



RegionalCooperationCouncil

BALKAN BAROMETER

Infographics

POCKET EDITION



This project is funded
by the European Union



BALKAN BAROMETER

PEOPLE AND BUSINESSES VIEWPOINTS

- **Balkan Barometer** - annual survey of public opinion and business sentiments in six Western Balkans economies, commissioned by the Regional Cooperation Council (RCC)
- **Balkan Barometer** - examining aspirations and expectations on life and work, prevalent socio-economic and political trends & regional and European integration
- **Balkan Barometer pocket edition** - features some of the defining thoughts of citizens and businesses on prevailing issues facing our region through infographics
- **Balkan Barometer 2020** - conducted by Indago among 6,020 citizens and 1,215 companies at the end of 2019 throughout the region

Download **Balkan Barometer** at: www.rcc.int/balkanbarometer



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HIGHLIGHTS

Overall, **satisfaction with life** in the region is modestly growing, driven chiefly by expectations for the future but also by a more positive appraisal of the respondents' present situation. Balkan Business Sentiment Index has reached the highest score in 6 years of 65 points (out of maximum of 100).

Unemployment and level of **economic development** continue to be the two key problems facing the region, albeit to a significantly lesser degree than in previous years.

Corruption is once more ranked third and its perceived prevalence in the region is growing, with **brain drain** concerns exploding over the past few years, growing from **0% in BB2015 to 20% in BB2020**.



An overwhelming majority of citizens are **supportive of regional cooperation** and its role in improving the political, economic and security situation in their home economies. This sentiment is also shared by businesses, although to a lesser degree.

Support for EU membership is growing across much of the region with 59% of citizens and 63% of businesses endorsing EU accession.

An underlying sentiment of solidarity pervades the Western Balkans with close to two-thirds of all respondents focusing on what **brings the region together** rather than drives it apart.



A long-term leader in the investment priorities rankings, industrial development, has been relegated to second place by **social infrastructure**, highlighting widely held concerns over the **quality** of critical public service providers, such as **schools** and **hospitals**. This trend is likely to increase following the COVID-19 pandemic and its impact on the public health and social security systems.

Confidence in public institutions is at an all-time low, with a significant decline in trust across most of the institutions for which the survey was conducted. Furthermore, an overwhelming majority of the region's residents feel that laws are not applied effectively nor impartially.



THE BIGGEST CONCERNS OF WESTERN BALKANS CITIZENS:

	BB 2020	BB 2015	Difference
Unemployment	45%	64%	19% less ↓
Economic Situation	40%	58%	18% less ↓
Corruption	31%	16%	15% more ↑
Brain Drain/Emigration	20%	0%	20% more ↑
Crime	17%	19%	2% less ↓

Unemployment & economic situation remain dominant but to a much lesser degree than in the previous years, but concerns over brain drain and corruption are on the rise!



BALKAN SENTIMENT

& LIFE SATISFACTION INDEX

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// BALKAN SENTIMENT & LIFE SATISFACTION INDEX



Balkan Public Sentiment Index (BPSI)
modestly IMPROVING!

100

from **35** points in BB2015 to **46** points in BB2020



But BPSI is still under 50!

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// BALKAN SENTIMENT & LIFE SATISFACTION INDEX



Balkan Business Sentiment Index (BBSI) overwhelmingly POSITIVE!

from **47** points in BB2015 to **65** points in BB2020



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// BALKAN SENTIMENT & LIFE SATISFACTION INDEX



REGIONAL COOPERATION & EU INTEGRATION



11 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// REGIONAL COOPERATION & EU INTEGRATION



Regional cooperation

Important for **77%** of Western Balkans citizens

Support grows from **72%** in BB2018



12 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// REGIONAL COOPERATION & EU INTEGRATION



Quality of regional cooperation

Important for **57%** of Western Balkans Businesses



13 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// REGIONAL COOPERATION & EU INTEGRATION



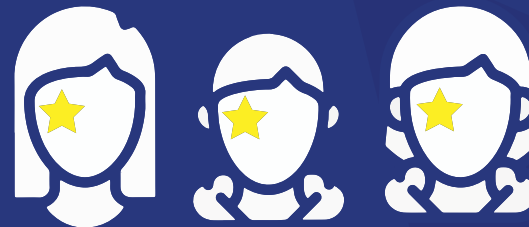
EU membership



Majority **59%** of Western Balkans citizens think EU accession is a good thing



Steady support growing from **39%** in BB2016

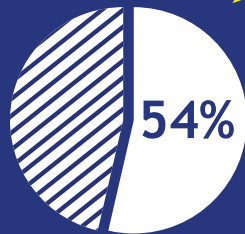


64% of young people from the Western Balkans think that EU membership is a good thing

63%

of Western Balkan companies
feel EU accession would be a
good thing for their business!

In BB2016
it was 54%



LIFE QUALITY

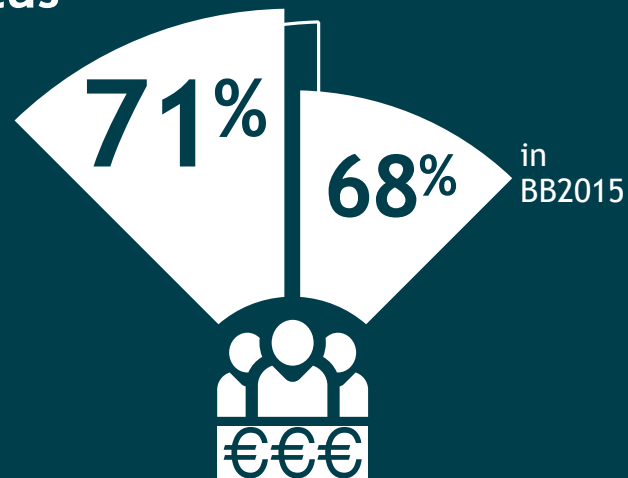
Socio-economic status

71% of people in the Western Balkans estimate it as average

22% below average
(27% in BB2018)



5% above average
(3% in BB2019)



Economic inequality

82% of people in the Western Balkans feel that the gap between rich and poor is increasing

3% increase
on the previous year





44%

of Western Balkans citizens were unable to afford holiday away from home



19%

couldn't afford to pay rent or utilities



18%

couldn't afford heating



12%

missed loan payments (down from 14 in BB2019)



12%

couldn't afford food supplies (down from 16% in BB2019)



EMPLOYMENT

22 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// EMPLOYMENT



Jobs

69% of Western Balkans citizens felt confident in **keeping** their jobs in the next 12 months

4% increase
on the previous year



23 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// EMPLOYMENT



Employment

17% of Western Balkans households report no members currently employed



Slight improvement from 23% in the previous year

24 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// EMPLOYMENT



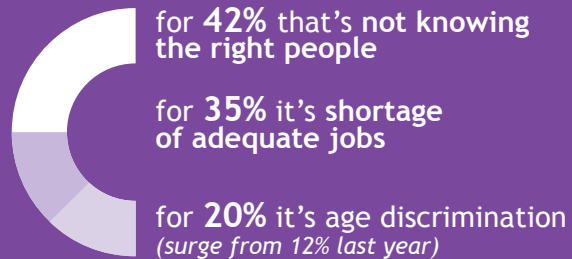
38% of Western Balkans businesses expected to employ new workers at the time the survey was conducted



25 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// EMPLOYMENT



Leading employment obstacles in the Western Balkans



The most important thing for getting ahead in life

for **30%**

of Western Balkans citizens it's **knowing the right people**

for **26%**

it's **good education**
(23% in BB2019)

for **20%**

it's **working hard**

EDUCATION & SKILLS

28 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// EDUCATION & SKILLS



59% of people in the Western Balkans consider the **skills** acquired through **formal education** to be **adequate** to their present job requirements

29 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// EDUCATION & SKILLS



Overwhelming majority of the Western Balkans businesses,

63%

agree that skills taught throughout the education system meet the needs of their companies

a marked improvement on the previous year (52% in BB2019)



DIGITAL TRANSFORMATION

Internet - 69% of Western Balkans citizens say they use it for **communication**



Improvement from previous year's 26% 

35%

of Western Balkans citizens report **saving money** on phone costs with the new **Regional Roaming Agreement** coming into force

In 2019 70% said removal of roaming charges would be beneficial



78%


of Western Balkan companies report that digital skills are **important** for doing **business**





86%

of the Western Balkans population now declare themselves **satisfied with their online experience**



only

16%

of the Western Balkans citizens express bias against online purchases, against 44% in 2018





30%

of the Western Balkans executives say that online sales make up a significant source of revenues

compared to only 20% in BB2019

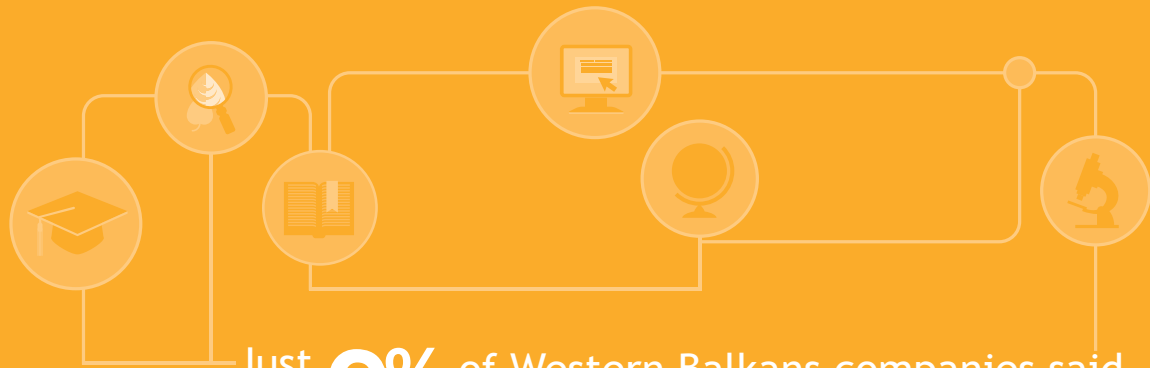


Concerns of the Western Balkans citizens over security of online purchases have decrease

to 20% from 25% in BB2019 

INNOVATION AND TECHNOLOGY

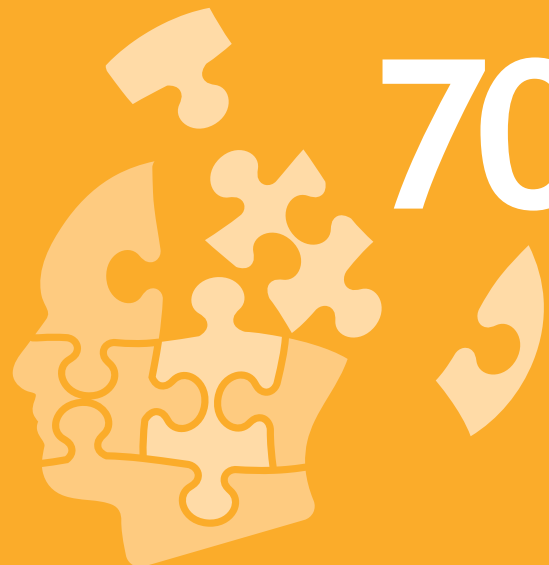




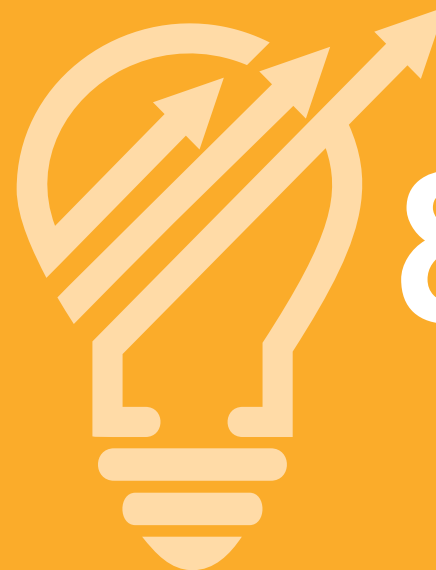
Just **9%** of Western Balkans companies said they cooperated with the universities on developing new products or services in the past 3 years

Close to **80%** of the businesses in the region said they developed innovations on their own

While **18%** co-developed them with another enterprise



70% of the companies in the region introduced an innovation that was new only to their enterprise

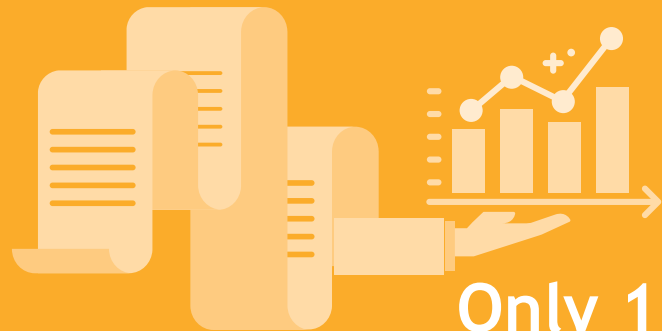


82% of the Western Balkan companies usually say they work on the process of innovation on their own





**Only
1 in 10**
businesses in the
Western Balkans
reports cooperating
with universities



Only 1 in 10
companies in the Western
Balkans says it got financial
support for innovation, either
from governments or
international donors



MOBILITY

46 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// MOBILITY



47 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// MOBILITY

43%

of Western Balkans citizens
would consider leaving
and working abroad

a **4** point increase compared
to last year when it was **39%**



Out of those Western Balkans citizens considering leaving:

59% are only entertaining the idea without having taken any concrete measures

24% are taking active steps to get informed about their options

9% are applying for work abroad (up from 6% in BB2019)

4% are on their way out, pending administrative clearance

2% know the date of their departure



11% of Western Balkans citizens would consider moving and working in one of the economies in the region

Decrease from
13% in 2019

40%

of Western Balkans citizens are now supportive of inward migration from another regional economy



> +18% compared to 2016



53%

of Western Balkans businesses would be likely to employ a qualified worker from another economy from the region (compared to 48% in 2019)



while almost a quarter (24%) would not

TOURISM AND TRAVEL

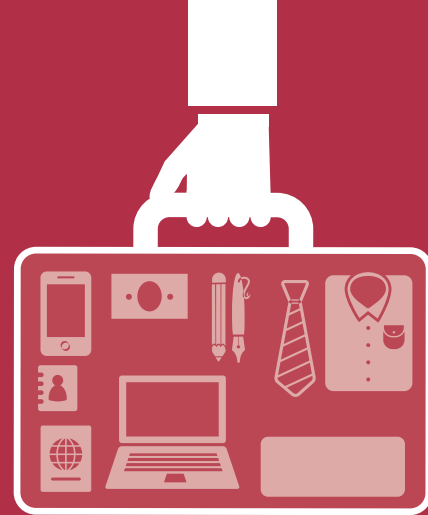
54% of Western Balkans citizens
did not visit another economy
in the **region** over the past **12 months**

> Decrease from
2019 when it was **64%**



60%

of Western Balkans citizens
said they
**travelled for
tourism/leisure**



**Business travel
accounts for only
13% of all regional
visits**

W E L C O M E



46% of the region's residents feel welcome in any of the Western Balkan's cities



In 2015 only

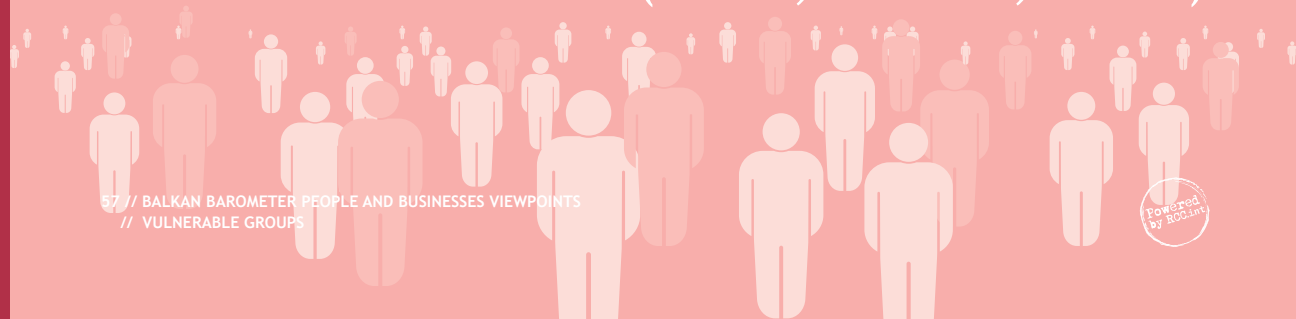
27%

felt welcomed in the Western Balkans cities



VULNERABLE GROUPS

(Roma, Women, Youth)





91%

of Western Balkans citizens support affirmative action to employment of people with disabilities

58 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// VULNERABLE GROUPS



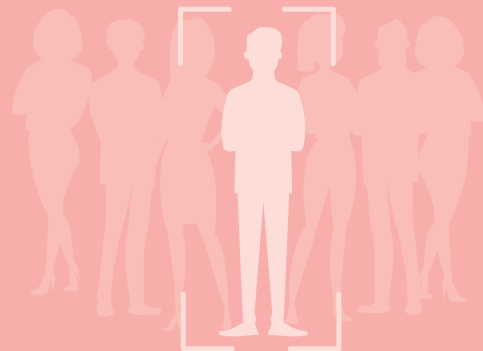
75%

of Roma community



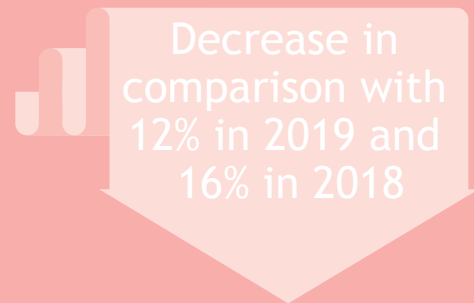
72%

of displaced persons or refugees



9%

of Western Balkans executives say they would not hire Roma, although the number is constantly shrinking



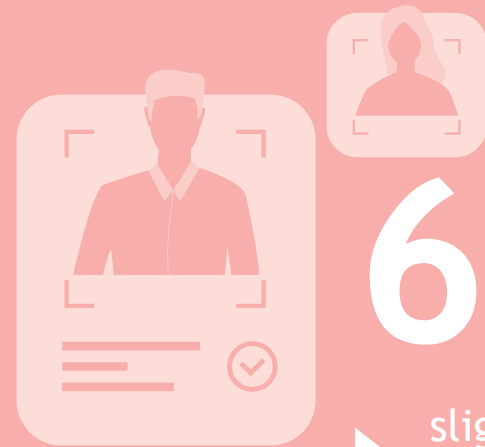
59 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// VULNERABLE GROUPS





15%

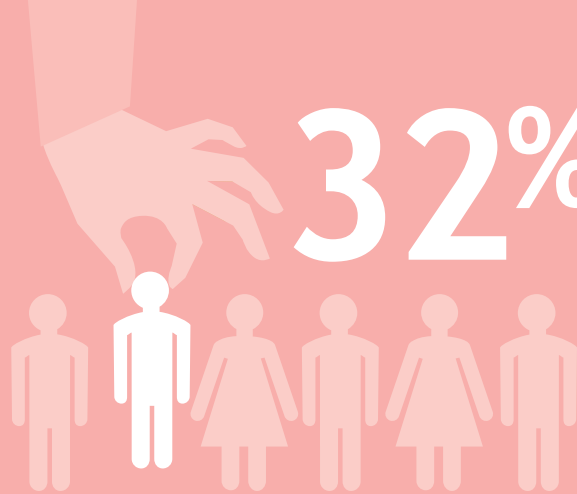
of Western Balkans executives still believe that employing a **Roma worker** would negatively impact the working environment of their company



63%

of Western Balkans citizens prefer male managers over female

> slight improvement from
68% in 2019



32%

of Western Balkans executives say they prefer male employees
significant increase from 24% in BB2019



Staggering
71%

of Western Balkans youth think about going to work abroad

and another
10% are still considering that option





51% of young people in the Western Balkans worry about **employment**



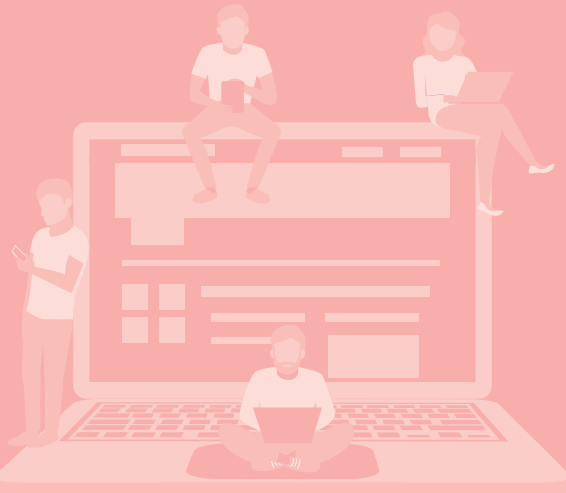
37% worry about **economic situation**



28% worry about **corruption**

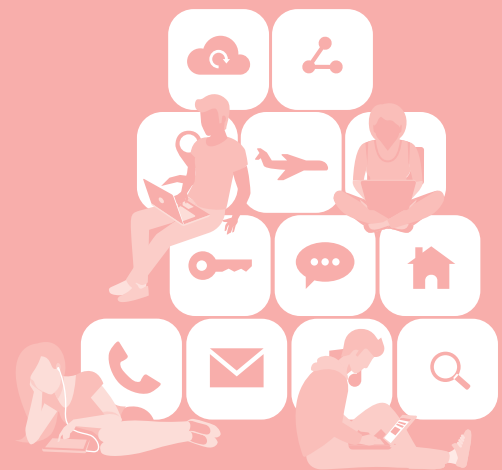


61% of Western Balkans youth agree that what brings Western Balkans citizens **together** is more **important** than what separates them



50%

of the Western Balkans youth **did not even discuss** something that could affect government decision, while **11%** participated in **protests** and only **4%** participated in **public debates**



32%

of Western Balkans youth was **not actively involved in government decision-making** because they **“did not care about it at all”**

18%

think individuals cannot make changes

20%

don't want to talk publicly





TRADE



58%

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

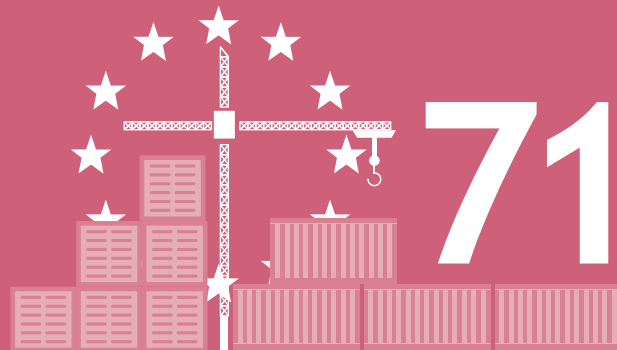


> a 5-point increase from 2019



67%

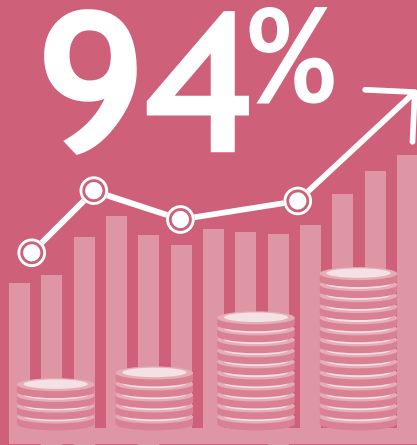
of people in Western Balkans expect consumers to benefit from entry of foreign companies into domestic markets



71%

of Western Balkans citizens cite EU as their first preferred trade partner

- > 36% prefer Russia and Turkey
- > 31% China
- > 17% would like to see trade enhanced with Middle Eastern and Gulf countries



94%

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

92% feel the same about products from the **EU**

68%

of Western Balkans citizens tend to pay attention to the **origin of products** while shopping





53%

of Western Balkans executives say our region is a good place to invest

74 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// TRADE

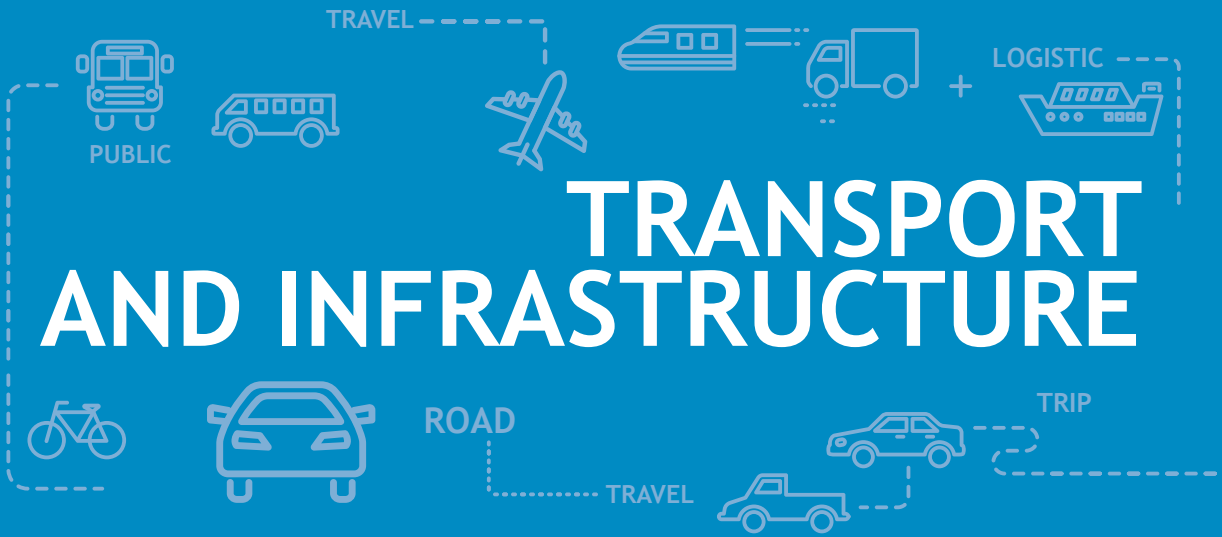


Only **1 in 10**

firms in the Western Balkans say they have invested abroad during the past year

75 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// TRADE

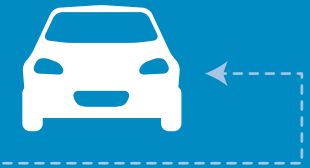




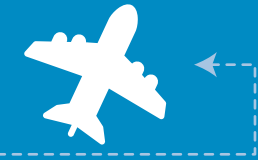
TRANSPORT AND INFRASTRUCTURE



60% of Western Balkans citizens said they travelled by car in the past 12 months



2% by aeroplane



25% by bus
a significant decrease since 2018 when it was 34%, indicating that more people were able to afford automobile



12%

of Western Balkans citizens say they **did not leave their place of residence** at all over the past year

78 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// TRANSPORT AND INFRASTRUCTURE



61%

of Western Balkans citizens are happy with the quality of **transport infrastructure** in their economies

> while **38%** are not

79 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// TRANSPORT AND INFRASTRUCTURE





67%

of Western Balkans executives called for **additional investment in road infrastructure** as potentially the most **beneficial development** to their business

an 8% increase since 2019

57%

of Western Balkans citizens consider **road travel** in their economies to be safe

ROAD

ENVIRONMENT

82 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// ENVIRONMENT



74%

of Western Balkans citizens
consider climate change
as a serious threat

83 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// ENVIRONMENT



74%
9%

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

increase since last year



67%
26%

of Western Balkans citizens say they are willing to pay **more for environmentally friendly products** are not



123456789012345123





73%

of Western Balkans
businesses have taken
environmental mitigation
measures

significant
increase from **64%**
in 2019



PUBLIC ADMINISTRATION



Small increase in satisfaction with government services

When asked 'how would you grade the following issues', western balkans citizens said:

	BB 2015	BB 2020
TREATMENT OF CITIZENS IN PUBLIC SECTOR	2.3	2.8
TIME REQUIRED FOR OBTAINING PUBLIC SERVICES	2.4	2.7
TIME REQUIRED FOR GETTING INFORMATION IN PUBLIC SECTOR	2.4	2.7
PRICE OF PUBLIC SERVICES	2.2	2.5

(scores from 1 to 5)



17%

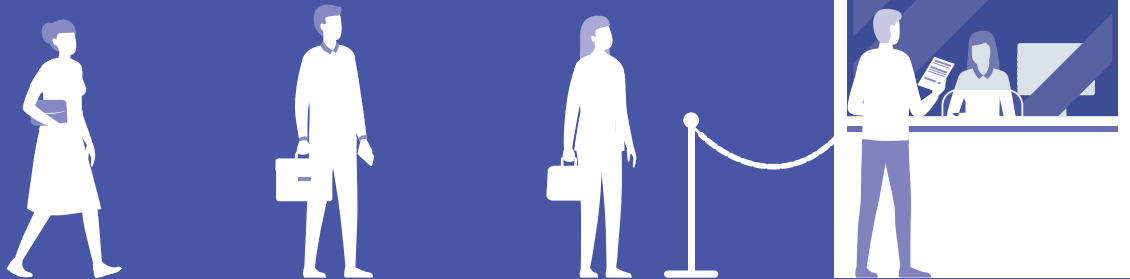
of people in Western Balkans got their personal documents online (increase from 13% in 2019) while

30%

think this is not possible at all

53%

of the Western Balkans citizens are satisfied with the efficiency of administrative procedures in the public sector



90 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// PUBLIC ADMINISTRATION



JUSTICE

91 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// JUSTICE





66% of the Western Balkans citizens feel that laws are not applied effectively

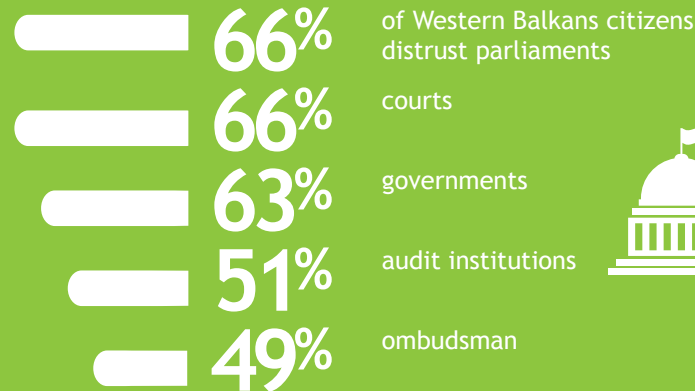
a **7-point** increase on the previous year

76% of the Western Balkans citizens feel that laws are not applied equally

a **6-point** increase on the previous year



These are the least trusted public institutions in the Western Balkans





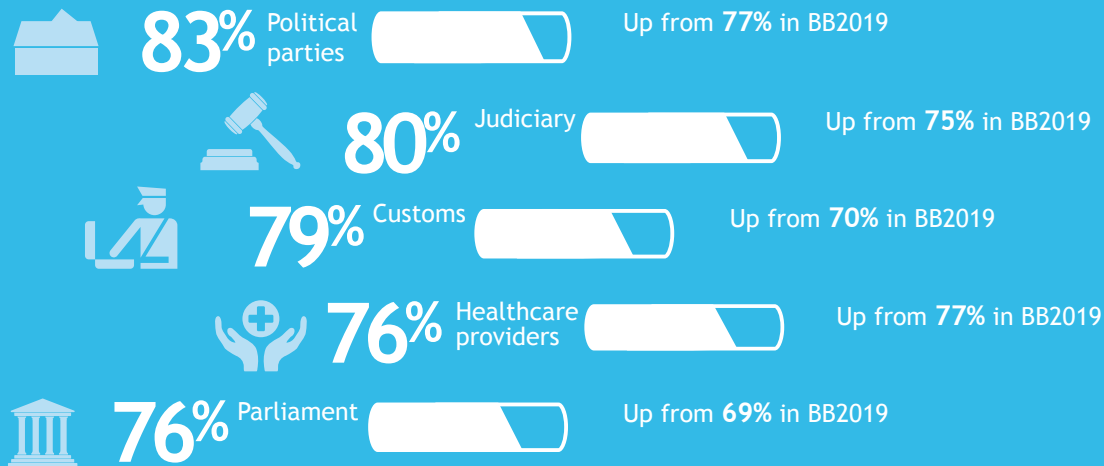
71%

of the Western Balkans citizens feel that the judiciary system is **not independent** of political influence



CORRUPTION

When asked who they consider to be **most corrupt**, Western Balkans citizens said:

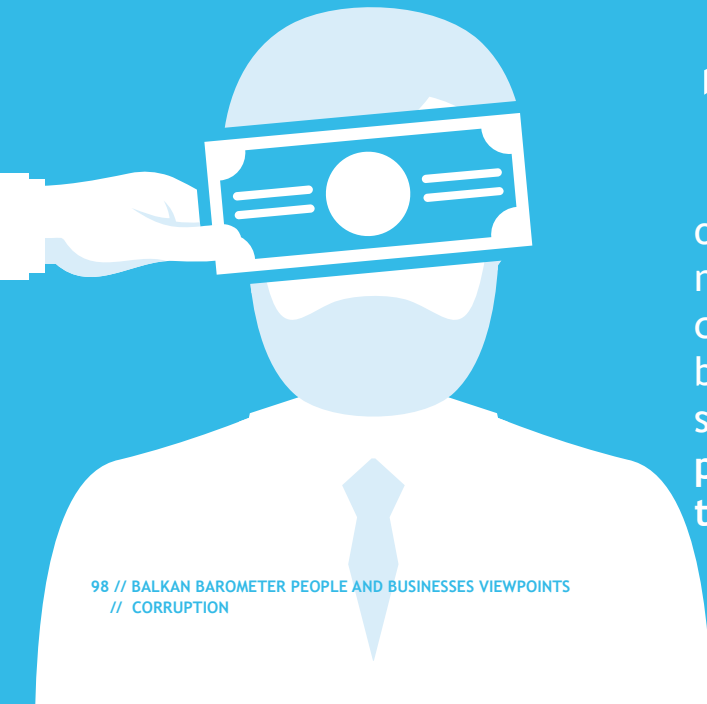


71%

of Western Balkans population said they are **unhappy** with their governments' efforts to **combat corruption**



a significant **increase** from last year's **61%**



19%

of Western Balkans businesses feel it is common for companies in their line of business to have to pay some irregular "additional payments/gifts" to "get things done"

98 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// CORRUPTION



44%

of Western Balkans business leaders believe that reporting a wrongdoing to the authorities is the most effective way to stop it; with 28% still believing that

99 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// CORRUPTION





SECURITY

100 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// SECURITY



101 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// SECURITY

Less than a third of the Western Balkans citizens declare anxieties over theft of personal data

13% drop in a 12-month span



But almost half of all respondents have **no concerns over Internet transactions**



102 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// SECURITY



103 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// SECURITY



46%

of Western Balkans citizens are **unhappy** with the **security situation** in their economy

63%

of Western Balkans citizens
perceive **migration** as a **security
risk** to their economy



46%

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

OVERVIEW OF KEY SENTIMENTS PER EACH WESTERN BALKANS ECONOMY

106 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// OVERVIEW OF KEY SENTIMENTS PER EACH WESTERN BALKANS ECONOMY



107 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// OVERVIEW OF KEY SENTIMENTS PER EACH WESTERN BALKANS ECONOMY



Albania

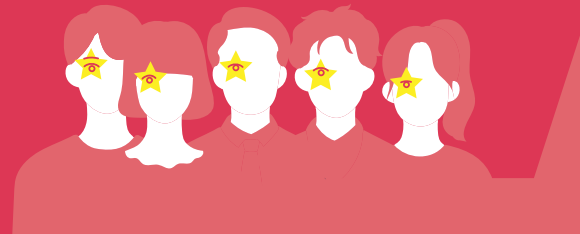
Still region's most supportive economy towards EU membership

87% of people believe EU membership is a good thing - by far the highest percentage in the region

Almost 2/3 or 65% of people feel that having a good education and working hard is key to success in life - much higher than the regional average

Albania has suffered a significant decrease in Balkan Business Sentiment Index, the only such economy in the region,

from **65** in BB2019 to **55** in BB2020



49% would consider leaving and working abroad and 46% prefer to stay - the only economy in the region with ratio favouring leaving

90% of people surveyed think that the gap between the rich and the poor is increasing - a regional high when it comes to perceived rise in inequality



Bosnia and Herzegovina

Mixed messages of cautious business optimism and low public trust in institutions

Respondents from Bosnia and Herzegovina are the **region's champions** when it comes to support of stronger regional trade ties with

68% in favour of enhancing Western Balkans trade links

up by 15 points in BB2019



110 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// OVERVIEW OF KEY SENTIMENTS PER EACH WESTERN BALKANS ECONOMY // BOSNIA AND HERZEGOVINA



Companies from BiH lead the region in investment and trade openness, with **14%** of companies declaring they **invest abroad**, **45%** of firms **exporting** and **24%** of revenues being generated through **sales on export markets**.

As the region's most frequent travellers, BiH citizens overwhelmingly assess the **quality of their transport infrastructure as poor - 57%**, and road travel as **unsafe - 63%**

An astounding **88%** view their government's handling of anti-corruption as unsatisfactory, a regional high.

More than 2/3 of the citizens are **unsatisfied with the security situation - 69%**.



111 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// OVERVIEW OF KEY SENTIMENTS PER EACH WESTERN BALKANS ECONOMY // BOSNIA AND HERZEGOVINA



Kosovo*

Hopeful, with the most optimistic outlook in the region

Kosovo* has recorded the **highest Balkan Public Sentiment Index** of **52** with the highest number of people in the region **expecting financial situation to be better over the next year - 47%**

71% of companies consider Kosovo* a good place to invest, with **79%** of executives reporting an **improved business situation** over the past year

→ both **significantly higher** than the regional average

112 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// OVERVIEW OF KEY SENTIMENTS PER EACH WESTERN BALKANS ECONOMY // KOSOVO

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

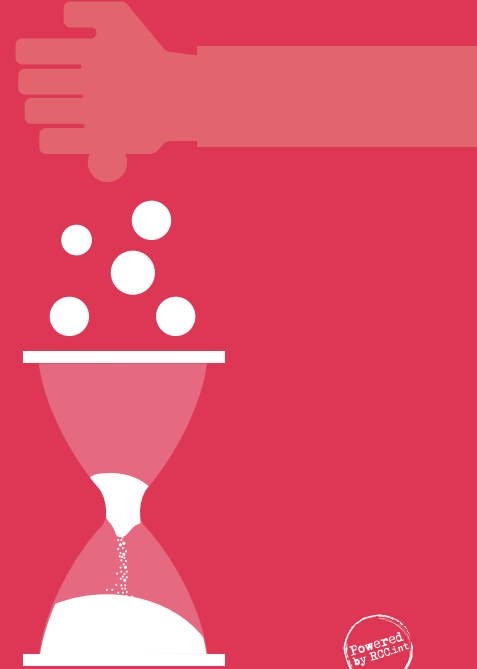


More than **3/4** of executives, or **77%** consider the **quality of regional cooperation** as either **very important** or **important** for their **business**

Only **51%** of respondents see **climate change** as a **problem**

Informal economy seems to be the highest in the region as, on average only **68%** of revenues is reported for **tax purposes**

113 // BALKAN BAROMETER PEOPLE AND BUSINESSES VIEWPOINTS
// OVERVIEW OF KEY SENTIMENTS PER EACH WESTERN BALKANS ECONOMY // KOSOVO



Montenegro

Low volatility and high optimism

Higher trust in the rule of law than in the rest of the region, with close to half of respondents feeling that the law is applied effectively - **49%** and **equally to all** - **39%**

Businesses are optimistic, reporting a particularly good year with **59%** of companies noting **improvement of business situation**, a **26-point** hike compared to 2019



People from Montenegro are most likely to feel **welcome** anywhere in the region - **66%**

The majority also has positive sentiments towards citizens from **other economies** in the region coming to work in Montenegro - **58%**

The only economy in the region that has recorded a slight **decrease** in the **Balkan Public Sentiment Index** **50** compared to **51** in the previous years

although the expectation index, **58**, is higher by **5 points**

North Macedonia

Rebounded from the last-year's drop in sentiments

Economy rebounded compared to last year, with the **Balkan Public Sentiment Index** growing to **45** from **41** of the previous year

Balkan Business Sentiment Index at **57**, compared to **54** last year

North Macedonia is also a home to the largest proportion of respondent **confident in retaining their job over the next years 72%**



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Respondents display the highest level of concern with brain drain with **28%** noting this as the **biggest** problem the economy is facing!

Businesses among least likely in the region to take any steps in reducing environmental impact - **36%** report **no actions being taken**

Steep increase on importance of **EU membership for businesses** from **46%** in **2019** to **61%** in **2020**

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Serbia

Stabile sentiments compared to last year

Serbia boasts the highest number of people, **33% satisfied with the security situation**

83% of the people surveyed noted that **migrants** entering the economy represent a **security risk**

There is an increasing level of anxiety over brain drain, as **27%** of people see it as their **biggest concern** compared to **21%** last year



Serbian companies are reportedly making the biggest effort to **reduce environmental footprint** with **80%** of firms **taking some steps in this direction**

Serbian respondents prefer strengthening trade and investment ties **with Russia 57% and China 47% more than any other economy in the region**

Serbians feel least comfortable traveling in the region, **with only 27% feeling welcome in all of the cities in the region**

Likely, they are least welcoming to other citizens of the region coming to work in Serbia with **22%** responding **negatively** to this **intra-regional mobility**





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