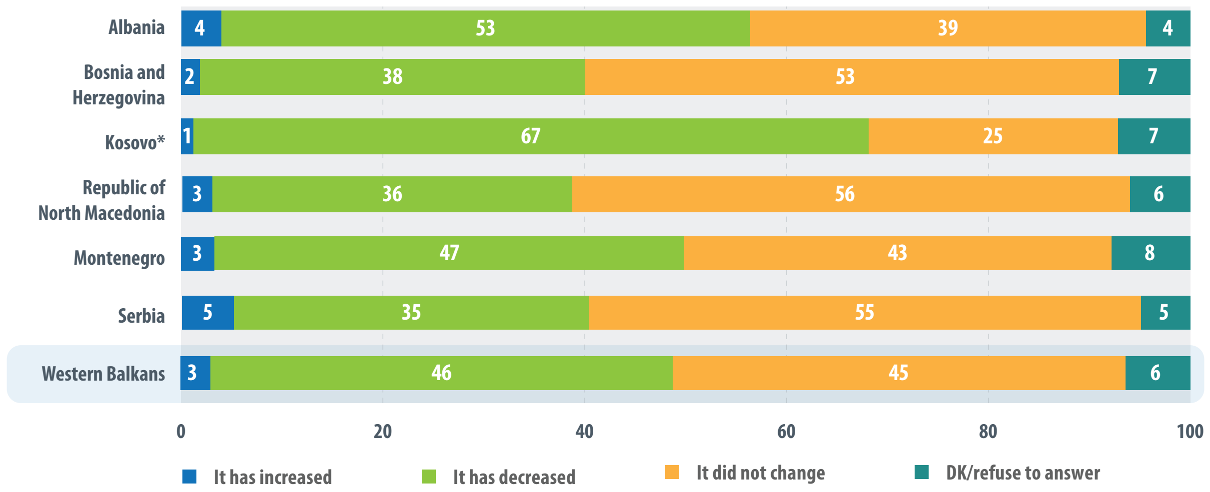


Figure 132: How has COVID-19 affected your income?

(All respondents, N=6000, scale from 1 to 4, share of total, %)

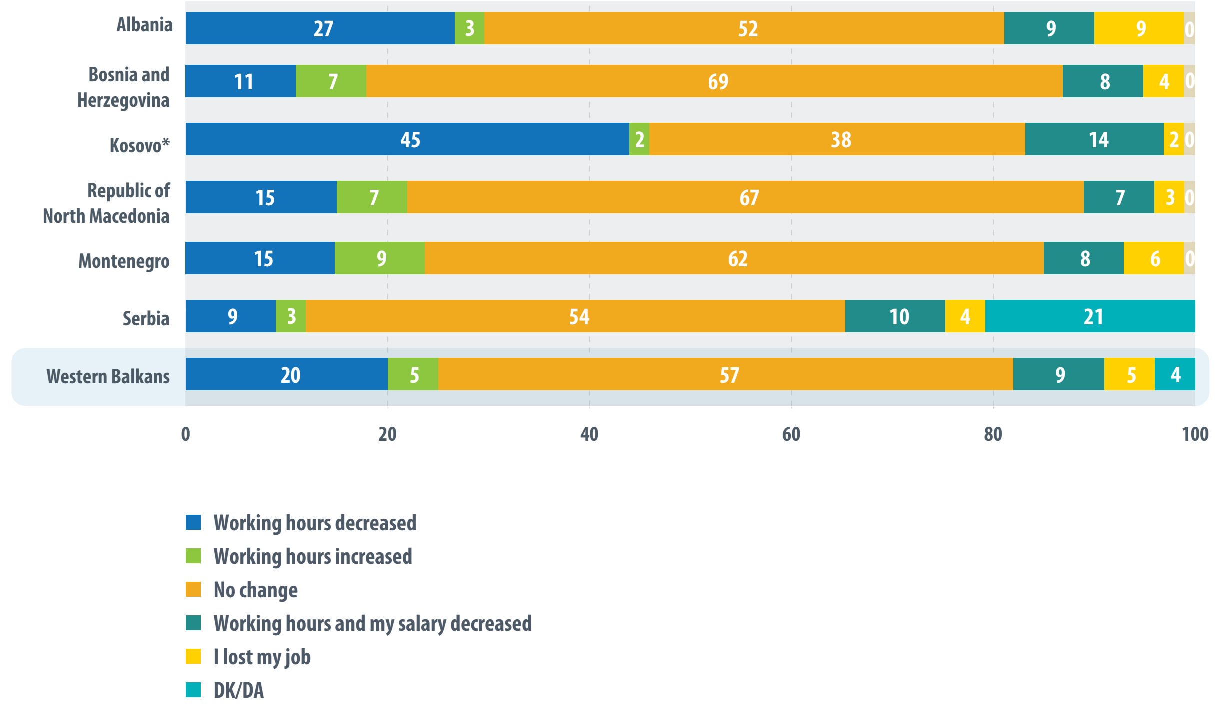


Future expectations regarding threats to jobs are similarly bleak. Overall, 43% of respondents worry about losing their jobs in the next 12 months, 39% are not concerned, and 18% do not know or did not answer. This puts the overall level of risk above the average (a 3 / 5 index). The highest level of risk to jobs is seen in Kosovo* (56% concerned and 23% not concerned) and the lowest in Serbia (37% concerned and 47% not concerned). A significant share of respondents (18% on average for the region) does not know or did not provide an answer.

Results show that the real impact of the COVID-19 pandemic on income seems to have been more widespread than the fear of losing one's job. Overall, 46% respondents report that their income has decreased, and 45% claim that it did not change. Within individual economies, incomes in Kosovo* are the most affected: 67% of respondents have seen their income decreasing, while 25% claim that it did not change. Income in Serbia is the least affected: 35% saw their income decreased, while 55% did not see any change.

Figure 133: How did COVID-19 affect your working hours?

(All respondents, N=6000, scale from 1 to 5, share of total, %)



While about a half of respondents saw the pandemic bringing down their income, the majority reported having to work the same number of working hours. 57% say their working hours did not change, 20% say they decreased, while 9% saw both working hours and wages decrease. The share of those whose working hours increased is the same as of those who lost their jobs altogether (5%), roughly in line with World Bank estimates on effects of the pandemic on economies of the region in 2020.

At economy level, over half of respondents in five economies saw no changes in their working hours. Bosnia and Herzegovina has the highest share of respondents whose working hours did not change (69%), followed by the Republic of North Macedonia (67%). In Kosovo*, by contrast, 45% had their working hours decreased, while 14% said both their working hours and salaries decreased. In Albania, 9% of citizens lost their jobs and another 9% had both their working hours and salaries fall.

Concerns about the weak and about one's health are two main worries in all economies of the region, the former expressed by 62% of respondents and the latter by 56%. 22% of citizens feel angry because of restrictions to their freedom and 9% feel lonely. Positive feelings are related to contentment about spending time with families (20%), impatience to get back to work (14%), and having had the time to learn new skills (8%). Albania is the economy with the highest share of respondents concerned about their health (72%), while such a risk is felt by 41% in Montenegro. Kosovo* has the highest number of those mainly worried about the vulnerable (71%), as opposed to Bosnia and Herzegovina (at 54%).

[9] World Bank, Recession Deepens as COVID-19 Pandemic Threatens Jobs and Poverty Reduction in Western Balkans, 22 October 2020, https://www.worldbank.org/en/news/press-release/2020/10/22/recession-deepens-as-covid-19-pandemic-threatens-jobs-and-poverty-reduction-in-western-balkans.

Figure 134: Which of the following best describes the way you are feeling amid coronavirus/COVID-19?

(All respondents, N=6000, scale from 1 to 8, share of total, %)

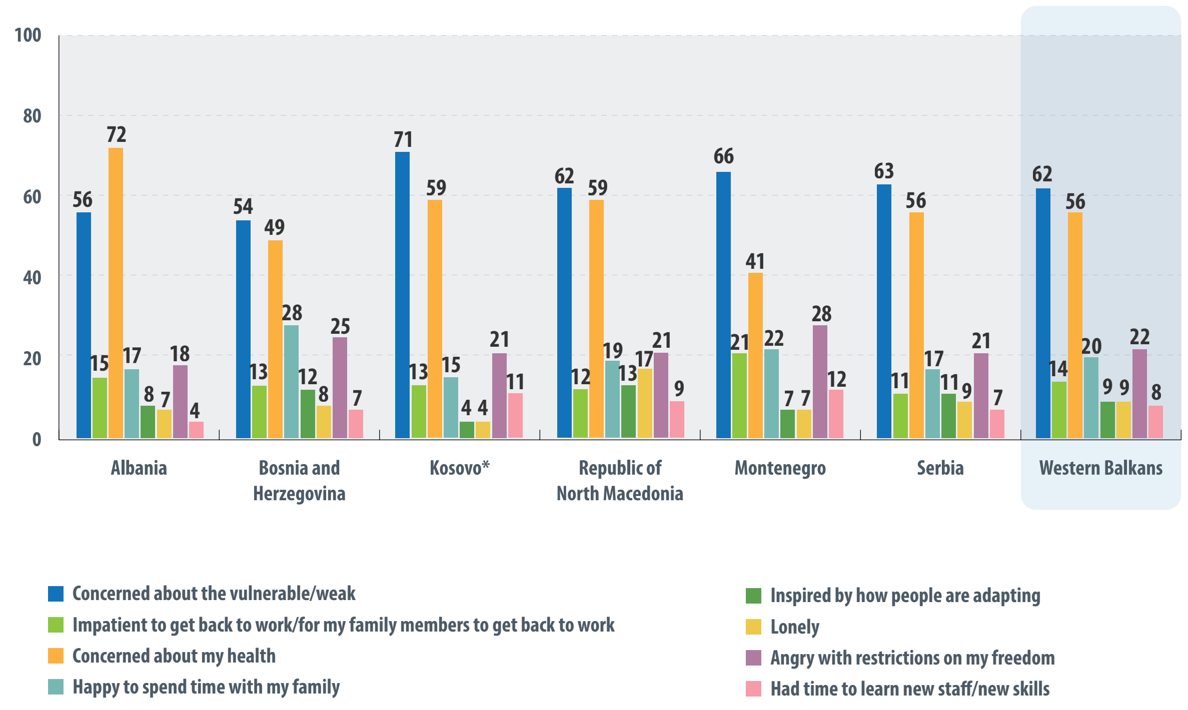
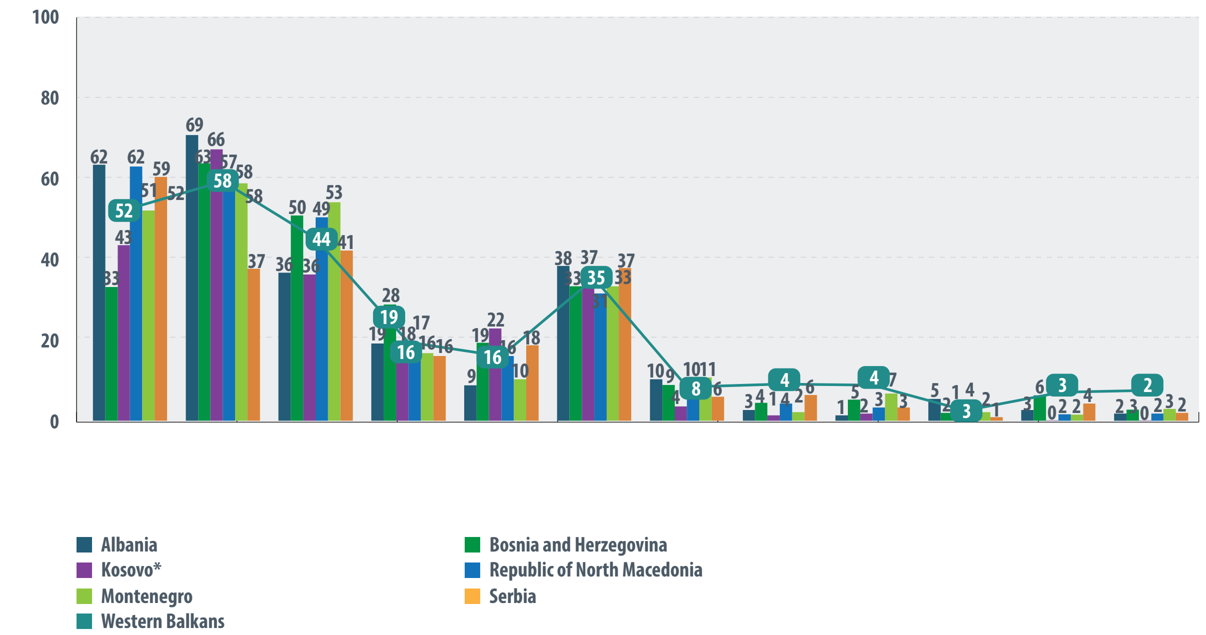


Figure 135: Which of the following topics do you find the most worrying in your economy amidst the pandemic crisis?

(All respondents, N=6000, scale from 1 to 12, share of total, %)



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Overall, there are more respondents who did not need to take on more family- and household-related responsibilities and tasks than those who did (45% versus 37%). Albania is the economy with the highest share of respondents in the region who had to take on more responsibilities (46%), as opposed to Bosnia and Herzegovina (24%). The latter also has the highest share of respondents who did not know or refused to give an opinion (12%).

Furthermore, Serbia has the highest proportion of respondents who did not take on more responsibilities (40%). Kosovo*, where 12% did not have to take on more responsibilities, lies on the other end of the scale. It also has the highest share of neutral respondents (44%).

Figure 136: I have had to take a lot more responsibility for household chores and care of children and family during this pandemic.

(All respondents, N=6000, scale from 1 to 8, share of total, %)

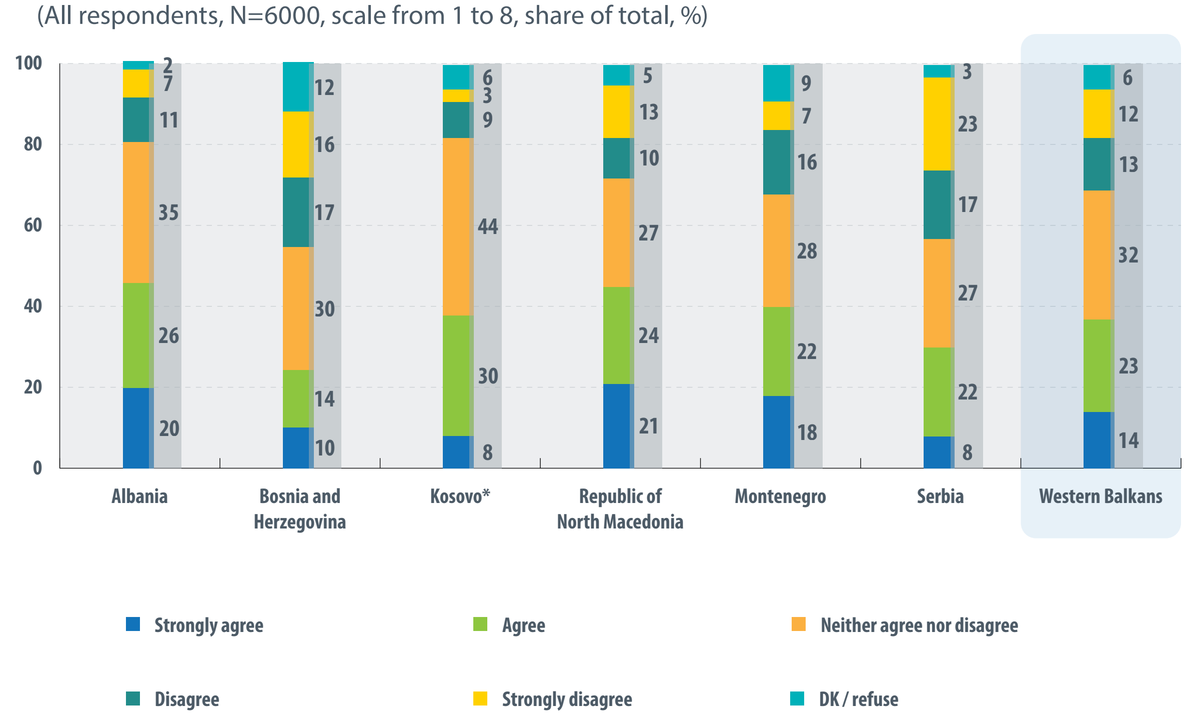
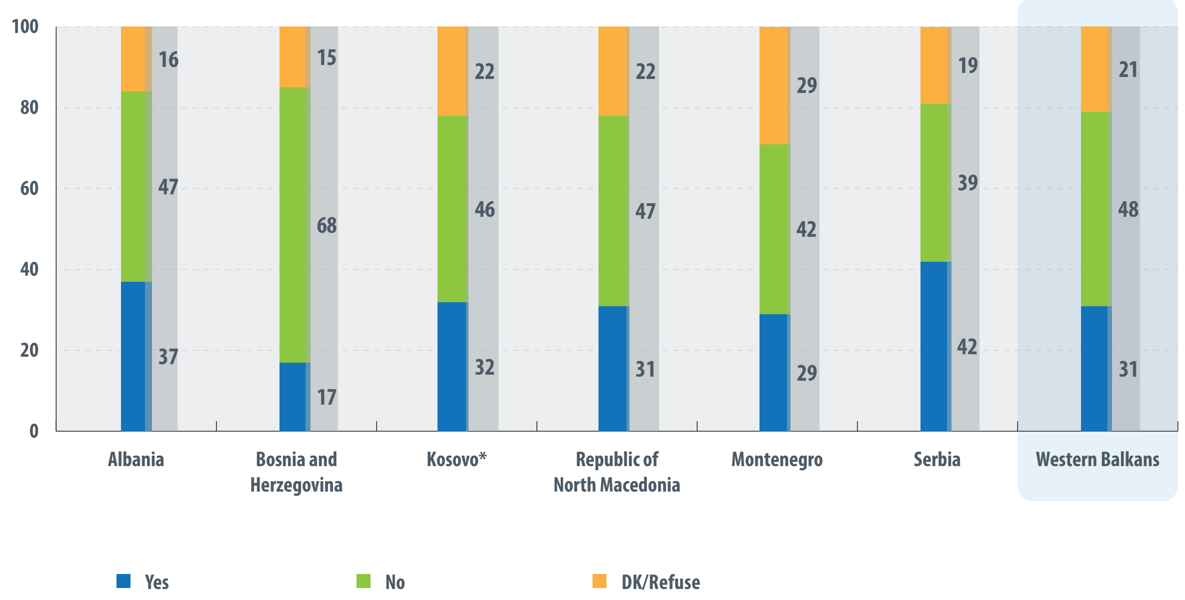


Figure 137: During COVID-19 outbreak, do you think that your government has increased the transparency of its work, particularly when it comes to public?

(All respondents, N=6000, scale from 1 to 8, share of total, %)



Along the high level of distrust in public institutions, 48% of respondents do not think that governments have increased transparency during the pandemic, 31% think that they have, and 21% showed no interest. Bosnia and Herzegovina is the most pessimistic with 68% disagreeing that their government has become more transparent, while 42% in Serbia think that this is the case with their government. Montenegro stands out as the economy with the highest share of those not interested in this issue (29%).

ASSESSMENT OF MITIGATION MEASURES

There is a widespread scepticism in the region over governments' efforts to protect people from losing their jobs during the COVID-19 pandemic. Main mitigation measures practiced by respondents include abstaining from public activities, regular health checks and/or testing of all staff of facilities, including strict use of personal protective equipment, cleaning and hygiene plans of facilities, compliance with social distancing rules and wearing face masks.

Overall, 26% of citizens prefer to abstain from public activities under pandemic restrictions. Of the health and safety measures, most favour regular health checks and/or testing of all staff of facilities, including strict use of personal protective equipment (16%), thorough cleaning and hygiene plans (13%), compliance with social distancing rules (12%) and wearing face masks (10%). 7% would engage in such activities regardless of health and safety measures in place. Within individual economies, Serbia has the highest share of abstaining population (43%), as opposed to Kosovo* (8%).

Figure 138: Due to health and safety measures imposed by COVID-19 pandemic, what is the most important when considering travel and outdoor activities, attractions and places to visit?

(All respondents, N=6000, scale from 1 to 8, share of total, %)

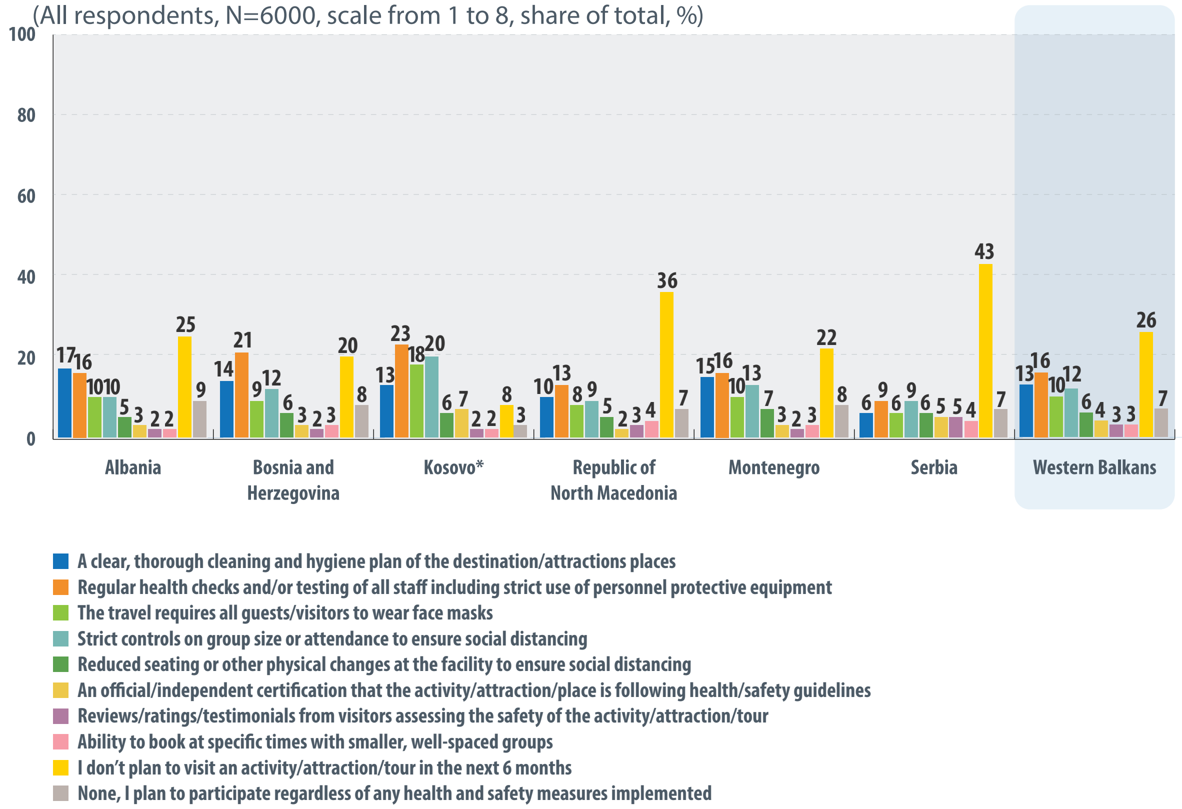
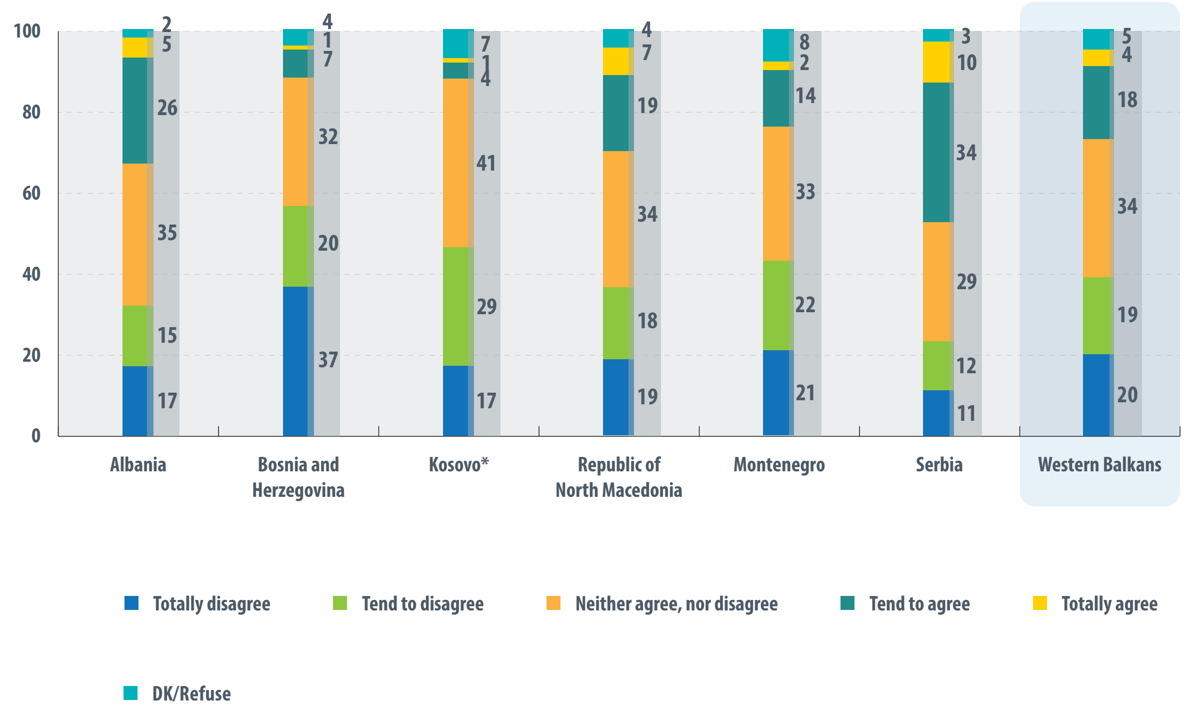


Figure 139: To what extent, if at all, do you agree or disagree, with the following statement: The Government is doing enough to protect people from losing their jobs?

(All respondents, N=6000, scale from 1 to 8, share of total, %)



Overall, 39% of respondents disagree that their governments are doing enough to prevent job losses, 34% are neutral and 18% agree that they are doing enough.

Within individual economies, the highest level of pessimism (57%) is in Bosnia and Herzegovina while 44% in Serbia say that their government is doing enough to protect jobs. The share of respondents in Kosovo* who believe their government is doing so is at a record 5%. This economy also has the biggest proportion of neutral respondents (41%).

CONFIDENCE IN SOURCES OF INFORMATION

As expected, medical professionals are seen as the most credible sources of information on coronavirus by clear majorities in all economies. Moreover, over two-thirds express concern over falling victims of pandemic-related disinformation.

Medical professionals are the most credible sources of information on coronavirus across the region. Six in ten have the highest level of trust in them, while 34% find friends, family members and colleagues as the most trustworthy, and 32% find TV stations as such. Government officials and internet are equally credible (17%), while 12% do not trust any of these sources. Radio stations and newspapers are the least trusted ones, possibly because they are naturally less dynamic and accessible as information providers.

Medical professionals enjoy the highest level of trust in Kosovo* (by 77%) and the lowest in Bosnia and Herzegovina (by 48%). They enjoy the trust of well over half of respondents in other economies. In other highlights, TV stations (49%), and friends, family members and colleagues (34%) are quite trusted in Albania. Government officials in Albania are trusted by 30% of participants (the highest in the region), while they enjoy the lowest level of confidence in Bosnia and Herzegovina (7%). The Republic of North Macedonia has the highest share of those who do not trust any of these sources of information (19%), making it the most susceptible to disinformation over the pandemic.

Figure 140: Which of the following sources of information do you have the most confidence in with regards to the accuracy of information they provide on the coronavirus?

(All respondents, N=6000, scale from 1 to 8, share of total, %)

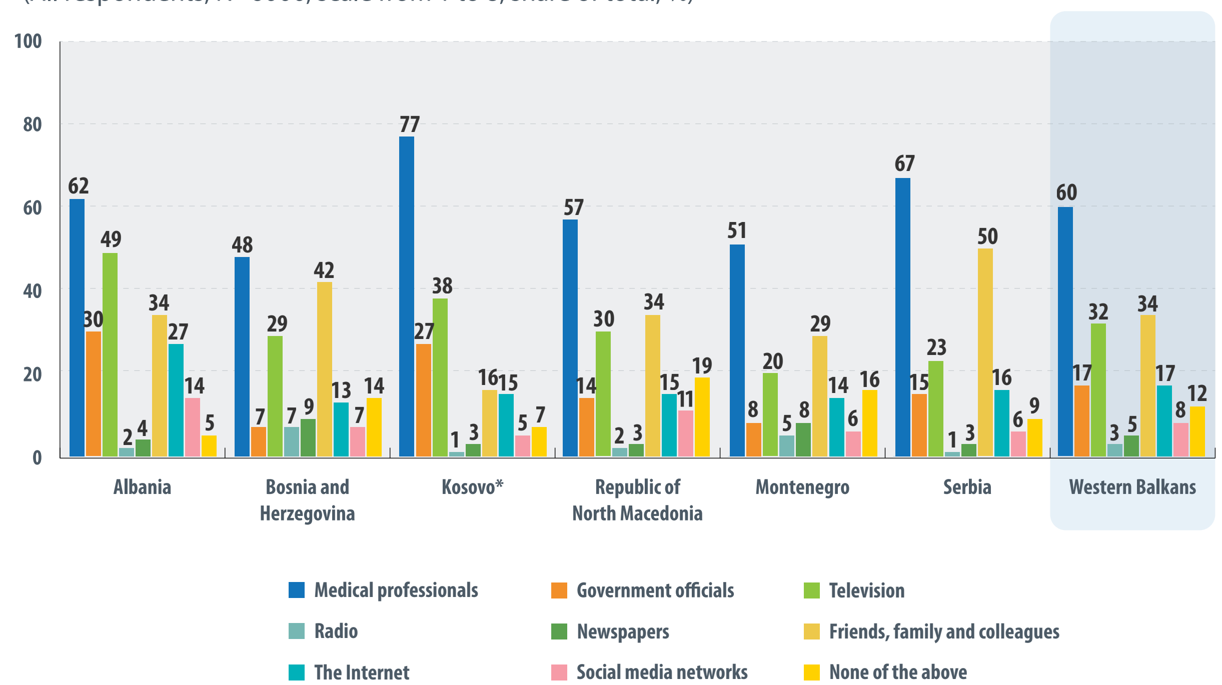
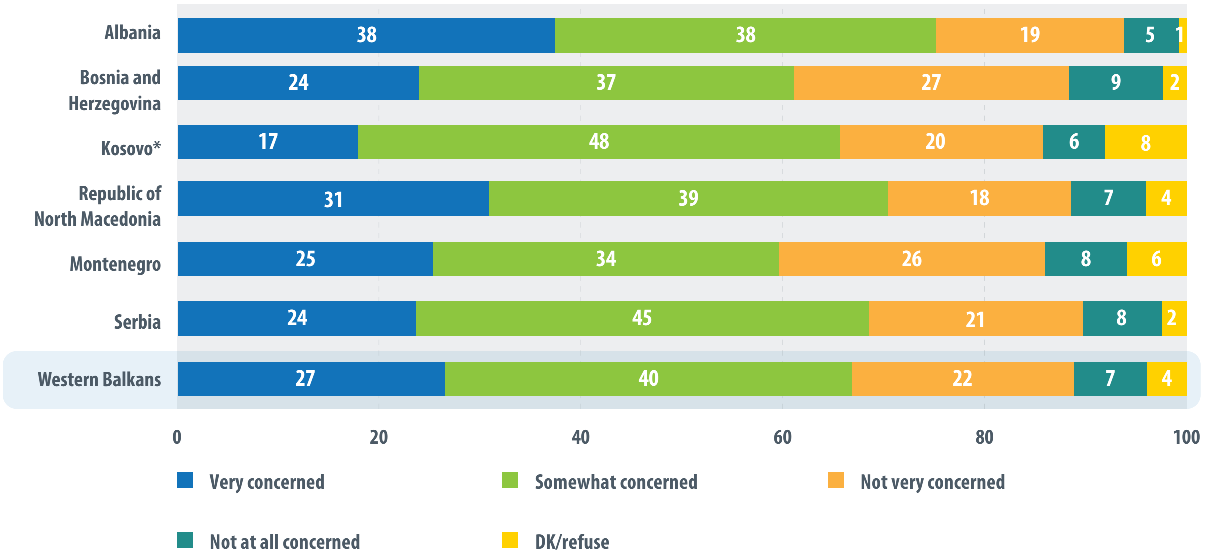


Figure 141: How concerned are you with the circulation of disinformation in the context of COVID-19?

(All respondents, N=6000, scale from 1 to 5, share of total, %)



Though quite a number of respondents do not trust any of the eight information sources when it comes to the coronavirus, awareness of the risk of falling victims of disinformation is overall high (67%). This concern is the highest in Albania (at 76%) and the lowest in Montenegro (at 59%).

OUTLOOK / FUTURE ACTIONS AND EXPECTATIONS

Reflecting on potential pandemic risks in the future and related threats and mitigation measures, views are mixed. Two-thirds do not believe governments' fiscal and economic measures have a positive impact, and almost four in ten respondents find anti-pandemic measures detrimental to their economies. Given the economic impact of the pandemic, it is no surprise that economic recovery is a priority – over social progress, health and wellbeing and environmental protection – for well over half of populations.

Six in ten find restrictions of civil liberties imposed by governments in their efforts to curb the pandemic justified. In addition, more people trust their governments to make the right decisions in the future than not. On the role of external actors in anti-pandemic efforts, the EU is seen as the most supportive, followed by China, Turkey and Russia.

Future virus protection actions rank from the most to the least favourite, as follows: washing hands (43%),

Figure 142: Which of the following actions, if any, would you consider taking in the future to protect yourself from another virus?

(All respondents, N=6000, scale from 1 to 8, share of total, %)

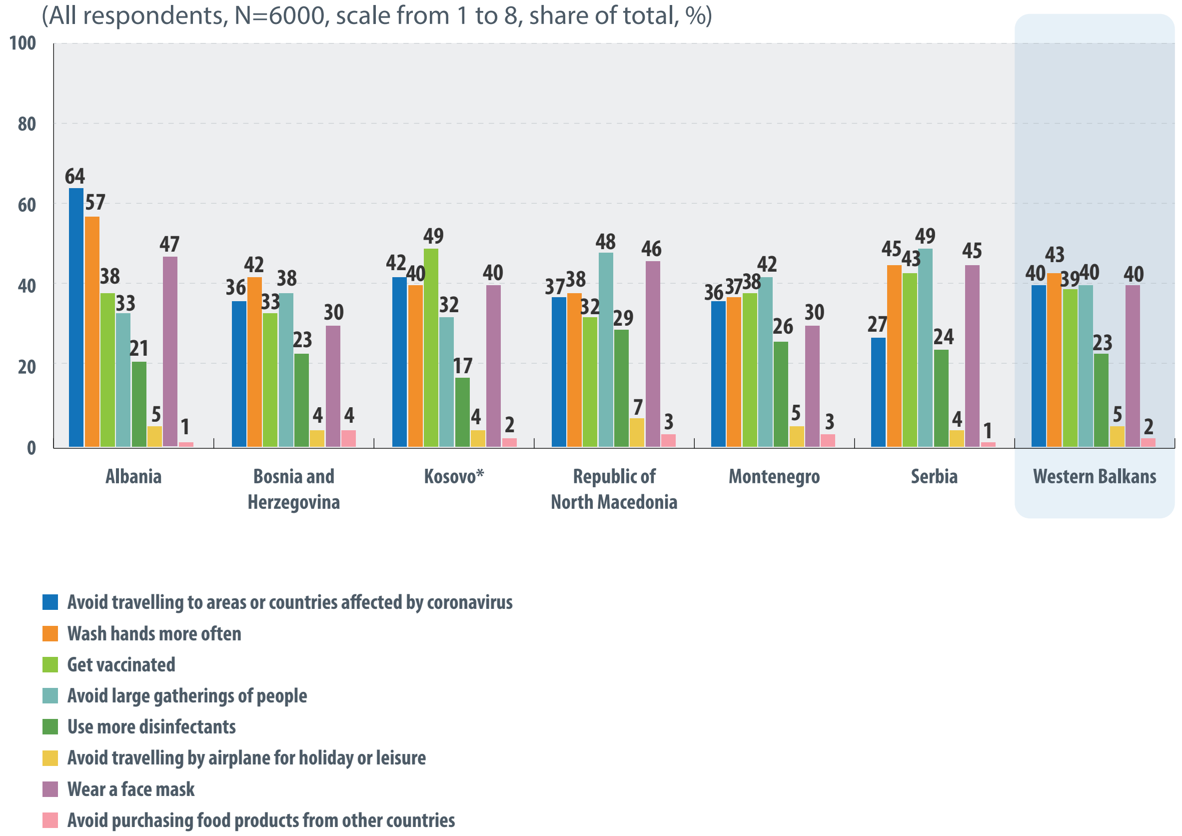


Figure 143: To what extent, if at all, do you agree or disagree, with the following statement: the Government's economic and fiscal measures will have positive impact on the economy?

(All respondents, N=6000, scale from 1 to 8, share of total, %)

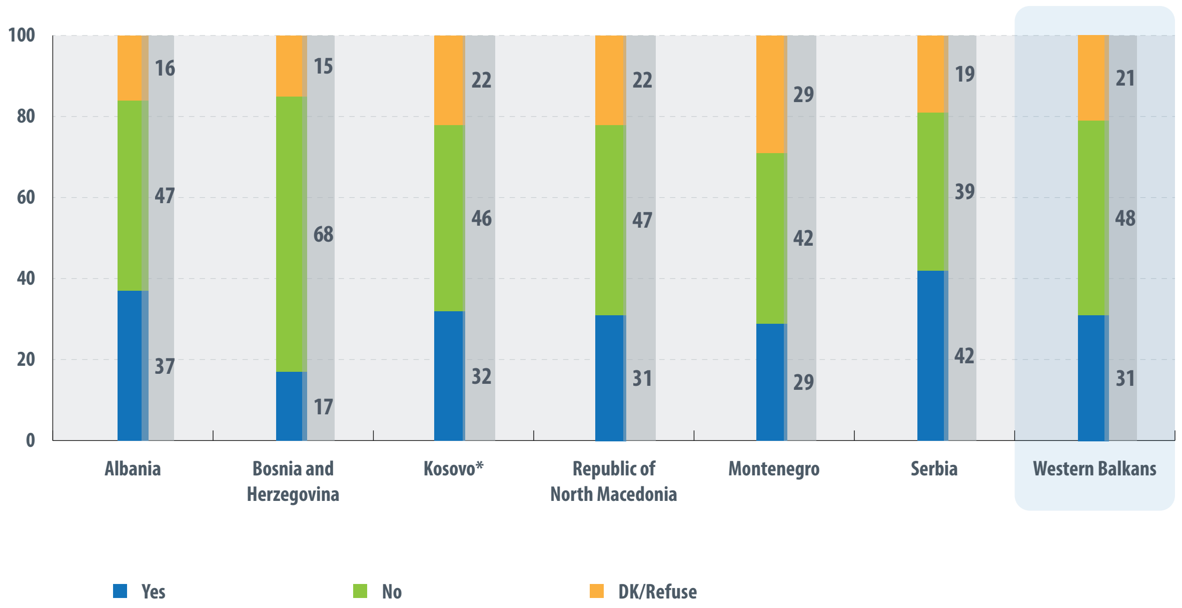
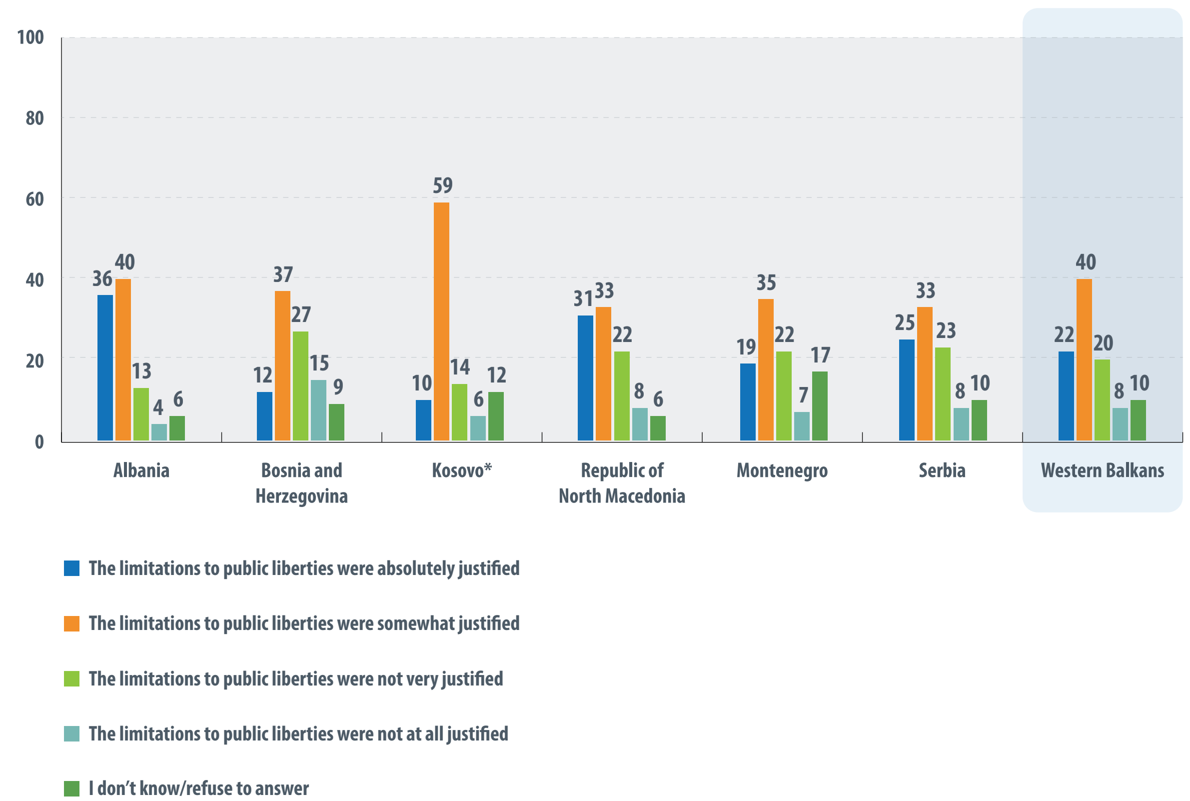


Figure 144: When considering the measures taken by the public authorities in 'ECONOMY' to fight the coronavirus and its effects, would you say that:

(All respondents, N=6000, scale from 1 to 5, share of total, %)



avoiding traveling to contaminated areas, avoiding large gatherings and wearing face masks (40% in all), getting vaccinated (39%), using disinfectants more often (23%) and avoiding air travel (5%). In individual economies, 64% in Albania would avoid traveling to contaminated areas, and 57% would wash hands more often. Avoiding traveling is preferred by 27% in Serbia, which is the lowest share in the region. Nearly half in Kosovo* and Serbia, and three to four in ten elsewhere, favour vaccination.Overall, scepticism over positive impact of governments' fiscal and economic measures is shared by 40% of respondents, while pessimism and optimism are shared by 27% and 26%, respectively.

The highest level of scepticism is shared in Kosovo* (54%) and the lowest in Serbia (33%). With 46% agreeing that their government's fiscal and economic measures will have a positive impact, the latter is the economy where optimists outnumber both sceptics and pessimists. Compared to other economies, Bosnia and Herzegovina has the highest share of pessimists (40%) and the lowest percentage of optimists (12%).

Overall, limitations on civil liberties imposed by governments in their efforts to curb the pandemic are justified by 62%. Albania and Kosovo* have the highest share of 'consenting' respondents to limitations (76% and 69%, respectively), while Bosnia and Herzegovina has the lowest (49%). Conversely, Bosnia and Herzegovina and Albania are found on opposite ends of the scale when it comes to the share of respondents who do not justify such restrictions: 42% in the former and 17% in the latter. Montenegro has the highest number of indifferent respondents on this issue (17%).

Overall, over one-third of participants (38%) in the region think that pandemic –induced restrictions harm the economies. This share is the highest in Albania (56%) and the lowest in Serbia (24%). On the other hand, Kosovo* has the lowest share of respondents who think that such measures are economy-driven and detrimental to health (5% of them), as opposed to Montenegro and the Republic of North Macedonia (both at 21%). The former has the highest share of indifferent respondents on this issue, as well (22%).

Figure 145: When considering the measures taken by the public authorities in 'ECONOMY' to fight the coronavirus and its effects, would you say that:

(All respondents, N=6000, scale from 1 to 5, share of total, %)

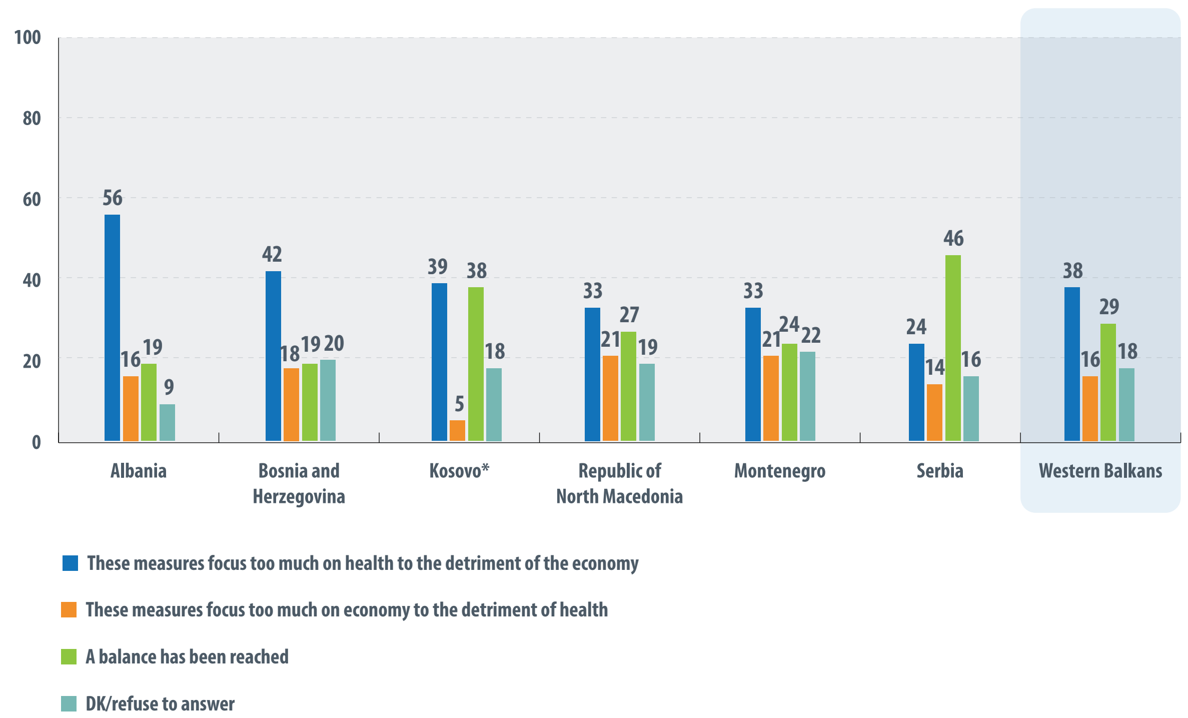


Figure 146: In your opinion, during the pandemic, who supported 'ECONOMY' the most in terms of making medical, financial or other donations?

(All respondents, N=6000, scale from 1 to 8, share of total, %)

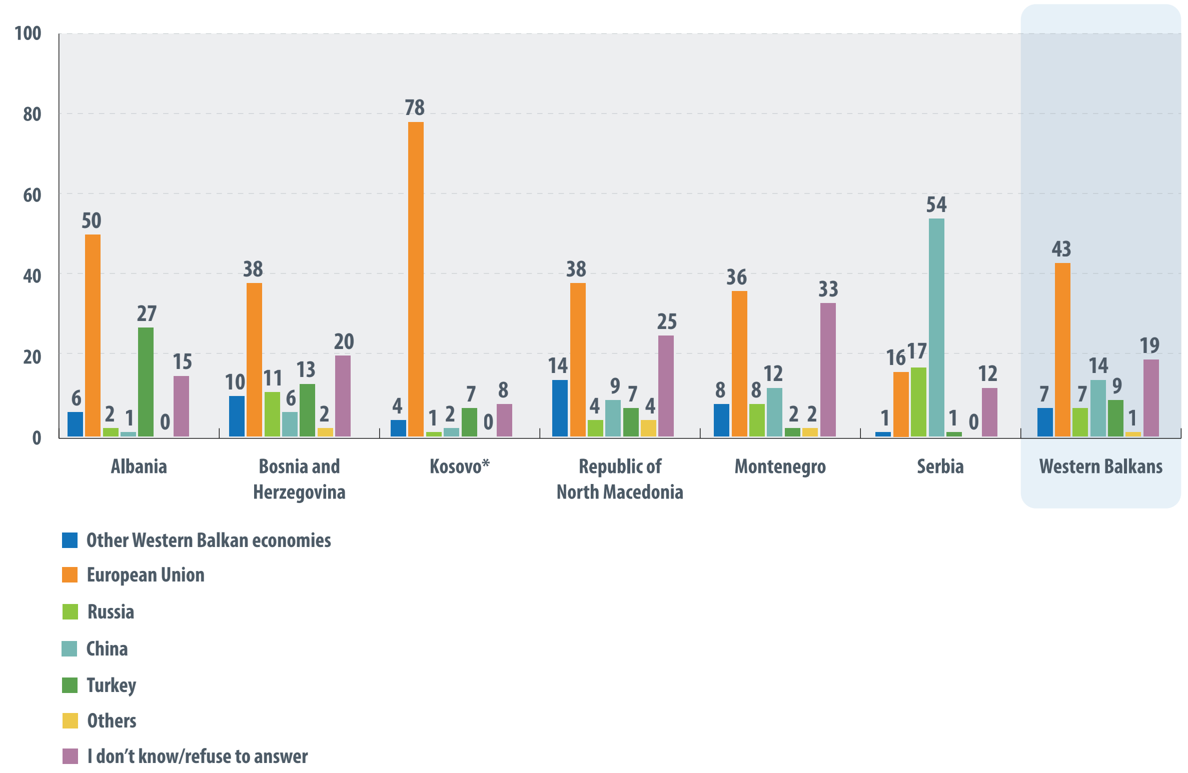
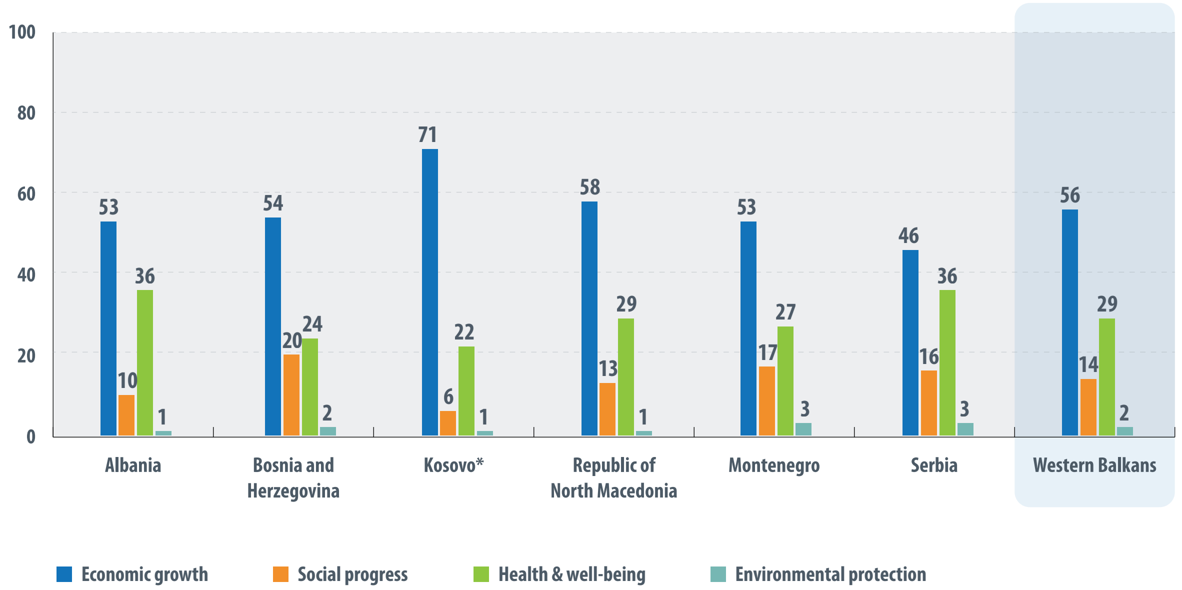


Figure 147: Imagining the COVID-19 pandemic is over, what should your economy prioritise more?

(All respondents, N=6000, scale from 1 to 8, share of total, %)



Overall, the EU is perceived as the most supportive in anti-pandemic efforts, through medical and financial means (by 43% of respondents), followed by China (with 14%), Turkey (with 9%) and Russia and other economies of the Western Balkans (both groups at 7%).

Kosovo* leads, by a wide margin, in the number of those who find the EU to be the most supportive (78%), as opposed to Serbia (16%). Serbia leads by a wide margin in the share of those who see the most support coming from China (54%) and Russia (17%). Over a quarter in Albania find Turkey to be the most supportive.

Overall, economic recovery is seen as the main priority by a wide margin of 56% of respondents, followed by health and wellbeing (29%), social progress (14%) and environmental protection (2%). Economic recovery is the top priority for 71% of respondents in Kosovo* and 46% in Serbia. Health and wellbeing top the list in Albania and Serbia (36% in both). Social progress is a top priority for a fifth of respondents in Bosnia and Herzegovina (20%), in contrast to only 6% of those in Kosovo*.

Figure 148: Thinking about your economy's response to coronavirus outbreak, to what

(All respondents, N=6000, scale from 1 to 8, share of total, %)

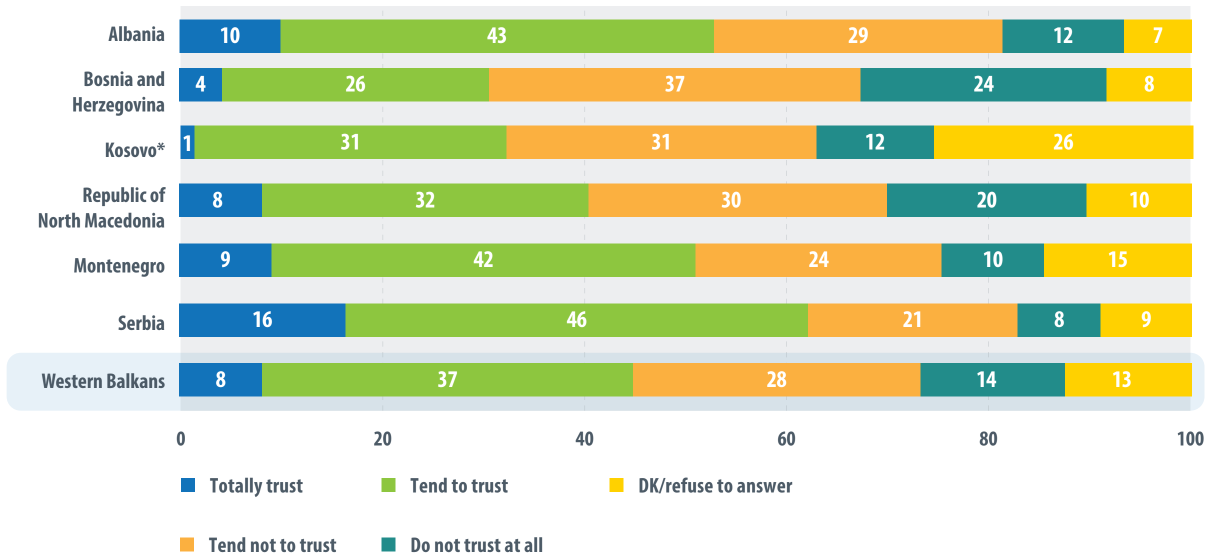


Figure 149: Are you willing to take a vaccine for COVID-19?

(All respondents, N=6000, scale from 1 to 8, share of total, %)

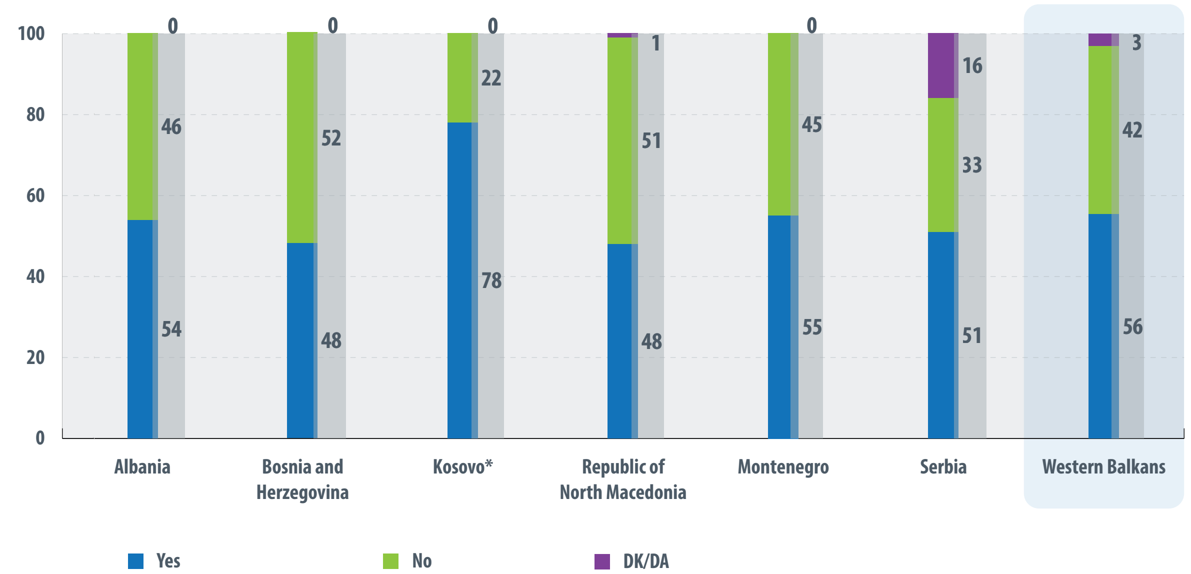
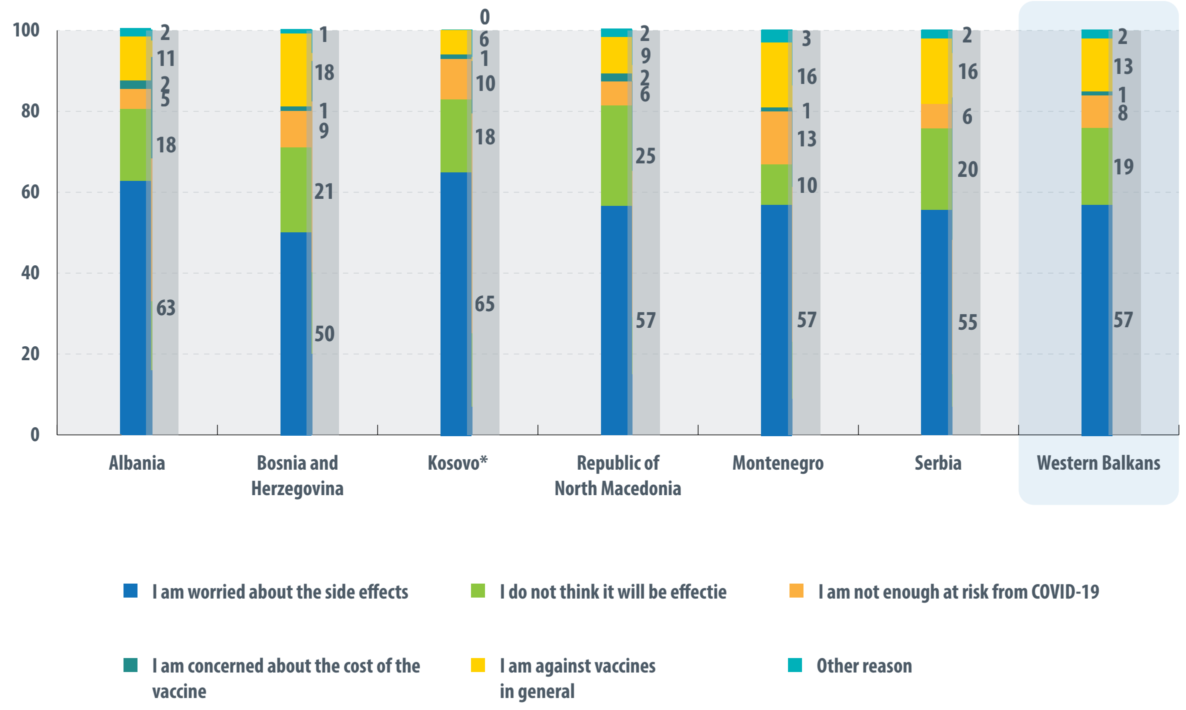


Figure 150: Which best describes why would you not take the vaccine for COVID-19?

(Those who are not willing to take a vaccine, N=2489, scale from 1 to 8, share of total, %)



Overall, economic recovery is seen as the main priority by a wide margin of 56% of respondents, followed by health and wellbeing (29%), social progress (14%) and environmental protection (2%). Economic recovery is the top priority for 71% of respondents in Kosovo* and 46% in Serbia. Health and wellbeing top the list in Albania and Serbia (36% in both). Social progress is a top priority for a fifth of respondent in Bosnia and Herzegovina (20%), in contrast to only 6% of those in Kosovo*.

Coming back to the level of trust in governments, this time in the context of their response to COVID-19, future prospects are more optimistic in all economies compared to other situations and policy areas presented elsewhere in this round. Overall, 45% of respondents trust their governments making the right decisions in the future, while 13% do not have an opinion or refused to engage with this question. Serbia has the highest share of respondents (62%) who trust their governments on this, in contrast to Bosnia and Herzegovina (where 61% distrust theirs). Over one-fourth in Kosovo* (26%) do not have an opinion or refused to share one.

Overall, 56% of the survey population are willing to undergo anti-COVID-19 immunisation, as opposed to 42% not willing to do so. This share of the latter category of respondents is the highest in Bosnia and Herzegovina (52%) and the lowest in Kosovo* (22%). Conversely, the latter is the economy with the highest share of those willing to receive the vaccine (78%) and the former with the lowest (48%). Serbia has the highest share of those who do not have an opinion or refused to answer – 16%.

Overall, of those refusing to undergo immunisation against COVID-19, 57% fear side effects, 19% find it ineffective and 8% do not find themselves exposed to infection. The fraction of respondents who claim to be 'against vaccines in general' is quite high (13%). In individual economies, 65% of those refusing to inoculate in Kosovo* are worried about side effects, while this number stands at 50% in Bosnia and Herzegovina, and 18% of respondents are against vaccines. One in four in the Republic of North Macedonia finds the vaccine ineffective.

CONCLUSIONS AND RECOMMENDATIONS AND EXPECTATIONS

Trends of stagnation in key indicators of government performance show the need for sustainable reforms in public institutions and rule of law systems in all Western Balkan economies. Trust in public institutions remains low: level of distrust in courts, parliaments and governments ranges between half of respondents and six in ten. Even worse, nearly seven in ten believe that laws are not applied equally, and over two-thirds think that institutions, primarily judicial ones, are not independent from political influence.

Moreover, corruption is considered as a significant issue for one-fourth of citizens in the region. Critical power holders such as political parties and parliaments, and vital public services such as healthcare remain perceived as the most corrupt by over three-quarters of citizens. Six in ten citizens think that corruption in their economies is not being fought successfully, and about four in ten are totally disinterested in government decision-making. However, there is an increasing awareness of the role of public administration in enhancing youth engagement on local and economy levels, with 92% agreeing that public administration should strengthen its mechanisms to involve youth in decision making processes. This should be seen as an urgent call for respective governments to take action to provide more job opportunities and promote meritocracy, transparency and accountability.

Thus, given the domestic pressure to reform, as well as the increasingly less predictable political environment inside the region and in terms of its EU prospects, reforms need to be rather domestically driven. Last but not least, the COVID-19 pandemic crisis shows the need for resilience and adaptability in civic activism and public governance in the face of political and economic crises.

As it has become customary, unemployment and economic development remain two key problems in the region, with half of the population being preoccupied over this issue. Unemployment is significantly higher among young people, due to lack of job opportunities as well as a mismatch between education and labour market. Roughly one-third of graduates were able to secure employment in less than a year of finishing their education, while some two-thirds found a job within three years. Compared to last year, these numbers paint a slightly more optimistic picture of the labour market with youth unemployment being contracted among the Western Balkans. However, youth unemployment in the Western Balkans is among the highest in the world, therefore boosting job creation and labour demand for the youth is an action required of respective governments. Bridging the gap between a dynamic labour market and skills acquired in the education system is increasingly seen as an important tool to combat youth unemployment and promote sustainability in the labour market.

As digitalisation is constantly shaping the economy, digital competences are increasingly seen as key capacities to remain relevant in ever-changing labour markets. As expected, digital skills were the most required area for improvement, with 39% of the region's employers stating to have been instructed to advance these skills. In addition, there is a growing public awareness of communication skills in native language as the second most required competence for professional development.

Other challenges and pressing needs such as climate change and infrastructure for economic development are equally complex. A growing awareness and concern over effects of climate change and pollution in all economies, shared by majorities of two-thirds to 80% of respondents, represents an urgent call for all actors to take action. Especially considering the fact that half of them do not believe that the region will achieve climate neutrality by 2050. On the other hand, significant levels of dissatisfaction with the quality of infrastructure and connections persist (at 26% to 38%) and investments in roads as the most used mode of transport are seen as the most beneficial by about six in ten citizens on average.

This shows that much more needs to be done to catch up with the level of infrastructural development in the EU, as a precondition for catching up with overall development. Such challenges are highly complex policy-wise, given that environment and infrastructure are increasingly broadening and converging with other areas such as energy, digitalisation and social infrastructure. The Green Agenda and the Economic and Investment Plan for the Western Balkans should be seen as key pillars on the way ahead in these areas.which is the lowest share in the region. Nearly half in Kosovo* and Serbia, and three to four in ten elsewhere, favour vaccination.

NOTE ON METHODOLOGY

Methodology used for Public Opinion Survey was quantitative research and data collection method – CAPI (Computer-Assisted Personal Interviewing). The survey was conducted via personal household interviews carried out by trained interviewers from Data Centrum Research Institute, between December 2020 and February 2021 in Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, the Republic of North Macedonia, and due to the COVID Measures in Serbia, the used methodology is CATI (Computer-Assisted Telephone Interviewing)

Questionnaire

The survey questionnaire was provided by the RCC. The Public Opinion Survey questionnaire was composed of the total of 117 questions, including the extra section and the demographics (region, size of settlement, gender, age, education, nationality, marital status, household income and self-assessed social status of the respondent).

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

RCC reviewed and approved all the translations of the questionnaires.

Since the CAPI methodology was used in the research, all questionnaires were converted to a digital form and installed on interviewers' tablets.

The programmed questionnaires were reviewed by a responsible person in each economy.

Interviewers

The survey was conducted by experienced interviewers in all economies. All the interviewers were trained and given instructions containing general description of the questionnaire, of the method of selecting addresses for the interviews and of the respondent selection method, and were trained to understand research goals, interviewing method and eligible respondent selection.

Sample

Public Opinion Survey was conducted among N=1000 respondents in each economy, aged 18+ with the total of 6,000 respondents from the entire Western Balkans region.

For the Public Opinion Survey, the target respondents were:

- 18+ years old who reside in private households,
- Resident in the territory of the economies included in the survey,

Stratification/selection procedure:

To achieve a fully representative sample of the targeted population, a Multistage stratified cluster was applied, using the data of the last official census in each economy, starting from the administrative area/region, and the selection of the cities/villages. In each city or village, a number of starting points will be pre-selected based on the population of the area. Selection of households was done by using the random route method; from each starting point, the interviewer will start to select the households that will participate in the research, by 'knocking' the door of every third household. The respondent selection was done using the birthday method – the family member who has the nearest coming birthday; The number of respondents was calculated proportionally based on the number of inhabitants in each size of settlements in the region/county, while the number of sampling points was defined based on the obtained number of respondents (for each region/county and in each size of settlement). The maximum number of respondents per one sampling point was 5-10 on average. Table 3: Sample structure by region

SAMPLE STRUCTURE

Table 3: Sample structure by region

Economy	Region	%
Albania	Berat	5
	Dibër	4.5
	Durrës	9
	Elbasan	10.5
	Fier	11
	Gjirokastër	3
	Korçë	8
	Kukës	3
	Lezhë	4.5
	Shkodër	7.5
	Tiranë	28
	Vlorë	6
Bosnia and Herzegovina	Federacija BiH	62.1
	Republika Srpska	35.5
	Brčko District	2.4
Kosovo*	Prishtinë	27.6
	Mitrovicë	11.2
	Pejë	13.1
	Prizren	22.5
	Ferizaj	9.8
	Gjilan	10.2
	Gjakovë	5.6
Republic of North Macedonia	Vardar	7.6
	East	9.1
	Southwest	8.3
	Sourtheast	11.3
	Pealgonia	16.1
	Polog	10.4
	Northeast	8.5
	Skopje	28.7
Montenegro	Central region	45.8
	North region	24.3
	South region	29.9
Serbia	Belgrade	23.7
	South and East Serbia	22.1
	Central and West Serbia	28.2
	Vojvodina	26

Table 4: Sample structure by size of settlement

Economy	Region	%
Albania	Up to 2,000	15.9
	2,001 – 10,000	20.6
	10,001 – 50,000	11.8
	50,001 – 100,000	12.2
	Over 100,001	39.5
Bosnia and Herzegovina	Up to 2,000	54
	2,001 – 10,000	7.3
	10,001 – 50,000	6.9
	50,001 – 100,000	13.1
Kosovo*	Up to 2,000	57.5
	2,001 – 10,000	25.5
	10,001 – 50,000	12.1
	50,001 – 100,000	2.2
	Over 100,001	2.7
Republic of North Macedonia	Up to 2,000	7
	2,001 – 10,000	15
	10,001 – 50,000	13.8
	50,001 – 100,000	16.5
	Over 100,001	47.7
Montenegro	up to 5.000	12.6
	from 5.001 to 10.000	5.2
	from 10.001 to 20.000	15.4
	from 20.001 to 50.000	32.5
	from 50.001 to 100.000	6.9
	from 100.001 to 150.000	1.4
	from 150.001 to 250.000	19.8
	over 250.000	6.2
Serbia	up to 2.000	18
	from 2.001 to 5.000	8.2
	from 5.001 to 10.000	7
	from 10.001 to 50.000	19.8
	from 50.001 to 100.000	5.8
	over 100.000	41.2

Figure 151: Sample structure by gender

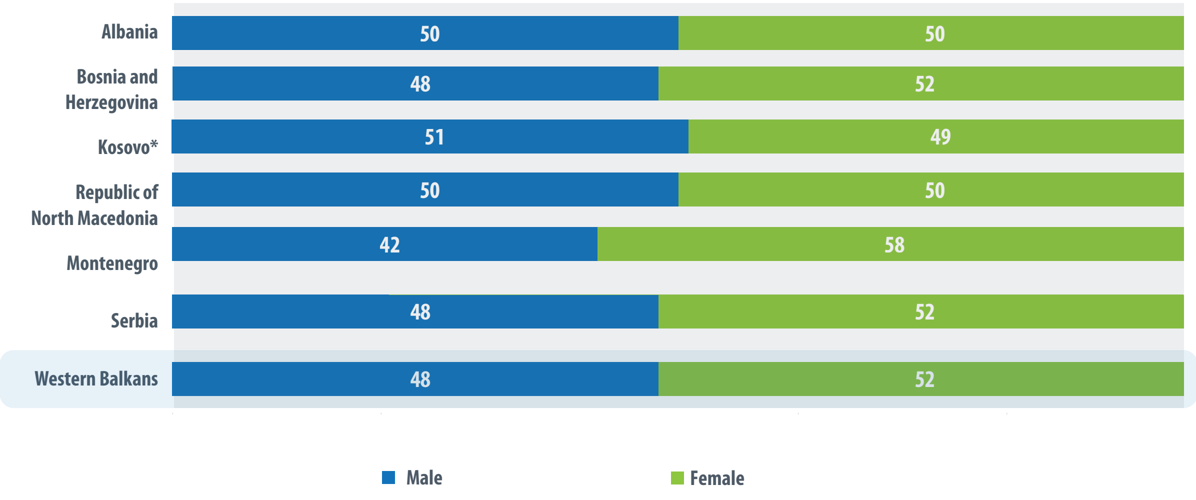


Figure 152: Sample structure by age

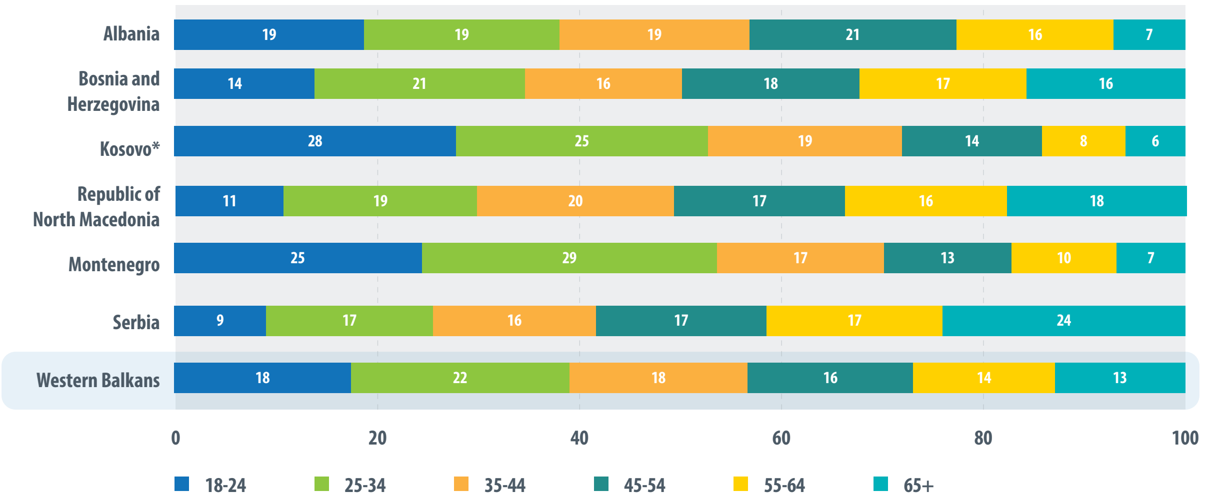


Figure 153: Sample structure by education

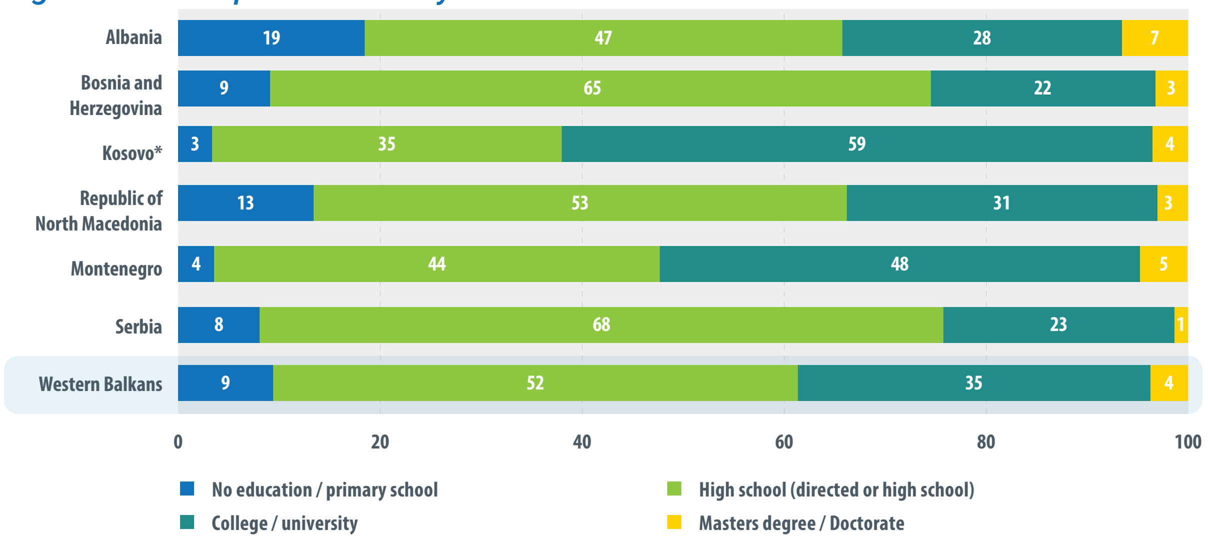


Figure 154: Sample structure by marital status

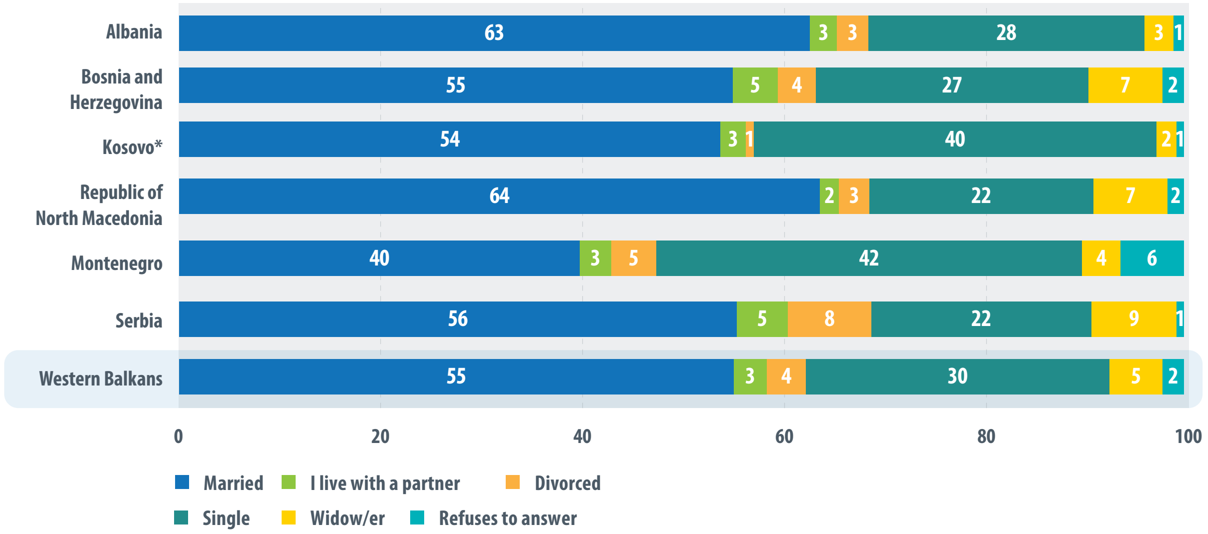
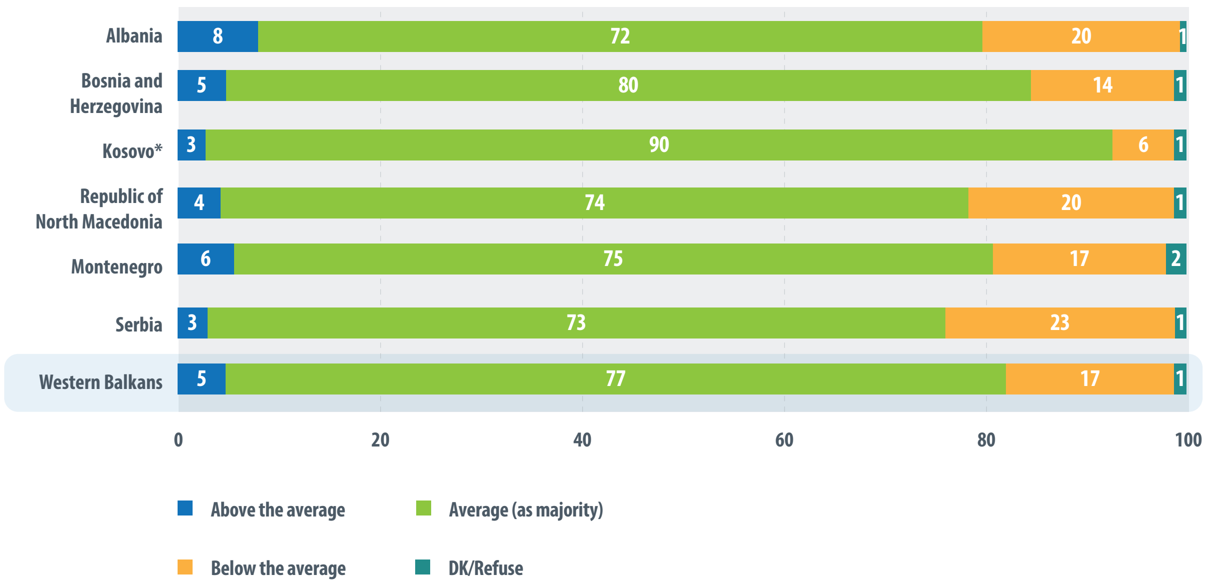


Figure 155: Sample structure by social status (self-estimation)



Methodological notes
Public Opinion Survey

DATACENTRUM

Method	Public Opinion Survey implemented in the form Face to Face Interviews, in the respondents household!
LOI	Very high duration of Interview (50 - 65 minutes), that caused: a. High level of termination mid-interview. c. High refusal rate (50% up to 60%) *The length of the interview was higher than the expectations and vs. the details shared on the bidding process.*
Extra Section	COVID-19 section made the survey became more complex and voluminous; Suggestion for other waves: COVID-19 or any other extra sections to be conducted as a different survey and methodology (i.e CATI)
Other issues and COVID-19	The winter weather and the total/partial lockdown in a few economies caused a few problems of transportation, by slowing down the fieldwork data collection! COVID-19 fear and precautions, was one of the reasons of refusals! The fieldwork was conducted with partial number of employees, due to cases with the virus amongst the staff!
Data Analyses	Longer data analysis time due to the variability of answers, and extra section!

RegionalCooperationCouncil

Regional Cooperation Council Secretariat
Trg Bosne I Hercegovine 1/V
71000 Sarajevo, Bosnia and Herzegovina
T: + 387 33 561 700
www.rcc.int/balkanbarometer

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