PUBLIC OPINION SURVEY

Balkan Barometer 2017

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Good. Better. Regional.

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SEE 2020 SERIES

Balkan Barometer 2017

Public Opinion Survey

Analytical report

Group of authors - GfK

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Foreword

In 2014, the Regional Cooperation Council (RCC) first commissioned a comprehensive perception survey, the Balkan Barometer, targeting the region's population and its business community. The primary purpose of the survey was to assess the perceptions of regional trends and processes as part of the monitoring and reporting mechanism for the SEE 2020 Strategy, an ambitious blueprint for the region in years to come.

It is with a sense of great pride and pleasure that I give you the Barometer's 2017 edition, the most recent examination of attitudes, experiences, aspirations, perceptions and expectations across the seven economies of the SEE 2020 process.

While the Balkan Barometer remains an instrumental element of the SEE 2020 monitoring process, the usefulness and timeliness of its data, now set against a wealth of baseline data, provides ample openings for analytics that transcend the confines of the 2020 Strategy. The ability to observe the evolution of socio-economic trends across a number of years represents an unprecedented opportunity to develop fact-based policy and observe its effects on the region and its individual economies. The value of data generated through the Barometer is not restricted to policy elites alone, however – civil society actors, the media, as well as the general public now benefit from reliable statistics on regional trends and perceptions.

This year's Barometer brings mixed news; while there is further evidence of economic recovery across a number of the region's larger economies, unemployment remains the chief concern. Worryingly, the Barometer highlights ever growing anxiety over corruption; in 2015, 15% rated corruption as one of the key problems for the region. The number was up to 27% in 2016 and is now at 32%.

Likewise, the perception of traditional democratic institutions, for reasons both complex and manifold, leaves much to be desired in terms of both performance and public confidence. Furthermore, despite notional support for European integration there continues to be widespread skepticism about the region's short to medium term accession prospects. At the same time, an upturn in economic performance by the region's economies has brought about an increasingly optimistic outlook for the future that needs to be solidified through decisive government action.

Businesspeople continue to struggle with what they see as complex taxation and an unfriendly business environment with an unpredictable legal system. As in previous years, both groups of respondents express markedly more confidence in themselves or their businesses, than in their economies.

Goran Svilanovic, PhD
Secretary General
Regional Cooperation Council

While it's hardly news that the region has much work to do, our hope is that the Barometer's findings will help set the agenda that will ultimately spur further growth in the region. As in 2016, this year's edition of the Balkan Barometer includes an addition to the seven regional economies – this year it's the survey of the public and the business community of Turkey – with the idea to enhance understanding of the similarities and differences between Turkey and the SEE 2020 economies, with the explicit aim of bringing these markets closer together.

The preparation of this publication has involved the dedication, skill and efforts of many individuals, whom I would like to thank. I hope that you will enjoy reading the report and will benefit from its findings.

Introduction

The 2017 Balkan Barometer represents yet another installment in the series of annual public opinion surveys commissioned by the Regional Cooperation Council to collect and analyse data across a host of thematic areas, examining aspirations and expectations of the region's populations and its business community on life and work, prevalent socio-economic and political trends as well as regional and European integration, among others.

With its baseline expanding with every new edition, the Barometer is now a critical part of the monitoring framework for the SEE 2020 Strategy, an ambitious regional agenda adopted in 2013 by the Ministers of Economy of the seven regional economies (Albania, Bosnia and Herzegovina, Croatia[1], Kosovo*, Montenegro, Serbia and The Former Yugoslav Republic of Macedonia). Mirroring its EU counterpart, the Strategy aims to grow prosperity and promote job creation in the region while fostering co-operation along regional and European lines. Much like the EU 2020 Strategy, the document sets out a number of growth-oriented integrated development policy objectives:

- Integrated growth: through the promotion of regional trade and investment policies and linkages that are non-discriminatory, transparent and predictable.
- Smart growth: by committing to innovate and compete on value added rather than labour costs.
- Sustainable growth: by raising the level of competitiveness in the private sector, enhancing connectivity through infrastructure development and encouraging greener and more energy efficient growth.
- Inclusive growth: by placing greater emphasis on developing skills, creating employment, inclusive participation in the labour market and health and wellbeing.
- Governance for growth: by enhancing the capacity of the public administration to strengthen the rule of law and reduce corruption, the creation of a business-friendly environment and delivery of public services necessary for economic development.

The findings of the survey illustrate the need to pursue these objectives with increased

[1] Although part of the initial group of economies that developed the SEE 2020 vision, its targets and the Strategy, Croatia has since joined the EU as its most recent member and has taken over numerous responsibilities, including the monitoring of EU 2020 targets. Hence, Croatia no longer participates in the SEE 2020 monitoring process.
*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.

vigour and greater speed. Unemployment continues to dominate thinking while the perception of traditional democratic institutions, for reasons both complex and manifold, leaves much to be desired in terms of both performance and public confidence. Despite notional support for regional and European integration there continues to be widespread skepticism about the ability of regional and European arrangments to address pressing economic and political problems. At the same time, an upturn in economic performance by the region's economies has brought about an increasingly optimistic outlook for the future that needs to be solidified through decisive government policy.

The findings of the Balkan Barometer have become an important companion to statistical data collected by the RCC, the individual governments in the region as well as other partners in trying to assess the level of implementation for the SEE 2020 Strategy. Unlike traditional statistical data, the Balkan Barometer provides a direct interface for the business community and the public at large to engage directly. Thus, the perception-based indicators complement well the qualitative and quantitative indicators collected through other means.

Since its inception in 2014, the Barometer has evolved in order to remain current and relevant, with questions added and removed without adversely affecting its comparability or utility in reading and interpreting trends across the region. This edition offers new insight on important issues related to the security situation; environmental protection; accountability, independence and trust in institutions; public services delivery; corruption; Roma integration and gender equality, etc. In a welcoming collaboration established between RCC and OECD-SIGMA, the perception based insights, generated through the public administration-related questions, contribute and add value to SIGMA's public administration monitoring assessments in the Western Balkans.

As last year, the report will look at perceptions and expectations in the broader SEE region, with Turkey in focus in the current edition, in order to identify and showcase the similarities and differences within the SEE region.

Main Findings

The upwards trend in both present satisfaction and outlook remains steady, although overall numbers remain below average. Interestingly, the majority of other views and preferences remain largely unchanged from earlier issues of the Balkan Barometer. Looking at the findings of the European Barometer, the Balkans are becoming more optimistic, although the level of general satisfaction remains higher in the rest of Europe.

SATISFACTION AND EXPECTATIONS

As in the last edition of the Barometer, expectations for the future outscore satisfaction with the present. This bodes well for overall development given that the mood in the region was gloomier three or so years ago. Improvements are especially noticeable in the larger economies which have previously lagged. Optimism continues to be particularly pronounced in Kosovo*while there has been no improvement of sentiments in The Former Yugoslav Republic of Macedonia.

Overall, however, the larger economies, and Bosnia and Herzegovina in particular, continue to be less satisfied and more pessimistic than the smaller ones. Interestingly, the economic performance of the larger economies is catching up to those of their smaller neighbours; this indicates that the respoindents' pessimistic outlook is not necessarily borne out by the economic realities on the ground or, somehwat likelier, that the effects of the economic upturn have yet to be felt across the societies at large.

COOPERATION AND INTEGRATION

Repondents remain generally supportive of regional cooperation but with varying degrees of entusiasm. The views on EU accession range from largely unpopular in Serbia to overwhelmingly supportive in Kosovo* and Albania. The reasoning largely mirrors previous years and differs across the economies. Political considerations continue to diminish popular support for EU accession in Serbia, although an upturn in economic performance may usher in a more positive perception of the Union as the principal investor and a key export market. The remainder of the region considers the EU helpful in economic terms and conducive to political stability, but pessimism abounds when it comes to the prospects of membership.

EMPLOYMENT AND POVERTY

Availability of jobs continues to top the list of key concerns in the region. Opinions on practically every other issue are in one form or another linked to the respondents' experiences of the labour market. Preference for public over private sector employment clearly indicates the prioritization of job security over size of income and career prospects for most job seekers.

As in previous years, personal employment and financial prospects are appraised better than the overall situation in the economy. This is linked to the respondents' prevalent faith in their own ability versus their shared uncertainty about public policies and their impact on society. Importantly, the overall perception of public policy is that it is restrictive of, rather than conducive to, personal gains and development.

Poverty continues to be a problem, though not as pronounced as expected given the region's prolonged economic slump. People tend to save on holidays and cultural amenities rather than food and other consumer items.

MOBILITY

Emigration in pursuit of work and better quality of life continues to be desired by almost half of the population. This is more a reflection of the respondents' appraisal of the state of affairs at home rather than a decision to be acted upon. Movement within the region, outside of traditional routes, remains unpopular. This may change in the future with increased economic integration.

INCLUSION

The region remains inclusive but only declaratively. This is an area where reality very much diverges from stated opinion. Differences in ethnicity and gender are not explicitly recognized as sources of influence by the respondents but they, in fact, heavily influence employment and other economic and social prospects across the region. There is overwhelming acceptance that employment and other prospects heavily depend on who, rather than what, you know, i.e. that decisions are made outside of formal and proper channels.

TRADE

Support for cross-border trade persists with some protectionist leanings when it comes to foreign investment. Home bias is still very much a regional feature with a strong and confident belief in the competitiveness of domestic products. At the same time, openness of economies to trade and mobility remains popular. There is limited, if any, support for the types of populist and isolationist policies now taking hold in more developed economies in Europe and across the world.

TRANSPORT AND INFRASTRUCTURE

Roads continue to be the preferred mean of transport and require substantial investment across the region.

CLIMATE CHANGE AND ENERGY

Opinions in the region remain environmentally friendly with strong concerns over energy policy, as in previous years. This is, however, another subject where opinions do not necessarily translate into concrete action.

INSTITUTIONS AND CORRUPTION

There is heightened concern with corruption, a frequent companion of improved economic prospects. Corruption has significant distributional effects and those start to play more of a role in economies that are growing. Similarly, the quality of institutional performance will increase in importance with economic growth. However, as in previous surveys, governance concerns continue to play an important role in public perceptions. For instance, a lack of positive movement in terms of sentiment and expectation in The Former Yugoslav Republic of Macedonia is clearly connected with recent political turmoil.

CONCLUSION

Sentiments are improving, although they are yet to cross the midway point between good and bad. The difference between the under-performing larger economies and the smaller ones that are doing better is still there but is narrowing. Employment continues to be the biggest problem, while corruption is moving up the scale of concerns. Regional cooperation continues to be moderately popular, while enthusiasm for EU integration is yet to pick-up among the larger economies.

Regional Overview

Overall economic activity continues to improve. Recovery has picked up in economies that were previously lagging, such as Serbia. The region as a whole is set to achieve growth rates of around 3% in the medium run. This is all dependant on internal, regional and European stability all holding up. Moving to a faster growth situation will depend on a continued increase in investment and a surge in exports of goods and services.

Table 1: Gross fixed capital formation, growth rates

(% change, year on year)

	2009	2010	2011	2012	2013	2014	2015	2016	average
Albania	1.0	-8.5	5.9	-7.9	-2.0	-4.0	10.3	8.0	**0.4**
Bosnia and Herzegovina	-19.5	-11.1	6.2	2.2	-1.0	11.7	-3.5	4.5	**-1.3**
Croatia	-14.4	-15.2	-2.7	-3.3	1.4	-2.8	1.6	4.5	**-3.8**
Kosovo*	13.5	11.0	8.1	-13.6	-0.2	-3.3	12.1	1.8	**3.7**
The Former Yugoslav Republic of Macedonia	2.7	-4.0	13.3	6.5	3.5	4.0	3.6	2.0	**3.9**
Montenegro	-30.1	-18.5	-7.2	-2.4	10.7	-2.5	11.9	5.0	**-4.1**
Serbia	-22.5	-6.5	4.6	13.2	-12.0	-3.6	5.6	5.0	**-2.0**

Source: wiiw

Table 1 outlines the growth rate of investments from 2009 to 2016 with clear differences between the economies. Still, the region overall has experienced a steady growth in investment over the past couple of years, although to a lesser extent in those economies that have done better throughout the crisis (shown here by average growth rates). This applies, in particular, to the larger economies, i.e. to Serbia, Croatia, and Bosnia and Herzegovina. These three are also characterized by the most pessimistic outlook in the Balkan Barometer surveys.

Table 2: Exports of goods and services

(% share of GDP, 2015)

Exports 2016/2008	goods	services
Albania	-15	26
Bosnia and Herzegovina	79	-2.5
Croatia	39	15
Kosovo*	56	134
The Former Yugoslav Republic of Macedonia	59	69
Montenegro	-30	60
Serbia	83	64

Source: wiiw

Table 2 illustrates the dramatic change in the level and ratio of exports between goods and services in most economies across the relevant period. Some economies, like Montenegro, have specialised in the service industry, while Albania has suffered from the global decline in the price of oil coupled with an uptake in tourist activity. Overall, foreign trade has been an important driver of growth throughout the region and this is expected to continue. Exports to the EU have played more of a role than that those to the regional market, though the latter has proved important too, in particular to Serbia as a major exporter to the region's other economies.

Employment has continued to improve with unemployment rates declining. Given the extended nature of the labour market's malaise, the improvement is welcome news. Unemployment has been declining across most economies, to include those suffering from exceptionally high unemployment rates for decades, such as The Former Yugoslav Republic of Macedonia. It is likely, however, that outward migration has contributed to the decline to a greater extent than an increase in domestic employment. If indeed economic recovery speeds up, further improvements in the labour markets should be expected. This will also change the overall perception of the future for the region.

Industrial production has been improving in most economies. In the Balkan Barometer surveys, respondents tend to favour policies which support growth of industrial production. With export growth, industrial production has also started to recover throughout the region; except in Montenegro, which is one economy that continues to specialise strongly in services, for the most part in tourism.

Table 3: Growth of industrial production

(% change, year on year)

	2009	2010	2011	2012	2013	2014	2015	2016	average
Albania	4.2	36.2	19.0	15.7	28.3	1.6	-5.0	-7.0	**11.6**
Bosnia and Herzegovina	-6.5	4.3	2.4	-3.9	5.2	0.2	3.1	4.0	**1.1**
Croatia	-9.3	-1.4	-1.2	-5.6	-1.8	1.2	2.7	5.4	**-1.3**
Kosovo*	11.5	1.8	-5.7	14.9	6.5	-1.3	5.0	3.5	**4.5**
The Former Yugoslav Republic of Macedonia	-8.7	-4.9	6.9	-2.7	3.2	4.8	4.9	3.4	**0.9**
Montenegro	-32.2	17.5	-10.2	-7.1	10.6	-11.4	7.9	-4.4	**-3.7**
Serbia	-12.6	1.2	2.5	-2.2	5.5	-6.5	8.3	4.7	**0.1**

Source: wiiw

Although industrial production contributes relatively little compared to expectations for the economies surveyed, its recovery is nevertheless important. While not quite impressive, the pace and nature of recovery over the past several years suggests that the structure of economic activities is changing. This is especially true for larger economies, which have tended to underperform in the past.

Overall prospects for economic development improve. The economies in the region went into the crisis with a significant macroeconomic imbalance, in particular on external accounts, but also in terms of high levels of consumption compared to savings and public sector balances. This was exacerbated by the dismal state of their labour markets.
The imbalances have been partly corrected through faster growth of exports than imports, slower growth of consumption, and fiscal reforms in a number of cases. In addition, labour markets have made marked improvements.

Beyond macro stabilisation, there have been some structural reforms which have improved overall institutional and legal efficiency. Finally, trade regimes, both toward the EU and within the region, have been liberalised, thus supporting the growth of exports, proving essential in economic recovery. Further comprehensive institutional adjustments will be needed, in particular in the areas of rule of law and public sector reform.

Most importantly, policies that are more responsive to low employment and high unemployment levels will be needed. Overall, employment and social development have played much less of a role in public policy than security and legitimacy. A decisive change in priorities from the latter to the former is key to sustainable development in the region.

Political stability remains illusive. In previous Balkan Barometers, instability and political turmoil have been singled out as some of the most significant barriers to growth. The year 2016 has seen some of the political issues resolved, such as in Croatia and Montenegro, while some disputes continue to linger unaddressed. In general, however, democratic dialogue have been preferred over alternative resolution methods, which is probably one of the reasons that political instability has not been as economically costly as it might have been, especially having in mind the recent past. Still, political stabilisation cannot be taken for granted.

Regional stability is being tested. The region lives with a number of outstanding problems which tend to flare up from time to time putting regional stability to test. Political challenges have been recorded across the region, some long-standing and others cropping up relatively recently. So far, regional, European, and international communication and cooperation mecahnisms have been successful in easing tensions, though not necessarily in solving long-standing problems. These are reflected in the still prevailing pessimism in the region.

The regional free trade agreement and growing economic cooperation are proving helpful in supporting development and stability. The next level for cooperation will require an increase in regional investment and production. This should be enabled with regional infrastructure investments which are now supported by the EU within the so-called Berlin Process.

EU integration is a slow process, but it is not at a standstill. Though the EU is facing numerous challenges, the accession process is progressing, albeit at a slow pace. All the economies are now making progress but are at different stages in the process. This has an overall stabilising effect, but the key contribution is to trade and investment, which are needed for economic growth and development. This is perhaps not yet perceived all that clearly within the region, due to the predominant role that political problems continue to play, but this is bound to change with improved economic performance.

Balkan Public Sentiment Index

In order to monitor changes in present sentiment and outlook over time, GfK was asked to design the Balkan Public Sentiment Index (BPSI) which is composed of the following five questions:

1. How are you satisfied with the way things are going in your society? (answers: 5 point scale)
2. How are you satisfied with the financial situation of your household? (answers: 5 point scale)
3. How are you satisfied with the economic situation of your society? (answers: 5 point scale)
4. What are your expectationsfor the next year? Do you think that in 12 months your financial situation will be better, worse, the same.
5. What are your expectations for the national economy? Do you think that in 12 months the state of the economy will be better, worse, the same.

BPSI represents a measure of the current state of affairs and expectations for the future regarding the general and economic situation, as well as the situation concerning individual households taking part in the survey. It is a measure that helps to monitor changes in time at the SEE regional level as well as the level of individual economies.

The index is constructed with the answers on a five-point scales 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. Answers for Q4 and Q5 are scored as follows: better - 100 points, worse - 0 points, the same - 50 points.

After responses are recoded, the average value is calculated for the entire SEE region as well as for each economy separately. The index values are expressed on a scale of 0 to 100.

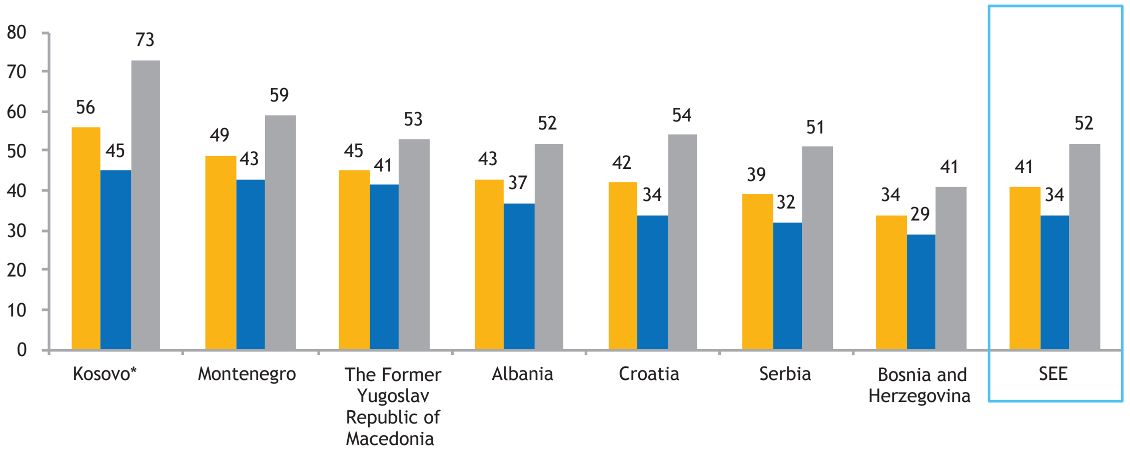
BPSI is further divided along two sub indexes, BPSI - present situation index and BPSI - expectation index, with the aim to monitor separately the present sentiment among the population as well as their expectations for the future.

- BPSI - Present Situation Index
- BPSI - Expectation Index

Below is a comparison of BPSI results for the present year with the results for the two previous cycles (2014 and 2015), both the region as a whole and for each economy separately.

Figure 1: Balkan Public Sentiment Index

(Scores are on a scale of 0 to 100)

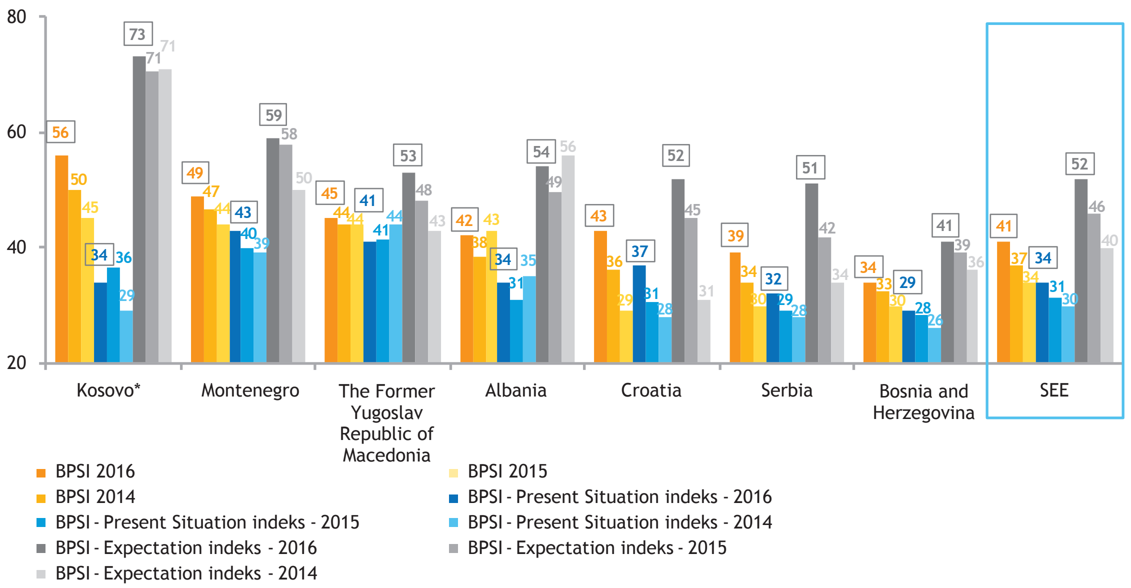


The BPSI value at the level of the SEE region is still below the average (41) with much gloom in evidence. The expectation index traditionally tends to display a higher degree of optimism for the future compared to the respondents' assessment of the current state of affairs. This is very much the case with this particular survey where the value of the expectation index is substantially higher (52) than the present situation one (34).

Looking at individual economies, there is still a trend of higher indices in younger economies such as Kosovo* (56), which were rated above the average. The lowest index values are present in Bosnia and Herzegovina (34) and Serbia (39). The high index value in Kosovo* is mostly the result of an extremely high value of the expectation index (73). This economy also records the largest discrepancy between the appraisal of the current state of affairs (45) versus expectations (73). This discrepancy is smallest in The Former Yugoslav Republic of Macedonia (41/53) and in Bosnia and Herzegovina (29/41).

Figure 2: Balkan Public Sentiment Index - comparison 2014/2015/2016

(Scores are on a scale of 0 to 100)



The figure above ilustrates the values of all three indices for the three waves of the Balkans Barometer survey (lighter shades represent the previous waves). During the last three years, satisfaction has been increasing among the population of the SEE region (34/37/41). In comparison to 2014, the BPSI has increased by 7 points. The increase, however, can mainly be attributed to a more optimistic outlook (BPSI - Expectation Index). The Expectation Index has been rising steadily over the past two survey periods, by 6 and 12 points, respectively.

Looking at the region, the BPSI index records an increase across all of its economies compared to 2015. The largest single increase in value was observed in Kosovo* (6 points). At the other end of the spectrum, The Former Yugoslav Republic of Macedonia and Bosnia and Herzegovina recorded a minimum growth in BPSI of just one point. Bosnia and Herzegovina also shows the smallest increase both in terms of the assessment of the current state of affairs and expectations for the future.

In The Former Yugoslav Republic of Macedonia, the deterioration of the economic situation was triggered by political instability, affecting both public sentiment and expectations. Should the situation be resolved before the next survey period an improvement in results is likely. In Bosnia and Herzegovina, the protracted nature of underlying political problems directly contributes to a gloomy appraisal regardless of an improving economic outlook.

Only one economy in the region, The Former Yugoslav Republic of Macedonia, recorded no change in the assessment of the current state of affairs. The slight increase in the total BPSI score was thus brough about solely by heightened expectations for the future. This reflects some optimism about the economy's ability to exit the current political crisis in the near future.

A more optimistic outlook for next year impacted BPSI growth the most across the region. The largest increase in the BPSI Expectation Index was recorded in Serbia, where it rose by 9 points, whereas the smallest was in Kosovo* where it was already very high (71/73) and in Montenegro (58/59).

The scores are reflective of the coming together of economic trends and political developments, both positive and negative. In Serbia, both political and economic developments were conducive to growth whereas in Montenegro, for example, political turmoil impacted economic trends negatively, the same as in The Former Yugoslav Republic of Macedonia. The latter expressed more optimism in the economy's ability to swiftly negotiate the political crisis while Montenegro was markedly less optimistic in its outlook; both economies, however, project favourable growth patterns.

Kosovo* remains the only economy where an increase in the overall BPSI index was mainly brought about by a rise in the respondents' appraisal of the current state of affairs (36/45), as opposed to their assessment of the future.

Going into this survey period, the expectations were already high compared to the appraisal of the current situation; whether the actual trends validate expectations remains to be seen. In terms of the overall environment, the conditions remain favourable with positive ecoonomic trends and improving relations with the EU.

Looking at trends from 2014 to 2016, expectations have improved year after year throughout the region (except in Albania). The index is now over 50% everywhere except in Bosnia and Herzegovina, recording significant hikes in larger, previously under-performing economies such as Serbia. The present satisfaction index paints a less optimistic picture, however.

It remains under 50% everywhere and is still more depressed in larger economies than the smaller ones (Albania being an exception). The overall sentiment index is mostly driven up by expectations, even in smaller economies because their satisfaction with the state of affairs has stalled lately (Kosovo* is an exception).

The results can be viewed through the prism of two principle factors. One is growth, which has picked up in larger economies, but has now lagged in the smaller ones (except in Kosovo*); the other is political stability, where there is more hope that democratic decision making will settle political disputes, while prolonged political conflicts and threats to legitimacy tend to depress both economic development and satisfaction with the current situation.

Overall, with positive projections for political stability, and the anticipated pick-up in economic recovery, satisfaction should continue to improve throughout the region.

Life Satisfaction and Assessment of General Trends

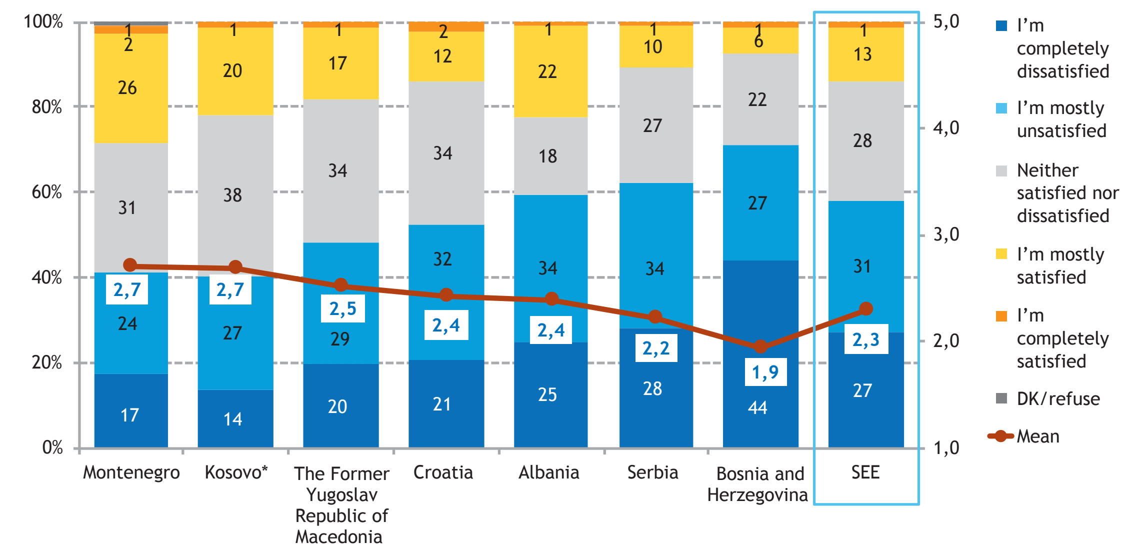
As noted above, the level of satisfaction remains at below average levels. The respondents' personal situation is assessed as better than that of the economy, or society, and while there is some improvement it is rather unimpressive.

Employment, or rather unemployment, remains the chief problem across the region. The overall economic situation comes in second, though it is somewhat less pressing than the year before. Worryingly, corruption seems to be growing in stature and importance it is afforded by respondents. Clearly, limited improvements in the economy are yet to translate into better opportunities on the labour market, while corruption usually accompanies improved economic performance.

Opinions about the need for investment are consistent with what is viewed as an economy's comparative advantage and the appraisal of sectors perceived as neglected. Industrial development and tourism are seen as growth areas, an assessment borne out by the facts and trends, while agriculture, for instance, is perceived as being neglected in the past. There is heightened awareness of violence against women, which is encouraging as it represents a critical step in dealing with this problem.

Figure 3: How satisfied are you with the way things are going in your society?

(All respondents - N=7026, share of total, %)



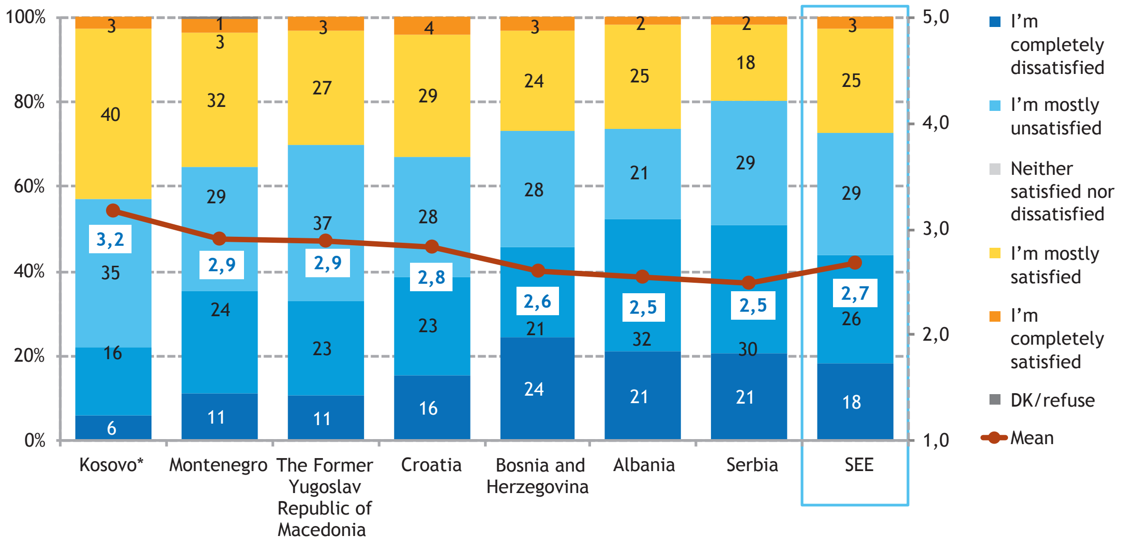
Satisfaction of respondents with the current situation in their own economy is below average, with the satisfaction rate (on a scale of 1 to 5) for the entire region measured at 2.3 (compared to a mean of 3.0).

58% of people are not satisfied with the current state of affairs against only 14% who are.

People from Kosovo* and Montenegro are significantly more satisfied than people in any other economy (their mean is 2.7).

Figure 4: How satisfied are you with the financial situation of your household?

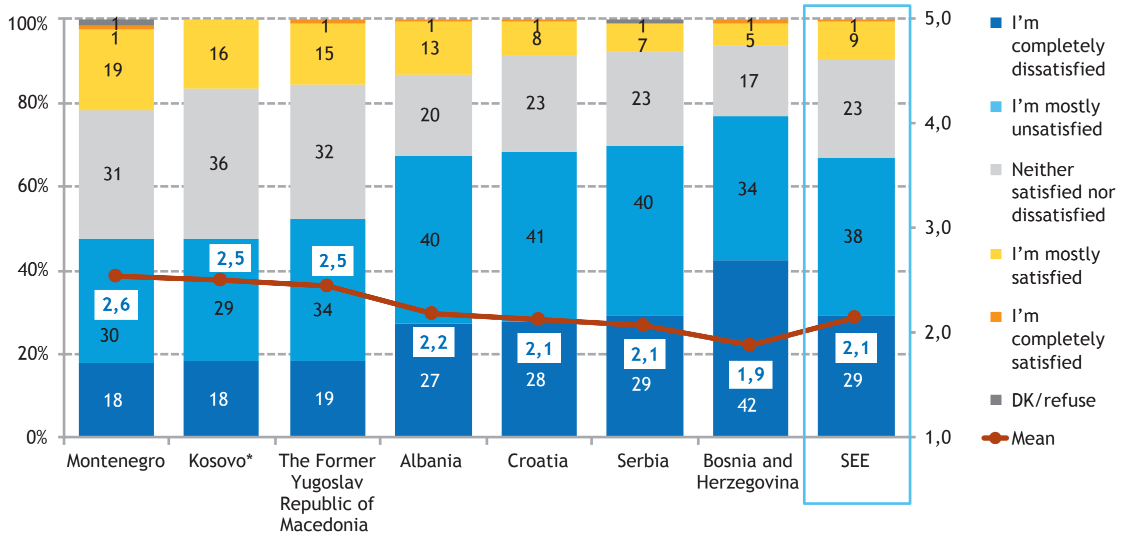
(All respondents - N=7026, share of total, %)



People in the SEE region are more satisfied with their own financial situation than with the overall state of affairs in their economy (mean 2.7). Respondents from Kosovo* are significantly more satisfied than people in all other economies (mean 3.2).

Figure 5: How satisfied are you with the economic situation in your society?

(All respondents - N=7026, share of total, %)



When it comes to the respondents' satisfaction with the economic situation, the findings are very similar to those recorded with regards to the assessment of the current state of affairs. Respondent satisfaction is below average (2.1), both across the SEE region and in every individual economy. As few as 10% of people in the SEE region are satisfied with the economic situation, whereas as many as 67% are not.

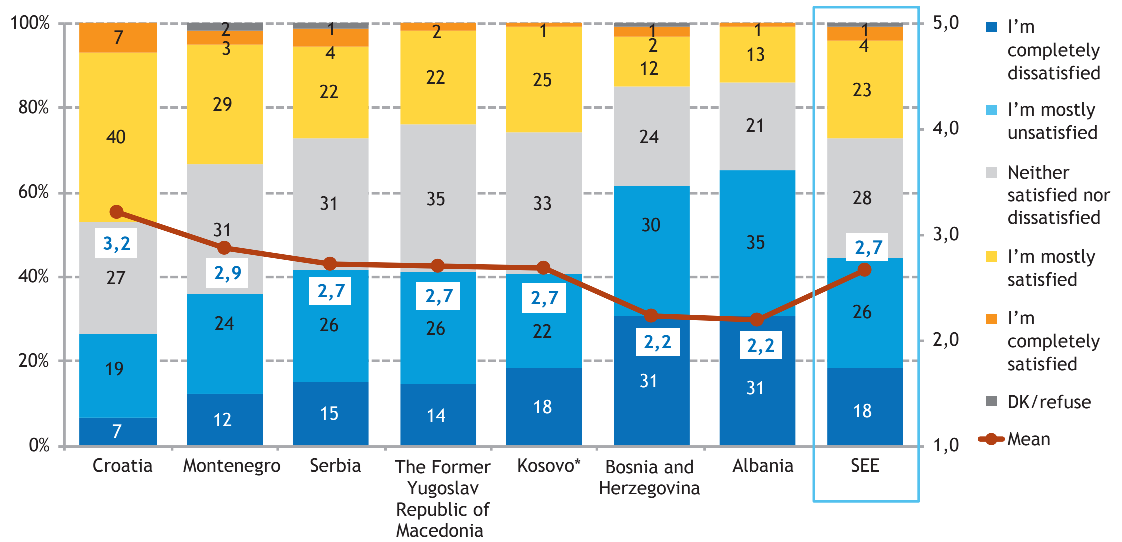
In comparison with the 2015 survey, satisfaction has not significantly increased at the level of the SEE region.

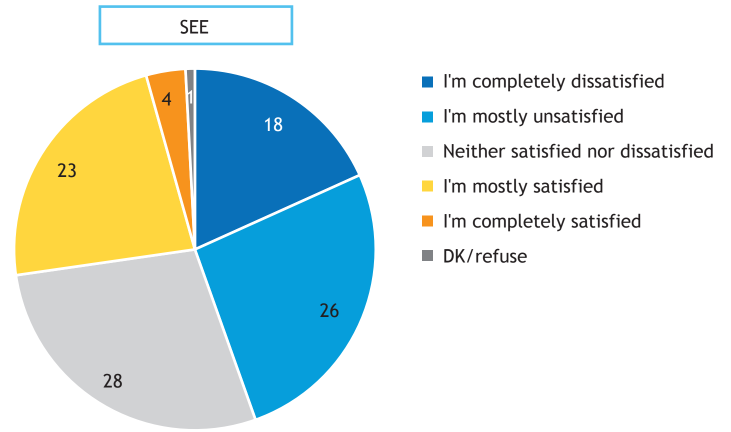
A comparison of individual economies finds a significantly higher satisfaction rates among the populations of Montenegro, The Former Yugoslav Republic of Macedonia and Kosovo* than among those of Serbia (2.1) and Bosnia and Herzegovina (1.9).

An analysis of individual demographic groups, and their respective satisfaction rates, indicates that the youngest category (18-29 years old) and those who rate their social status as above average are significantly more likely to be satisfied with both their own financial situation and the situation in their own economy.

Figure 6: How satisfied are you with the overall security situation in your economy (as concerns the level of risks of crime, terrorism, problems connected with uncontrolled migration, violent conflicts)?

(All respondents - N=7026, share of total, %)





Satisfaction with the overall security situation in the SEE region is below average (2.7). A little less than half of the population (44%) are dissatisfied with the level of security provided in their own economy, whereas 27% rate themselves as satisfied. In terms of individual economies, Croatian and Montenegrin respondents tend to feel more secure than individuals representing all other economies. The least satisfied are the people of Albania and Bosnia and Herzegovina.

Observing individual demographic groups, there is no difference among people of different gender and age, whereas those with a higher social status are significantly more satisfied (3.0) with the level of security in their own economy.

Figure 7: What are your expectations for the next year? Do you think that in 12 months your financial situation will be:

(All respondents - N=7026, share of total, %)

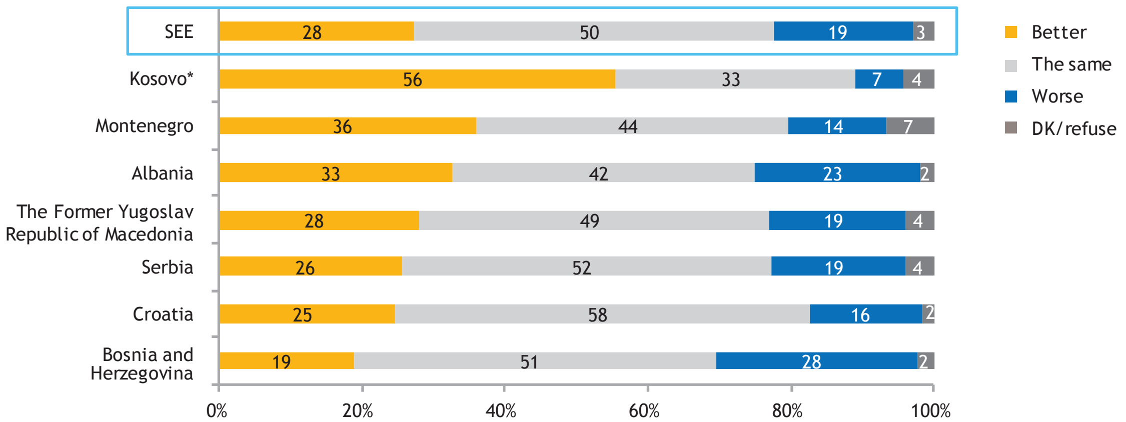
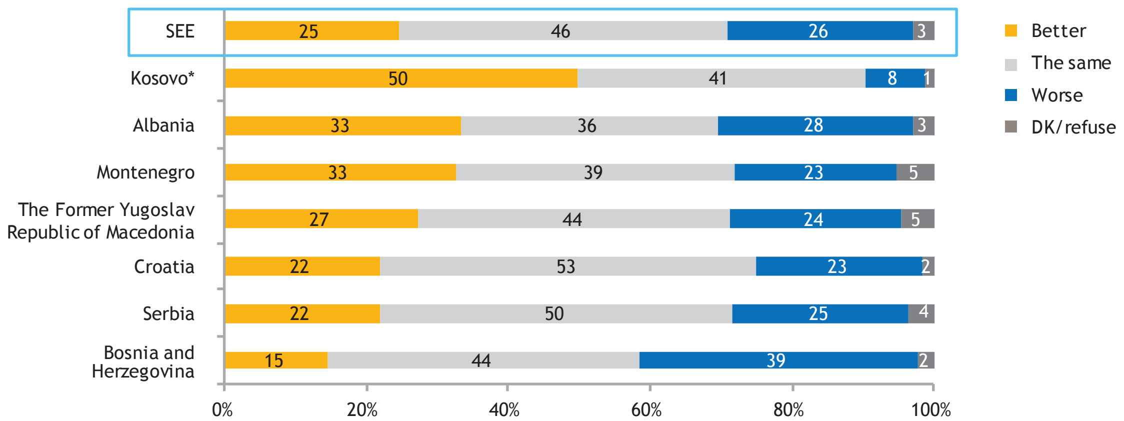


Figure 8: What are your expectations for the national economy? Do you think that in 12 months the state of the economy will be:

(All respondents - N=7026, share of total, %)



What are the expectations of the SEE population for the next 12 months in terms of personal financial situation and the national economy? Respondents tend to be somewhat more positive about their own personal financial situation (28% expect to see an improvement) than their respective national economy (25% expect that it will improve).

When it comes to respondents' personal financial situation, more people expect to see an improvement in their situation (28%) compared to those who foresee a deteririoration (19%).

In terms of the respondents' appraisal of own economies, the sentiment is split almost down the middle between those expecting to see improvements (25%) and those who feel the economy will go down further (26%).

The majority of respondents, however, foresee no change in either their personal financial situation or in the status of their national economy over the next twelve months.

People from Kosovo* continued to exhibit the most optimism in their outlook (56% expect their own financial situation to improve and 50% expect a betterment of their economy). Only 7% of the population in Kosovo* expect their own financial situation to deteriorate while a mere 8% foresee a slow-down in their economy over the next twelve months.

When it comes to the assessment of their own financial situation, respondents in all economies, except in Bosnia and Herzegovina, are more likely to foresee improvement than deterioration.

Looking at the assessment of the individual national economies, optimistic respondents in Kosovo*, Albania, Montenegro and The Former Yugoslav Republic of Macedonia outnumber their pessimistic counterparts. At the same time, the highest number of those who expect a deterioration in the status of their economy is found in Bosnia and Herzegovina (39%).

Demographically, the youngest respondents (18-29 years old), those with higher education, as well as individuals who rate their social status as above average are significantly more optimistic, both when it comes to their own finances and the economic situation in their society. Pessimism is significantly higher among those who rate their social status as below average, whereas senior citizens (over 61) are significantly more likely to see their own financial situation unchanged, likely as a result of fixed pension income.

There is a decrease in pessimism on both levels, personal and economy, when compared to previous years.

Table 4: Expectations for the national economy - comparison 2014/2015/2016

(Share of total, %)

	2014	2015	2016
Will be worse - financial situation in household	32,3	24,7	19,4
Will be worse - national economy	45,5	34,3	26,1

We compared the expectations regarding both personal financial situation and the national economic situation among the 28 EU Member States and five candidate countries.[3]

[3] European Commission: „Standard Eurobarometer 85“, Spring 2016; „Public opinion in the European Union“

Table 5: What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to the financial situation of your household? What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to the economic situation in (our country)?

(Share of total, %)

	Better	The Same	Worse
THE FINANCIAL SITUATION IN HOUSEHOLD			
Autumn 2015	23	62	12
Spring 2016	22	62	13
THE ECONOMIC SITUATION IN YOUR SOCIETY			
Autumn 2015	24	44	26
Spring 2016	21	46	26

Source: Public Opinion in the European Union, Standard Eurobarometer 85/86, Spring 2016/Autumn 2016

Interestingly, respondents from the SEE region exhibit a higher degree of optimism than their EU counterparts when it comes to how they see their personal financial situation developing over the next 12 months.

Specifically, 28% of the SEE population expect to see improvements in their household over the next twelve months compared to 22% among EU Member States. At the same time, the SEE region also boasts a higher proportion of respondents who belive that the situation will worsen in the coming year (19% for the SEE against 13% for the EU). These figures clearly indicate a region that is more prone to volatile changes and less stable than its EU neighbourhood; overall, 50% of SEE respondents expect to see no change versus 62% in the EU.

As for expectations regarding the national economic situation, the SEE region and the EU boast identical numbers of respondents who believe that the situation will deteriorate (26%) and those who do not expect to see any change (46%). The number of those who expect the situation to improve is slightly higher in the SEE region (25% versus 21% in the EU). Among EU countries, Greece is a leading contributor to the pessimist contingent with 64% of individuals polled predicting a worsening economic situation over the next twelve months, whereas the largest number of those who expect an improvement is found in Ireland and Malta (42%).

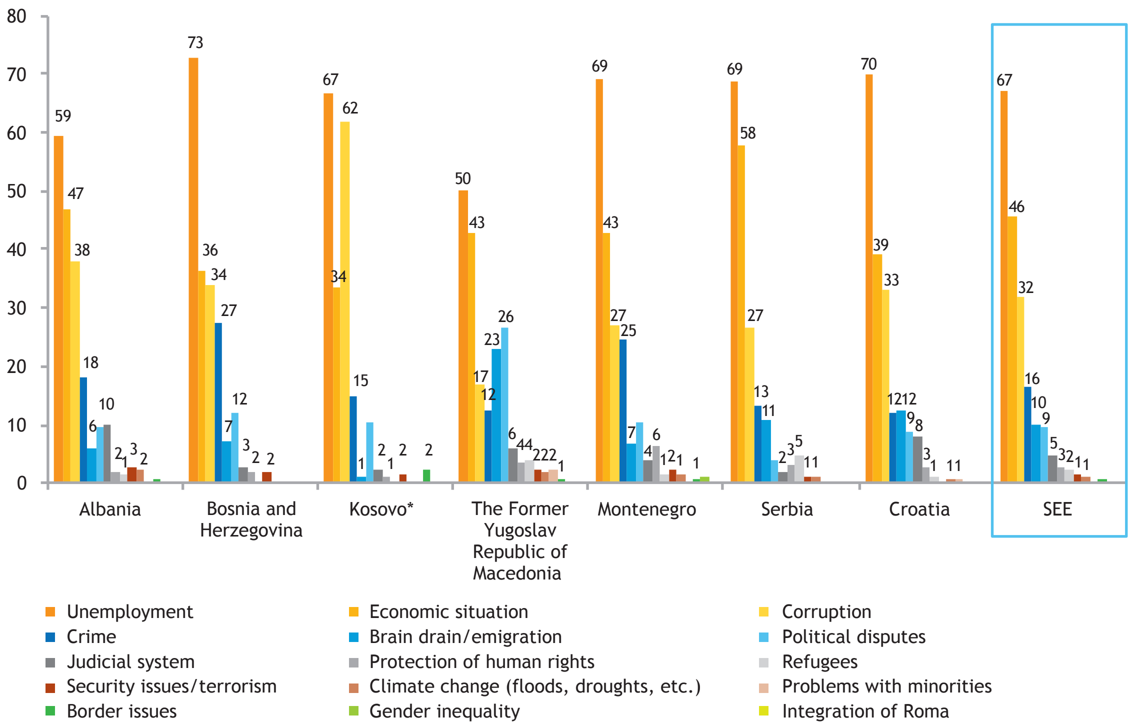
The biggest difference between the two regions is observed in the marked decline of pessimism in the SEE.

The proportion of the SEE population that expects a worsening in their own, as well as the national, financial situation has decreased significantly. At the same time, respondents from EU Member States foresee minimum, if any, change, in their personal finances while predicing a slight decline in national economic prospects.

The recovery in the EU is very slow with expectations that it will continue to be steady and sustained, if unspectacular. In contrast, the recovery in the SEE region, especially in the major economies, is progressing more rapidly, which results in a more optimistic outlook for the future. This conclusion is borne out by a review of inidividual economies where the level of optimism is directly co-related to national economic prospects.

Figure 9: What do you think are the two most important problems facing your economy?

(All respondents - N=7026, share of total, %)



The main concerns of the SEE population are unemployment (67%), the economic situation (46%), and corruption (32%).

Unemployment is perceived as the primary concern for respondents across all economies. Viewed individually, it is a far greater concern in Bosnia and Herzegovina (73%) than in The Former Yugoslav Republic of Macedonia (50%). The overall economic situation is the second most commonly cited concern in all economies except Kosovo*, where corruption is ranked a close second after unemployment. With the exception of Kosovo* and the Former Yugoslav Republic of Macedonia, where political disputes (26%) take third due to recent instabilities, corruption is perceived as the third most significant problem for the SEE region (32%). The Former Yugoslav Republic of Macedonia also stands out with significantly higher concerns regarding brain drain/emigration (23%), compared to the rest of the SEE region. Serbia boasts the largest contingent of respondents concerned by the economic situation while populations of Bosnia and Herzegovina and Montenegro are significantly more likely to perceive crime as a serious source of concern. Albania has a significantly larger proportion of respondents harbouring serious concerns about their judicial systems.

Table 6: The main concerns in SEE region - comparison 2015/2016

(share of total, %)

	2015	2016
Unemploymnet	68	67
Economic situation	55	46
Corruption	27	32
Crime	13	16
Brain drain/emigration	7	10

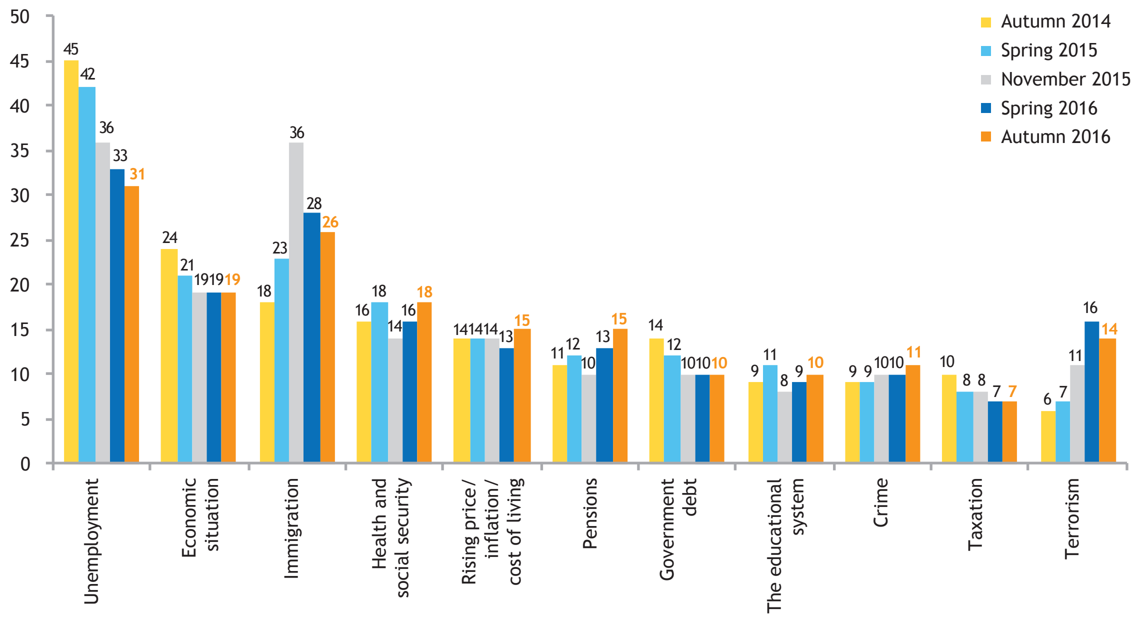
A comparison with 2015 findings shows that concerns regarding unemployment have remained largely unchanged, whereas anxieties over corruption, crime and "brain-drain" have increased. At the same time, the economic situation is perceived as less worrying than in 2015.

Looking at individual economies, the biggest changes were observed within the populations of Albania, Bosnia and Herzegovina and Montenegro where the number of people concerned about crime has significantly increased. Concern about corruption has also gained ground in Kosovo* and Bosnia and Herzegovina compared to 2015.

Demographic differences in perception reflect the diversity of interests and attitudes among respondent groups. The youngest cohort (18-29 years old) are significantly more likely to be concerned about unemployment and brain drain/emigration, while older age-groups are more worried about crime. Those highly educated as well as respondents who see themselves as belonging to a higher social class are significantly more concerned about brain drain/emigration and the operation of the legal system. People who rate their social status below average are more concerned about the economic situation and crime.

Figure 10: What do you think are the two most important issues facing (our society) at the moment?[4]

(Share of total, %)



[4]European Commission: Standard Eurobarometer 84 and 83, Spring 2015 and November 2015;„Public opinion in the European Union"

The figure 10 illustrates the results of the Eurobarometer for the 28 EU and five candidate countries (the most recent survey was conducted in the autumn of 2016). Although its survey questions are not identical to those of the Balkan Barometer, the general trends are comparable.

Unemployment remains a major concern among EU countries, followed by immigration, which was tied with unemployment in November 2015. Although unemployment continues to be seen as the most important problem among the EU countries, it has decreased in significance every year (2014: 45%; 2016: 31%). Similarly, concerns about the economic situation are decreasing and have now stabilised at 19% for the last three surveys.

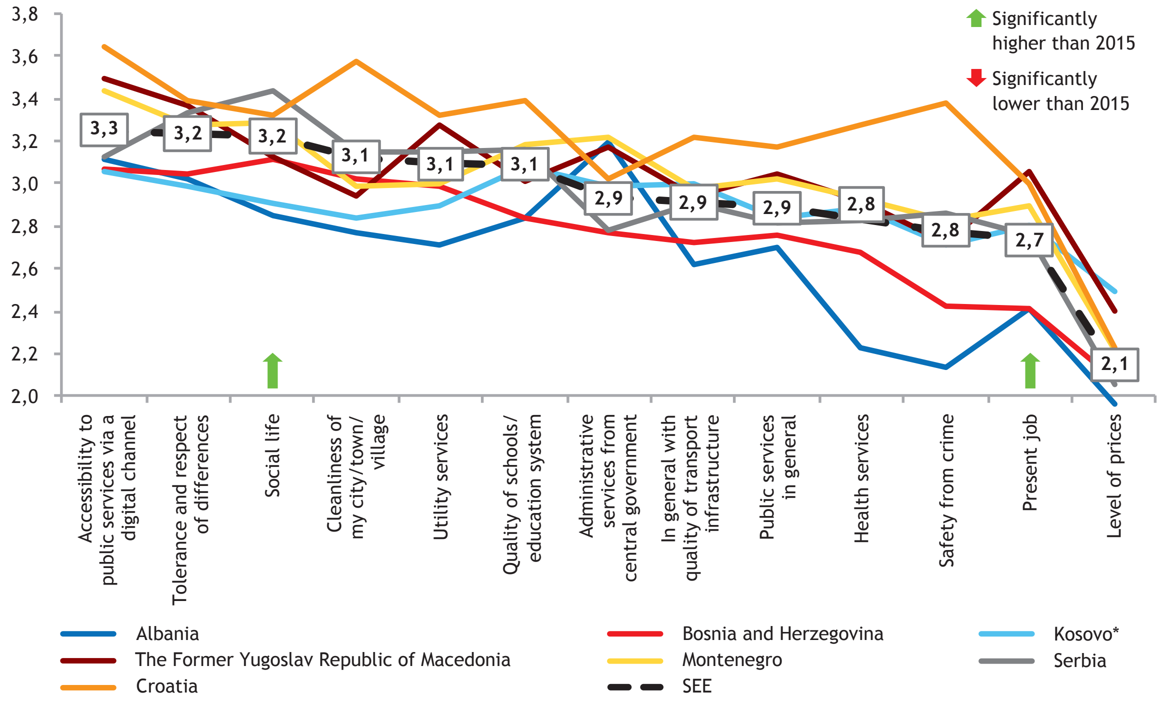
Immigration had been a growing concern until November 2015 when it started to decline, although it is still in second place. Immigration is perceived as the main problem in six EU countries, led by Malta (46%), Germany (45%) and Denmark (41%). Concern over terrorism had been continuously growing until spring 2016; it has since declined by 2%.

Unemployment remains the predominant concern across both the EU and the SEE region, although the numbers of concerned respondents are significantly higher in the latter (67% in the SEE against 31% in the EU). Concern about the economic situation has declined across both regions, although it is still ranked second in the SEE. The population of the SEE region is slightly more concerned about crime than their EU neighbours.

Having in mind the large discrepancy in unemployment rates between the EU and the SEE, coupled with a substantial difference in benefits and coping mechanisms on offer, the substantially higher number of concerned respondents in the SEE can easily be accounted for, regardless of improvements over the past 12 months. In fact, the uptake in the overall economic situation is yet to be fully translated onto the labour markets in the region while concerns over emigration continue to dampen the economic mood.

Figure 11: How satisfied are you with each of the following in your place of living?

(All respondents - N=7026, scores are on a scale of 1 to 5 where 1 means completely dissatisfied and 5 - completely satisfied, mean)



When it comes to all aspects of life under survey, the population of the SEE region is most satisfied with accessibility to public services via a digital channel (3.3), tolerance and respect of differences (3.2) and social life (3.2). They are least satisfied with price levels (2.1).

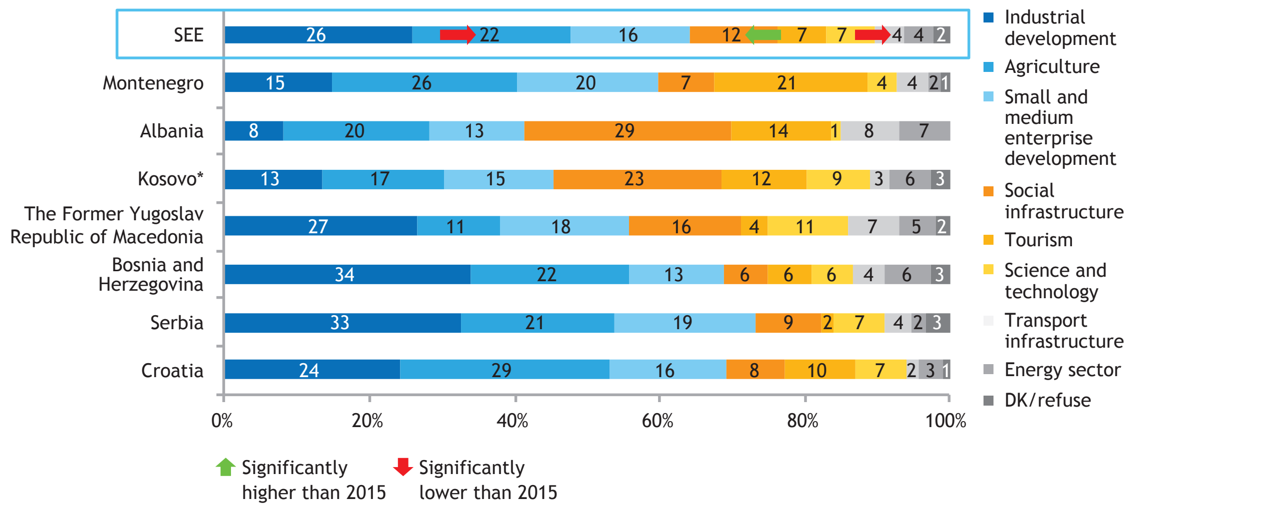
The populations of Montenegro and Kosovo* are most satisfied with the overall economic situation while the population of Serbia is more likely to be satisfied with its social life. People from The Former Yugoslav Republic of Macedonia are more satisfied with their present job whereas those from Kosovo* are happier with the level of prices.

People in Albania are still the least satisfied with all aspects under review with the exception of administrative services from central government, which are ranked as least satisfactory by respondents from Serbia and Bosnia and Herzegovina. In addition to respondents from Albania, the respondents from Bosnia and Herzegovina are the least satisfied across the board.

In comparison with the results of the 2015 survey, satisfaction with social life has slightly increased across the SEE region (2015: 3.0; 2016: 3.2) as has the respondents' happiness with their present job (2015: 2.5; 2016: 2.7). Comparing individual demographic groups, those highly educated are more likely to be satisfied with health and public utility services, social life, present job and prices. People who rate their social status as above average are significantly more satisfied with transport and public safety. The youngest cohort (18-29 years old) are more satisfied than others with social life while the older cohort of 30-45 years old tend to be the happiest with their present job.

Figure 12: When it comes to social and employment issues, in your opinion, in which of the following areas should your government invest its resources as a priority?

(All respondents - N=7026, share of total, %)



In order to improve the situation in the region, the respondents have set out the following public investment priorities: industry (26%), agriculture (22%), small and medium size enterprise development (16%), and social infrastructure (12%).

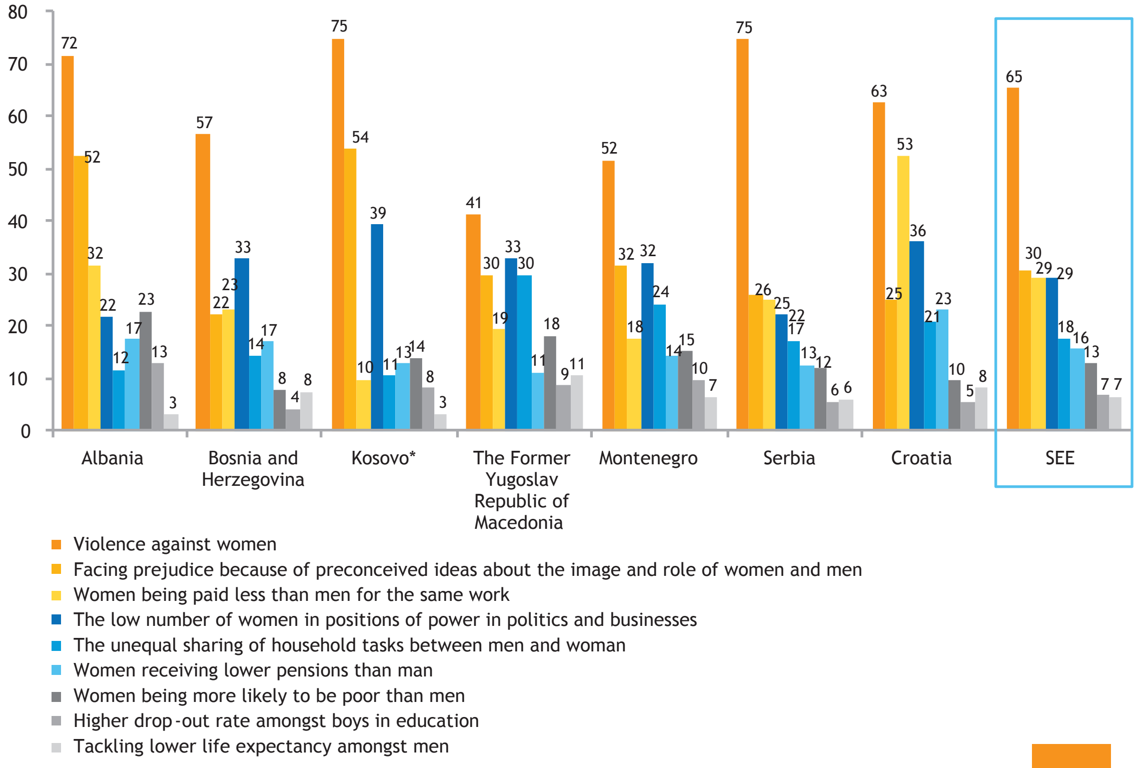
These results are reflective of an average across the SEE region. There are, however, significant variations between the individual economies. Kosovo* and Albania prioritize social infrastructure, such as schools and hospitals, to a much greater degree than others in the region. This can be directly attributed to chronic underinvestment in this sector over the previous decades. Montenegro, logically, considers investment in tourism particularly important while Croatia prioritizes agriculture more than any other economy. Investment in industrial development is highlighted most in Serbia and Bosnia and Herzegovina, economies that were heavily reliant on industry in the past.

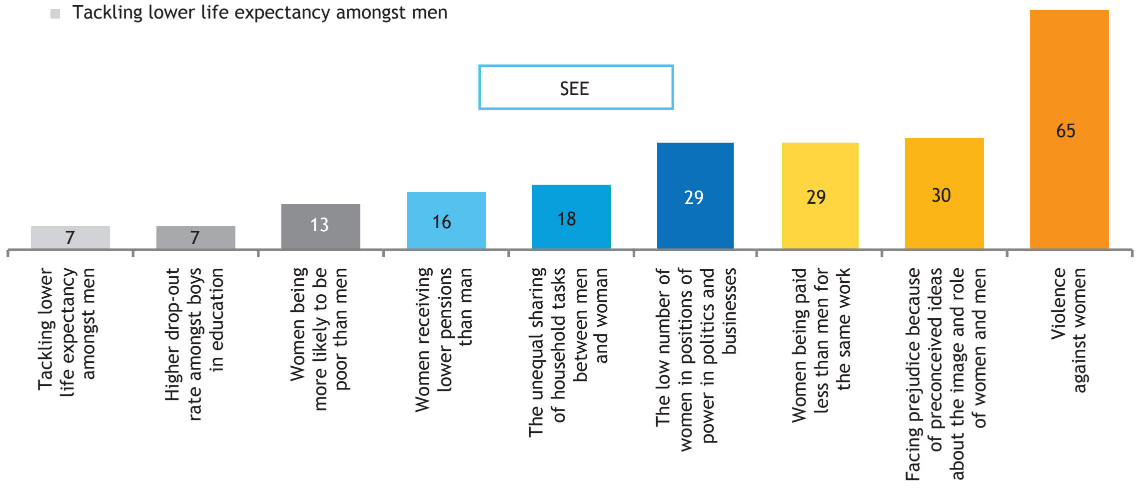
Science and technology are prioritized for investment by the youngest cohort (18-29), those university educated and inidividuals who rate their social status as above average. University degree holders are more likely to prioritize the energy sector, transport, social infrastructure and tourism whereas the youngest respodents feel that social infrastructure should be given priority, along with tourism. In addition to science and technology, individuals with above average social status also feel the government should invest more in the energy sector and tourism.

Compared to the 2015 survey, slightly more weight is afforded to social infrastructure while agriculture and transport seem to have slipped down the pecking order.

Figure 13: Here is a list of inequalities which men or woman can face.In your opinion, which area should be dealt with most urgently in your economy? (NEW QUESTION)

(All respondents - N=7026, maximum three answers, share of total, %)





Out of the nine issues assessing the various manifestations of gender inequality, respondents overwhelmingly identify violence against women as the most pressing issue. Three other issues seem to cause substantial concern: facing prejudice about the image and role of women and men; low number of women in politics; and women being paid less than men for the same work.

Respondents from The Former Yugoslav Republic of Macedonia were significantly less likely to consider violence against women as the most pressing problem(41%), but were significantly more likely to prioritize the issue of equal sharing of household tasks between men and women as well as the discrepancy in life expectancy between men and women.

Equal pay was rated as more important in Albania and least important in Kosovo* (only 10%).

Increased involvement of women in politics was rated as most important for respondents from Kosovo* (39%), lower pensions for women was most problematic for people from Croatia (23%) and higher school drop-out rates amongst boys to respondents from Albania (13%).

Men are more likely to be concerned about those aspects affecting them directly, such as shorter life expectancy, higher drop-out rate amongst boys in education as well as prejudice about the image and role of women and men. The youngest cohort (18-29) are significantly more likely to perceive violence against women as an urgent issue to be addressed whereas the oldest (61+) are significantly more likely to see lower pensions for women and shorter life expectancy of men as pressing issues. The highly educated cite much more frequently the prejudice about the image and role of women and men, as well as the low number of women in positions of power in politics and business.

Attitudes on Regional Cooperation and EU Integration

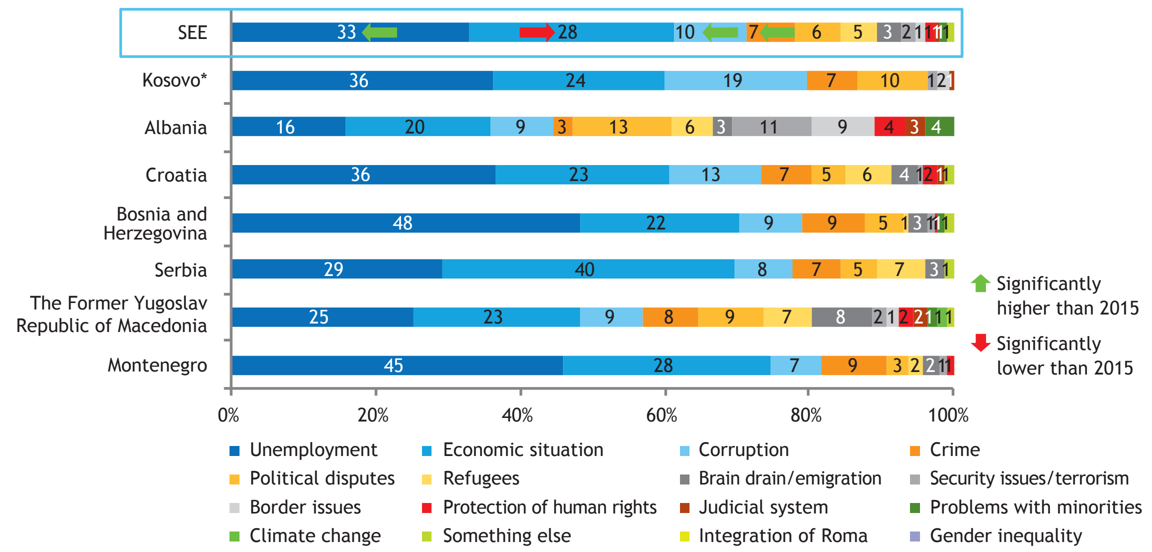
Regional cooperation continues to enjoy support, though with lessening enthusiasm over the past three years. This is, in part, due to growing intra-regional tensions, exacerbated by latent political instability.

EU integration has fewer supporters in the larger economies than in the smaller ones. Within the latter group, Kosovo* and Albania come out particularly strongly as pro-EU.

Consistent with growing outward migration, improved relations with the EU are favoured for reasons of access to education and jobs. Mobility is also a strong motivating factor. However, there is more pessimism when it comes to the prospects of EU accession in the near-term. A significant share of respondents believes that EU accession is not a realistic prospect, i.e. that it will never happen (Serbia, The Former Republic of Macedonia and Bosnia and Herzegovina).

Figure 14: What do you think are the most important problems facing the entire SEE region at the moment (Albania, Bosnia and Herzegovina, Croatia, Kosovo*, Montenegro, Serbia, The Former Yugoslav Republic of Macedonia)?

(All respondents - N=7026, share of total, %)



Unemployment is seen as the most important concern (33%) both at the national and the SEE level. The economic situation is ranked second (28%), followed by corruption (10%). All other issues were ranked as „most important" in fewer than 10% of cases across the SEE region.

Albania and The Former Yugoslav Republic of Macedonia buck the trend with a diverging set of concerns to those of the region as a whole. Respondents in Albania are significantly more likely to believe that political disputes, security issues/terrorism, border issues as well as minorities, represent more important problems for the region than unemployment, the overall economic situation and crime. Respondents from The Former Yugoslav Republic of Macedonia once again prioritize brain-drain as a key regional problem.

Corruption is highlighted much more in Kosovo* and Croatia, as are unemployment in Montenegro and the overall economic situation in Serbia.

Compared to the 2015 survey, the perception of the problems in the SEE region has changed somehwat with unemployment, crime and corruption now surging ahead of the economic situation as the most critical issues for the region.

Figure 15: Do you agree that the relations in SEE are better than 12 months ago?

(All respondents - N=7026, scale from 1 to 4, share of total, %)

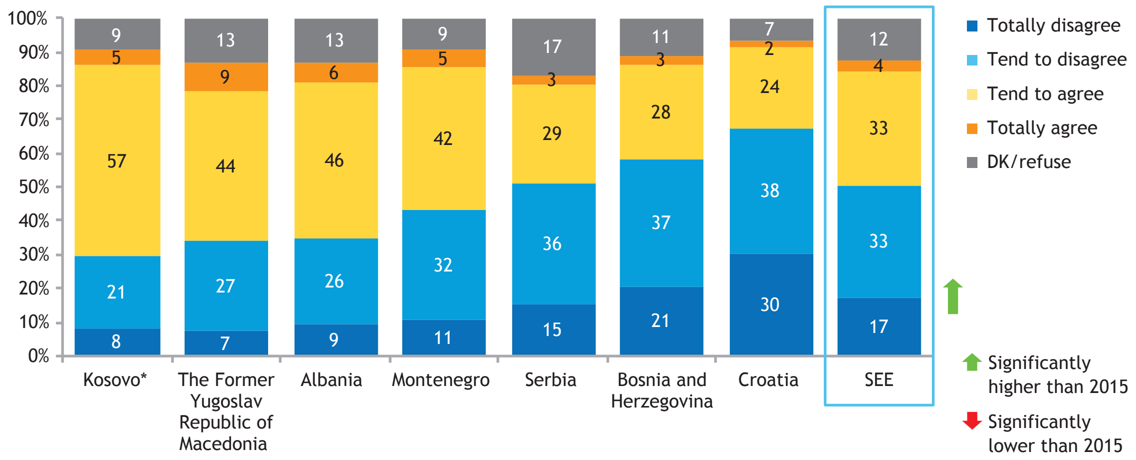
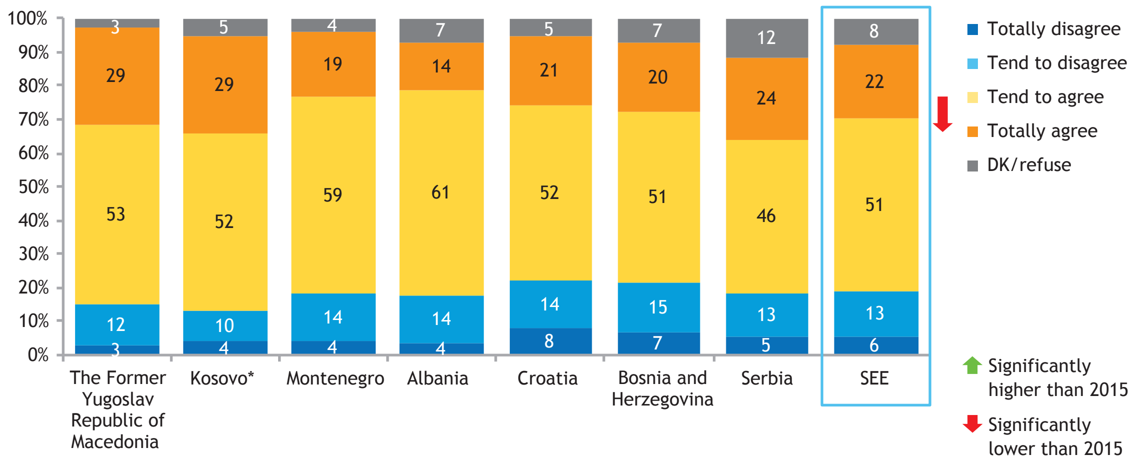


Figure 16: Do you agree that regional cooperation can contribute to the political, economic or security situation of your society?

(All respondents - N=7026, scale from 1 to 4, share of total, %)



37% of SEE respondents see a positive shift in relations compared to a year ago while half of then see no improvement.

Respondents in Kosovo* and The Former Yugoslav Republic of Macedonia are particularly positive in their assessment while 58% of respondents in Bosnia and Herzegovina see no change for the better.

No major variations have been noted between demographic groups while, compared to the 2015 survey, the number of those who report no improvement in relations increased significantly (disagreed with the statement in 2015: 45%; 2016: 50%). The biggest differences were observed in Croatia where 42% of the respondents disagreed with the statement in 2015 and as many as 68% did so in 2016. The decrease was noted in Kosovo* (39% disagreed in 2015 versus 29% in 2016).

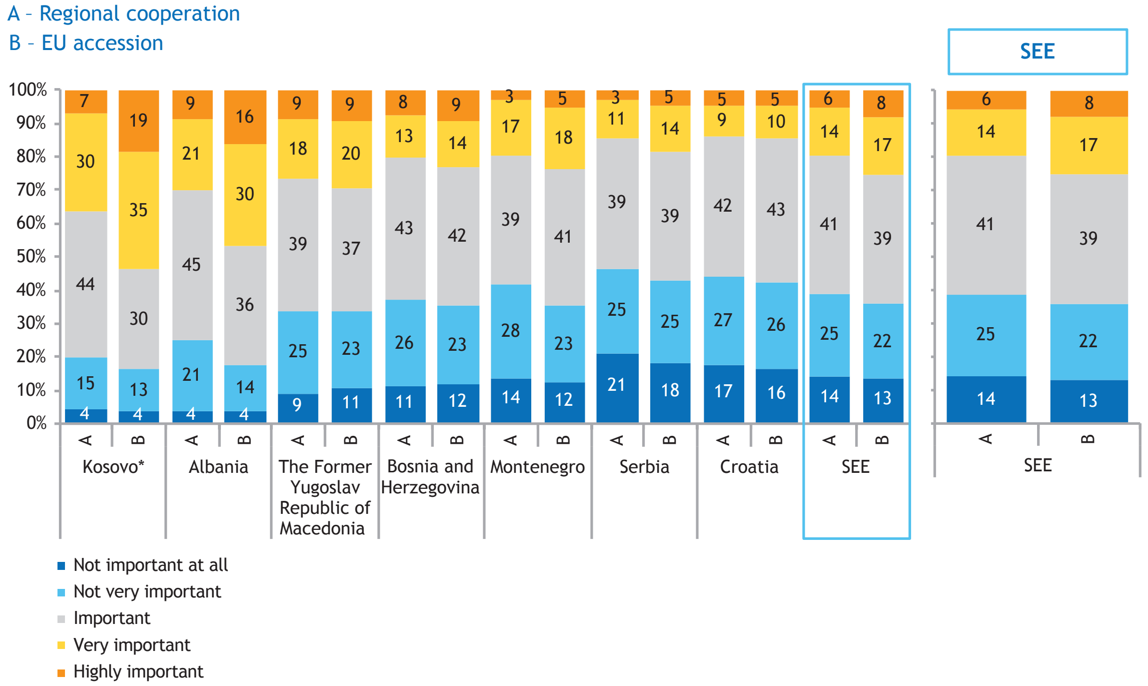
Although fewer people now believe that regional cooperation can contribute to the prosperity of the SEE region (down to 73% in 2016 from 77% in 2015), there are still some three quarters of the SEE population who believe in the benefits of regional cooperation.

The population of The Former Yugoslav Republic of Macedonia and Kosovo* are significantly more likely than others to see benefits of regional cooperation to the political, economic and security situations in their society (The Former Yugoslav Republic of Macedonia: 82% agree with the statement; Kosovo *: 81%; SEE average: 73%).

Figure 17: How important would you assess the issue of integration of Roma for: (NEW QUESTION)

(All respondents - N=7026, scale from 1 to 5, share of total, %)

A - Regional cooperation
B - EU accession



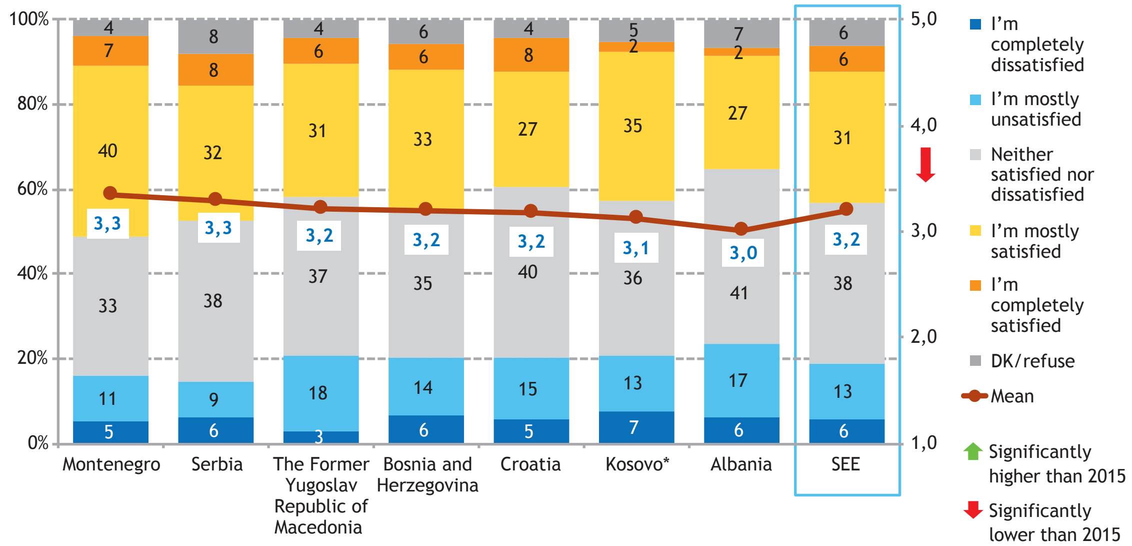
With regard to the perception of the most pressing concerns for cooperation within the SEE region (the survey included a menu of 15 issues), integration of Roma was not ranked highest in any of the SEE economies. Measured on a scale of 1 to 5, its importance to regional cooperation was estimated below the average: 2.6. Roma integration was not ranked highly as a consideration for EU accession either (2.7).

Looking across the region, the importance of Roma integration for regional cooperation and EU accession was ranked the highest in Albania and Kosovo* (Albania: 2.9; Kosovo*: 3.1), and the lowest in Serbia (2.4).

Across all demographic variables, the only significant outlier were the highly educated who were significantly more likely to believe that integration of Roma was important for both regional cooperation and EU accession (2.9).

Figure 18: How satisfied are you with the level of information available on developments in other parts of the SEE region?

(All respondents - N=7026, share of total, %)



People of the SEE region are fairly satisfied with the availability of information on the region (3.2). Majority are neither satisfied nor dissatisfied (38%), which may indicate a lack of interest. The respondents in Montenegro were notably more satisfied whereas other groups did not show any statistically significant difference.

In comparison with the 2015 survey, the population of the SEE region is less satisfied with the availability of information on developments in other parts of the SEE region (2015: 40% satisfied and 15% dissatisfied; 2016: 37% satisfied and 19% dissatisfied).

Figure 19: Do you think that EU membership would be (is - for Croatia) a good thing, a bad thing, or neither good nor bad?

(All respondents - N=7026, share of total, %)

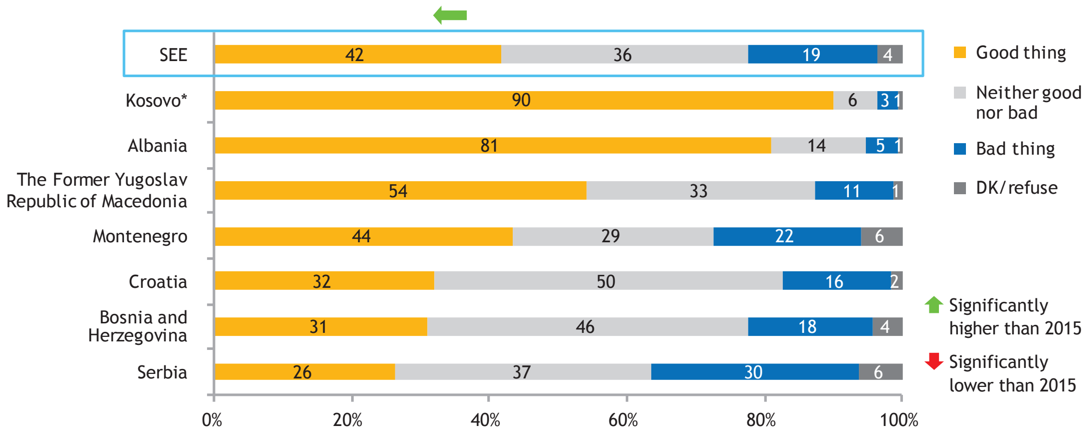
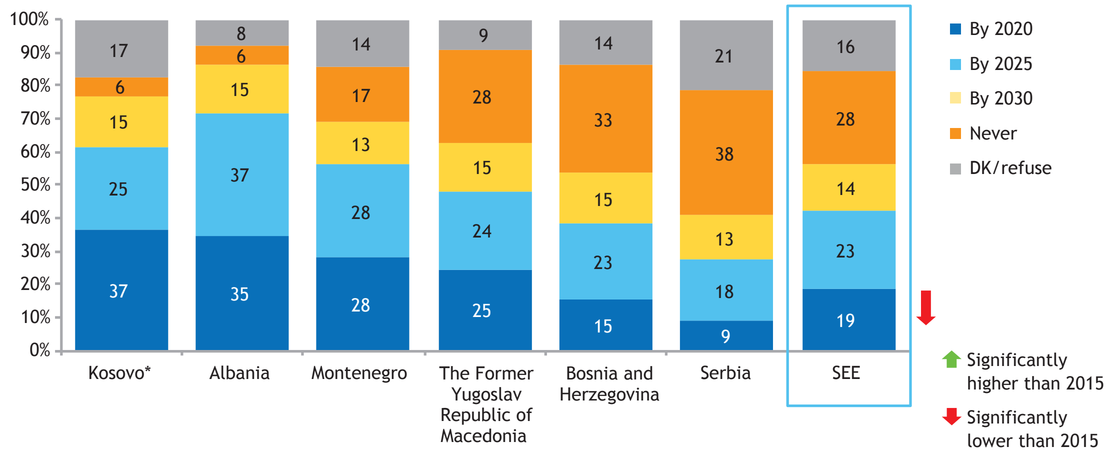


Figure 20: In general, when do you expect the accession to EU to happen?

(All respondents - N=7026, share of total, %)



After two years of stagnation (2014 and 2015), the number of those who believe that EU membership would be good for their society experienced a boost in 2016 (2015: 39%; 2016: 42%). Some one third of respondents still believe that EU accession is neither good nor bad (36%) while 19% think it bad for their society. There are, however, marked variations among individual economies. Over 90% of the population in Kosovo* and 81% in Albania see EU membership as something good. The Former Yugoslav Republic of Macedonia and Montenegro still have a larger proportion of those who consider it a good thing, whereas neutral opinions prevail in Bosnia and Herzegovina. Serbia is the only economy in the region where those who perceive EU membership as a bad thing (30%) outnumber those who view it positively (26%).

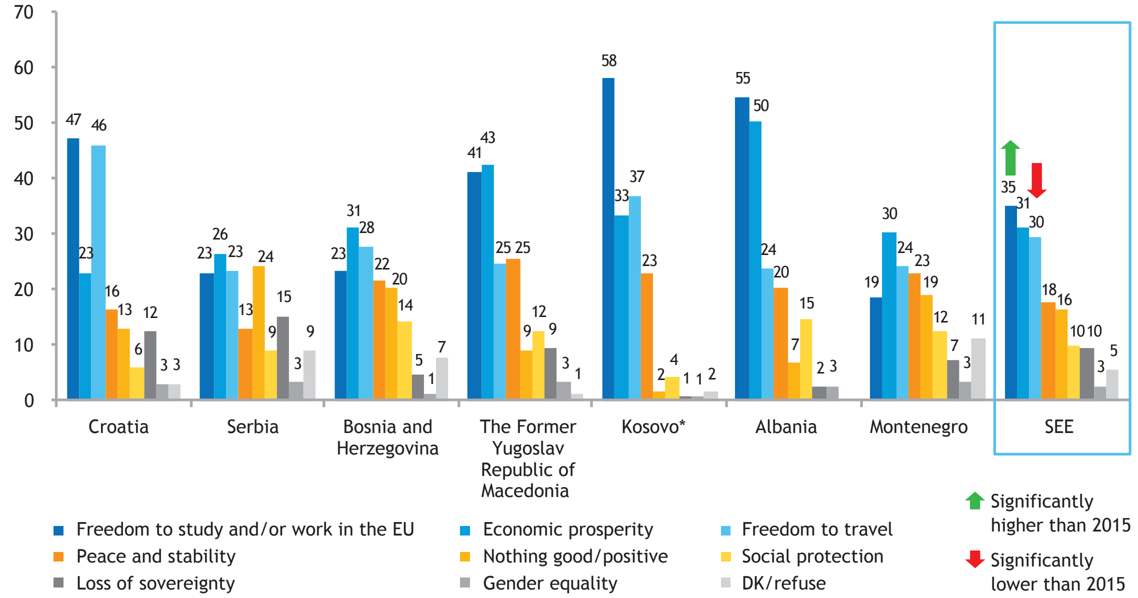
From a demographic perspective, the youngest cohort (58%), those with higher education (60%) and individuals who rate their social status as above average (60%) are significantly more likely to favour EU membership whereas those who rate their social status as below average (25%) are significantly more likely to be negative.

With regard to EU accession prospects, pessimism continues to grow given that there were fewer people in 2016 who forecast accession to the EU as early as 2020 (2014:27%; 2015: 24%; 2016: 19%). The highest proportion of respondents still feels that their economy will never integrate into the EU (28%), with pessimists particulary numerous in Bosnia and Herzegovina (33%) and Serbia (38%). While last year's survey found over half of the population of Kosovo* (62%) expected accession to the EU as soon as possible, or as early as 2020, this year saw a significant decline in expectations - only 37% expect to see accession as early as 2020.

People who rate their social status as below average are particularly likely to be pessimistic and convinced that their economy will never join the EU (33%). On the other hand, the youngest and those who rate their social status as above average are the most optimistic about accession to the EU as early as 2020 (18-29: 30%; those who rate their social status as above average: 40%).

Figure 21: What would EU membership mean to you personally?

(All respondents - N=7026, maximum two answers, share of total, %)



People from the SEE region primarily associate EU membership with freedom to study and work (35%), economic prosperity (31%) and freedom to travel (30%).

In comparison with the previous two surveys in 2014 and 2015, the number of those who associate EU membership with freedom to study and work has continued to increase (2014: 28%; 2015:32%; 2016:35%) while the number of those who see the benefit in freedom to travel is on the decline (2014:35%; 2015:31%; 2016:30%).

There are major differences between the economies: in Kosovo*, where 90% of the people perceive the EU as a good thing, some 37% of the population prioritize freedom to travel, largely due to the fact that they are yet to benefit from EU visa liberalisation.

In Albania, where more than 80% of people perceive EU membership as a good thing, more people see benefits of EU membership in freedom to study and work (55%) and economic prosperity (50%). Together with Albania, The Former Yugoslav Republic of Macedonia stands out with a high number of respondents who associate EU accession with economic prosperity (43%).

Serbia boasts the highest number of respondents who are ambigous about EU membership, or rather see nothing particularly positive or negative coming out of accession (24%) as well as those who associate EU membership with a loss of sovereignty (15%).

As anticipated, the youngest cohort (18-29) are significantly more likely to see the benefits of the EU in the freedom to travel (34%) and to study and work (51%). The advantages of the EU in regards to the freedom to study and work is significantly more pronounced among highly educated people (45%). The oldest cohort (61 years and over) and those who rate their social status as below average are significantly more likely to see nothing positive or good about EU membership.

Unemployment and Risk of Poverty

The perception of the labour market is one of stagnation. Job security is also yet to improve so the conclusion is that the labor market has not cought up with the pace of economic recovery. In fact, the situation across some segments seems to be deteriorating.

The number of people still outside of the labour market is high or very high across some economies. The number of retired persons and those depending on remittances from abroad is significant.

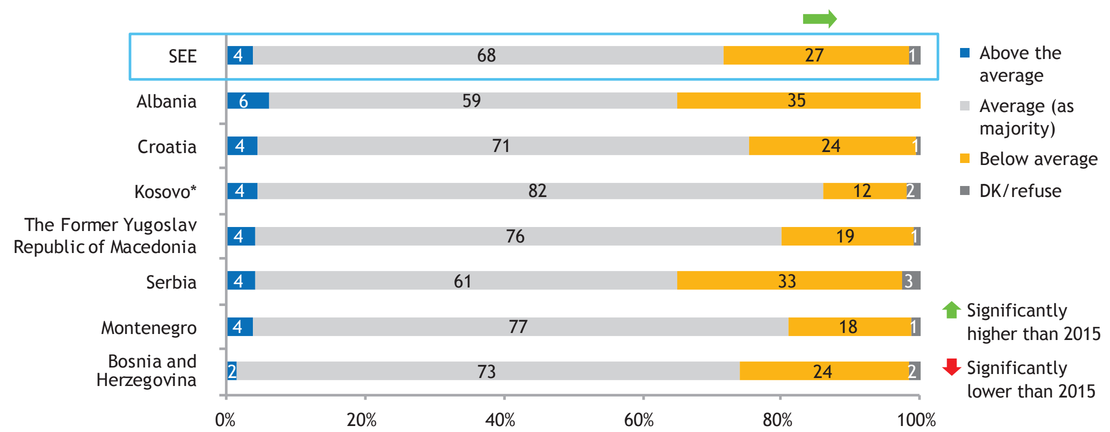
Inequality seems to be on the rise, not unusual when economic performance starts to improve. Those left behind feel even more disadvantaged than before.

Poverty is a risk, with a significant number of households needing to ration their consumption. This relates, in particular, to non-essential items such as holidays or cultural goods. Also, some households experience problems with paying their bills on time or financing their debt obligations.

Overall, the risks of poverty are not increasing, at least not sharply, but they are not declining either.

Figure 22: How would you estimate your current socio-economic status?

(All respondents - N=7026, share of total, %)

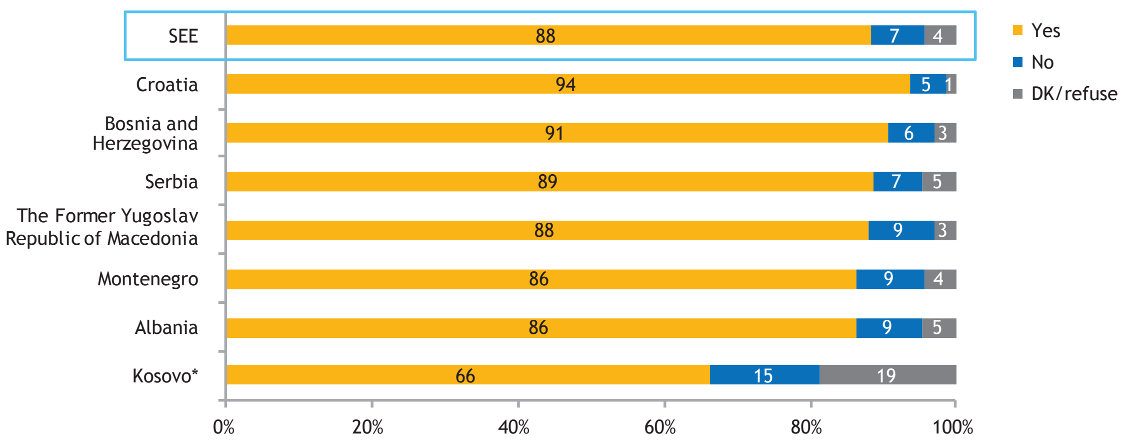


Based on social self-positioning (where the respondent sees him or herself against the majority, i.e. better, worse or average), polled inidividuals from SEE overwhelmingly identify themselves as average (68%), 4% believe their living standard to be above average and 27% below. Compared with the 2015 survey, the proportion of the population who rate their social status as below average has increased (2015: 24%; 2016: 27%).

In Serbia and Albania, there is a higher proportion of those living below the average (Albania - 35%, Serbia - 33%) whereas in Kosovo* the vast majority identify as average (82%). Highly educated people are significantly more likely to live above or at average (above average: 8%; average: 78%). The youngest cohort are notably more likely to live an "average life" (79%) while the oldest (32%) and the low-skilled (41%) are significantly more likely to live below the average.

Figure 23: Do you think that the gap between the rich and the poor is increasing in your economy?

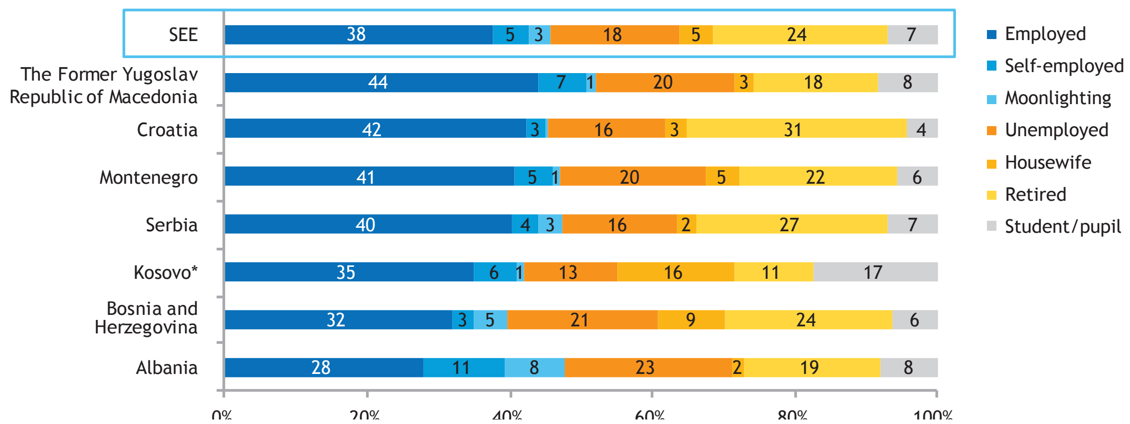
(All respondents - N=7002, share of total, %)



The vast majority (88%) in the SEE region consider the gap between the rich and the poor as increasingly prominent in their economies, with numbers particularly high in Bosnia and Herzegovina (91%). Kosovo*, who is at the other end of the spectrum with the fewest positive responses in the region, still boasts a high number of respondents who see the gap as widening (66%). The responses were very much conditioned by status; those who rate their social standing as above average are significantly less likely to perceive the gap between the poor and the rich as widening (16% do not notice the gap) as opposed to those who rate their social status as below average (94% notice the gap).

Figure 24: What is your current working status?

(All respondents - N=7026, share of total, %)

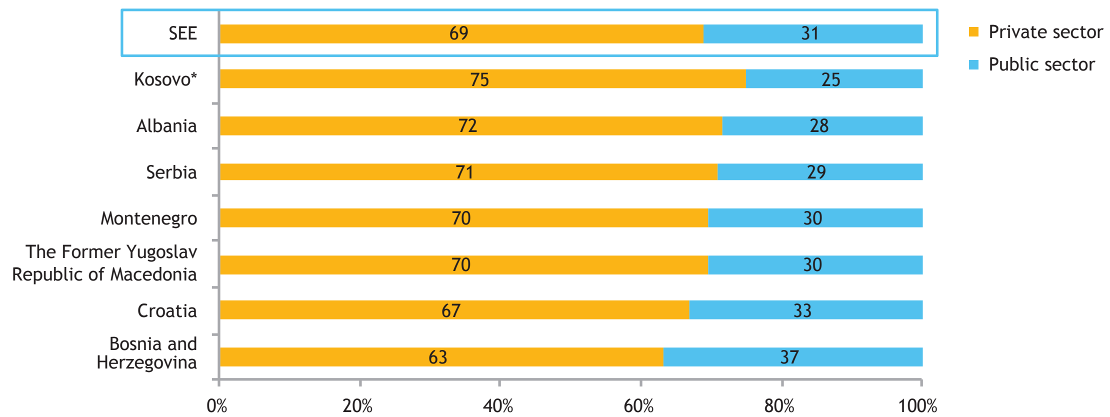


In the SEE economies, almost half (46%) of the population are employed, including those self-employed (5%) and those moonlighting (3%).

Looking at the numbers across the economies, there are significantly more self-employed people in Albania (11%), along with moonlighting workers (8%); Croatia has the highest proportion of retirees (31%); Kosovo* has most students (17%) and housewives (16%).

Figure 25: If you are employed is it a private or public sector employment?

(Employed and self-employed people, N=3202, %)

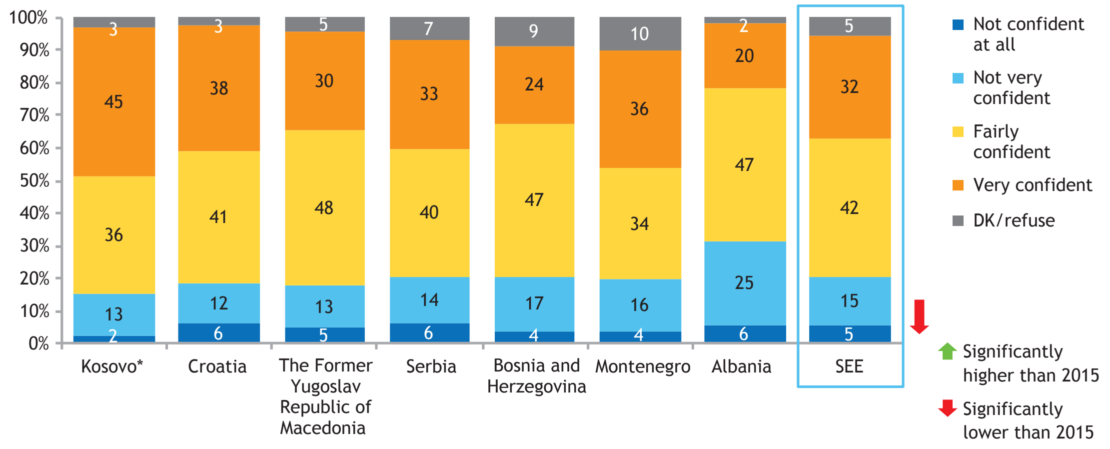


Among the employed and self-employed people in the SEE region, most work in the private sector (69%) whereas about one third (31%) work in the public sector or state owned enterprises. In Bosnia and Herzegovina, there are notably more employees in the public sector (37%), indicating a bloated public administration.

The youngest cohort (18-29 years old) are significantly more likely to work in the private sector (83%) whereas the older (46-60) (38%) and highly educated (43%) are found more frequently in the public. It is interesting that there is no statistically significant difference between people of varying social status with regard to the sector in which they work.

Figure 26: How confident are you in keeping your job in the coming 12 months?

(Employed and self-employed people, N=3202, %)



The employed are predominantly optimistic about keeping their jobs in the coming 12 months. In fact, 74% of them are confident that they will keep their job whilst 20% are not very confident. Compared with the 2015 survey, confidence in job retention has slightly risen (2015: 30% were not confident of keeping the job; 2016: 20%). Among the employees in Kosovo*, there are notably more of those who are confident of keeping their job in the coming 12 months (81%).

Those who rate their social status as above average are notably most confident of keeping their job (90%).

Figure 27: How many people in your family who are able to work are employed?

People who are able to work are those who are 15 and older, who are not in regular education and do not have any other obstacle for working such as disability.
(All respondents - N=7026, share of total, %)

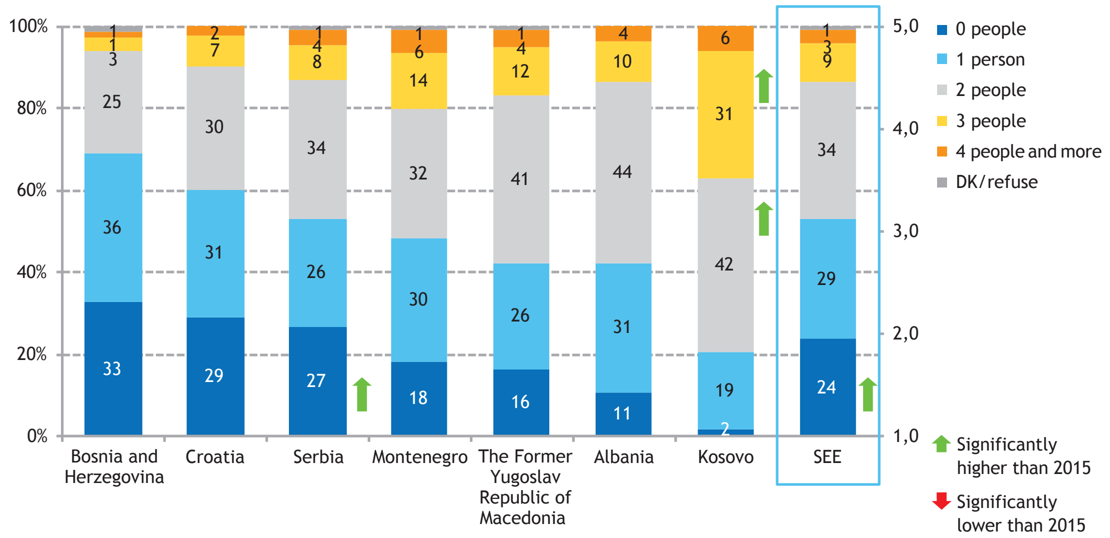
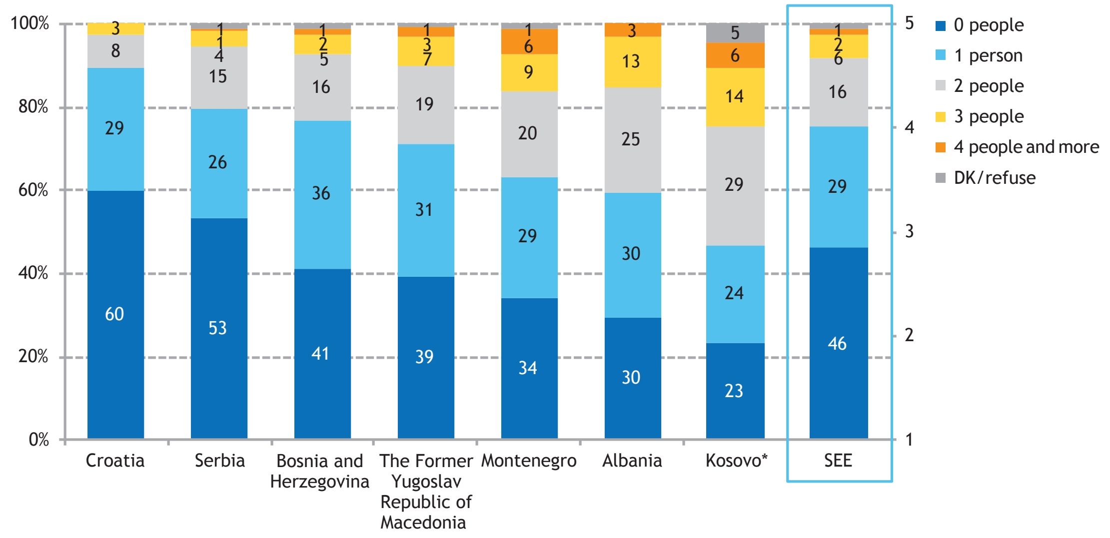


Figure 28: How many people in your family who are able to work are unemployed?

People who are able to work are those who are 15 and older, who are not in regular education and do not have any other obstacle for working such as disability.
(All respondents - N=7026, share of total, %)



The results of the survey indicate that 24% of households surveyed in the SEE region have no employed members whereas 63% have one or two. Compared with the 2015 survey, the number of households with no employed members has increased slightly (2015: 22%; 2016: 24%).

Having analysed the number of employed across the individual economies, Kosovo* is singled out with a significant share of households with three members employed (31%). Compared to 2015, Kosovo* shows an increase in the number of households with two or three employed members with a simultaneous decrease in the number of families with only one employed member (2015: 32%; 2016: 19%). Bosnia and Herzegovina stands out with the number of families that do not have a single member employed (33%) or those that have only one (36%). Compared to the 2015 survey, Serbia has registered an increase in the number of families without employed members (2015: 20%; 2016: 27%).

46% of families have no unemployed members (who are able to work) and 29% of families have only one member able to work who is also unemployed.

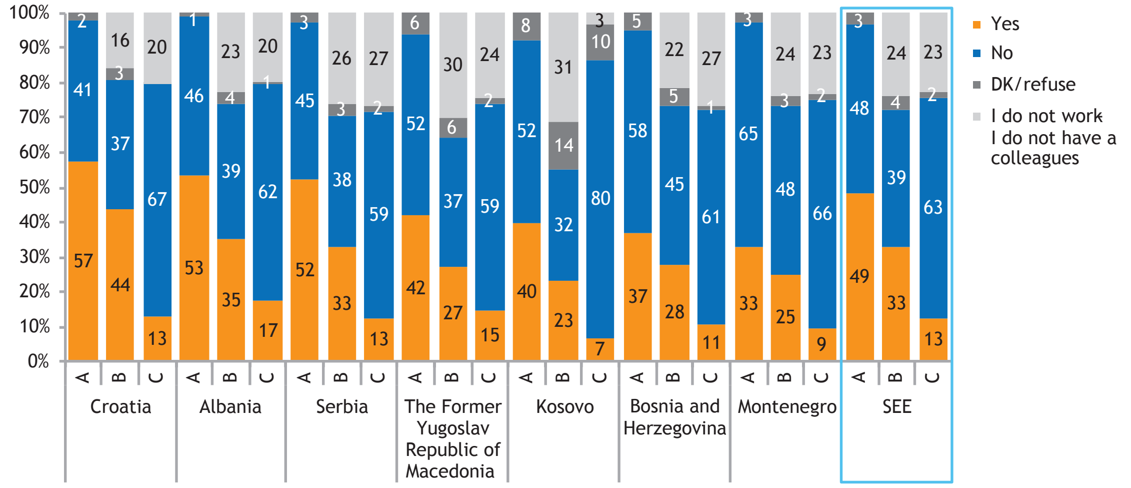
There are significantly more families without unemployed members in Croatia (60%) and Serbia (53%) while Kosovo * stands out with a larger number of unemployed persons per family (49% of households have two or more unemployed persons who are able to work). Kosovo * is statistically unusual as it has both the highest number of employed and unemployed households members which can be accounted for by the larger average size of families in this economy.

Within the oldest age group, the majority of households have no unemployed member (58%), likely due to the high proprtion of retirees in this category. The same is true for those who rate their social status as above average (53%).

Figure 29: Did any of the following situations happen to you in the past three years?

(All respondents - N=7026, share of total, %)

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?

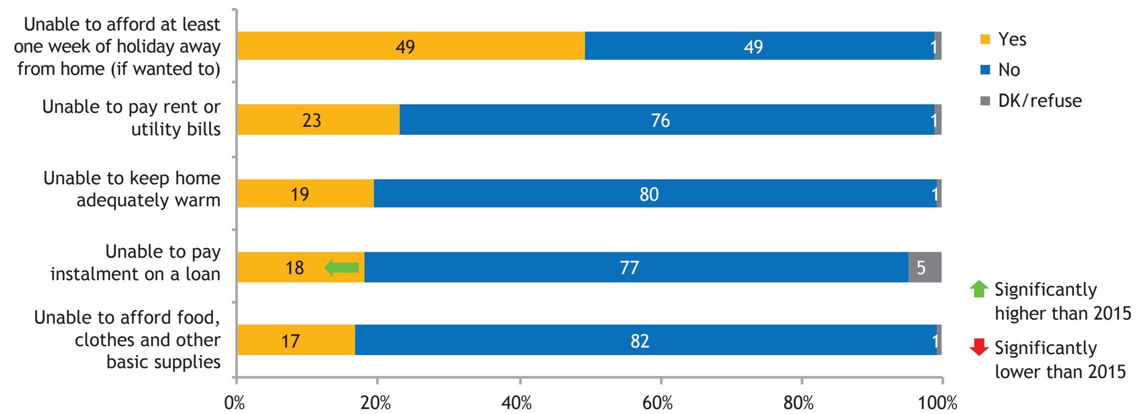


Compared with the results of the 2014 and 2015 surveys, the number of those who lost their jobs remained unchanged (2014:13.5%; 2015:13%; 2016:13%).

Albania is an unfortunate regional leader in this category with 17% of respondents in this economy losing their jobs over the past 3 years.

Figure 30: Did your household face the following problems (even at least once) during the past 12 months? (Results for SEE)

(All respondents - N=7026, share of total, %)



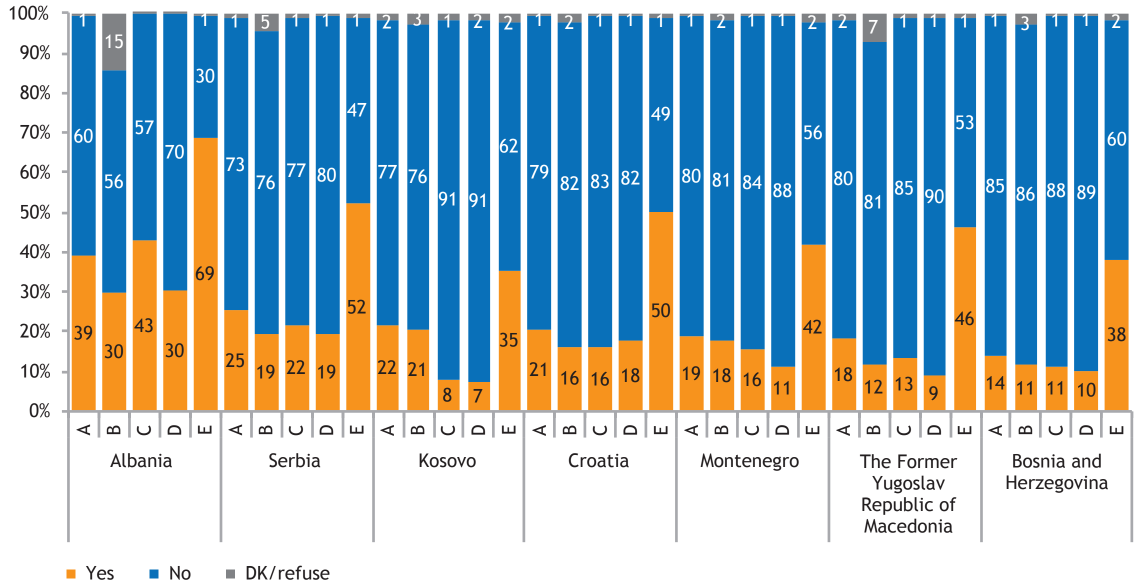
One of the five things that the majority of people in the region were unable to afford over the past 12 months is a weeklong holiday away from home (49%). 23% of the population could not pay all the bills, 19% were unable to keep their home adequately warm, while 17% were unable to afford basic supplies, such as clothes, food and the like.

Compared with the 2015 survey, the situation has changed only in terms of payment of loan instalments. The number of people who were unable to pay instalments has increased (2015: 15%; 2016: 18%).

Figure 31: Did your household face the following problems (even at least once) during the past 12 months? (Results by economies)

(All respondents - N=7026, share of total, %)

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)

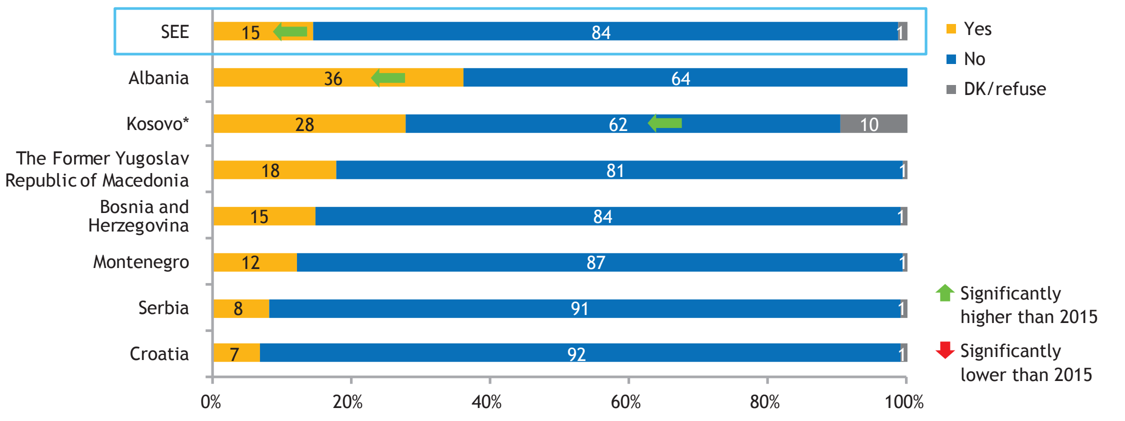


A cross-economy analysis of the five surveyed items indicates that Albania stands out with a higher proportion of people unable to afford all of the five surveyed items. In Albania, as many as 39% of households were unable to pay utility bills at least once and 43% were unable to keep their home adequately warm. Serbia has a significant number of households that were unable to keep their home warm (22%).

Listed problems were notably more pronounced among those who rate their social status below average and within the low-skilled population. People in the age group of 46-60 years were unable to pay utility bills and loan instalments more often than others.

Figure 32: Did your household receive help, at least once in the past 12 months, in the form of money or goods from another individual living abroad?

(All respondents - N=7026, share of total, %)



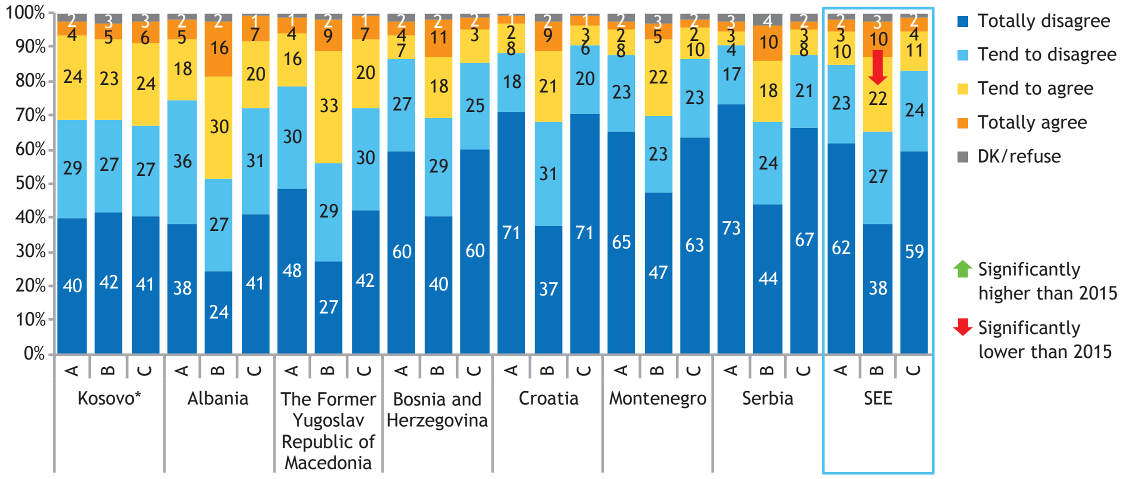
The vast majority of the SEE population (84%) has not received any assistance in the past 12 months from persons living abroad. Compared with the 2015 survey, the number of those who have received some assistance over the past 12 months has increased (2015: 12%; 2016: 15%). The largest difference is observed in Kosovo* where the number of people receiving assistance has decreased (2015: 45%; 2016: 28%); Kosovo* is notable for the normally high instance of remitance payments received. Albanian households, however, have recorded an increase in assistance received (2015: 19%; 2016: 36%).

Households in Albania (36%) and Kosovo* (28%) have tended to receive more assistance while respondents from Serbia (8%) and Croatia (7%) record the fewest such instances.

Figure 33: To what extent do you agree with the following statements:

(All respondents - N=7026, share of total, %)

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



With regards to the survey's examination of social inclusion and the respondents' perception thereof, only 15% consider themselves socially excluded, while only 13% think that people look down on them because of their income or job situation. 32% of respondents, however, ackowledge that there is a risk of falling into poverty.

Compared with the 2015 survey, the situation has changed only in terms of anxieties surrounding poverty which have declined within the SEE community (down to 32% from 35% in 2015).

People from Kosovo*, Albania and The Former Yugoslav Republic of Macedonia are significantly more likely to feel left out of society and looked down upon because of their financial situation, whereas Albania (46%) and The Former Yugoslav Republic of Macedonia (42%) also have higher proportions of respondents who fear falling into poverty.

As anticipated, the findings are linked to education level and social status. Respondents who rate their social status as below average and are less educated are significantly more likely to agree with all three statements. In addition, the oldest segment of the population (over 61) is notably more likely to agree with the statement related to the fear of falling into poverty.

Employability and the Labour Market

The overriding perception when it comes to the critical prerequisite for securing employment is knowing the right people. This is highly suggestive of an underperforming labour market framework and supply significantly outpacing demand.

There is also an overwhelming preference for employment in the public sector due to better job security but also at least in part due to the pronounced importance of personal connections. Remuneration tends to be better in the private sector but this does not seem to significantly alter preferences by prospective employees. The size of remuneration is also likely offset as a consideration by better pension and social security benefits in the public sector.

Own skills and education are seen as adequate, though there is readiness to invest in further development, if needed, to gain or retain employment, or to advance.

Employees have a preference for consultative rather than authoritarian management styles, which is usually a sign that they tend to identify with their employers.

Figure 34: What do you think is most important for getting ahead in life?

(All respondents - N=7026, share of total, %)

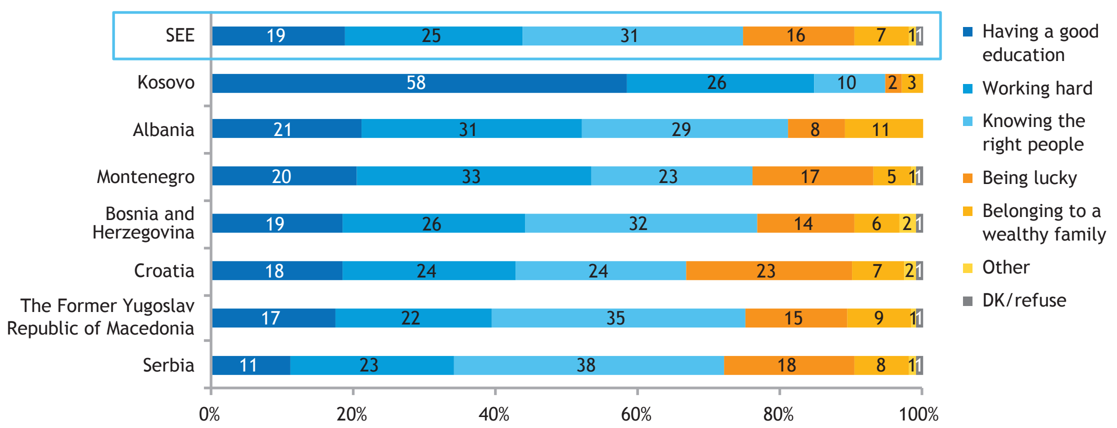


Table 7: What do you think is most important for getting ahead in life - comparison 2014/2015/2016

(Share of total, %)

	2014	2015	2016
Working hard	25	25	25
Having a good education	23	22	19
Knowing the right people	**23**	**28**	**31**

In terms of getting ahead in life, the largest segment of respondents, rather dispiritingly, considers knowing the right people as the most important factor (31%). Working hard comes in second (25%), while a good education is third (19%). Compared to 2014 and 2015 surveys, a statistically significant increase is recorded for the group that prioritizes connections over all other considerations. Education seems to be less prominent while hard work remains as important as in previous years.

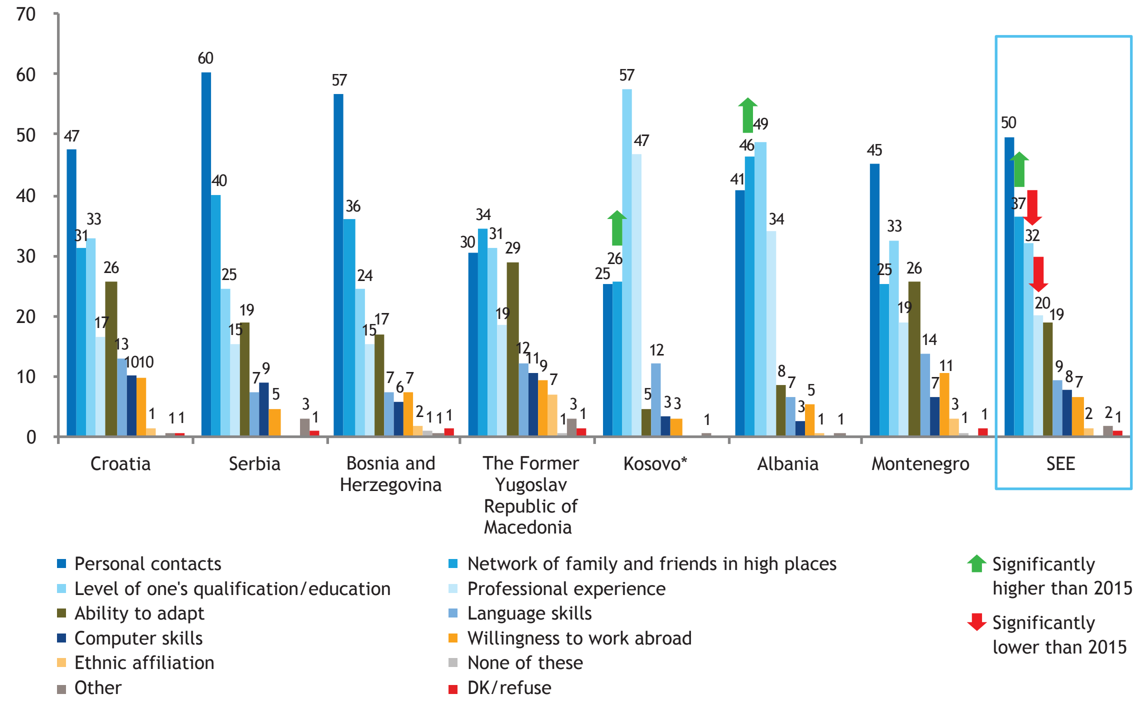
Across all seven economies, the largest difference is recorded in Kosovo* where education is considered as significantly more important than in all other economies (58%). It is important to note here that Kosovo* boasts the youngest population in the region.

Knowing the right people is significantly more important in Serbia (38%) and The Former Yugoslav Republic of Macedonia (35%). Hard work, as a predictor of success, is more important in Albania (31%) and Montenegro (33%).

The youngest category of respondents (31%) and those highly educated (31%) attribute success in life to good education, significantly more than the other groups. Working hard as a key to success is more important to the oldest segment of respondents (30%) and people who rate their social status as above average (31%), whereas those who rate their social status as below average largely believe that knowing the right people (33%) and belonging to a wealthy family (13%) is essential for success in life.

Figure 35: In your opinion which two assets are most important for finding a job today?

(All respondents - N=7026, maximum two answers, share of total, %)



Respondents are even more convinced of the importance of non-formal channels to securing employment with 50% prioritizing personal contacts as a key prerequisite and 37% highlighting the importance of a network of family and friends. Only about a third of the population in the SEE region believes that education is the most important consideration (32%) in securing employment.

Compared to 2015, there is an increase in the number of people who rate the network of contacts in high places as the most important factor in getting a job (2015: 33%; 2016: 37%). At the same time, the level of education (2015: 34%; 2016: 32%) and professional experience (2015: 22%; 2016: 20%) are less frequently noted as important in securing employment. Compared with last year, the biggest change was recorded with regard to the importance of contacts in high places in Kosovo* (2015: 18%; 2016: 26%) and in Albania (2015: 30%; 2016: 46%). The results of the survey are dissapointing as the labour market does not seem to be maturing but is rather going backwards.

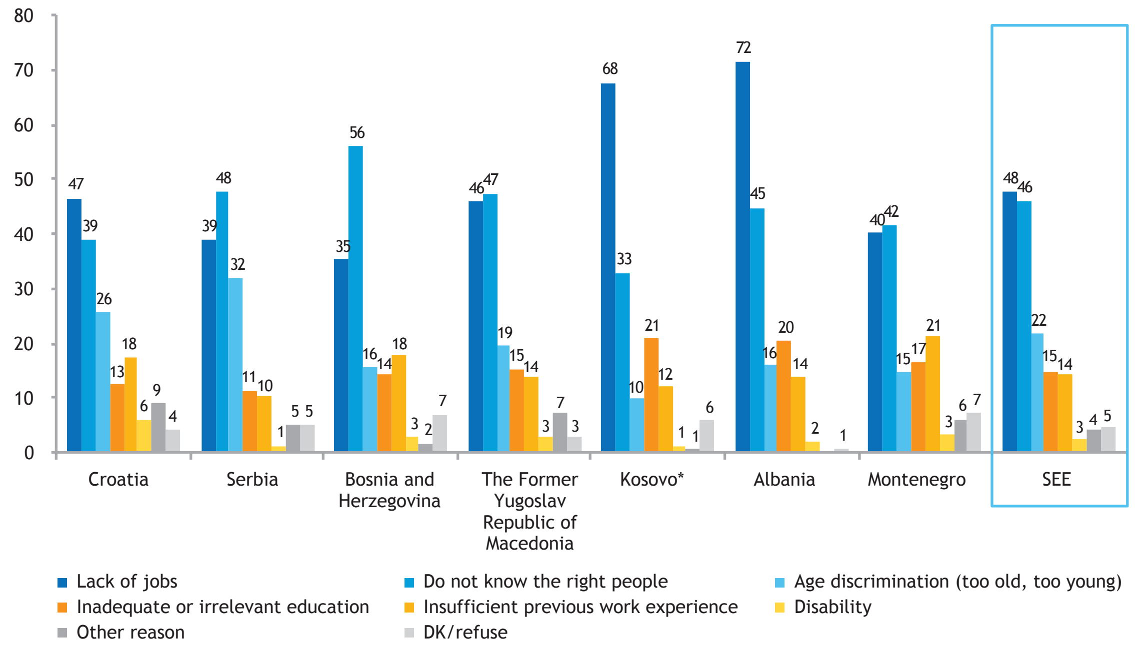
There are variations among individual economies in terms of importance of certain considerations in securing employment. Respondents in Kosovo* and in Albania consider professional experience (47% and 34% respectively) and education (57% and 49% respectively) as especially important making them the only two economies where education is considered the most important factor in getting a job.

At the same time, a large proportion of respondents in Albania (46%) and The Former Yugoslav Republic of Macedonia (34%) consider knowing people in high places critical for getting a job.

The highly educated and those who rate their social status as above average more often list professional experience as the most important factor in getting a job. Those who rate their social status as below average and the low-skilled, and those aged 46-60, more often cite the network of contacts in high places as the most important factor. At the same time, the youngest cohort (18-29 years old) are more likely to feel that language skills are a pre-requisite for getting a job.

Figure 36: What are the two main obstacles to those in your household who do not work, to get a good job?

(Households with at least one unemployed person, N=4208, %)



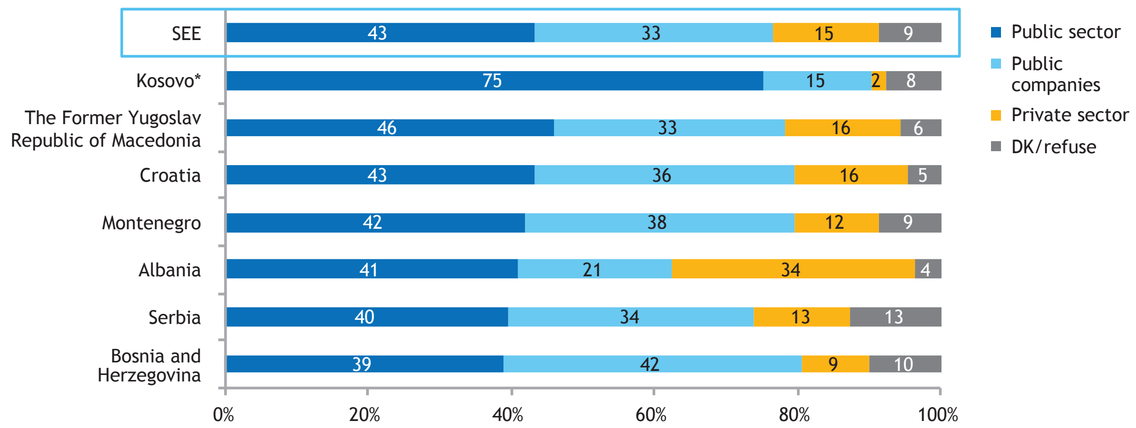
The most frequently cited obstacles to employment in the SEE region are the shortage of jobs on offer (48%) and not knowing the right people (46%). Age discrimination is ranked third (22%).

Albania and Kosovo* are home to the highest proportion of those bemoaning the lack of jobs on offer (Albania - 72%; Kosovo* - 68%). Bosnia and Herzegovina is unique in that the majority of respondents from this economy feel that not knowing the right people is the greatest obstacle to getting a job (56%), compared to unemployment in general (35%). Respondents in Serbia attribute, to a greater extent than others, their inability to get a job to age discrimination (32%).

Variations across demographic groups are notable with the youngest and middle-aged groups more likely than others to cite a lack of jobs in general as the main obstacle to employment (18-29: 54%; 30-45: 54%). At the same time, older respondents (46 and over) are more likely than others to attribute inability to get a job to age discrimination (46-60: 23%; 61+: 22%). Those who rate their social status as below average cite more often than others that the main problem is not knowing the right people (54%).

Figure 37: If you could choose, would you prefer to work in the public (public administration and public compnies) or private sector?

(All respondents - N=7026, share of total, %)



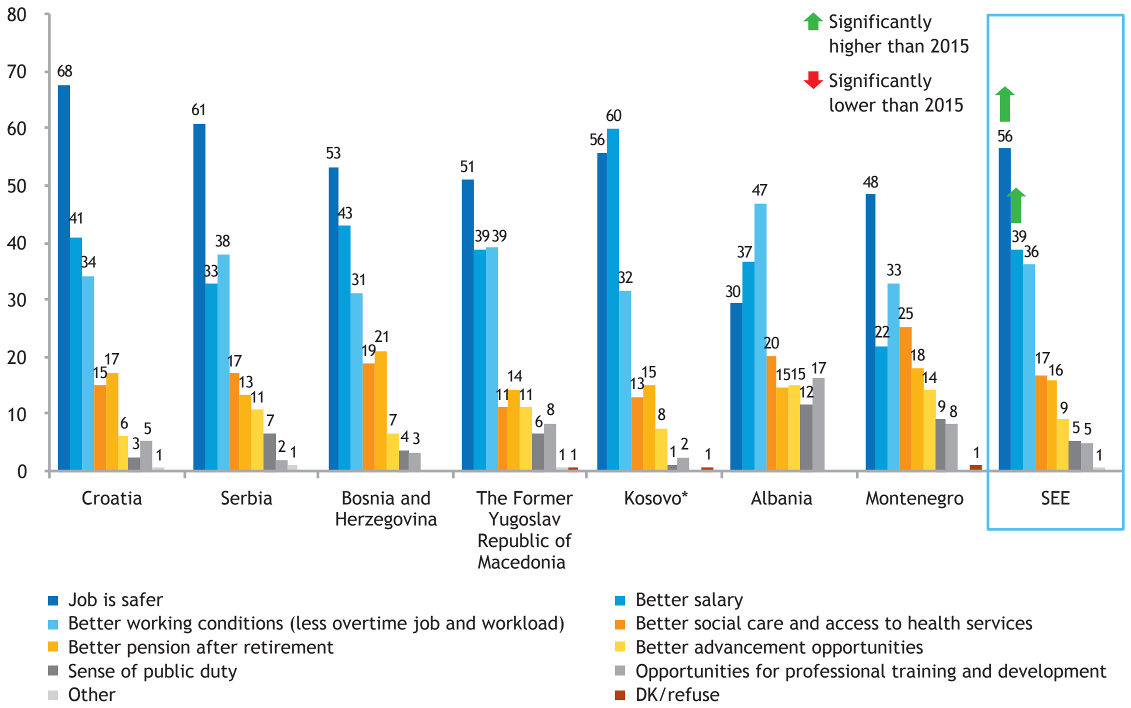
The vast majority (76%) of the population in the SEE region would prefer working in the public sector rather than for a private employer (15%). In terms of preference for individual public employers, government institutions, such as ministries, as well as service providers, such as schools and hospitals, are preferred to public companies.

Interestingly, the preferences of the SEE population do not correspond to the actual situation given that 69% are employed in the private sector, but only 15% wish to work there. On the other hand, 31% work in the public sector and as many as 76% would actually like to be employed in this very sector. This indicates that the perception of the „grass beeing greener on the other side" plays a factor in respondent preferences with public jobs commonly viewed as secure and not overly demanding.

There are significantly more people in Kosovo* (90%) who prefer working in the public sector (90%), particularly in public institutions (75%), while people from Albania (34%) prefer working in the private sector more than others. The private sector is more often chosen by the better-to-do who rate their social status as above average (34%). People from Bosnia and Herzegovina are the least interested in working in private companies and the fewest actually work there. This likely indicates a need for public sector reforms to address the number and staffing levels of public sector employers that exceed by far regional averages.

Figure 38: If you prefer to work in public sector, what is the main reason for that?

(Those who prefered work in public sector - N=5501, maximum two answers, %)



Why is it that 76% of people in the SEE region prefer working for a public employer? Job security is cited most frequently (56%), followed by better working conditions (no overtime) (36%) and better salary (39%). Compared with the 2015 survey, the number of those who believe that public sector jobs are more secure has increased (2015: 54%; 2016: 56%), as has the number of those who opt for public sector for better salary (2015:35%; 2016:39%). This is likely linked to a slow recovery that has put further strain on private sector employers to cut cost.

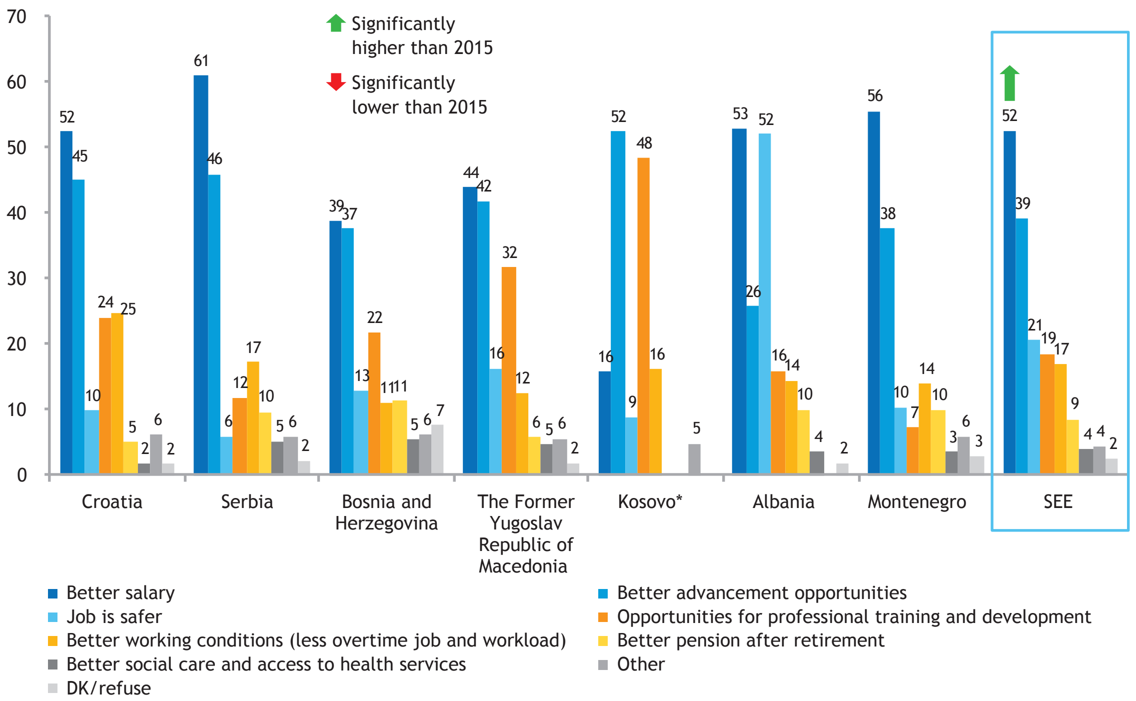
Kosovo* respondents choose the public sector for better salaries (60%), people from Bosnia and Herzegovina for better pension (21%) and Montenegrins for better social and healthcare benefits (25%).

Unlike in the other economies, respondents in Albania are more likely to opt for a public sector job out of a sense of public duty (12%), the potential for professional development (17%), better advancement opportunities (15%) and better working conditions (47%).

The youngest, highly educated and those who rate their social status as above average cite their preferance for public sector employment for better advancement and education opportunities. Those who rate their social status below average are more likely to choose the public sector out of job security and better benefits.

Figure 39: If you prefer to work in private sector, what is the main reason for that?

(Those who prefered work in private sector - N=1057, maximum two answers, %)



Better salaries are most often cited as the principle motivation for employment in the private sector (52%), along with better advancement opportunities (39%). Compared to the 2015 survey, the number of those who prefer working in the private sector for reasons of remuneration has increased (from 47% in 2015 to 52% in 2016). In Albania, respondents prioritize private sector employment due to better job security (52%) to a greater extent than the rest of the region. Individuals from Kosovo* are more likely to work in the private sector because of professional development opportunities (48%). In Kosovo*, better private sector salary is ranked in third place, below better advancement and professional development opportunities.

The youngest cohort (18-29) and the highly educated are more likely to work in the private sector because of better advancement and professional development opportunities.

Table 8: Reason for work in the private or public sector - comparison of the results at the SEE level

(Share of total, %)

Reasons for work in private or public sector	Public sector	Private sector
Job is safer	56	21
Better working conditions (less overtime job and workload)	36	17
Better salary	39	52
Better advancement opportunities	9	39
Better pension after retirement	16	9
Better social care and access to health services	17	4
Better education opportunities	5	19

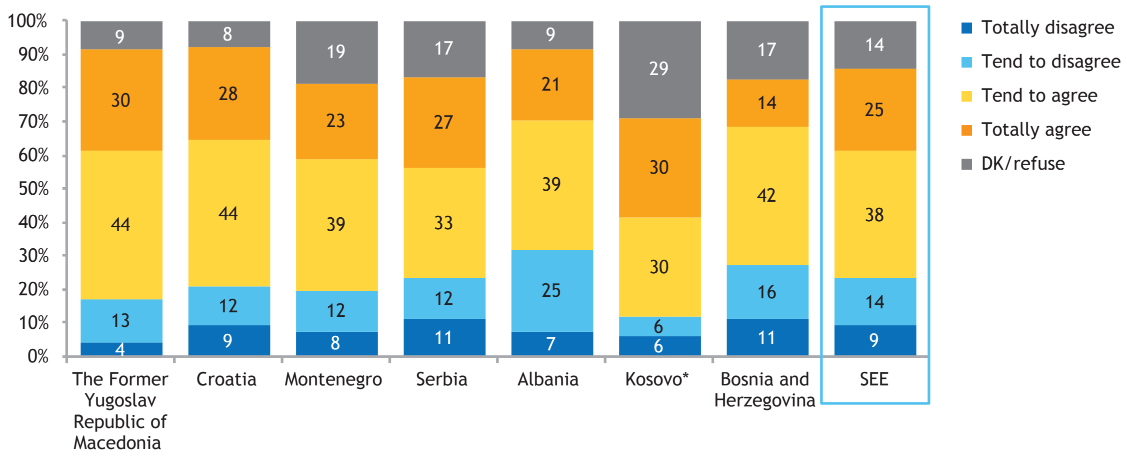
A review of public versus private sector employment preferences shows that job security and better working conditions, mainly manifested through no overtime, come up most frequently as the key selling points for public sector jobs.

On the other hand, respondents who prefer private sector jobs most commonly cite better advancement opportunities. Somewhat surprisingly, there is not a substantial difference in the perception of salaries between the two sectors with private employers viewed as only a little better in this regard.

Furthermore, the public sector is viewed favourably because of pension, social and healthcare benefits while private employers provide better opportunities for professional development.

Figure 40: Would you agree that the skills you learned in the education system meet the needs of your job?

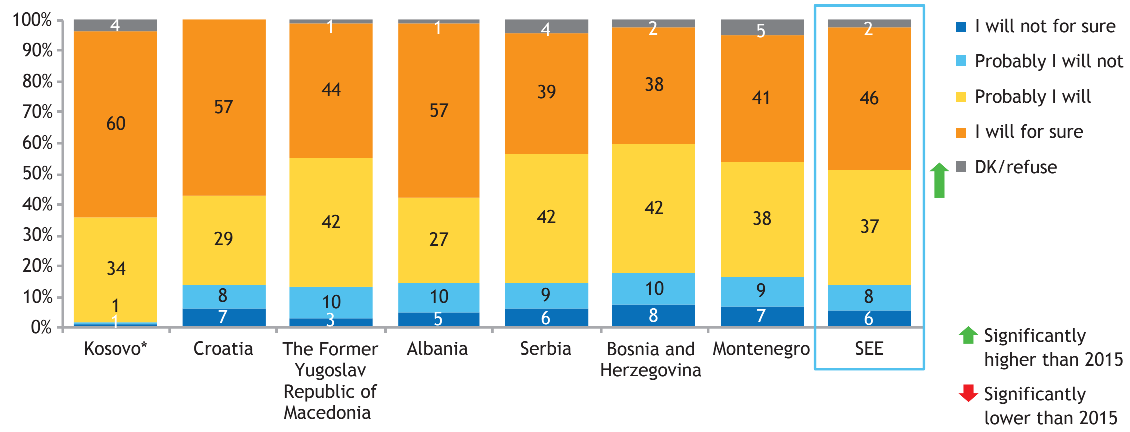
(All respondents - N=7026, share of total, %)



Most people (63%) agree that their education meets the needs of their job while only 23% disagree. Respondents in Kosovo* are significantly less likely to disagree (12%) while the highly educated are more likely than others to agree with this statement (80%).

Figure 41: Would you be ready to acquire additional qualifications to advance at work?

(Employeed people - N=3202, %)

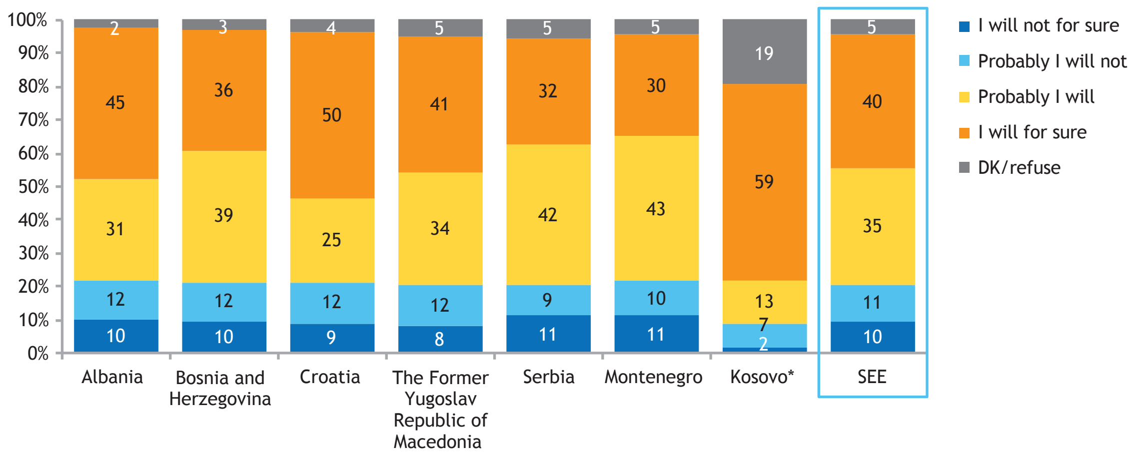


The vast majority of employed persons (83%) in the SEE region are ready to pursue additional training in order to advance at work. Compared with the 2015 survey, that number has increased (2015:81%; 2016: 83%).

Kosovo* has the largest number of people who are ready to pursue additional training (94%). The highly educated (91%) and the youngest (94%) are more likely to take on additional training opportunities to advance at work.

Figure 42: Would you be ready to acquire additional qualifications in order to get a job?

(Unemployed people and moonligting- N=1597, %)



Among the unemployed, 75% would pursue additional training in order to secure employment whereas 21% would not. This is somewhat concerning as it indicates a certain passivity by more than one fifth of prospective job seekers. Kosovo* boasts the fewest number of respondents who would not pursue additional training for the purposes of securing employment (9%).

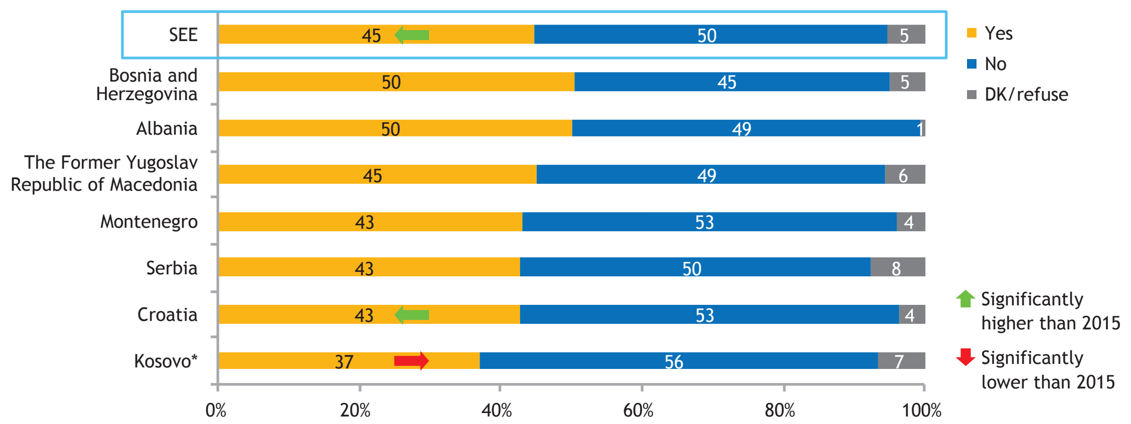
Attitudes Towards Mobility

Attitudes toward mobility in the region have changed very little, if for the better with more tolerance evident across most surveyed questions. Still, there are clear affinities when it comes to travel and work within the region. Interestingly, visitors from outside of the region are preferred to those from within the region.

At the same times, attitudes towards people from other economies in the region coming to work are more positive while attitudes towards refugees are less hostile than before. Still, overall, there is a persistent absence of tolerance towards different social and ethnic groups across the region. The feeling of not being welcome when travelling in the region has increased within some groups; this does not bode well for regional cooperation.

Figure 43: Would you consider leaving and working abroad?

(All respondents - N=7026, share of total, %)



Slightly less than half of the region's population (45%) have considered moving abroad. While there are differences between the economies in the region the numbers tend to be high across the board with Albania and Bosnia and Herzegovina top with 50% and Kosovo* bottom with 37%. It is noteworthy that the relatively low numbers for Kosovo* may have been influenced by the inherent difficulty in securing the necessary travel and work clearences abroad as EU visa liberalisation has yet to happen for this economy.

Compared to the 2015 survey, the number of those who are thinking of living abroad has slightly increased (2015:43%; 2016: 45%). With the exception of Kosovo*, however, where the number of those considering moving has decreased from 48% to 37%, there have been few notable changes.

Within the youngest cohort, 68% of people ages 18-29 would consider living abroad. Potential emigrants are fewer among the low-skilled respondents, who would likely struggle for work abroad (65% are not considering leaving); individuals who are well off in the economy in which they live (61% are not considering leaving); as well as older adults, over the age of 61 (81% would not consider leaving).

Table 9: Would you consider living and working in another place in the SEE region?

(All respondents - N=7026, share of total, %)

	Yes	No	DK/refuse
Bosnia and Herzegovina	22	70	8
Montenegro	17	75	8
The Former Yugoslav Republic of Macedonia	16	78	6
Albania	14	82	4
Kosovo*	12	73	15
Serbia	11	83	6
Croatia	7	92	1
SEE	13 ↓	81	6

↑ Significantly higher than 2015 ↓ Significantly lower than 2015

Table 10: If yes, where?

(Those who answer with yes - N=913, multiple answer,%)
Read the table in columns.

	Albania	Bosnia and Herzegovina	Kosovo*	The Former Yugoslav Republic of Macedonia	Montenegro	Serbia	Croatia
Albania		0	6	1	1	0	0
Bosnia and Herzegovina	1		0	1	1	2	3
Kosovo*	5	0		1	2	0	0
The Former Yugoslav Republic of Macedonia	3	0	1		1	1	1
Montenegro	3	2	3	3		6	1
Serbia	2	10	0	4	13		2
Croatia	9	13	7	11	4	4	

When it comes to living and working in another economy in the SEE region, there is a much smaller proportion of respondents who would consider making the move. Compared to 45% who would consider working and living abroad, only 13% would be willing to make the same move within the region. Among the group, Bosnia and Herzegovina boasts the highest number of would-be regional emigrants (22%). Apart from Croatia, which is a favourite regional destination for most respondents, respondents from Montenegro would most readily move to Serbia and vice-versa. Albania, along with Croatia, is the preferred option for respondents from Kosovo*. Compared to the 2015 survey, there are fewer people who would consider living in another SEE economy (down to 13% from 16% in 2015).

Table 11: Did you travel anywhere in the region in the past 12 months?

(All respondents - N=7026, share of total, %)

	Yes	No	DK/refuse
Kosovo*	70	29	1
Bosnia and Herzegovina	49	49	2
Montenegro	44	54	2
The Former Yugoslav Republic of Macedonia	39	59	2
Serbia	33	66	1
Croatia	30	69	0
Albania	29	70	2
SEE	38	61	1

Table 12: If yes, where?

(Those who travelled - N=2670, multiple answer,%)
Read the table in columns.

	Albania	Bosnia and Herzegovina	Kosovo*	The Former Yugoslav Republic of Macedonia	Montenegro	Serbia	Croatia
Albania		1	62	16	7	0	1
Bosnia and Herzegovina	2		1	1	14	12	24
Kosovo*	15	0		10	7	1	0
The Former Yugoslav Republic of Macedonia	8	1	11		3	4	1
Montenegro	13	13	17	9		20	3
Serbia	1	19	4	17	35		9
Croatia	6	32	3	7	9	6	

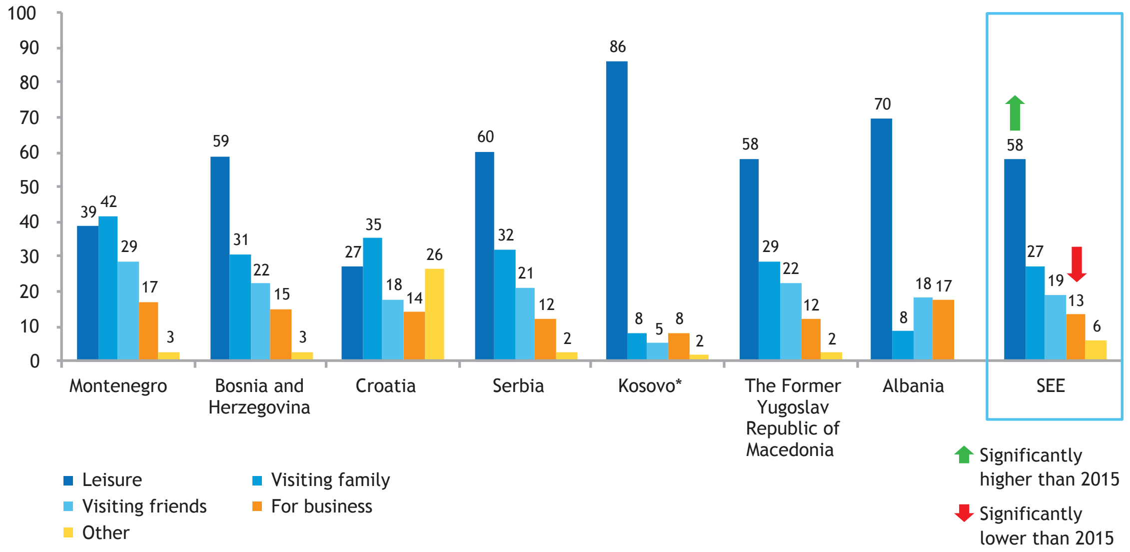
In the past 12 months, 38% of the SEE population has travelled within the region. People from Kosovo* have travelled the most (70%) and those from Croatia (30%) and Albania (29%) the least.

People from Albania mostly travelled to Kosovo* (15% of those who travelled), people from Bosnia and Herzegovina to Croatia (32%), people from Kosovo* (as many as 62%) travelled last year to Albania, people from Serbia to Montenegro (20%) and people from The Former Yugoslav Republic of Macedonia to Albania (16%) and Serbia (17%).

Croats most frequently visited Bosnia and Herzegovina (24%) and Montenegrins Serbia (35%), travelling mainly to visit family.

Figure 44: What was the purpose of your travel?

(Only those who traveled - N=2670, %; multiple answer)



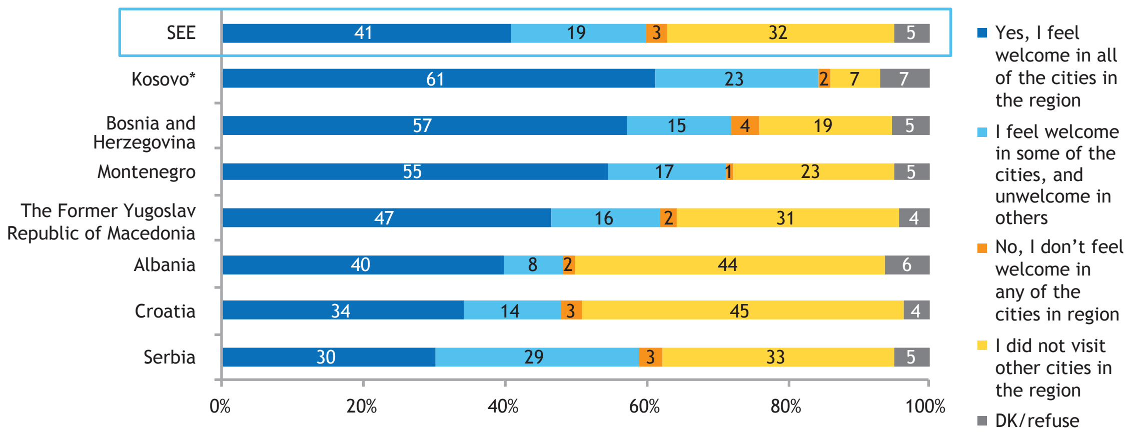
At regional level, people travelled mostly for leisure (58%), followed by visits to family and friends while traveling for business is ranked last (13%). Compared with 2015, people increasingly travelled for leisure (up to 58% from 51% in 2015) while there were fewer business trips (down to 13% from 16% in 2015)

Kosovo* (86%) and Albania (70%) had most regional leisure travellers while people from Montenegro visited friends and family more often than others (friends - 29%; family - 42%).

The youngest cohort (18-29) are more likely to travel for leisure (70%), the older visit family more frequently (39%) while the highly educated and those who rate their social status as above average are more likely to travel for business purposes (the highly educated: 16%; those who rate their social status as above average: 22%).

Figure 45: Do you feel welcome abroad, when traveling to other cities in SEE region either for business or leisure?

(All respondents - N=7026, share of total, %)

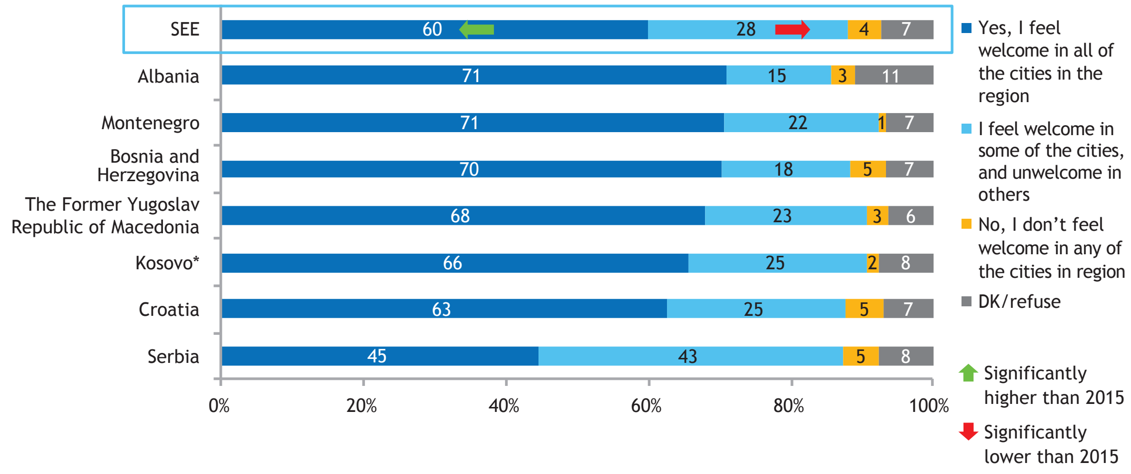


At regional level, 32% of people have not visited any other city in the region. These are mostly people from Albania (44%) and Croatia (45%). People from Kosovo* have been most likely to visit cities in the region (86%).

Older adults (42%), the low-skilled (49%) and those who rate their social status as below average (44%) visited cities in the region the least whereas the highly educated (58%) and those who rate their social status as above average (60%) were significantly more likely to feel welcome in all the cities they visited.

Figure 46: Do you feel welcome abroad, when traveling to other cities in SEE region either for business or leisure?

(Only those who traveled, N=5053,%)



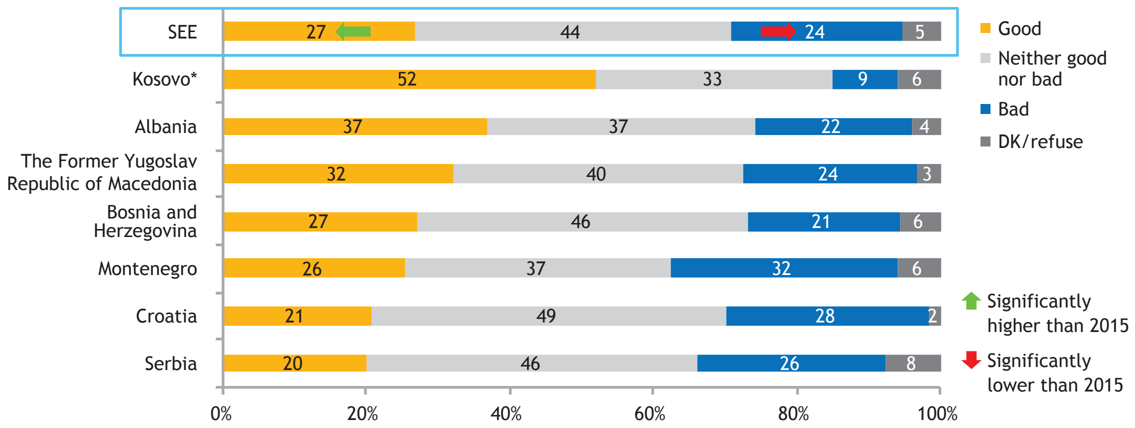
Among those who travelled, the majority felt welcome in any city (60%) whereas 28% felt welcome only in some cities. Only 4% did not feel welcome in any city in the region.

Compared to the 2015 survey, there was a growing number of those who felt welcome in all the cities they visited (2015: 48%; 2016: 60%) and the number of those who felt welcome only in some cities decreased (2015: 38%; 2016: 28%).

Serbia stands out with the largest number of people who felt welcome only in some cities in the SEE region (43%) and with the fewest number of those who felt welcome in all the cities they visited (45%).

Figure 47: 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=7002)



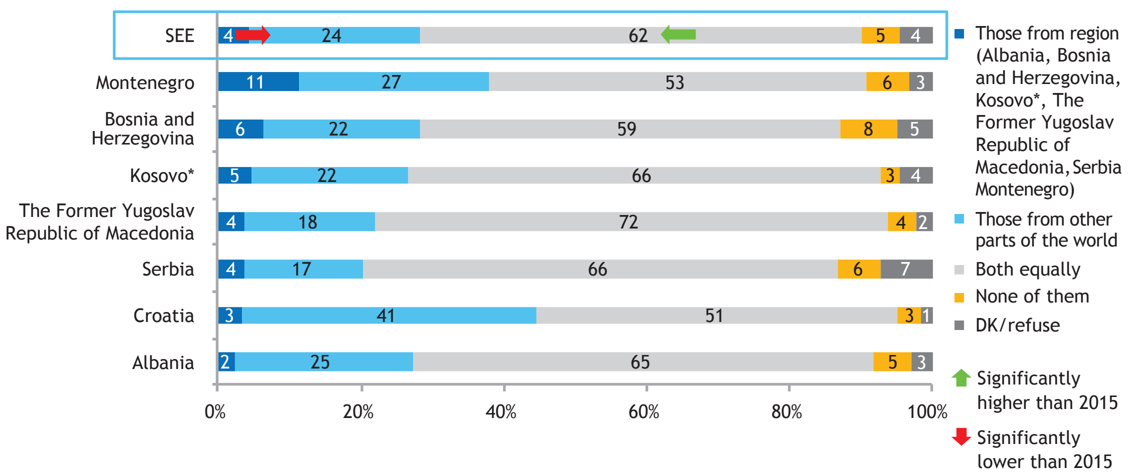
Most of the SEE population (44%) have a neutral attitude towards people coming into their economy from within the region; 24% think it is bad and 27% think it is good for their economy. In comparison with the last wave, there are more of those who think that the arrival of other people from the region is good (2015: 22%; 2016: 27%) and fewer of those who think it is bad (2015:31%; 2016: 24%).

People from Montenegro (32%) are significantly more opposed to people from the region coming and living in their economy whereas people from Kosovo* (52%) and Albania (37%) support it to a significantly greater extent.

Those who rate their social status as above average (42%), the highly educated (39%) and the youngest respondents (34%) are more likely to support arrivals of people from the region whereas those who rate their social status as below average are more likely to feel threatened by the arrival of people from other parts of the SEE region (33%).

Figure 48: Which tourists would you like to have more in your economy, those from the SEE region or from other parts of world?

(All respondents - N=7026, share of total, %)

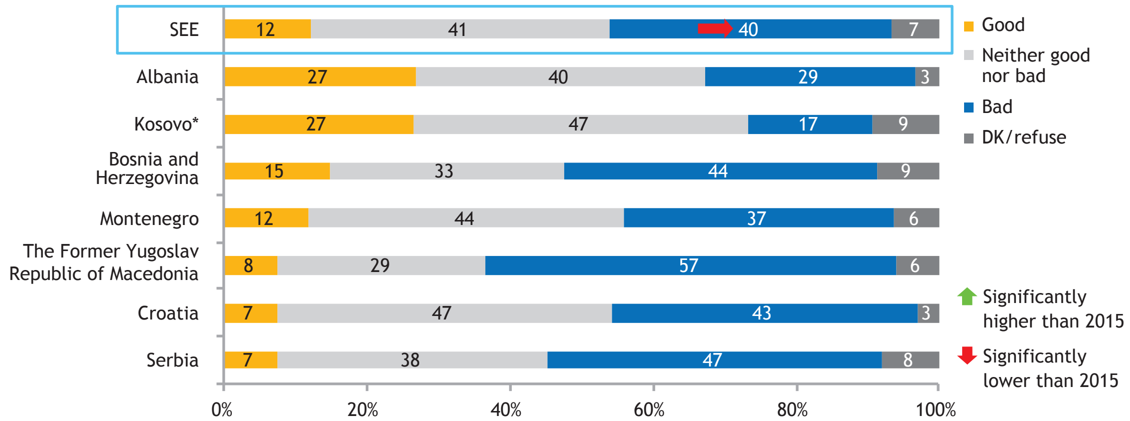


More than half of the SEE population (62%) equally accept tourists from the SEE region and those from other parts of the world. Tourists from outside of the region are preferred by 24% and only 4% prefer tourists from the SEE region. Compared with 2015, there are fewer people who prefer tourists from the region (down to 4% from 7% in 2015) and more people who equally accept all tourists regardless of where they come from (2015: 60%; 2016: 62%).

People from Croatia are significantly more likely to prefer tourists from other parts of the world (41%) while people from Montenegro, more than others, prefer tourists from the region (11%). The population of The Former Yugoslav Republic of Macedonia would like to have both types of tourists (72%).

Figure 49: What do you think about refugees coming to live and work in your city? Is it good or bad for your economy?

(All respondents - N=7026, share of total, %)



With regard to refugees, the most recent problem spotlighted in the region and beyond, an equal proportion of the population has a negative (40%) and neutral (41%) attitude towards them. Compared with 2015, when the problem of refugees was significantly more relevant, there has been a change in attitude towards them: the number of those who regard them as a threat to their economy has decreased (down to 40% from 47% in 2015).

The population of The Former Yugoslav Republic of Macedonia is the only economy where the majority of respondents are negative towards refugees (57%). All in all, with the exception of Kosovo*, there are more people who are negative with regards to refugees than those who are positive in all of the region's economies. Refugees enjoy the least support in Serbia and Croatia (7% for both).

People who rate their social status as above average (22%) and those highly educated (20%) are more likely to support refugees in their city.

Attitudes to Social Inclusion of Vulnarable Groups

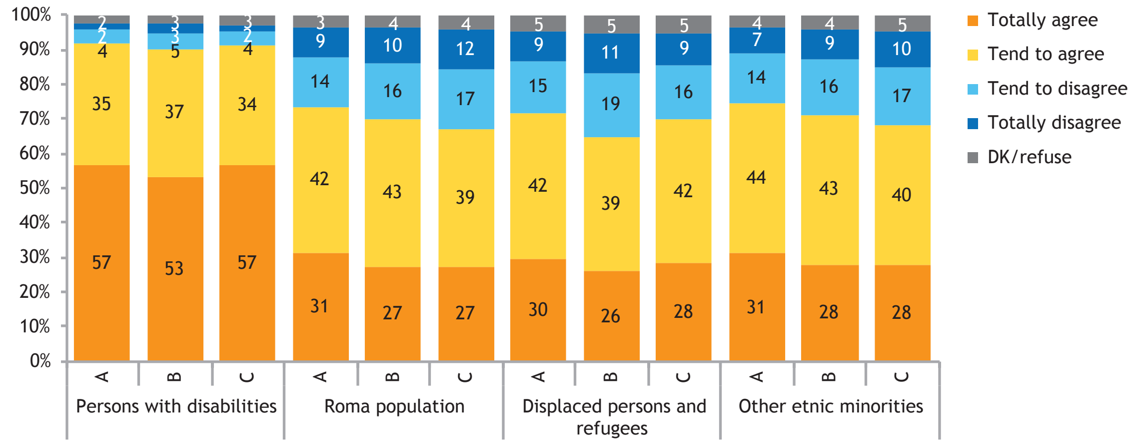
Attitudes towards people with disabilities are universally supportive, while Roma, other minorities, and refugees still invoke less than uniform empathy across the region.

Overall, inclusiveness as a concept is seen as good, but is resisted in concrete cases where it matters.

Figure 50: Do you agree with the following statements: The Government should provide affirmative measures-promote the opportunities for equal access to the groups listed below:

(All respondents - N=7026, share of total, %)

A - When applying for a secondary school or university
B - When applying for a public sector job
C - The Government should do more in order to ensure better housing conditions



In the part addressing vulnerabilities and social exclusion, attitudes on government action to affirm the rights of individual groups were examined. Respondents presented their standpoints in terms of agreement or disagreement with statements offered as part of the survey.

The questions were related to the government's agenda in terms of ensuring equal access to secondary schools or universities, public sector jobs as well as greater government involvement to ensure better housing conditions, in particular for persons with disabilities, Roma, displaced persons and refugees, as well as other ethnic minorities.

The respondents were overwhelmingly supportive of their governments' involvement when it comes to persons with disabilities. Roughly equal support was given to affirmative action in the realms of education, public employment and housing (ranging from 90% to 92%). As for the other three vulnerable groups under review (Roma, other minorities and refugees), they were afforded varying degrees of support across the region and across the sectors examined.

There are no demographic variations on these issues.

Table 13: People who agree with the statement that the Government should provide affirmative measures-promote the opportunities for equal access to the groups listed below:

(Those who totally agree and tend to agree, %)

A - When applying for a secondary school or university
B - When applying for a public sector job
C - The Government should do more in order to ensure better housing conditions

		Albania	Bosnia and Herzegovina	Kosovo*	The Former Yugoslav Republic of Macedonia	Montenegro	Serbia	Croatia
Persons with disabilities	A	93	89	98	84	90	91	95
	B	92	92	95	82	88	88	94
	C	93	94	98	86	88	88	94
Displaced persons and refugees	A	74	82	89	47	75	71	67
	B	68	81	79	43	71	64	54
	C	77	84	90	51	72	65	61
Roma population	A	80	82	83	71	79	66	73
	B	80	82	80	70	75	62	63
	C	78	83	85	69	76	55	57
Other ethnic minorities	A	79	84	82	73	81	66	76
	B	79	84	79	72	76	62	68
	C	76	84	84	70	78	56	63

Respondents from The Former Yugoslav Republic of Macedonia are least supportive of affirmative government action in favour of displaced persons and refugees (from 43% to 51% across the three topical areas). People from Serbia are less supportive than others of the Roma population (range of support from 55% to 66% across the three areas) and other ethnic minorities (56% to 66%).

Perceptions on Trade

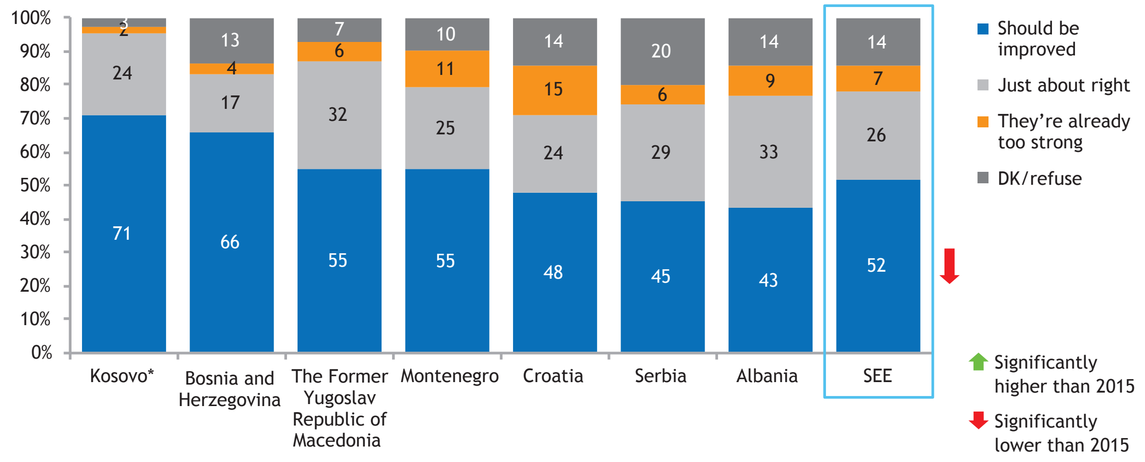
As borne out by previous Barometers, there is a strong home bias when it comes to consumption, but also when it comes to preferred trade policies. There is also belief in the competitiveness of domestic production as well as a lack of information about CEFTA. This is confirmed by the findings of the Business Barometer as well.

In general, improved regional trade is supported, though products from the EU are often considered superior to those coming from within the region.

As for infrastructure, investment in roads, which are used the most as means of transport, is still seen as a priority. There is tentative increased awareness of the importance of railways. Overall, and as noted in previous Barometers, satisfaction with existing infrastructure is higher than perhaps warranted by its condition. This is in part due to the slow pace of economic recovery so that decaying infrastructure is not yet a bottleneck for growth.

Figure 51: How would you describe commercial and trade links with SEE region?

(All respondents - N=7026, share of total, %)



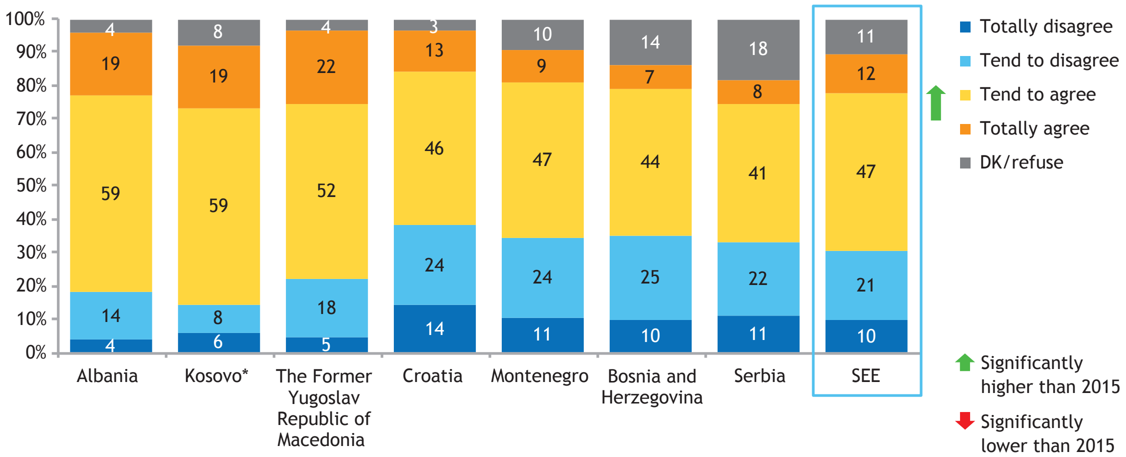
More than half of the SEE population (52%) feel that trade links between their respective economies and the SEE region should improve; 26% consider the links appropriate while 7% consider them excessive. In comparison with the last wave, there are fewer people who believe that trade links should be improved (down from 61% in 2014 to 52% in 2016).

Respodendents from Kosovo* (71%) and Bosnia and Herzegovina (66%) are more supportive of the need to further reinforce regional ties while their counterparts from The Former Yugoslav Republic of Macedonia view the links as appropriate most frequently (32%). Croatia, Montenegro and Albania boast the highest numbers of respondents who feel the ties are excessive as are (15%, 11% and 9% respectively).

Highly educated individuals (58%) and those who view their social status as average (56%) are more likely to support improvements in trade links. Those who rate their social status as above average (35%) are more likely than others to believe that the links are adequate as are.

Figure 52: Do you agree that entering of foreign companies in general in your market will improve the situation for consumers like you?

(All respondents - N=7026, scale from 1 to 4, share of total, %



At the level of the SEE region, 59% of respondents feel that the introduction of foreign companies will yield a positive outcome for consumers versus 31% who disagree. Compared to the 2015 survey, the number of individuals who see foreign companies entering the market as advantageous is on the rise (up to 59% from 56% in 2015).

Individuals from Albania (78%), Kosovo* (78%) and The Former Yugoslav Republic of Macedonia (74%) are significantly more likely to agree with this statement whereas people from Serbia are more sceptical (49%).

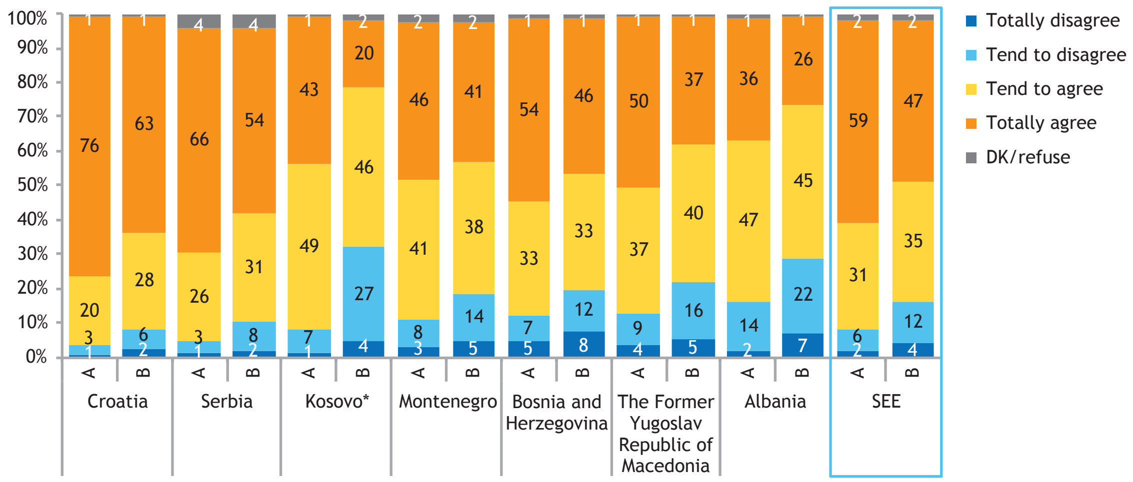
There are substantial variations across the various demographics: the younger segments of the respondent population as well as those who rate their social status as above average are significantly more likely to agree with this statement.

Figure 53: Do you agree with the following statements:

(All respondents - N=7026, scale from 1 to 4, share of total, %)

A - Products and goods of my economy can compete well with products and goods from other SEE economies.

B - Products and goods of my economy can compete well with products and goods from the EU



The vast majority of the SEE population exhibits a hefty dose of confidence in their own economy through the prevalently held belief that their products can compete with those from other SEE economies, as well as the EU.

There is more confidence, however, in relation to other SEE economies (90%) than in regards to products coming from the EU (82%).

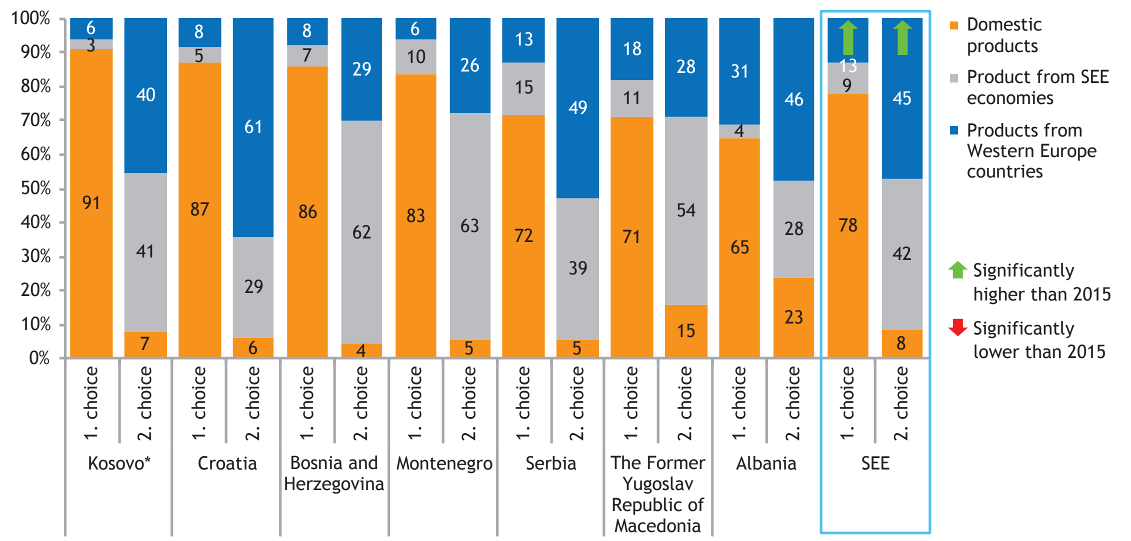
No significant variations were noted in the results as they compare to those of 2015.

Respondents from Serbia are significantly more confident in the competetiveness of their domestic products both in the SEE region (92%) and with the EU (85%).

Respondents in Albania were least likely to consider domestic products competitive in the SEE region (16% disagreed with the statement) while respondents in Kosovo* were least likely to consider domestic products competitive on the EU market (31% disagreed with the statement).

Figure 54: If you could choose a food or beverage from three different sources: domestic product, product from SEE region and product from Western Europe, which one would be your first choice and which would be second?

(All respondents - N=7026, share of total, %)



With regard to the choice of products from the food and beverage bracket, domestic products are preferred as first choice (78%) while there is an equal number of those who would opt for products from Western Europe (45%) and the SEE region (42%) as second choice.

Compared with the 2015 survey, there are more people who opt for products from Western Europe both as first and second choice (first choice: 2015: 42%; 2016: 45%, second choice: 2015: 10%; 2016: 13%).

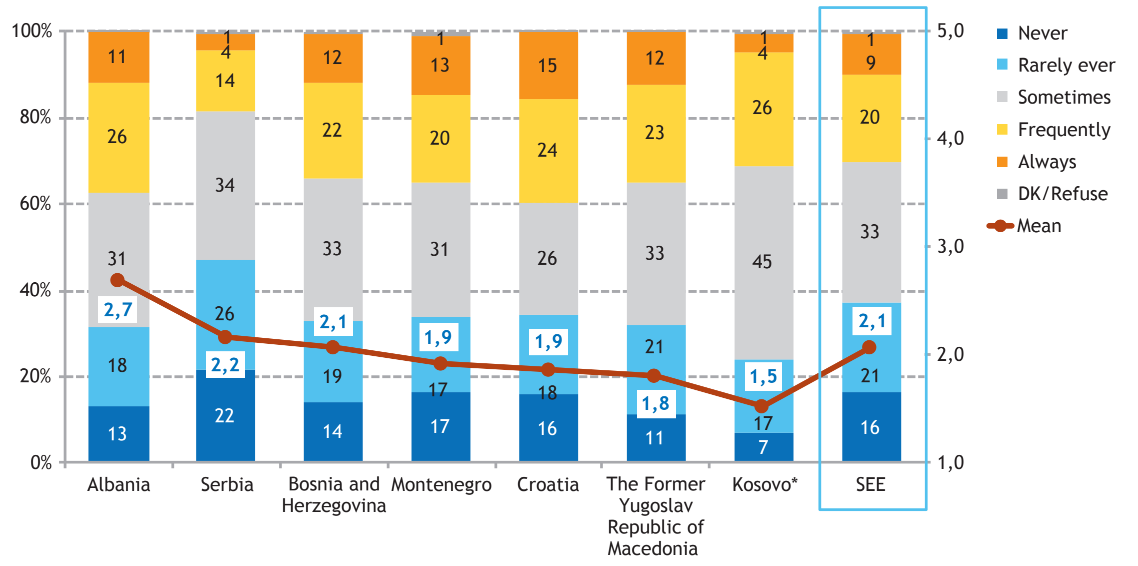
Domestic products are prevalently first choice across all economies with the exception of Albania where the preference lies with products from Western Europe (31%). People from Kosovo*, more often than others, choose domestic products (91%) and people from Serbia products from the SEE economies (15%).

As for second choice, respondents from Albania (23%) and The Former Yugoslav Republic of Macedonia (15%) are more likely than others to choose domestic products. People from Croatia are more likely to choose products from Western Europe (61%) as second choice, while people from Montenegro (63%) and Bosnia and Herzegovina (62%) will go for products from SEE economies.

With regard to first choice of products from the food and beverage bracket, the younger population (18-45 years old) and the highly educated are more likely to choose products from Western Europe while the oldest age group tends to choose domestic products. As for second choice, the youngest (18-29 years old) are more likely to prefer domestic products.

Figure 55: When purchasing products in supermarkets, how often do you look at the labels to see the country of origin?

(All respondents - N=7026, share of total, %)

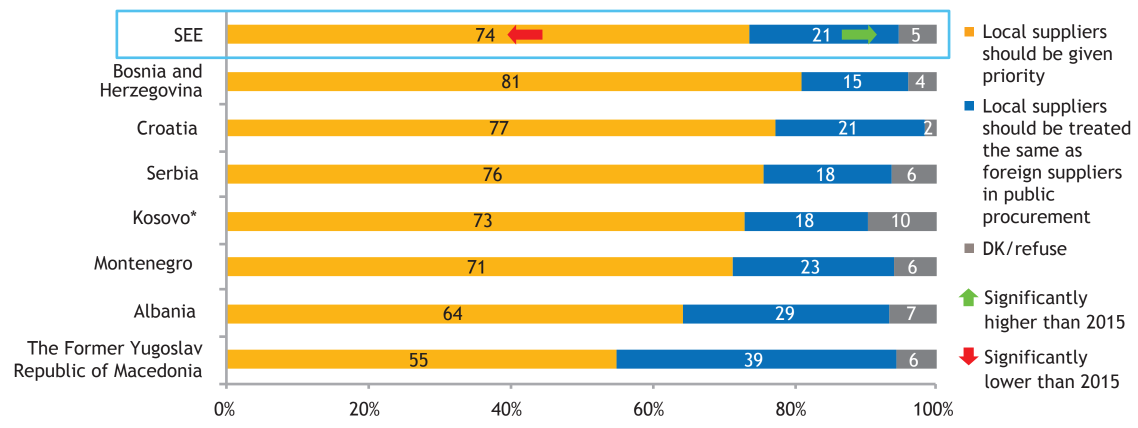


People in the SEE region tend to pay attention to the origin of the products they buy in supermarkets. In fact, 9% always look at the labels to check origin, 20% frequently do so and 33% sometimes, for a total of 62% of all respondents. 37% never or rarely check the label to establish origin.

Respondents from Albania are more likely to pay attention to the origin of products (mean 2.7), while people from Kosovo* do so the least (mean 1.5).

Figure 56: When procuring products and services, should your government give priority to local suppliers, or should they be treated the same as foreign suppliers (provided price and quality is equal)?

(All respondents - N=7026, share of total, %)



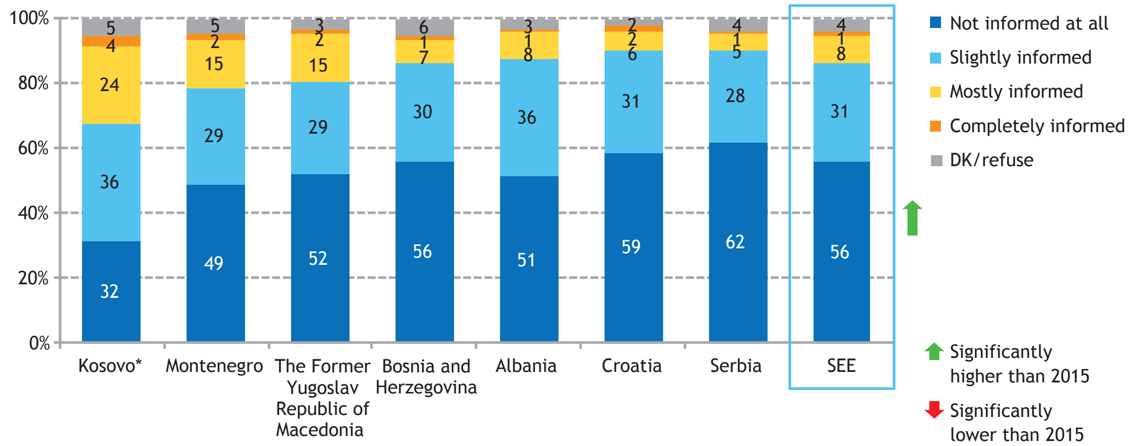
Most people in the SEE region (74%) believe that their government should prioritize local suppliers over foreign ones when procuring goods and services. Compared to the 2015 survey, there are fewer people who hold this belief (down from 77% in 2015) while an increase in those who feel all vendors should be treated equally regardless of origin has been recorded (up to 21% from 19% in 2015).

People from Bosnia and Herzegovina are significantly more likely to prioritize local suppliers (81%) while respondents from Albania and The Former Yugoslav Republic of Macedonia are more in favour of equittable treatment for all vendors (Albania: 29%; The Former Yugoslav Republic of Macedonia: 39%).

The oldest category of respondents (over 61) are more likely to support prioritization of local suppliers (74%).

Figure 57: To what extent do you think that you are informed about the regional free trade agreement (CEFTA 2006)?

(All respondents - N=7026, share of total, %)



More than half the people (56%) in the SEE region feel they are not informed at all about CEFTA while a third consider themselves slightly informed. Only 9% stated that they were completely or mostly informed. Compared to the 2015 survey, the number of those who consider themselves not informed at all has increased (up to 56% from 53% in 2015).

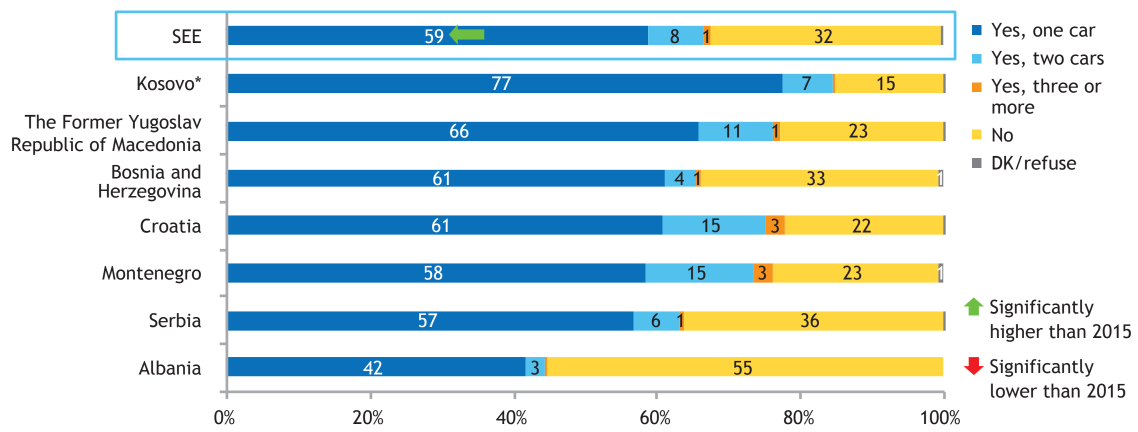
Kosovo* stands out with the highest number of informed individuals (28%). Highly educated people (21%) and those who rate their social status as above average (31%) consider themselves better informed.

Perceptions on Transport and Infrastructure

Overall satisfaction with infrastructure is better than with the economy in general or the governance framework. Roads continue to be used the most, which is why there is overwhelming interest in investment in their repair as well as in new roads. There is tentative increase of interest in railroads, a mode of transport previously neglected across the region.

Figure 58: Does your household own a car (please, do not count company car)?

(All respondents - N=7026, share of total, %)

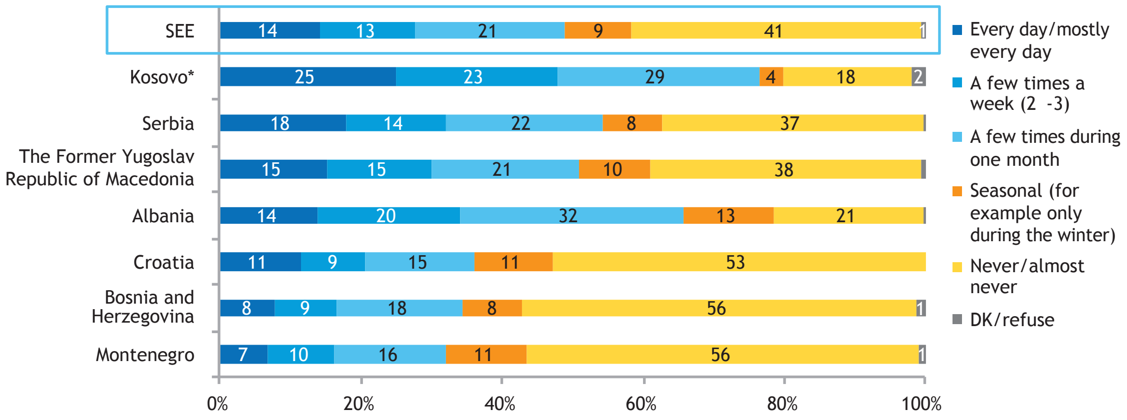


In the SEE region, 68% of households own at least one car whereas 32% do not. There are significantly more households in Albania that do not own a vehicle (55%), whereas a high proportion of households in Montenegro have two cars (15%). 77% of households in Kosovo* have one car. Compared with the 2015 survey, the number of households with one car has increased (up to 59% from 57% in 2015).

The better-off segments of the population, such as those highly educated (82%) and individuals who rate their social status as above average (88%) own at least one car. People in the age group of 30-45 years are also more likely to have a car (79%).

Figure 59: How often do you use public transportation?

(All respondents - N=7026, share of total, %)



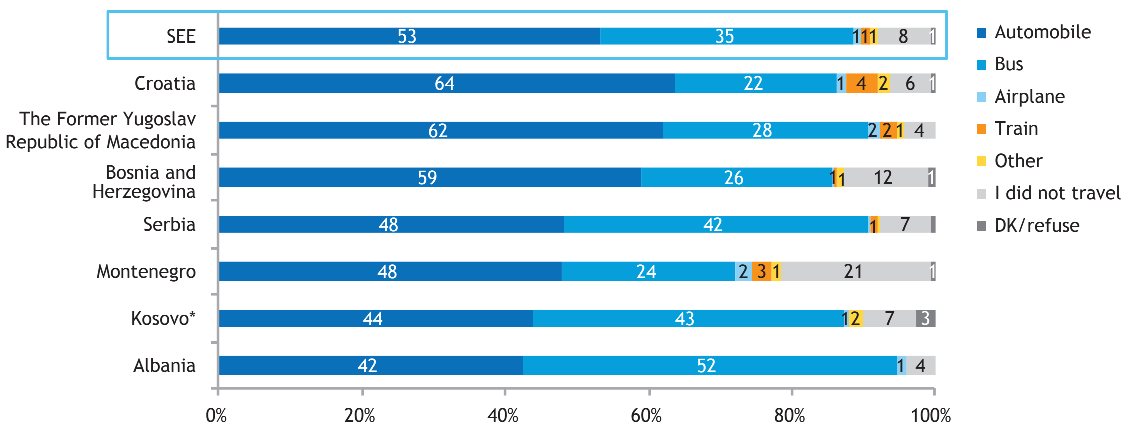
In the SEE region, 57% of the population use public transportation at least occasionally, 14% use it daily, 13% a few times a week, 21% a few times a month and 9% seasonally.

Respondents from Bosnia and Herzegovina (43%) and Montenegro (44%) are significantly less likely than others to use public transportation, while people from Albania (79%) and Kosovo* (81%) use it more often. Public transportation is used on a daily basis mostly in Kosovo* (25%) and least in Montenegro (7%) and Bosnia and Herzegovina (8%).

The youngest respondents, in the 18-29 age bracket, are more likely to use public transportation on a daily basis or a few times a week (28% use it on a daily basis, 18% a few times a week) whereas half of those who rate their social status as above average never use it.

Figure 60: Which mode of transport did you most often use when travelling outside of your place of residence in the past 12 months?

(All respondents - N=7026, share of total, %)



Of all the means of transport, people in the SEE region mostly travel by automobile (53%) and the bus (35%) when leaving their place of residence. Airplane was used by only 1% of the population. In the past 12 months, 8% of people did not travel at all outside their place of residence.

Compared with the 2015 survey, no significant variations were noted in the results.

Most respondents in Albania travelled by bus (52%) while people aged 30-45 years used cars as a means of transport significantly more often than others (63%), along with those highly educated (61%) and people who rate their social status as above average (71%); the latter group also flew more frequently (6%). The youngest group (18-29 years old) were more likely than others to travel by bus (44%) as well as those low-skilled (43%) and individuals who rate their social status as below average (44%).

Figure 61: How will you estimate the quality of transport infrastructure and connections within your economy?

(All respondents - N=7026, scale from 1 to 5 where 1 means very poor and 5 excellent, share of total, %)

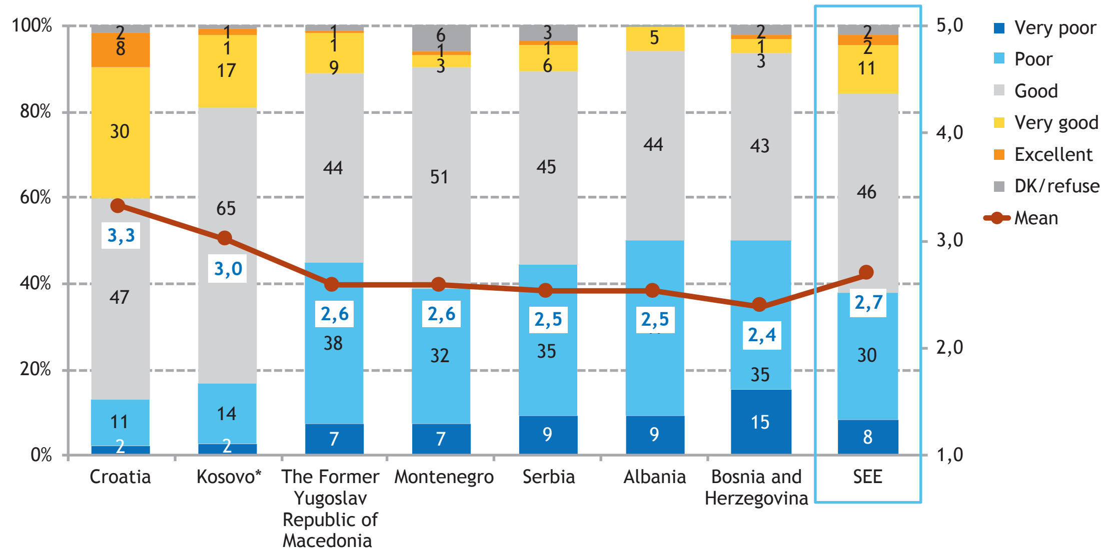
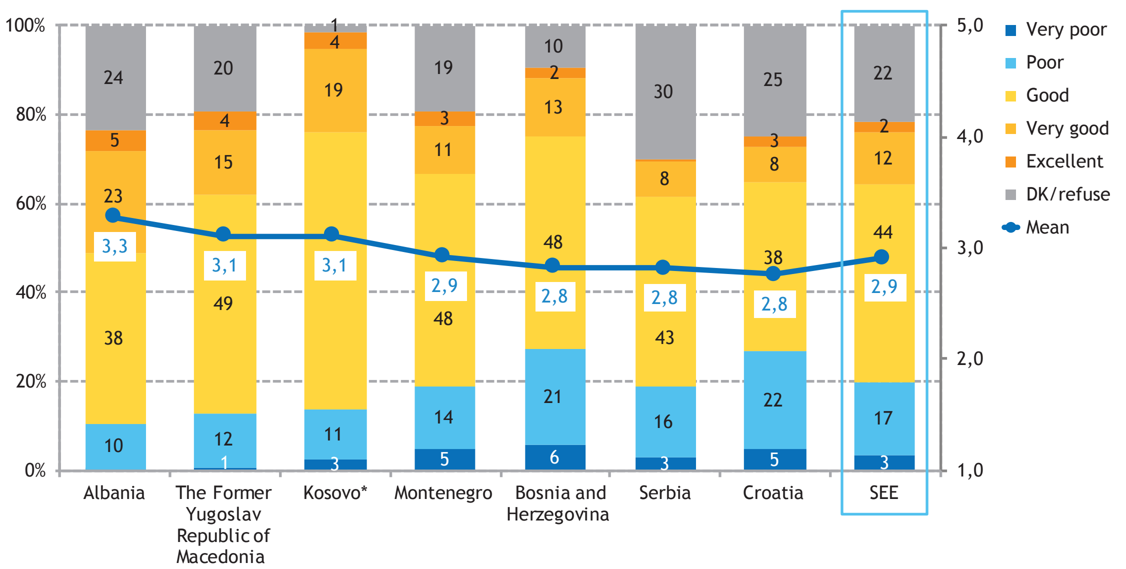


Figure 62: How will you estimate the quality of transport infrastructure and connections within SEE region?

(All respondents - N=7026, scale from 1 to 5 where 1 means very poor and 5 excellent, share of total, %)



Respondents were asked to appraise the quality of transport in their economy and within the SEE region on a scale of 1 to 5. The findings indicate that the quality of transport was assessed as better for the region (mean 2.8) than for the respondents' own economy (mean 2.7).

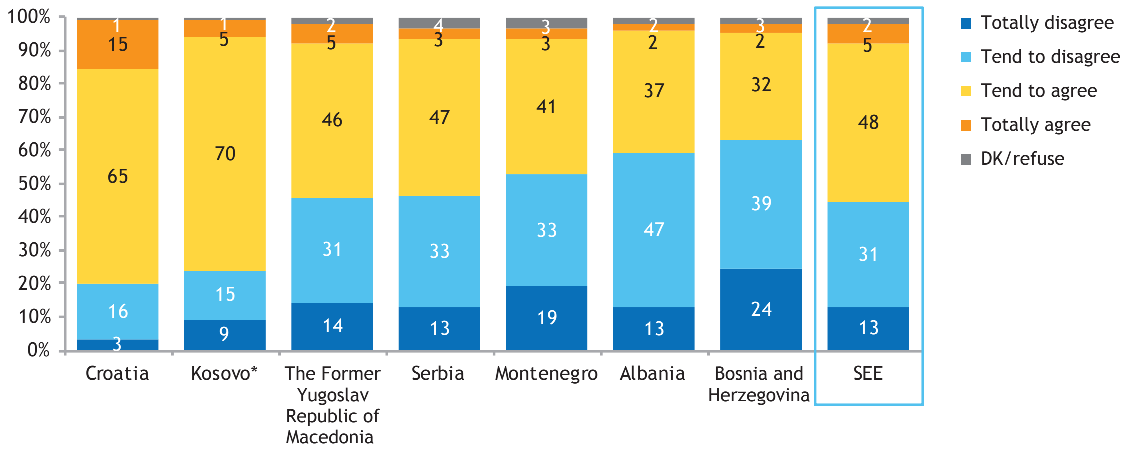
However, the differences across the economies are telling and the discrepancy in perception between regional and individual economy transport infrastructure can largely be attributed to an overwhelmingly positive assessment by Croatian respondents of their own economy (mean 3.3) versus the regional mean of 2.7. Albania stands at the other end of the spectrum where own transport infrastructure is assessed with a 2.5 versus that of the region appraised at a level of 3.3.

Respondents from Bosnia and Herzegovina assessed their transport infrastructure with a mean of 2.4, the lowest in the region.

Compared to the results of the 2015 survey, no significant variations have been observed across the demographic groups in terms of the quality of transport.

Figure 63: Would you agree that travelling by road in your economy is safe?

(All respondents - N=7026,share of total, %)

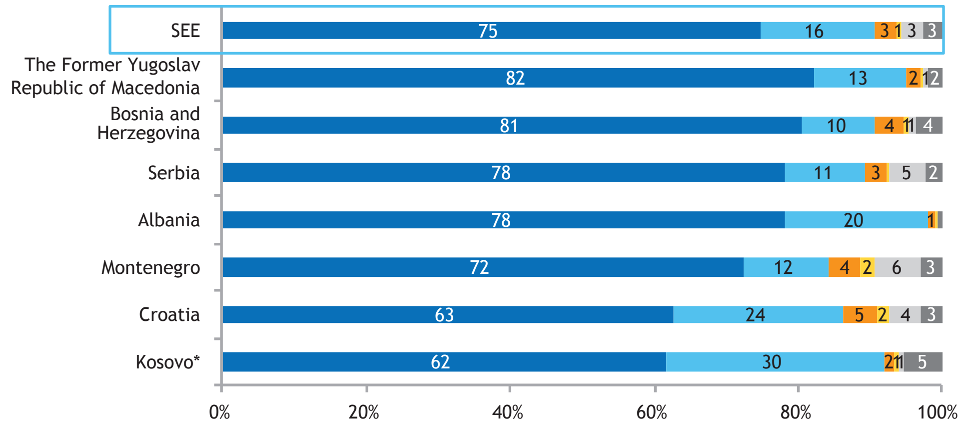


At the level of the SEE region, there are more people who think that travelling by road in their own economies is safe (53%) than those who don't (44%). A significantly higher number of those who agree with this statement are from Croatia (80%) and Kosovo* (75%). Bosnia and Herzegovina has the largest number of those who disagree with this statement (63%). In addition to Bosnia and Herzegovina, the number of respondents from Albania and Montenegro who believe that travelling by road in their own economies is not safe outnumbers those that do.

There are no differences from the results of the 2015 survey or across the demographic groups.

Figure 64: In your opinion, which passenger transport mode improvements would have the highest beneficial impact on your traveling?

(All respondents - N=7026, share of total, %; multiple answer)



Taking into account survey results for the region, road improvements are seen as having the most beneficial impact on travelling (75%). This is as expected considering that road transport is the most common mode of travelling while a large proportion of respondents find the roads in the region to be poor and unsafe. 16% of the population in the SEE region believe that improved railroads, as a mode of passenger transport, would have the greatest positive impact on their travel.

Compared with the 2015 survey, no significant differences were noted in the results.

In terms of intra-regional variations, Kosovo* (30%) has significantly more people who believe that improvement in rail transport would have the most beneficial impact on their own travel. People from The Former Yugoslav Republic of Macedonia are significantly more likely to see road improvements as most beneficial to their travel (82%).

Those highly educated (4%), persons who rate their social status as above average (8%) and the younger population (18-45 years old - 5%/4%) see improvement in air travel as most beneficial.

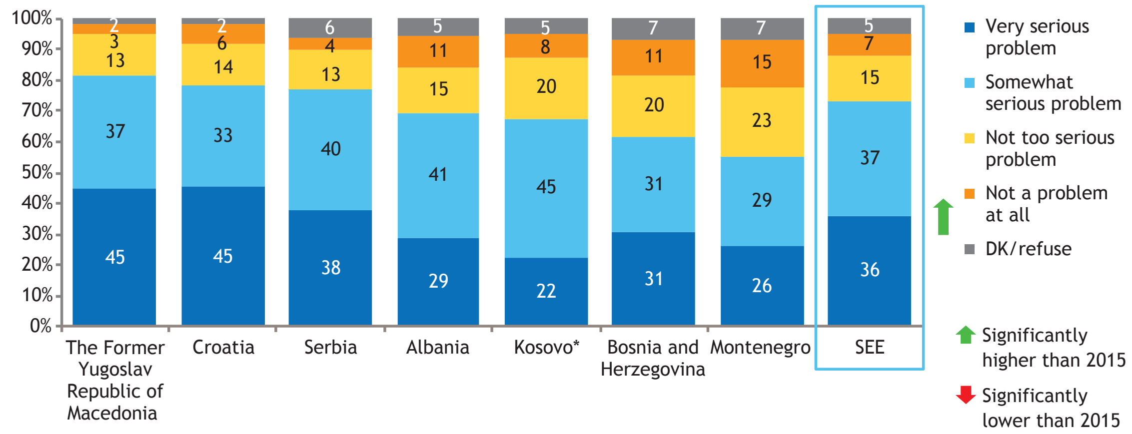
Attitudes Towards Climate Change and Energy

There is a growing awareness of climate change, of the need to protect the environment, and the importance of cutting down on energy consumption. In addition, food safety is highlighted as a concern.

These attitudes, however commendable, are at odds with reality and behaviour, influenced primarily by economic considerations. Respondents are acutely aware of what is needed but actual behaviour, at least as revealed by relevant statistical data, differs from desired behaviour, as described here.

Figure 65: Is Climate change a problem?

(All respondents - N=7026, share of total, %)

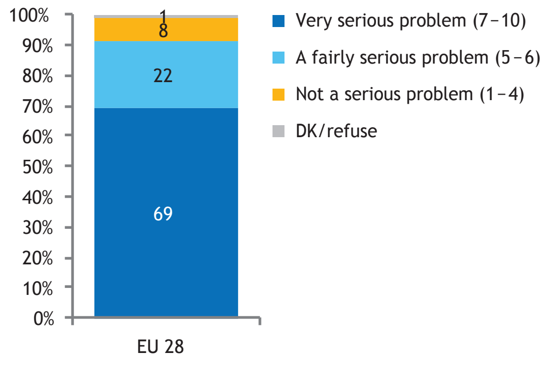


Most people in the SEE region perceive climate change as a problem (73%), with 36% viewing it as a very serious problem and 37% as a somewhat serious problem (37%). 22% do not consider climate change as a serious problem. Compared to the 2015 survey, there are more people who see climate change as a problem (up to 73% from 70% in 2015).

Montenegro boasts the highest proportion of people who do not see climate change as a problem.

Figure 66: How serious a problem do you think climate change is at the moment?

(Scale from 1 to 10, with '1' meaning it is "not at all a serious problem" and '10' meaning it is "an extremely serious problem")[5]



Source: Climate Change, Special Eurobarometer 435, EC, May-June 2015.

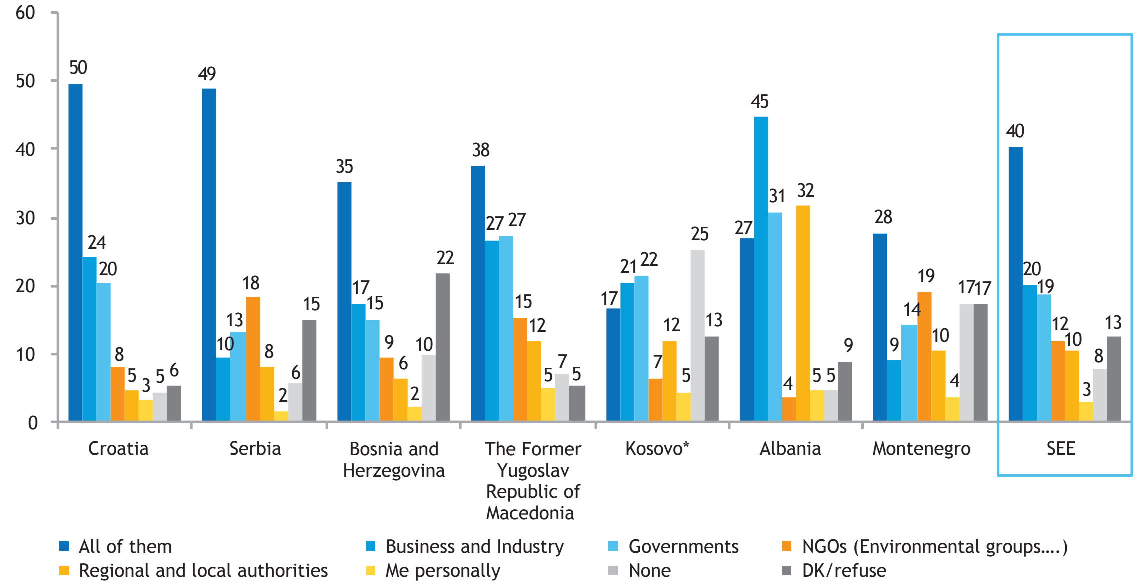
Special Eurobarometer on Climate Change, May-June 2015, includes a question on the importance of climate change. Although a different scale was used to the one in the Balkans Barometer, the difference in the degree of importance is evident. The findings indicate that climate change is a very serious problem for a larger number of people in the EU compared to their counterparts in the SEE region (SEE: 36%, EU: 69%). Among the 28 EU member states, only 8% do not perceive climate change as a serious problem compared to 22% in the SEE region. This discrepancy likely mirrors the difference in standard of living and the pressing nature of many other concerns within the SEE community as compared to the EU respondents. Also, the awareness of climate change, and its impact on societies, has been growing for some time in the EU before the issue was first popularised in the SEE region. Consequently, without being faced with subsistence concerns, EU respondents may perceive climate change as a more serious problem compared to the people in the SEE region who have other, more direct and pressing priorities in their daily lives.

Public debates on climate change are widespread in the EU, which is not the case in the SEE. In addition, the agendas of governments and parliaments in the EU include mitigation measures that have an impact on the quality and cost of life, unlike in the SEE. There is actually a large proportion, more than a third, of those who see climate change as an important issue in the SEE. This is probably the result of fairly significant climate impacts on economic trends, which are bigger in the SEE than in the EU, for example, when it comes to flooding and agricultural production in general.

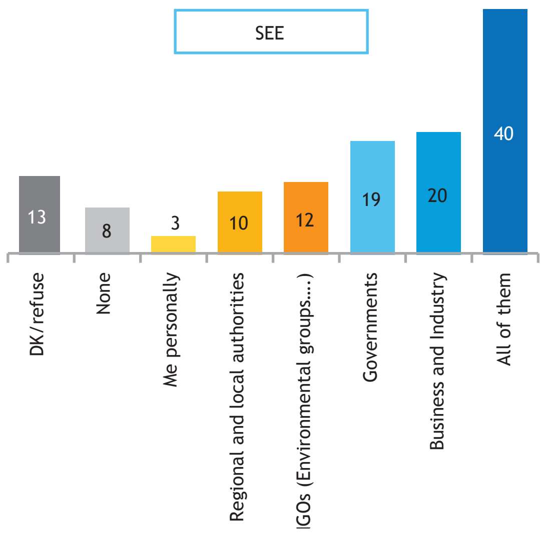
[5] European Commission: Special Eurobarometer 435, Climate change, May-June 2015

Figure 67: In your opinion, who within your economy is responsible for tackling climate change? (NEW QUESTION)

(All respondents - N=7026, share of total, %)



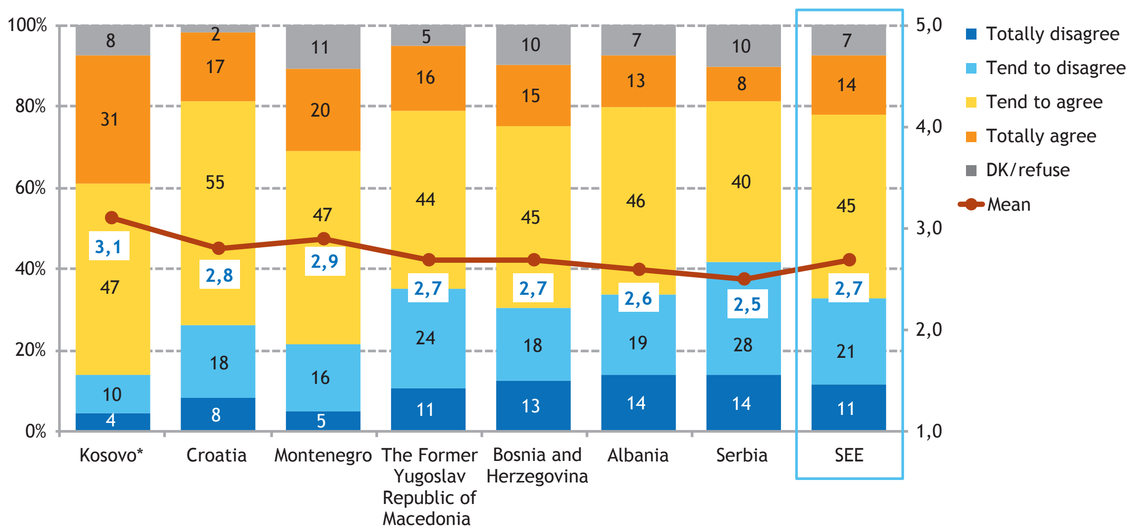
Most of the SEE population (40%) believe that the responsibility for tackling climate change lies with all the surveyed stakeholders (industry, government, NGOs, regional and local authorities, individuals). About 20% believe that business community, industry and governments bear the greatest responsibility.



Respondents in Albania and The Former Yugoslav Republic of Macedonia are likely to hold the government primarily responsible for climate change mitigation, along with business and industry (in Albania) while people in Montenegro are more likely than others to hold NGOs to task. Respondents in Serbia overwhelmingly believe that all institutions together are responsible for tackling climate change. There are no significant variations across the demographic groups.

Figure 68: Do you agree with the following satement: I am ready to buy environmentally friendly products even if they cost a little bit more.

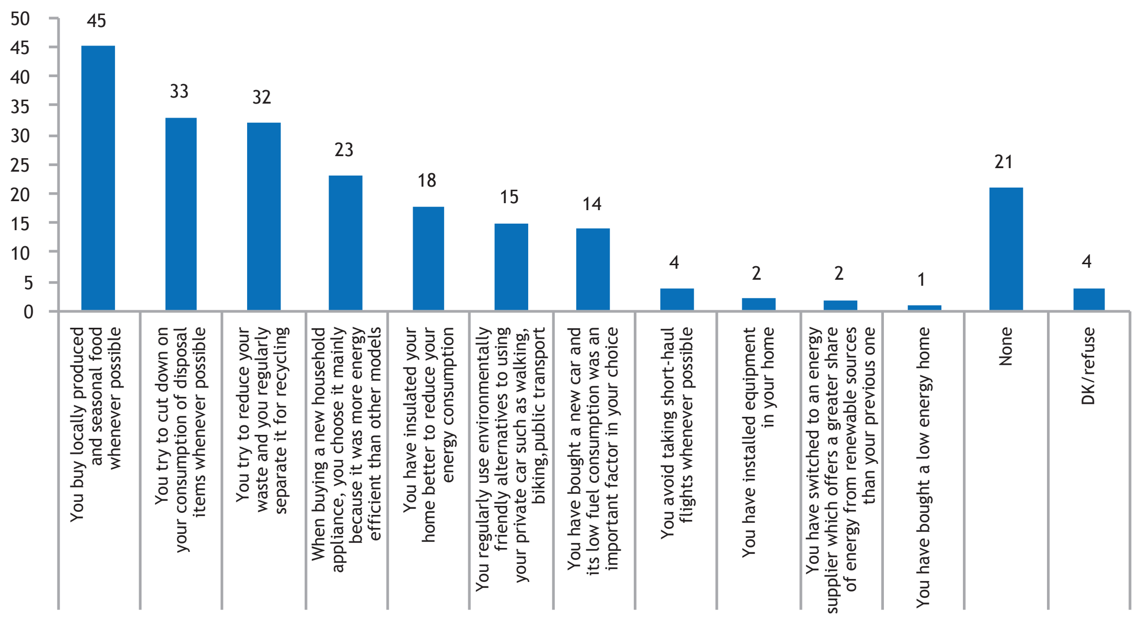
(All respondents - N=7026, share of total, %)



Slightly more than half the people (59%) in the SEE region are ready to buy environmentally friendly products even if they are more expensive. Such intent is more pronounced among the populations of Kosovo* (78%), Croatia (72%) and Montenegro (67%). Highly educated people (73%) are significantly more likely than others to agree with this statement.

Figure 69: Which of the following actions have you taken, if any? (SEE region) (NEW QUESTION)

(All respondents - N=7026, multiple answers, share of total, %)



Of all the mitigation actions on offer, the SEE population mostly buy locally produced and seasonal food whenever possible (45%). Among other actions related to environmental protection, respondents most often try to reduce the consumption of disposable items such as plastic bags whenever possible (33%) or reduce the amount of waste by regularly separating it for recycling (32%). Still, some 21% of the SEE population have not taken any of the listed actions.

Table 14 : Which of the following actions have you taken, if any? (by economies)(NEW QUESTION)

(All respondents - N=7026, multiple answers, share of total, %)

	Albania	Bosnia and Herzegovina	Croatia	Kosovo*	The Former Yugoslav Republic of Macedonia	Montenegro	Serbia
Try to reduce my waste and I regularly separate it for recycling	11	24	66	39	31	19	22
Try to cut down on my consumption of disposal items whenever possible	22	29	56	35	24	27	27
I buy locally produced and seasonal food whenever possible	50	31	62	31	35	41	45
When buying a new household appliance, I choose it mainly because it was more energy efficient than other models	31	8	43	35	26	23	15
I regularly use environmentally friendly alternatives to using my private car such as walking, biking, taking public transport or car-sharing	9	7	33	17	13	10	12
I have insulated my home better to reduce my energy consumption	10	12	26	21	23	15	17
I have bought a new car and its low fuel consumption was an important factor in my choice	7	8	28	12	13	15	12
I avoid taking short-haul flights whenever possible	3	1	12	3	5	2	2
I have switched to an energy supplier which offers a greater share of energy from renewable sources than my previous one	0	0	4	3	6	0	0
I have installed equipment in my home (for example solar panels to generate renewable electricity)	3	0	1	3	13	1	0
I have bought a low energy home	1	0	1	0	5	0	0
None	25	30	6	8	17	22	27

Comparing individual economies, it is evident that Croatia is most attentive to environmental protection with more than half of its population recycling waste, avoiding the use of disposable items such as plastic bags and the like. The largest number of those who have not taken any of the listed actions are found in Bosnia and Herzegovina (30%) and Serbia (27%).

The highly educated are significantly more likely to take all of these actions. People who rate their social status as above average are notably more likely to pay attention to fuel consumption when purchasing a new car and more often avoid taking short-haul flights whenever possible. The youngest cohort (18-29 years old), more often than others, use a bicycle, walk or use public transport, instead of driving their car, which is connected to their lifestyle.

Perceptions on Public Institutions and Services

CONFIDENCE IN AND PERCEPTIONS ON INDEPENDENCE OF PUBLIC INSTITUTIONS

Overall, there is major dissatisfaction with government performance in terms of transparency, responsiveness, control, and impartiality.

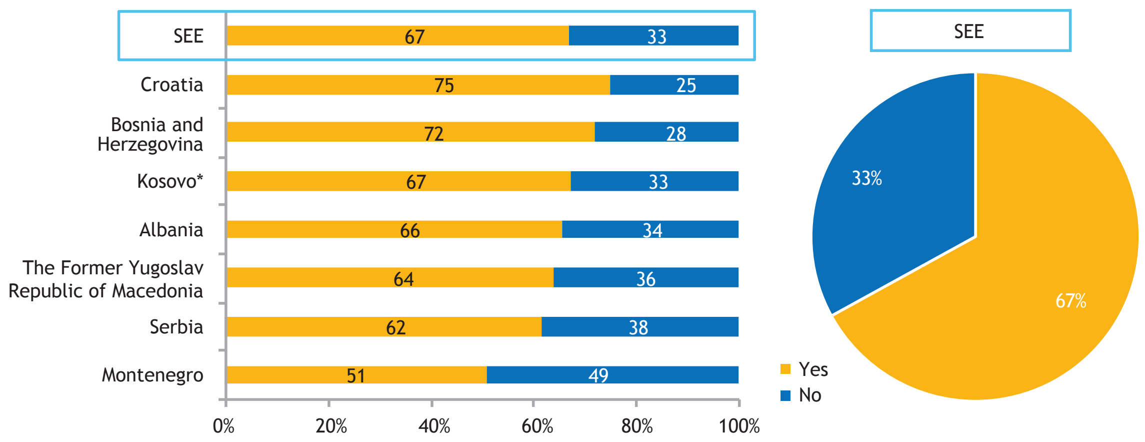
Larger economies tend to fare worse than the smaller ones. Kosovo* is still riding the wave self-government, so satisfaction is generally higher although not necessarily linked to performance. The most worrisome aspect is low confidence in the rule of law across the region.

In addition, the balance of power between the pillars of government is heavily tilted towards the executive and at the expense of other branches. There is a widespread belief that the media has largely been captured by the government, and its executive branch in particular.

In general, citizens feel they are not getting their money's worth when it comes to government performance and public service delivery.

Figure 70: Have you been in contact with public services in the last year?(NEW QUESTION)

(All respondents - N=7026, share of total, %)

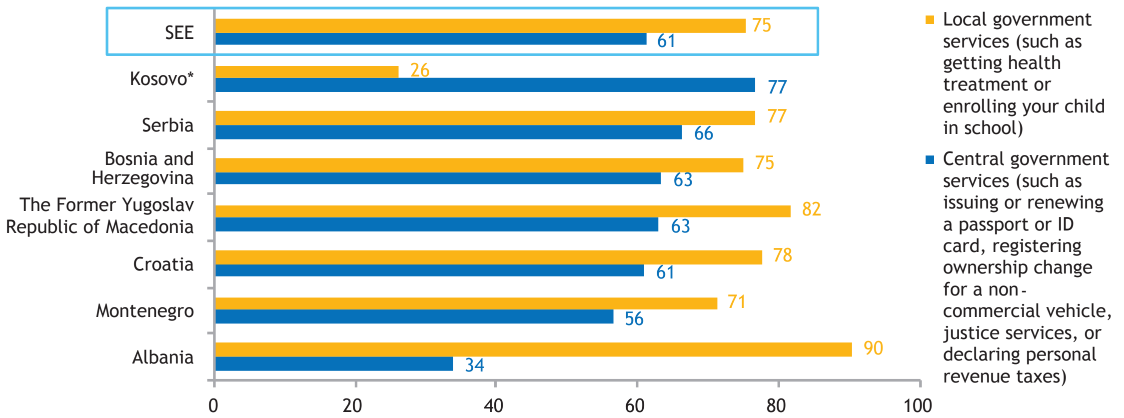


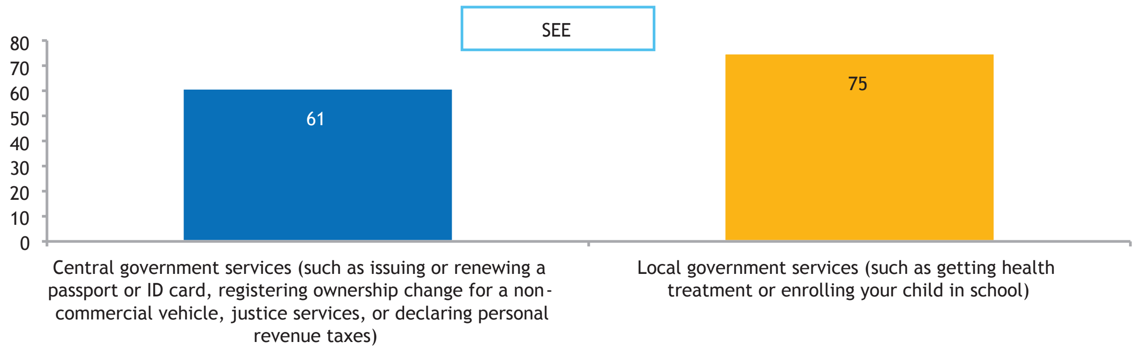
Last year, 67% of the SEE population used some public services. Populations in Bosnia and Herzegovina (72%) and Croatia (75%) were significantly more likely to use public services than people from Montenegro (51%).

Public services were used more by the middle-aged population (30-60 years old: 67%/68%) and the highly educated (70%).

Figure 71: If yes, whether these were central or local government services? (NEW QUESTION)

(Only those who have been in contact with public services - N=4611, share of total, %)





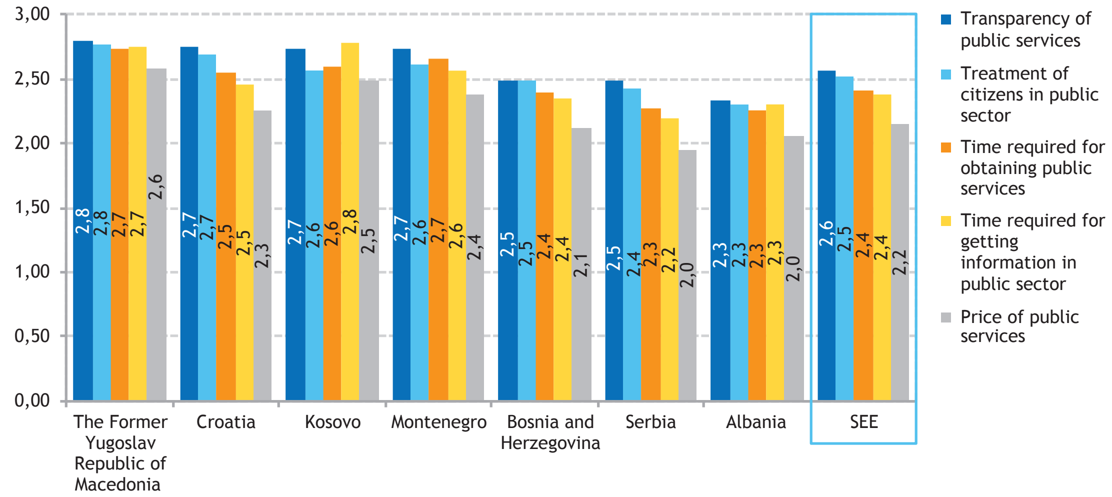
Unsurpisngly, residents of the region tend to use local government services more frequently (75%) than those of the central government (61%); local authorities are much closer to citizens and provide many of the day-to-day services of government.

Kosovo* is an outlier with more people likely to use central government services (77%); this can largely be attributed to the centralization of many services commonly used by citizens. Respondents from Albania used local government services more frequently than others (90%), largely relating to healthcare, education, and the like.

Respondents that are highly educated (69%) and those who rate their social status as above average (76%) were more likely than others to use central government services relating to the issuance of passports and registration of ownership, among others. The oldest respondents (81%) and those who rate their social status as below average (80%) used local government services more frequently.

Figure 72: How would you grade the following issues:

(All respondents - N=7026, scores are on a scale from 1 to 5 where 1 means very poor and 5 excellent, share of total, %)



Looking at the five aspects of government perfofmance under review, transparency of public services received the highest rating (2.7) while the price of those same services received the lowest (2.4). All five aspects, however, were rated poorly and received a score below average (under 3.0).

Governments in Kosovo*, Montenegro and The Former Yugoslav Republic of Macedonia were given better ratings than the regional average while in Serbia government performance was rated the lowest across all five areas.

Transparency of public services was the best rated performance area across the region with the exception of Albania where the time required to get the requested information from government institutions was rated as the best and cost of public services the worst.

The transparency of public services is better rated by highly educated respondents, the treatment of citizens by the public sector is better rated by the oldest group (over 61) whereas the price of public services is better rated by those who rate their social status as above average as well as those who consider themselves highly educated.

In comparison with the last wave, there is a small increase in ratings across all aspects which is significant as it attests to an attempt to improve performance by the region's governments.

Table 15: How would you grade the following issues - comparison 2014/2015/2016

(All respondents - N=7026, scores are on a scale from 1 to 5 where 1 means very poor and 5 excellent, share of total, %)

	2014	2015	2016
Transparency of public services	2,50	2,64	2,70
Treatment of citizens in public sector	2,46	2,58	2,66
Time required for obtaining public services	2,37	2,47	2,55
Time required for getting information in public sector	2,32	2,44	2,52
Price of public services	2,20	2,20	2,37

The graphs below show the rating of each surveyed aspect in the public sector separately for each economy and for the entire SEE region.

Figure 73: How would you grade the transparency of public services (School, police, health system, judiciary, public transport etc.)?

(All respondents - N=7026, scores are on a scale from 1 to 5 where 1 means very poor and 5 excellent, share of total, %)

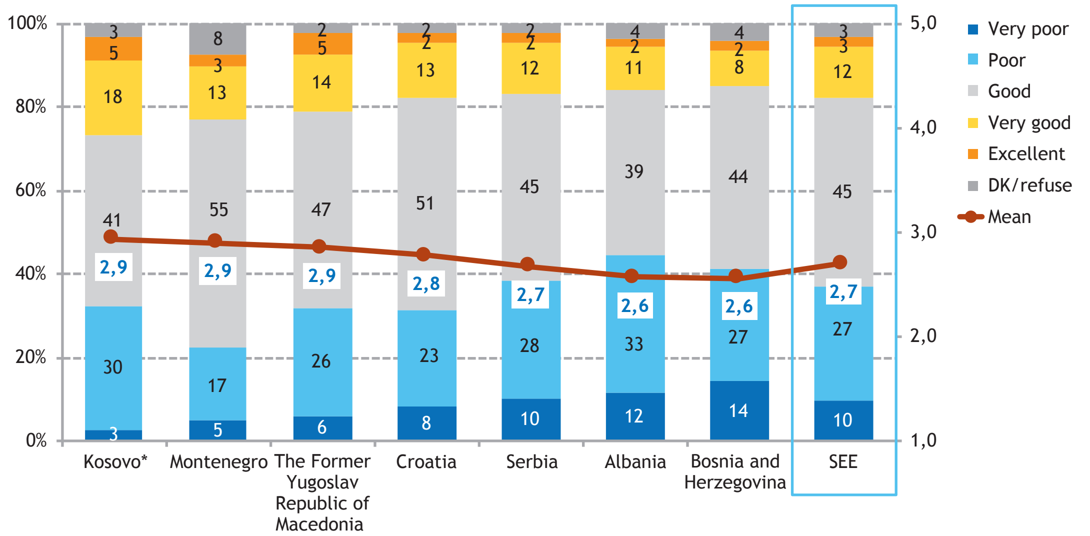


Figure 74: How would you grade the time required to get information from public sector (data which possess bodies of public authority such as documents, registers, record etc.)

(All respondents - N=7026, scores are on a scale from 1 to 5 where 1 means very poor and 5 excellent, share of total, %)

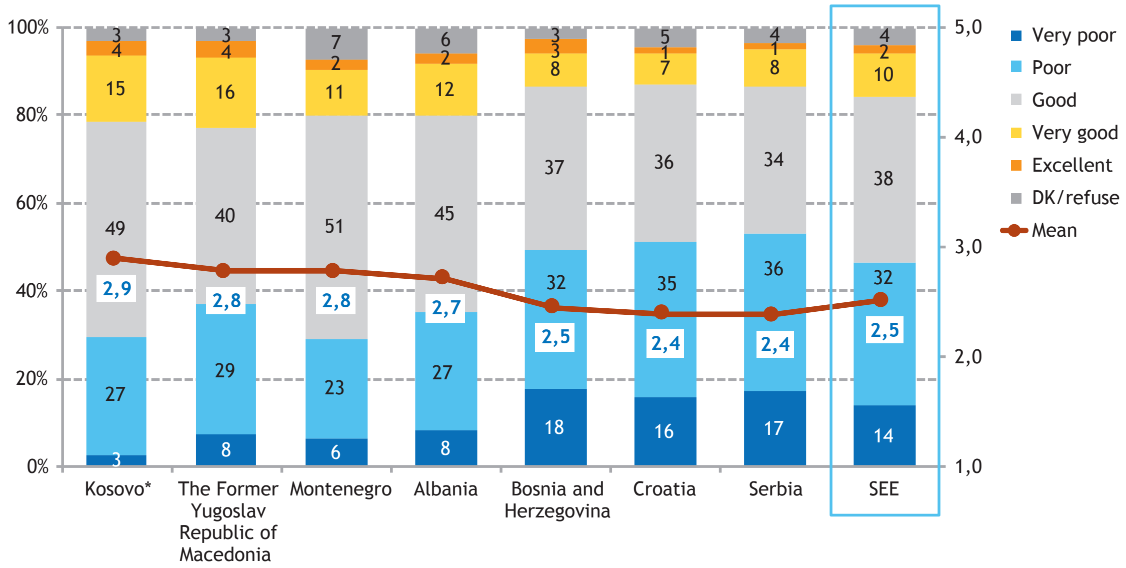


Figure 75: How would you grade the treatment of citizens in public sector (police, health system, judiciary, township etc.)

(All respondents - N=7026, scores are on a scale from 1 to 5 where 1 means very poor and 5 excellent, share of total, %)

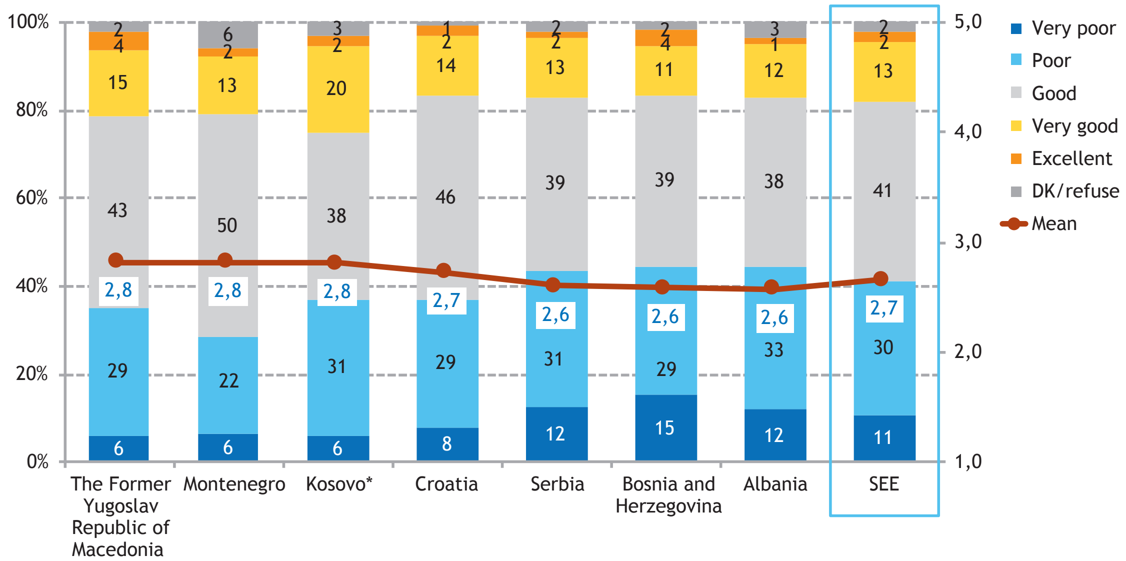


Figure 76: How would you grade the time required to obtain public services (police, health system, judiciary, township etc.)

(All respondents - N=7026, scores are on a scale from 1 to 5 where 1 means very poor and 5 excellent, share of total, %)

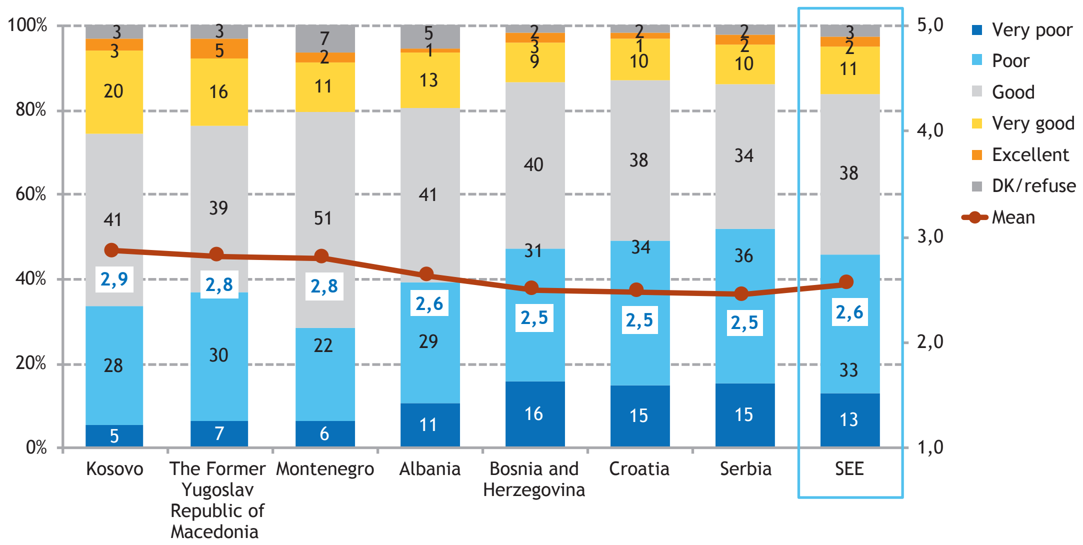


Figure 77: How would you grade the price of public services (e.g. issuance of personal documents, judiciary costs etc.)

(All respondents - N=7026, scores are on a scale from 1 to 5 where 1 means very poor and 5 excellent, share of total, %)

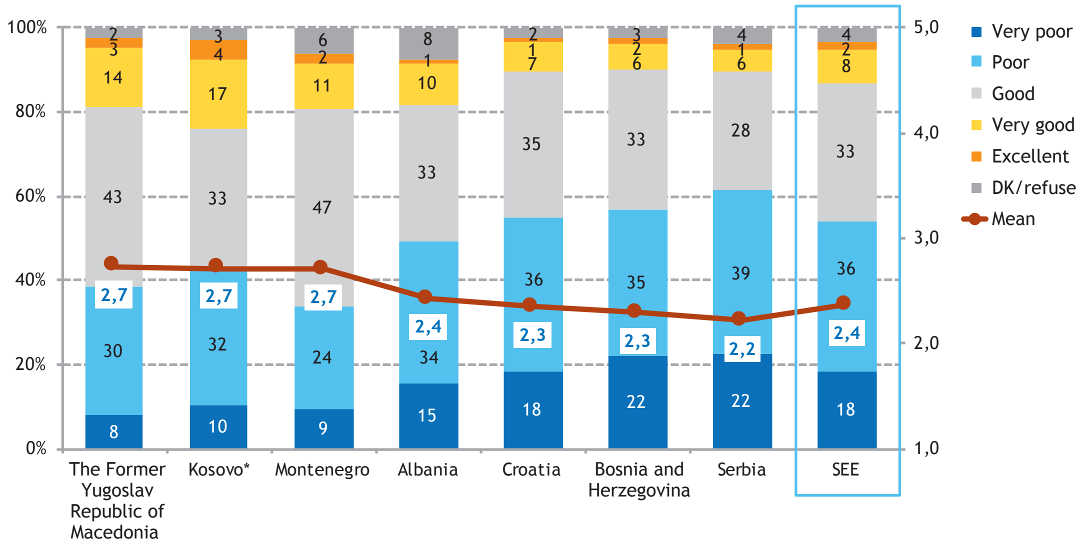
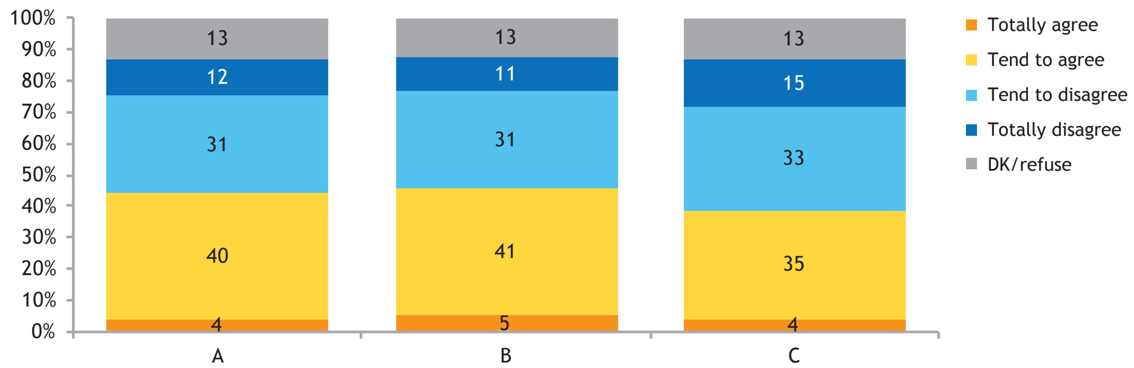


Figure 78: Do you agree with the following statements: (SEE region)(NEW QUESTION)

(All respondents - N=7026, share of total, %))

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



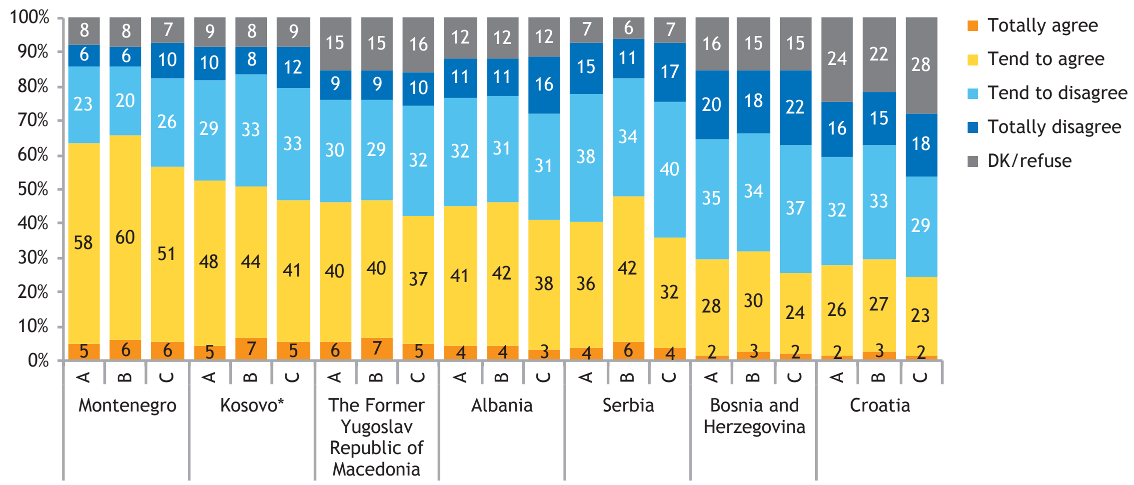
Experiences with requests for information held by a government agency are mixed with the respondents split down the middle; 44% feel that the information is provided in a timely manner while 43% disagree.

The situation is similar with regard to pertinence and timeliness of government information (46% agree, 42% disagree). However, there are more people (48%) who disagree with the statement that the cost of government information is reasonable than those who agree (39%).

Figure 79: Do you agree with the following statements: (by economies)(NEW QUESTION)

(All respondents - N=7026, share of total, %)

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



Looking at the results of the survey regarding access to information held by government agencies across the individual economies, respondents from Montenegro are significantly more likely to give a better performance rating to government (requests are granted in a timely manner - 63%; the information is pertinent and complete - 66%, costs are reasonable - 57%). At the other end of the spectrum, citizens in Bosnia and Herzegovina are least likely to positively assess government performance across the three questions (ranging from 26% to 33%).

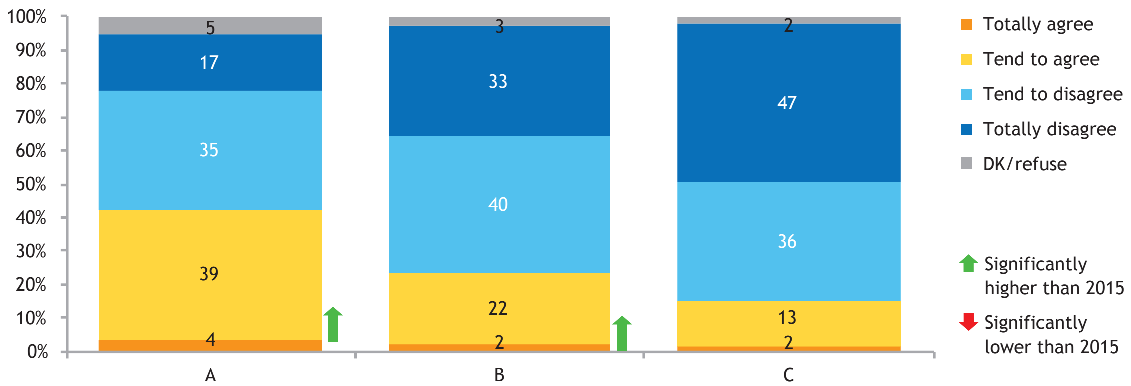
In most economies, the largest number of respondents agreed with the statement concerning the pertinence and completeness of government information (ranging from 30% in Croatia to 66% in Montenegro). As for timeliness of information, Kosovo* respondents were the only group more likely to confirm that the information were provided within the proscribed timelines.

Those who rate their social status as above average are the only demographic group more likely to agree with all of the above statements (requests are granted in a timely manner - 53%; the information is pertinent and complete- 53%, costs are reasonable - 54%).

Figure 80: Do you agree with the following statements: (SEE region)

(All respondents - N=7026, share of total, %)

A - That the administrative procedures in public institutions are efficient?
B - That the law is applied and enforced effectively?
C - That the law is applied to everyone equally?



Respondents were asked to express their views on implementation of laws and the efficiency of administrative procedures by agreeing or disagreeing with the statements offered on a scale of 1 to 4. Looking at the results for all respondents, most positive responses were given with regards to efficiency of administrative procedures in the public sector (43% agree with the statement) while the vast majority disagree with the other two statements relating to the legal system: 83% disagree with the statement that the law is applied to everyone equally and 73% disagree with the statement that the law is applied and enforced effectively.

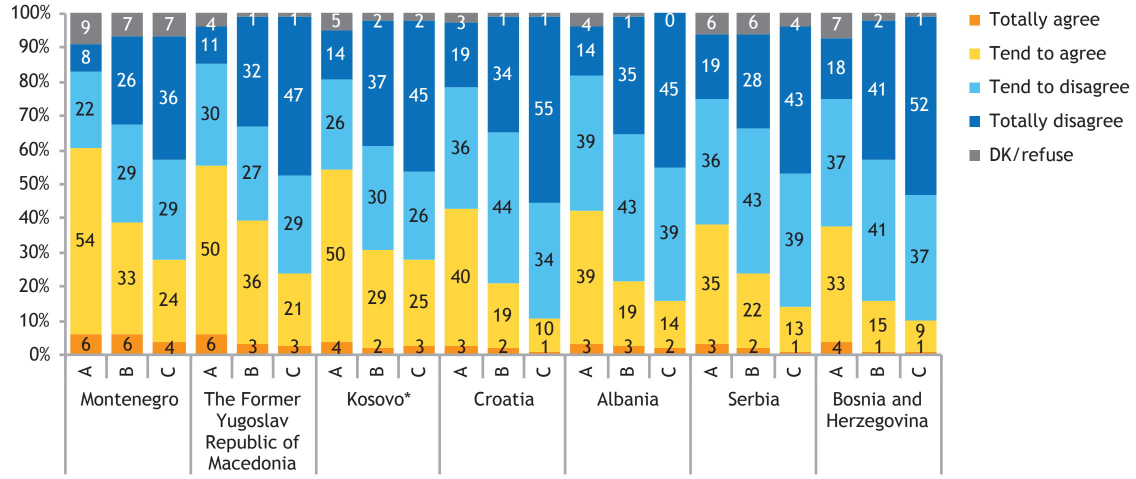
Compared to the 2015 survey, there are significantly more people who believe that administrative procedures in public institutions are efficient (2015: 37% agree; 2016: 43% agree). There is also a significant increase of those who believe that the law is applied and enforced effectively (2015: 21% agree; 2016: 24%).

People who rate their social status as above average are considerably more likely to agree with all of the statements (efficiency of the administrative procedures in public institutions: 54% agree; the law is effectively applied: 40% agree; the law is applied to everyone equally: 31% agree).

Figure 81: Do you agree with the following statements: (by economies)

(All respondents - N=7026, share of total, %)

A - That the administrative procedures in public institutions are efficient?
B - That the law is applied and enforced effectively?
C - That the law is applied to everyone equally?



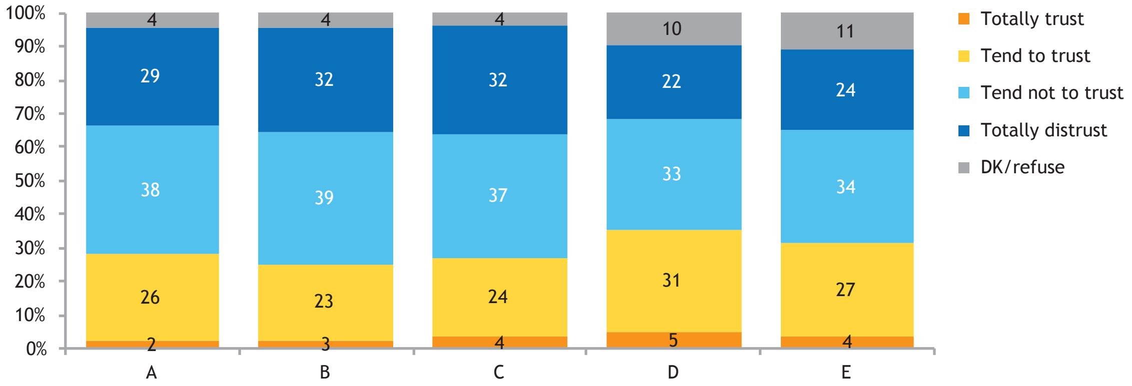
People from Montenegro are most likely to agree with all of the statements on offer. In addition, respondents from The Former Yugoslav Republic of Macedonia (39%) are more likely to agree with the statement related to the effective enforcement of the law while those from Kosovo* tend to feel that law is applied to everyone equally (28%).

Outside of Croatia, survey results for Bosnia and Herzegovina are the most negative with 37% likely to agree with the statement related to efficiency of administrative procedures in public institutions, 16% with the statement on the effective enforcement of law, and only 10% with the statement that the law is applied to everyone equally.

Figure 82: How much trust do you have in certain institutions? (SEE region)(NEW QUESTION)

(All respondents - N=7026, scale from 1 to 4, share of total, %)

A - Courts and judiciary
B - Parliament
C - Government
D - Ombudsman
E - Supreme audit institution



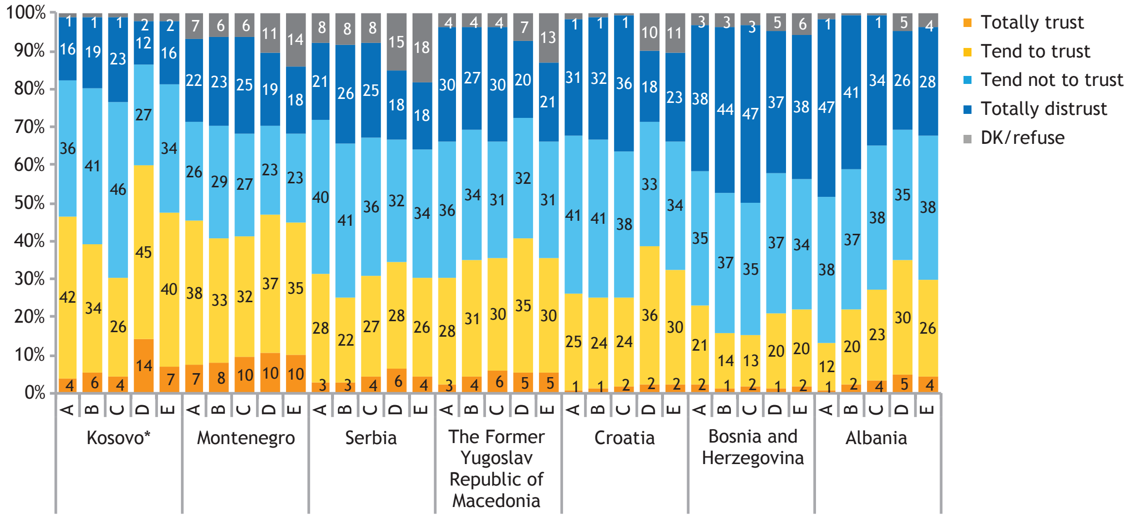
There is a concerning absence of confidence in the institutions listed with negative responses ranging from 55% to 71% of all respondents. The Ombudsman is trusted the most (36%) and parliament enjoys the least amount of public confidence, only 26%.

Respondents who rate their social status as above average express a significantly greater degree of trust in all of the listed institutions (ranging from 41% of those who trust parliament to 49% who trust the ombudsman).

Figure 83: How much trust do you have in certain institutions? (SEE region)(NEW QUESTION)

(All respondents - N=7026, scale from 1 to 4, share of total, %)

A - Courts and judiciary
B - Parliament
C - Government
D - Ombudsman
E - Supreme audit institution



Less than half the population in all of the region's economies trusts the institutions listed with the exception of the ombudsman that enjoys the trust of 59% of the people from Kosovo*.

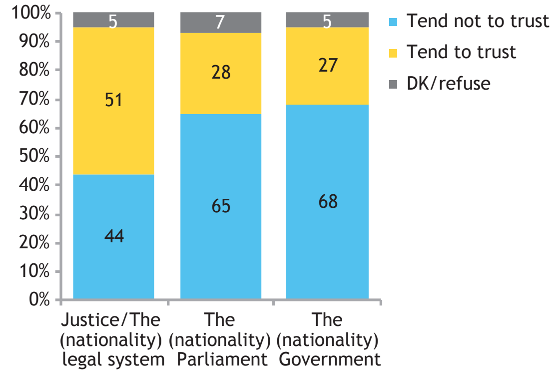
Respondents from Kosovo* and Montenegro are significantly more likely than others to trust public institutions. Ombudsmen is trusted the most in all of the economies although it shares top spot with the supreme audit institution in Albania. Most of the region's economies place the least amount of trust in their governments and parliaments with the exceptions of Albania and The Former Yugoslav Republic of Macedonia where people trust their judiciary the least.

Respondents from Albania are most inclined to distrust their courts (only 13% trust them) whereas people from Bosnia and Herzegovina record the least amount of trust in all of the other institutions surveyed.

Figure 84: For each of the following institutions, please state if you tend to trust it or tend not to trust it:

(share of total, %)

Justice/the (nationality) legal system[6]
The (Nationality) Parliament
The (Nationality) Government



The Eurobarometer survey asked the people of the 28 EU Member States about their confidence in their national justice/legal system, parliament and government. Predictably, there is much greater trust in the national legal systems within the EU (51%) than in their national governments (27%) and parliaments (28%). The SEE population equally trusts all the three pillars of government (ranging from 26% to 28%).

Among the EU Member States, governments of Malta (55%), the Netherlands (54%) and Luxembourg (53%) are trusted the most whereas the government in Greece enjoys the confidence of only 11% of its population and is ranked bottom in the EU.

The people of Greece also have the least amount of trust in their parliament (10%) whereas the national parliaments that are the most trusted are those of Sweden (60%), Denmark (56%), the Netherlands and Finland (54% for both).
Scandinavian countries lead the charts when it comes to public confidence in the justice/legal system with Finland and Denmark tied for top spot with 84%. Respondents in Slovenia (19%) and Bulgaria (20%) have the least amount of trust in their justice/legal system.

The difference in perceptions within the EU reflects the differing levels of trust in the rule of law and varies with changes in political beliefs.

The SEE region is characterized by a low level of trust in the rule of law and a prolonged dissatisfaction with the political landscape. Interestingly, the actual differences in government performance between the SEE region

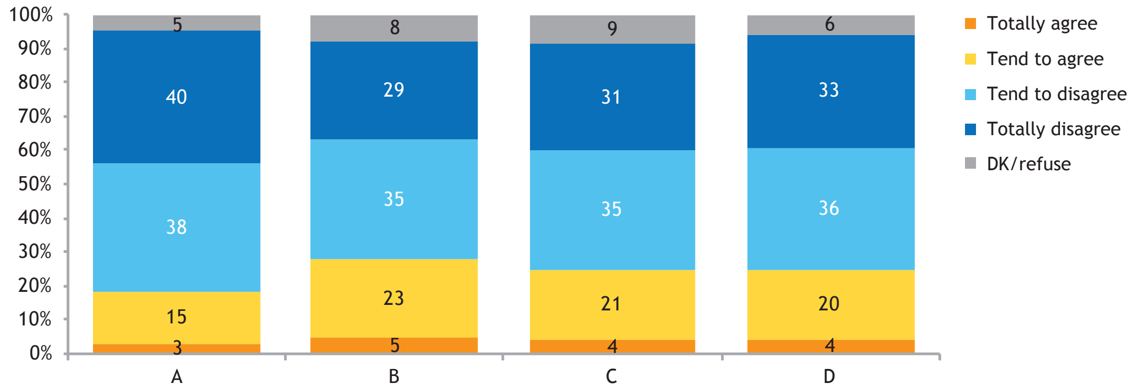
[6] European Commission: „Standard Eurobarometer 85, Spring 2016, Public opinion in the European Union"

and the EU are not fully reflected in the survey findings, outside of the marked difference with regards to confidence in the judiciary. Both regions rate their trust in government and parliament at below 30%. This can be in part attributed to the global disillusionment with the state of politics and the current situation in Europe and the world.

Figure 85: Do you agree that the following institutions are independent of political influence? (SEE region)(NEW QUESTION)

(All respondents - N=7026, scale from 1 to 4, share of total, %)

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

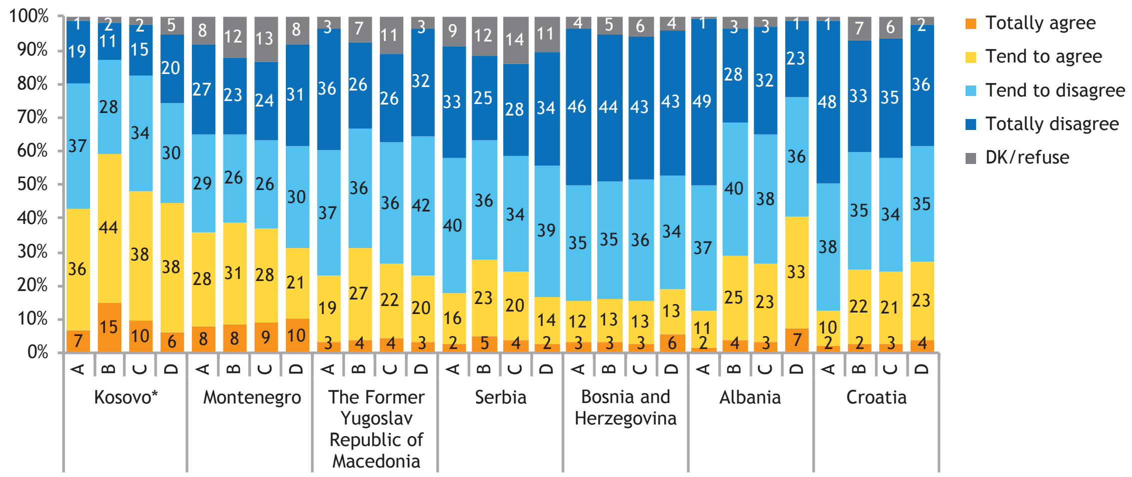


Some three quarters of the SEE population believe that the legal system, the ombudsmen institution, the supreme audit authority and the media are not independent from undue political interference. The legal system is considered least independent (78% disagree with the statement that it is independent) whereas the ombudsmen are considered the most independent, or rather the least dependant (64% disagree with the statement that it is independent). Respondents who rate their social status as above average more frequently cite their belief in the independence of the institutions listed.

Figure 86: Do you agree that the following institutions are independent of political influence? (by economies)(NEW QUESTION)

(All respondents - N=7026, scale from 1 to 4, share of total, %)

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



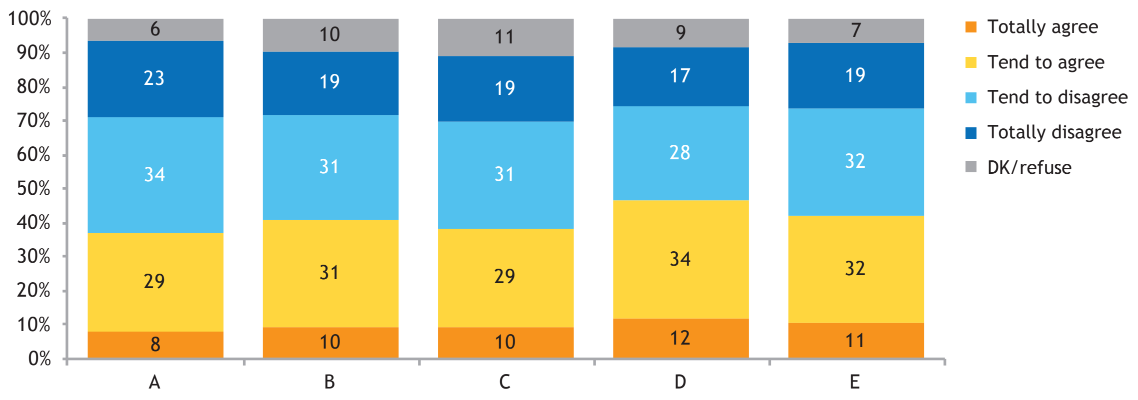
Respondents from Kosovo* and Montenegro are significantly more likely than others to believe in the political independence of democratic institutions. In Bosnia and Herzegovina, individuals trust the political independence of media the most out of all the institutions listed while respondents in Kosovo*, Montenegro, The Former Yugoslav Republic of Macedonia and Serbia more often cite their belief in the independence of the ombudsmen.

Looking at the region, respondents from Bosnia and Herzegovina rated their institutions the lowest across the board with the exception of the legal system.

Figure 87: Do you agree that the following institutions can effectively scrutinize the government and make it accountable to citizens? (SEE region)(NEW QUESTION)

(All respondents - N=7026, scale from 1 to 4, share of total, %)

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



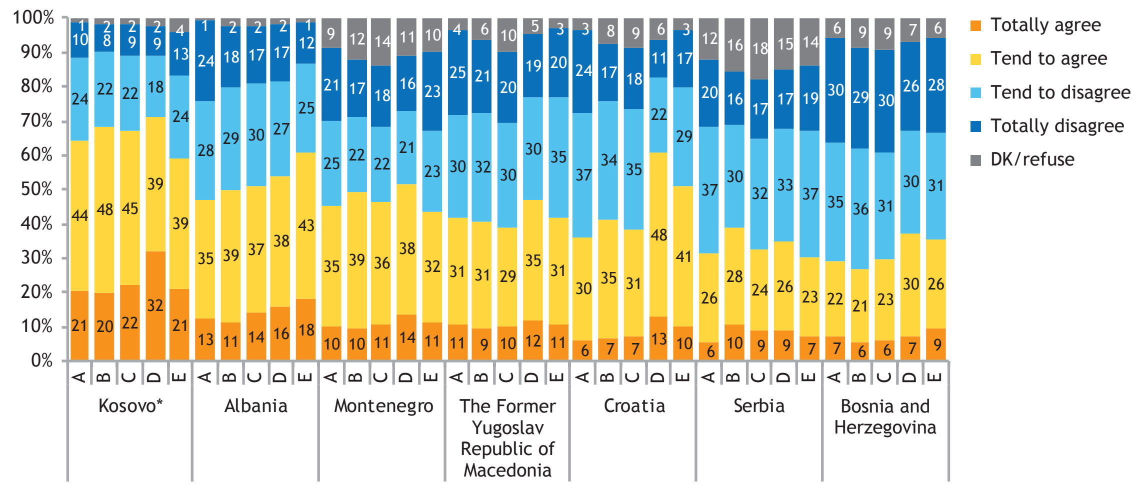
Less than half of the SEE population believes that the institutions listed have a critical attitude towards the government and that they help make it accountable to citizens. Citizens and civil society organizations are most likely to be critical of the government (46% agree with the statement) while parliament is least likely to openly scrutinize or criticize the work of the government (37% agree with the statement).

To a significantly greater extent, the highly educated and those from the youngest bracket agree that the institutions surveyed do tend to adopt a critical attitude towards the government and that they help make it accountable to the citizens. The proportion of the highly educated who agree with the above statements ranges from 46% when it comes to the parliament to 57% when it comes to the citizens and civil society organizations whereas the proportion for the youngest respondents ranges from 45% when it comes to the parliament to 55% when it comes to citizens and civil society organizations.

Figure 88: Do you agree that the following institutions can effectively scrutinize the government and make it accountable to citizens? (by economies)(NEW QUESTION)

(All respondents - N=7026, scale from 1 to 4, share of total, %)

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



Respondents from Kosovo* are significantly more likely to agree that all of the institutions listed can help scrutinize the government, from 60% (the media) to 71% (citizens and civil society organizations) while those numbers tend to be lowest for Bosnia and Herzegovina. Apart from respondents from Kosovo*, the people from Albania are significantly more likely to agree with the statements relating to the critical attitude of the supreme audit institution and the media towards the government.

There is broad consensus across the region with regards to the role of citizens and civil society organizations as the foremost government critics, except in Serbia where this role is most commonly bestowed upon the ombudsperson, and Albania, where they see the media performing this role more frequently than any other actor.

PERCEPTIONS OF CORRUPTION

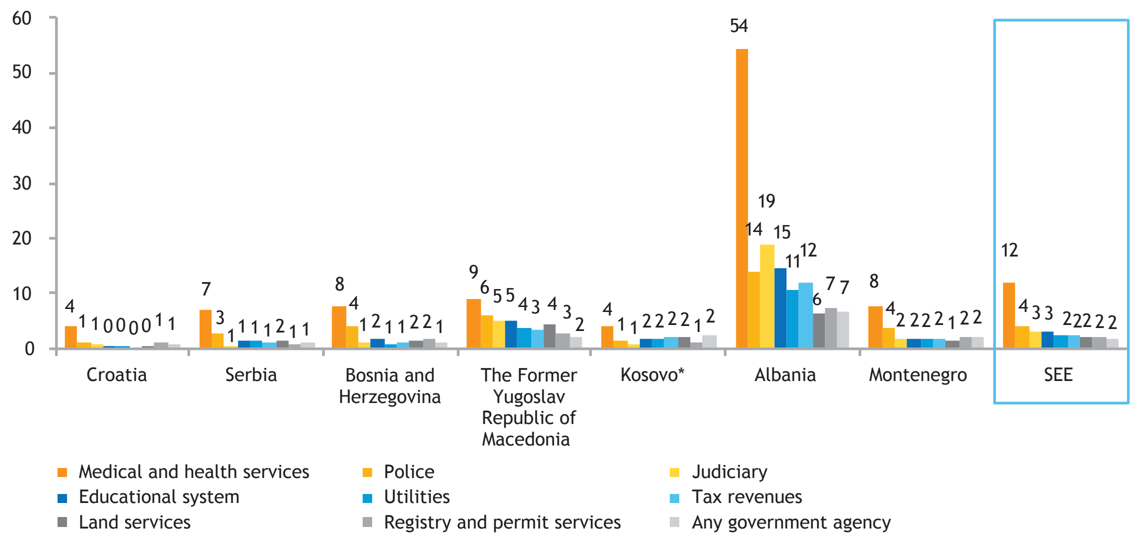
Perceptions of corruption further corroborate the overwhelming sentiment that rule of law remains a problem.

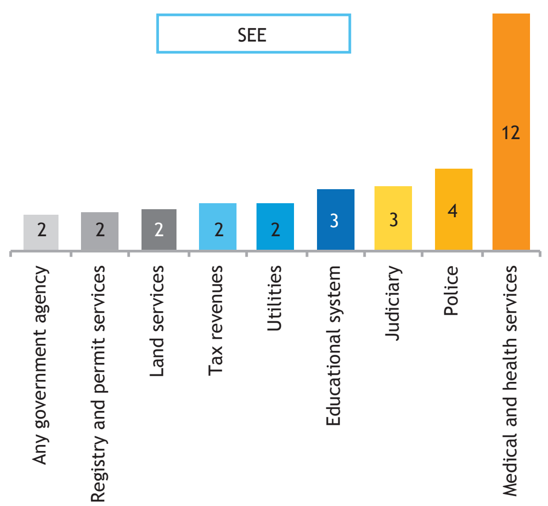
Corruption is seen as pervasive across the region. Career progression in the public sector is seen as inextricably linked to personal connections. Overall, smaller economies tend to perceived as less corrupt.

As has become standard in these surveys, while respondents report widespread and pervasive corruption, few volunteer information on own involvement in any corruptive practices.

Figure 89: In your contact or contacts with the institutions, have you or anyone living in your household paid bribe in any form in the past 12 months in the following institutions: (NEW QUESTION)

(All respondents - N=7026, scale from 1 to 4, share of total, %)





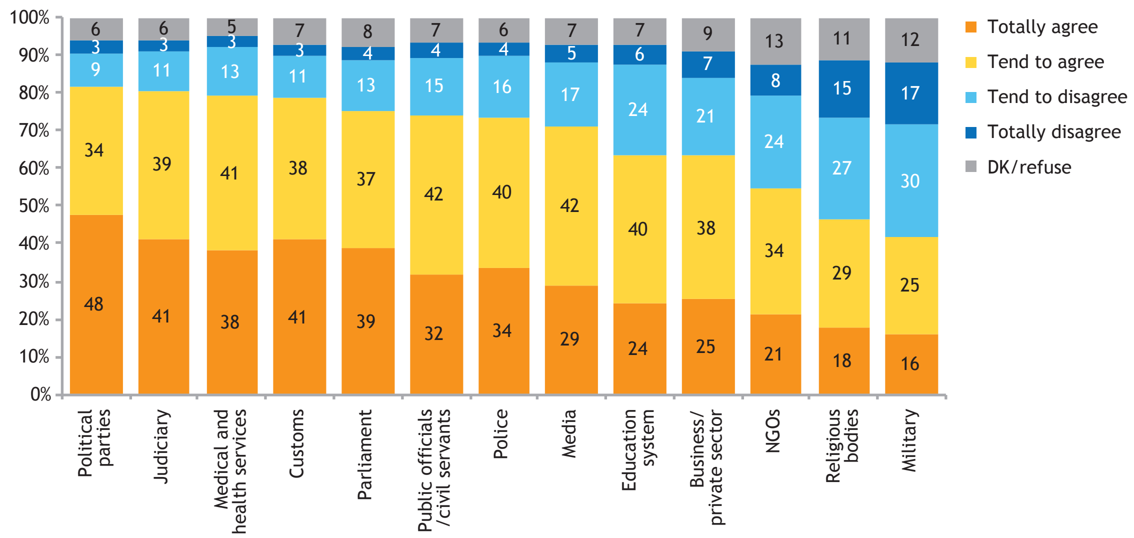
Looking at the region, bribes appear to be most widespread in healthcare (12%) while they range from 2% to 4% in other sectors. Albania seems to be convincingly ahead of other economies in the region when it comes to the prevalence of bribes. As many as 54% of the respondents report paying bribes to healthcare providers in the last 12 months whereas a large segment (10%-20%, depending on the sector) report bribing the police, the judiciary, education providers, utilities and taxation authorities.

The Former Yugoslav Republic of Macedonia is in distant second, and respondents are more likely to pay bribes to education providers, the judiciary, the police, utility companies and land services.

Within the youngest category (18-29 years old), there are significantly more of those whose families bribed education providers (6%). The low-skilled (18%), those who rate their social status as above average (16%) and those who rate it as below average (20%) are more likely than others to pay bribes for health services. Those who rate their social status as above average are more likely to pay bribes for the registry and permit services (7%) and to taxation authorities (10%).

Figure 90: To what extent do you agree or not agree that the following categories in your economy are affected by corruption? (SEE region)(NEW QUESTION)

(All respondents - N=7026, scale from 1 to 4, share of total, %)



The majority of respondents believe that as many as 12 of the 13 surveyed institutions are affected by corruption. Out of all the surveyed institutions, the armed forces are alone in being considered by respondents as less likely to be corrupt (47%) than corrupt (41%). Political parties (82%), judiciary (80%), health care institutions (79%) and customs (79%) are considered the most corrupt by the SEE population. 47% of the population believe that religious authorities are corrupt and 55% believe the same for NGOs.

Those who rate their social status as below average are more likely to see corruption across the institutional landscape.

Table 16: To what extent do you agree or not agree that the following categories in your economy are affected by corruption? (by economies)(NEW QUESTION)

(All respondents - N=7026, multiple answers, share of total, %)

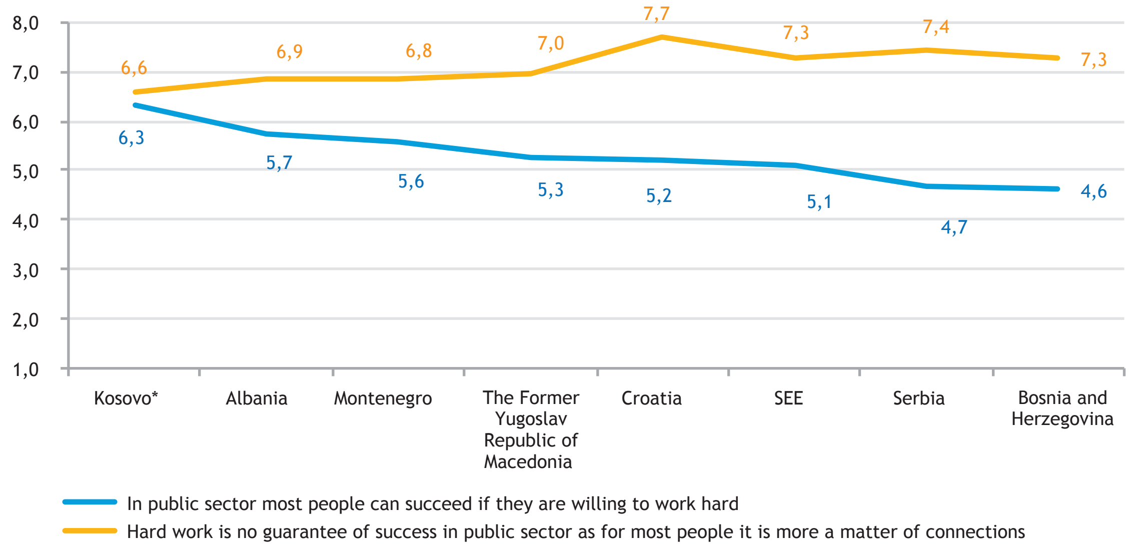
	Albania	Bosnia and Herzegovina	Croatia	Kosovo*	The Former Yugoslav Republic of Macedonia	Montenegro	Serbia
Judiciary	90	83	89	72	76	65	76
Political parties	89	88	89	73	74	70	76
Customs	87	83	78	65	73	66	80
Medical and health services	87	85	76	68	66	65	82
Parliament	83	85	84	68	67	59	68
Public officials /civil servants	73	83	77	62	64	63	74
Education system	72	75	55	68	49	55	63
Police	70	82	74	56	58	65	78
Media	54	80	76	63	73	65	71
Business/private sector	54	76	71	57	50	55	60
NGOs	51	63	51	48	51	50	57
Military	44	59	36	42	29	35	39
Religious bodies	29	61	52	35	39	35	46

Bosnia and Herzegovina leads the corruption perception charts with a high proportion of respondents reporting corruption across the institutional landscape. Along with respondents from Bosnia and Herzegovina, individuals from Albania are more likely to perceive political parties as corrupt, customs (perceived as corrupt by the people from Serbia as well), and medical and health services. Along with the public in Bosnia and Herzegovina, respondents from Serbia perceived the police as more corrupt than did the rest of the region.

The lowest corruption perception ratings were afforded to the institutions of Montenegro, Kosovo* and The Former Yugoslav Republic of Macedonia. Religious bodies were assessed as the least corrupt in Albania and Kosovo* whereas it is the military that was assessed least negatively in the other economies.

Figure 91: Which statement comes closer to your own views? (NEW QUESTION)

(All respondents - N=7026, scale from 1 to 10, share of total, %)



Respondents were asked to express their views by agreeing or disagreeing with the two survey statements on a scale of 1 to 10. The findings are rather disheartening: both in the region as a whole and in every individual economy the majority of people feel that hard work means less than connections when it comes to succeeding in the public sector (mean at the level of the SEE region was 7.3). There are much fewer respondents who feel that success is directly linked to hard work (mean at the level of the SEE region was 5.1).

People from Kosovo* (6.3) are significantly more likely than others to agree with the statement that hard work is the key to success in the public sector whereas respondents from Serbia are significantly more likely to agree with the statement that success in the public sector depends on connections and acquaintances (7.4).

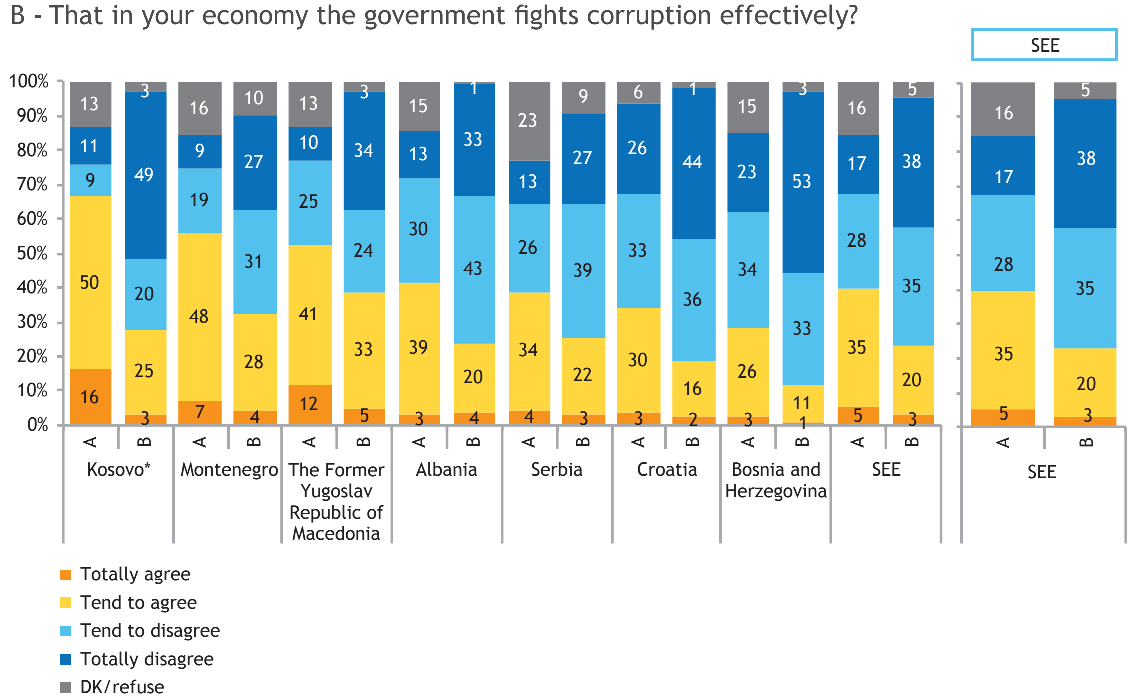
Those who rate their social status below average are significantly more likely to agree with the statement that success in the public sector depends on connections and acquaintances (7.5).

Figure 92: Do you agree with the following statements: (NEW QUESTION)

(All respondents - N=7026, scale from 1 to 4, share of total, %)

A - That written government information (such as laws, decisions, web pages, forms) is overall easy to understand and uses plain language?

B - That in your economy the government fights corruption effectively?



The majority of the SEE population do not perceive their government as effectively combating corruption (73%) while 40% agree that the information provided by the government in writing is easy to understand.

People from Kosovo* (66%), Montenegro (55%) and The Former Yugoslav Republic of Macedonia (53%) are more likely to agree that the government provides information in a way that is easy to understand. People from Montenegro and The Former Yugoslav Republic of Macedonia more frequently agree that their government effectively fights corruption (Montenegro - 32%, The Former Yugoslav Republic of Macedonia - 38%).

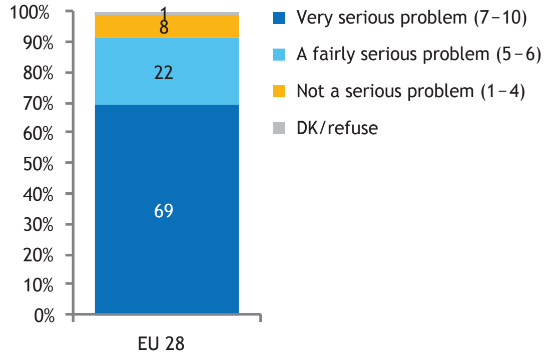
Respondents from Bosnia and Herzegovina are least likely to agree that the government is effective in its efforts to combat corruption (12%).

No variations were noted compared with the results of the 2015 survey.

The highly educated (58%) and the younger population (18-45 years old) (50%/52%) are more likely to agree that the government's written information is easy to understand. Those who rate their social status as above average (36%) are more likely to agree that their government effectively fights corruption.

Figure 93: Do you agree with: (Nationality) Government efforts to combat corruption are effective.

(Share of total, %)[7]



Special Eurobarometer on Corruption includes the same question directed at the population of the 28 EU members. The results show marked similarities in the thinking of respondents about the effectiveness of the governments' efforts at curbing corruption across the two regions.

A mere 23% of respondents across both areas (SEE and EU) feel that their government is fighting an effective campaign against corrupt practices while the majority disagrees (73% for the SEE and 64% for the EU).

Regardless of the level of corruption, estimated at a significantly higher level in the SEE than in the EU, the public in both areas is overwhelmingly dissatisfied with the readiness of governments to curb political sources of corruption. The corruptive influence of money on parties and elections, as well as on party programs and government policies, is highlighted as particularly damaging.

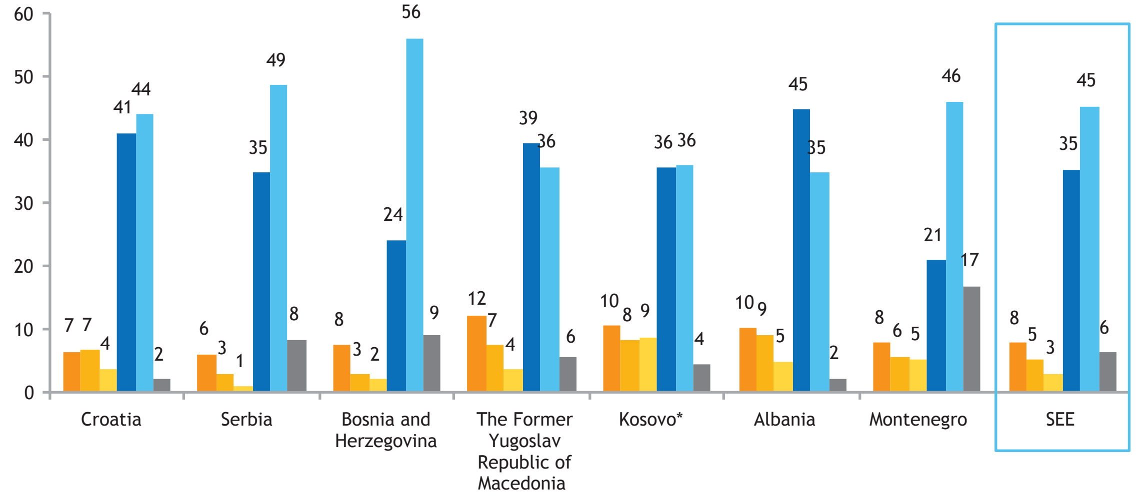
[7]European Commission: „Special Eurobarometer 397 Corruption", February-March 2013

PARTICIPATION IN DECISION MAKING

Consistent with the overall sentiment present throughout the survey, there is a concerning disconnect between the public and private spheres. People on average expect little from their governments and invest as much in attempts to influence public policies and government decisions.

Figure 94: Have you ever done something that could affect any of the government decisions?

(All respondents - N=7026, share of total, %; multiple answer)



In terms of taking part in activities that may affect the government's decision making, the SEE region seems to be either inert or indifferent. In fact, 45% of the entire population do not even discuss government's decisions while 35% discuss them only with people they privately know and outside of a public setting. Only 8% of them protested, 5% commented the government's decisions on social networks and 3% participated in public debates.

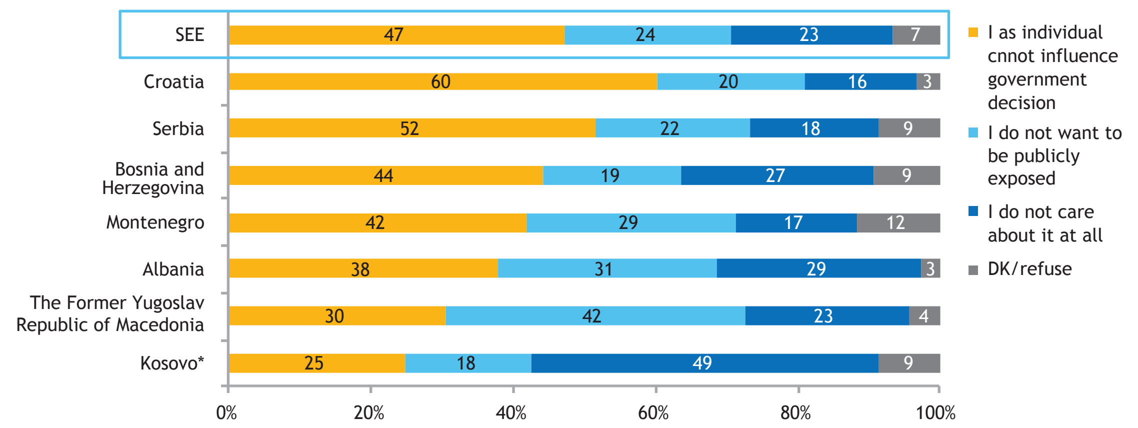
People from Kosovo* are significantly more involved in public debates (9%) while people from The Former Yugoslav Republic of Macedonia participate more in mass protests (12%). The latter is likely influenced by the recent development in that particular economy. Albania stands out with a significantly larger proportion of people who discuss the government's decisions, but not publicly (45%), whereas most people in Bosnia and Herzegovina do not even bother discussing the government's decisions (56%).

The youngest respondents (18-29 years old) are significantly more likely to comment on social networks (11%), to participate in mass protests (11%) but they are also much more likely to not broach this topic in conversation (46%). Highly educated people are significantly more active than others through frequent involvement in public debates (7%), participation in mass protests (12%) and commenting on social networks (10%). People who rate their social status as above average are also more likely to comment on social networks (13%). Those who rate their social status below average are more involved in mass protests (11%) while men more often discuss politics with friends but away from a public setting (39%).

Compared with the 2015 survey, there are slightly more people who are actively involved in activities that could affect the government's decisions.

Figure 95: What is the main reason why you are not actively involved in government decision-making?

(Those who have never done anything which could affect government decision - N=5403, %)



The most common reason stated for the lack of active involvement in government decision-making is an overwhelming sensation that an individual cannot influence decisions made by government (reason stated by 47% of those who are actively involved). 24% fear public exposure while 23% do not care.

There are cross-economy variations in the region in terms of the reasons for the lack of involvement in decision-making. The prevailing reason cited in Serbia, Bosnia and Herzegovina, Montenegro and Albania is the perceived inability of an individual to influence government decision-making. More people in Kosovo* cite a general lack of interest (49%). People in The Former Yugoslav Republic of Macedonia are significantly more likely than others to cite fear of public exposure (42%).

The youngest (18-29 years old) (32%), those middle-aged (30-45) (28%) and the low-skilled (33%) are significantly more likely to cite lack of interest, those highly educated a reluctance to be publicly exposed (29%) and the oldest a belief that individuals cannot change anything (51%).

Focus on Turkey

MAIN FINDINGS

The one striking feature of the relationship between the SEE and Turkey is the lack of information about the region in Turkey itself. Due to historical, economic and other factors a number of individuals from the SEE have personal and informal ties with the country but there is little in the way of political, social, and economic data on the region readily available in Turkey. This suggests ample room for greater connectivity that needs to be better exploited.

The Turkish government commands more confidence among its citizens than most SEE governments. Turkish citizens participate more actively in public life and place more confidence in the establishment - practically all Turkish institutions enjoy more credibility than their SEE counterparts.

In terms of economic development, the SEE citizens are less satisfied, but are more optimistic in their outlook. This is, in part, connected to the underlying difference between the two; for Turkey, security remains a key concern, unlike in the SEE, and this tends to dim expectations and create anxiety.

Turks also more commonly attribute success to hard work and education, while connections dominate the thinking in the SEE region. Similarly, corruption is perceived as less of a problem in Turkey. Overall, the comparison with Turkey is rather unfavourable to the SEE.

Interestingly, while the chances of a Turkish accession have all but evaporated in the near to medium term, Turkey is less of a Eurosceptic than some of the larger SEE economies. This is, in part, due to strong economic bonds that bind Turkey to the EU. One of the few similarities between the two is their shared motivation for joining the EU: travel for work and education. It is important to note, however, that a much smaller proportion of Turks wish to leave their country in search of life abroad.

ECONOMIC OVERVIEW: TURKEY

The Turkish economy has gone through a significant transition since the last major crisis at the turn of the century, helping it weather the 2008 crisis with relative ease. The average real growth rate since 2002 has been 5.7 percent though growth has stalled and is forecasted to drop to around 3 percent in the medium run, largely due to growing political instability. The unemployment rate is around 10 percent, which is low by SEE standards.

Export of goods and services has declined last year, which is a worrying development. This is, in part, due to worsening economic conditions in major exporting markets, such as Russia. However, compared with the boom and bust cycles that characterised the Turkish economy before the reforms of the early 2000s, economic institutions are much more stable and policies are supportive of growth and development. Clearly, political risks dominate the public agenda and influence sentiments and expectations.

Table 17: Turkey - Life satisfaction and assessment of generaltrends

How are you satisfied with the way things are going in your society?

	I'm completely dissatisfied	I'm mostly unsatisfied	Neither satisfied nor dissatisfied	I'm mostly satisfied	I'm completely satisfied	DK/refuse
Turkey	12,4	30,5	21,4	29,6	5,9	0,3
SEE	27,0	31,2	27,8	12,6	1,2	0,2

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

	I'm completely dissatisfied	I'm mostly unsatisfied	Neither satisfied nor dissatisfied	I'm mostly satisfied	I'm completely satisfied	DK/refuse
Turkey	11,8	25,7	23,2	34,2	4,9	0,1
SEE	18,3	25,7	28,7	24,5	2,6	0,2

How are you satisfied with the economic situation in your society?

	I'm completely dissatisfied	I'm mostly unsatisfied	Neither satisfied nor dissatisfied	I'm mostly satisfied	I'm completely satisfied	DK/refuse
Turkey	11,7	33,4	23,3	25,6	5,7	0,2
SEE	29,1	37,6	23,2	8,9	0,7	0,5

How satisfied are you with the overall security situation in your society (as concerns the level of isks of crime, terrorism, problems connected with uncontrolled migration, violent conflicts)?

	I'm completely dissatisfied	I'm mostly unsatisfied	Neither satisfied nor dissatisfied	I'm mostly satisfied	I'm completely satisfied	DK/refuse
Turkey	17,9	31,8	20,4	23,9	6,1	0,0
SEE	18,3	26,3	28,2	22,9	3,5	0,8

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

	Better	Worse	The same	DK/refuse
Turkey	26,7	22,1	46,5	4,6
SEE	27,5	19,4	49,9	3,2

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

	Better	Worse	The same	DK/refuse
Turkey	25,3	25,0	43,7	5,9
SEE	24,5	26,1	46,4	3,0

What do you think are the two most important problems facing your society?

	Security issues/ terrorism	Unemployment	Economic situation	Refugees	Crime	Political disputes	Corruption	Border issues
Turkey	47,6	43,6	37,1	14,4	14,3	11,0	8,0	5,9
SEE	1,4	67,0	45,8	2,4	16,5	0,5	0,5	0,5

	Protection of human rights	Judicial system	Brain drain /emigration	Problems with minorities	Gender inequality	Climate change (floods, droughts, etc.)	Integration of Roma	Something else
Turkey	5,7	3,8	2,0	1,6	1,3	0,4	0,5	2,9
SEE	2,8	4,7	10,2	0,5	0,3	1,0	0,1	5,4

How satisfied are you with the following:

	Health services	Schools/ education system	Quality of transport infrastructure	Utility services	Safety from crime	Cleanliness of my city/town/village	Social life
Turkey	3,35	3,02	3,48	3,46	3,00	3,56	3,38
SEE	2,83	3,09	2,91	3,09	2,78	3,12	3,22

	Present job	Public services in general	Administrative services from central government	Accessibility to public services via a digital channel	Level of prices	Tolerance and respect of differences
Turkey	2,95	3,48	3,49	3,57	2,73	3,19
SEE	3,24	3,24	3,24	3,24	3,24	3,24

When it comes to social and employment issues, in your opinion, in which of the following areas should your government invest its resources as a priority?

	Energy sector	Transport infrastructure	Social infrastructure	Tourism	Agriculture	Science and technology	Industrial development	Small and medium enterprise development	DK/ refuse
Turkey	13,8	8,5	17,5	7,6	12,6	9,0	11,9	13,7	5,4
SEE	4,0	4,2	12,1	6,7	21,8	6,5	26,1	16,4	2,2

In your opinion, which area should be dealt with most urgently in your society

	Violence against women	Women being paid less than men for the same work	Women receiving lower pensions than man	Facing prejudice because of preconceived ideas about the image and role of women and men	The low number of women in positions of power in politics and businesses
Turkey	89,2	19,1	8,1	20,7	17,5
SEE	65,3	29,2	16,0	30,5	29,0

	Women being more likely to be poor than men	The unequal sharing of household tasks between men and woman	Higher drop-out rate amongst boys in education	Tackling lower life expectancy amongst men
Turkey	14,3	7,8	10,2	5,9
SEE	12,9	17,6	6,7	6,7

As with the SEE population, Turks tend to be more satisfied with their household's financial situation than that of their economy. Turkey's population, however, tends to be more satisfied than their SEE counterparts on both counts: in terms of own finances, 39% respondendents in Turkey are satisfied with their finances versus 27% in the SEE while there is an even more dramatic difference in their perception of the national economy (31% for Turkey against only 10% for SEE). As an illustration, the population of Montenegro, the most satisfied with its economic situation out of all the economies of the SEE region, has only a 20% satisfaction rate.

When it comes to expectations in terms of the future financial situation, the situation in Turkey is similar to the one in the SEE region. In fact, in both cases, about 27% forecast improvement in their personal financial situation and slightly fewer (25%) expect their economy to do better. In Turkey, there are more of those who foresee a worsening in their personal financial situation (Turkey: 22%; SEE: 19%) whereas people in the SEE region are more likely to believe that the situation will remain the same over the next twelve months (Turkey: 47%; SEE: 50%). Forecasts are similar for the national economic situation.
Large variations between Turkey and the SEE region are notable in perceptions of the most important problems. The people of Turkey are notably more concerned about security issues/terrorism (Turkey: 48%; SEE: 1%). Among the SEE economies, terrorism is seen as a major concern in Albania only (but by a mere 3% of respondents).

Unemployment, while ranked second, is perceived as a problem to a significantly lesser extent than in the SEE region (Turkey: 44%; SEE: 67%). The economic situation is rated as the third most pressing issue. Compared to the SEE population, Turks are naturally more concerned with refugees (Turkey: 14%; SEE: 2%) and border issues (Turkey: 6%; SEE: 0.5%). On the other hand, corruption in Turkey is almost a non-issue compared to the prevailing perceptions in the SEE region (Turkey: 8%; SEE: 32%). Brain drain and emigration are also less important to the people of Turkey than their counterparts in the SEE (Turkey: 2%; SEE: 10%). In terms of satisfaction with the thirteen aspects of life on survey, the people of Turkey are largely happy with eleven. In fact, they are satisfied with all but a) quality of education, and b) tolerance and the respect of differences. Taking into account all the aspects under review, respondents are most satisfied with accessibility to public services via digital channels (mean: 3.57) and with the cleanliness of their city/town (mean 3.56). They are least satisfied with the level of prices (mean 2.73) and their current jobs (mean 2.95).

In order to reduce unemployment and address pressing social problems, the Government of Turkey, in the opinion of its citizens, should prioritize investment in social infrastructure (18%), such as schools, hospitals and the like. At the level of the SEE region, social infrastructure is ranked in fourth place, behind agriculture, industry, and small and medium enterprises. In addition to social infrastructure, the energy sector (14%), agriculture (13%), industry (12%), and small and medium enterprises (14%) are ranked at an almost identical level among the preferred investment priorities. In the SEE region, agriculture and industry are seen as important, while Turks prioritize investments in the energy sector, transport infrastructure, science and technology.

When it comes to gender inequality, the people of Turkey see violence against women (89%) as the absolute priority to be urgently addressed. This is followed by a higher drop-out rate among boys in school, a problem perceived more seriously than in the SEE region (Turkey: 10%; SEE: 7%). All other gender related issues are seen as significantly less important in terms of proposed government priorities. The largest difference between Turkey and the SEE region is on the issue of unequal sharing of household tasks which is considered as the priority issue by only 8% of people in Turkey compared to 18% of the SEE population. The situation is similar with regard to the number of women in politics and business (18% Turkey, SEE: 29%) and the issue of women being paid less than men for the same work (Turkey: 19%; SEE: 29%).

Table 18: Turkey - Attitudes on regional cooperation and EU integration

What do you think are the most important problems facing the entire SEE region at the moment?

	Economic situation	Security issues/ terrorism	Unemployment	Refugees	Political disputes	Border issues	Protection of human rights	Crime
Turkey	15,5	14,5	12,3	6,7	4,6	3,0	2,9	2,0
SEE	28,2	1,9	6,7	6,7	6,7	6,7	6,7	6,7

	Corruption	Brain drain/ emigration	Problems with minorities	Judicial system	Climate change	Integration of Roma	Gender inequality	Something else	DK/refuse
Turkey	1,8	1,3	1,1	0,9	0,8	0,3	0,0	0,5	31,7
SEE	9,9	3,3	0,8	0,9	0,3	0,1	0,1	0,9	0,0

Do you agree that the relations in SEE are better than 12 months ago?

	Totally disagree	Tend to disagree	Tend to agree	Totally agree	DK/refuse
Turkey	5,8	21,4	29,1	3,3	40,3
SEE	17,1	33,4	33,5	3,6	12,3

Do you agree that regional cooperation can contribute to the political, economic or security situation of your society?

	Totally disagree	Tend to disagree	Tend to agree	Totally agree	DK/refuse
Turkey	2,6	14,1	46,6	7,2	29,5
SEE	5,6	13,4	51,1	22,3	7,6

How important would you assess the issue of integration of Roma for regional cooperation?

	Not important at all	Not very important	Important	Very important	Highly important
Turkey	8,3	16,9	51,7	13,9	9,3
SEE	14,4	24,6	41,3	14,2	5,6

How important would you assess the issue of integration of Roma for EU accession?

	Not important at all	Not very important	Important	Very important	Highly important
Turkey	12,6	22,9	41,6	16,3	6,6
SEE	13,3	22,4	39,1	17,0	8,2

How satisfied are you with the level of information available on developments in other parts of the SEE region?

	I'm completely dissatisfied	I'm mostly unsatisfied	Neither satisfied nor dissatisfied	I'm mostly satisfied	I'm completely satisfied	DK/ refuse
Turkey	3,1	14,8	22,8	18,5	3,9	36,9
SEE	5,8	12,9	38,1	30,8	6,3	6,2

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

	Good thing	Neither good nor bad	Bad thing	DK/refuse
Turkey	42,6	34,0	20,5	2,9
SEE	41,6	36,1	18,6	3,6

What would EU membership mean to you personally?

	Freedom to travel	Freedom to study and/or work in the EU	Economic prosperity	Peace and stability	Social protection	Gender equality	Loss of sovereignty of your country	Nothing good/ positive	DK/ refuse
Turkey	31,1	26,0	30,1	16,8	13,9	4,3	11,2	9,8	7,3
SEE	29,6	35,2	31,3	17,9	9,9	2,5	9,6	16,4	5,4

In general, when do you expect the accession of your country to the EU to happen?

	By 2020	By 2025	By 2030	Never	DK/refuse
Turkey	10,1	13,2	12,0	33,5	31,1
SEE	18,7	23,4	14,3	27,8	15,9

When it comes to the Turks' perception of problems in the SEE region, most respondents do not consider themselves informed enough to assess the situation (32%). The remainder are divided between those that see the economic situation (18%), terrorism and security (15%), and unemployment (12%) as key regional issues.

Different perceptions of problems in the SEE region between the two populations are most obvious with regards to the economic situation (Turkey: 16%; SEE: 28%), unemployment (Turkey: 12%; SEE: 33%), and corruption (Turkey: 2%; SEE: 10%), all perceived as significantly more important for the region by the SEE population than by their Turkish counterparts. At the same time, terrorism and refugees are seen as much bigger threats by Turks than they are by people of the region itself. This is clearly attributable to the projection of own concerns onto the region rather than the awareness of the SEE security situation by the Turkish respondents.

With regards to the status of relations within the SEE region over the past 12 months, 40% of Turkish respondents do not know enough to answer that question. 32% of respondents feel that relations have improved while 27% disagree.

On the related issue of satisfaction with the level of information available on developments in other parts of the SEE region, about a third of the Turkish population (37%) do not know the answer to the question. The remaining respondents are almost evenly divided between satisfied (22%), dissatisfied (18%) and neutral (23%).

However, the people of Turkey overwhelmingly feel that regional cooperation can contribute to national political and economic prosperity (54%).

The Turkish population is more likely than the SEE population to consider the issue of integration of Roma more important for regional cooperation (Turkey - mean: 2.78; SEE - mean: 2.59) than for EU accession (Turkey - mean: 2.66, SEE - mean: (2.65).

When it comes to the European Union, the prevailing opinion is similar to the average of the seven SEE economies: 43% think that EU membership is a good thing, 21% share the opposite opinion, while 34% are neutral. The largest number of Turkish people (34%) think that Turkey will never become a member of the EU, despite its candidate status, and only 10% think it will happen by 2020.

Turks associate EU membership primarily with freedom to travel (31%), economic prosperity (30%), and freedom to work and study in the EU (26%). Compared to the SEE region, the people of Turkey are more likely to see the benefits of EU membership in social protection (Turkey: 14%; SEE: 10%), gender equality (Turkey: 4%; SEE: 3%). However, they are also more likely to associate EU membership with a loss of sovereignty (Turkey: 11%; SEE: 10%). On the other hand, the SEE population, to a greater extent, associates EU membership with freedom to study and work (Turkey: 26%; SEE: 35%), but also has a higher proportion of respondents negative towards prospective membership (Turkey: 10%; SEE: 16%).

Table 19: Turkey - Unemployment and risk of poverty

How would you estimate your current socio-economic status?

	Above the average	Average (as majority)	Below the average	DK/refuse
Turkey	6,6	63,9	22,0	7,5
SEE	3,9	67,8	26,8	1,5

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

	Yes	No	DK/refuse
Turkey	80,0	18,1	1,9
SEE	88,2	7,3	4,5

What is your current working status?

	Employed	Self-employed	Moonlighting	Unemployed	Housewife	Retired	Student/pupil
Turkey	39,0	10,1	0,1	4,2	19,3	16,1	11,1
SEE	37,7	4,8	3,2	18,1	4,6	24,3	7,2

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

	Private sector employment	Public sector employment
Turkey	83,7	16,3
SEE	69,0	31,0

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

	Not confident at all	Not very confident	Fairly confident	Very confident	DK/refuse
Turkey	5,4	30,5	43,3	12,3	8,5
SEE	5,4	15,1	42,1	32,0	5,4

How many people in your family, who are able to work, are employed?

	4 people and more	3 people	2 people	1 person	0 people	DK/refuse
Turkey	3,4	11,7	39,3	29,6	14,2	1,7
SEE	3,3	9,3	33,9	29,2	23,7	0,7

How many people in your family who are able to work are unemployed?

	4 people and more	3 people	2 people	1 person	0 people	DK/refuse
Turkey	0,9	2,3	10,6	27,1	58,6	0,4
SEE	1,6	5,7	16,3	29,2	46,1	1,0

When it comes to social status and employment in Turkey, there are fewer persons who assess their socio-economic status as below average (Turkey: 22%; SEE: 27%) and slightly more of those whose socio-economic status is above average (Turkey: 7%; SEE: 4%). There are significantly more self-employed persons (Turkey: 10%; SEE: 5%), as well as housewives (Turkey: 19%; SEE: 5%). In contrast, there are notably more pensioners in the SEE region (Turkey: 16%; SEE: 24%) as well as the unemployed (Turkey: 4%; SEE: 18%).

Although respondents from Turkey are more concerned about terrorism and security than about unemployment in their economy, there were significantly more of those who were not confident in keeping their current job (Turkey: 36%; SEE: 21%). Among those who are able to work, the most common are families that have either one (30%) or two employed members (39%) whereas 14% of the families have no employed members among those able to work. 59% of households have no unemployed members among those who are able to work, a higher percentage than in the SEE region where that percentage is 46%. The population of Turkey is less likely than the SEE population to perceive the gap between the poor and the rich as growing in their economy (Turkey: 80%; SEE: 88%). Nonetheless, the perception is widespread which points to the global nature of the widening gap.

Whether each of the following situations has happened to you, as result of the economic crisis in the past three years?

	Yes	No	I do not know	
Someone from your family, a relative, or a friend lost their job?				
Turkey	30,8	67,5	1,7	
SEE	48,5	48,0	3,5	
One of your colleagues lost their job?	Yes	No	I do not know	I do not work - I do not have colleagues
Turkey	23,0	50,5	8,3	18,1
SEE	33,1	38,9	4,4	23,6
You lost your job?				
Turkey	14,2	85,8	0,0	0,0
SEE	12,6	62,9	1,7	22,8

Did your household face any of the following problems (even at least once) during the past 12 months?

	Yes	No	DK/refuse
Unable to pay rent or utility bills?			
Turkey	24,9	74,9	0,1
SEE	22,9	76,0	1,1
Unable to pay instalment on a loan?			
Turkey	29,9	69,6	0,4
SEE	17,9	77,2	4,9
Unable to keep home adequately warm?			
Turkey	24,9	74,9	0,2
SEE	19,4	79,8	0,8
Unable to afford food, clothes and other basic supplies?			
Turkey	14,3	85,6	0,1
SEE	16,8	82,5	0,8
Unable to afford at least one week of holiday away from home (if wanted to)?			
Turkey	45,1	54,0	0,8
SEE	49,4	49,4	1,2
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?			
Turkey	3,0	95,9	1,2
SEE	14,6	84,0	1,4

To what extent do you agree with the following statements?

	Totally disagree	Tend to disagree	Tend to agree	Totally agree	DK/refuse
Some people look down on you because of your income or job situation.					
Turkey	25,2	49,3	20,1	4,1	1,3
SEE	61,8	23,2	9,5	3,5	2,0
I feel there is a risk that I could fall into poverty.					
Turkey	21,7	42,7	28,9	6,2	0,5
SEE	38,1	27,2	21,7	10,2	2,7
You feel left out of society.					
Turkey	26,6	50,2	19,3	3,5	0,4
SEE	59,4	23,8	11,3	3,9	1,6

When asked about job loss, whether it happened to them or to their friends/relatives, there were fewer positive responses in Turkey over the past twelve months: 31% of Turkish respondents' friends or family members have lost their jobs compared to 49% in the SEE region while 23% of their colleagues have lost their jobs compared to 33% in the SEE region. Comparing the likelihood of poverty between Turkey and the SEE region, no major differences are evident with the exception of loan repayment difficulties, which are more prevalent in Turkey (30%) than in the SEE region (18%), as well as problems with heating (25% of respondents in Turkey were not able to keep their home adequately warm compared to 19% in the SEE region).

In terms of remittances, Turkey's population received notably less assistance from abroad than their SEE counterparts (3% in Turkey versus 15% for the SEE).

When it comes to the risk of poverty, about a third of the population of both Turkey (35%) and the SEE region (32%) feel at risk.

In Turkey, there are notably fewer people than in the SEE region who feel left out or excluded (Turkey: 77%; SEE: 83%), as well as those who think that people look down on them because of their financial status (Turkey: 75%; SEE: 85%).

Table 20: Turkey - Employability and the labour market

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

	Having a good education	Working hard	Knowing the right people	Being lucky	Belonging to a wealthy family	Other	DK/refuse
Turkey	44,4	24,2	10,5	9,6	8,2	0,1	3,0
SEE	18,8	25,0	30,8	15,9	7,4	1,3	0,8

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

	Level of one's qualification/education	Professional experience	Network of family and friends in high places	Personal contacts	Ability to adapt	Language skills
Turkey	50,2	34,3	25,0	23,9	16,2	10,4
SEE	31,9	20,2	36,6	49,6	18,8	9,3
	Computer skills	Ethnic affiliation	Willingness to work abroad	None of these	Other	DK/refuse
Turkey	8,8	4,1	2,1	0,3	0,1	2,7
SEE	7,6	1,5	6,7	0,4	1,7	0,9

What are the two main obstacles to those in your household who do not work, to get a good job?

	Inadequate or irrelevant education	Insufficient previous work experience	Do not know the right people	Lack of jobs	Disability	Age discrimination (too old, too young)	Other reason	DK/refuse
Turkey	41,2	33,6	25,4	12,5	8,4	1,6	4,3	9,8
SEE	47,7	14,9	14,2	46,1	21,7	2,6	4,1	4,6

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

	Public sector	Public companies	Private sector	DK/refuse
Turkey	67,4	15,7	13,6	3,3
SEE	43,2	33,2	15,1	8,6

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

	Job is safer	Better working conditions (less overtime job and workload)	Better salary	Better social care and access to health services	Better pension after retirement
Turkey	42,3	33,6	33,4	14,0	12,1
SEE	56,3	36,3	38,9	16,6	16,1

	Better advancement opportunities	Sense of public duty	Opportunities for professional training and development	Other	DK/refuse
Turkey	10,2	8,0	5,6	0,0	0,1
SEE	9,3	5,3	5,0	0,5	0,3

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

	Better salary	Better advancement opportunities	Opportunities for professional training and development	Better working conditions (less overtime job and workload)
Turkey	38,4	36,2	18,8	18,1
SEE	52,5	39,1	18,5	16,9

	Better social care and access to health services	Better pension after retirement	Job is safer	Other	DK/refuse
Turkey	11,3	10,7	7,3	1,9	1,5
SEE	3,9	8,5	20,6	4,3	2,5

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

	Totally disagree	Tend to disagree	Tend to agree	Totally agree	DK/refuse
Turkey	7,7	22,5	53,9	8,5	7,4
SEE	9,1	14,0	38,1	24,6	14,3

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

	I will not for sure	Probably I will not	Probably I will	I will for sure	DK/refuse
Turkey	5,4	8,5	36,2	46,0	3,9
SEE	5,7	8,5	37,0	46,5	2,3

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

	I will not for sure	Probably I will not	Probably I will	I will for sure	DK/refuse
Turkey	3,9	2,1	27,1	60,1	6,7
SEE	9,8	10,8	35,0	39,8	4,7

Compared to the SEE region, respondents in Turkey display a different set of opinions and preferences when it comes to their perception of key factors influencing success and job prospects. Education is much more important, with a majority of 44% of Turks convinced of the important relationship between education and progress in life against only 19% from the SEE region (for the latter both hard work and informal connections are viewed as more important).

In addition to education, hard work is considered as important (24%) while only 10% feel that knowing the right people and being lucky are instrumental in getting ahead, a significantly smaller proportion than in the SEE region.

On the issue of securing employment, as many as half of the people in Turkey believe that education is key compared to only 32% in the SEE region. The second most important asset is professional experience (34%), followed by a network of family and friends in high places (25%) and personal contacts (24%). In the SEE region, personal contacts (50%) and the network of family and friends in high places (37%) are routinely ranked as most important for job seekers.

There are marked differences in the perception of the main barrier to employment. While both Turkey and the SEE region perceive the lack of jobs in general as most problematic (Turkey: 41%; SEE: 48%), there is disagreement over the second most important barrier is inadequate education (34%) while for the SEE region it is not knowing the right people (46%). Although only 16% of Turks are employed by the public sector, the respondents are more likely than their SEE counterparts to prefer it as their employer (Turkey: 83%; SEE: 76%) while the interest in the private sector is almost identical (Turkey: 14%; SEE: 15%).

Public sector jobs are preferred for reasons of job security (42%), better working conditions (without overtime) (33%), and a more competitive salary (33%). This is broadly in line with respondent motivations in the SEE region although job security and better salary considerations are more pronounced.

The Turkish population is more likely to opt for private sector jobs for reasons of better salary (38%) and superior advancement opportunities (36%). This is broadly in line with the results of the survey for the SEE region although the latter boasts significantly more respondents who choose the private sector for salary considerations (53%). The difference in terms of job security considerations is as marked (Turkey: 7%; SEE: 21%), whereas better benefits are more commonly referenced in Turkey (Turkey 12%; SEE: 4%).

In Turkey, people are also more likely to believe that the skills learned through the education system meet the needs of their job (Turkey: 30%; SEE: 23%). Both regions boast significant numbers of respondents willing to pursue additional training opportunities in order to advance (Turkey: 82%; SEE 84%). At the same time, the Turkish population is significantly more likely to train with a view to getting a job (Turkey: 87%; SEE: 75%).

Table 21: Turkey - Attitudes towards mobility

Would you consider leaving and working abroad?

	Yes	No	DK/refuse
Turkey	25,4	69,7	4,9
SEE	44,8	49,9	5,2

Would you consider living and working in another place in the SEE region? If yes, where?

	Albania	Bosnia and Herzegovina	Kosovo*	The Former Yugoslav Republic of Macedonia	Montenegro
Turkey	2,9	6,2	3,2	4,1	1,3
SEE	0,7	1,3	3,2	1,1	3,2
	Serbia	Croatia	I would not consider emigrating to other economies in the region		DK/refuse
Turkey	2,0	1,8	non aplicable in Turkey		84,1
SEE	1,9	5,5	81,1		5,8

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

	Albania	Bosnia and Herzegovina	Kosovo*	The Former Yugoslav Republic of Macedonia	Montenegro
Turkey	0,3	2,0	0,9	1,4	0,3
SEE	5,8	9,6	8,7	3,4	10,9
	Serbia	Croatia	No, I did not		DK/refuse
Turkey	0,7	0,4	95,8		0,8
SEE	6,9	7,2	60,8		1,38

What was the purpose of your travel?

	Business	Visiting family	Visiting friends	Leisure	Other
Turkey	28,0	30,0	22,8	47,8	0,0
SEE	13,2	27,2	19,0	57,8	5,9

Do you feel welcome abroad when you are traveling to other cities in SEE region either for business or leisure?

	Yes, in all of the cities in the region	Yes, in some of the cities, and unwelcome in other	No, in any of the cities in the region	I did not visit other cities in the region	DK/refuse
Turkey	3,1	4,9	2,8	74,0	15,3
SEE	40,9	19,1	3,0	31,9	5,1

What do you think about people from other parts of the region coming to live and work in your country?

	Good	Bad	Neither good nor bad	DK/refuse
Turkey	17,7	40,1	39,4	2,8
SEE	26,7	24,1	44,0	5,2

Which tourists would you like to have more in your country, those from the SEE region or from other parts of the world?

	Those from the region	Those from other parts of the world	Both equally	None of them	DK/refuse
Turkey	4,4	10,3	63,8	7,6	13,9
SEE	4,2	24,1	61,8	5,3	4,5

What do you think about refugees coming to live and work in your city?

	Good	Neither good nor bad	Bad	DK/refuse
Turkey	14,9	34,1	47,5	3,5
SEE	12,4	39,0	42,1	6,5

This part of the survey is somewhat complicated by the limited exposure of Turks to the SEE region.

Overall, the people of Turkey are significantly less likely to leave their country to live and work abroad (Turkey: 25%; SEE: 45%).

When it comes to choosing a prospective destination within the SEE region, the largest number (84%) are unable to answer this question while those that can mostly prefer Bosnia and Herzegovina (6%) and The Former Yugoslav Republic of Macedonia (4%).

The SEE region has been visited in the past twelve months by only 4% of the population of Turkey, with Turks visiting Bosnia and Herzegovina (2%) and The Former Yugoslav Republic of Macedonia (1.4%) most frequently. The reason cited by most visitors was leisure (48%). It is interesting that as many as 74% of Turks never visited any of the cities/towns in the SEE region.

As for people coming to live and work in their economy, most Turks either have a negative (40%) or a neutral stance (39%). Only 18% are positive about the arrival of foreigners to Turkey. Compared with the SEE region, there are significantly more people in Turkey whose preference is to exclude foreigners from their economy (Turkey: 40%; SEE: 24%).

When it comes to tourists, Turkish respondents by and large have no preference as to their origin, whether from the region or from other parts of the world (both scored at 64%), similar to the population of the SEE region (62%). The key difference in this regard is that people from the SEE region are significantly more likely to favour tourists from other parts of the world (Turkey: 10%; SEE: 24%).

As for refugees, an issue that has heavily impacted Turkey over the past several years, the opinion of the Turkish population does not much differ from that of the SEE population. In fact, most are negative about refugees (48%), although not significantly more than the SEE population (42%). Only 15% believe that the arrival of refugees to their city is a good thing while 34% are neutral.

Table 22: Turkey - Attitudes to social inclusion of vulnerable groups

The Government should provide affirmative measures - promote opportunities for equal access to the persons belonging to the groups listed below, when applying for a secondary school or university.

	Persons with disabilities	Displaced persons and refugees	Roma population	Other ethnic minorities
Turkey	3,12	2,54	2,49	2,46
SEE	3,50	2,97	2,99	3,02

The Government should provide affirmative measures - promote opportunities for equal access to the persons belonging to the groups listed below when applying for a public sector job

	Persons with disabilities	Displaced persons and refugees	Roma population	Other ethnic minorities
Turkey	3,13	2,52	2,46	2,44
SEE	3,45	2,84	2,90	2,94

The Government should do more in order to ensure better housing conditions belonging to the groups listed below

	Persons with disabilities	Displaced persons and refugees	Roma population	Other ethnic minorities
Turkey	3,17	2,68	2,61	2,57
SEE	3,50	2,93	2,86	2,90

Compared to the SEE, the Turkish population is less likely to support their government when it comes to all three measures across all four groups.

Respondents from Turkey mostly approve of the government's role in ensuring equal conditions for enrolment in school/university, employment or better housing conditions for persons with disabilities, as is the case with the SEE region.

Of all the listed measures, they are most supportive of the government when it comes to providing better housing conditions for the vulnerable. Other, less popular measures, are almost equally supported by the respondent population.

Table 23: Turkey - Perceptions on trade

How would you describe commercial and trade links with SEE region?

	Should be improved	Just about right	They are already too strong	DK/refuse
Turkey	49,5	10,2	8,5	31,9
SEE	51,9	26,1	7,4	14,5

Do you agree that in general entering of foreign companies in the market of your country will improve the situation for consumers like you?

	Totally disagree	Tend to disagree	Tend to agree	Totally agree	DK/refuse
Turkey	8,6	17,2	50,6	6,1	17,5
SEE	9,7	20,9	46,9	11,8	10,7

Do you agree with the following statements?

	Totally disagree	Tend to disagree	Tend to agree	Totally agree	DK/refuse
Products and goods of my economy can compete well with products and goods from other SEE economies					
Turkey	2,9	8,8	50,7	29,4	8,1
SEE	2,0	6,0	31,2	58,7	2,07
Products and goods of my economy can compete well with products and goods from the EU					
Turkey	4,5	12,7	49,9	24,0	8,9
SEE	4,1	12,3	34,5	47,1	2,1

	Domestic products	Product from SEE economies	Products from Western European countries	DK/refuse
If you could choose a food or beverage product from three different sources: domestic product, product from SEE region and product from Western European countries, which one would be your FIRST CHOICE?				
Turkey	93,1	1,5	5,4	0,0
SEE	77,8	9,0	12,9	0,2
Which one would be your SECOND CHOICE?				
Turkey	4,7	51,3	28,1	15,8
SEE	8,1	41,7	44,8	5,4

	Never	Rarely ever	Sometimes	Frequently	Always	DK/refuse
When purchasing products in supermarkets, how often do you look at the labels to see the country of origin?						
Turkey	19,6	25,0	32,4	16,2	6,2	0,6
SEE	16,3	20,9	32,5	20,5	9,4	0,5

When procuring products and services, should your Government give priority to local suppliers or should they be treated the same as foreign suppliers (provided price and quality is equal)?

	Local suppliers should be given priority	Local suppliers should be treated the same as foreign suppliers	DK/refuse
Turkey	73,9	16,6	9,5
SEE	73,5	21,3	5,2

To what extent do you think that you are informed about the regional free trade agreement (CEFTA 2006)?

	Not informed at all	Slightly informed	Mostly informed	Completely informed	DK/refuse
Turkey	41,7	33,3	2,1	1,1	21,9
SEE	55,9	30,6	8,4	1,3	3,8

The people of Turkey have a very similar position on trade links with the region as the people of the seven SEE economies: they mostly believe that they should be improved (50%), 10% think that they are at the right level while 9% think them excessive.

The respondents' opinions across the two surveys, regarding the positive impact of foreign companies entering the market on consumers, is likewise similar (Turkey: 57%; SEE: 59%).

The Turkish population considers domestic products competitive both in the SEE region (80%) and on the EU market (74%), with their competitiveness in the SEE region somewhat more pronounced. In comparison, the SEE population considers domestic products more competitive both in the SEE region (90%) and on the EU market (82%).

When purchasing products in supermarkets, more than half the population of Turkey (55%) at least sometimes look at the labels to check the origin of the product versus 62% in the SEE region.

As is the case with the SEE population, Turks mostly prefer locally sourced food and beverages, 93% choose domestic products, which is significantly more prevalent than in the SEE region where 78% choose domestic products. On the other hand, when it comes to first choice, the SEE population is significantly more likely to choose a product from Western Europe (Turkey: 5%; SEE: 13%) or a product from the SEE region (Turkey: 2%; SEE: 9%).

With regard to second choice for food and beverages, people from Turkey more often choose a product from the SEE region (51%) while the SEE population chooses Western Europe (45%). Although respondents from both the SEE region and Turkey support prioritizing domestic suppliers when awarding government contracts to an identical extent (Turkey: 74%; SEE: 74%), the SEE boasts a higher proportion of respondents who feel that all suppliers should be treated equally (Turkey: 17%; SEE: 21%).

The Turkish population is poorly informed about CEFTA: only 37% describe themselves as informed, of which 33% are slightly informed. At the same time, the SEE is home to a significantly larger proportion of respondents who consider themselves not informed at all (Turkey: 42%; SEE: 56%).

Table 24: Turkey - Perceptions on transport and infrastructure

Does your household own a car (please, do not count company car)?

	Yes, one car	Yes, two cars	Yes, three or more	No	DK/refuse
Turkey	41,8	1,7	0,5	55,7	0,4
SEE	58,6	7,8	1,0	32,2	0,3

How often do you use public transportation?

	Every day/ mostly every day	A few times a week (2-3)	A few times during one month	Seasonal (for example only during the winter)	Never/ almost never	DK/refuse
Turkey	34,5	36,8	19,7	1,1	6,8	1,1
SEE	14,3	13,4	21,3	9,4	41,0	0,6

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

	Automobile	Bus	Airplane	Train	Other	I did not travel outside of my place of residence in the past 12 months	DK/refuse
Turkey	21,5	50,9	10,1	0,8	0,3	14,8	1,6
SEE	53,4	35,2	0,9	1,4	0,9	7,5	0,6

How do you estimate the quality of transport infrastructure and connections within your economy?

	Very poor	Poor	Good	Very good	Excellent	DK/refuse
Turkey	3,3	20,6	58,5	10,9	4,9	1,8
SEE	8,3	29,8	46,3	11,2	2,3	2,2

How do you estimate the quality of transport infrastructure and connections within SEE region?

	Very poor	Poor	Good	Very good	Excellent	DK/refuse
Turkey	1,3	6,8	29,7	6,2	2,3	53,7
SEE	4,5	19,1	42,8	11,5	1,7	20,3

Would you agree that travelling by road in your country is safe?

	Totally disagree	Tend to disagree	Tend to agree	Totally agree	DK/refuse
Turkey	4,3	19,3	66,8	7,1	2,5
SEE	13,0	31,2	47,9	5,4	2,5

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

	Roads	Railroads	Air travel	Waterway transport	None of the above - I do not travel	DK/refuse
Turkey	58,9	12,7	15,5	2,2	0,9	9,7
SEE	74,7	15,8	3,1	0,7	3,0	2,6

People from Turkey are significantly less likely than their SEE counterparts to own a car: as many as 56% of households do not have a car against 32% in the SEE region. In this respect, Turkey is most similar to Albania (55%).

Public transportation is used by 92% of people in Turkey (58% in the SEE region). Most people use it a few times a week (37%) or even daily (35%). In both cases, it is significantly more used than in the SEE region (every day: 14%; 2-3 times a week: 13%). This is related to both the fewer number of private vehicles owned by Turks but also a more developed public transport system.

When travelling outside of their place of residence, Turks mostly use the bus (51% in Turkey against 35% in the SEE) while the car remains the most common mode of transport for the SEE (54%).

Of all the economies in the SEE region, only Albania uses the bus (52%) more often than the automobile (42%) as means of travel. 15% of the Turkish population have not travelled outside of their place of residence in the past twelve months.

People from Turkey estimate their transport infrastructure as significantly better than their SEE counterparts (Turkey: 74%; SEE: 60%).

When assessing transport infrastructure and connectivity in the SEE region, more than half (54%) of respondents in Turkey are not able to answer that question which is not surprising considering that a large part of the population has never been to the SEE region. The rest mostly assess transport infrastructure as good (30%).

Three quarters of the Turkish population consider travelling by road in Turkey to be safe, which is a significantly higher number compared to the estimates about road safety in the SEE region (53%).

Given that a large part of the Turkish population consider that their roads are safe for travel, there are comparatively fewer respondents than in the SEE who feel that improvement in roads would have a beneficial impact on their travelling (Turkey: 59%; SEE: 75%). People from Turkey are more likely than the SEE population to see greater benefit in improvements in air travel (Turkey: 16%; SEE: 3%).

Table 25: Turkey - Attitudes towards climate change and energy

Is climate change a problem?

	Very serious problem	Somewhat serious problem	Not too serious problem	Not a problem at all	DK/refuse
Turkey	51,0	23,4	6,8	8,1	10,7
SEE	36,2	36,7	15,2	6,9	5,0

In your opinion, who within your economy is responsible for tackling climate change?

	Governments	Business and Industry	You personally	Regional and local authorities	NGOs (Environmental groups….)	All of them	None	DK/refuse
Turkey	26,9	20,4	15,4	11,1	9,6	46,9	3,0	5,0
SEE	18,9	20,1	3,0	10,5	12,1	40,5	7,8	12,7

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

	Totally disagree	Tend to disagree	Tend to agree	Totally agree	DK/refuse
Turkey	3,0	17,7	60,3	12,8	6,2
SEE	11,5	21,3	45,5	14,2	7,5

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

	You try to reduce your waste and you regularly separate it for recycling	You buy locally produced and seasonal food whenever possible	You try to cut down on your consumption of disposal items whenever possible	When buying a new household appliance, you choose it mainly because it was more energy efficient than other models	You have insulated your home better to reduce your energy consumption	You have bought a new car and its low fuel consumption was an important factor in your choice
Turkey	52,7	49,2	35,3	32,4	23,3	12,7
SEE	31,5	44,6	32,7	23,4	17,9	14,3

	You regularly use environmentally friendly alternatives to using your private car such as walking, biking, public transport	You avoid taking short-haul flights whenever possible	You have switched to an energy supplier which offers a greater share of energy from renewable sources than your previous one	You have installed equipment in your home	You have bought a low energy home	None	Do not know
Turkey	9,9	7,5	3,1	2,8	1,2	11,4	1,7
SEE	15,3	4,2	1,6	2,1	0,8	21,1	4,2

The SEE population perceives climate change as a problem to a slightly greater extent than the people of Turkey do (Turkey: (1.69; SEE: 1.92), even though a larger proportion of people in Turkey consider climate change to be a very serious problem (Turkey: 51%; SEE: 36%). Turks believe that all the listed institutions share responsibility for tackling climate change (47%), followed by those that hold the government primarily responsible (27%). People from Turkey are significantly more likely than their SEE counterparts to acknowledge they are personally responsible for tackling climate change (Turkey: 15%; SEE: 3%).

In Turkey, there is a markedly greater percentage of the population willing to buy environmentally friendly products even if they are more expensive (Turkey: 73%; SEE: 60%). More than half of the population of Turkey (53%) regularly separate waste for recycling compared to 32% in the SEE region. Almost half of respondents in Turkey (49%) buy local produce whenever possible and about a third avoid disposable plastic bags and similar products, while also choosing energy-efficient household appliances. All of the mitigation actions are taken to a greater extent in Turkey than in the SEE region, except for biking, walking and the like (Turkey: 10%; SEE: 15%). The Turkish population is committed to protecting the environment to a significantly greater extent given that only 11% have not taken any of the listed actions versus 21% in the SEE.

Table 26: Turkey - Perceptions on Public Institutions and Services

Have you been in contact with public services in the last year?

	Yes	No
Turkey	42,7	57,3
SEE	66,9	33,1

If yes, whether these were central or local government services? (Only those who have been in contact with public services - N=4611)

	Central government services	Local government services
Turkey	45,6	89,2
SEE	61,1	75,2

How would you grade the following issues:

	Very poor	Poor	Good	Very good	Excellent	DK/refuse
Transparency of public services (school, police, health system, judiciary, public transport, etc.)?						
Turkey	5,4	19,3	49,6	16,8	6,9	2,1
SEE	9,7	27,2	45,3	12,1	2,7	3,0
Time required to get information from public sector (data which public authorities have such as documents, registers, records, etc.)?						
Turkey	4,3	20,6	49,9	14,3	8,3	2,5
SEE	14,0	32,5	37,9	9,5	2,2	3,9
Treatment of citizens in public sector (police, health system, judiciary, township, etc.)?						
Turkey	8,1	19,3	47,6	16,6	6,8	1,6
SEE	10,8	30,2	41,0	13,5	2,4	2,1
Time required to obtain public services (police, health system, judiciary, township, etc.)?						
Turkey	4,6	22,1	47,3	16,7	7,2	2,1
SEE	13,2	32,7	38,0	11,2	2,2	2,6
Price of public services (e.g. issuance of personal documents, judiciary costs, etc.)?						
Turkey	5,4	21,0	44,8	19,6	7,2	1,9
SEE	18,4	35,6	32,9	7,9	1,6	3,6

Agreement with the statements:

	Totally disagree	Tend to disagree	Tend to agree	Totally agree	DK/refuse
Requests for information held by a government agency are granted in timely manner?					
Turkey	8,4	29,4	51,5	7,7	3,1
SEE	14,5	33,6	35,1	3,4	13,37
The information provided by a government agency is pertinent and complete?					
Turkey	5,4	22,1	58,2	10,9	3,4
SEE	12,7	32,8	37,3	4,6	12,6
Requests for information by a government agency are granted at a reasonable cost?					
Turkey	6,8	29,9	50,1	9,7	3,6
SEE	16,9	34,8	30,9	3,2	14,1
The administrative procedures in public institutions are efficient.					
Turkey	5,9	22,1	56,2	7,4	8,4
SEE	17,0	35,2	38,8	3,7	5,3
The law is applied and enforced effectively.					
Turkey	10,3	28,9	49,3	8,0	3,5
SEE	33,1	40,4	21,6	2,0	2,9
The law is applied to everyone equally.					
Turkey	16,8	31,8	42,0	6,2	3,3
SEE	47,2	35,6	13,5	1,6	2,2

The SEE population have had contact with public service providers to a significantly greater extent than their counterparts from Turkey over the past twelve months (Turkey: 43%; SEE: 67%). There is a significant difference between the two with regard to the institutions that have been contacted. Central government organisations have been contacted to a significantly greater extent in the SEE region than in Turkey (Turkey: 46%; SEE: 61%) where local government services have been contacted much more frequently (Turkey: 89%; SEE: 75%). This is in large part attributable to the size of Turkey and its administrative apparatus with many services decentralized.

The majority (over 70%) of the Turkish population rated all the surveyed aspects as good/

very good/excellent, although they mostly rated them as good (from 45% to 50%). All aspects were rated significantly better in Turkey than in the SEE region where the number of those who rated them as good, very good or excellent ranges from 42% to 60%.

The information provided by government agencies were rated as significantly better by respondents from Turkey than in the SEE region. Most agree with the statement that information provided is complete and pertinent (Turkey: 69%; SEE: 42%) and slightly fewer agree with the statement that the information is granted in a timely manner (Turkey: 59%; SEE: 39%) and that prices are reasonable (Turkey: 60%; SEE: 34%).

There are marked differences in the opinions between the respondents from Turkey and their counerparts from the SEE region with regard to the application of law. 57% of the Turkish population believe that the law is applied and enforced effectively in their economy against only 24% in the SEE region. In addition, nearly half the population (48%) of Turkey believe that the law is applied to everyone equally while only 15% in the SEE share this opinion.

Almost two thirds of the population of Turkey (64%) consider the administrative procedures in public institutions effective against only 43% in the SEE region.

How much trust do you have in certain institutions:

	Totally distrust	Tend not to trust	Tend to trust	Totally trust	DK/refuse
Courts and judiciary					
Turkey	6,3	30,3	49,9	11,1	2,4
SEE	29,5	38,3	25,7	2,3	4,2
Parliament					
Turkey	10,1	30,8	48,2	8,8	2,1
SEE	31,6	38,9	22,7	2,7	4,1
Government					
Turkey	10,4	24,5	49,1	13,6	2,3
SEE	32,3	36,6	23,7	3,5	3,9
Ombudsman					
Turkey	8,6	27,1	50,9	8,4	4,9
SEE	22,2	32,8	30,5	5,0	9,5
Supreme audit institution					
Turkey	8,9	26,8	47,8	11,5	5,1
SEE	23,7	33,9	27,3	3,9	11,2

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

	Totally disagree	Tend to disagree	Tend to agree	Totally agree	DK/refuse
Judicial system					
Turkey	11,5	30,9	44,1	10,6	2,9
SEE	39,5	37,6	15,4	2,9	4,67
Ombudsman					
Turkey	13,5	28,8	43,7	9,6	4,4
SEE	29,4	35,1	23,3	4,5	7,7
Supreme audit institution					
Turkey	13,4	26,9	44,6	10,3	4,8
SEE	31,4	35,0	21,0	4,0	8,7
Media					
Turkey	20,1	34,7	35,8	6,6	2,8
SEE	33,4	36,3	20,3	4,4	5,6

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

	Totally disagree	Tend to disagree	Tend to agree	Totally agree	DK/refuse
Parliament					
Turkey	11,9	27,1	50,1	8,2	2,7
SEE	22,7	33,9	28,7	8,3	6,4
Ombudsman					
Turkey	11,8	25,6	48,2	9,9	4,5
SEE	18,5	31,1	31,3	9,5	9,5
Supreme audit institution					
Turkey	11,5	24,6	48,5	11,0	4,4
SEE	19,3	31,3	28,9	9,6	10,9
Citizens and civil society organisations					
Turkey	8,2	24,8	52,8	10,4	3,8
SEE	16,9	28,2	34,3	12,1	8,6
Media					
Turkey	16,5	34,4	40,8	5,5	2,8
SEE	19,0	31,6	31,5	10,6	7,3

The population of Turkey has a high level of trust in all of the five surveyed institutions, with confidence ranging from 57% to 61%. The most trusted is the government (63%) and the least trusted is parliament (57%). Compared with the SEE region, there is significantly greater trust in all five institutions: the judiciary, government, parliament, ombudsman and supreme audit institution. Only 25% of the SEE population trust parliaments while the highest level of trust is enjoyed by the ombudsman with 36%.

The discrepancy is evident with regards to views on politicization of institutions. Respondents in Turkey are significantly more likely to believe that the judicial system, the ombudsman, supreme audit institution and the media are independent from political influence (judicial system: Turkey: 55%; SEE: 18%; ombudsman: Turkey: 53%; SEE: 28%; media: Turkey: 42%; SEE: 25%; supreme audit institution: Turkey: 55%; SEE: 25%). It is interesting to note that the Turkish population believes that the media are the least independent from political influence while the SEE population believes that for the judicial system (only 18%).

Over half the population of Turkey believe that all of the listed institutions have a critical attitude towards the government and that they make it accountable to the citizens. The citizens and civil society organizations (63%) are most likely to have a critical attitude towards the government while the media are perceived as least likely (46%).

The Turkish population is significantly more likely than the SEE population to believe that all institutions, with the exception of media, have a critical attitude towards the government and that they make it accountable to the citizens.

Table 27: Turkey - Perception of corruption

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

	Yes	No	DK/refuse
Educational system			
Turkey	3,1	92,9	4,0
SEE	3,1	94,4	2,4
Judiciary			
Turkey	0,7	93,3	6,0
SEE	3,2	93,9	2,9
Medical and health services			
Turkey	1,7	93,2	5,1
SEE	12,0	84,8	3,2
Police			
Turkey	1,2	92,7	6,2
SEE	4,2	92,9	2,9
Registry and permit services			
Turkey	1,3	93,1	5,6
SEE	2,0	95,0	3,1
Utilities			
Turkey	1,2	93,7	5,1
SEE	2,4	94,6	3,0
Tax revenues			
Turkey	1,3	93,6	5,1
SEE	2,4	94,4	3,2
Land services			
Turkey	0,4	94,7	4,8
SEE	2,1	94,6	3,3
Any government agency			
Turkey	0,8	93,8	5,4
SEE	1,8	94,5	3,7

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

	Customs	Political parties	Parliament	Military	NGOs	Media	Religious bodies
Turkey	1,9	2,96	2,90	2,77	2,93	3,01	2,88
SEE	3,3	3,35	3,19	2,46	2,78	3,03	2,55

	Business/ private sector	Education system	Judiciary	Medical and health services	Police	Public officials/ civil servants
Turkey	2,89	2,91	2,32	2,73	2,81	3,00
SEE	2,89	2,88	3,26	3,20	3,11	3,10

To what extent do you agree or not agree with the next statement? (scale from 1 to 10)

	In public sector most people can succeed if they are willing to work hard	Hard work is no guarantee of success in public sector as for most people it is more a matter of connections
Turkey	7,11	6,74
SEE	5,08	7,27

Agreement with the statements:

	Totally disagree	Tend to disagree	Tend to agree	Totally agree	DK/refuse
Written government information in your country (such as laws, decisions, web pages, forms) is overall easy to understand and uses plain language?					
Turkey	6,7	20,5	55,6	5,7	11,5
SEE	16,9	27,8	34,5	5,2	15,6
in your economy the government fights corruption effectively?					
Turkey	14,1	22,7	50,0	8,6	4,6
SEE	37,5	34,9	20,0	3,0	4,6

Although less than 10% of the population in both the SEE region and Turkey paid a bribe to one of the surveyed institutions, the practice of bribing seems to be more prevalent in the SEE region than in Turkey, especially when it comes to medical and health services (Turkey: 2%; SEE: 12%). The Turkish population is most likely to bribe someone in the education system (3%).

People from Turkey believe that the media and public officials are the most corrupt while the SEE population singles out political parties and customs officers.

Of all the surveyed categories, the population of Turkey, compared with the SEE population, consider the military (Turkey: 2.77; SEE: 2.46), NGOs (Turkey: 2.93; SEE: 2.78) and religious bodies (Turkey: 2.88; SEE: 2.55) to be more corrupt while all other institutions are seen as more corrupt in the SEE region. There are no notable differences between Turkey and the SEE economies when it comes to corruption of the media, business/private sector, education system and public officials.

People in Turkey are more likely to attribute success in the public sector to hard work (mean: 7.11) as opposed to connections (mean: 6.74). The majority of respondents from the SEE region share the opposite opinon and consider connections (mean: 7.27) more important than hard work (mean: 5.08).

The Turkish population is significantly more likely to find written government information easy to understand and in plain language (Turkey: 61%; SEE: 40%).

Over half of the population of Turkey (59%) think that their government is effective in combating corruption while only 23% of the SEE population share that opinion of their own government.

Table 28: Turkey - Participation in decision making

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

	Yes, I did, I took part in public debates	Yes, I did, I took part in protests	Yes, I did, I gave my comments on social networks or elsewhere on the Internet	I only discussed about it with friends, acquaintances, I have not publicly declared myself	I do not even discuss about it	DK/refuse
Turkey	4,5	8,9	15,5	15,7	45,2	17,8
SEE	3,1	7,8	5,2	35,4	45,4	6,3

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=5403)

	I as an individual cannot influence government decisions	I do not want to be publicly exposed	I do not care about it at all	DK/refuse
Turkey	57,9	20,1	5,0	17,1
SEE	47,2	23,6	22,5	6,7

There are notably more people in Turkey than in the SEE region who have taken some action that could affect the government's decision, be it participation in mass protests (Turkey: 9%; SEE: 8%), taking part in debates (Turkey: 5%; SEE: 3%), or commenting on social networks (Turkey: 16%; SEE: 5%). There is an equal number of those who do not discuss government decisions (45%) while there are more people in the SEE region who only discuss them with friends and acquaintances (Turkey: 16%; SEE: 35%).

The Turkish population is significantly more likely than their SEE counterparts to cite their belief that individuals cannot make a difference as the explanation for their non-involvement (Turkey: 58%; SEE: 47%) while there are significantly more of those in the SEE region who do not care about the process at all (Turkey: 5%; SEE: 23%).

FOCUS ON TURKEY: CONLUSIONS AND RECOMMENDATIONS

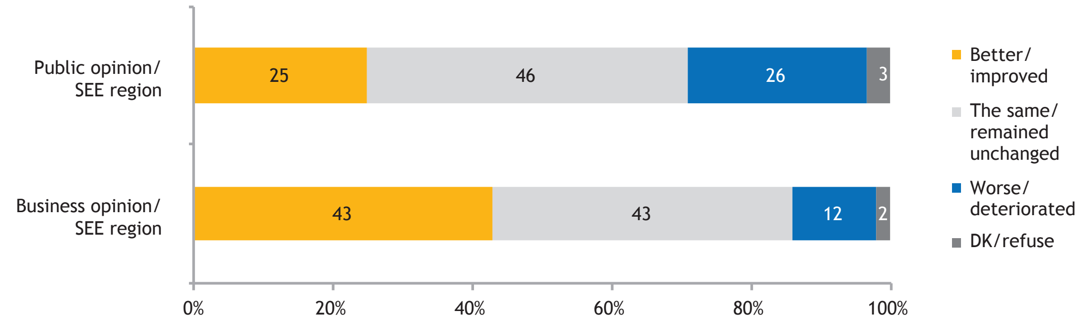
The main takeaway from the comparative review of Turkey and the SEE region is that the former is ahead in development by most indicators. The overall prospects are also better in Turkey than in the SEE. Finally, Turkey is more supportive of regional and EU integrations than many SEE economies, even though regional cooperation is not a priority and EU accession is highly unlikely.

Business Opinion v.s. Public Opinion

Given that the Balkan Barometer Survey targets two different population groups, namely the business community and the general public, it is interesting to compare the views of the two groups across the same topics. This part of the report provides a comparative viewpoint of the issues and topics set in the same form for both groups.

Figure 96:
How do you expect the general economic situation in your place of living to develop over the next 12 months? Will it mostly deteriorate, remain unchanged or improve?
(Business opinion - N=1430, %)

What are your expectations for the national economy? Do you think that in 12 months the state of the economy will be:
(Public opinion - N=7026, %)



The private sector is much more optimistic about the economic outlook for the SEE region (43% see the situation improving) while the public at large harbours serious reservations (only 25% think it will get better).

Roughly the same number of respondents from both groups expect the situation to remain unchanged over the next 12 months (Business: 43%, Public: 46%) while the differences in outlook become more pronounced within the group who expect the situation to deteriorate; 26% of the population expect to see a worsening in the economic situation while only 12% of the business sector share the gloomy forecast.

Table 29: Do you agree that regional cooperation can contribute to the political, economic or security situation of your economy?/ How important is the quality of regional cooperation in SEE to your business?

Business Opinion		Public Opinion	
How important is the quality of regional cooperation in SEE to your business? (N=1430; %)		Do you agree that regional cooperation can contribute to the political, economic or security situation of your country? (N=7026; %)	
Not important at all	24	Totally agree	6
Not very important	24	Tend to agree	13
Important	36	Tend to disagree	51
Very important	16	Totally disagree	22
DK/refuse	1	I don't know/refuse to answer	8

How important is the quality of regional cooperation to business? To what extent do people believe that regional cooperation can contribute to the prosperity of their economy?

The business community affords less importance to regional cooperation compared to the general public. In fact, a litle over a half of the business community (52%) consider the quality of regional cooperation to be important for their business whereas 73% of the general public agree that regional cooperation can contribute to political stability and economic prosperity.

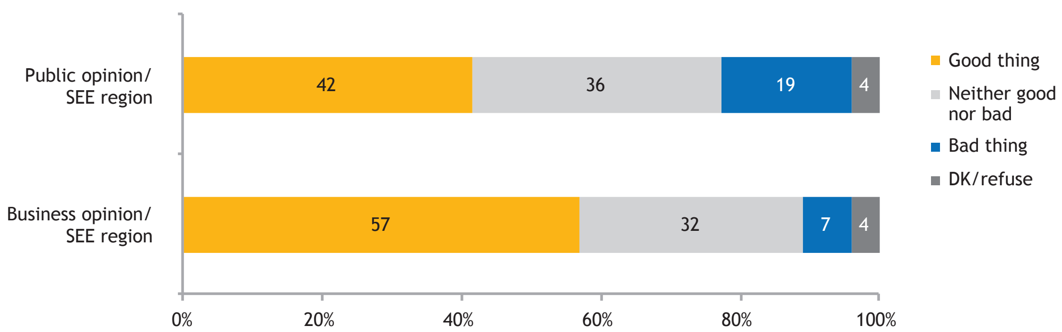
Figure 97:

Do you think that EU membership would be (is - for Croatia) a good thing, a bad thing, or neither good nor bad?

(Public opinion - N=7026, %)

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

(Business opinion - N= 1430,%)



The business community is more aware of the benefits of accession to the European Union compared to the general public. In fact, just over half (57%) of surveyed businesses believe that EU membership will have a positive impact on their company and only 7% think it would be bad for business. When it comes to the general public, there is a significantly smaller number of respondents who see EU membership as a good thing (42%), and as many as 19% consider it a bad thing.

Looking at the inidividual economies, Kosovo* and Albania are most aware of the benefits of EU accession, across both the business community and the general public. Serbia, on the other hand, boasts the lowest number of respondents in both groups who see EU accession as beneficial (Business: 40%, Public: 26%). The number of business people with a positive impression of the EU has increased over the past several years with the EU becoming an export market and a source of revenue.

The public, however, is still to fully appreciate the tangible effects of prospective EU membership or of the approximation process itself, especially where local and regional issues must be aligned with EU policy. This is particularly the case with larger economies, irrespective of likelihood of membership in the near future.

Table 30: If you prefer to work in public sector, what is the main reason for that?/ In your opinion, what is the main reason why someone prefers to work in public sector?

(Top 3 reasons)

Business Opinion		Public Opinion	
In your opinion, what is the main reason why someone prefers to work in public sector? (N=1430, only one answer, %).		If you prefer to work in public sector, what is the main reason for that? (those who preferred work in public sector - N=5501, maximum two answers, %)	
Job is safer	49	Job is safer	56
Better working conditions (less overtime job and workload)	19	Better working conditions (less overtime job and workload)	36
Better salary	17	Better salary	39

This part of the report looks at the views of the public at large and those of the business community on the issue of employment in the public sector.

The Public Opinion Survey indicates that most of the SEE population prefers to work in the public sector (76%). The companies surveyed in the Business Opinion Survey, all exclusively private, largely share the opinion of the public respondents as to why respondents overwhelmingly go for public employers. Both groups of respondents believe that job security is the primary motivator, followed by better salaries, with superior working conditions coming in third.

The business respondents believe that superior working conditions and better salaries are almost equally important in choosing employment in the public sector (working conditions: 19%; better salary: 17%).

The public sector provides greater security, but slower advancement and fewer salary increases, with the opposite true for the private sector. The attractiveness of public jobs tends to spike in times of high unemployment and economic uncertainty and this is largely what the findings of this section can be attributed to.

Table 31: If you prefer to work in private sector, what is the main reason for that?/ And why does someone rather choose to work in private sector?

Business Opinion		Public Opinion	
And why does someone rather choose to work in private sector? (N=1430, only one answer, %).		If you prefer to work in private sector, what is the main reason for that? (those who preferred work in private sector - N=1057, maximum two answers, %)	
Better salary	38	Better salary	52
Better advancement opportunities	22	Better advancement opportunities	39
Job is safer	6	Job is safer	21
Better working conditions (less overtime job and workload)	4	Better working conditions (less overtime job and workload)	17
Better education opportunities	11	Better education opportunities	19
Better pension after retirement	4	Better pension after retirement	16

When it comes to reasons to choose employment in the private sector, both the business community and the general public recognize a similar set of advantages, such as better salary and superior advancement opportunities.

However, both reasons are significantly more prevalent among the general public (as many as 52% of the population reference better salary as the reason to work in the private sector compared to 38% of the business community). Better education opportunities are ranked in third place by both groups (business community: 11%; general public: 19%).

The discrepancy between the estimation of individual benefits by the two groups of respondents is interesting as the public at large has a more favourable view of employment in the private sector than the business leaders, or the employers, themselves.

Table 32: Would you agree that the skills you learned in the education system meet the needs of your job?/Would you agree that the skills taught in the educational system meet the needs of your company?

Business Opinion		Public Opinion	
Would you agree that the skills taught in the educational system meet the needs of your company? (N=1430, %)		Would you agree that the skills you learned in the education system meet the needs of your job? (N=7026, %)	
Totally disagree	14	Totally disagree	9
Disagree	17	Tend to disagree	14
Neither agree nor disagree	15		
Agree	34	Tend to agree	38
Totally agree	20	Totally agree	25
DK/ Refuse	0	DK/ Refuse	14

Both the business community and the general public mostly agree that the skills learned in the education system meet the needs of their job (63%) and that the skills taught in the educational system meet the needs of their company (54%). The business community is more likely to disagree with the above statement (31%) than the general public (23%).

It is not uncommon that people are confident in their own abilities. Nonetheless, and taking into account the labour market situation, it is clear that there must be something of a mismatch between qualifications and labour market demands. This is substantiated by the fact that the respondents, when answering other questions, expressed their readiness to pursue additional education and training.

Generally speaking, the likelihood of getting a job is correlated with the qualification level. This implies that most people do not have the qualifications that are sought after on the labour market.

Table 33: Would you be ready to acquire additional qualifications to advance at work?/ Over the past 12 months, has your business funded or arranged any training and development for staff in the organisation, including any informal on-the-job training, except training required by the law?/How would you assess the readiness of employees in your company to acquire additional qualifications in order to advance and get promoted?

Business Opinion				Public Opinion	
Over the past 12 months, has your business funded or arranged any training and development for staff in the organisation, including any informal on-the-job training, except training required by the law? (N=1430, %)		How would you assess the readiness of employees in your company to acquire additional qualifications in order to advance and get promoted? (N=1430, %)		Would you be ready to acquire additional qualifications to advance at work? (N=7026, %)	
		They are not interested at all	1	I will not for sure	6
No	50	They are not interested	7	Probably I will not	8
Yes	50	Neither interested nor disinterested	23	Probably I will	37
		They are interested	51	I will for sure	46
		They are very interested	16	DK/refuse	2
		DK/refuse	2		

According to the results of the survey examining the respondents' readiness to pursue additional training in order to advance at work, the business community and the general public have similar opinions. As many as 83% of public respondents would be willing to pursue additional training in order to advance at work. On the other hand, 67% of the business community think that their employees are interested in additional training. This shows that the readiness to pursue additional training is greater than perceived by the companies or is overestimated by the respondents. Finally, half of the companies arranged additional training over the past 12 months, although they were not required by law. There is clearly a need to increase the number of training opportunities.

As noted in the previous section, the readiness to pursue additional training implies awareness of a mismatch between acquired qualifications and those that increase the prospects for employment, advancement and better salary.

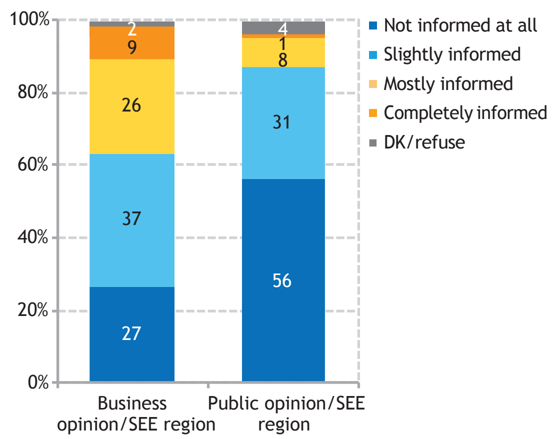
Table 34: What do you think about people from other parts of the region coming to live and work in your country? Is it good or bad for your economy?/ How likely would you employ workers from the region in your company?

Business Opinion		Public Opinion	
How likely would you employ workers from the region in your company? (N=1430, %)		What do you think about people from other parts of the region coming to live and work in your country? (N=7026, %)	
Not likely at all	15	Bad	24
Not likely	14		
Neither likely nor unlikely	24	Neither good nor bad	44
Likely	32		
Very likely	12	Good	27
DK/ Refuse	2	DK/ Refuse	5

Although the questions are not identical, it is possible to compare attitudes of the two groups on the openess of individual economies to intra-regional arrivals pursuing economic opportunities. The findings indicate that the business community is more open to people coming in from other parts of the SEE region looking for employment in companies such as their own (44% would employ them). The general public is less welcoming with only 27% seeing arrivals from within the region as something positive. The discrepancy between the two groups is easily attributable to differing interests; while the public at large is concerned about the impact of a foreign labour influx on the already high unemployment numbers, employers are more concerned with the steady supply of qualified labour wherever it may come from.

Figure 98: To what extent do you think that you are informed about the regional free trade agreement (CEFTA 2006)?

(Public opinion - N=7026, Business opinion - N= 1430,%)



When it comes to awareness of CEFTA 2006, as expected, business people are more familiar with the agreement's provisions (35%) than the general population (9%). There still remains a large proportion of companies that are either unfamiliar with the agreement or know it to a lesser extent (64%).

Figure 99: Do you agree with the following statements::

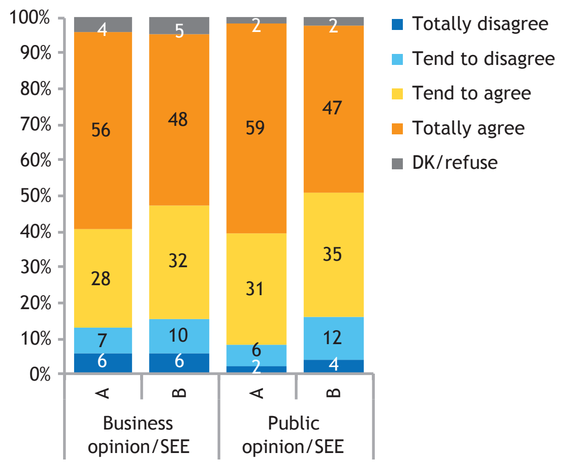
(Public opinion - N=7002, Business opinion - N= 1404, scale from 1 to 4,%)

A - PUBLIC OPINION: Products and goods of my economy can compete well with products and goods from other SEE economies.

A - BUSINESS OPINION: My company's products , goods and services can compete well with products and goods from other SEE economies.

B - PUBLIC OPINION: Products and goods of my economy can compete well with products and goods from the EU

B BUSINESS OPINION: My company's products , goods and services can compete well with products and goods from the EU.



In terms of trade, it is interesting to examine the views of the two groups on competitiveness of domestic products with products from other parts of the SEE region and the EU. As part of the survey, the business community was asked to assess the competetiveness of its own products while the public was asked to appraise products form their own economy against those from the region and the EU. Both groups assessed products under review as highly competitive in the SEE region and the European Union and consider them somewhat more competitive in the SEE market than in the EU (business: SEE: 84%; EU: 80%; general public: SEE: 90%; EU: 82%).

Home bias is stronger than in the economies that are more open and that tend to export and import more than the economies in the region.

Nonetheless, the results of this section bode well for the export potential of regional businesses as they imply that, when available in foreign markets, domestic products would match or even exceed the quality of the competition.

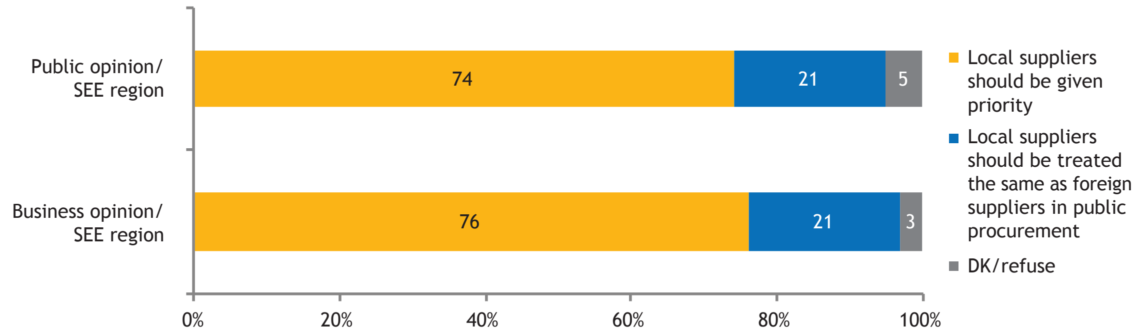
Figure 100:

When procuring products and services, should your government give priority to local suppliers, or should they be treated the same as foreign suppliers (provided price and quality is equal)?

(Public opinion- N=7026, %)

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

(Business opinion - N= 1430,%)



While the award of contracts by government agencies directly impacts the bottom line for domestic businesses, raising expectations that local suppliers will be much more protectionist in their outlook, the gap between the opinions of the business and public respondents is relatively small (76% versus 74%) when it comes to supporting preference of domestic suppliers over foreign ones.

At the same time, 21% of respondents feel that local and foreign suppliers should be treated equally by the government. When it comes to the general public, the biggest support to local businesses is shown in Bosnia and Herzegovina (81%) and the lowest in The Former Yugoslav Republic of Macedonia (55%). With regard to the business community, prioritization of domestic suppliers is advocated most by respondents in Serbia (83%), Kosovo* (82%) and Bosnia and Herzegovina (82%) with fewest supporters in The Former Yugoslav Republic of Macedonia (59%) and Albania (61%).

Bias towards their own companies is likely correlated to the proportion of foreign companies bidding for contracts in public procurement tenders and their success in terms of getting them. This may explain the bias in Bosnia and Herzegovina and Kosovo*, though not quite in Serbia. Competition from abroad is likely smaller in other economies or else it is accepted if part of an agreement with the EU.

Conclusions and Recommendations

CONCLUSIONS

Satisfaction is improving, or rather dissatisfaction is slowly declining. Overall satisfaction is still below average but the outlook is optimistic and suggestive of continued improvement in the future.

Resolution of political conflict tends to impact expectations positively. Democratic resolution of political stalemates improves overall sentiment. By contrast, prolonged political instability hinders growth and hurts expectations.

Larger economies in the region are still more pessimistic, though the gap is closing. Croatia, Serbia and Bosnia and Herzegovina are less optimistic than Kosovo* or Albania, but the sentiment is slowly improving. This is no longer the case for some of the smaller economies. This trend is reflective of improved economic performance across most large economies.

Labour market is the chief problem. Low employment continues to be seen as the main problem. Coupled with the dissatisfaction with the economic situation, also reflective of the labour market situation, there is no doubt that a shortage of jobs, and their quality, is the major concern. Access to employment is conditioned by informal connections rather than qualification, indicating an absence of proper labour market regulations. Finally, much of the criticism directed towards government is driven by a lack of policies that would improve the functioning of the labour market. Overall satisfaction will likely stay depressed until employment prospects improve.

Close to half of the population would rather live abroad, but not in the region. Outward migration has a long history in the region and continues to be popular across all sections of society. This is more of a statement of dissatisfaction with the current state of affairs rather than a concrete indication of coming action.

Personal satisfaction is higher than that with the economy. The majority have a more positive view of their capabilities and prospects than those of their economy. This is indicative of a perception of the economy as a barrier rather than an enabler of individual achievement.

Satisfaction with social relations is better than with politics. Social relations seem to be a source of positive sentiment for the majority, while politics tend to frustrate. In addition, satisfaction with public and communal services tends to be higher than with economic regulation and policies.

Ties with the region more popular than with the EU. Kosovo* and Albania are enthusiastic about the EU, while larger economies, and Serbia in particular, are much more sceptical. While it is expected that growing economic ties will increase support for the EU within the region, this is yet to happen to a substantial degree. Available information on regional integration is limited, but it enjoys more support.

Infrastructure investment and industrial development are popular. Transport by road dominates, so investments in road infrastructure are widely supported cross the region. Industry, and in some cases agriculture, are seen as sectors that should benefit from more government support in terms of both policy and investment.

Inclusion, environment, and fairness continue to be supported. These are areas where the actual state of affairs differs significantly from that described through respondent opinions. The region has significant problems with inclusion, a deteriorating environment, and a plethora of unfair practices. However, these issues enjoy broad public support which should translate into action at some point in the future.

Governance is a major constraint. Concern with corruption seems to be increasing. Overall, governance is considered the main constraint to individual and social improvement. This is reflected in the three main problems cited: low employment, unsatisfactory economic situation, and rising corruption.

RECOMMENDATIONS

Economic policies need to connect with labour markets. Low rates of employment and high rates of unemployment coupled with a very high interest in emigration clearly suggest a need to reorient economic and social policies. Somewhat improved expectations can also be attributed to gradual improvements in the labour markets. More than anything else, jobs will contribute to satisfaction and stability.

Political stability matters and should be nurtured. Prolonged political uncertainty and instability have negative consequences, especially on expectations. Democratic resolution, by contrast, have a significant positive contribution.

Awareness of the economic benefits of integration must be improved. Though the economic benefits of regional and EU integration are real, especially in terms of a strong increase of export, political and policy discourses fuel scepticism about EU integration. There is clearly scope for better public communication on this issue.

Governments need to do better on transparency and responsiveness. Politics are overwhelmingly perceived as intransparent and unresponsive to public needs. This is an issue broader than just corruption, although it forms an important part the public's perception of government. Rule of law needs to be improved, along with the way public services are designed and delivered. This will yield immediate gains in terms of both responsiveness and transparency.

Corrupt practices must be curbed and combated. Once economic performance improves, corruption will become more of a barrier to growth and cause for popular dissatisfaction. Corrupt practices tend to be more of a problem in improving rather than stagnant economic circumstances. For reasons of political stability, anticorruption policies and practices need to be designed and implemented sooner rather than later.

Development-oriented policies are needed. Though economic policies and regulatory reforms are needed, the state of the economy and the levels of dissatisfaction with practically all areas of life indicate that development policies are those that are needed the most. Investments in infrastructure, new jobs, education, as well as public services, are needed to change the prevailing perception of politics and governance as barriers to, rather than enablers of, growth and development.

Note on Methodology

Methodology used in Public Opinion Survey is CAPI (Computer-Assisted Personal Interviewing). The survey was conducted via personal household interviews carried out by trained interviewers from GfK.

Some adjustments and preparations were necessary for the successful implementation of the survey:

QUESTIONNAIRE

The questionnaire was provided by the RCC. It contained 94 questions as well as eight demographic questions (regarding region, size of the settlement, gender, age, education, nationality, marital status, and social status of the respondent). The questionnaire was originally written in English. It was subsequently translated into eight local languages, with the exception of Kosovo*, where both Albanian and Serbian versions of the questionnaire were used, and The Former Yugoslav Republic of Macedonia, where questionnaire in two different languages was also used. The RCC reviewed and approved the translations of the questionnaire.

Since the CAPI methodology was used in the research, all questionnaires were converted to a digital form and installed on interviewers' laptops. The programmes were reviewed by a competent person in each economy.

INTERVIEWERS

The survey was conducted by GfK in all economies, except Montenegro where De Facto Consultancy was hired as a sub-contractor. All interviewers were given written instructions containing general description of the questionnaire, of the method of selecting addresses for the interviews and of the respondent selection method. In addition to the written instructions, all interviewers were trained to understand research goals and interviewing methods (a random route and last birthday method). Moreover, project coordinators examined the entire digital questionnaire jointly with the interviewers and emphasised some important elements (especially the need to read individual answers where one or more answers were possible, etc.). Since a random route method was chosen for the research, all GfK interviewers were given the initial addresses for sampling points, and later on they started to use a random route method.

SAMPLE

Public Opinion Survey was conducted among N=1000 respondents in each economy, aged 18+ with the total of 8000 respondents for the entire SEE region, including Turkey.

The respondents were persons:
a) aged 18 or older who reside in private households;
b) whose usual place of residence is in the territory of the economies included in the survey;
c) who speak the national language(s) well enough to respond to the questionnaire.

A stratified two-stage clustered design sample with random route for the selection of addresses and respondents (last birthday method) was used in the survey. The described sample was used as most similar to probability sample which would be too costly. The sampling selection process is random in the following stages: the selection of the sampling points, the selection of addresses, the selection of households and the selection of individuals aged 18 and older.

Only Primary sampling units (PSU - counties/regions) and Secondary sampling units (SSU-size of settlements) were defined in advance, as quotas. In order to create the sample design we used the most recent available statistical data for each economy. The sample structure by region and size of settlement for each economy is presented in Table 36 and Table 37.

STRATIFICATION/SELECTION PROCEDURE

In order to obtain the same structure of the population, firstly the sample was stratified according to the region or county (depending on economy). At the beginning of the sampling procedure, the number of persons to be interviewed in each PSU (region or county) was defined according to census data and the share of the region in the total population.

The number of respondents was calculated based on the number of inhabitants in each size of settlements for individual 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 15.

After defining their number, the sampling points were chosen randomly according to the last census data. Households in each sampling point were chosen by a random walk method. In a selected household the respondent was the person whose birthday came latest (last birthday method).

Table 35: Total 18+ population for each economy

Weighted results were presented for the SEE region based on the described data.

	Population 18*
Serbia	5.923.734
Croatia	3.485.881
Bosnia and Herzegovina	3.107.754
Albania	2.060.324
The Former Yugoslav Republic of Macedonia	1.497.014
Kosovo*	1.147.289
Montenegro	474.655
Turkey	57.133.155

Table 36: Sample structure by region

	Region	%
Albania	Berat	5,1
	Dibër	4,5
	Durrës	9,2
	Elbasan	10,3
	Fier	11,4
	Gjirokastër	2,8
	Korçë	8,2
	Kukës	2,7
	Lezhë	4,6
	Shkodër	7,7
	Tiranë	27,2
	Vlorë	6,4
Bosnia and Herzegovina	Federacija BiH	57,6
	Republika Srpska	40,5
	Brčko distrikt	1,9
Montenegro	Central region	47,0
	North region	29,3
	South region	23,7
Croatia	Zagreb and sourroundings	26,2
	Northern Croatia	17,0
	Slavonia	16,5
	Lika, Kordun, Banovina	8,3
	Istra, Primorje, Gorski Kotar	12,2
	Dalmatia	19,8
Kosovo*	Ferizaj / Uroševac	10,5
	Gjilan / Gnjilane	10,6
	Peja / Peć	12,5
	Mitrovica	15,9
	Prizren	15,7
	Gjakovë / Đakovica	12,1
	Prishtinë / Priština	22,7

	Region	%
The Former Yugoslav Republic of Macedonia	Vardar	8,1
	East	9,6
	Southwest	10,8
	Southeast	8,8
	Pelagonia	10,4
	Polog	14,2
	Northeast	8,6
	Skopje	29,6
Serbia	Beograd	23,3
	Južna i Istočna Srbija	21,8
	Centralna i Zapadna Srbija	28,1
	Vojvodina	26,8
Turkey	Antalaya	18,8
	Ankara	4,9
	Samsun	13,9
	Tekirdag	10,2
	Trabzon	9,9
	Bursa	12,0
	Izmir	5,0
	Gaziantep	6,2
	Istanbul	3,0
	Erzurum	3,0
	Kayseri	4,0
	Malatya	9,0

Table 37: Sample structure by size of settlement

	Size of settlement (number of inhabitants)	%
Albania	Up to 2.000	1,4
	From 2.001 to 10.000	21,3
	From 10.001 to 50.000	30,8
	From 50.001 to 100.000	19,9
	Over 100.001	26,7
Bosnia and Herzegovina	Up to 5.000	42,6
	From 5000 to 19.999	21,5
	From 20.000 to 49.999	18,6
	From 50.000 to 99.999	4,0
	Over 100.000	13,4
Montenegro	Up to 5.000	32,1
	From 5.001 to 10.000	11,8
	From 10.001 to 20.000	11,9
	From 20.001 to 50.000	10,5
	From 100.001 to 150.000	33,7
Croatia	Up to 2.000	38,8
	From 2.001 to 10.000	16,1
	From 10001 to 100000	21,8
	Over 100.001	23,4
Kosovo*	Up to 2.000	41,6
	From 2.001 to 5.000	19,0
	From 5.001 to 10.000	6,9
	Over 10.001	32,5
The Former Yugoslav Republic of Macedonia	Up to 2.000	24,5
	From 2.001 to 5.000	14,0
	From 5.001 to 10.000	7,3
	Over 10.001	54,1
Serbia	Up to 5.000	34,6
	From 5.001 to 50.000	23,7
	From 50.001 to 100.000	10,9
	From 100.001 to 250.000	14,5
	Over 250.000	16,2
Turkey	Over 100.001	100

Figure 101: Sample structure by gender

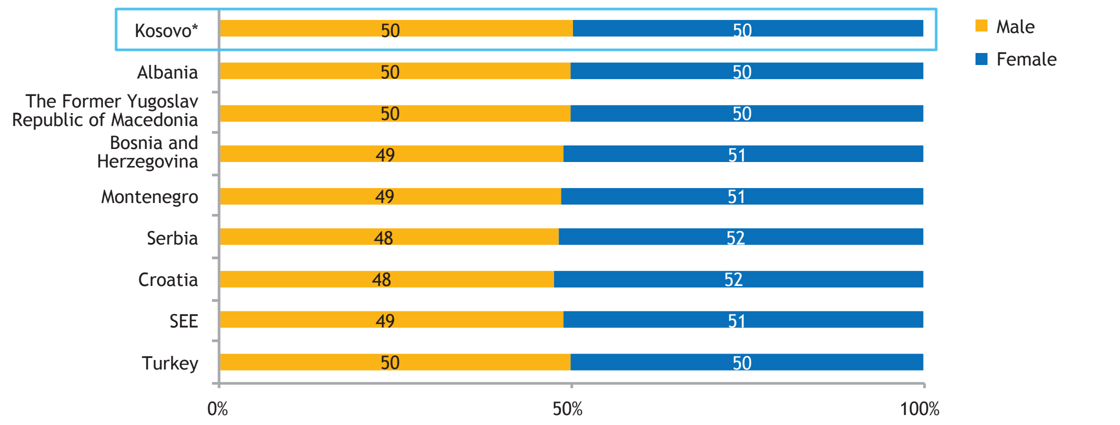


Figure 102: Sample structure by age

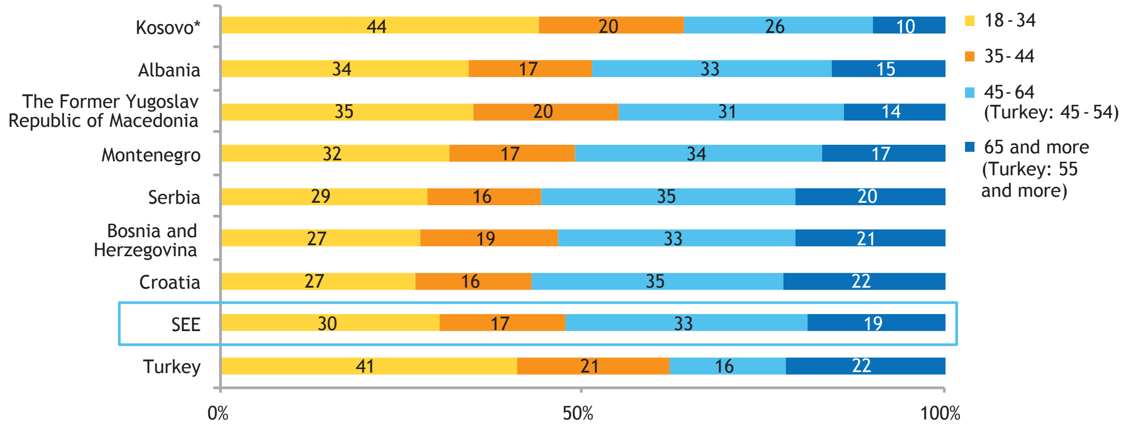


Figure 103: Sample structure by education

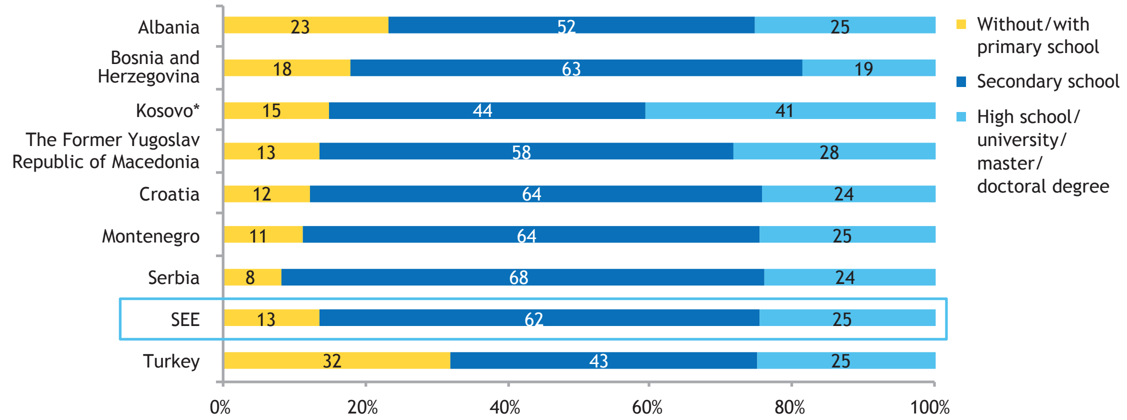


Figure 104: Sample structure by marital status

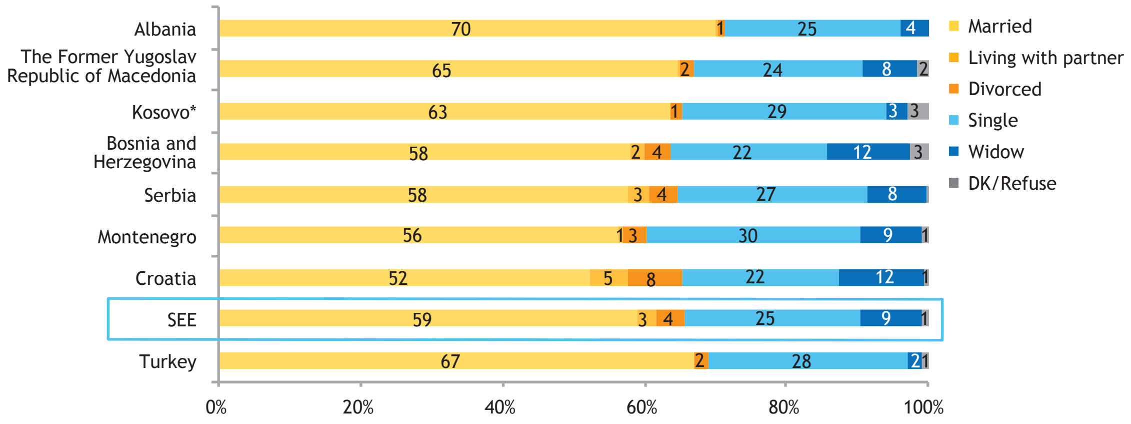
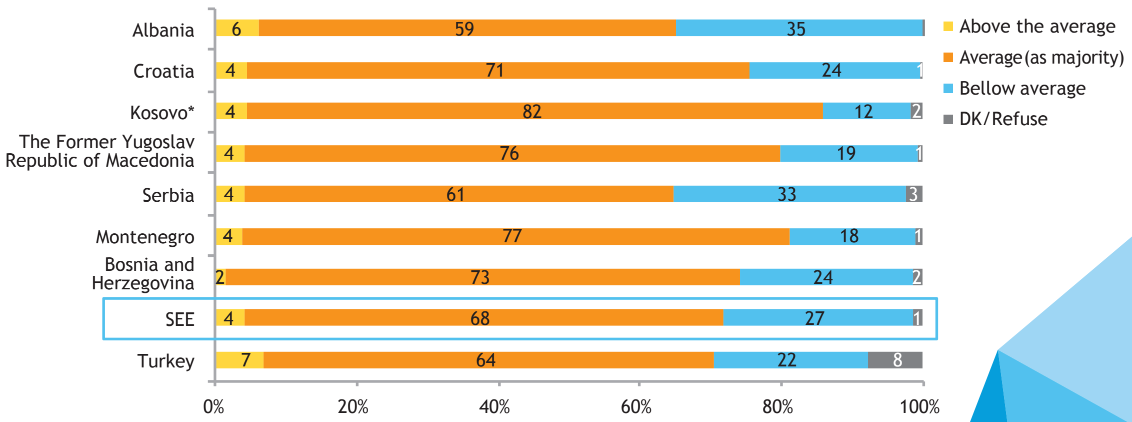


Figure 105: Sample structure by social status (self estimation)



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