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BALKAN BAROMETER 2023

PUBLIC OPINION

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FOREWORD

It is with great pleasure that the Regional Cooperation Council (RCC) presents the Balkan Barometer 2023 - the ninth edition of the annual survey of regional perceptions and attitudes across a wide array of social, economic and environmental factors. It was in 2014 when the Regional Cooperation Council first commissioned the Balkan Barometer, and since then, it offers a great opportunity to monitor and understand the evolution of socio-economic factors and support development of substantiated policies. We take pride in the fact that Balkan Barometer public and business perceptions surveys have proved to be a truthful source of sentiments across the region and that are widely used by policy makers, academics, the media and civil society actors. These surveys have not only offered a better understanding of the citizens' and businesses' attitudes towards present situation but offer also a clearer insights into their expectations and aspirations.

The Western Balkans region has been navigating an extended period of challenges and uncertainties but also of growth, albeit small, and resilience building, while contending with increased geopolitical instability. In the last year, the EU and Western Balkans alike were faced with sharp increase in food and energy prices strongly affecting the consumer sentiment as the cost of living accelerates. Yet, against this difficult and challenging background, the regional cooperation and accession process reached the hoped-for turning point, significantly advancing towards a closer and better connected region. Consequently, citizens' faith in regional cooperation and high expectations that go with it were reaffirmed in this year's Balkan Barometer survey: More than three quarters of citizens (76%) have a positive attitude towards the impact that regional cooperation can have on their political, economic and security situation. Moreover, almost half of the citizens (49%) agree that relations in the region have improved in the last 12 months and 69% of citizens agree that what brings them together is more important that what divides them.

This year's Balkan Barometer report presents a series of mixed findings. To some, these findings may seem grim, to some others may seem surprising, yet they modestly depict the reality that the region and our citizens face.

EU membership remains a strategic priority for the region and overall support for the process is still high (59%), yet the declining trend is visible (3% less than in 2021). Economic situation and unemployment remain greater concerns in the region which have been identified as the top two problems by 47% and 32% of respondents respectively.

There is an overall positive perception on the role of education system, with a total of 72% of those who support its effectiveness in equipping with the necessary skills. However, this cannot overshadow the worrying trend of those who consider living abroad (44%), 5 points more than in 2022.

Climate change awareness is still to be built in the region. An important share of 49% of citizens consider climate change a serious problem, however this is a significant drop from the overall share of 67% in 2022. As for the ranking of environmental concerns, air pollution is considered the biggest by 57% of Western Balkans citizens, followed by water pollution (44%), and soil pollution (39%). Proper information of citizens about the green transition and green socio-economic recovery of our region should be prioritised along with effective mechanisms for effective public participation.

We see these findings as a plea to understand better the expectations of our citizens and reflect on how to better respond to the current and emerging regional challenges by taking advantage of the opportunities offered by enhanced regional cooperation and credible accession process.

INTRODUCTION

The 2023 Balkan Barometer report comes at a difficult time for the region, Europe, and the world. After the pandemic and its considerable impact on economies and citizens' lives, since 2022, the war in Ukraine has had several consequences which have been visible in the Western Balkans (WB) as well. This ninth edition of Balkan Barometer explores perceptions of citizens and businesses on a large variety of components which affect their daily operations and lives. Getting a grasp on their attitudes and approaches in this time of uncertainties is crucial for understanding real world developments, patterns and trends associated with the region. Becoming a longitudinal analysis due to its series of editions for many years, Balkan Barometer allows to track and discuss changes in the region from different perspectives.

The 2023 Balkan Barometer surveys were conducted between early February and early April 2023 in Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia and Serbia. The Public Opinion survey posed 77 questions to 6027 citizens and the Business Opinion survey presented 80 questions to 1211 business owners, managers, or executives. As in the previous editions, the answers of survey respondents have been systemised, analysed, and presented in the two reports – Public Opinion Survey and Business Opinion Survey.

Each year Balkan Barometer is improved by adapting it to more recent challenges and important issues. For this purpose, in consultation with its experts and partners, RCC makes slight changes to questions in order to increase their potential for understanding and explaining more in-depth developments in the region. The Balkan Barometer is meant to provide very useful data and analysis in some of the key policy areas. The purpose is to equip stakeholders working in these sectors with additional instruments and insights regarding developments in specific economies and at the regional level. This includes policy makers, business associations, researchers and scholars, international organisations and donors, think-tanks, civil society, and any other stakeholder active in the region.

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

KEY FINDINGS

For 2023 the regional Balkan Public Sentiment Index presents some interesting changes compared to the previous year. Though **at regional level there is only 2-point improvement** from the previous year, at the economy level, there are a few developments, dividing the region in two groups. On one hand, Kosovo* and Montenegro have registered an increase of the index (by 6 points each), while the other economies experience a decrease. In the case of North Macedonia, the decline regarding perceptions on the present continues for the third year in a row, losing 10 points since 2020. Perceptions on the future have improved by 3 points at the regional level, with a considerable increase in Kosovo* which has the highest score in the region, followed by Montenegro.

Despite the challenges of the last 12 months, respondents in the region perceive a **slight improvement in their economies**. This percentage has increased most in Montenegro and Kosovo*, while it has deteriorated in North Macedonia. Overall, the most dissatisfied respondents in the region are registered in Bosnia and Herzegovina (60%), followed by North Macedonia (59%).

The economic situation remains the main concern for the region. Albeit a difficult year, there was a slight increase of respondents satisfied with their economic situation, from 20% in 2022 to 22% in 2023. Respondents from Kosovo* and Serbia are the most satisfied, while Montenegro shows the highest growth compared to last year (8 points). Respondents from North Macedonia are the least satisfied (69%), followed by those from Bosnia and Herzegovina (63%) and Albania (60%). Even at their household level, a similar fragmentation can be spotted, with Kosovo* respondents being the most satisfied (43%). Respondents from North Macedonia are the least happy with their personal economic situation with 43% (increase by 6 points from 2022), followed by Albania (42%) and Bosnia and Herzegovina (40%). Regarding expectations for the next 12 months, the less optimistic are again in North Macedonia with only 14% expecting an improvement, against 57% of Kosovo*.

Security has been one of the main themes throughout the past 12 months and it comes as no surprise that respondents in the region feel affected by its challenges. **Only 31% of respondents in the region appreciate their government's measure to tackle security issues**, while 38% are not satisfied. Serbia and Kosovo* are the most reassured about how security challenges are tackled, with 46% each. Meanwhile, the least satisfied are respondents from Bosnia and Herzegovina (54%), North Macedonia (49%) and Albania (44%).

The economic situation and unemployment are the top two problems identified in the region with 47% and 32%, respectively. An exception is Kosovo* where education system is considered the biggest concern (34%). Meanwhile in Albania and North Macedonia, brain-drain is the second most important problem with 41% and 27%, respectively, showing a considerable increase from the last year. About 46% of respondents from the region believe that health sector should also be a top priority for government investments, followed by tackling unemployment and creating job opportunities (37%).

Safety from crime is another evolving concern with 28% at regional level, and highest peak of 39% in Albania. More specifically, regarding illegal possession and misuse of weapons, the most concerned respondents are surveyed in Bosnia and Herzegovina (58%), while respondents from Serbia appear the least concerned with 69% feeling safe from them.

Half of respondents agree that relations in the region have improved over the past year. However, responses are quite fragmented when asked what they associate the region with. About 20% thinks of hope and 19% about cooperation, while 13% thinks of conflict and 12% of doubts.

About 69% of respondents from the region believe that what brings them together is more important than what divides them. The strongest support for this statement is in Albania (86%), while the lowest, though still majority, is in Bosnia and Herzegovina (57%).

More than three quarters of respondents (76%) have a positive attitude towards the impact that regional cooperation can have on their political, economic and security situation. Respondents from Albania are the biggest supportive of this position, while respondents from Bosnia and Herzegovina are more sceptic, although with a broad majority in favour (67%).

EU membership is a strategic priority for the region and overall support for the process (59%) has remained the same as in 2022 (60%). However, there are some sharp differences amongst the economies. Albania respondents are confirmed as the most supportive of EU membership, reaching 92% this year, and only 1% of respondents are against membership. Despite both Albania and North Macedonia starting accession negotiations in 2022, the latter shows a decrease by 6 points in terms of support. In Kosovo* there is also a drop of support by 7 points. The lowest level of support remains in Serbia (34%), which decreased further by 4 points from 2022, maintaining a decreasing trend.

Economic prosperity is the most expected benefit from EU membership at a personal level (40%), while freedom to study and work is at the second place (29%) followed by peace and stability at third place (24%), sharing this position with the freedom to travel.

More than a third of respondents believe that EU membership will be achieved by 2030, while another 32% aim for 2035. However, a share of 23% thinks that their economy will never join the Union, though decreasing by 5 points compared to last year. The more optimistic respondents are in Kosovo* with 57% claiming 2030 as the expected membership year, while 40% of respondents from Serbia believe their economy will never join, followed by North Macedonia (37%).

The most important factor for getting ahead in life and finding a job is knowing the right people according to 27% of respondents from the region. Second placed is the importance of personal contacts, network, and family (19%). However, a quarter believes that having a good education or the right skills can also help. Education is mostly selected by respondents from Albania (27%), while hard work is considered as the main factor (32%) in Kosovo*.

When discussing employment, most of respondents would prefer working in the public sector (28%) and another 25% in public companies and only 20% choose the private sector. The most favourable option in Bosnia and Herzegovina is the public sector (35%), while respondents from Kosovo* choose the private sector (37%). Safety of the job is the main reason for choosing the public sector (59%) followed by better working conditions (41%) and better salary (35%).

There is an overall positive perception on the role of education system, with a total of 72% of those who support its effectiveness in equipping with the necessary skills. At the economy level, respondents from North Macedonia agree the most on the education system's role (77%), with 5-point increase from the last year. Respondents from Bosnia and Herzegovina are the most sceptical regarding the role of their education system, with more than a third claiming so (36%). **Interpersonal and communication skills (32%), foreign language skills (30%) and digital competences (30%)** are considered the most important competences for advancing in their work. However, more than 80% of respondents have not participated in any activity for learning new skills during the past 12 months.

The region has experienced considerable progress in terms of social inclusion. Measures in support of disadvantaged categories or minorities to enter the labour market are opposed especially in Bosnia and Herzegovina, Kosovo* and North Macedonia.

Regarding gender discrimination, respondents from the region state that **the most concerning issues are prejudice about the image and role of women in society (42%) and the pay gap (41%)**. Prejudices are perceived as a more urgent matter to tackle in Albania (61%), followed by North Macedonia (45%), and Serbia and Montenegro (38% each), with a large gap from the first place. Concerns regarding women being paid less than men are higher in Kosovo* (70%), followed by Albania (47%). **Addressing the pay gap between genders is the most requested intervention at the regional level (44%)**. Around 61% of respondents from the region do not have preferences regarding the gender of their supervisor or employer. RCC's study on "Women entrepreneurship in the Western Balkans"[1] highlights how stereotypes affect many spheres of women's life, including embarking on a new career, starting a business, etc.

In the WB, internet is used mostly for communication (67%), entertainment (52%) and for following the news (51%). Meanwhile 45% use it for work and business purposes. Facebook remains the most used social media platform in WB with 46% (same as in 2022). Instagram has lost 4 points from the previous year, reaching 28%. **At the regional level, the safety of children and cyberattacks were the two main concerns with 47% and 41%**, respectively, while online payments are third (30%).

A quarter of respondents from the WB consider phone costs very high when travelling to the EU.

The EU is the first destination for WB citizens who would like to live abroad (68%). **The majority (69%) of respondents from the region would not consider living and working in another economy of the region**. Respondents from Albania and Serbia are the most opposed to this option, by 83% each (7 points of increase for Albania and 3 points decrease for Serbia).

Most of the respondents have not travelled once in the region in the past 12 months (57%), with respondents from Albania and Serbia having travelled the least (65% and 64%, respectively). About 69% of those who travelled in the last 12 months in the region did so for tourism activities and holidays, showing an important increase of 18 points compared to 2022.

Generally, respondents from the **WB appreciate and welcome foreign companies, appreciating the benefits they might bring into their economy (47%)** Disagreement is most present in Serbia (36%) and Bosnia and Herzegovina (31%). Respondents from Montenegro show the highest support to increasing regional economic integration with 71%.

While in the 2022 report an overall share of 67% of respondents in the region considered climate change a serious problem, this year it dropped to 49%. Only 31% did not see climate change as a problem last year, against 49% this year. **Air pollution is considered the biggest environmental concern by 57% of respondents**, followed by water pollution (44%) and soil pollution (39%).

When asked regarding their worries on the energy related issues, respondents from the region pointed out that **rising energy costs is the main concern (45%)**, followed by 16% worried about energy security (availability). More than a quarter of respondents (26%) do not see energy as an important concern. Three greatest barriers to making a green transition are: lack of awareness in the region (54%), lack of financial capacities (52%), and lack of will power by decision-makers and population (51%).

1 Regional Cooperation Council (2023) "Women entrepreneurship in the Western Balkans: Stocktaking on constraints and good practices" 19 May. Available at: https://www.rcc.int/pubs/158/women-entrepreneurship-in-the-western-balkans-stocktaking-on-constraints-and-good-practices

About 28% of respondents from the region claim to use online public services, which is 2 points higher than in 2022. Meanwhile, 30% (8 points more from last year) confirm the existence of such services in their economy but they are not able to use them. Almost half of respondents from the region (48%) prefer to obtain public services physically, showing a rather high level of scepticism regarding online services. Digital literacy is at the top of obstacles for 42% of respondents, followed by lack of information (33%).

About a quarter of respondents from the region (26%) are strongly convinced that the rule of law is not applied effectively in their economy, while another 35% also tend to agree with this statement. About 69% of respondents tend to disagree or fully disagree with the claim of everyone being equally treated by the law in their economy (same as in 2022). Respondents from Kosovo* are the happiest with how the law is applied in their economy, with 61% overall supporting the statement (4 points more than in 2022). Respondents from Albania are on the other end of the perception, with 87%.

Political parties are the least trusted institutions in the region, with 39% expressing total distrust and another 36% tending not to trust. The military of the region is doing slightly better than all the rest, with overall 54% of respondents trusting or tending to trust it. Police follows in the second place with 45% of general trust. As a general observation, mistrust is quite high in North Macedonia and Bosnia and Herzegovina, while respondents from Kosovo* have the highest trust.

The judicial system is considered the most problematic in terms of independence from politics. Media follows in the second place as the least independent institution from political influence with 64%. About 40% of respondents agree or tend to agree that the military in their economy is independent from politics, and 38% think the same regarding the Ombudsman (same as last year), both being at the highest shares.

There is an **equally widespread level of mistrust in the region amongst different proposed sources of information**, with the minor exception of people and groups of friends followed on social media. Public TV is the most trusted source (45%) though with a minor difference from the other sources. Trust is quite high for private TV in Kosovo* with an overall share of 65%. In Montenegro, we also find the least trusted source, which is social media, with 70%.

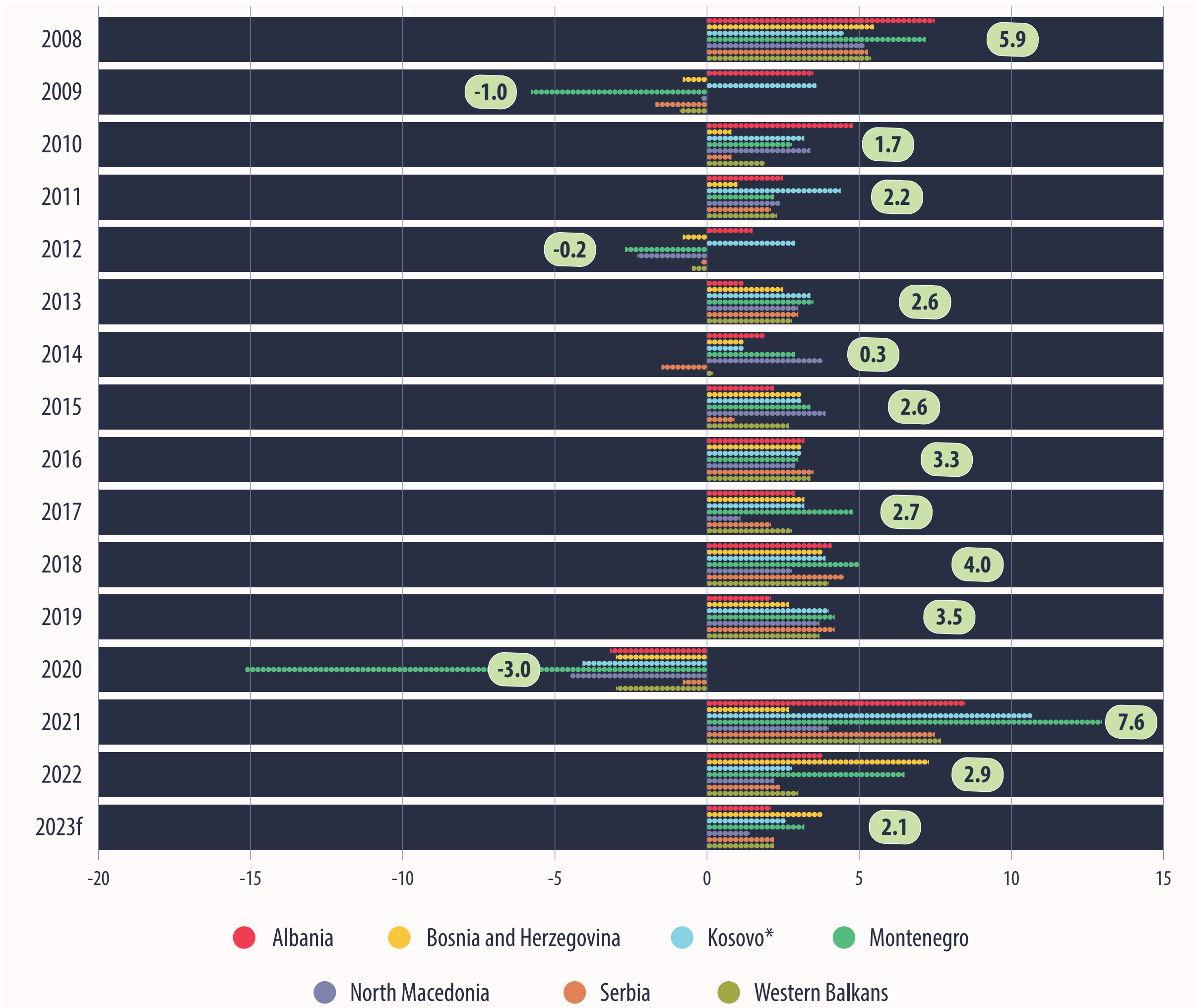
Respondents express concern regarding the spread of fake news in their economies, with 65% claiming that they have increased in the past 12 months. Shares of respondents range from 56% in the case of Kosovo* up to 73% in North Macedonia, followed by Montenegro in the second place (71%).

REGIONAL OVERVIEW

After starting a consistent recovery from the difficult post-pandemic period, the WB economies experienced a drop in their economic growth rate. The war in Ukraine and its repercussions were the major factor for the economic trajectory of the region during 2022. Although economies of the region differ between them in terms of dependence from economic exchanges with Russia and Ukraine, the impact has been considerable across the WB. Growth rate went from 7.6% in 2021 to less than 3% in 2022. Projections for 2023 seem to confirm the declining trend, with the region expected to grow only by 2.1%.

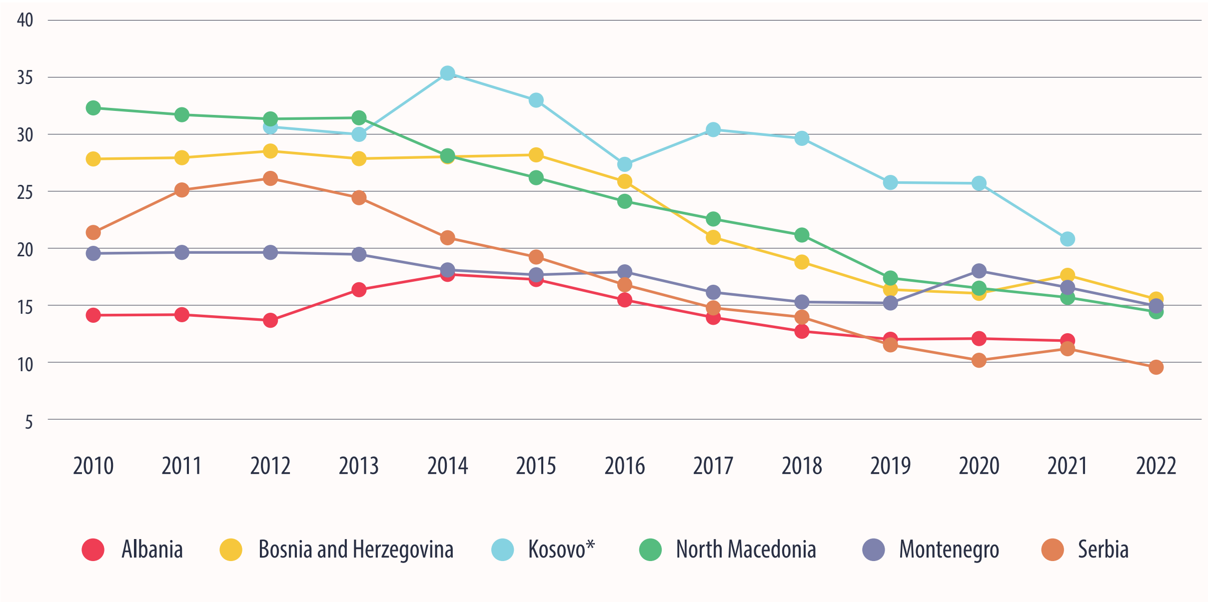
When exploring individual economies, Montenegro maintained a good growth pace in 2022 (6.4%), followed with a considerable distance by Bosnia and Herzegovina (3.8%) and Albania (3.7%). North Macedonia recorded the lowest level of economic growth rate at 2.2%, (expected to drop to 1.4% in 2023). This year is expected to be characterised by an annual growth with less variations amongst the economies when compared to 2022. Kosovo* is expected to have the highest growth rate (3.5%), followed by Montenegro which will drop by 3.2 points compared to last year (reaching 3.4%).

Figure 1: Real GDP Growth in the Western Balkans 2008-2023
(Source: IMF World Economic Outlook, WB GDP weighted average growth rate)



Despite the economic repercussions from the war in Ukraine and the slowing of economic growth in 2022, unemployment rates in the region have experienced a slight improvement (though still remaining almost double of the EU average). After the pandemic-related lockdown in many sectors, the recovery during 2021 and early 2022 demanded rekindling of economic activities and, therefore, requiring new labour force. Last year, Serbia has recorded the lowest level of unemployment at 9.7%, which is 1.7 points less than the previous year. Data for Kosovo* are not only available for 2022 yet, but the year before it had the highest unemployment in the region (20.7%). This year, Bosnia and Herzegovina is at the first place with 15.5%, 2 points of improvement from 2021. Kosovo* and Bosnia and Herzegovina lead the region in terms of women unemployment, respectively, with 25% (2021) and 19.9% in 2022.

Figure 2: Unemployment rates in the Western Balkans, 2010-2022
(RCC ESAP 2 Observatory on employment; % of the labour force; LFS, 15-64 age group)



BALKAN PUBLIC SENTIMENT INDEX

The Balkan Public Sentiment Index (BPSI) is an instrument used to observe the changes of citizens' sentiment over time, which allows to capture changes and to compare between periods and economies. BPSI measures the respondents' current state of affairs and their expectations for the future in terms of the economic situation in the society as well as in their individual households. It monitors changes over time starting from the level of individual economies up to the regional level.

The index is structured in a six-point scale with answers for Q1 to Q4 scoring as follows: I'm completely dissatisfied - 0 points, I'm mostly unsatisfied – 25 points, neither satisfied nor dissatisfied – 50 points, I'm mostly satisfied – 75 points, I'm completely satisfied – 100 points. BPSI consists of two sub-indexes, BPSI-Present Situation Index and BPSI-Expectation Index, which separately observe the present sentiment and future expectations of respondents from the region. Afterwards, BPSI results are compared to the results of the previous cycles at regional and economy levels separately.

For 2023, the BPSI registers a variety of responses in different economies, going from a highest peak in Kosovo* with 61 (followed by Montenegro and Serbia with 50) to the lowest in North Macedonia with 35 (Figure 3). Overall, the WB economies score at 47, presenting a slight increase of 2 points compared to 2022. When it comes to expectations for the future, the index shows a relatively optimistic picture in Kosovo* and Montenegro, with scores of 71 and 60 respectively. Figure 4 shows that economies with the highest change of BPSI score from the previous year are Kosovo* and Montenegro (with 6 points improvement each), while North Macedonia and Serbia have experienced a lower score (with 4 points and 2 points less, respectively).

Figure 3: Balkan Public Sentiment Index (BPSI) - 2023
(Scores on a scale from 0 to 100)

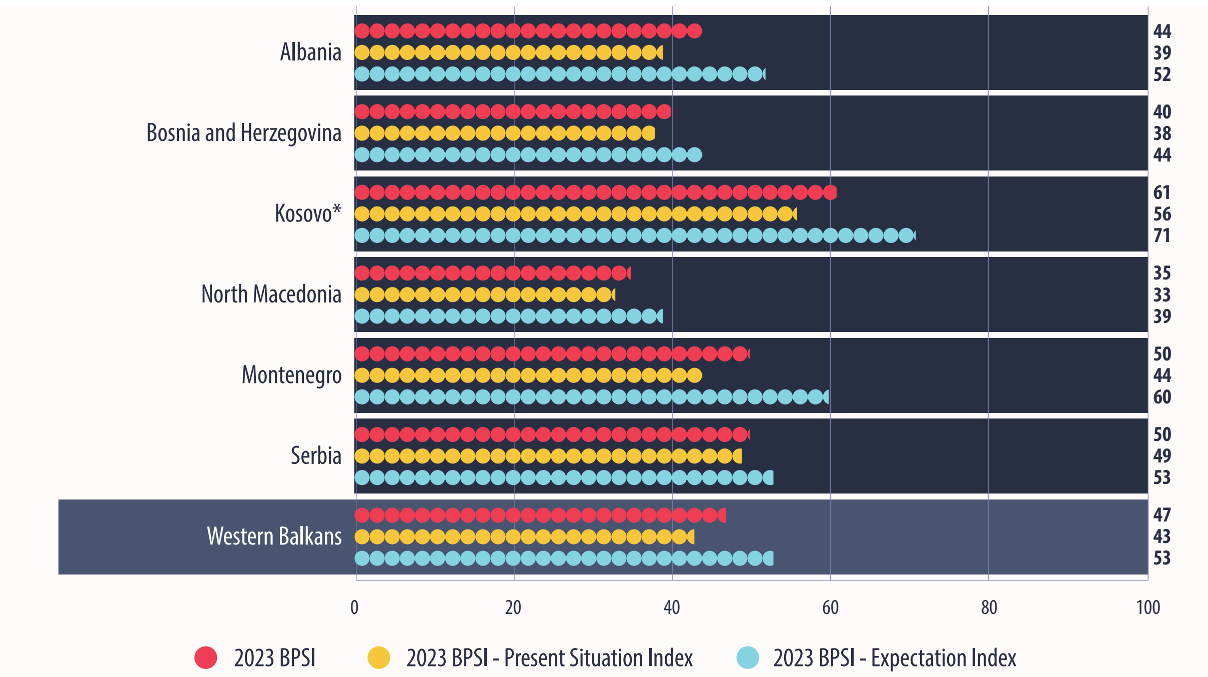
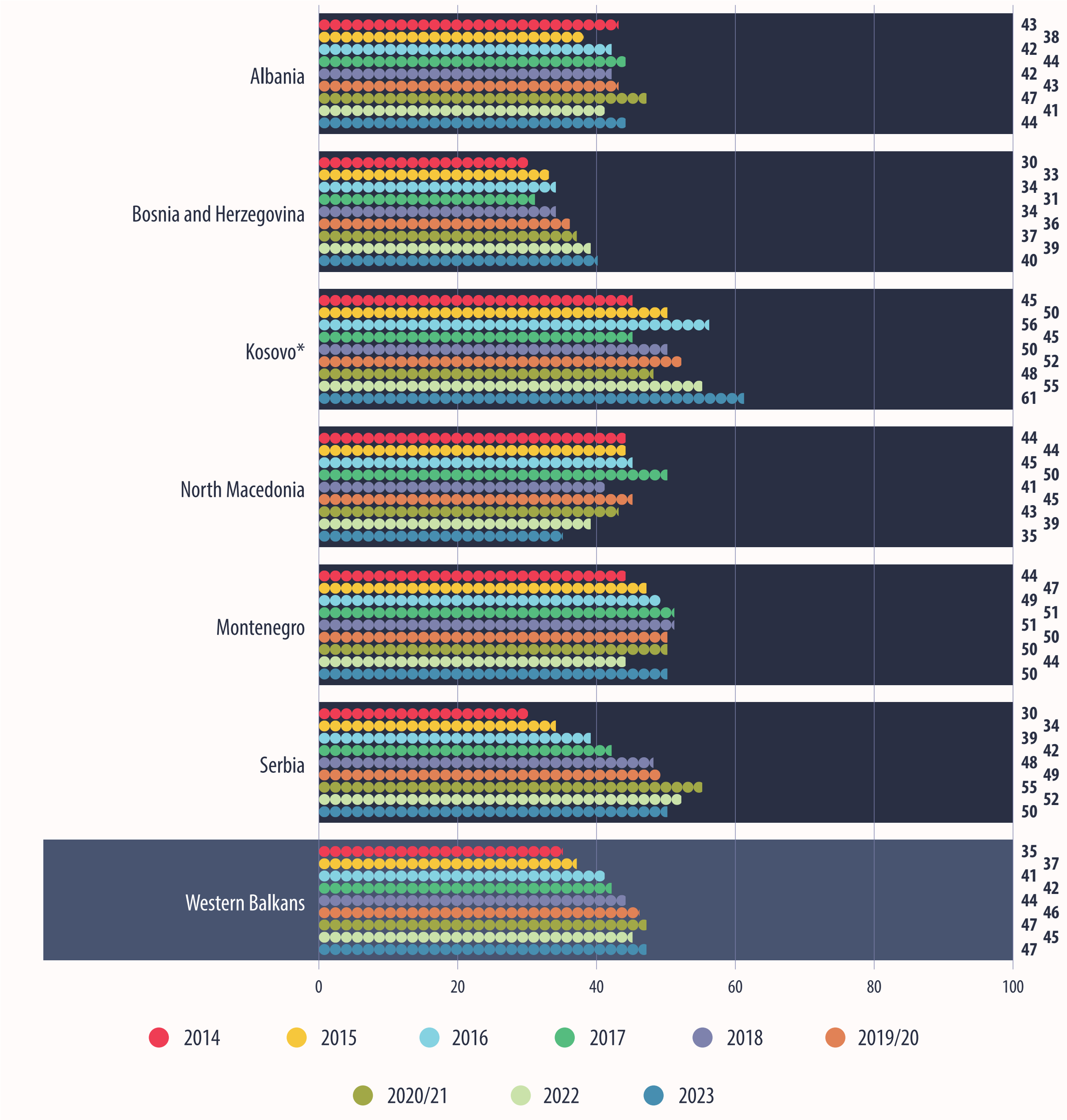
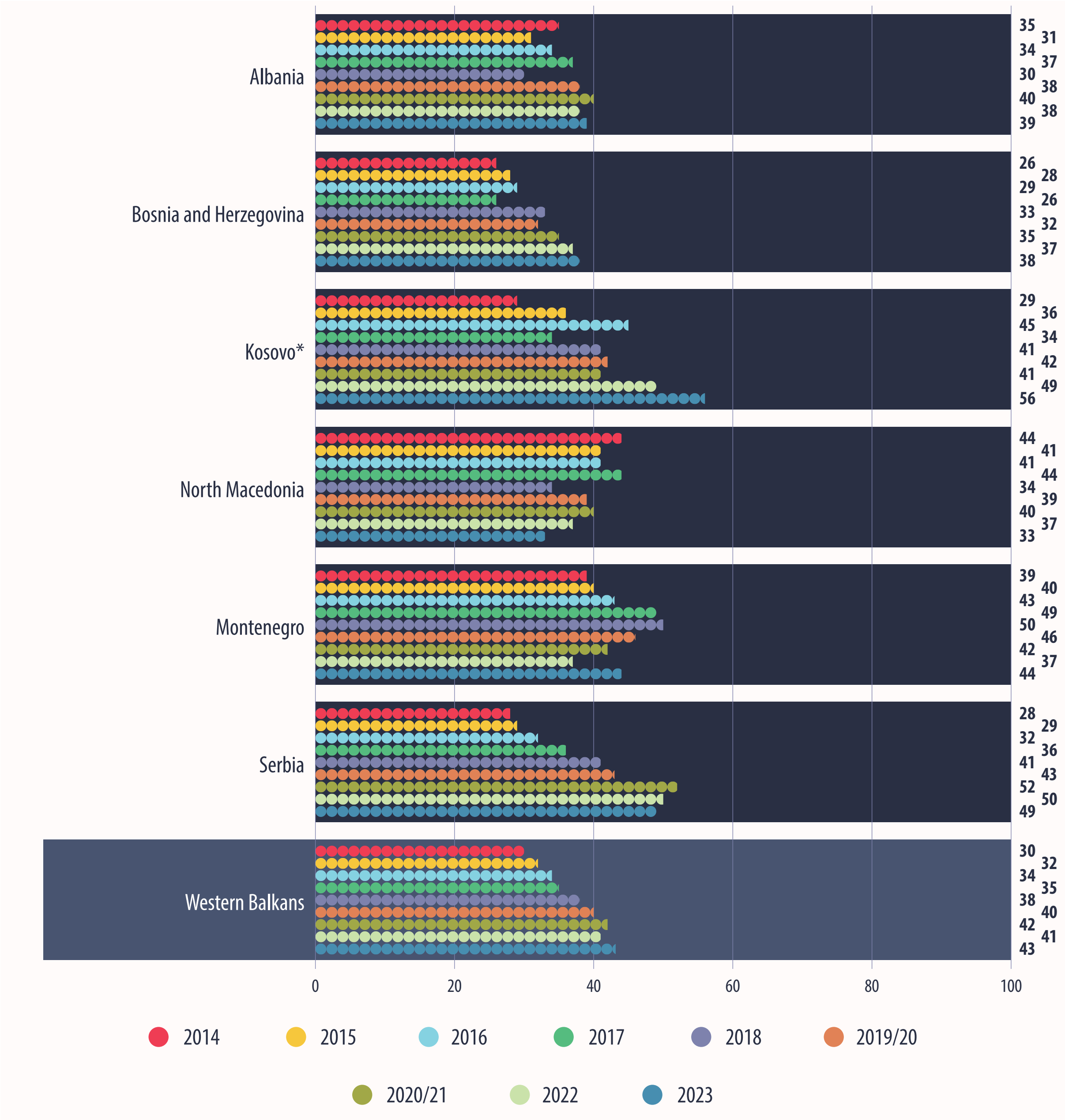


Figure 4: Balkan Public Sentiment Index (BPSI) – comparison 2014/2015/2016/2017/2018/2019-20/2020-21/2022/2023
(Scores on a scale from 0 to 100)



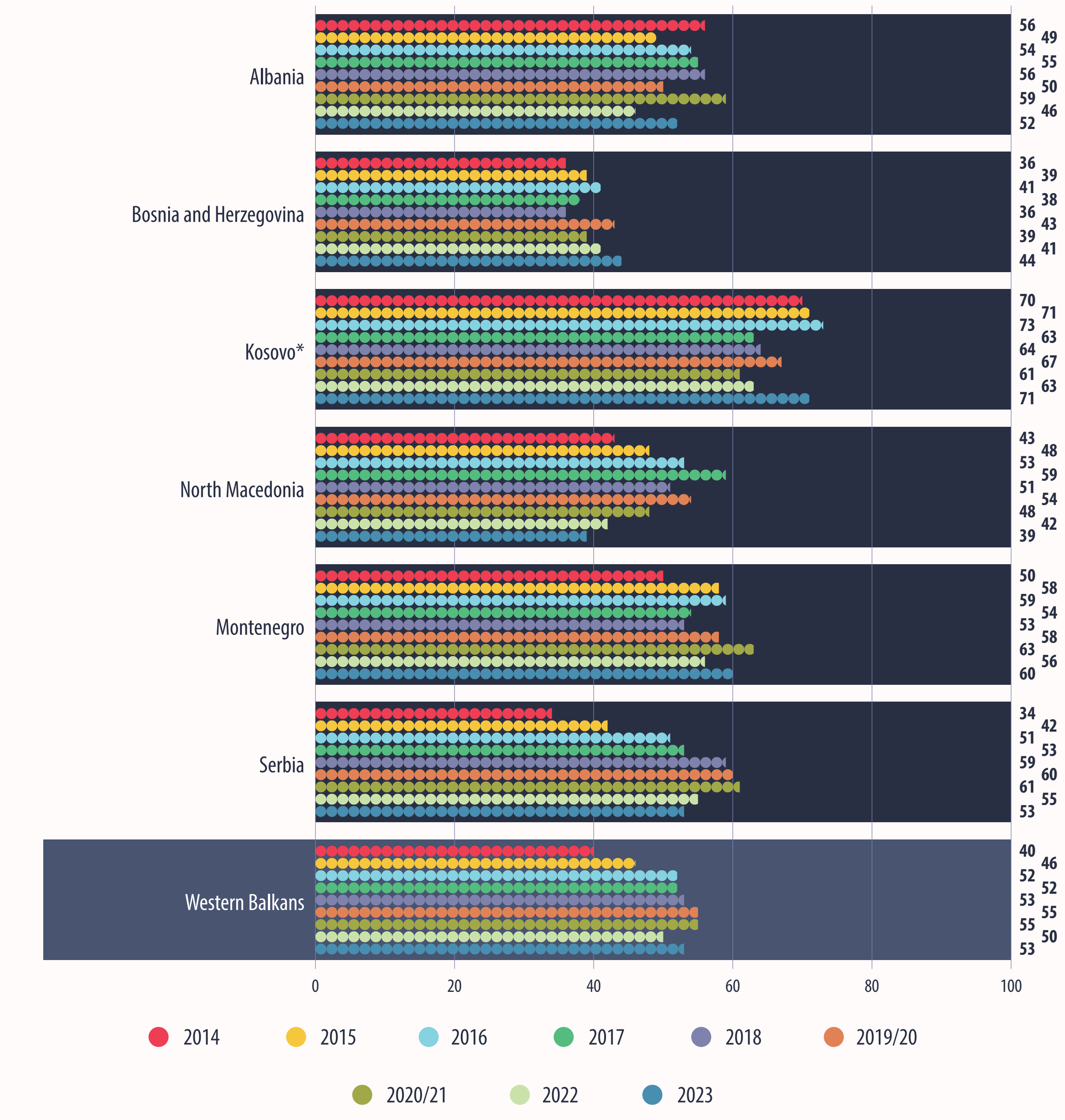
When asked about present situation, respondents from North Macedonia appear to be the least satisfied, reaching only a score of 33 points. This decline in perception regarding the present has started in 2021 and continues for the third year in a row, losing 7 points (Figure 5). On the other hand, a considerable improvement in the perception of the present situation is manifested by respondents from Kosovo* and Montenegro, both with a 7-point increase relative to the previous year. The only economy having experienced a (minor) decrease from previous year is Serbia with 1 point. However, the general trend of respondents from Serbia has been increasingly positive in the past years, until 2021.

Figure 5: Balkan Public Sentiment Index (BPSI) - Present Situation Index – comparison 2014/2015/2016/2017/2018/2019-20/2020-21/2022/2023
(Scores on a scale from 0 to 100)



Perceptions on the future and expectations have changed almost each year in all economies. The overall score for the region is at 53, showing an improvement of 3 points from 2022, after a drop of 5 points from 2021. Respondents from Kosovo* are the most optimistic regarding future expectations, both in absolute terms (71) and as compared to the previous year (8 points of increase). Montenegro follows with a score of 60, recovering the drop of 7 points in the previous period.

Figure 6: Balkan Public Sentiment Index (BPSI) – Expectation Index – comparison 2014/2015/2016/2017/2018/2019-20/2020-21/2022/2023
(Scores on a scale from 0 to 100)

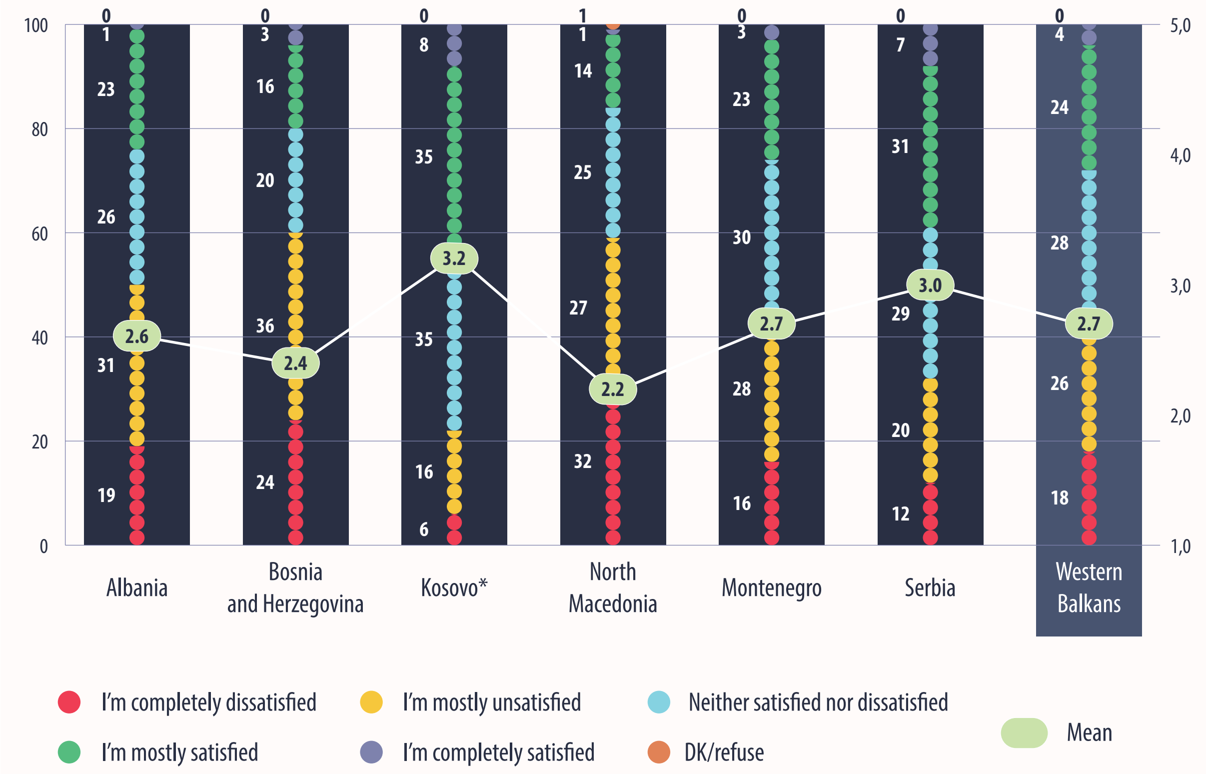


LIFE SATISFACTION AND ASSESSMENT OF GENERAL TRENDS

Amidst a rather difficult year due to the consequences of the war in Ukraine and despite inflation and economic challenges, perceptions of respondents on general life satisfaction in the region reflect a slight improvement compared to the previous year (see Figure 7). Almost a quarter of respondents (24%) are mostly satisfied with the way things are going in their economy, registering an increase of 2 points compared to 2022. A similar increase is observed for those who are completely satisfied (though at very low levels, reaching 4%, from 3% of 2022). On the other hand, there is a decrease in the other two categories (completely unsatisfied down by 2 points and mostly unsatisfied down by 3 points). The percentage of respondents who claim neutrality to this question has increased by 3 points as well, from 25% in 2022 to 28% on current year.

When considering the answers to the question in Figure 7, it is important to analyse differences between economies. The biggest difference, compared to the previous year, regarding the mostly satisfied respondents can be spotted in Montenegro, where this category has increased to 23%, while it was only 11% in the previous year. On the other hand, when referring to the completely dissatisfied respondents, North Macedonia and Kosovo* present the largest changes, though in different directions. While in North Macedonia the share of completely dissatisfied respondents experienced an increase by 10 points compared to 2022 (from 22% to 32%), Kosovo* saw a decrease by 9 points, going from 15% in 2022 to only 6% in 2023. Respondents from Kosovo* are overall the most satisfied respondents in the region, with 43% claiming to be completely and mostly satisfied with how things are going in the economy. Respondents from Serbia follow, with 38%, while the less satisfied (mostly and completely dissatisfied) are respondents from Bosnia and Herzegovina (60%), followed by North Macedonia (59%).

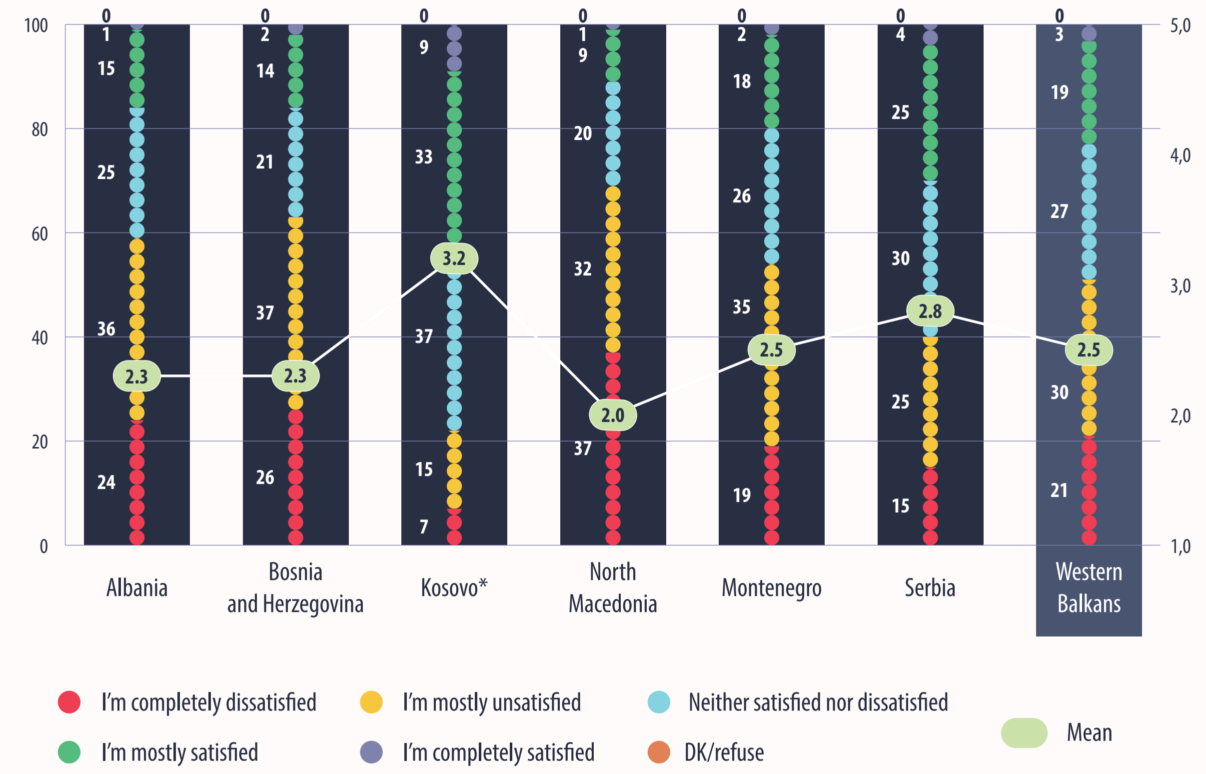
Figure 7: How satisfied are you with the way things are going in your economy?
(All respondents, N=6027, single answer, share of total, %)



As in the previous editions of the Barometer, economic situation is often the major concern of the region's respondents. This is confirmed by Figure 8, where respondents in the region were asked specifically on the level of satisfaction with the economic situation in their economy. Compared to 2022 responses, this year saw a considerable increase in both completely unsatisfied and mostly unsatisfied categories (by 7 and 6 points respectively), with more than half of respondents having given one of these two responses. Overall satisfaction has lost 11 points (from 33% in 2022 to 22%). These results are directly linked to the difficult 2022 that the region has gone through, especially in terms of high inflation and the economic impact of the war in Ukraine.

A third of respondents from Kosovo* and a quarter of respondents from Serbia are mostly satisfied with the economic situation, presenting the highest figures in the region, followed by Montenegro with 18%. Apart from Montenegro, which experienced an increase of 8 points in this satisfaction compared to the previous year, respondents from Kosovo* and Serbia have maintained similar levels as in 2022, showing a higher appreciation of the economic situation of their economy. However, both economies register the highest shares of neutral respondents to this question, with 37% and 30%, respectively. The other economies in the region present considerably high level of dissatisfaction, with North Macedonia on the lead reaching almost 70% of overall respondents being unhappy with the economic situation. Bosnia and Herzegovina and Albania follow with 63% and 60%, respectively. The expressed perceptions of dissatisfaction in these economies are almost the same as in 2022, with minor changes.

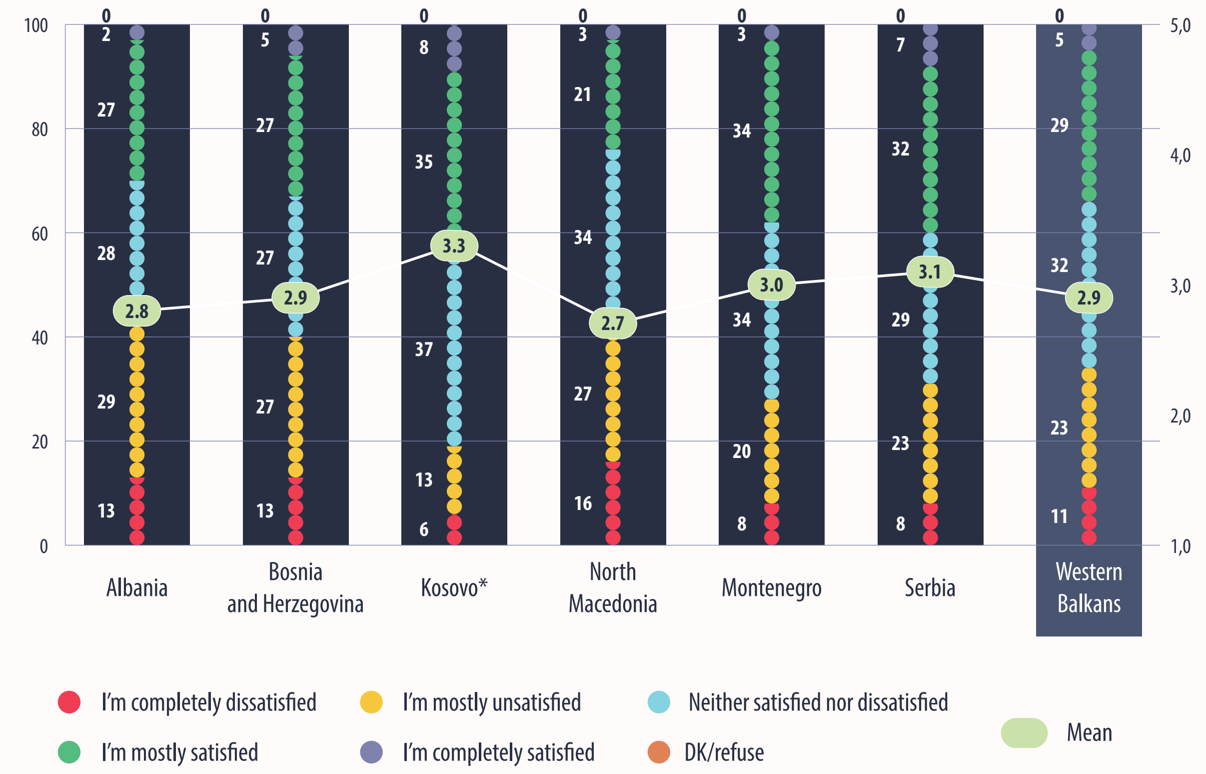
Figure 8: How satisfied are you with the economic situation in your economy?
(All respondents, N=6027, single answer, share of total, %)



With reference to the financial situation of their household specifically, Figure 9 shows that respondents from the WB are divided in almost equal parts in terms of their levels of satisfaction. While 34% express overall satisfaction, and 34% are generally dissatisfied, the remaining one-third (32%) is neutral, claiming to be neither satisfied nor dissatisfied. This fragmentation is very similar to the previous year, and it is manifested the same in almost all economies. At the front of the line of respondents least dissatisfied with their financial situation we find Kosovo* with only 19% representing this category. This share has decreased by 12 points compared to 2022, showing a considerable improvement in perceptions amongst the respondents from Kosovo*. Though with a decrease of 5 points, representatives of this economy are also the most satisfied overall, reaching 43% this year.

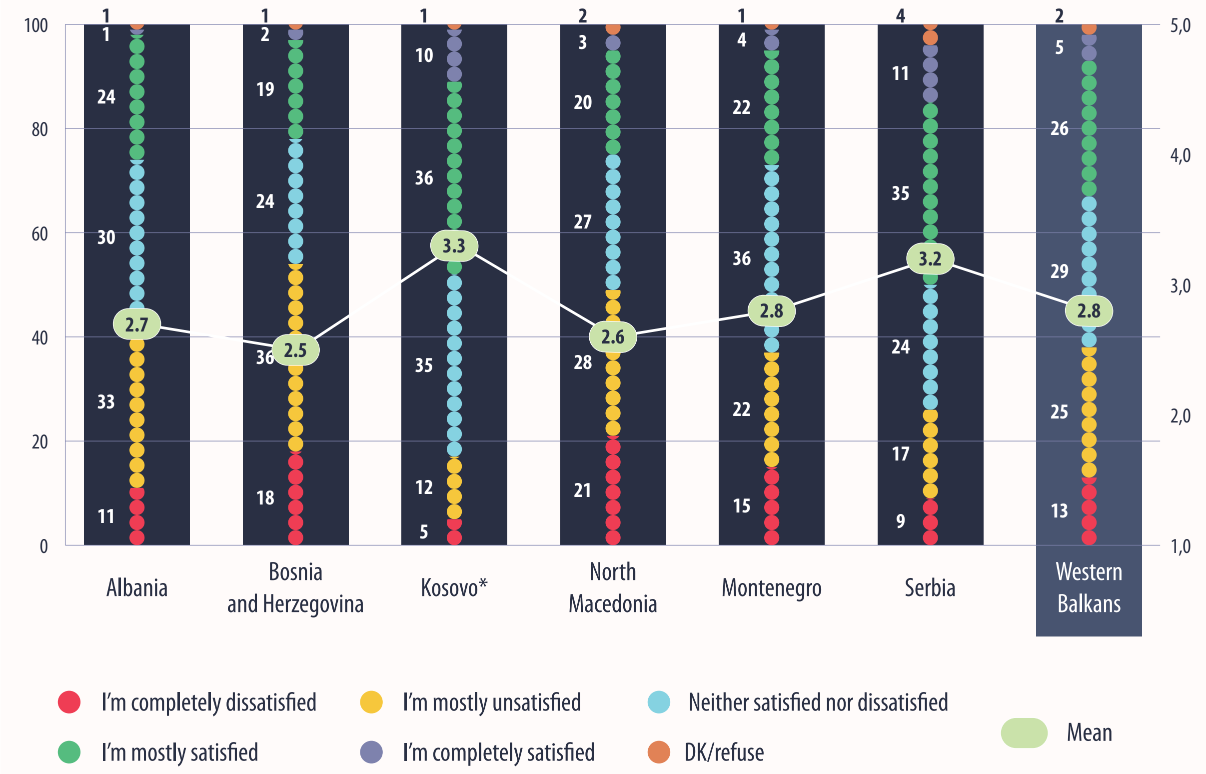
At the other end of the spectrum, the most dissatisfied respondents are to be found in North Macedonia with an overall share of 43%, followed by Albania (42%, same as in 2022) and Bosnia and Herzegovina (40%). In both North Macedonia and Bosnia and Herzegovina the share of respondents unhappy with the financial situation of their household has increased compared to 2022 (by 6 and 4 points, respectively).

Figure 9: How satisfied are you with the financial situation of your household?
(All respondents, N=6027, single answer, share of total, %)



Security concerns and how their economy has tackled them were in the focus of the following question, with results displayed in Figure 10. Despite the war in Ukraine and related perceptions of insecurities, this year's Barometer presents almost the same responses as in 2022. Again, a rather equally fragmented sample is represented at the regional level, with almost a third (31%, 2 points less than in 2022) expressing overall satisfaction with how security challenges are tackled in their economy. The share of those who are generally dissatisfied is larger, reaching 38% (3 points more than in 2022), while 29% of respondents do not see convincing reasons to be neither satisfied nor dissatisfied, being at the same level as in the previous year. At the economy level, respondents from Montenegro are the least certain in replying to this question, with 36% of them maintaining a neutral position, followed by Kosovo* with 35%. The most satisfied respondents overall are to be found in Serbia and in Kosovo*, both at 46% of share. While this share presents a decrease by 7 points compared to last year for Kosovo*, there is no change in Serbia. On the other side, the least satisfied respondents regarding the way security challenges are tackled are found in Bosnia and Herzegovina (54%, overall), followed by North Macedonia (49%) and Albania (44%). Both the latter economies have experienced an increase in the share of respondents who express concern regarding measures for security challenges, by 4 and 13 points, respectively.

Figure 10: How satisfied are you with the way your economy tackles security challenges?
(All respondents, N=6027, single answer, share of total, %)

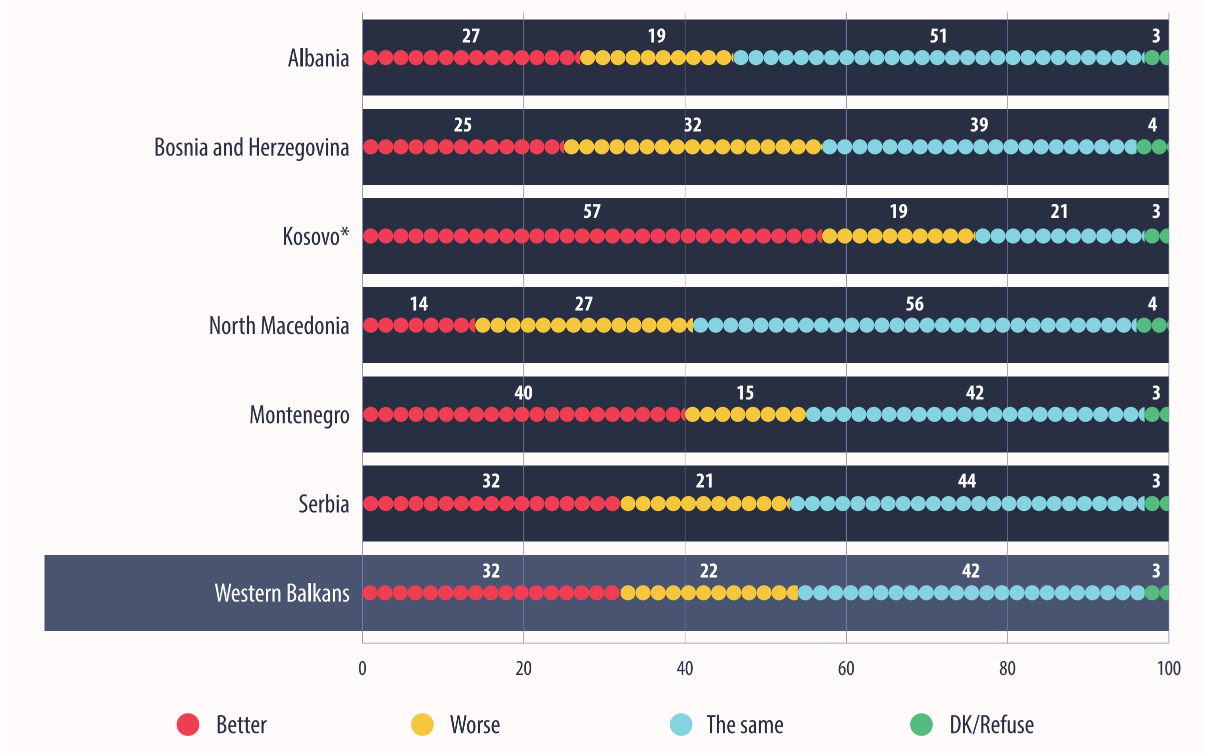


In terms of expectations of their financial situation in one year, a relative majority (42%) of respondents from the region foresee no significant change (Figure 11). This response is almost at the same extent as last year, with only 2 points of decrease, showing a pattern of low expectation for major shifts in their financial affairs. While the share of those expecting a deterioration has decreased only by 1 point (from 23% to 22%), there is an encouraging increase of those more optimistic which went from 29% in 2022 to 32% this year.

Same as in 2022, the most pessimistic respondents are from North Macedonia, with only 14% claiming to expect an improvement of their financial situation in the next 12 months. This category decreased further this year, losing 5 points when compared to the previous year. On the other hand, the most optimistic answers were registered in Kosovo* with a large share of 57% showing trust that in the next 12 months their finances will be better. This share represents a considerable jump from 2022, increasing by 21 points. In Kosovo*, the share of those who expect no change was reduced drastically when compared to the previous year, going from 52% to 21%.

If looking at the category of worsening expectations, respondents from Bosnia and Herzegovina are at the top this year again, reaching 32% (from 33% in 2022). More than half of respondents from North Macedonia (56%) and Albania (51%) expect no change, presenting slight increase from 2022 (by 4 and 3 points, respectively).

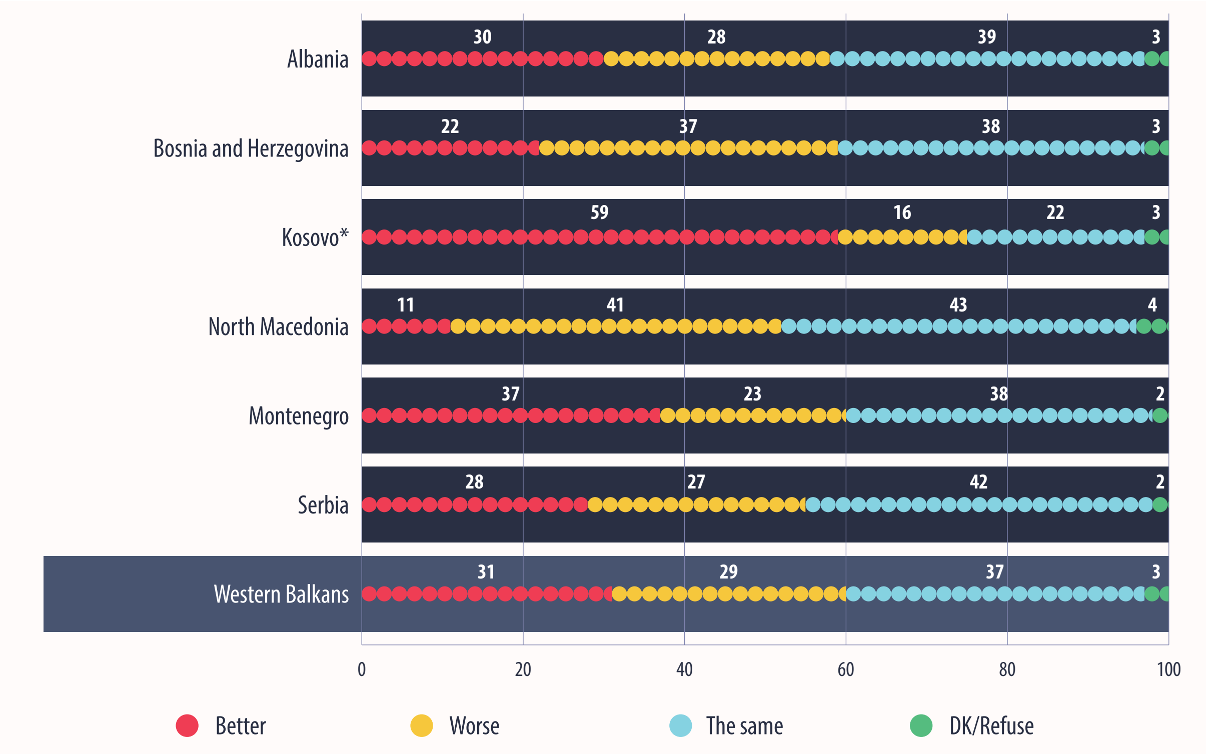
Figure 11: What are your expectations for your financial situation? Do you think that in 12 months your financial situation will be:
(All respondents, N=6027, single answer, share of total, %)



Expectations of respondents regarding the overall economy trajectory in 12 months follows similar patterns as when asked about their personal financial expectations. Answers collected constitute three groups of similar shares (Figure 12), with a relative majority stating that they do not foresee any change (37%). Another 31% of the respondents from the region are optimistic and believe that the state of the economy will improve, while 29% expect a deterioration. When compared to the previous year, there are no major changes registered, except a slight improvement of optimism (by 3 points) and a decrease in pessimism by three points.

At the economy level, again Kosovo* respondents mostly expect improvement, at 59% (10 points higher than in 2022), against 41% of respondents from North Macedonia (same as in 2022) who foresee their economy worsening. In the other economies of the region distribution of responses is at similar levels amongst each category.

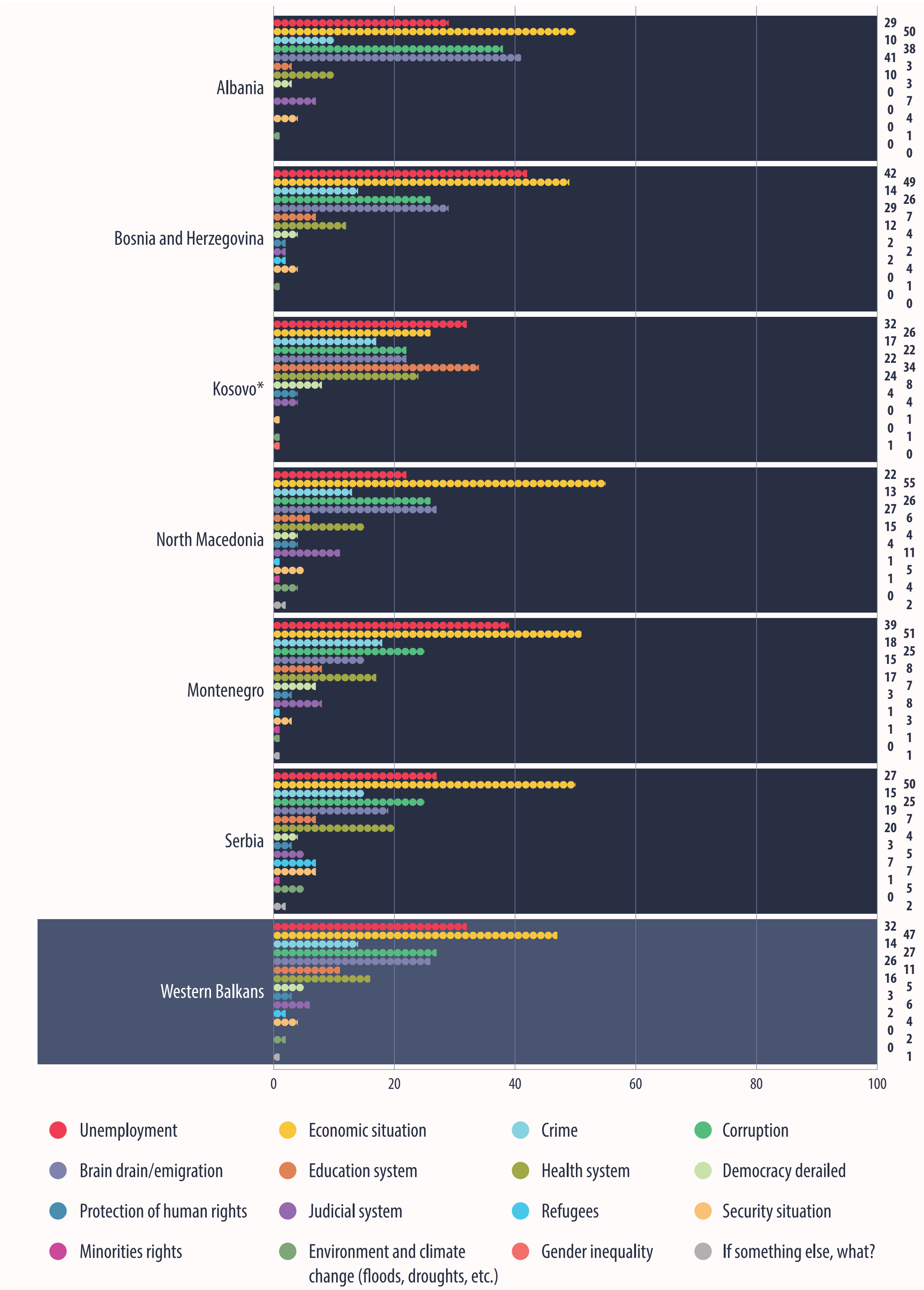
Figure 12: What are your expectations for your economy? Do you think that in 12 months the state of the economy will be:
(All respondents, N=6027, single answer, share of total, %)



The economic situation and unemployment remain the two most important problems identified by respondents from the WB, with 47% and 32%, respectively (Figure 13). While economic situation has been selected by the exact same share of respondents as in 2022, unemployment has dropped by 7 points compared to the previous year. The economic situation is the main concern in all economies, except Kosovo* where education system is considered the main problem (34%), followed by unemployment (32%).

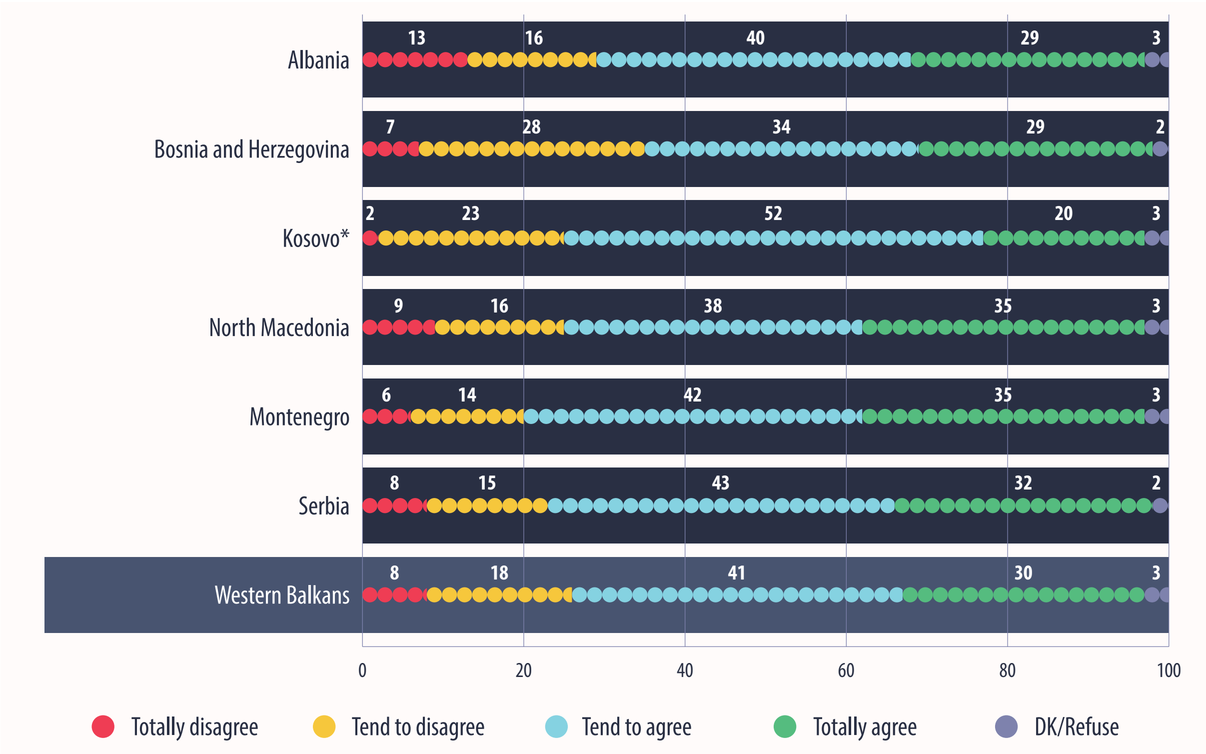
Brain-drain is seen as the second biggest problem in Albania, at 41%, increased by 12 points compared to 2022. This concern might be related to the new waves of migration affecting Albania during 2022, and experiencing a very high increase of asylum requests in the EU and the UK from citizens of Albania. Brain-drain is also a problem for respondents from North Macedonia, placing it in the second place with 27% (7 points higher than in 2022). In Bosnia and Herzegovina 29% of respondents have placed brain-drain as the third biggest problem, increasing by 8 points.

Figure 13: What do you think are the two (2) most important problems facing your economy?
(All respondents, N=6027, maximum 2 answers, share of total, %)



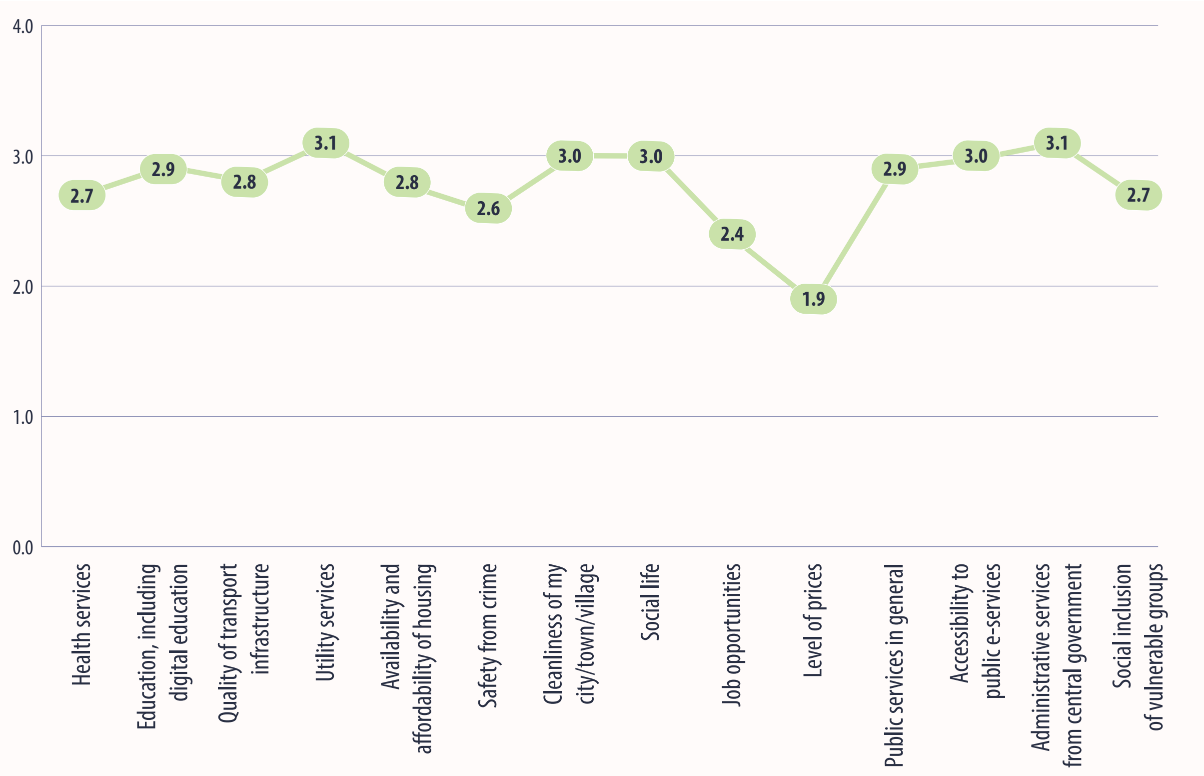
As economic data for 2022 has showed, the war in Ukraine has affected world economy at large, especially in terms of shortage of energy and inflation in consumer goods, including food. The WB has been no exception and Figure 14 tries to capture perceptions of respondents from the region on the impact of the war on their purchasing power. A solid majority of 71% thinks that their purchasing power has been negatively affected. Only 8% disagree totally with this statement, and another 18% tend to disagree. Shares of respondents are very similar across economies of the region, with Bosnia and Herzegovina presenting a slightly lower concern on the purchasing power (63%) than the region's average. Respondents from Montenegro are at the other end with 77% perceiving an impact on their purchasing power.

Figure 14: To what extent do you agree or disagree with the following statement: "Shortage of energy and rising food prices as a result of the war in Ukraine have a significant impact on your purchasing power"?
(All respondents, N=6027, single answer, scale from 1 to 4, share of total, %)



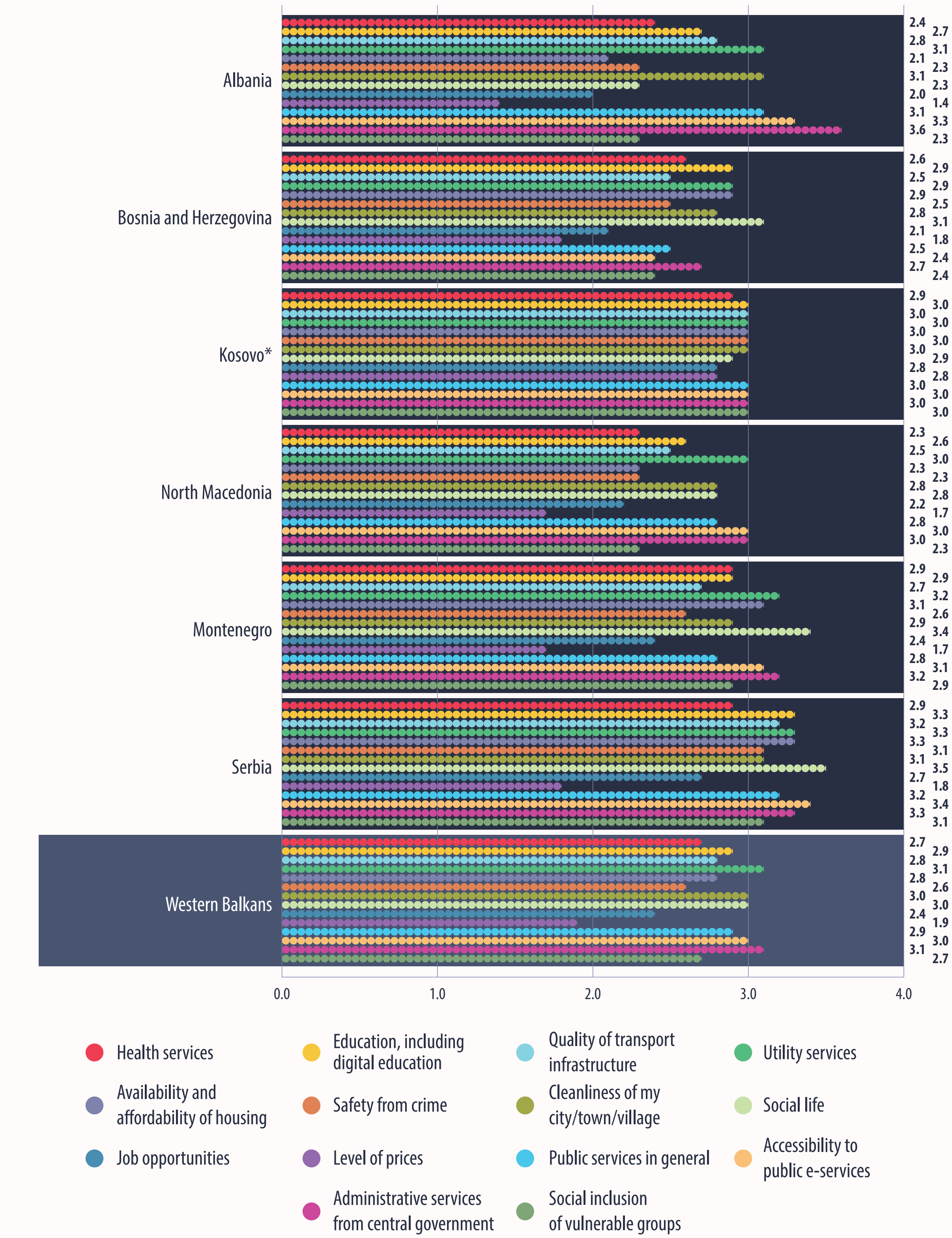
Concerns regarding inflation are confirmed by Figure 15. When asked about the level of satisfaction in some of the most important areas, as in 2022, the level of prices registered the worst score with only 1.9 points (with a slight increase of 0.1 compared to the previous year). Job opportunities is the second worst placed component, being assigned 2.4 points in terms of the level of satisfaction (also improved by 0.1 compared to 2022). Utility services and administrative services from the government are at the relatively higher position in the graph, with 3.1 points each. Despite these differences between categories, overall, there is a similar level of satisfaction across them, which remains similar to the previous year.

Figure 15: Could you please tell me how satisfied are you with each of the following in your place of living? (Results for Western Balkans)
All respondents, N=6027, single answer, scale from 1 to 5, mean)



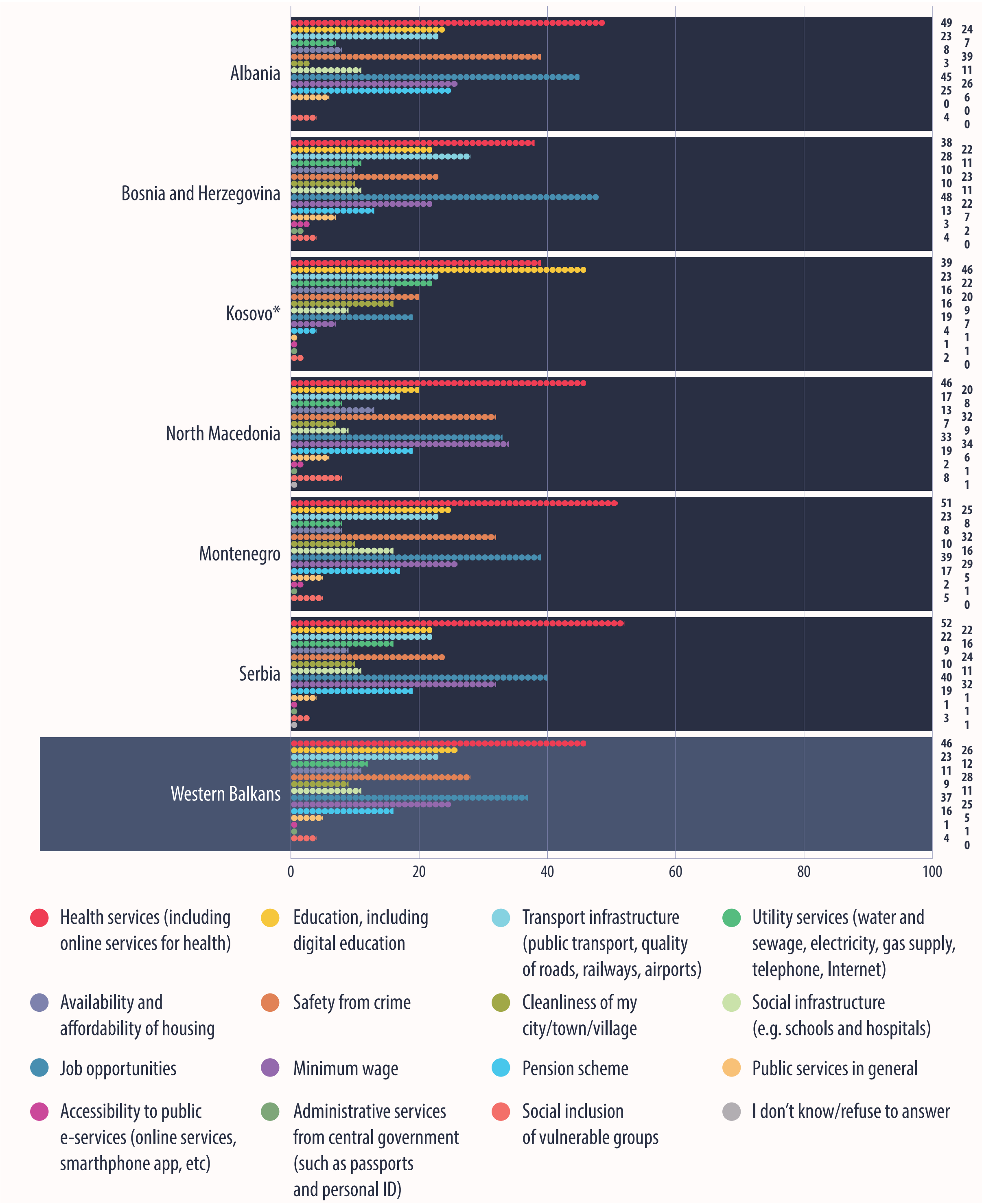
The level of satisfaction of respondents for each of the component is presented by economy in Figure 16. Except for Kosovo*, the level of prices is most dissatisfying component in their place of living for all respondents from the region, ranging from 1.4 points in Albania to 1.8 points in Bosnia and Herzegovina and Serbia. While respondents in all economies seem to score each component differently, there is an unusual uniformity across components (with all being at approximately at 3 points) in Kosovo*. Administrative services from central government in Albania reach the highest score of the figure (3.6 points), which might be explained by the recent years' developments of the e-government platform services (e-Albania) in this economy, digitalising more than 1200 public services. However, compared to 2022, the score has decreased by 0.3 points, which might be a consequence of the cyberattacks on the system that took place in 2022, shutting down services for a few weeks. In Montenegro and Serbia, social life appears to be the most satisfactory element amongst the respondents, with a score of 3.4 for each.

Figure 16: Could you please tell me how satisfied are you with each of the following in your place of living? (Results by economies)
(All respondents, N=6027, single answer, scale from 1 to 5, mean)



Demands for their own government are concentrated in one area across the region, which is health services (Figure 17). At the regional level, 46% of respondents believe that investing in this sector should be a top priority for decision-makers, followed by tackling unemployment and creating job opportunities (37%). While health services seem to be a bigger concern in Serbia and Montenegro (52% and 51%, respectively), for respondents from Bosnia and Herzegovina the biggest priority is actually job opportunities (48%), followed by Albania with 45% choosing this area. It is important to notice that the third most selected concern at regional level (and in some of the economies) is safety from crime (28%). This is considered a priority especially in Albania, where 39% of respondents have expressed their worry and the need for the government to address it.

Figure 17: Which three (3) of the following areas should be the priority of the Government for the next 12 months?
(All respondents, N=6027, maximum 3 answers, share of total, %)



Following up on the respondents' concerns regarding safety from crime, Figure 18 explores further the relation with perception of safety and illegal possession and misuse of weapons. Although more than half of respondents (56%) from the region do not consider this a threat, the remaining 45%, which do, are still a point for concern. These perceptions are almost the same as in 2022, showing the persistence of the problem and no major changes in policies. Respondents from Bosnia and Herzegovina are the most concerned in relation to weapons, with a total of 58% of respondents considering them a threat. The relatively safest economy in this regard seems to be Serbia, where almost 70% of respondents do not consider weapons a threat for their community. However, in view of the two tragic events of mass shootings taking place in Serbia in early May 2023, most probably these results would be different if the survey had been implemented later and capturing the aftermath sentiments of citizens. These events prompted declarations about policy changes, with Serbian president pledging to urgently "disarm" the population of Serbia.[2]

Figure 18: How threatened do you feel by illegal possession and misuse of weapons in your neighbourhood (as in crime, domestic violence, celebratory shooting, etc.)

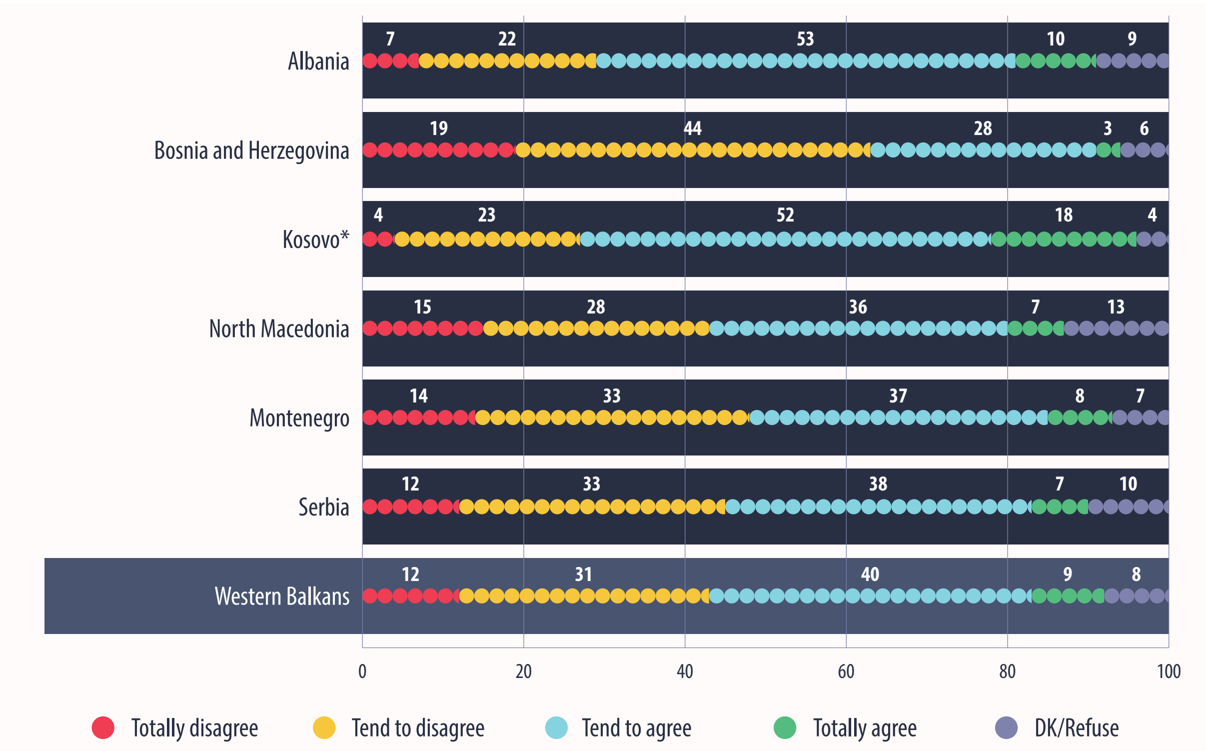
2 Boffey D. and Russell, G. (2023) "Serbia to be 'disarmed' after second mass shooting in days, president says", The Guardian, 5 May. Available at: https://www.theguardian.com/world/2023/may/05/serbia-eight-killed-in-second-mass-shooting-in-days-with-attacker-on-the-run

ATTITUDES ON REGIONAL COOPERATION AND EU INTEGRATION

The WB has been working on and pursuing both EU integration and regional cooperation for many years now. Despite existing challenges and shortcomings, both agendas have recorded advancement. Montenegro and Serbia are dealing with the EU accession negotiations, Albania and North Macedonia started this process in 2022, Bosnia and Herzegovina was granted the candidate status, and Kosovo* is expected to be introduced to the visa-free regime with the EU, joining the other five economies. Regional cooperation has also experienced considerable achievements, with several agreements being implemented and important components being pushed forward.

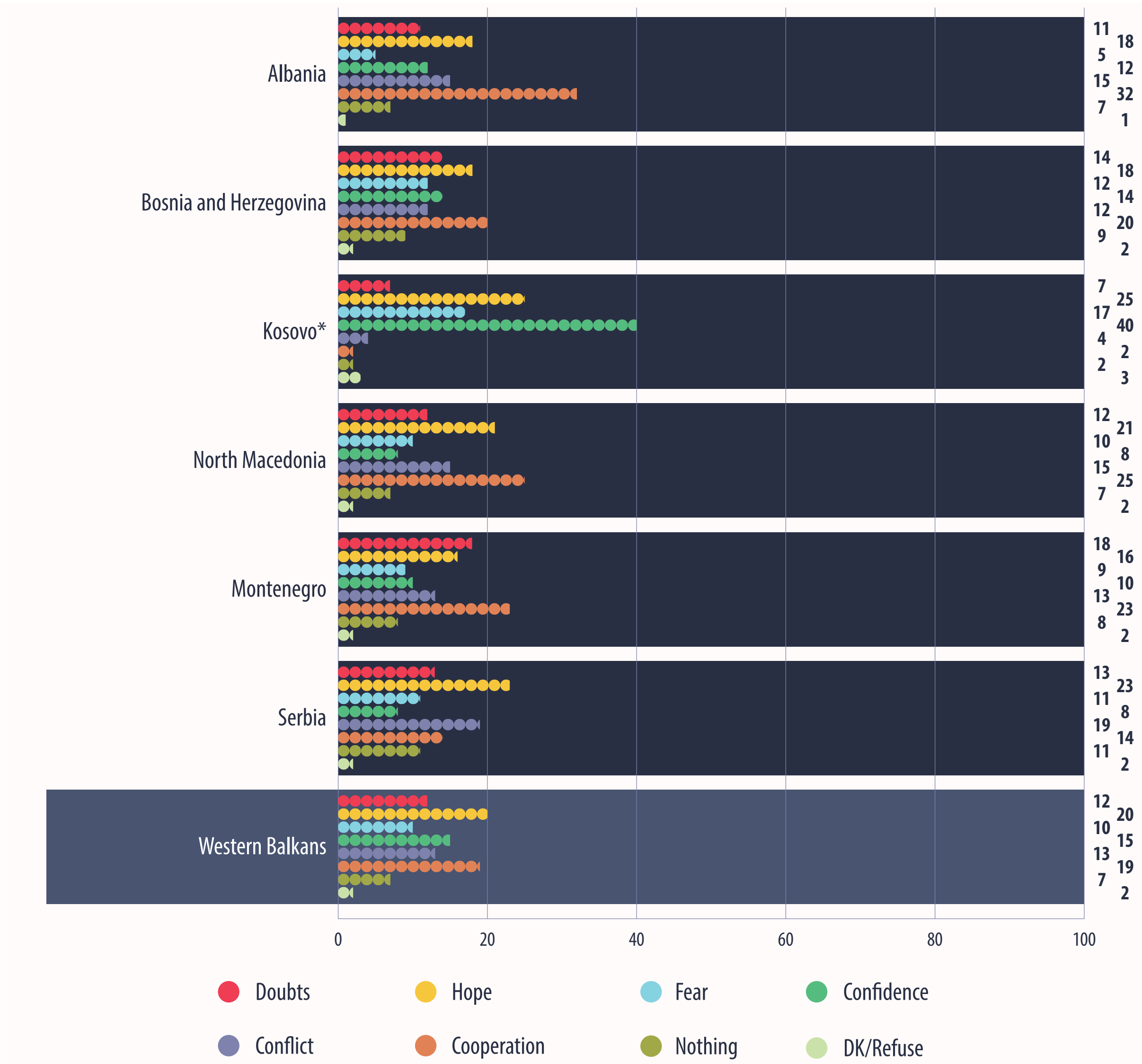
However, it is important to collect and analyse perceptions of respondents from the region regarding these developments, and this section aims to do so. Figure 19 tries to capture opinions of respondents regarding changes perceived in the relations between economies in the WB. Almost half of the respondents at the regional level (49%) agree that relations in the region have improved in the last 12 months. This share is almost the same (1 point less) when compared to 2022. Kosovo* and Albania appear to be sharing this perception most, with a total of 70% and 63%, respectively, stating that relations between economies are better than last year. In the case of Albania, the percentage of those confirming this position has experienced a significant increase of 9 points compared to 2022, while Kosovo* is 2 points lower. Respondents from Bosnia and Herzegovina, on the other hand, do not believe that the relations have improved in the region, by a large majority of 63%, reaching a level of 5 points more than 2022.

Figure 19: Do you agree that the relations in the Western Balkans are better than 12 months ago?
(All respondents, N=6027, single answer, scale from 1 to 4, share of total, %)



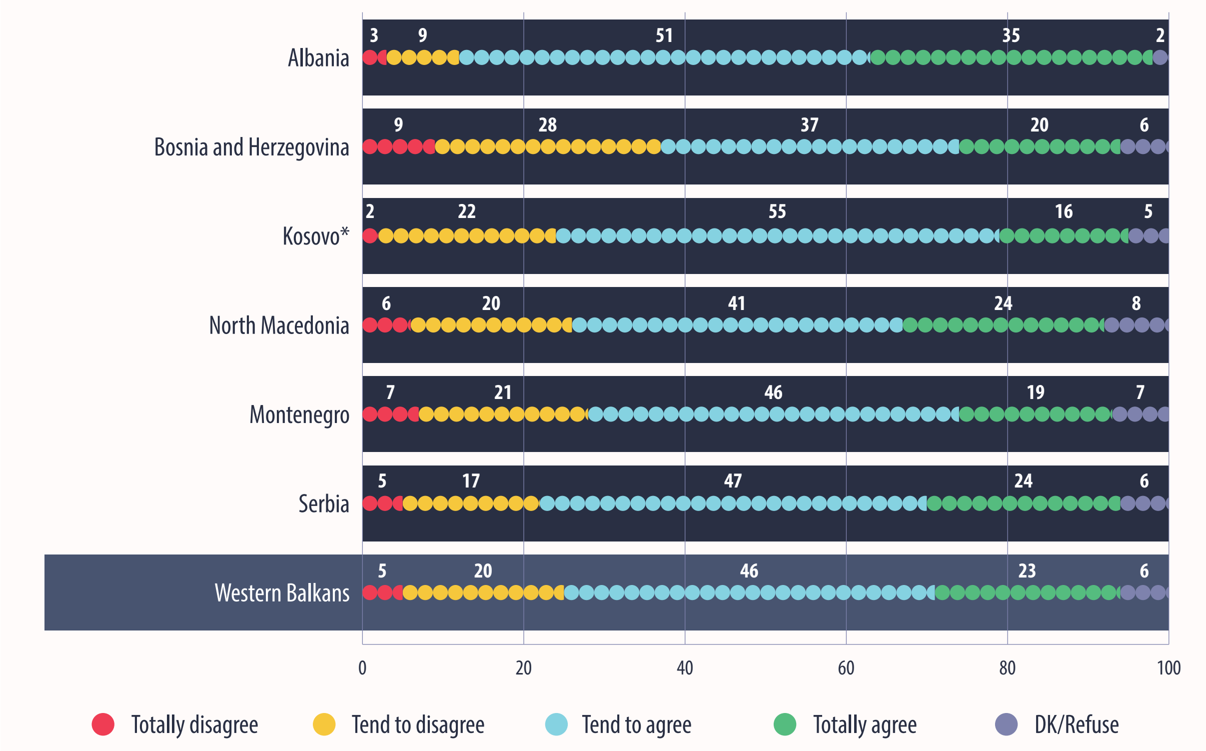
The perceptions registered and displayed in Figure 19 are confirmed in the next figure as well. When asked about the feeling they associate with WB, the respondents were quite divided. One fifth of them attach the feeling of hope to their thoughts about the region, and almost another one-fifth (19%) think of cooperation. However, a total of 35% of them think of the region as a source of doubts, fear and conflict. Doubts reach the highest peak in Montenegro (18%), while fear is highest in Kosovo* at 17%. Respondents from Serbia have listed the conflict association at 19%, while respondents from Albania and North Macedonia are second at 15%. In terms of more positive thoughts regarding the region, Kosovo* responses have registered a high share of 40% of those who associate the region with a feeling of confidence, and hope is also at its highest peak (25%) in this economy. Respondents from Albania seem to favour cooperation related to the region, with 32% choosing this option to describe the region.

Figure 20: When you think of the Western Balkans, what feeling first comes to mind?
(All respondents, N=6027, single answer, share of total, %)



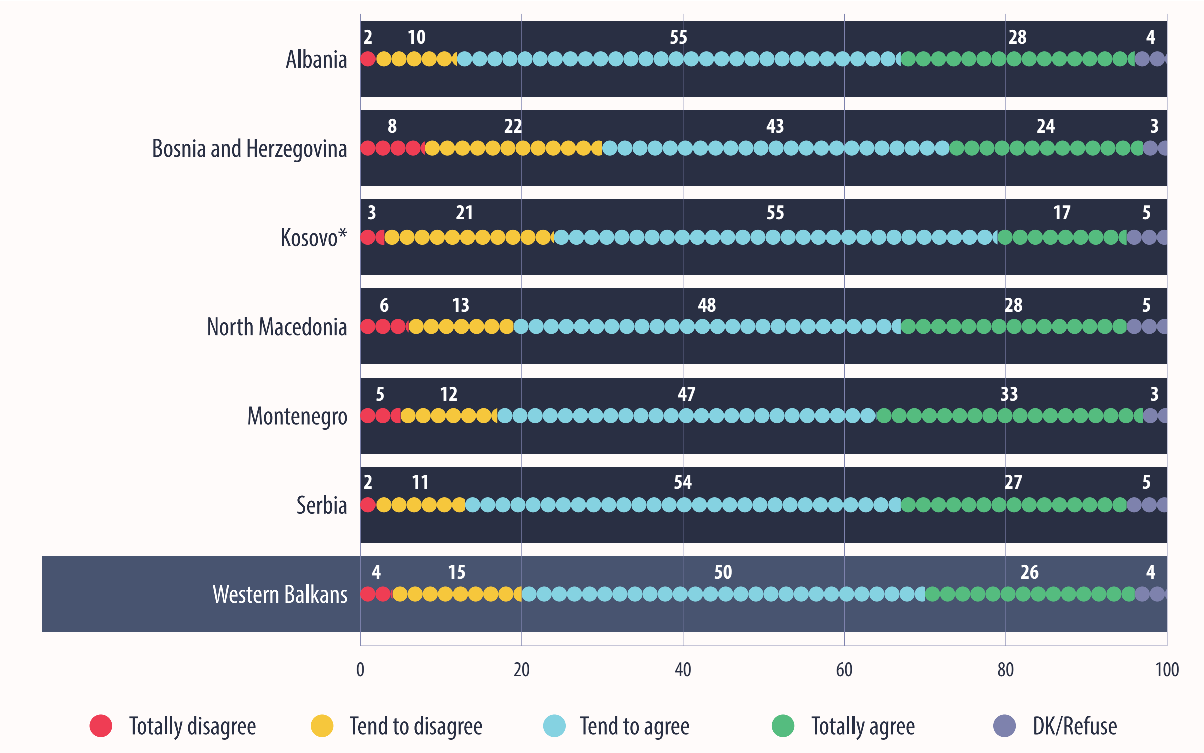
There is a generally positive attitude regarding commonalities between respondents from different economies of the region. Figure 21 shows that 69% of respondents agree that what brings them together is more important that what divides them. Results on this question for the regional level are the same as in 2022 for the affirmative answers; however, those who disagree with the statement (25%) have increased by 3 points. At the economy level, respondents have stated similar positions across the region, except for Albania and Bosnia Herzegovina, which differ the most on this question. While respondents from Albania tend to agree or strongly agree by a large majority (86%) that what brings people in the region together is more important, 37% of respondents from Bosnia and Herzegovina disagree (with a considerable increase of 12 points from 2022). However, most respondents (57%) from this economy still agree with the statement.

Figure 21: To what extent do you agree or disagree with the following statement: What brings Western Balkans citizens together is more important than what separates them?
(All respondents, N=6027, single answer, scale from 1 to 4, share of total, %)



Confidence on regional cooperation as an instrument for positive contribution to overall situation in the economies is quite high across the WB. As Figure 22 shows, half of respondents from the region tends to agree with this statement. More than a quarter of respondents strongly agrees with it, for a total of 76% of positive feedback (same as in 2022), against 19% who are not keen on considering regional integration as useful for improving the current situation (1 point higher than in 2022). At the single economy level, again the only case with some noticeable differences from the regional average is represented by respondents from Bosnia and Herzegovina. About 30% of respondents from Bosnia and Herzegovina disregard regional cooperation as a resourceful instrument. Respondents from Albania rely more than other respondents from the WB on regional integration as a positive contributor, with a total of 83% of affirmative responses, followed by Serbia with 81%.

Figure 22: Do you agree that regional cooperation can contribute to political, economic or security situation of your economy?
(All respondents, N=6027, single answer, scale from 1 to 4, share of total, %)



Some considerable changes are observed regarding attitudes of WB respondents towards the EU membership compared to the previous year (Figure 23). While at regional level results are almost the same as in 2022, some of the economies have experienced a few shifts. Overall, 59% of respondents from the region see EU membership as a good and positive step for their economy (1 point less than last year). The share of sceptics who claim that the EU accession would be bad for their economy is the same as in 2022, staying at 11%. The group characterised by a more neutral approach, considering the EU membership neither good nor bad, has increased by three points, reaching 28%.

At the economy level, respondents from Albania continue to be the most enthusiastic about EU membership, with an overwhelming majority of 92% in support, and only 1% against. Each year, respondents from Albania have claimed the highest share of supporters in the reports, while this year they registered a further increase of 3 points compared to 2022. The opening of accession negotiations on 19 July 2022 might have fuelled further the pro-European attitudes in the economy.

However, respondents from North Macedonia, which opened the accession negotiations process in the region in 2022, have gone in a slightly different direction in terms of support for EU membership. Only half of respondents from North Macedonia consider membership as a good thing, dropping by a considerable share of 6 points from the previous year. While those who believe that membership would be a bad thing have increased by only 1 point (reaching 13%), the share of those assuming a neutral position has increased by 3 points (at 34%). These changes of support have made North Macedonia the second less supporting economy in the region for EU membership (with only 50% considering it a good thing), replacing Bosnia and Herzegovina.

Answers of respondents from Kosovo* also present noticeable developments. Support for EU membership has dropped by 7 points, reaching 66%. In addition, the share of respondents who are neutral to an eventual membership has increased by 8 points (reaching 28%). Support for EU membership has not been consistent throughout the series of editions of the Balkan Barometer; therefore, this year's report is no exception. As a reminder, while in 2022 support was at 73%, in 2021 it was as low as 51%, while in 2020 it had reached a higher peak of 75%. While other economies have registered some easily identifiable patterns with little annual changes, answers of respondents from Kosovo* (and Montenegro in the past)[3] have been less stable. Minor changes are recorded in other economies. Respondents from Serbia continue to express the lowest levels of support for EU membership in the region (34%), dropping by 4 points from 2022 and maintaining a decreasing trend. While the share of those against membership has increasing only by 1 point (up to 23%), the percentage of neutrality positions has expanded by 3 points (up to 39%), also constituting the relative majority amongst the categories of answers.

Figure 23: Do you think that EU membership of your economy would be good, neither good nor bad or bad?
(All respondents, N=6027, single answer, share of total, %)

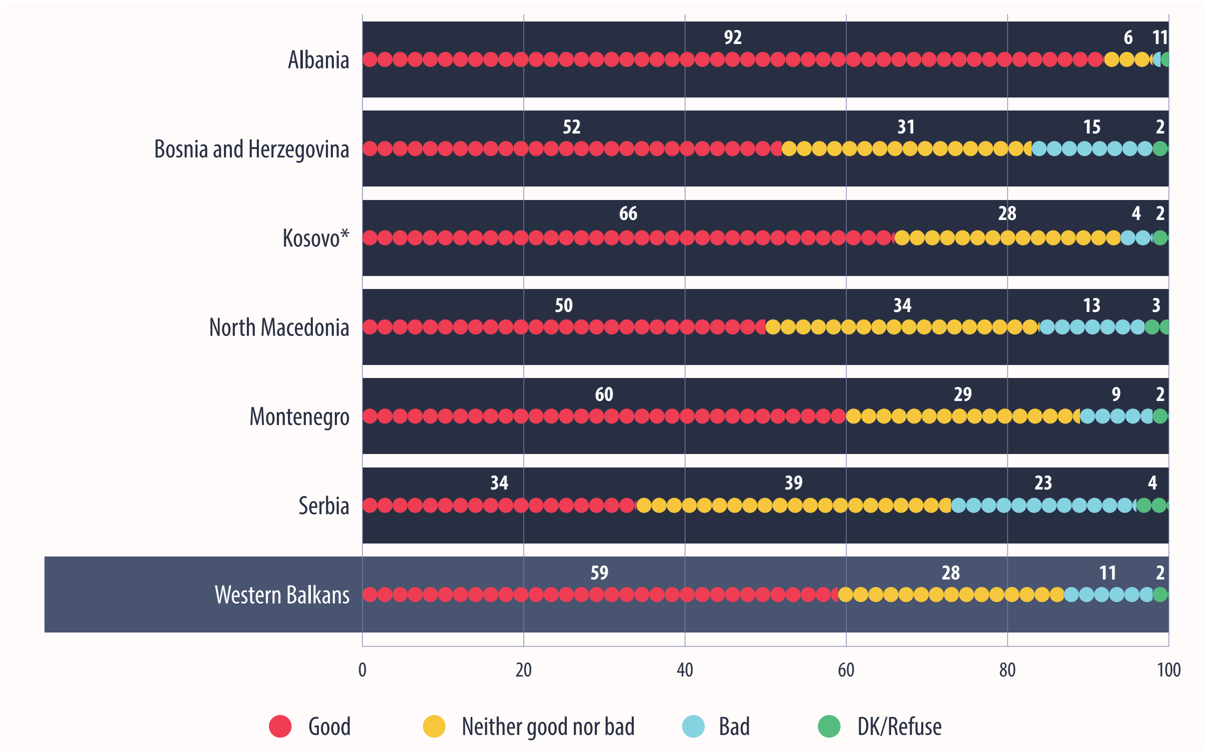


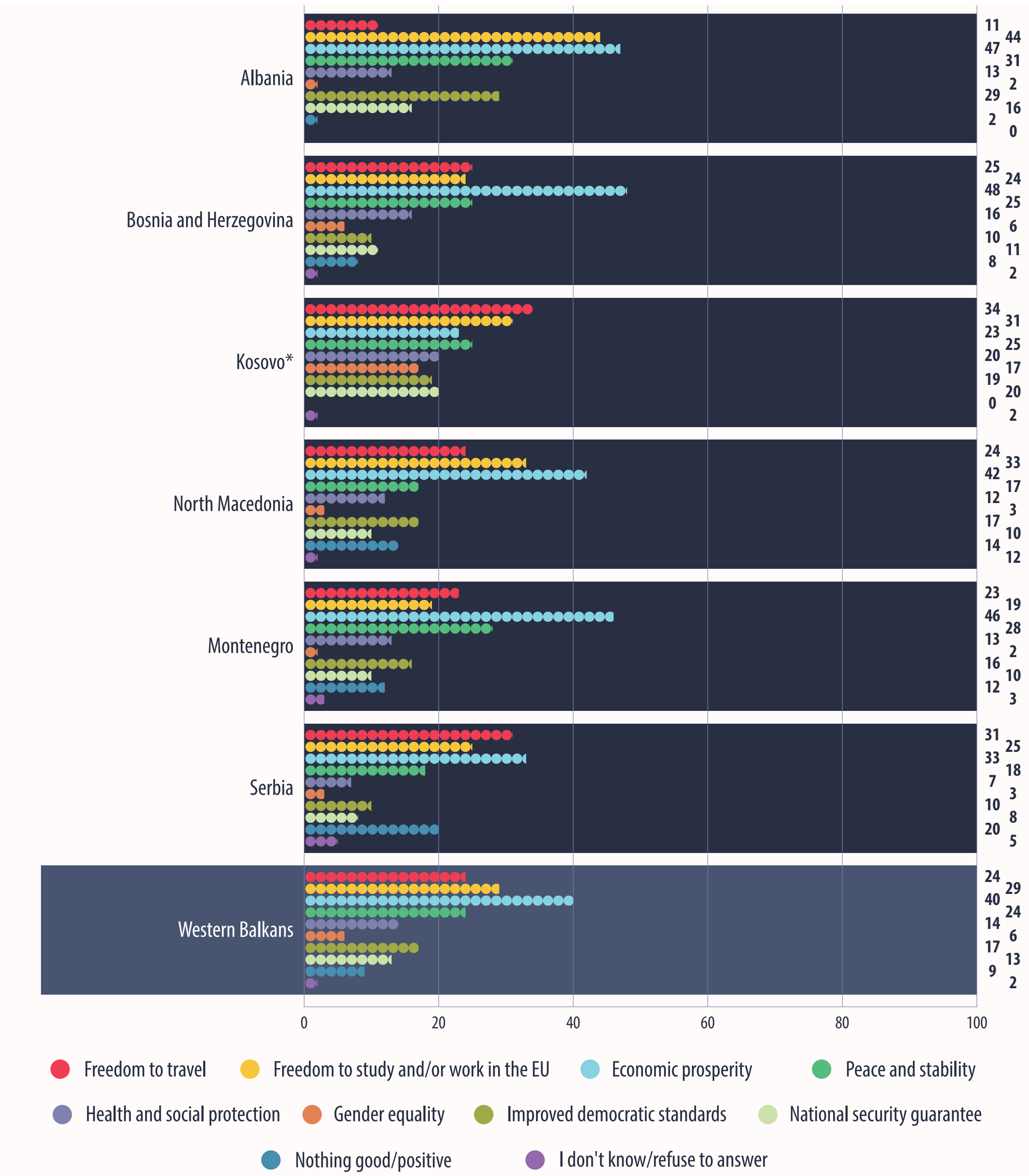
Figure 24 displays what EU membership would mean for respondents at a personal level. Economic gains and prosperity are ranked as the main expectation of respondents from the WB, with a share of 40% (increasing by 3 points from 2022). Freedom to study and/or work in the EU is the second most cited benefit (29%), dropping by 3 points compared to the previous year. Freedom to travel, and peace and stability are both at the third place (with 24% each), presenting minor changes from last year.

At the economy level, economic prosperity is the most expected benefit in each context (apart from Kosovo*), reaching a peak of 48% of respondents from Bosnia and Herzegovina. In Kosovo*, freedom of travel is mentioned by most of respondents (34%), which is explained by the fact that Kosovo* is the only economy of the region which has not been included yet in the visa free regime by the EU. The freedom of movement for study and/or work is mostly selected by respondents from Albania

3 Support for EU membership in Montenegro, as recorded in the Balkan Barometer editions, went from 54% in 2020 up to 91% in 2021, and dropped again to 57% in 2022.

(44%) and North Macedonia (33%), which are also the two economies with the highest number of persons from the region having requested asylum in the EU in 2022.

Figure 24: What would EU membership mean to you personally?
(All respondents, N=6027, maximum 2 (two) answers, share of total, %)

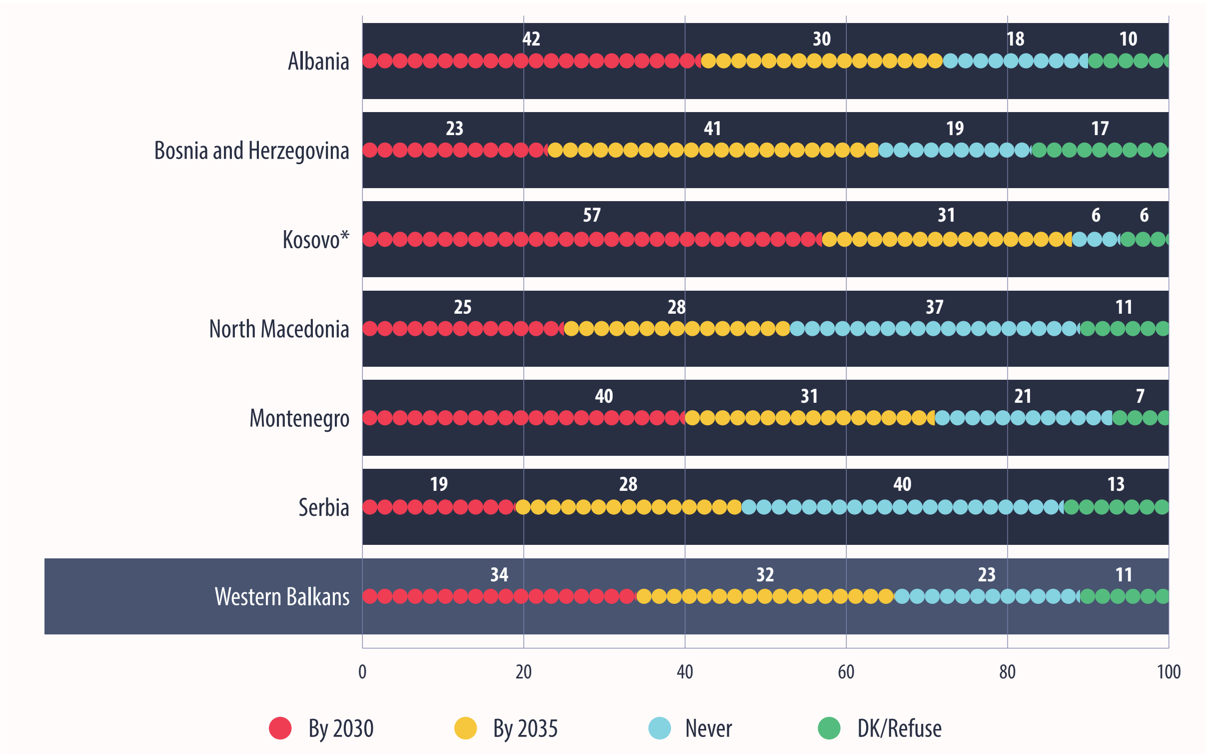


There is clear fragmentation of answers in the region when it comes to a potential date for achieving EU membership (Figure 25). More than a third of respondents (34%) believe that their economy will become a member by 2030, while almost another third (32%) chooses 2035 as the deadline for membership. A substantial 23%, however, thinks that their economy will never join the EU. In 2022 this pessimistic view was shared by more respondents (28%).

Respondents from Kosovo* and Serbia present the two extremes of responses, with the former being the most optimistic about joining the EU before 2030 (57%), and the latter with only 19% sharing the same opinion. Around 40% of respondents from Serbia claim that their economy will never join the EU (against the lowest 6% of Kosovo*), which is the highest share in the region choosing this response. Bosnia and Herzegovina and North Macedonia follow Serbia on the sceptic route, with only 23% and 25%, respectively, thinking that their economy will be able to join before 2030. However, the opinion about never being able to join is most common in North Macedonia (37%), followed by Bosnia and Herzegovina (19%) where this share decreased by 16 points compared to 2022.

Although respondents from Albania are the strongest supporters of EU membership, almost one fifth of them (18%) believes that their economy will never be able to join the Union (4 points less than in 2022).

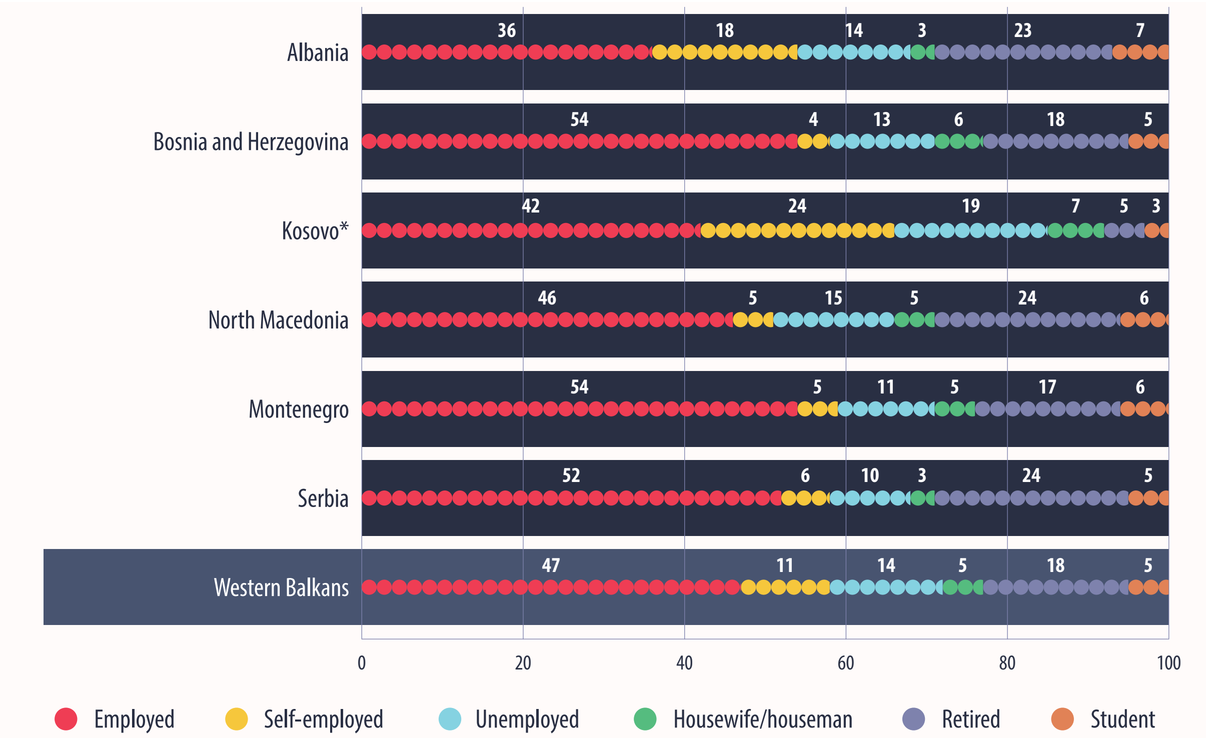
Figure 25: When do you expect the accession of your economy to the EU to happen?
(All respondents, N=6027, single answer, share of total, %)



EMPLOYMENT AND SOCIAL INCLUSION

As already shown in Figures 16 and 17, employment and job opportunities are among the top priorities for respondents from the WB. Especially in this difficult economic situation and challenges, working possibilities and social inclusion assume even more relevance. In this section, the report analyses respondents' answers regarding employment and social inclusion in terms of experiences, expectations, preferences and problems encountered. Almost half of the respondents (47%) who participated in the survey are employed. The second biggest category of survey respondents is composed of retired citizens (18%), followed by unemployed (14%) and self-employed (11%).

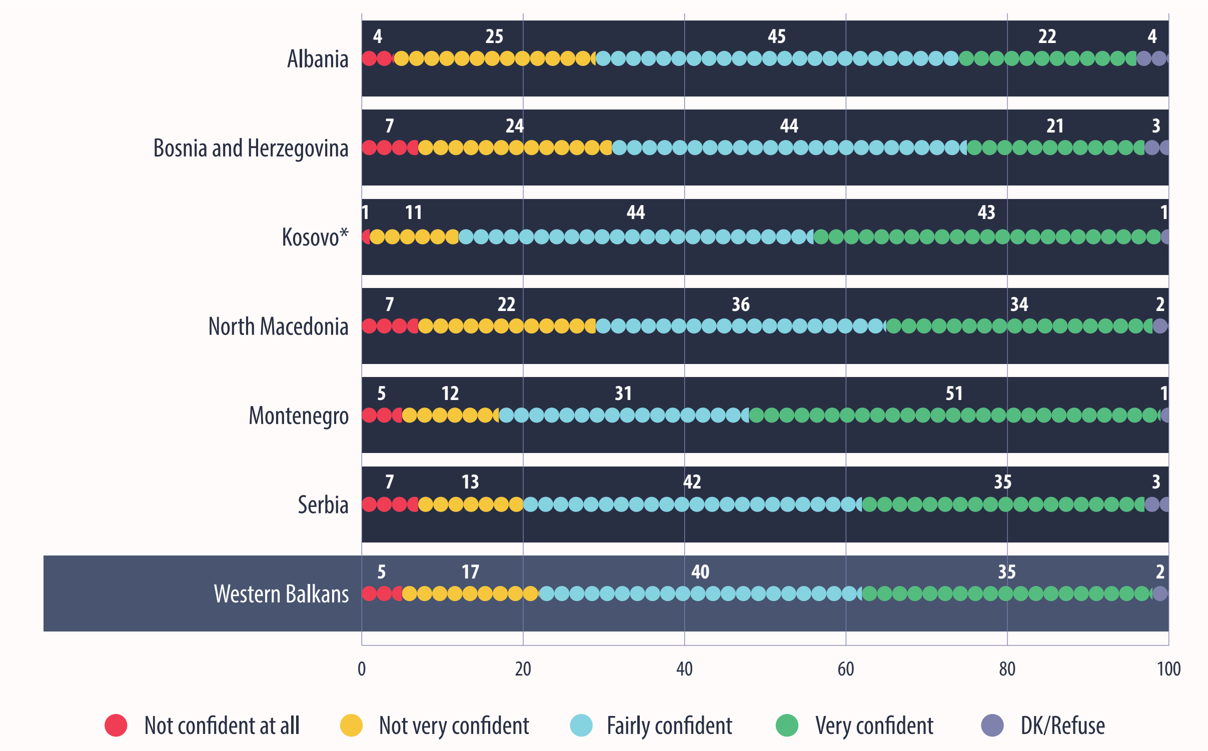
Figure 26: What is your current working status?
(All respondents, N=6027, single answer, share of total, %)



Employed and self-employed respondents were asked about the expectations and certainties of being able to keep their current work activity in the coming 12 months (Figure 27). At the regional level, 35% are very confident about maintaining their current employment in the next year, increasing by 9 points compared to 2022. Another 40% is fairly confident, 2 points less than the previous year. Only 5% of respondents have no confidence at all, while 17% are not very confident, both groups smaller than in 2022.

However, this small boost of confidence compared to the previous year is spread differently between the economies. Kosovo* and Montenegro respondents were the most confident with overall scores of 87% (10 points of increase) and 82% (8 points of increase), respectively. On the other hand, the less confident for keeping their job are to be found in Bosnia and Herzegovina, Albania and North Macedonia, with a total of 31%, and 29% for the other two economies, respectively, demonstrating their uncertainty for the next 12 months. While the share is almost the same in Bosnia and Herzegovina as in 2022 (30% last year, and 31% in this edition), in North Macedonia this group has decreased by 8 points.

Figure 27: How confident are you in keeping your job in the coming 12 months?
(Employed or self-employed, N=3508, scale from 1 to 4, single answer, share of total, %)



Respondents were asked about the specific problems they encountered in the past 12 months due to challenges with the economic and financial situation (Figure 28). Based on an obvious setting of priorities that each person and household has adopted throughout a difficult economic situation and inflation, the most common sacrifice among respondents from the WB has been to skip holidays (45%). This is considered as the first ranked problem faced by respondents, same position as in 2022 (but increased by 2 points). In the second place, with 35% of share, is the inability to undertake repairs or renovation of their house. Although not at the top list of most shared problems, it is important to notice that almost one fifth of respondents claims to have experienced (at least once) the difficulty of paying rent/bills (19%), and food and clothes (17%). These groups present similar shares as in 2022.

Figure 28: Did you face any of the following problems (even at least once) during the past 12 months?
(Results for the Western Balkans region)
(All respondents, N=6027, single answer, share of total, %)

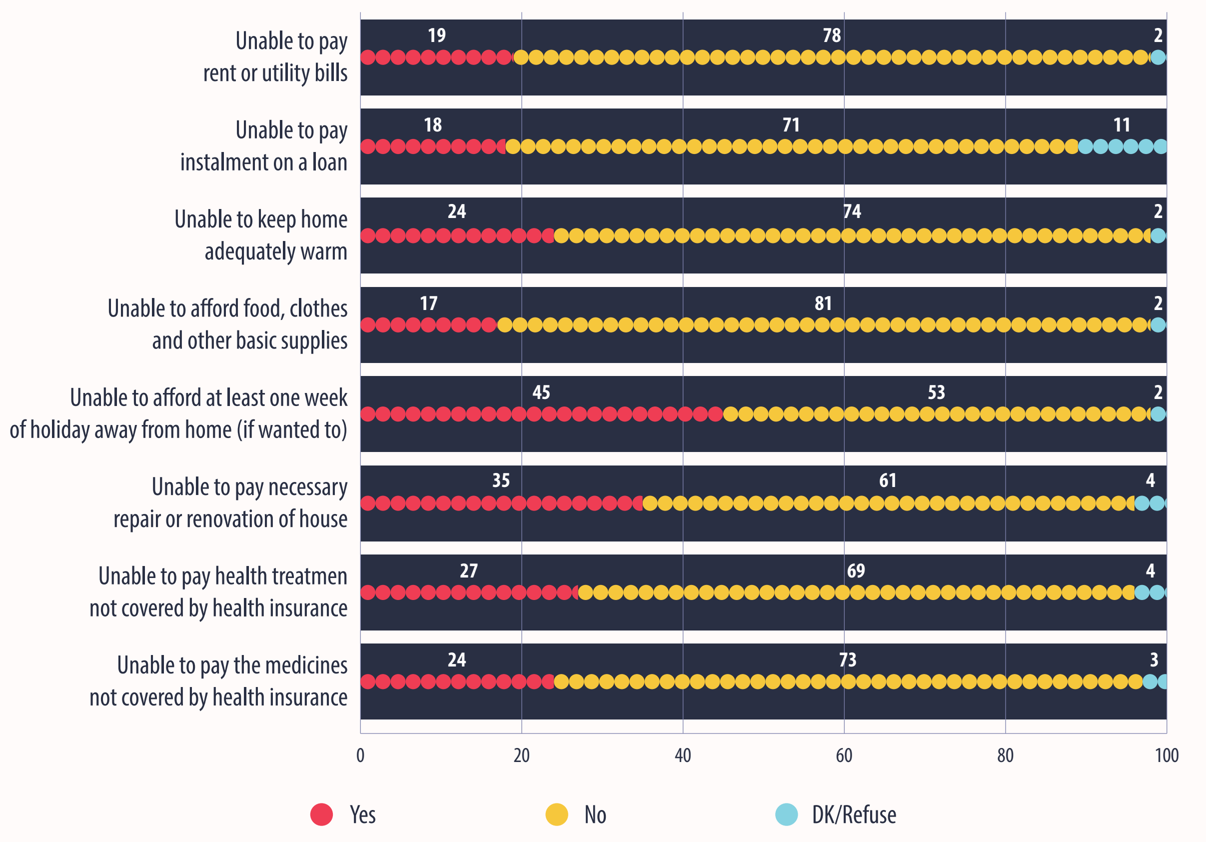
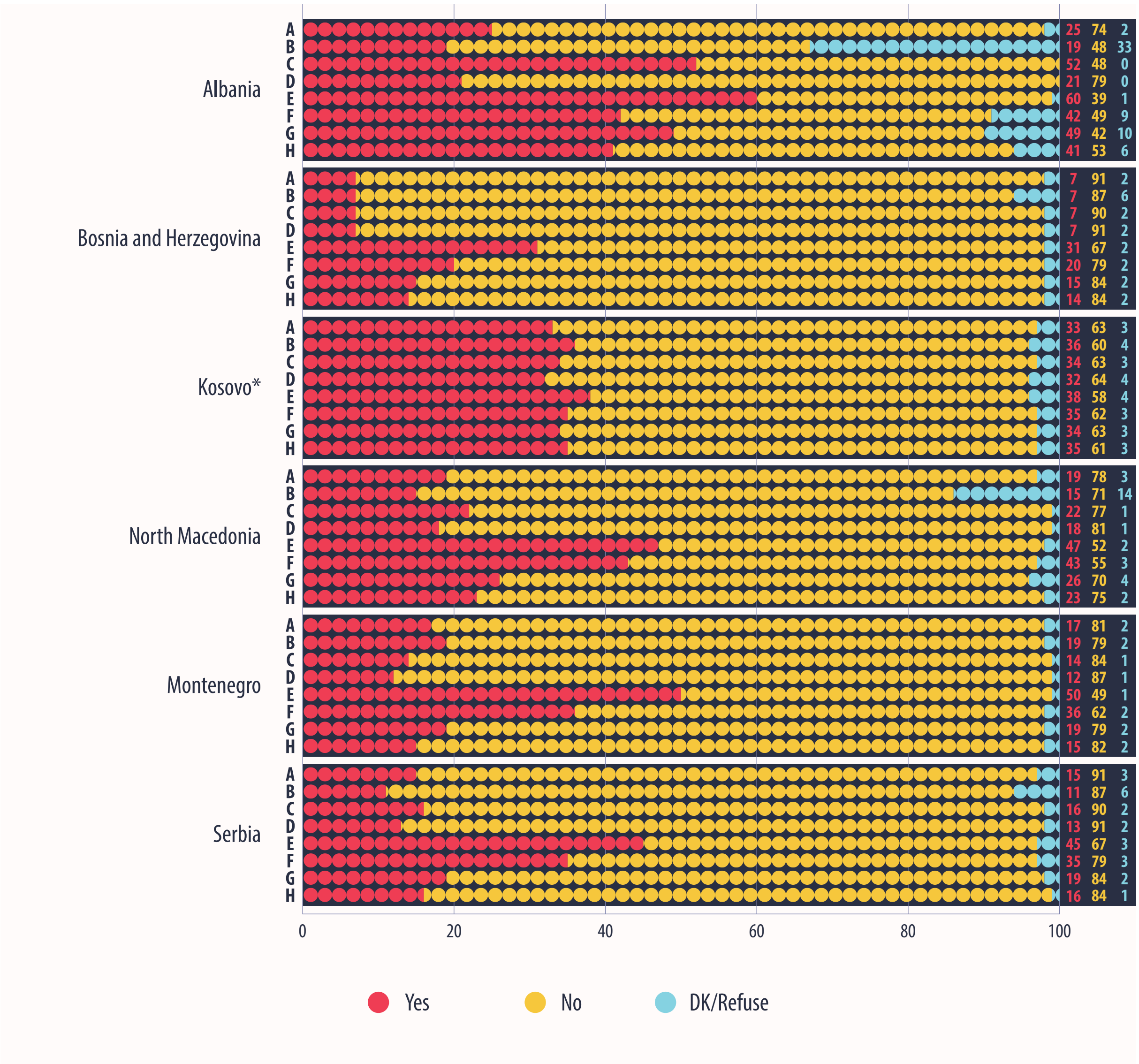


Figure 28 shows that economies of the region present considerable differences amongst them in terms of problems households faced in the past 12 months. Beyond being unable to pay for holidays, which is common to all economies, 52% of respondents from Albania have encountered challenges of paying the heat for the house (8 points higher compared to 2022). This is the highest share in the region for this problem, followed only by Kosovo* with 34% (13 points higher than the previous year). Figure 29 shows that respondents from Bosnia and Herzegovina seem to have faced less problems compared to other economies, since only 7% of respondents claim to have had troubles in meeting basic needs (rent, bills, food, heat, clothes, etc.)

Figure 29: Did your household face any of the following problems (even at least once) during the past 12 months? (Results by economies)

A) Unable to pay rent or utility bills; **B)** Unable to pay instalment on a loan; **C)** Unable to keep home adequately warm; **D)** Unable to afford food, clothes and other basic supplies; **E)** Unable to afford at least one week of holiday away from home (if wanted to); **F)** Unable to pay necessary repair or renovation of house; **G)** Unable to pay health treatment not covered by health insurance; **H)** Unable to pay the medicines not covered by health insurance

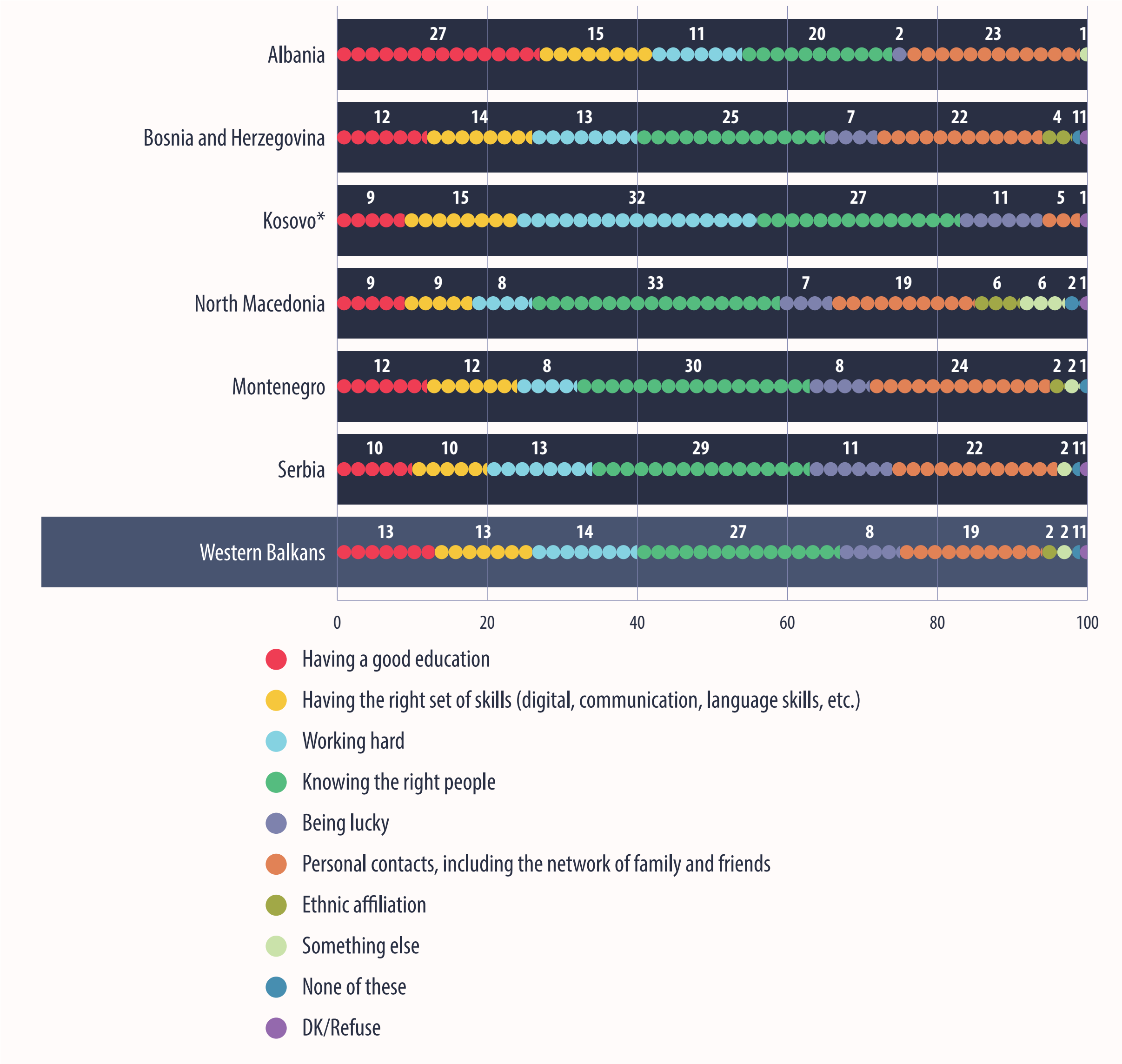
(All respondents, N=6027, single answer, share of total, %)



'Knowing the right people' remains the most important factor for getting ahead in life and finding a job, according to 27% of respondents from the region (the same as in 2022). If we add to this group the second most selected factor, which is personal contacts, network, and family (19%), it means that more than half of the respondents at the regional level do not necessarily consider meritocracy as a valid factor. Only a quarter of respondents believe that good education and appropriate set of skills would guarantee a job (13%, respectively).

Figure 30 shows also how these opinions are shared across economies. Education is mostly appreciated in Albania (27%). In Kosovo*, respondents believe that working hard is actually the most important factor (32%). Knowing the right people is considered the main element in the other four economies, ranging from 25% in Bosnia and Herzegovina up to 33% in North Macedonia.

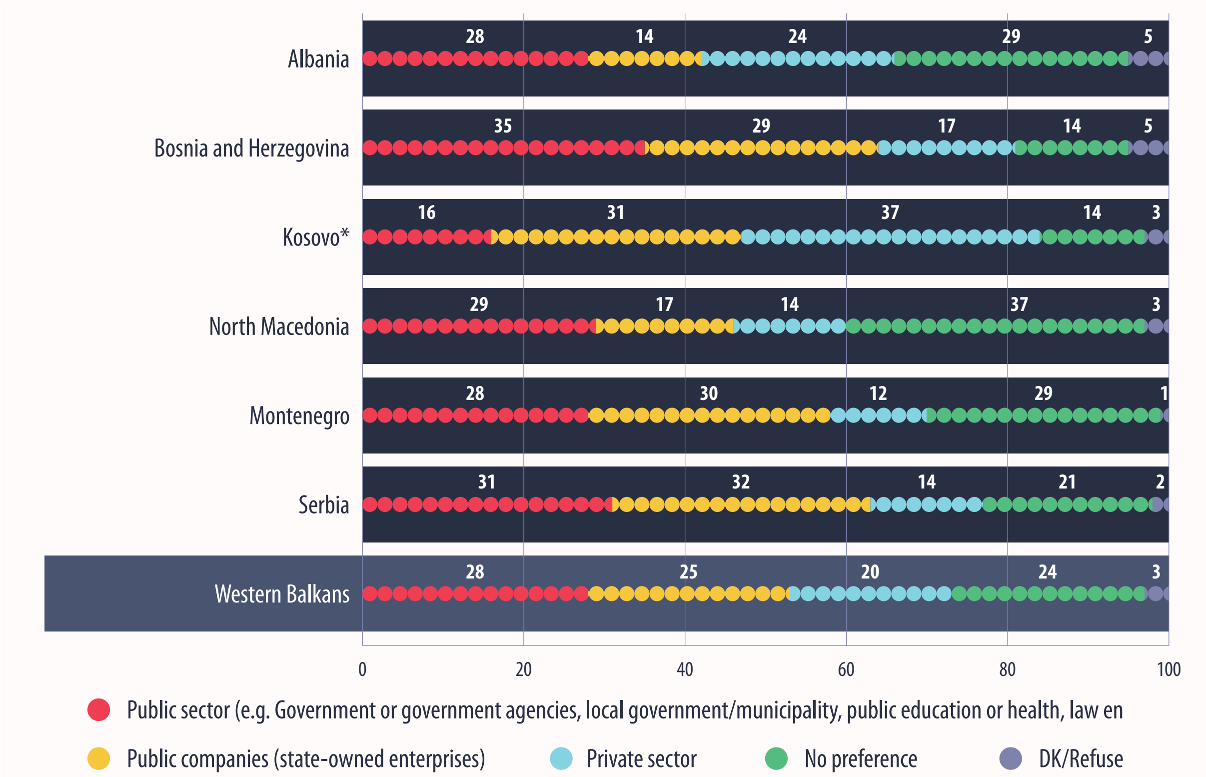
Figure 30: What do you think is the most important for getting ahead in life and finding a job in your economy?
(All respondents, N=6027, single answer, share of total, %)



Preferences of respondents from the region regarding employment in public or private sector are presented in Figure 31. Respondents are quite divided in their answers, though more than half of them would like to work in the public sector (public administration) or public companies (28% and 25%, respectively). While the preference for the public sector has remained the same as in 2022, public companies have increased their appeal by 6 points, compared to last year. Choices for the private sector have reached 20% (3 points less than 2022), while those who have no preference are at 24%.

When asked about preferences regarding the public and private sector employment, public sector is mostly preferred in Bosnia and Herzegovina with 35% (2 points more than last year), while public companies are a preferred choice in Serbia (32%), followed by Kosovo* (31%) and Montenegro (30%). Kosovo*, on the other hand, is the only economy where a relative majority of respondents prefers the private sector (37%), with a considerable increase of 20 points compared to last year. Only 16% of Kosovo* respondents would like to work in the public sector (administration). The largest share of respondents from North Macedonia (37%) has no preference between the proposed sectors.

Figure 31: If you could choose, would you prefer to work in the public (public administration and public companies) or private sector?
(All respondents, N=6027, single answer, share of total, %)



Safety and certainty of the job is the primary reason for 59% of respondents from the region preferring employment in the public sector (4 points more than in 2022). Better working conditions (41%) and better salary (35%) follow the ranking of main reasons (with a decrease of 4 and 6 points, respectively). The average public administration salary in the WB is higher than the average salary in the private sector of the respective economies,[4] hence this factor also influences choices and preferences.

Job certainty is the main factor influencing respondents in all economies (except Kosovo*), ranging from 57% in Albania up to 70% in Serbia. The main reason given in Kosovo* is having a better pension after retirement, with 33%, and an increase of 17 points from 2022. Better advancement opportunities are the least selected factor for making employment in the public sector as a first choice at the regional level.

4 Vladisavljevic, M., Narazani, E., and Golubovic, V. (2017) *"Public-private wage differences in the Western Balkan countries".* Available at: https://www.researchgate.net/figure/Ratio-between-the-average-wage-in-the-public-administration-and-average-wage-Western_fig1_319402156

Figure 32: If you prefer to work in public sector, what are the main reasons for that?
(Those who prefer working in public sector, N=3204, maximum 3 answers, %)

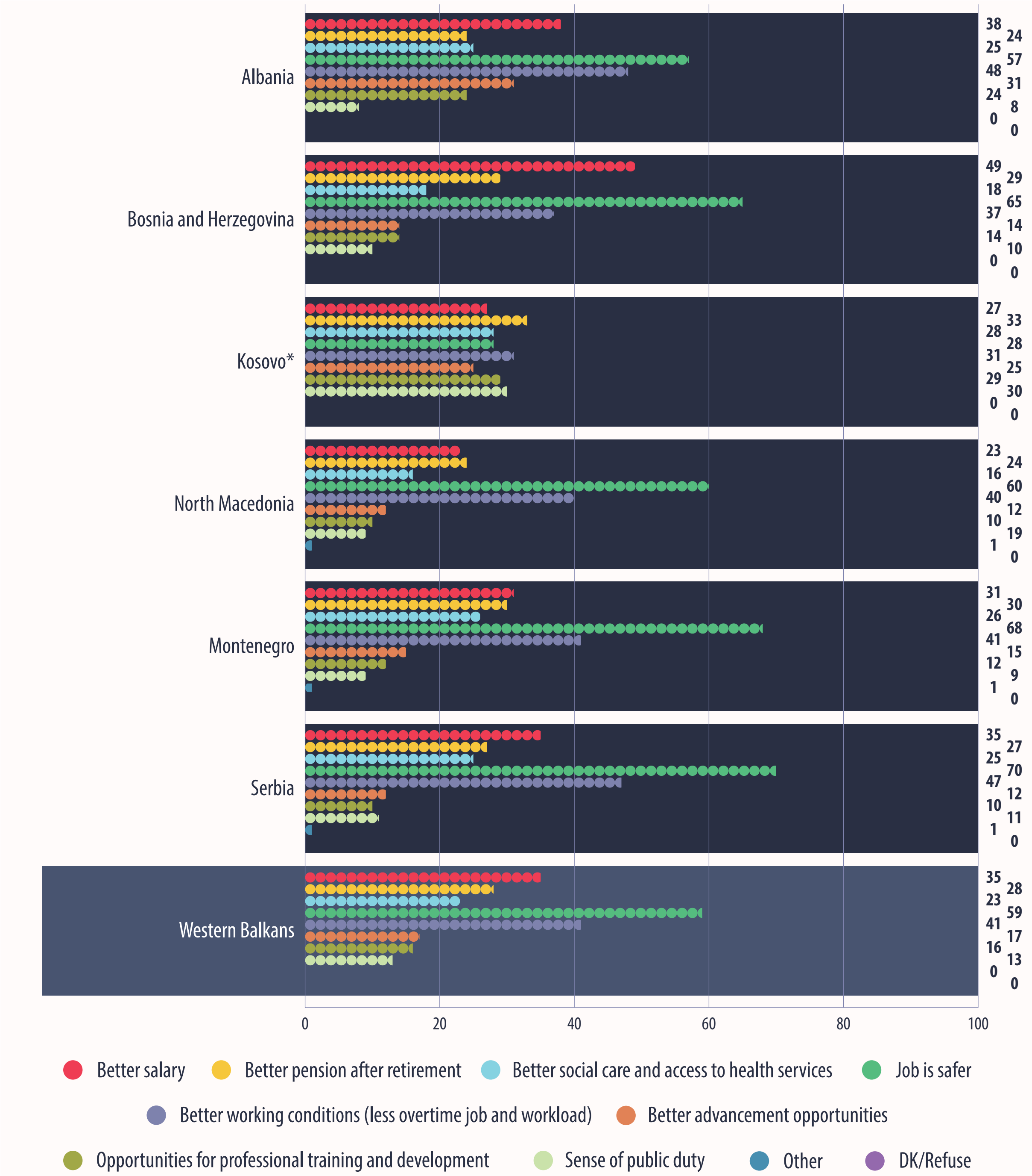
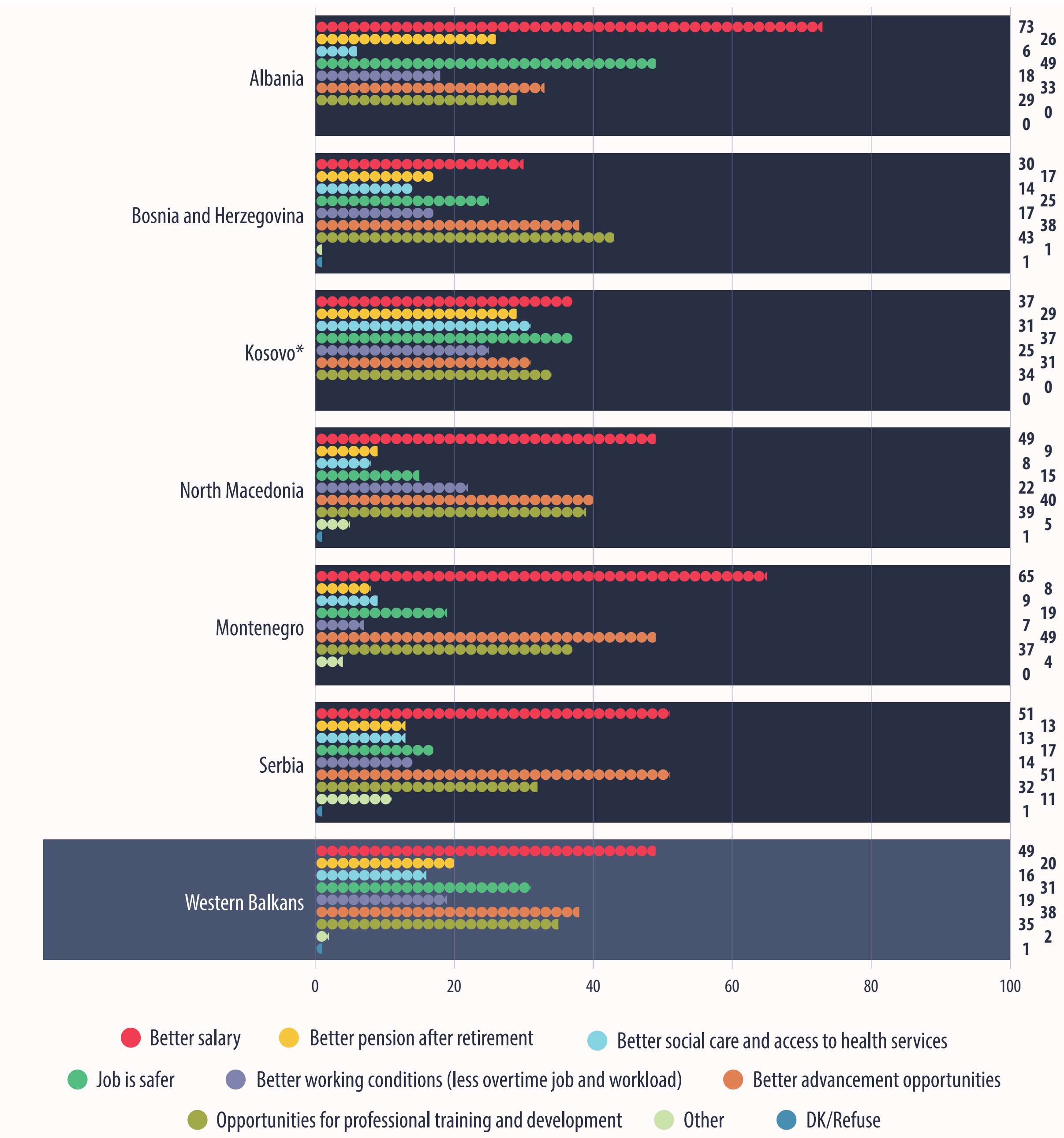


Figure 33 shows the main reasons that respondents from the region have given for preferring the private sector for employment. The competitive pressure that the private sector exercises through increased salary and promotion incentives are at the forefront of factors influencing the choice of the private sector. Among those who choose the private sector, almost half of respondents (49%) from the region do so due to the perception of better salaries. The share of respondents who identify this as the main reason for choosing the private sector has dropped by 5 points relative to the previous year. Better advancement opportunities (38%) and opportunities for training and development (35%) follow, with the latter jumping up by 9 points compared to 2022. The perception of the private sector opportunities as more dynamic and connected to personal and professional growth is also confirmed across each economy.

While higher salaries are chosen as the most important factor for respondents from Albania (73%), Montenegro (65%), Serbia (51%), North Macedonia (49%) and Kosovo* (37%), in Bosnia and Herzegovina it is ranked only third. Training opportunities and advancement are selected as first and second reasons, with 43% and 38%, respectively. Due to a high perception of frequent turnover in public administration (for political reasons), respondents from Albania are the only ones choosing job certainty as the second reason for choosing the private sector, with 49% (8 points more than in 2022).

Figure 33: If you prefer to work in private sector, what are the main reasons for that?
(Those who prefer working in private sector, N=1186, maximum 3 answers, %)



The quality of education system in terms of its capacity to teach and prepare the skills necessary for the labour market is assessed in Figure 34 based on perceptions collected from the region's respondents. There is an overall positive judgement on the role of the education system, with a total of 72% of respondents who either strongly agree or tend to agree with the proposed statement (an increase of 3 points from 2022). The remaining 27% is more reluctant in assigning this merit to the education system (2 points less than the previous year). At the economy level, respondents from North Macedonia agree the most with the statement (77%), with increase of 5 points from last year. Respondents from Bosnia and Herzegovina are the most sceptic regarding the role of their education system, with more than a third (36%) disagreeing with the statement. This share has increased by 6 points compared to 2022.

Figure 34: Would you agree that the skills you learned in the education system meet the needs of your job?
(Respondents who are employed or self-employed, N=3508, single answer, scale from 1 to 4, share of total, %)

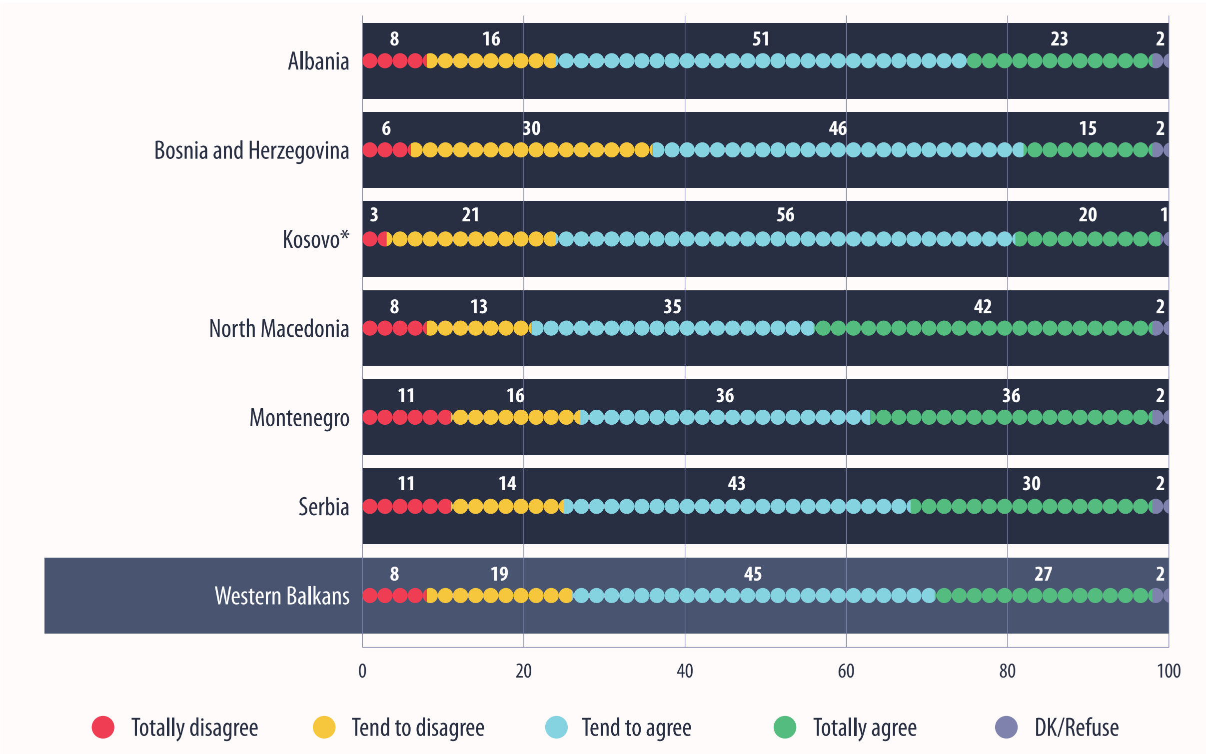
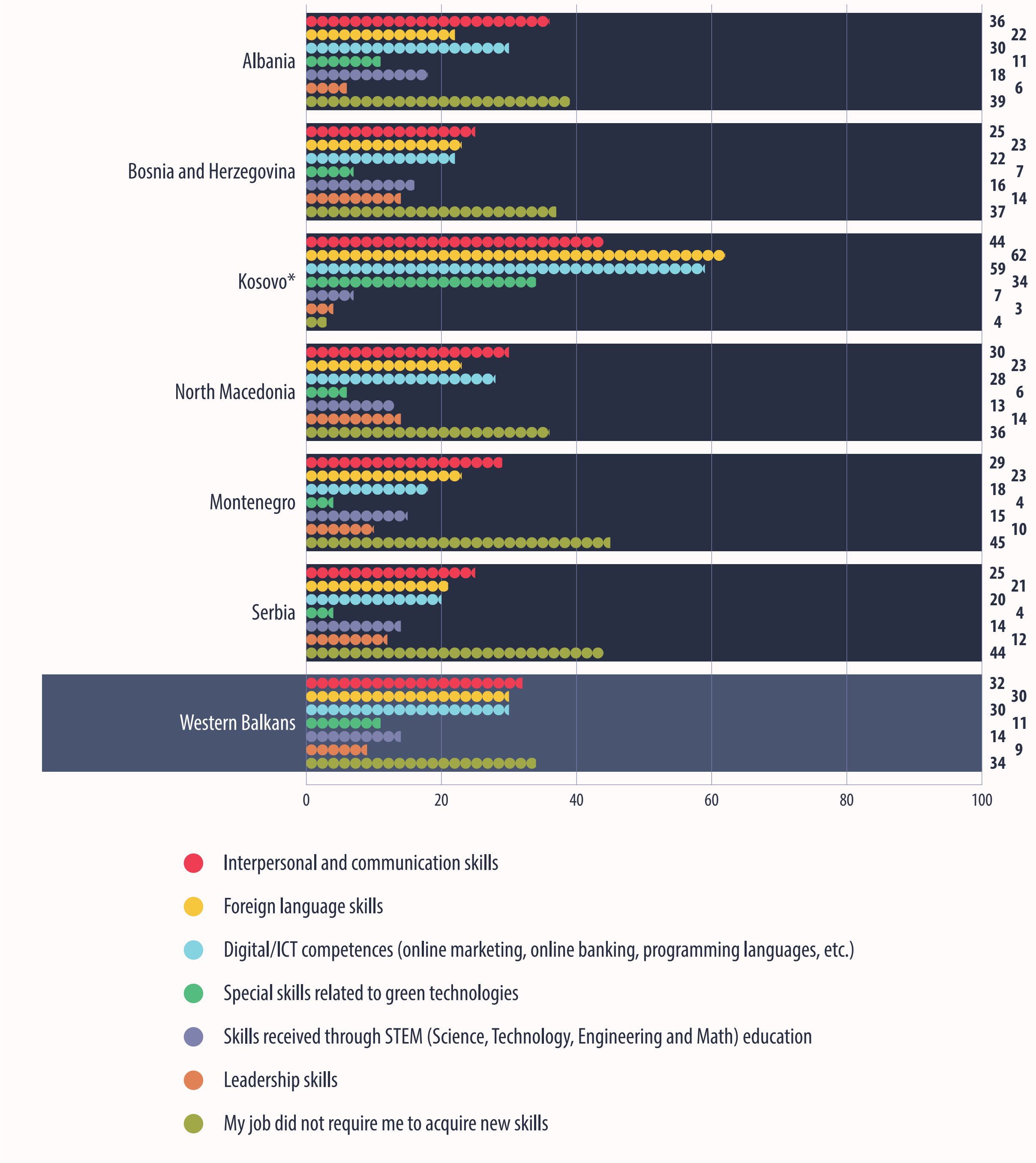


Figure 35 reports on the skills and competences that respondents from the WB consider necessary for advancement in their job or for finding one. At the regional level, respondents have identified three competences as the most important: interpersonal and communication skills (32%), foreign language skills (30%) and digital competences (30%). While the first ranked has increased by 7 points from last year, the other two have both decreased by 7 points each. At the economy level, except for Kosovo*, the largest share of respondents have replied that their job has not required them to acquire new skills. Figures range from 36% in North Macedonia to 45% in Montenegro. Respondents from Kosovo* have answered differently from the other economies, pointing out a greater need for acquiring new skills, such as foreign language (62%) and digital skills with 59% (a major increase by 22 points from last year).

Figure 35: Which of these competences/skills did you need to advance in your job or to increase your employment prospects?
(Respondents who are employed or self-employed, N=3508, multiple answers, %)



When trying to explore further the steps taken by respondents to develop their skills, Figure 36 shows a widespread pattern of passive attitude across the region. On average, more than 80% of respondents have not undertaken any action or activity to lean new competences and skills. Free online training and on-the-job training are the most used options, though with less than a fifth of respondents experiencing these methods (19% for each). Free online training has been used mostly in Montenegro (25%) and Kosovo* (22%). On-the-job training has also been chosen mostly by respondents in Montenegro (26%) and Kosovo* (24%).

Figure 36: Have you carried out any of the following learning activities to improve your skills in the last 12 months?
A - Free online training or self-study; **B** - Training paid by yourself; **C** - Free training provided by public programmes or organisations (other than your employer); **D** - Training paid or provided by your employer; **E** - On-the-job training (by e.g. co-workers, supervisors, etc.)
(All respondents, N=6027, single answer, share of total, %)

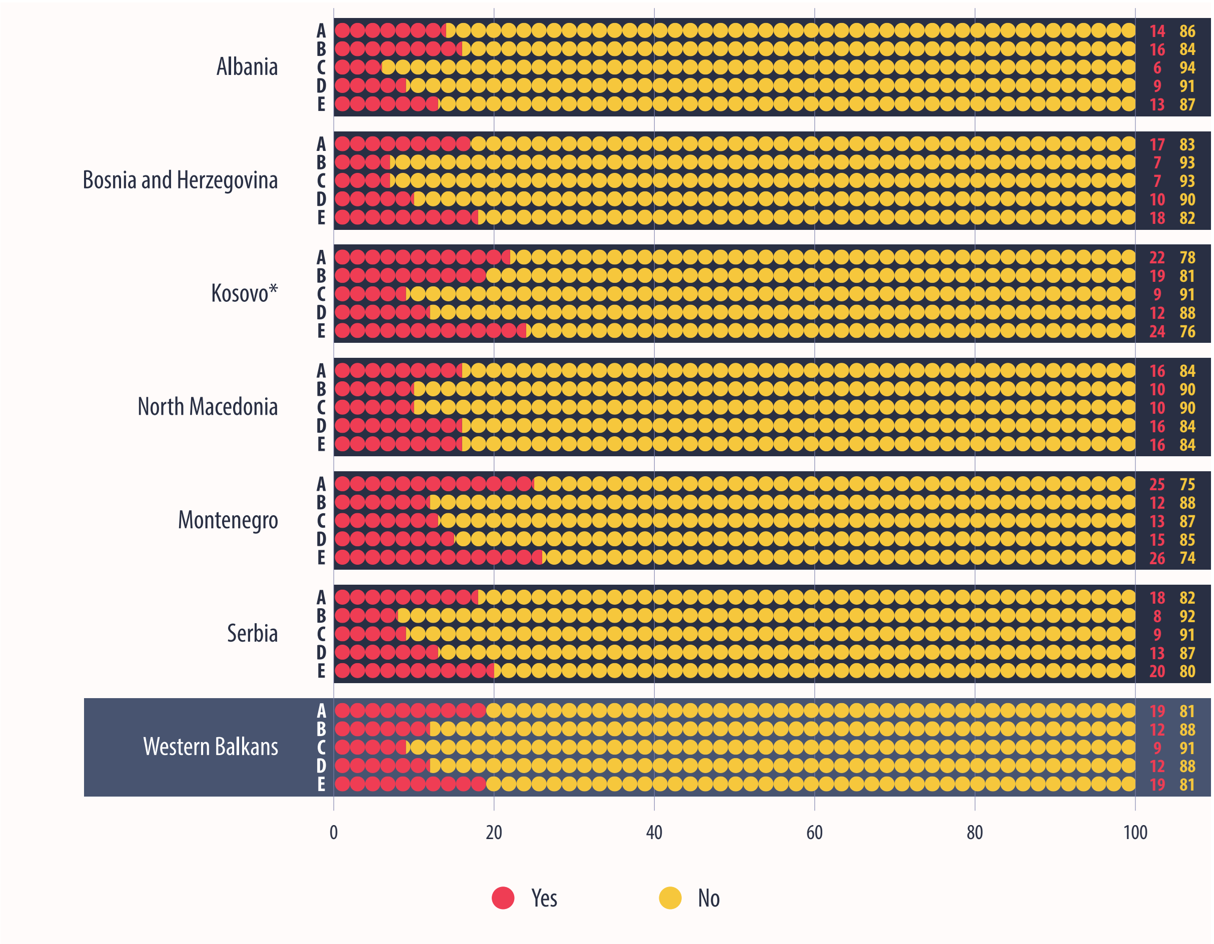


Figure 37 tries to explore and capture respondent's opinions regarding social inclusion, with a focus on several categories such as persons with disabilities, refugees, Roma population and other minorities, etc. Respondents were asked if they agree for their government to introduce measures that promote equal opportunities for these groups of their societies. There is a general positive stance of WB respondents regarding people with disabilities, with only 13% opposing such measures (although 7 points more than in 2022). However, the share of people not supporting these measures for equal access to the labour market increases considerably for some of the other groups. More specifically, more than a quarter of respondents do not agree with the promotion of such measures for refugees and Roma (27% for each), while another 25% think the same regarding other minorities. Compared to last year, all these shares have grown (by 7, 8 and 4 points, respectively). For women, youth, and single parents there is less resistance for adopting supportive measures, with 16%, 14%, and 13% of opposition, respectively.

Important differences can be spotted between economies when analysing the answers presented in Figure 37. Attitudes appear particularly non-inclusive in Kosovo* and Bosnia and Herzegovina. More than a third of respondents from Kosovo* are against such measures for any of the mentioned categories, with very minor differences or distinctions between groups. These numbers have increased considerably compared to 2022. In Kosovo*, a higher percentage of respondents now disagree or strongly disagree with supporting people with disabilities (38%, an increase of 29 points), refugees

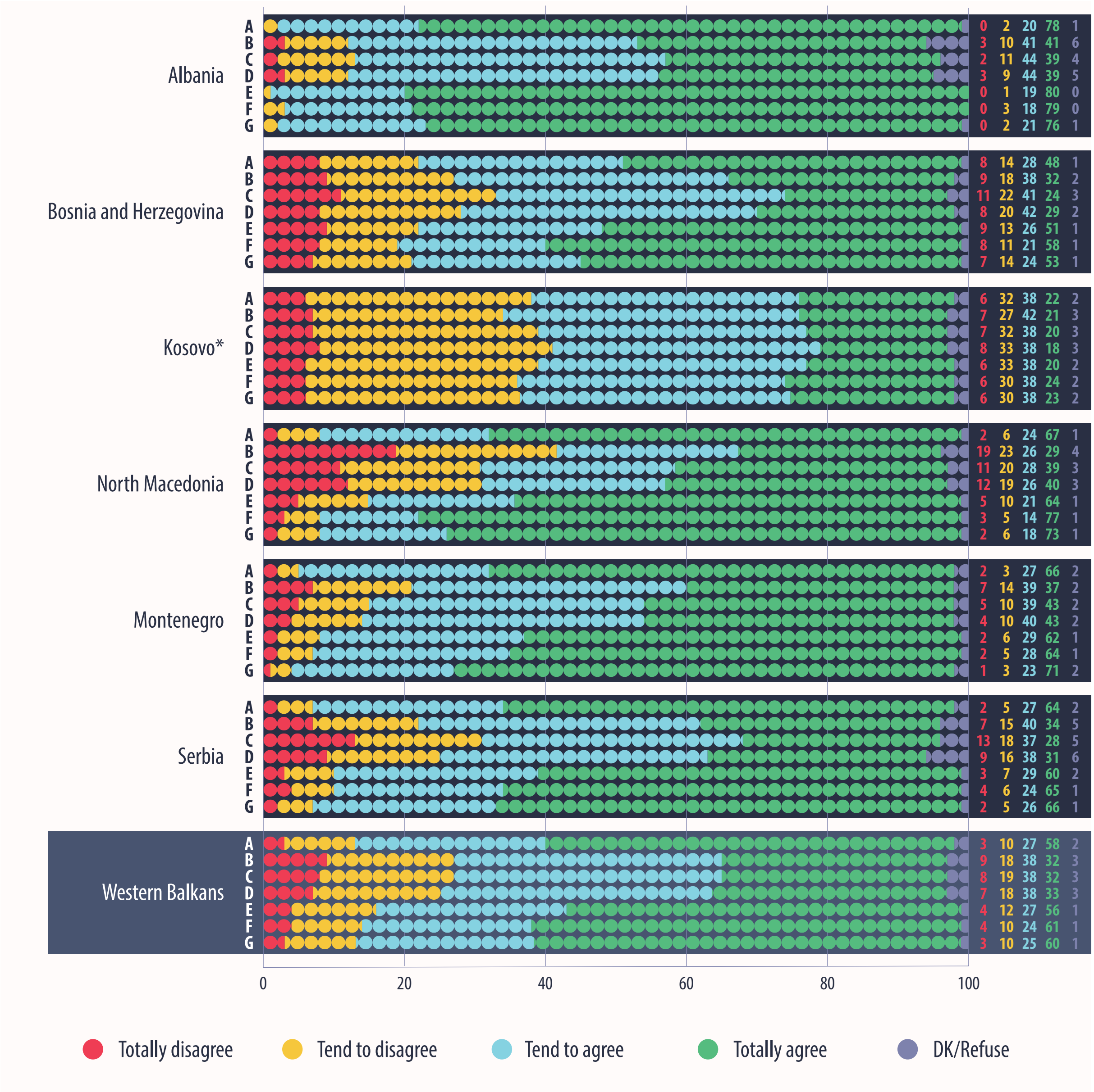
(34%, an increase of 21 points), Roma (39%, an increase of 18 points), and other minorities (41%, an increase of 21 points). Even for the other categories, where most of the economies show a more inclusive approach, respondents from Kosovo* appear to be quite opposed to support measures from the government to ensure equal access to the labour market of these groups. A considerable share of 39% is against the introduction of equal opportunity measures for women, while 36% have the same position for youth and single parents.

A similar response across categories is registered amongst the respondents from Bosnia and Herzegovina, though at lower levels. For all the groups, there is opposition to measures ranging from 11% to 22%. This attitude is particularly high for Roma (33%, with an increase of 11 points). Respondents from North Macedonia register the highest share opposing the measures for promoting employment of refugees, with 42% against (14 points of increase), while other minorities and Roma are at the second place with 31% each. However, all other groups in North Macedonia face far less opposition when it comes to supportive measures (approximately at 8%). Respondents from Serbia and Montenegro are in general in line with the attitude of North Macedonia (though in much lower percentages in opposition to measures). It is worth mentioning that 31% of respondents from Serbia oppose employment measures for equal access for Roma (which is almost the same as in 2022, with only 1 point of increase). Other minorities and refugees should also be excluded from the supportive measures for 25% and 22% of respondents from Serbia, respectively. Around 21% of respondents from Montenegro do not agree with their government introducing measures for opportunities for refugees, while 15% and 14% maintain this same position for Roma and other minorities, respectively.

Responses from Albania differ from the other economies, especially from Kosovo* and Bosnia and Herzegovina. While there is almost zero opposition to measures to include persons with disabilities, women, youth and single parents in the labour market, minor resistance is registered for other categories. More specifically, refugees and Roma face opposition to measures by 13% of respondents from Albania (with 8 and 7 points of increase from 2022, respectively), and other minorities by 12% (6 points of increase).

Overall, Figure 37 presents some points of concern. The sharp increase of shares of respondents who oppose measures for social inclusion and equal access to the labour market might be an indicator of the different challenges economies of the region face. This includes the increase of refugee flows, economic difficulties of households, unemployment, higher prices, etc.

Figure 37: To what extent do you agree with the following statement - The Government should provide affirmative measures - promote opportunities for equal access - to persons belonging to the groups listed below when applying for a public or private sector job?
A – Persons with disabilities (including persons with special needs); **B** – Displaced persons or refugees; **C** – Roma population; **D** – Other minorities; **E** – Women; **F** – Youth; **G** – Single parents
(All respondents, N=6027, single answer, scale from 1 to 4, share of total, %)

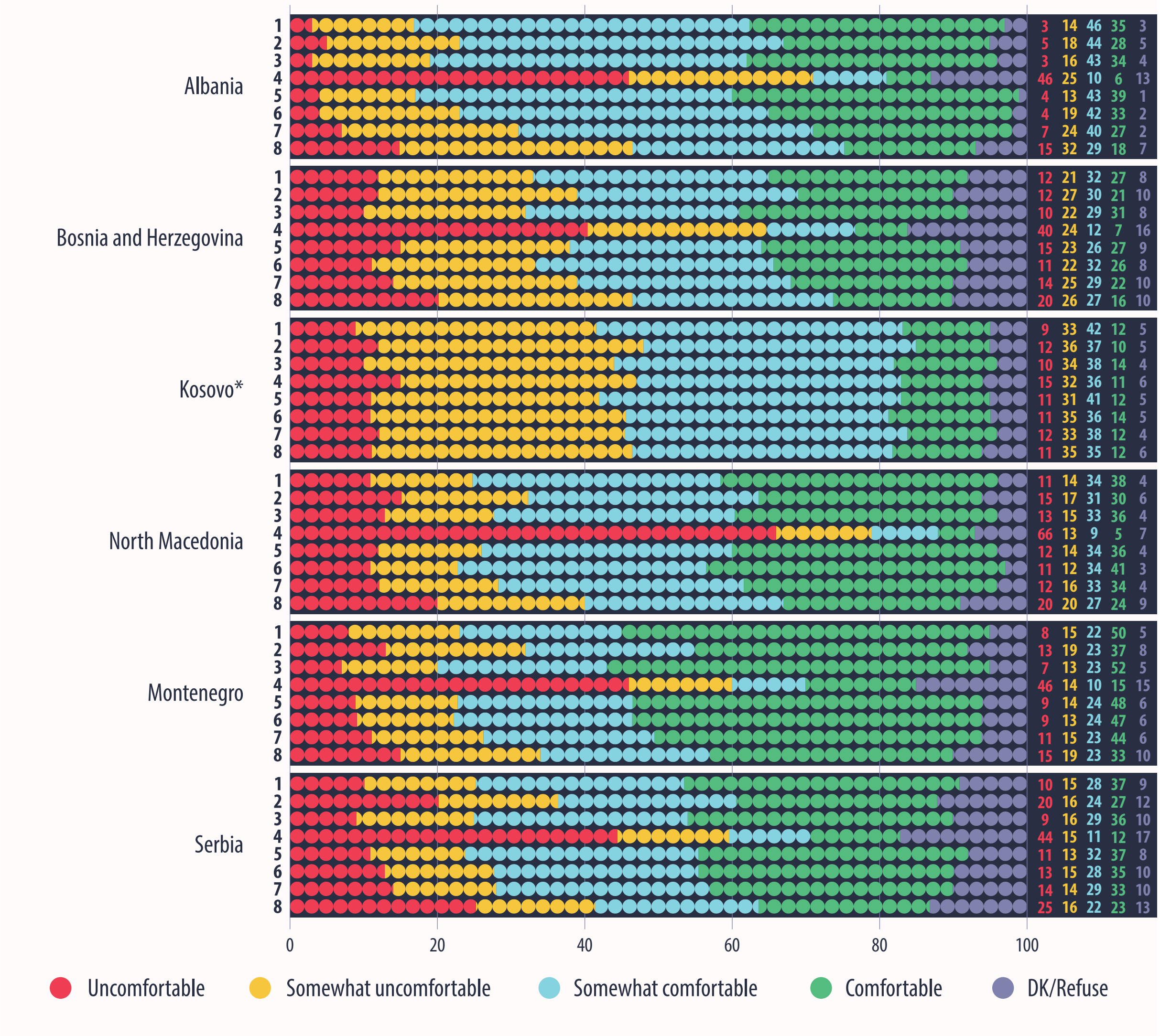


Results of Figure 37 are further explored and followed up from different angles in Figure 38. Respondents were asked about their attitude towards interacting with Roma in a variety of social and professional contexts. Almost two thirds of respondents from the region (64%) are not comfortable with their children marrying a Roma (exactly as in 2022). Renting a house to Roma and working for a Roma employer are the second and third activities that cause the most discomfort, with 43% (an increase of 6 points) and 35% (an increase of 7 points), respectively. Respondents from the region appear slightly more comfortable in other situations of engagement with Roma community. More specifically, 67% are comfortable with working with Roma and with their children going to school with Roma, while 66% are also fine with buying products from Roma or having friends who are Roma.

Figure 38: How likely is that you are comfortable with: (Results for the Western Balkans region)
(All respondents, N=6027, single answer, share of total, %)

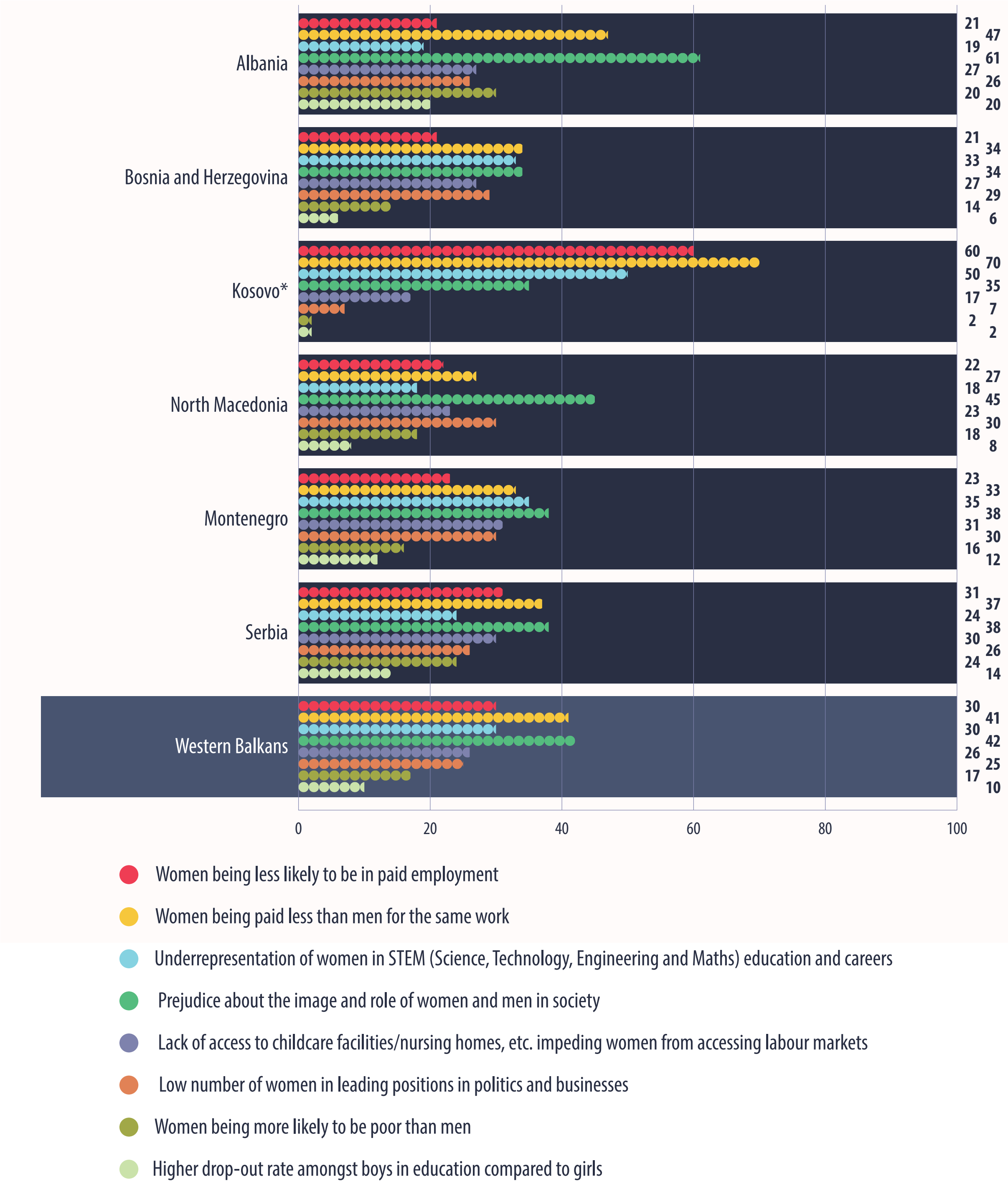
When unpacking Figure 38 on interaction with Roma, there is a similar pattern of answers amongst the respondents at the economy level. In each economy there is a general sense of being uncomfortable regarding the question on marrying a Roma. The higher opposition is registered in North Macedonia with 66% being uncomfortable and another 13% somewhat uncomfortable (79% in total, 3 points more than in 2022). Results from all economies show an above 50% share regrading this question, with the exception of Kosovo* where 47% express their opposition to such a relation with Roma (7 points less than the last year). However, respondents from Kosovo* assume the same attitude for all the other questions and situations, showing higher degrees of uncomfortableness than respondents of other economies.

Figure 39: How likely is that you are comfortable with (Results by economies):
1. – working with a Roma (incl. remotely); **2.** – working for a Roma employer; **3.** – your children going to school with Roma children;
4. – marrying Roma/your children marrying Roma; **5.** – buying products from Roma/made by Roma; **6.** - having friends who are Roma;
7. – inviting Roma to your house; **8.** – renting housing to Roma
(All respondents, N=6029, single answer, scale from 1 to 4, share of total, %)



Regarding gender discrimination, respondents from the region state that the most concerning issues are prejudice about the image and role of women in society (42%) and the pay gap (41%). Prejudices are perceived as a more urgent matter to tackle in Albania (61%), followed by North Macedonia (45%), and Serbia and Montenegro (38% each), with quite some distance from the first place. Concerns regarding women being paid less than men are higher in Kosovo* (70%), followed by Albania (47%). It is important to notice that in Kosovo* there seems to be higher awareness level regarding the importance of women being represented in STEM education and careers, with 50% of respondents affirming this factor.

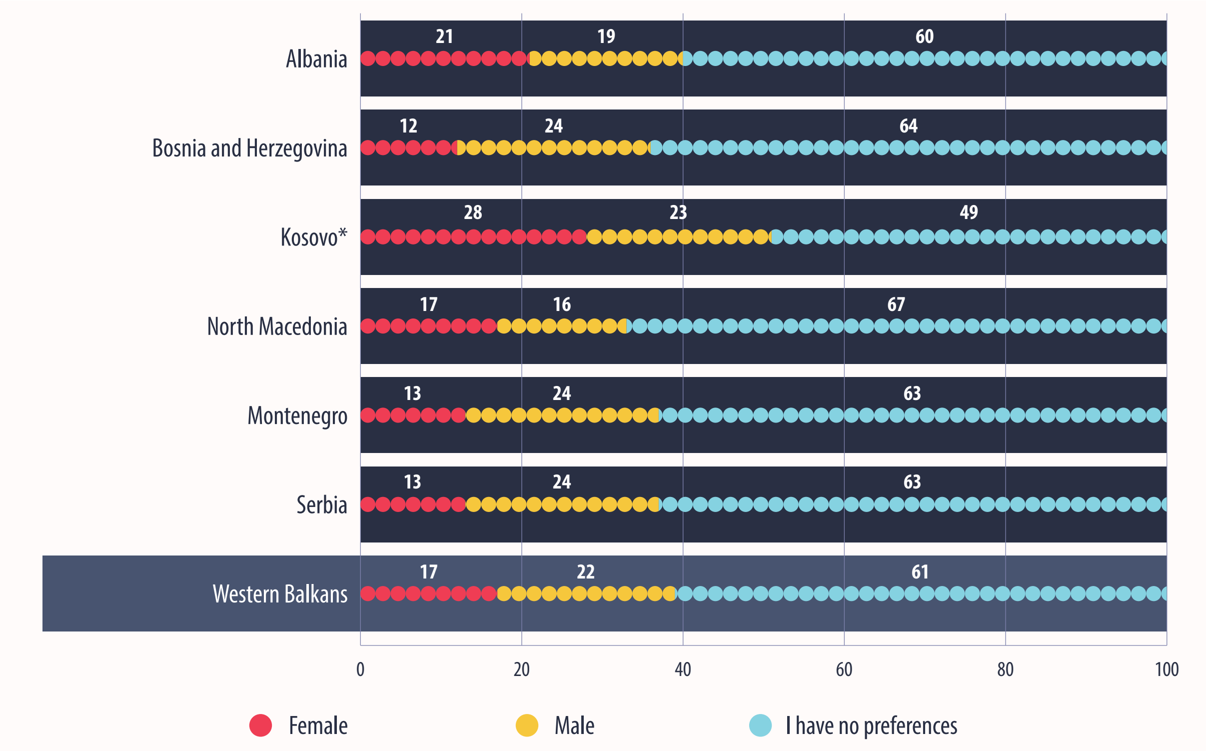
Figure 40: In your opinion, which areas related to gender discrimination should be dealt with most urgently in your economy?
(All respondents, N=6027, maximum 3 answers, share of total, %)



More than 60% of respondents from the region do not have preferences regarding the gender of their supervisor or employer (Figure 41). There is a decrease of 6 points of the share of respondents choosing this answer since 2022. While the share of those who prefer a female boss has decreased by 1 point compared to last year (reaching 17%), the preference for male figures has experienced a considerable increase of 7 points, with 22% of share. At the economy level, respondents from Kosovo* are those preferring a female boss more (28%) with an increase of 3 points from last year.

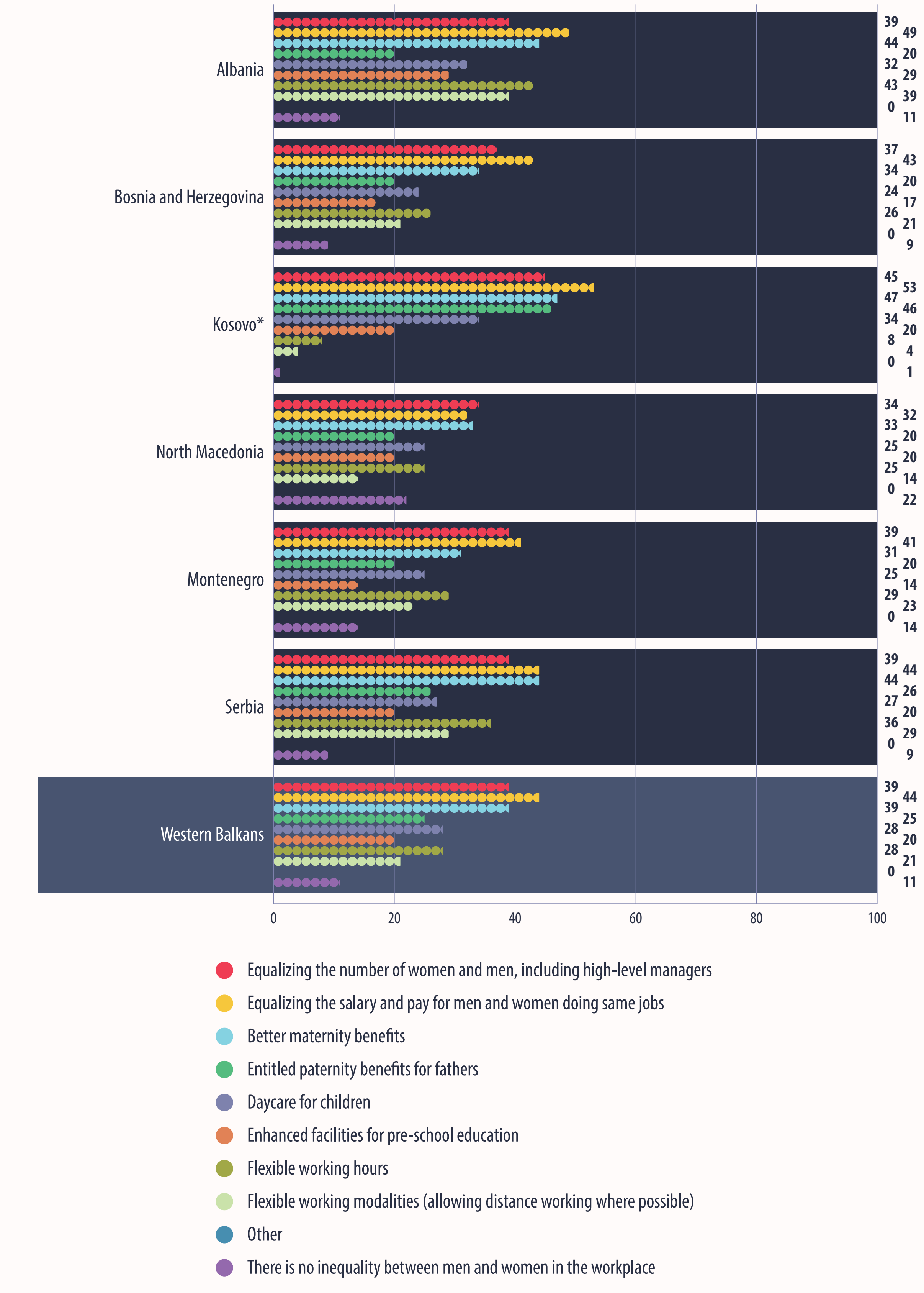
Choices for male are most popular in Bosnia and Herzegovina, Serbia and Montenegro with almost a quarter of respondents (all at 24%), with minor increase from 2022. North Macedonia leads the region in terms of the highest share of respondents not having a preference (67%), with an increase of 4 points since 2022.

Figure 41: Do you prefer to have a female or male boss at work?
(All respondents, N=6027, single answer, share of total, %)



Choices on policies and measures to address gender inequality at work are displayed in Figure 42. Addressing the pay gap between genders is the most selected option at the regional level (44%), being at the same level as in 2022. Meanwhile, equalising the number of women and men, including high-level managers, which was the most preferred measure in 2022 with 49%, has been pushed to the second position this year with 39%. At this same level, respondent consider better maternity benefits as a good solution. Filling the salary gap is the top policy for respondents in all economies (except North Macedonia), ranging from 41% in Montenegro (16 points more than last year) up to 53% in Kosovo* (14 points less than 2022). In North Macedonia, equalising the number of men and women has been deemed as the better solution (34%), followed closely by better maternity benefits (33%) and addressing the pay gap (32%). Improvement of maternity benefits as a possible measure shares the top position together with the pay gap measures in Serbia (both at 44%).

Figure 42: Gender equality at work can be improved by:
(All respondents, N=6027, multiple answers, %)



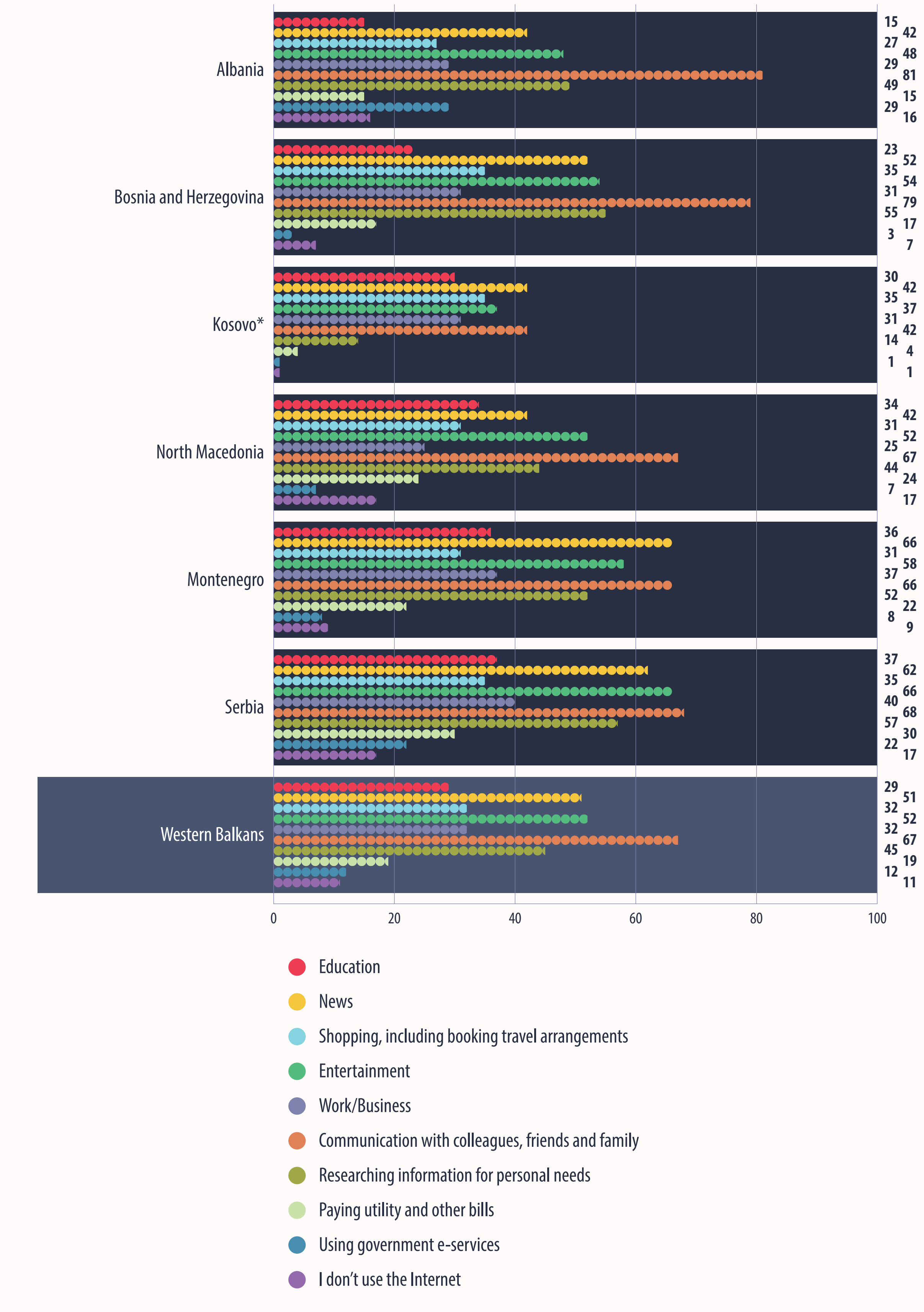
DIGITAL TOOLS AND THE INTERNET

Different digital instruments services, infrastructure and all other elements connected to the virtual space have become crucial for everyday life of citizens. From work processes to public services, all sectors have been affected by digitalisation, making it an agenda for development and competitiveness. In this regard, the WB has been quite prompt to acquire new digital tools and technology, although some challenges remain. In Figure 43, the survey has tried to capture major uses of the internet by respondents from the WB, divided into areas and practical activities. Communication with others is the most often chosen type of use (67%) that respondents make of internet services, dropping by 2 points from 2022. Around half use the internet for entertainment (52%) and for following the news (51%), and 45% claim to use it for researching information for personal needs. Only 19% of people from the region use the internet to pay the bills (4 points increase from 2022), while 11% state that they do not use the internet at all.

In all the economies of the region, communication is the primary use, ranging from 42% in Kosovo* up to 81% in Albania. Respondents from Montenegro and Serbia lead the chart on the use for news purposes (66% and 62%, respectively) and for entertainment (58% and 66%, respectively). It is interesting to notice that respondents from Albania present a considerable margin compared to the other economies regarding the use for government services. A high share of 29% (7 points more than last year) use them, considering the large range of services offered by the e-government platform in the economy, claimed to be 1.225 services or 95% of all public services to citizens.[5] The second economy using internet for this purpose is Serbia (17%, same as last year), while in Bosnia and Herzegovina only 3% claim to use the internet for this activity.

5 Jorgoni, E. (2022) "Albania's digital transformation of public services delivery". European Social Policy Network, June 2022. Available at: https://ec.europa.eu/social/BlobServlet?docId=25935&langId=sl

Figure 43: Have you used the Internet for the following?
(All respondents, n=6027, multiple answers, %)



Respondents from Kosovo* are the least happy with their fixed internet connection (49%) and that on their phone (46%). Respondents from Serbia and Montenegro are the most satisfied in the region claiming 88% and 87% of positive feedback on their home (fixed internet) connection, respectively. Regarding mobile connections, Serbia leads in the region in levels of satisfaction with 92% (Figure 44). At the regional level, there is a level of appreciation of 73% for both types of connection, dropping by 8 points from 2022.

Figure 44: Are you satisfied with your fixed Internet connection at home and with your mobile Internet connection, i.e. Internet access through your mobile phone?
(Respondents who have used Internet, N=5374, single answer, share of total, %)

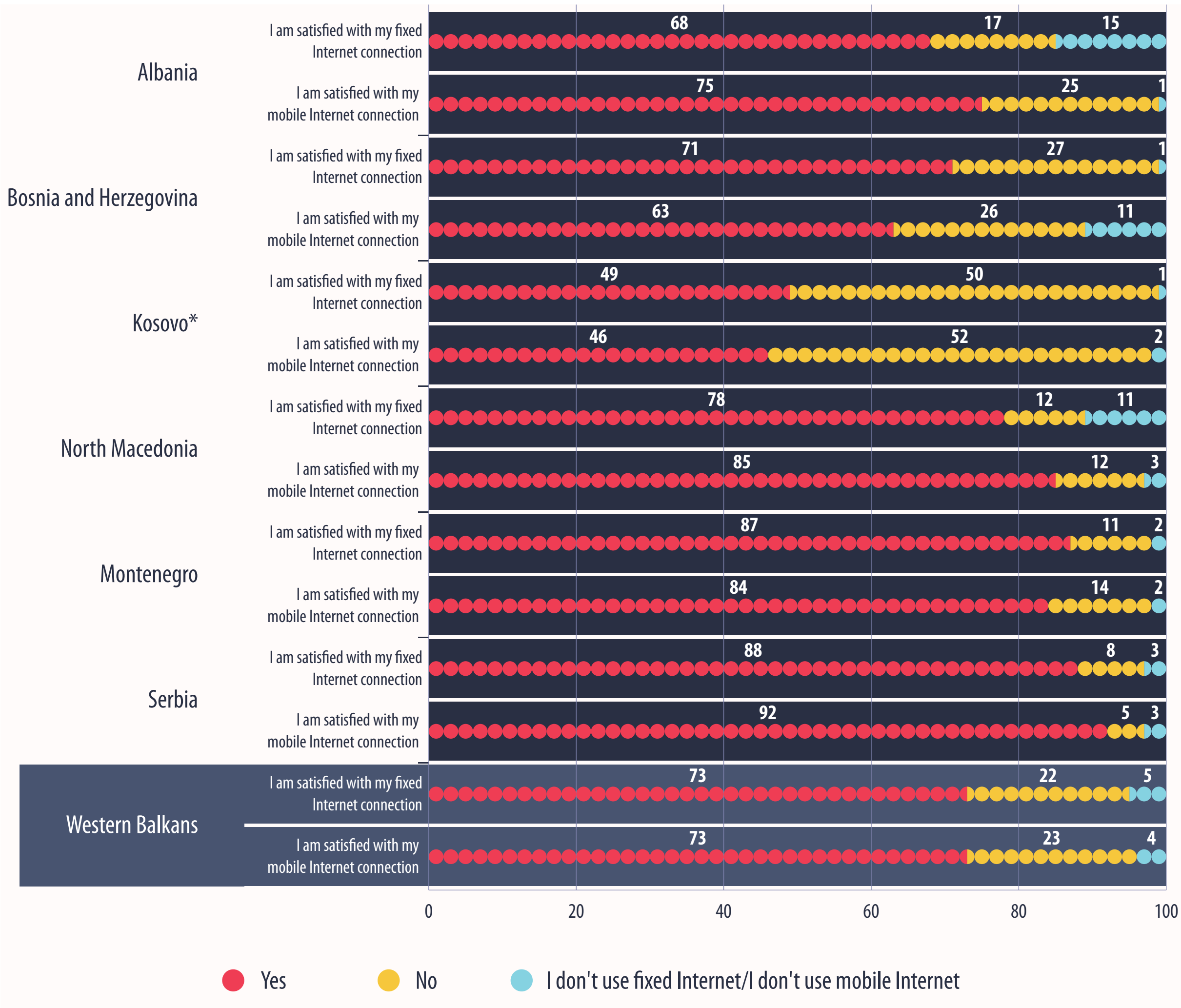
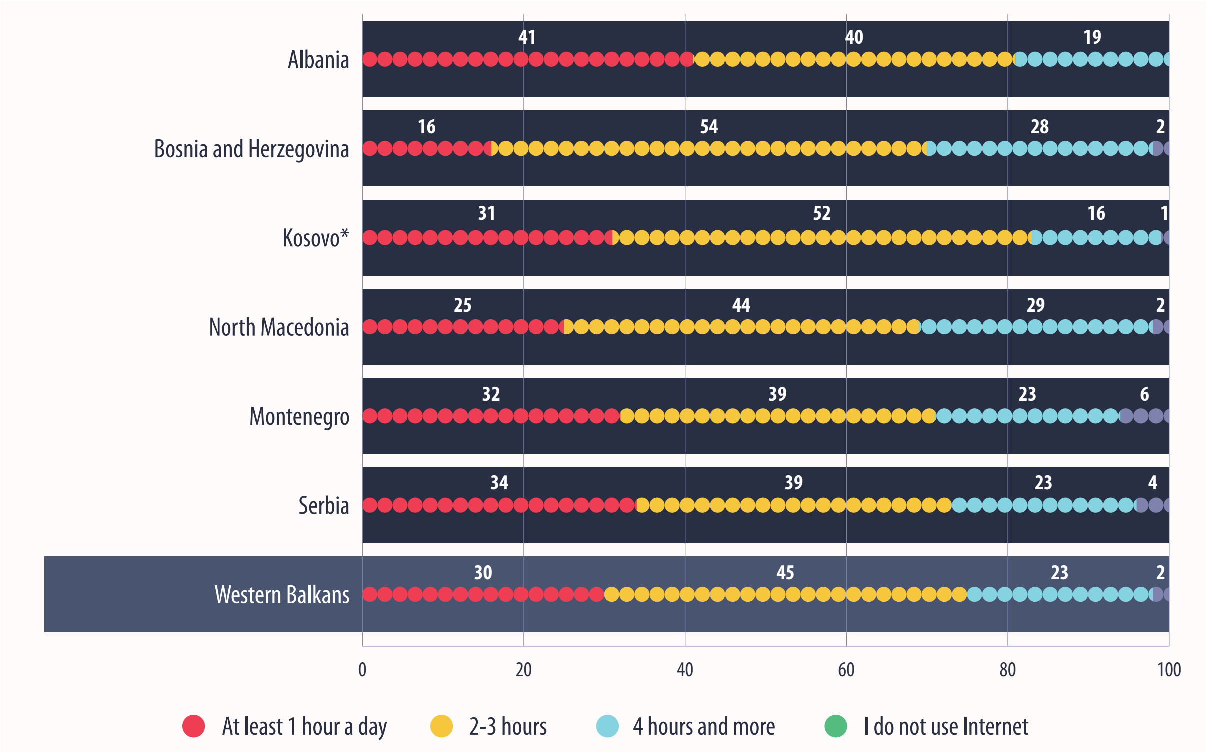


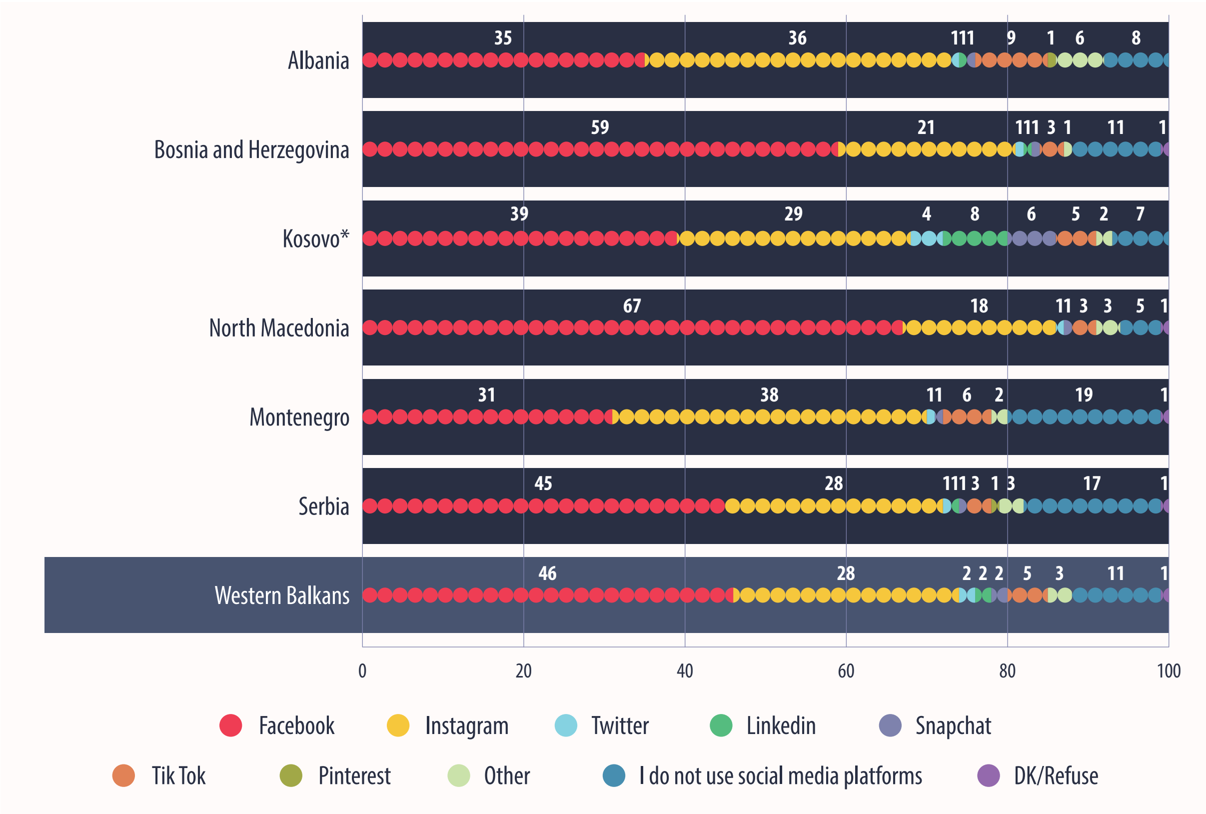
Figure 45 shows the number of hours spent on the internet by respondents, with a good portion claiming to spend 2-3 hours per day (45%), 6 points more than 2022. Around 30% of respondents spend at least 1 hour a day and 23% use the internet for more than 4 hours. In Bosnia and Herzegovina internet is used the most compared to other economies, with 54% using it 2-3 hours, and 28% more than 4 hours. Both these groups have increased from last year, by 12 and 7 points, respectively. On the other hand, respondents from Albania refer the least to the use of internet, with 41% using it 1 hour per day or less (10 points more than in 2022).

Figure 45: How many hours do you spend on Internet (e.g. on social media platform, online shopping, web browsing, online banking, etc.)?
(Respondents who have used Internet, N=5374, single answer, share of total, %)



Facebook remains the most used social media platform in the WB at 46% (same as in 2022). Instagram has lost 4 points from the previous year, reaching 28%. Facebook is mostly used in North Macedonia at 67% (increased by 1 point) and Bosnia and Herzegovina at 59% (increased by 7 points). Instagram is more popular in Montenegro at 38% and Albania at 36%. The other social media platforms have very little relevance according to the survey. Montenegro scores also the highest share of respondents stating to make no use of social media platform, with 19% (4 points more than in 2022).

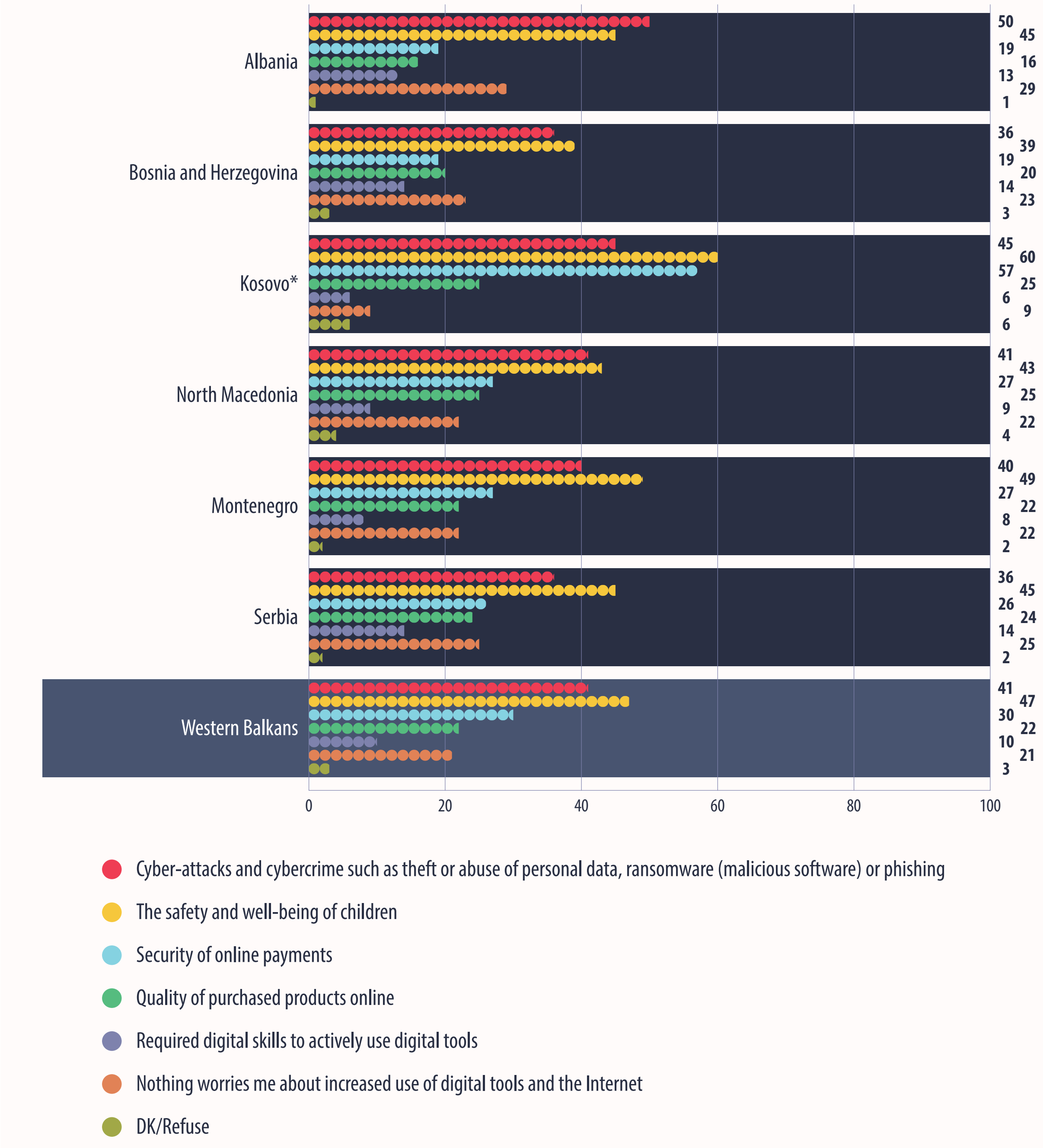
Figure 46: Which social media platform do you use the most?
(Respondents who use internet, N=5374, single answer, share of total, %)



In 2022, the WB has been under a series of heavy cyberattacks, especially in Albania, Montenegro and Bosnia and Herzegovina. Public services were shut down for several weeks and considerable damages were found in the e-government platforms and databases. These events have most probably had an impact on the answers given by respondents in Figure 47, being questioned on their main worries in relation to the use of digital tools. At the regional level, the safety of children and cyberattacks were the two main concerns at 47% and 41%, respectively. In the third place is a share of 30% of respondents who are worried about the security of online payments. Following the abovementioned events, it is important to notice that in the 2022 report (before the attacks), more than half of respondents (51%) at the regional level claimed to have no worries about using the internet. This year, this group has dropped to 21% of share for the region.

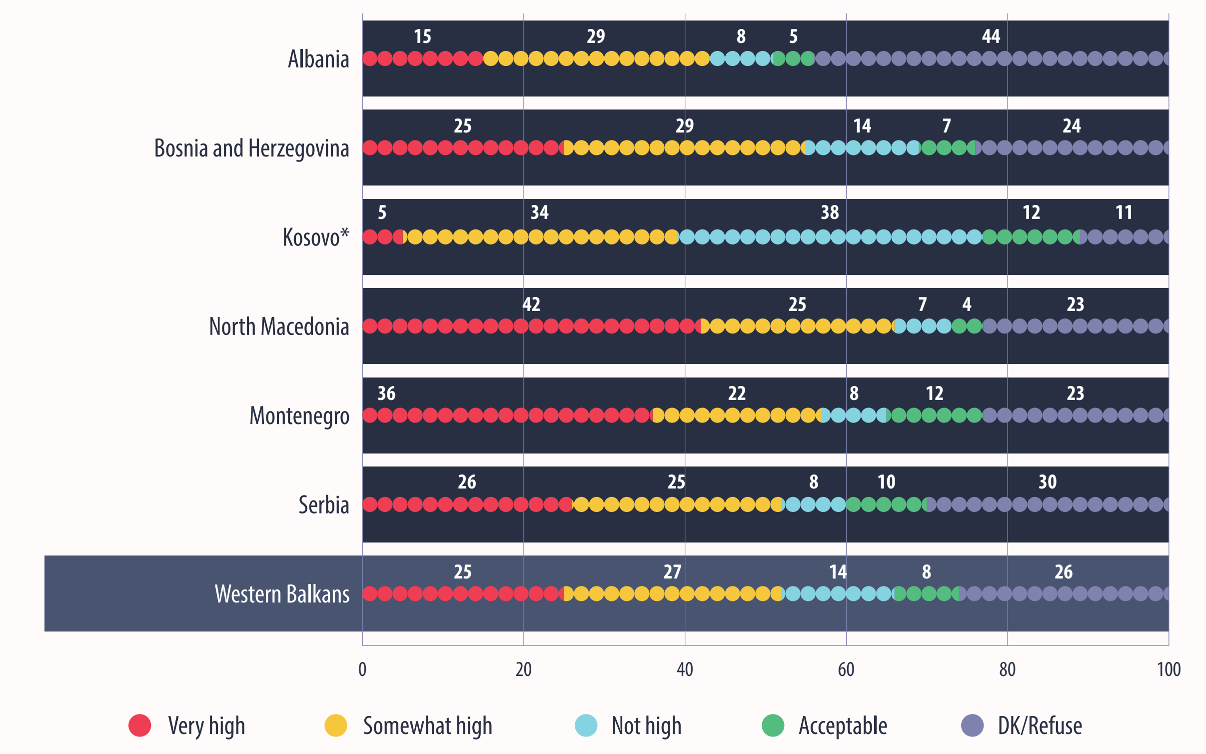
Respondents from Kosovo* are concerned the most about the safety of children while using the internet, with 60%, while in Bosnia and Herzegovina this groups reaches the lowest level for the region (39%). As expected, due to the magnitude of the cyberattack in Albania, this economy is the only one in the region placing the fear of these attacks at the top with 50% of respondents. Paradoxically, respondents from Albania are less concerned regarding the use of internet, with 29% of them expressing no worry. Online payments are a big concern for respondents from Kosovo* (57%), but with far less relevance for the other economies, reaching less than half of the Kosovo* percentage.

Figure 47: What worries you most about the increased use of digital tools and the Internet?
(Respondents who have used Internet, n=5374, multiple answers, %)



A quarter of respondents from the region consider phone costs very high when travelling to the EU (with 4 points of increase from 2022), and another 27% consider them somewhat high. Figure 48 shows that only a small portion considers the costs acceptable (8%) or not high (14%). Respondents from North Macedonia are the least happy with phone costs when travelling to the EU (67%, overall), maintaining their first position as in 2022. Respondents from Kosovo* are the least worried, which might be due to the fact that they have less possibilities to travel to the EU due to the visa regime still in place.

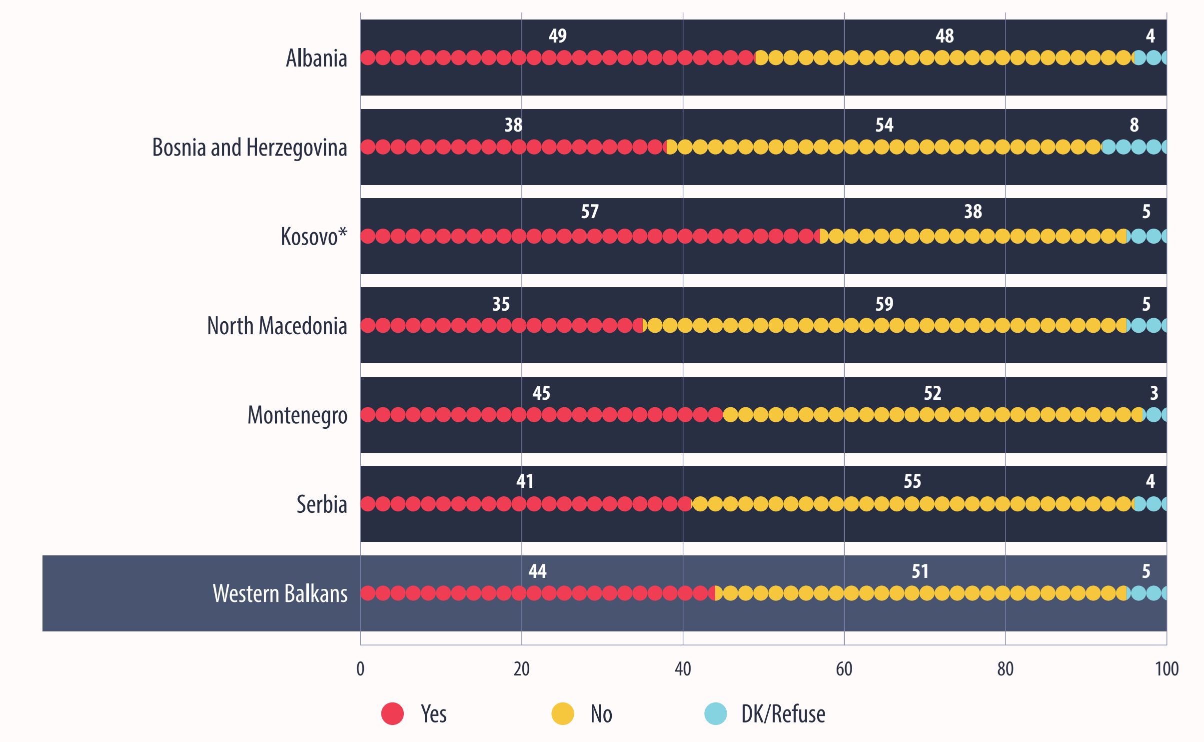
Figure 48: How would you consider phone costs when travelling to EU?
(All respondents, N=6027, single answer, share of total, %)



ATTITUDES TOWARDS MOBILITY

Mobility is another important component for the region and respondents are divided in half when asked whether they would consider moving abroad for living and working. Around 44% would opt for this alternative (5 points more than in 2022), while 51% replied negatively (2 points less from last year). Respondents from Kosovo* are more willing to leave their economy (57%), while respondents from North Macedonia are mostly preferring to live and work in their own economy (only 35% willing to leave, 5 points more than in 2022). When compared to the previous year, responses from Montenegro show important changes. While in 2022 only 27% expressed their consideration for leaving and working abroad, this year this group constitutes 45% of the sample. Respondents from Serbia have also increased the share of those who replied positively to the question (7 points more than last year).

Figure 49: Would you consider living and working abroad?
(All respondents, N=6027, single answer, share of total, %)



When asked regarding the destination where they would like to live, there is no surprise that the EU is in the first place for respondents from the region (Figure 50). More than two thirds of respondents (68%) choose the EU, while 18% would prefer the US. Increasing by 2 points from last year, preference for the WB is at 11%. At the top of respondents who choose the EU are those from Bosnia and Herzegovina (86%), exactly the same as in 2022. Respondents from Montenegro are the ones least keen to move to the EU (54%) from the 6 economies, showing the highest preference in the region for the US with 38%, 10 points more than in 2022. The region is mostly preferred by respondents from Kosovo* with 31% (17 points more than last year), which might be also conditioned by the obstacles of free travel for its residents. The region is the least preferred as a destination by Bosnia and Herzegovina and North Macedonia (with 4% each).

Figure 50: Where do you consider living and working abroad?
(Those who consider living and working abroad, n=2659, single answer, share of total, %)

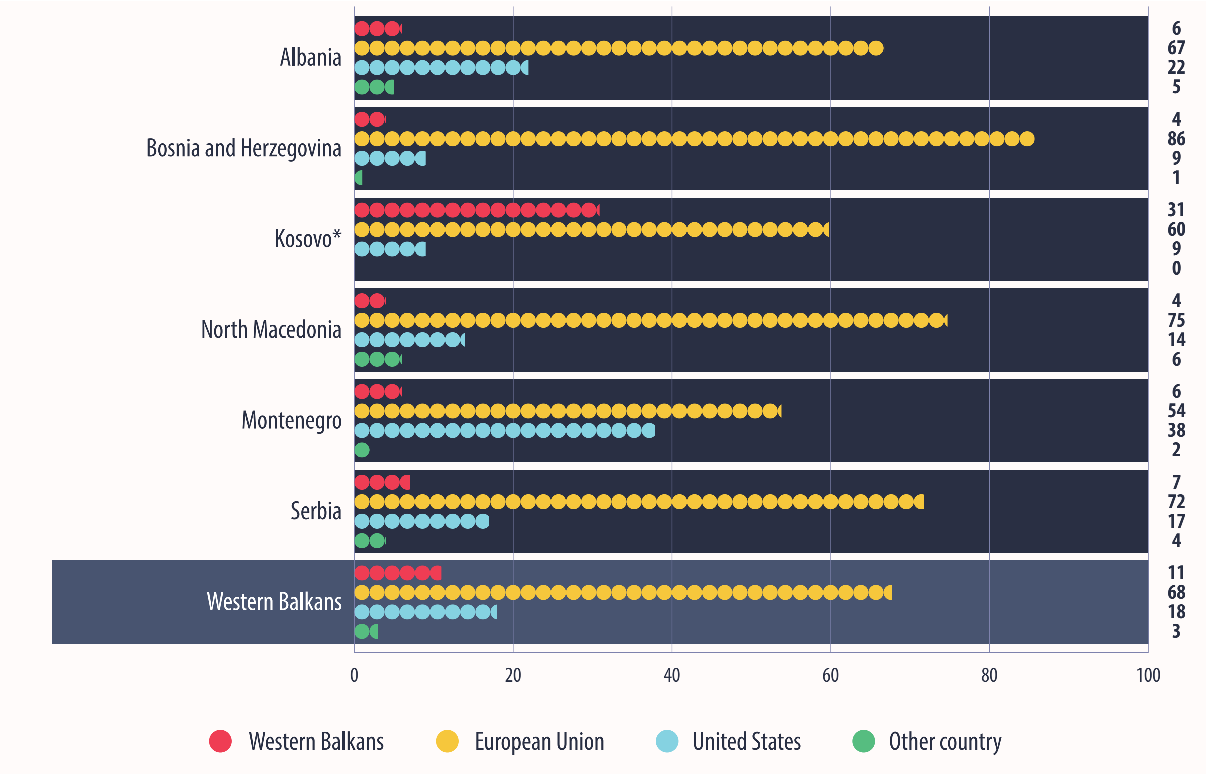
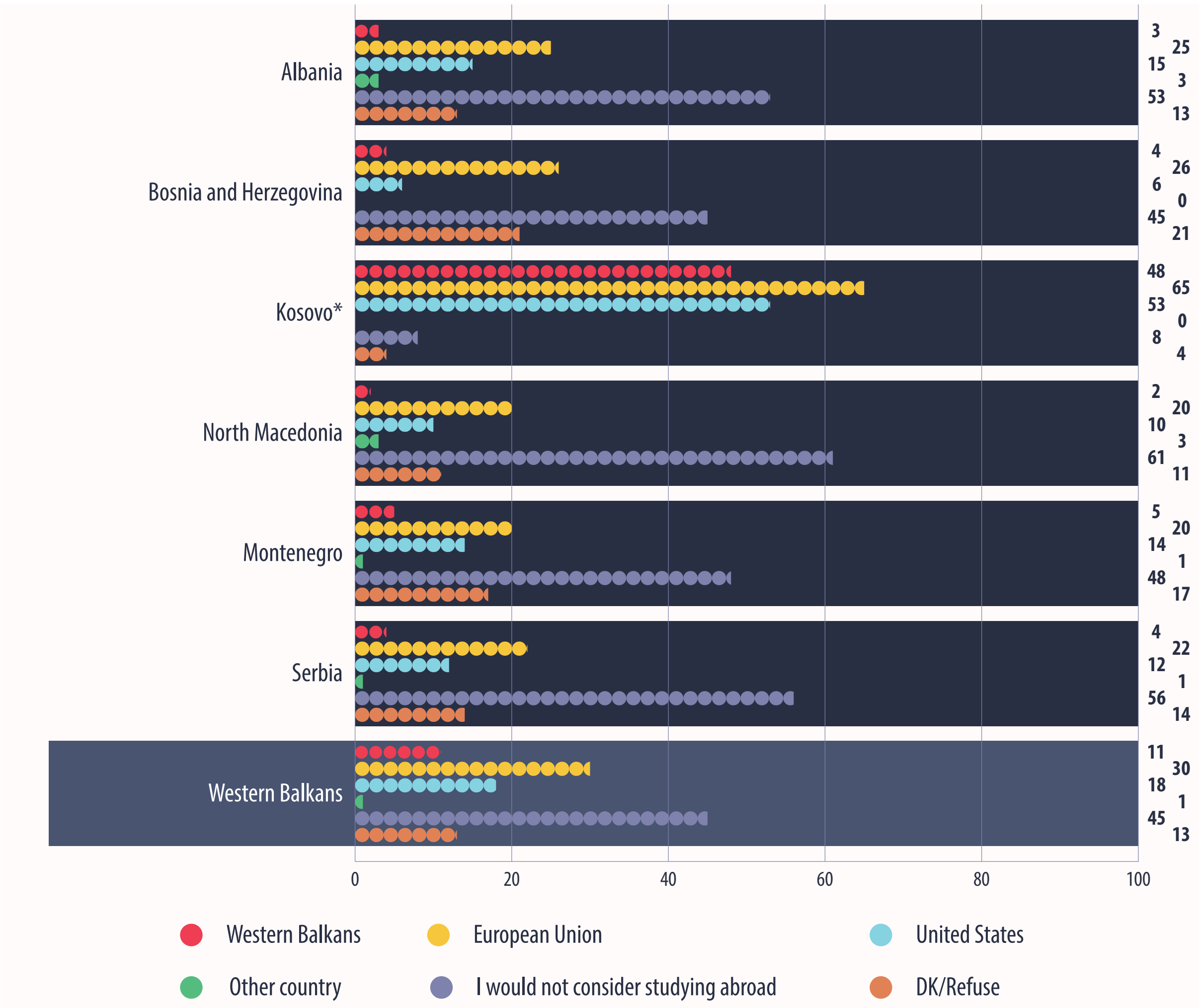


Figure 51 shows the attitude of respondents in relation to the option of studying abroad. The largest share, 45%, would not consider studying in another economy. This high percentage is also due to the fact that the sample of respondents includes different age groups (only 19% of respondents in the age group 18-24 chose to give this answer, while 60% of those between the ages 55 and 64 expressed the same position). A considerable share of 30% at the regional level expressed the willingness to study in the EU, while 18% opted for the US. Around 11% would consider the WB region.

At the economy level, most respondents (except those from Kosovo*) do not consider studying abroad, ranging from 45% in Bosnia and Herzegovina up to 61% in North Macedonia. Among those who would want to study abroad, the EU is their first choice. Kosovo* presents a different attitude compared to the other economies, because only 8% are not interested in the possibility of studying abroad. Almost two thirds of respondents from Kosovo* (65%) choose the EU as the most preferred option, while the US is in the second place with 53%. It is important to notice that almost half of respondents from Kosovo* would also want to study in the WB (48%).

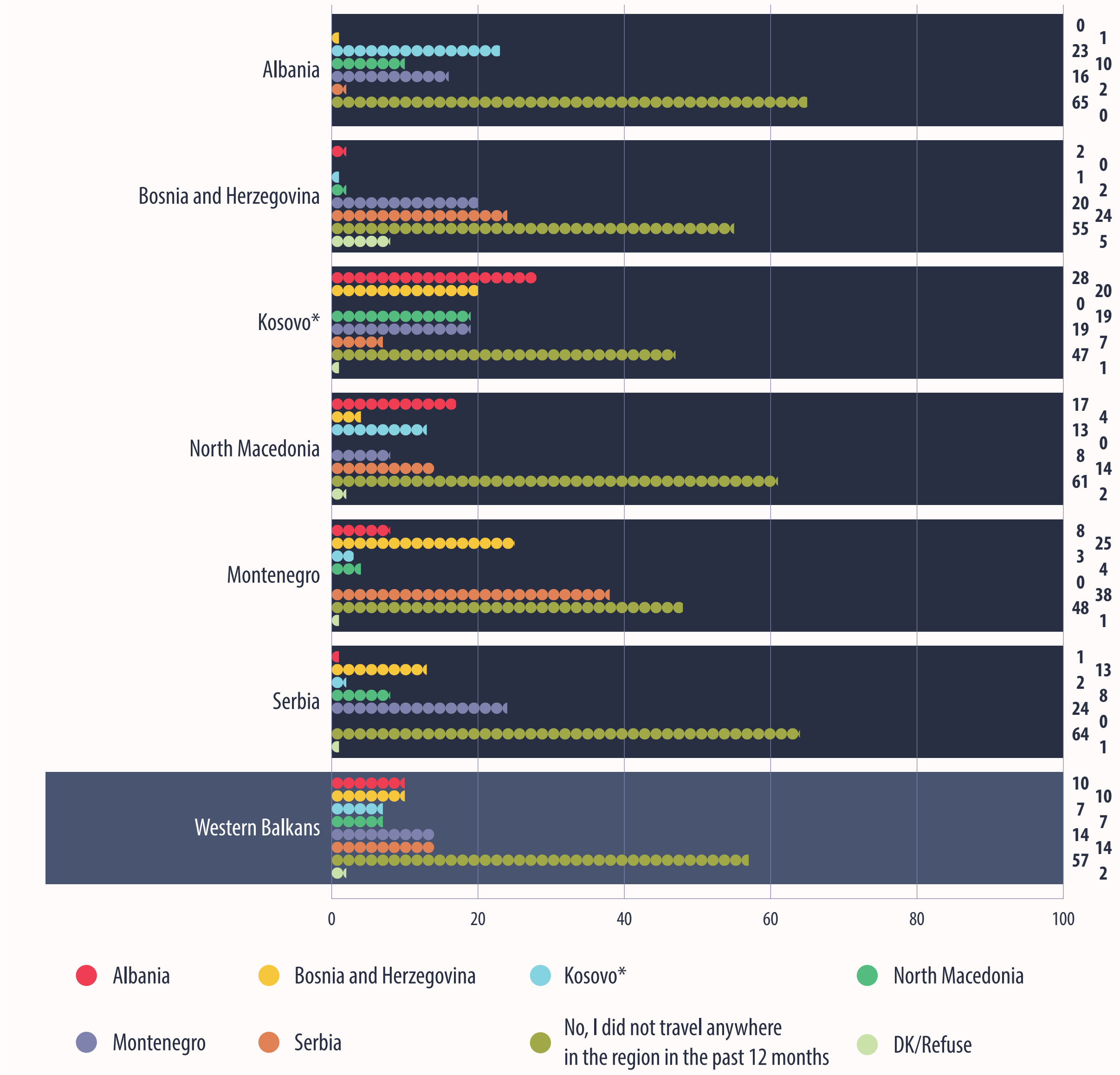
Figure 51: Would you consider studying abroad? If yes, where?
(All respondents, n=6027, multiple answers, %)



Travelling frequently within the region helps and facilitates cooperation and integration amongst the economies and societies. Data regarding travels of respondents from the WB is represented in Figure 52. Most of the respondents have not travelled once in the region in the past 12 months (57%). Though still quite high, this percentage is down by 8 points when compared to 2022. The share of respondents not travelling in the region is higher in Albania (65%) and Serbia (64%), both dropping from last year by 9 points and 7 points respectively. On the other hand, respondents from Kosovo* and Montenegro are the ones who have travelled the most in the region in the past 12 months. Less than half of respondents from these two economies claim not to have done so, 47% and 48% respectively. In the case of Montenegro, the percentage of those who have not travelled has dropped by 14 points from 2022.

In terms of destinations, respondents from Albania have travelled mostly to Kosovo* (23%) and Montenegro (16%) in the past 12 months, while respondents from Bosnia and Herzegovina often travelled to Serbia (24%) and Montenegro (20%). For respondents from North Macedonia, Albania has been the primary destination with 17%, while for Serbia and Montenegro each other's economy has been the main choice (24% and 38%, respectively). In the case of respondents from Kosovo*, travelling to Albania is still on the lead (28%) although with a drop of 8 points from last year. The other economies are also visited with around 19-20%, except for Serbia which is at 7% with a decrease of 5 points from last year.

Figure 52: Did you travel anywhere in the region in the past 12 months? If yes, where?
(All respondents, n=6027, multiple answers, %)

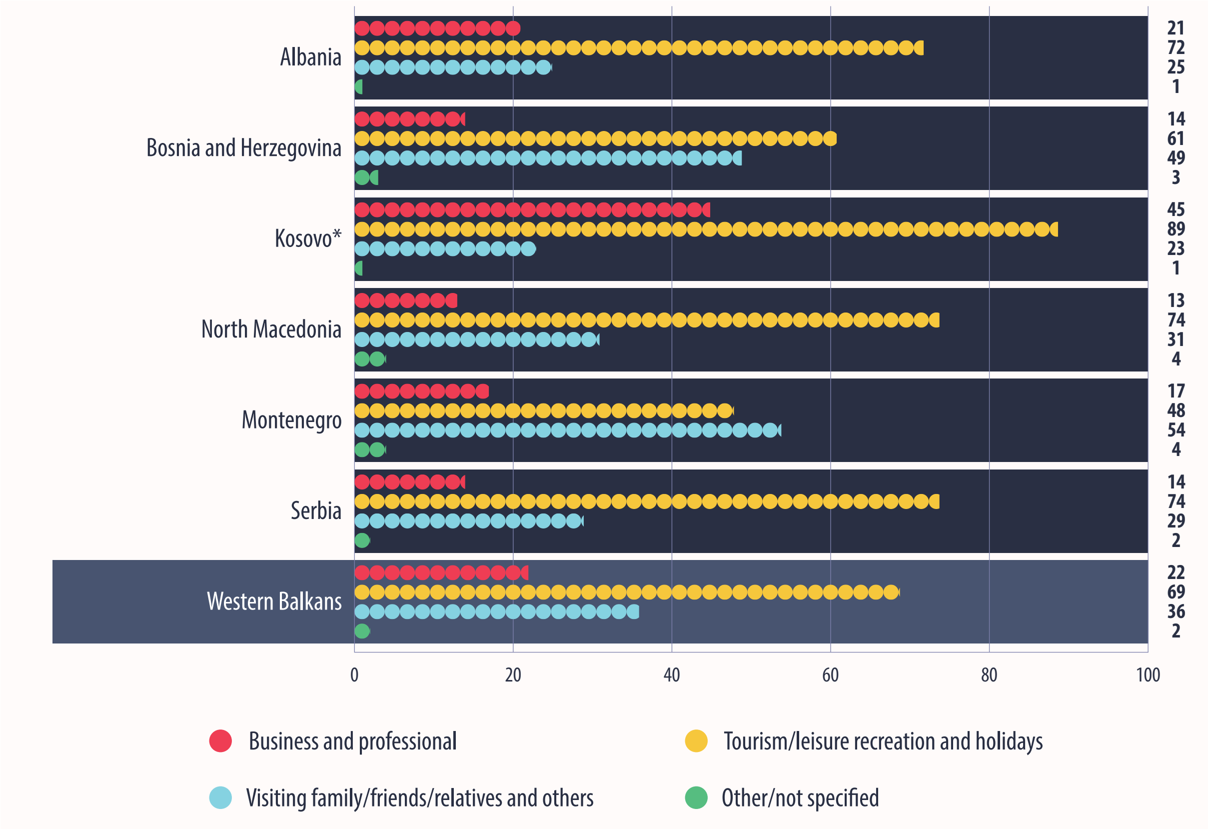


As Figure 53 shows, tourism is the main purpose for travelling within the region. The short distance, common cultural and historical elements, cheaper prices than other areas are only some of the factors that make economies of the WB attractive for each other in terms of tourism. About 69% of those who travelled in the last 12 months in the region did so for tourism activities and holidays, showing an important increase of 18 points compared to 2022. More than a third (36%) have visited family and friends, while only 22% have travelled for business or professional purposes.

Amongst those who travelled in the region in the past 12 months, respondents from Kosovo* have visited for tourism more than other economies, reaching 89% (27 points more than in 2022). For business relations, it is again respondents from Kosovo* maintaining the first place with 45%, 12 points more than last year. Respondents from Serbia and North Macedonia are in the second place for choosing tourism as a reason for travelling in the region (74% each), with an increase of 12 and 8 points, respectively. Respondents from North Macedonia are also the ones with the lowest percentage of travel for business purposes (13%), same as in the previous year.

Figure 53: What was the purpose of your travel?

(Those who travelled in the region, n=2495, multiple answers, %)



PERCEPTIONS ON TRADE AND INVESTMENT

Economic cooperation and integration in the region are a work in progress. Several initiatives and agreements have been promoted and adopted in the past years, reaching some concrete results, although still far from moving towards a free trade area. In this regard, the survey asked respondents to give their perceptions and opinions on economic links in the region, including investments and trade. Figure 54 shows that respondents in the region believe that things should improve in this regard. Respondents from Montenegro show the highest support for increasing regional economic integration with 71%, while in North Macedonia this group is at 59%. Respondents who believe that things are right the way they are have similar share across economies, ranging from 21% in Montenegro to 28% in Serbia.

Figure 54: How would you describe trade links of your economy with the Western Balkans region?
(All respondents, N=6027, single answer, share of total, %)

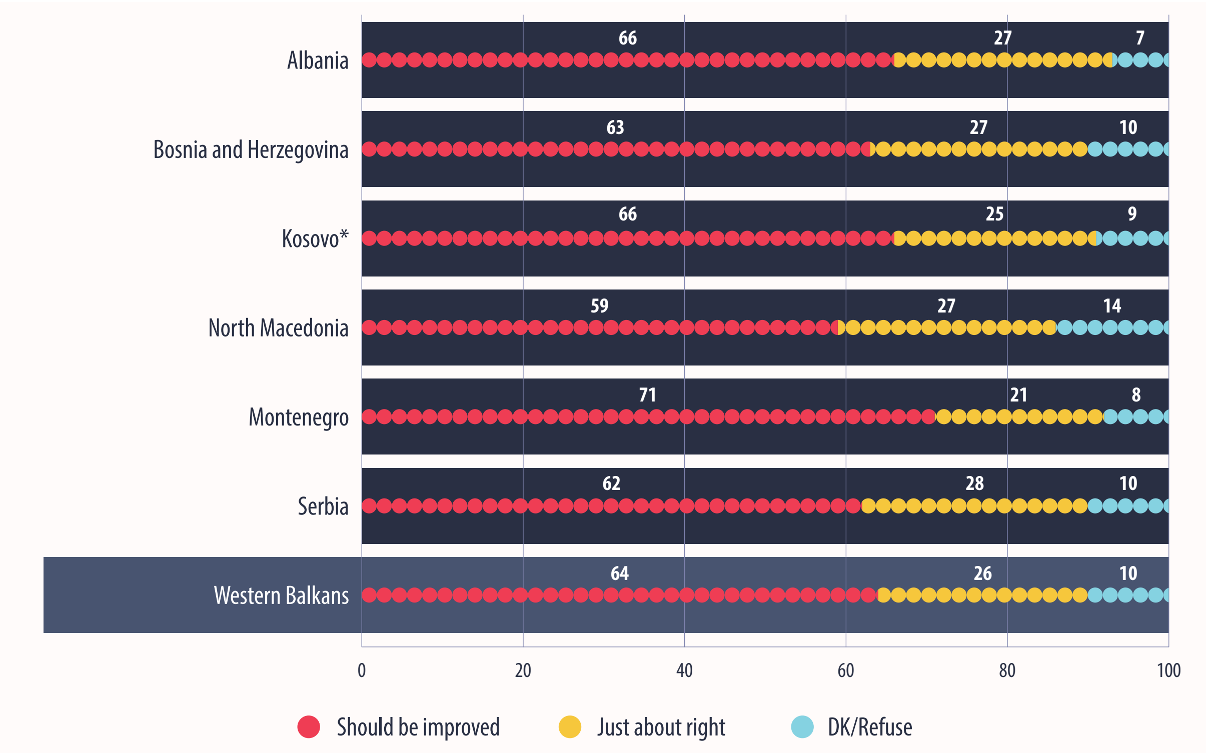
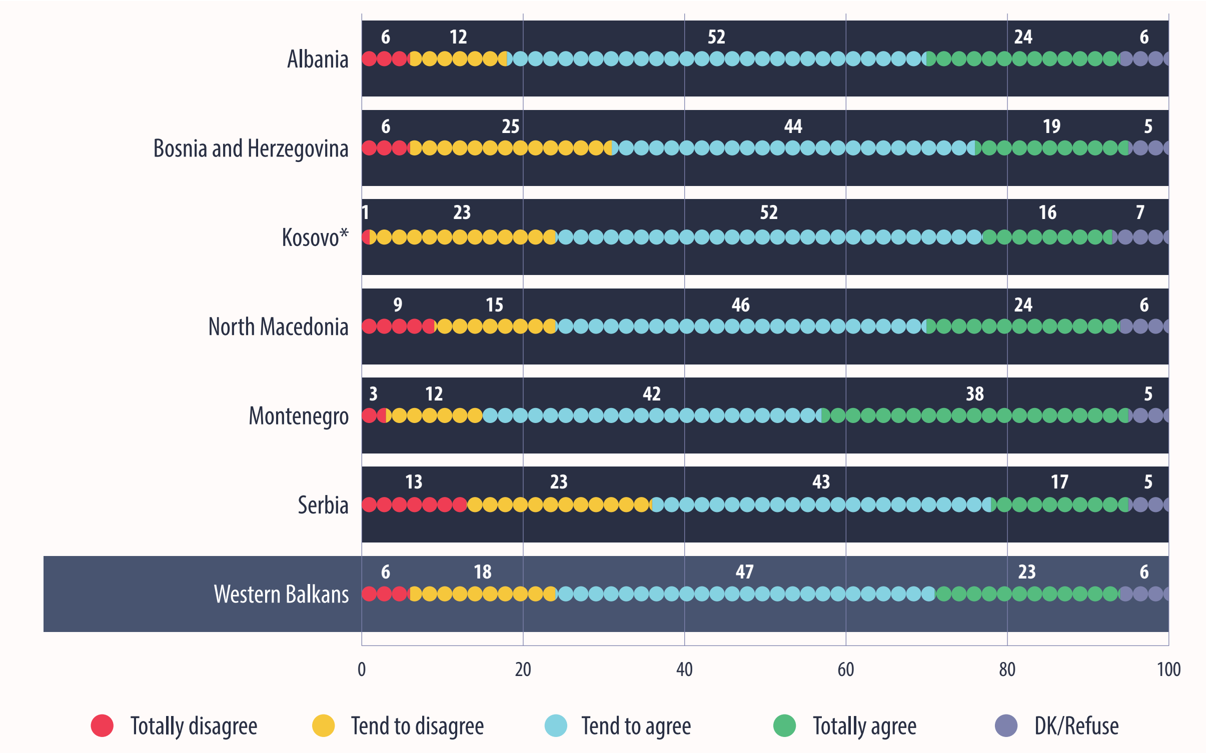


Figure 55 shows economic openness and how respondents perceive foreign companies in their economy. More specifically, respondents were asked if this development would improve choices of products and services and decrease their prices. Generally, respondents from the WB appreciate and welcome foreign companies, supporting the statement regarding the benefits they might bring into their economy. Almost half of respondents (47%) tend to agree with this position, and another 23% strongly supports it. Overall, respondents from Montenegro demonstrate the highest level of appreciation of the positive impact that foreign companies could bring, with a total of 80% either strongly agreeing or tending to agree with the statement (followed by respondents from Albania with 76%). Disagreement is present the most in Serbia (36%) and Bosnia and Herzegovina (31%). However, most of the respondents in all economies see the benefits of opening their economy to foreign companies.

Figure 55: Do you agree that, in general, entering of foreign companies in the market of your economy will improve choice and decrease prices for consumers?
(All respondents, N=6027, single answer, scale from 1 to 4, share of total, %)



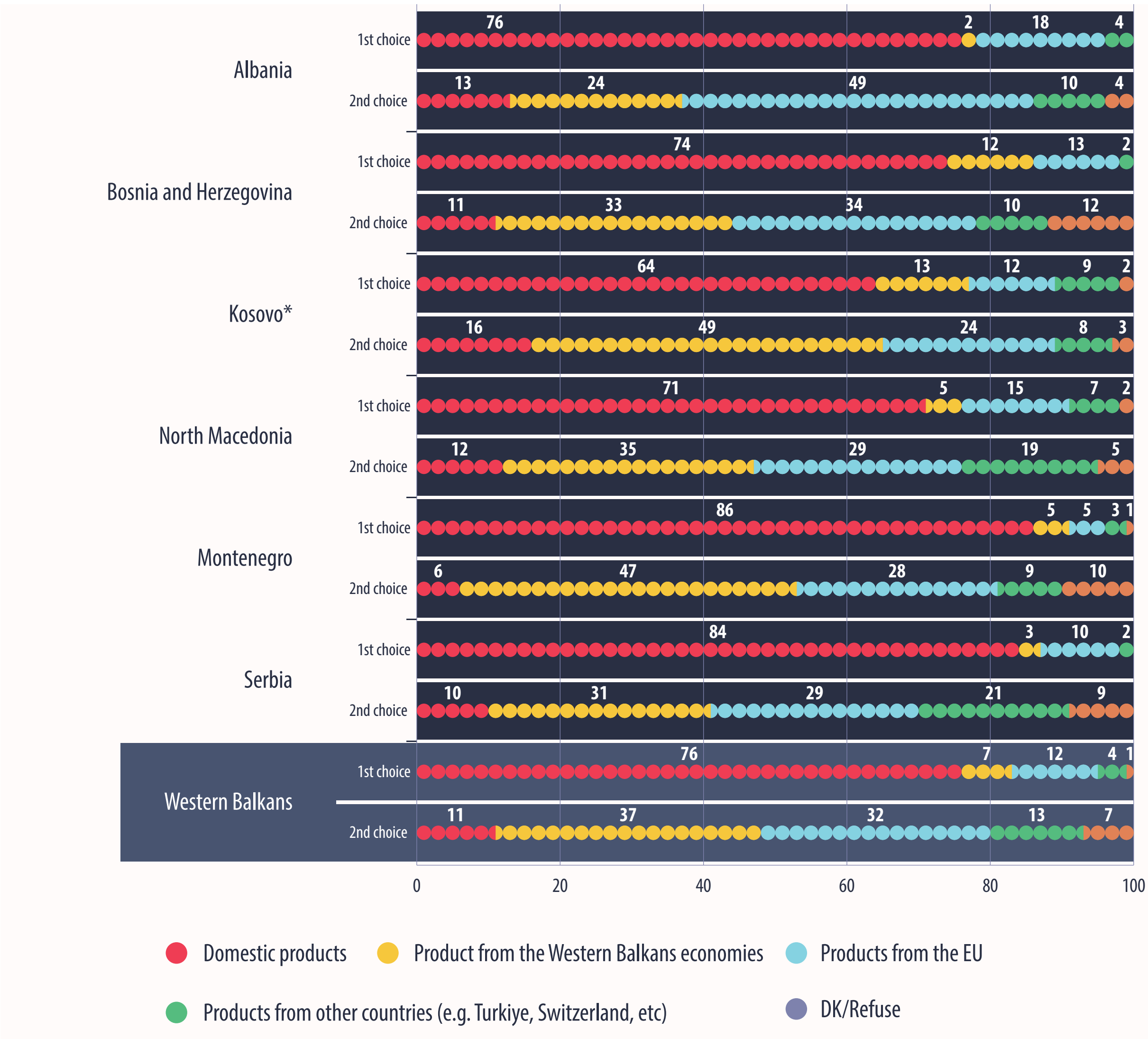
When discussing geography of trade in a more specific way, respondents from the WB are very loyal to supporting domestic products. Figure 56 shows that the first choice for food products would be from their own economy for 76% of respondents, 4 points higher than in 2022. As regarding the second choice, products from the region are preferred by a relative majority of 37%, 2 points less than last year. EU products follow with 32% and the other countries follow with 13% as a remaining group.

Domestic products as a first choice are mostly preferred in Montenegro at 86% (increased by 15 points compared to last year) and Serbia at 84% (increased by 12 points). Though support for domestic products as first choice is overwhelming across all economies, respondents from Kosovo* register the lowest share with 64%, 12 points drop from 2022. Attachment to domestic products as first choice might be related to perception of lower prices and familiarity with products, especially when considering basic (basket) goods. Second choices present a much more diversified picture amongst the economies. Almost half of respondents from Kosovo* (49%) select WB products as their second choice, increasing this share by 26 points from 2022. Montenegro follows with 47%, exactly the same as last year. The lowest preference for products of the region is to be found in Albania, at 24%, a slight decrease from last year (1 point).

Preferences are reversed when choosing EU products, with respondents from Albania showing the strongest support (49%) as a second choice, with 4 more points than last year. Respondents from Bosnia and Herzegovina follow in the second place, though with a considerable gap from the preferences in Albania (reaching 34%, 7 points more than in 2022). The lowest score for EU products has been registered in Kosovo* with 24% for the second choice, showing a significant drop by 37 points from the 2022 results.

Figure 56: If you could choose a food or beverage product from four (4) different sources: domestic products, products from the Western Balkans region, products from the EU or products from other economies (e.g. Türkiye, Switzerland, etc.), which one would be your first choice, and which would be second?

(All respondents, N=6027, single answer, share of total, %)

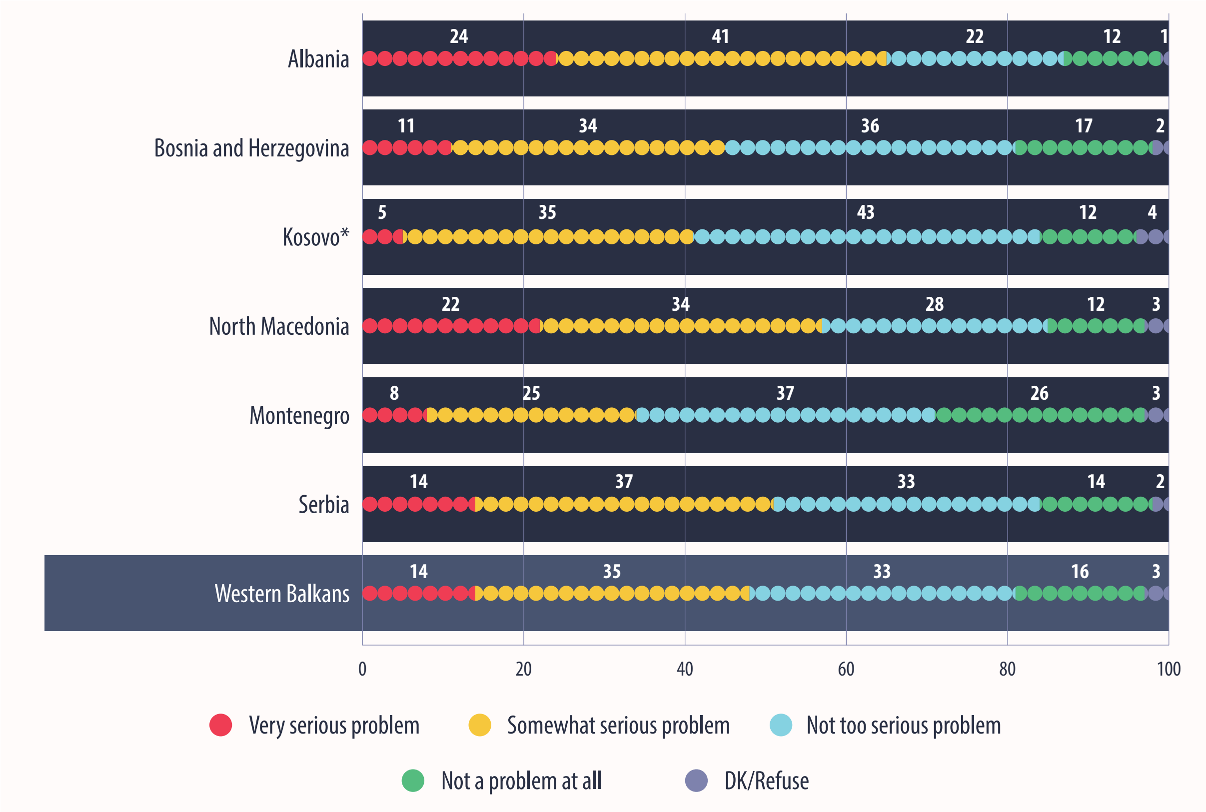


ATTITUDES TOWARDS CLIMATE CHANGE AND ENERGY

Given some of the negative developments of the past 12 months, the war in Ukraine and its impact, the increase of prices, economic challenges, etc., perceptions on priorities might have shifted, and this year's report has recorded a drop in general awareness of climate change related risks. While in the 2022 report an overall share of 67% of respondents in the region considered climate change a serious problem, this year it has dropped to 49%. Only 31% did not see climate change as a problem last year, against 49% of this year. At the economy level, the region seems to be divided in two groups regarding the answers to this question. Respondents from Albania, North Macedonia and Serbia are more worried about climate change than the others, with 65%, 56% and 51% of respondents, respectively, considering it somewhat or a very serious problem. However, when comparing these results to 2022, a considerable drop is noticed for all three economies, by 11, 20, and 22 points, respectively.

The second group shows less concern regarding climate change (less than half of respondents), showing a more significant drop from last year. Respondents from Montenegro are the least worried in the region about climate change, with only 8% considering it a very serious problem and 25% somewhat a serious problem. In total for these two categories, the share is far from 62% of 2022. Respondents from Kosovo* are second at being less concerned, with a total of 40% confirming their worry about climate change. This is almost the same as last year (41%). Meanwhile, in the case of Bosnia and Herzegovina, this year only 45% of respondents are concerned in this area, against 71% of last year.

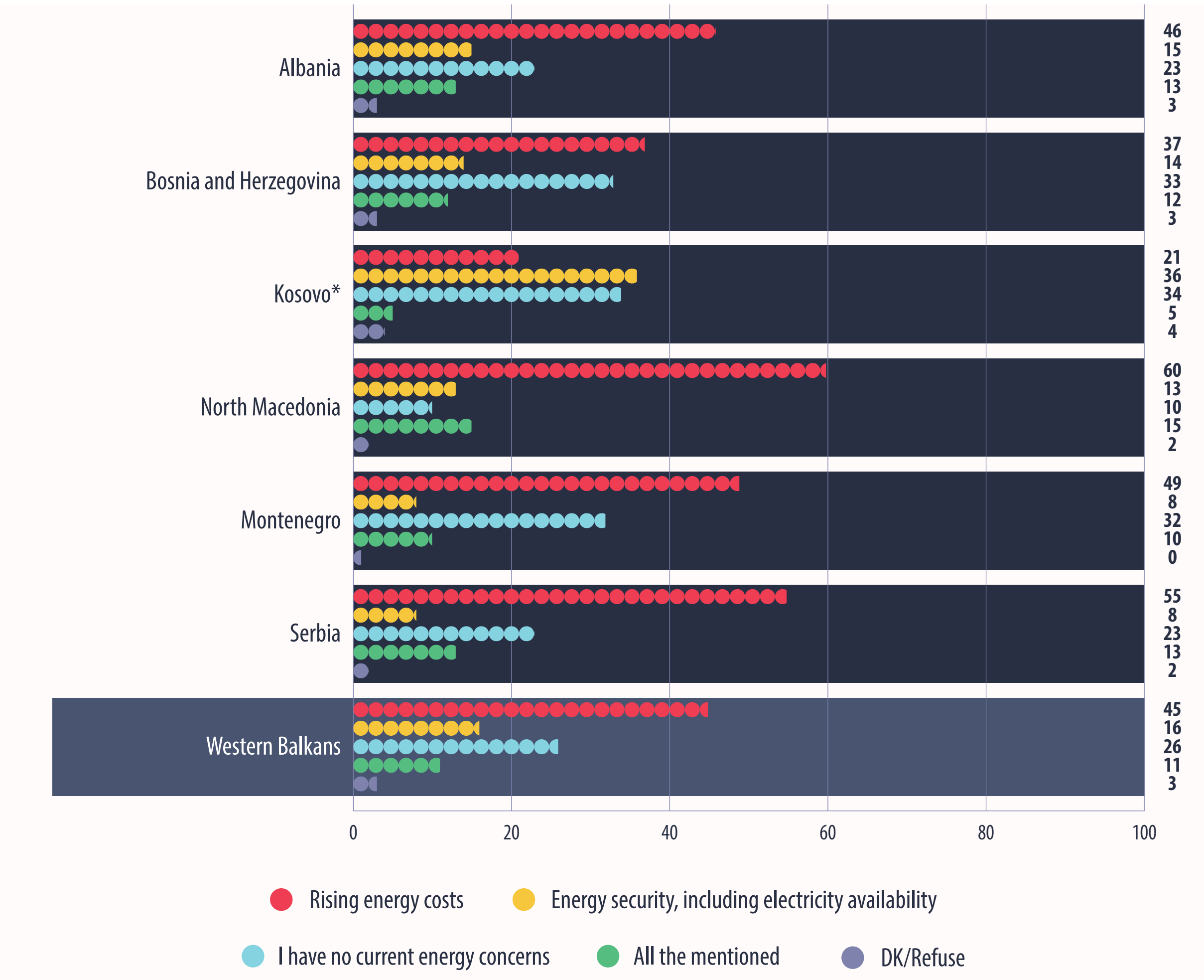
Figure 57: Is climate change a problem for your/your family's health?
(All respondents, N=6027, single answer, scale from 1 to 4, share of total, %)



Energy security and the increase in prices has been a central topic globally in the past 12 months. When asked about their worries about energy related issues, respondents from the WB pointed out that rising of energy costs is the main concern (45%), followed by 16% of those worried about energy security (availability). More than a quarter of respondents (26%) do not see energy as an important concern. Respondents from North Macedonia are the most worried regarding the rising of energy costs (60%), while Kosovo* registers the lowest percentage in the region (21%).

However, when it comes to the fear of shortage or limited availability of energy, respondents from Kosovo* are the most worried in the region (36%), followed by respondents from Albania (15%) and from Bosnia and Herzegovina (14%). Montenegro and Serbia are the least concerned for energy security, with only 8% each.

Figure 58: What is the biggest energy concern in your household?
(All respondents, n=6027, single answer, share of total, %)



Air pollution is considered the biggest environmental concern by 57% of respondents from the WB (Figure 59), followed by water pollution (44%) and soil pollution (39%). Serbia and Albania register the most concerned residents regarding air pollution, with 74% and 67% respectively, while respondents from Kosovo* seem the least worried (29%). In Kosovo*, both water pollution and soil pollution are considered more concerning (47% and 48% respectively) than air pollution. However, perceived problems regarding water are highest in Serbia (60%) out of all the economies. Though not at the top of concerns for all the other economies, waste management is considered the second greatest environmental concern in Albania, with 46% of respondents choosing it as a risk.

Figure 59: What is/are your greatest environmental concern(s) in your community?
(All respondents, n=6027, multiple answers, %)

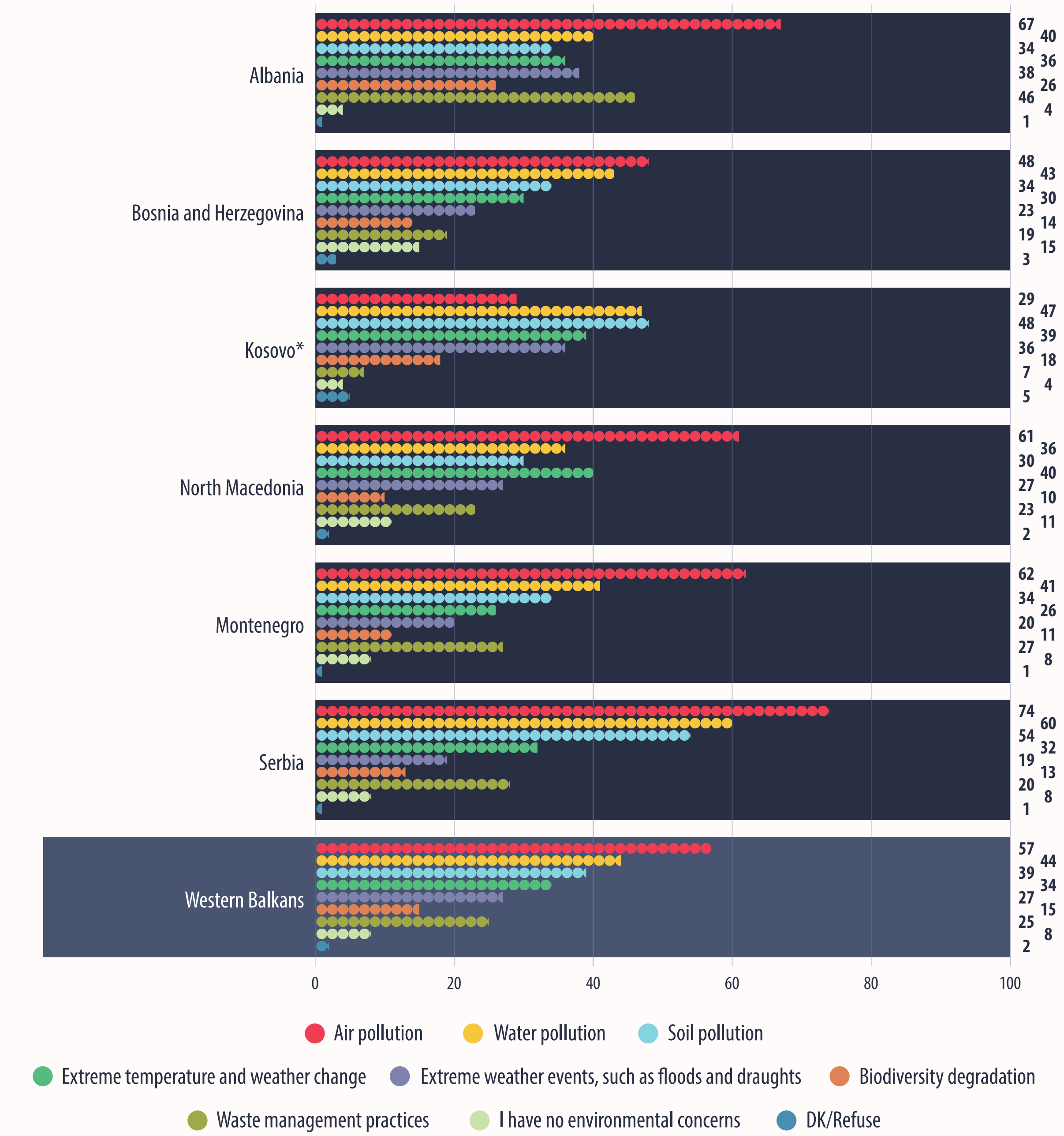
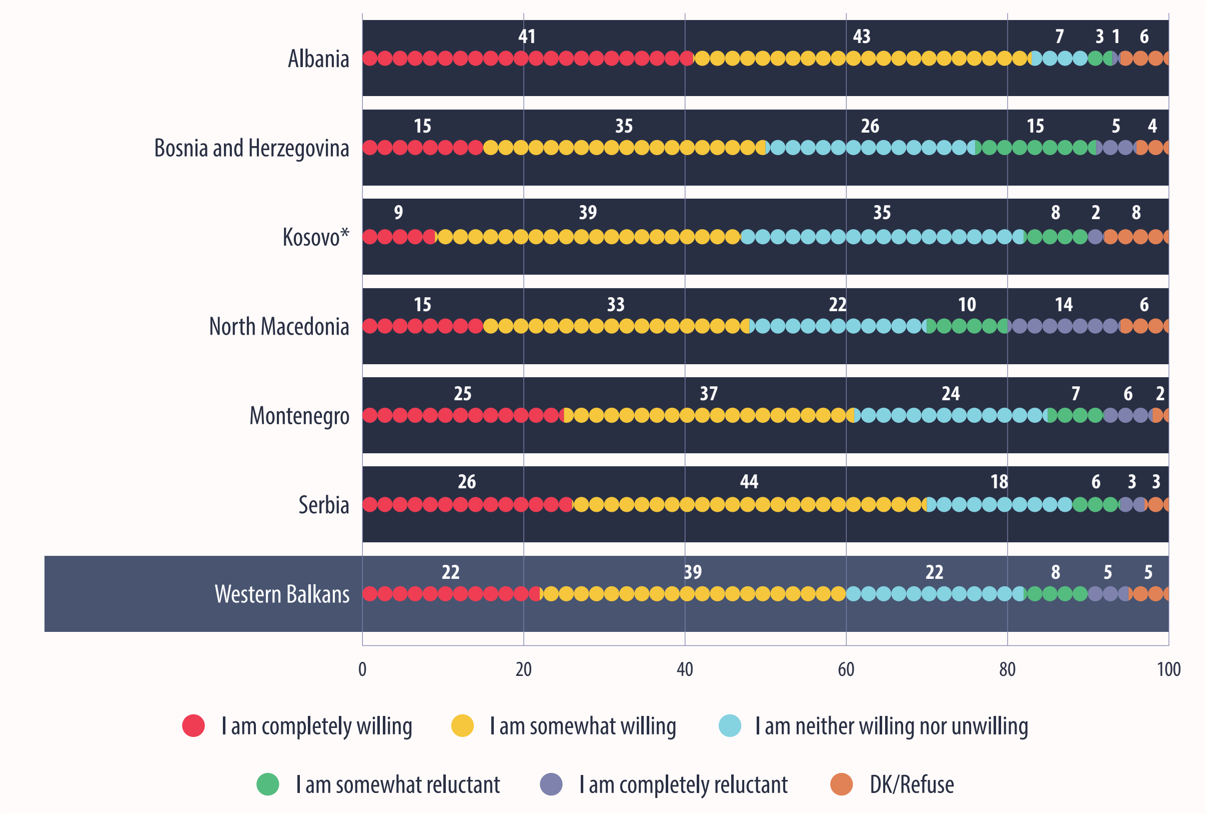


Figure 60 explores further sensitivities of WB respondents on environment concerns by asking about the level of effort they would personally commit to improve the current situation. About 22% of respondents are strongly committed to make personal sacrifices for the sake of environmental protection and improvement, while another 39% are somewhat willing to do the same. Only 5% of respondents from the region are against any personal effort in this direction. Respondents from Albania seem more enthusiastic for engaging in efforts of sacrifices to protect the environment, with a total of 84% expressing firm or moderate will. Respondents from Kosovo* and North Macedonia are the least willing in the region to engage in such activities, with only 48% each of those who express their commitment. With an overall percentage of 24%, respondents from North Macedonia score the highest against such proposal. Kosovo*, on the other hand, has the biggest group of neutral respondents (35%) claiming not to be interested in either position.

Figure 60: Would you personally be willing to put in an effort (make a sacrifice, invest time or money, change habits) to improve the environment in your community?
(All respondents, N=6027, single answer, scale from 1 to 5, share of total, %)



Amongst those who are willing to make some sacrifices, the majority chooses to avoid using single-use plastic goods (43%), followed by separation of waste for recycling (38%), and changing the way of travelling to using more environmentally-friendly solutions (32%). Respondents from Kosovo* present the highest share of those choosing to eliminate single-used plastic goods (56%), while respondents from Albania have the largest groups willing to separate waste for recycling (48%), followed by those from Serbia (46%). Respondents from Kosovo* are also keener on the other proposals, registering the highest shares for cutting down water consumption (34%) and energy consumption (33%). Buying local products is something appealing mostly to respondents from Albania and Serbia, both at 35%.

Figure 61: Would you personally be willing to do any of the following?
(All respondents, n=6027, multiple answers, share of total, %)

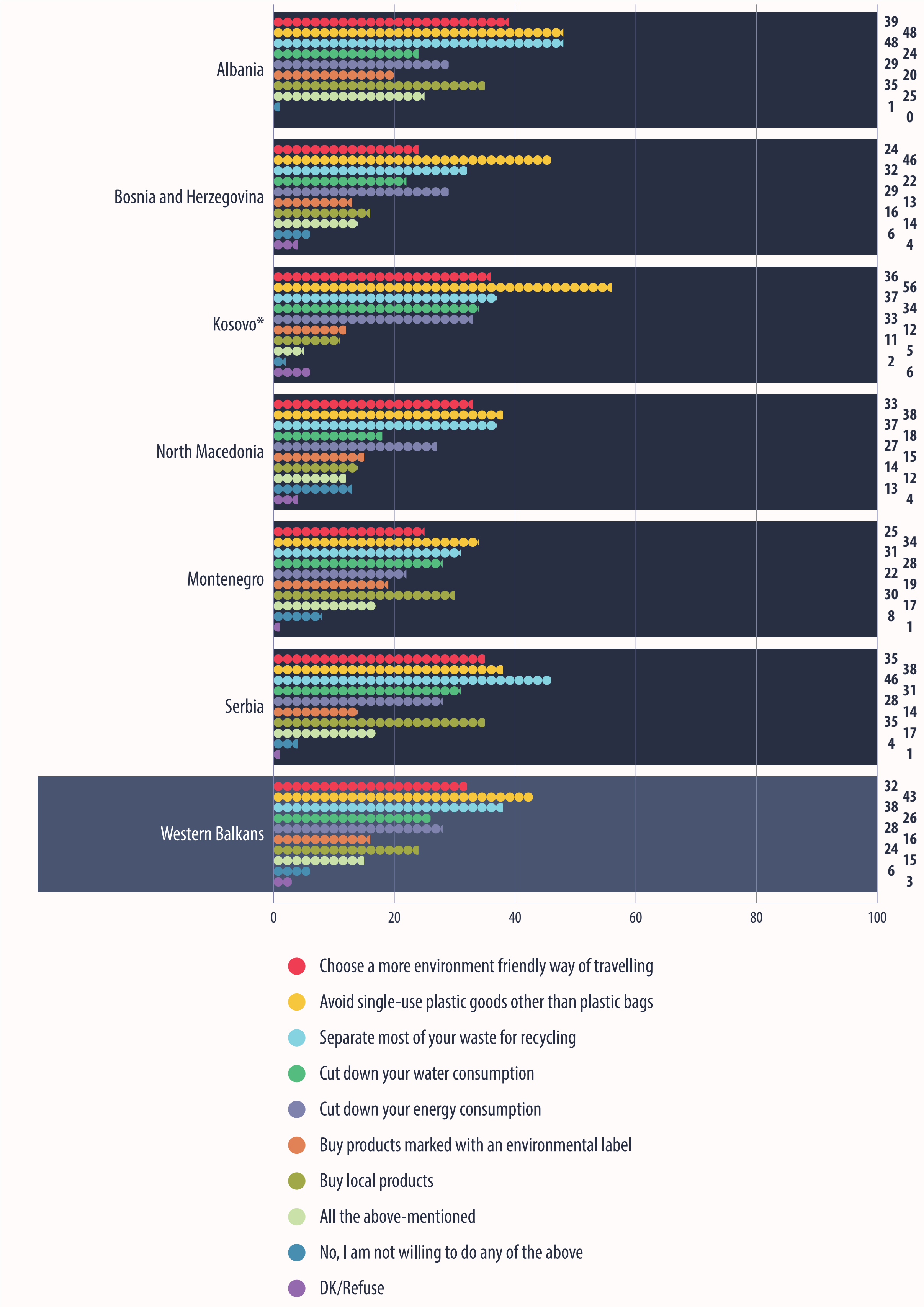
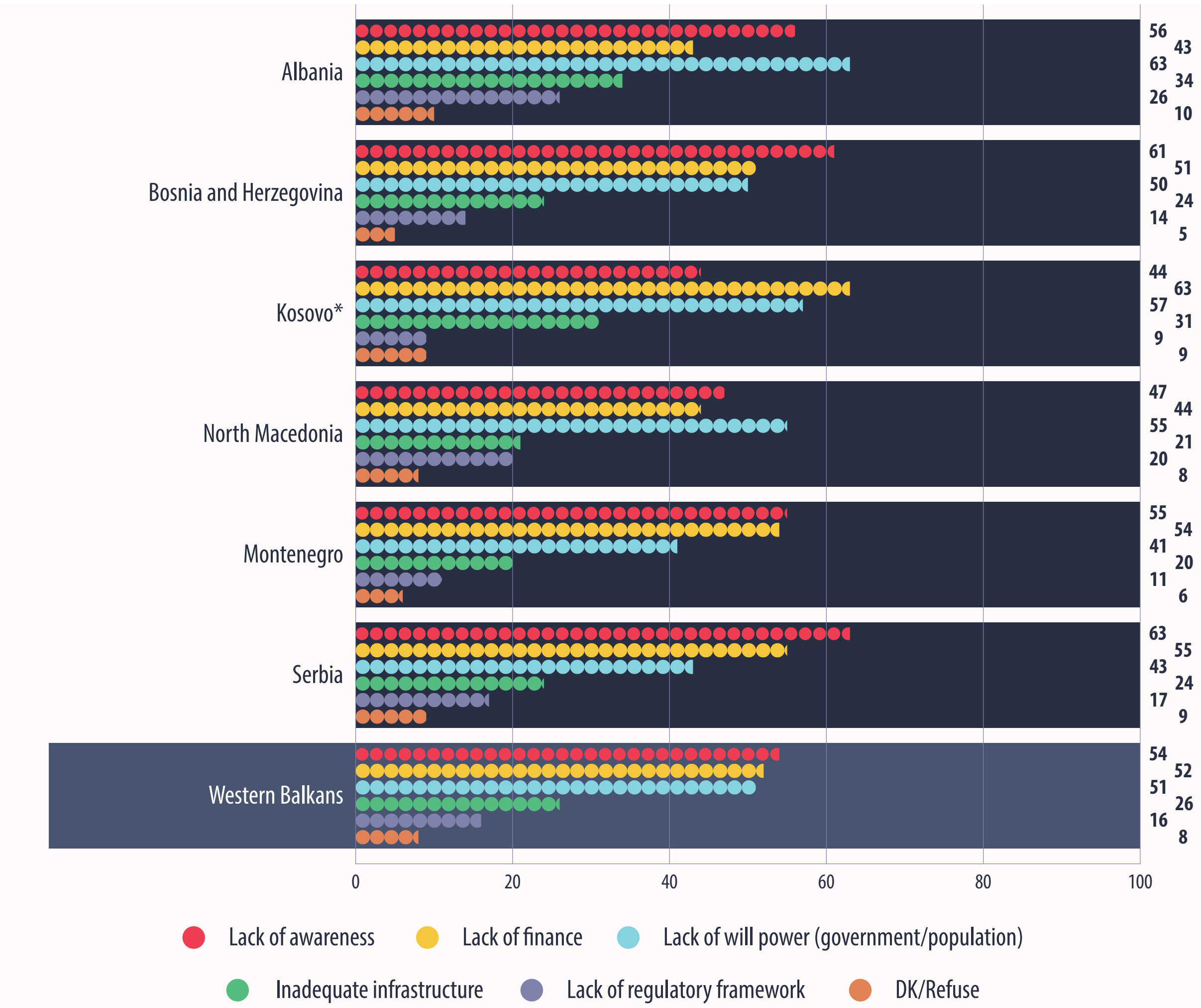


Figure 62 explores perceptions regarding the obstacles to making the green transition in the economies of the region. Three are the greatest barriers according to respondents from the WB: lack of awareness in the region (54%), lack of financial capacities (52%), and lack of will power by decision-makers and population (51%). Inadequate infrastructure and lack of regulatory framework are also selected, but at minor frequency than the above (26% and 16%, respectively). Respondents from Serbia and Bosnia and Herzegovina point out most to lack of awareness (63% and 61%, respectively), while lack of finance is the major obstacle for respondents from Kosovo* (63%). The lack of will power is mostly mentioned by respondents from Albania, followed by Kosovo* (57%).

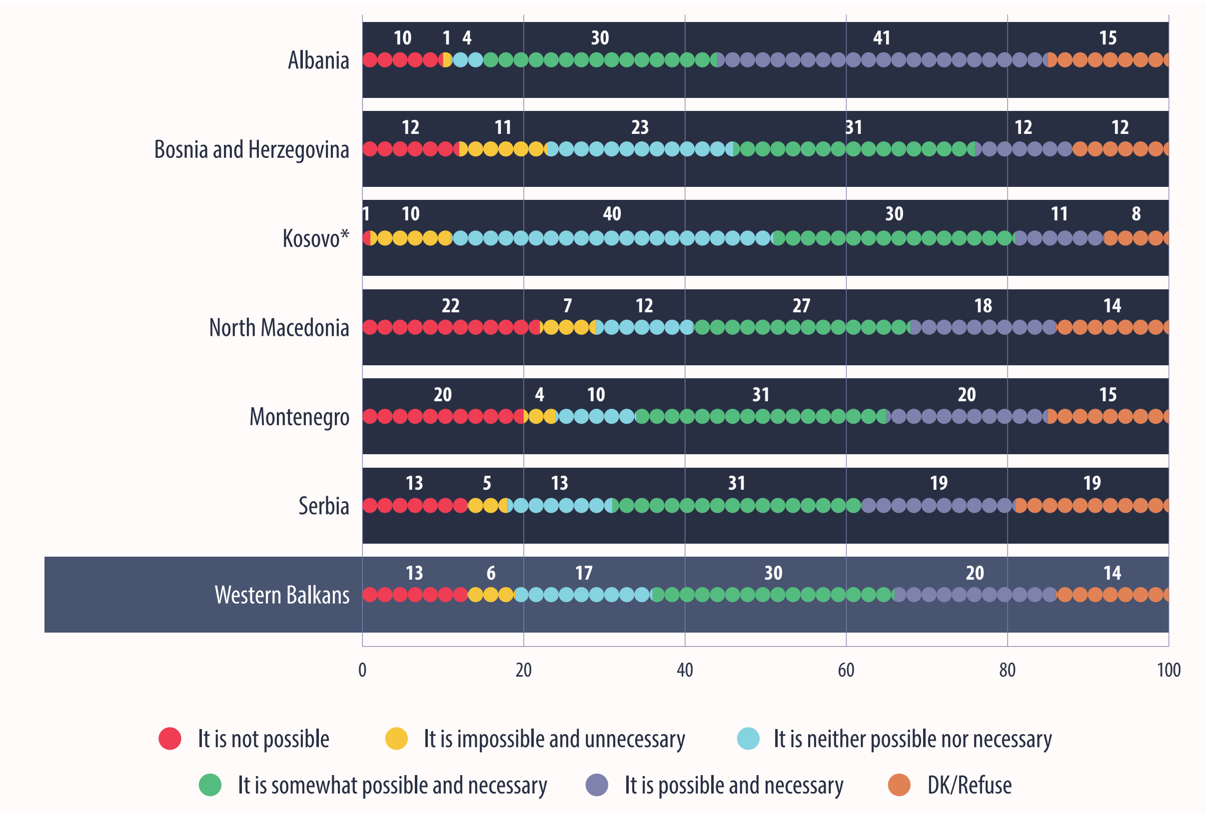
Building upon CRM Action Plan Regional Industrial Area's actions, RCC efforts to bring green and circular economy stakeholders together through regional stakeholder platforms and networks reflect on the need to raise awareness on the green transition and advocate for more financing opportunities to enter this transition.

Figure 62: What do you perceive to be the greatest barrier(s) to your economy in making the green transition?
(All respondents, n=6027, multiple answers, share of total, %)



The 2050 objective on carbon-neutrality is the subject of Figure 63. Half of the respondents from the region believe that meeting this objective is possible and necessary or somewhat so. Only 13% thinks it is not possible, while another 6% considers that it is not even necessary. A large part of economies in the region are dependent on coal and other fossil fuels for their main sectors, therefore this encouraging optimism might be due to lack of information and awareness. More than 90% of the energy sector in Albania depends on hydropower plants, therefore, it is to be expected that respondents from Albania consider the 2050 objective feasible, more than the other respondents (71%). On the other hand, respondents from Kosovo* are the least supportive of the idea that the objective can be implemented (41%), with another 40% who are neutral to the question. As a reminder, Kosovo* is in the exact opposite situation of Albania, with more than 90% of its energy depending on coal.

Figure 63: Do you think that your economy can fulfil its commitment towards reaching the 2050 objective on carbon-neutrality?
(All respondents, N=6027, single answer, scale from 1 to 5, share of total, %)



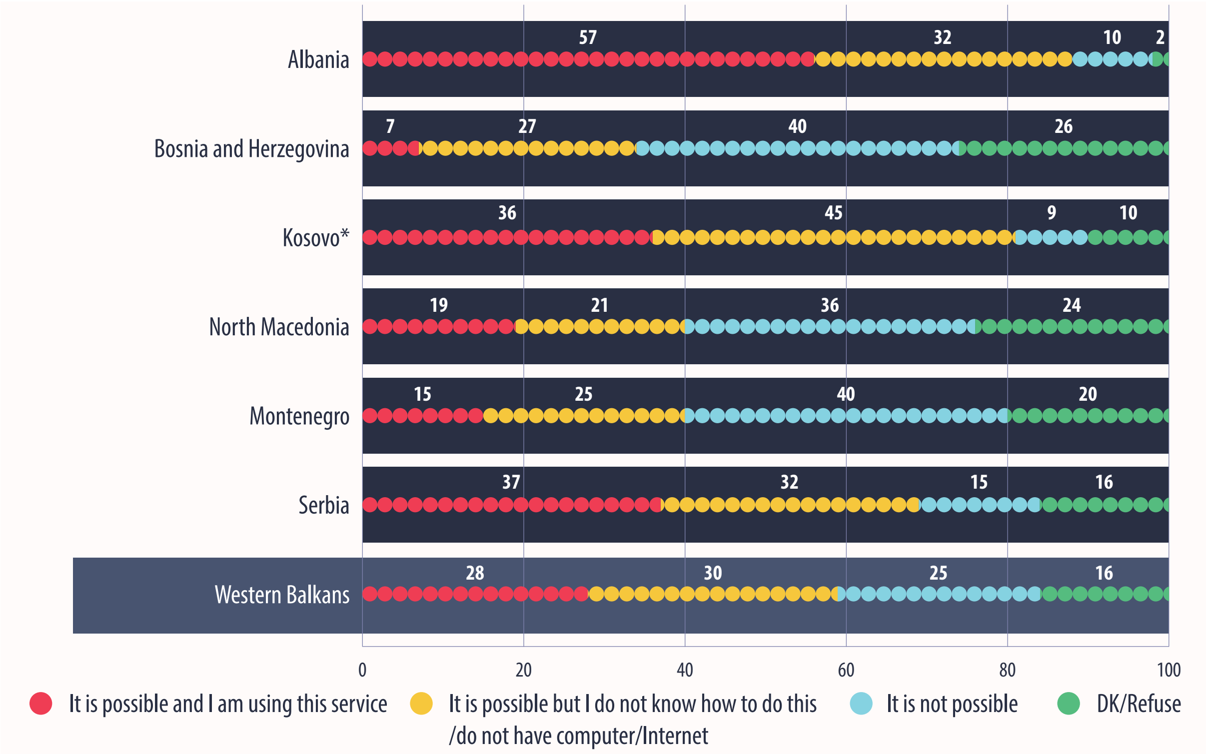
PERCEPTIONS ON PUBLIC INSTITUTIONS AND SERVICES

Public services, with the aid of digitalisation projects and agendas, have constantly improved in the region. The Balkan Barometer has been able to capture these changes in respondents' perceptions as well. When it comes to some basic services, such as getting personal documents online, the region appears quite divided. About 28% of respondents from the region claim to use this type of services, which is 2 points higher than in 2022. Meanwhile, 30% (8 points more than the last year) confirm the existence of such services in their economy but they are not able to use them. Almost a quarter of them claim that it is not possible to use such services in their economy.

At the economy level, respondents from Albania are the most confident regarding the use of basic online services in their economy, with 57% of them confirming their use (same as in 2022). Another 32% confirms availability of such services, but claims they are not able to use them. Therefore, in total 89% of respondents from Albania state that it is possible to receive these services online in their economy. The e-government platform in Albania has undergone major developments in the recent years and more than 1200 public services are accessible online. Respondents from Kosovo* and Serbia follow next after Albania in terms of highest shares of persons claiming the use of public online services. About 81% in Kosovo* declare that the online services are functional (25 points more than in 2022), although only 36% is using them. In Serbia, 69% confirm the availability of online public services for basic needs (same as last year), with 37% using them.

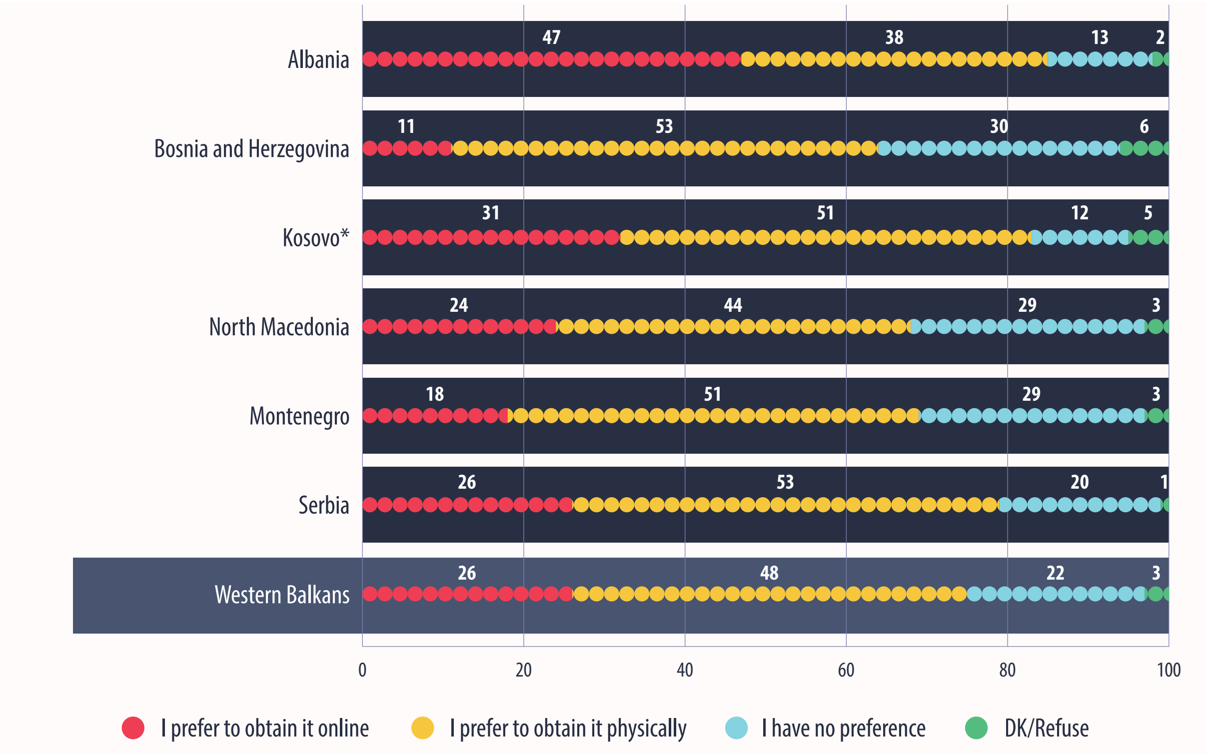
Respondents from the other three economies state in large shares that these services are not available online. More specifically, 40% in Bosnia and Herzegovina claim that it is not possible to get personal documents online (14 points less than last year), followed by 40% in Montenegro (7 points less than last year), and 36% in North Macedonia. However, almost the same share of respondents claim that these services exist and are available in their economy (34% in Bosnia and Herzegovina, 40% in Montenegro, and 40% in North Macedonia). These contradictory responses might suggest a lack of awareness and information in some groups of respondents.

Figure 64: Is it possible to get your personal documents (birth certificate, citizenship, etc.) or any other personal document online?
(All respondents, N=6027, single answer, share of total, %)



Following up on the previous question regarding online services, Figure 65 tries to capture attitudes and personal preferences of respondents towards these services. Almost half of respondents from the region (48%) prefer to obtain public services physically, showing a rather high level of scepticism regarding online services. Only 26% choose the online possibility, while another 22% has no preference. At the economy level, respondents from Albania are the ones preferring mostly the online services, with 47%, followed by those from Kosovo* at 31%. Percentages are quite low for the other economies, where physical approach for receiving public services seems to be the favourite option. About 53% of respondents from Bosnia and Herzegovina and Serbia prefer the traditional approach, followed by 51% from Montenegro and Kosovo*. Results on this question show a low level of familiarity and limited preference for digital tools.

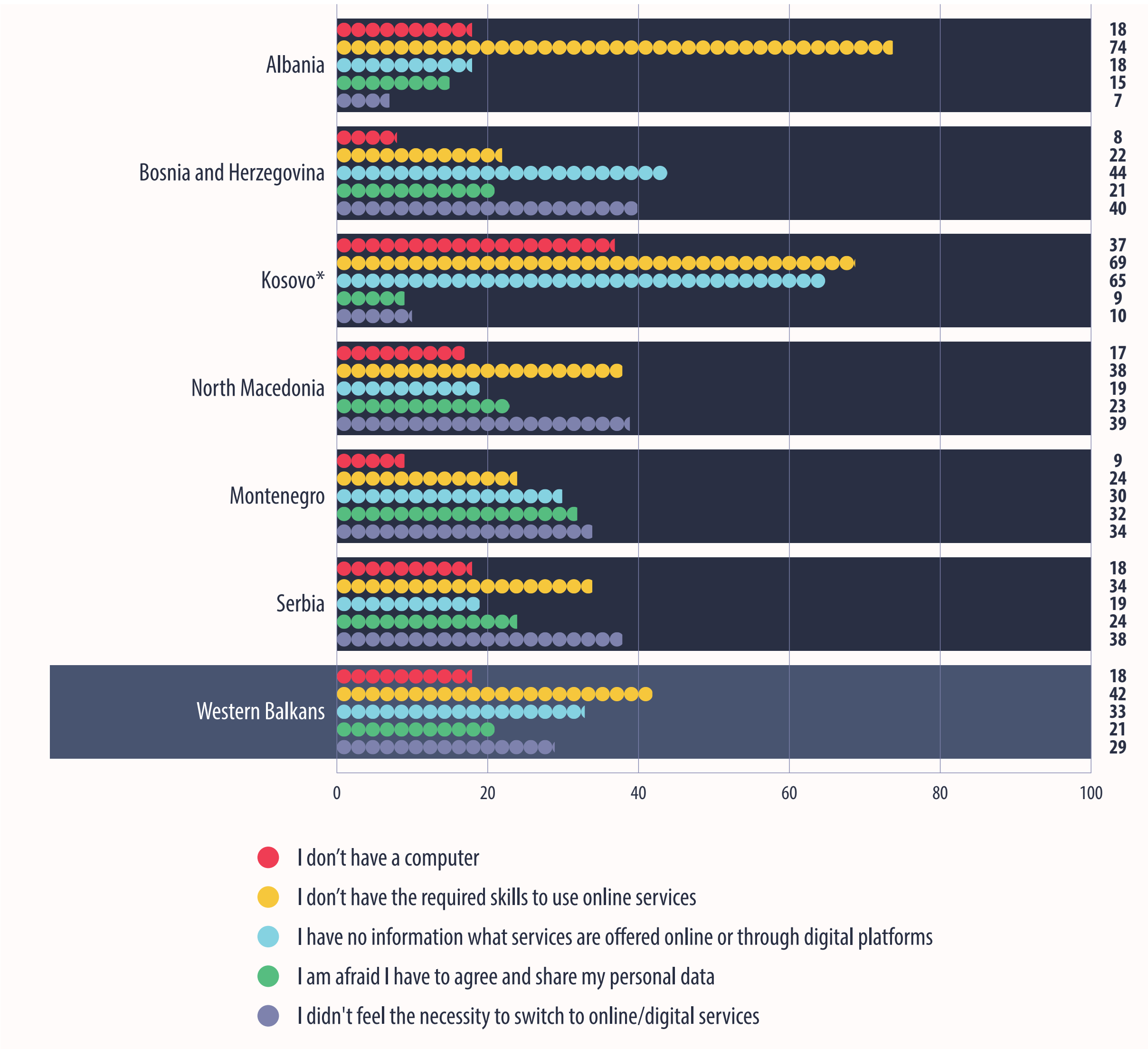
Figure 65: Do you prefer obtaining your personal or any other documents online or physically?
(All respondents, N=6027, single answer, share of total, %)



Exploring further the reasons why a majority of people in the region prefer to receive documents physically, Figure 66 lists the main results. Digital literacy is at the top of obstacles for 42% of respondents from the region, followed by lack of information (33%) and not feeling the necessity to switch to online (29%). Other reasons include the fear of sharing personal data (21%) and not having a computer (18%).

At the economy level, amongst those who do not use online services, respondents from Albania and Kosovo* do so mostly due to the lack of digital skills (74% and 69%, respectively). Respondents from Kosovo* are also the least informed regarding the services offered online (65%), followed by respondents from Bosnia and Herzegovina with 44%. Amongst those who did not feel the necessity to switch to online services, respondents from Bosnia and Herzegovina lead with 40%, followed by North Macedonia (39%) and Serbia (38%).

Figure 66: Why do you prefer to obtain personal or any other documents physically?
(Those who prefer to obtain document physically, n=2903, multiple answers, share of total, %)



The rule of law is one of the fundamental values of democracy and the WB is still struggling to effectively consolidate its implementation. In addition, in the EU accession process, in which all economies of the region are engaged, the rule of law is at the core of the enlargement process . In Figure 67, respondents are asked about their perceptions of the level of effective application and enforcement of the rule of law in their economy. About a quarter of respondents from the region (26%) do not agree with the proposed statement, dropping by 2 points from last year while another 35% also tend to disagree with the statement, increasing by 1 point from 2022. Only 6% are convinced that the rule of law is properly implemented, while in total 35% agree or tend to agree with the statement (same as last year).

In general, respondents from Albania and North Macedonia seem to be the most pessimistic on the subject, with 82% and 76%, respectively, claiming that they disagree or tend to disagree with the statement (increase of 5 points and 8 points compared to 2022). On the other hand, respondents from Kosovo* and Serbia register the highest support for the statement, believing that the rule of law is implemented effectively, with 62% and 50%, respectively (increased by 3 points and 6 points).

Figure 67: Do you agree that in your economy the rule of law is applied and enforced effectively?
(All respondents, N=6027, single answer, scale from 1 to 4, share of total, %)

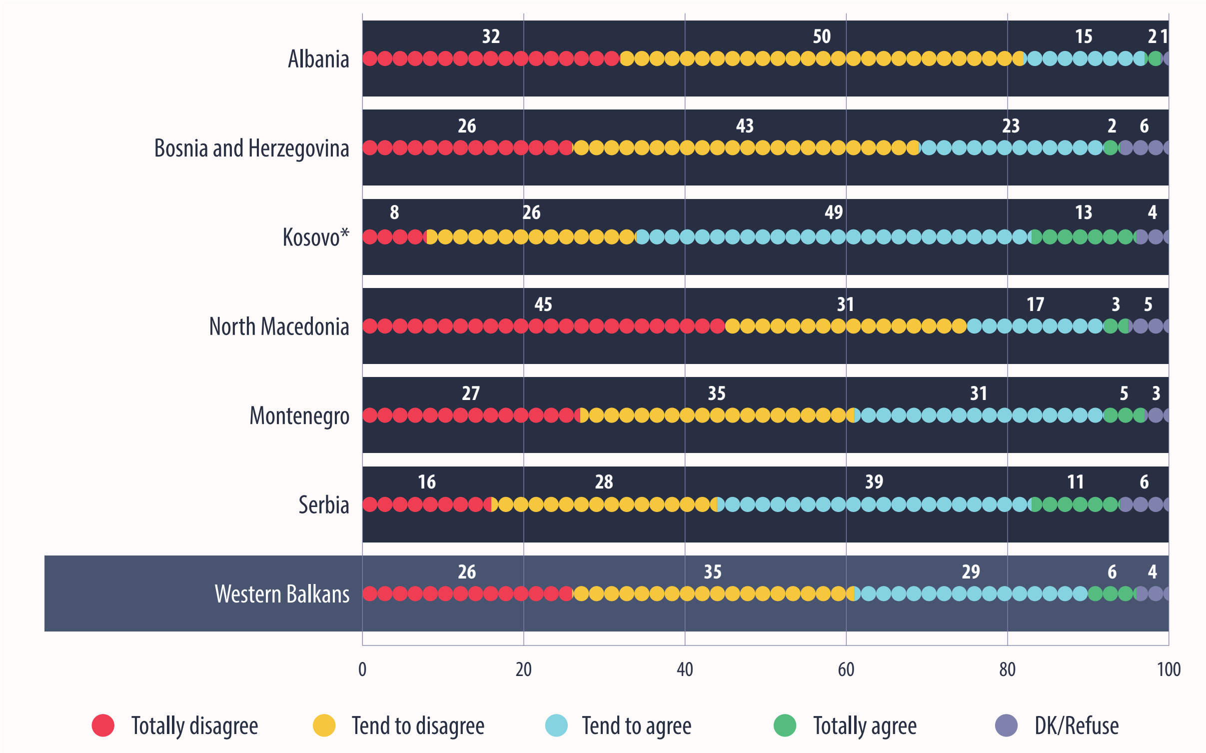
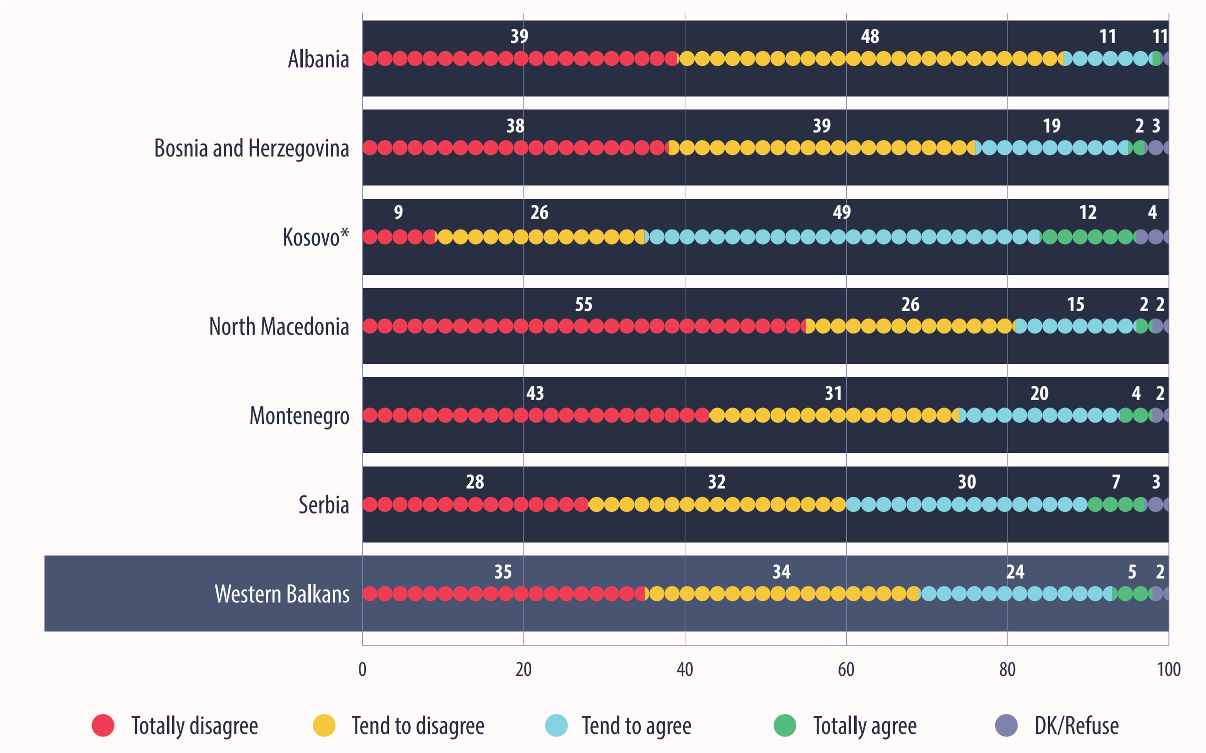


Figure 68 presents public perception regarding applicability of the law and equality before the law. About 69% of respondents tend to disagree or fully disagree with the claim of everyone being equally treated by the law in their economy (same as in 2022). Overall, 29% of them tend to believe or fully believe that the law is applied equally to everyone in their economy (presenting no changes from last year). Respondents from Kosovo* are the happiest with how the law is applied in their economy, with 61% overall supporting the statement (4 points more than in 2022). Respondents from Albania are on the other end of the spectrum, with 87% claiming that they tend to think or are fully certain that law is not applied equally in Albania (5 points more than last year). Responses from the other economies are in-between the above percentages, with Serbia showing more agreement with the statement than the other three (37% tend to agree or fully agree with the statement, with 3 points increase from 2022).

Figure 68: Do you agree that in your economy the law is applied to everyone equally?
(All respondents, N=6027, single answer, scale from 1 to 4, share of total, %)



As Figure 69 shows, political parties are the least trusted in the region, with 39% expressing total distrust and another 36% tending not to trust. Though generally all institutions are considered at similarly low levels of trust, the military is doing slightly better than all the rest, with overall 54% of respondents trusting or tending to trust them. Police follows in the second place with 45% of general trust.

Figure 69: How much trust do you have in certain institutions? (Results for the Western Balkans region)
(All respondents, N=6027, single answer, scale from 1 to 4, share of total %)

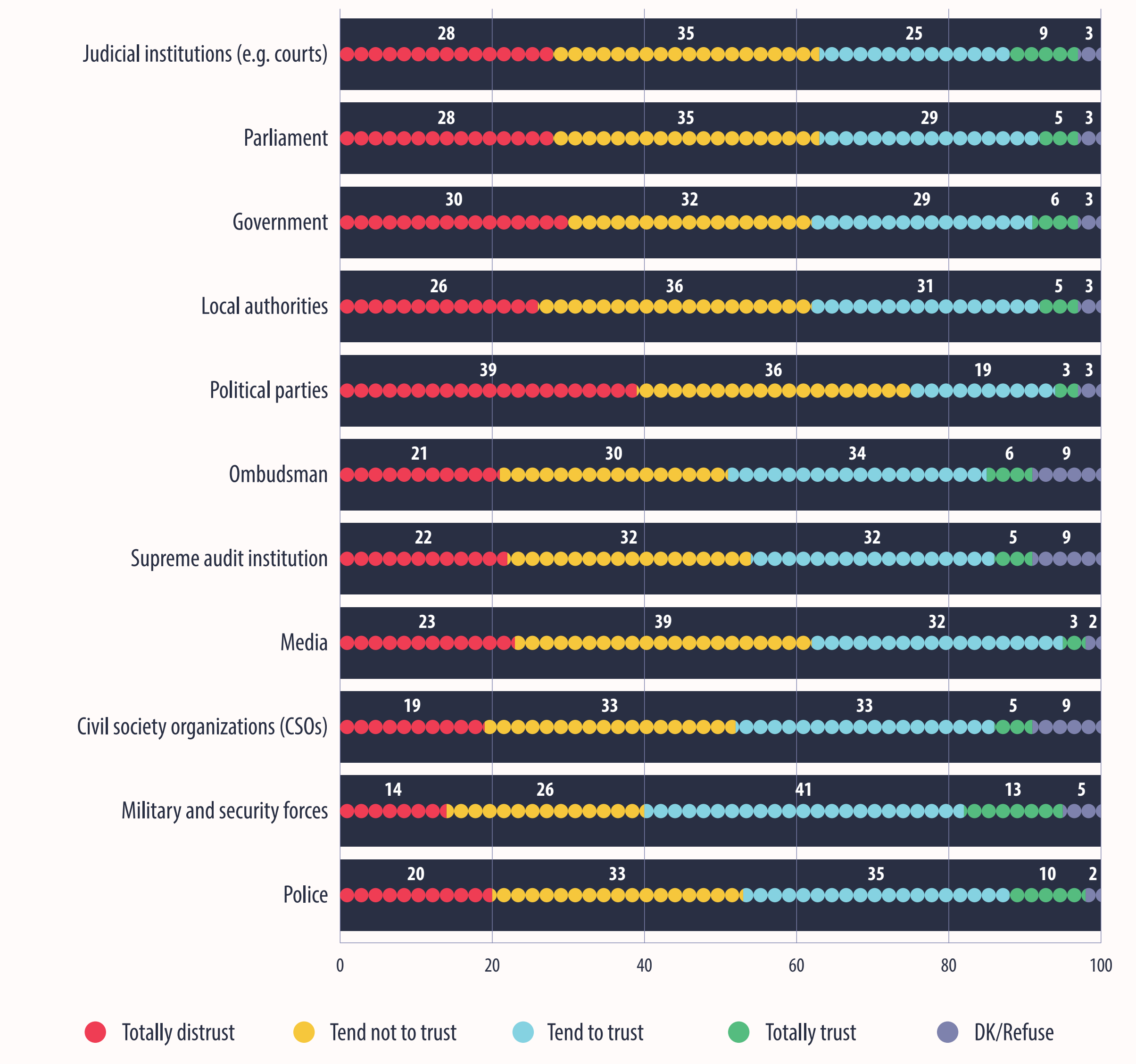
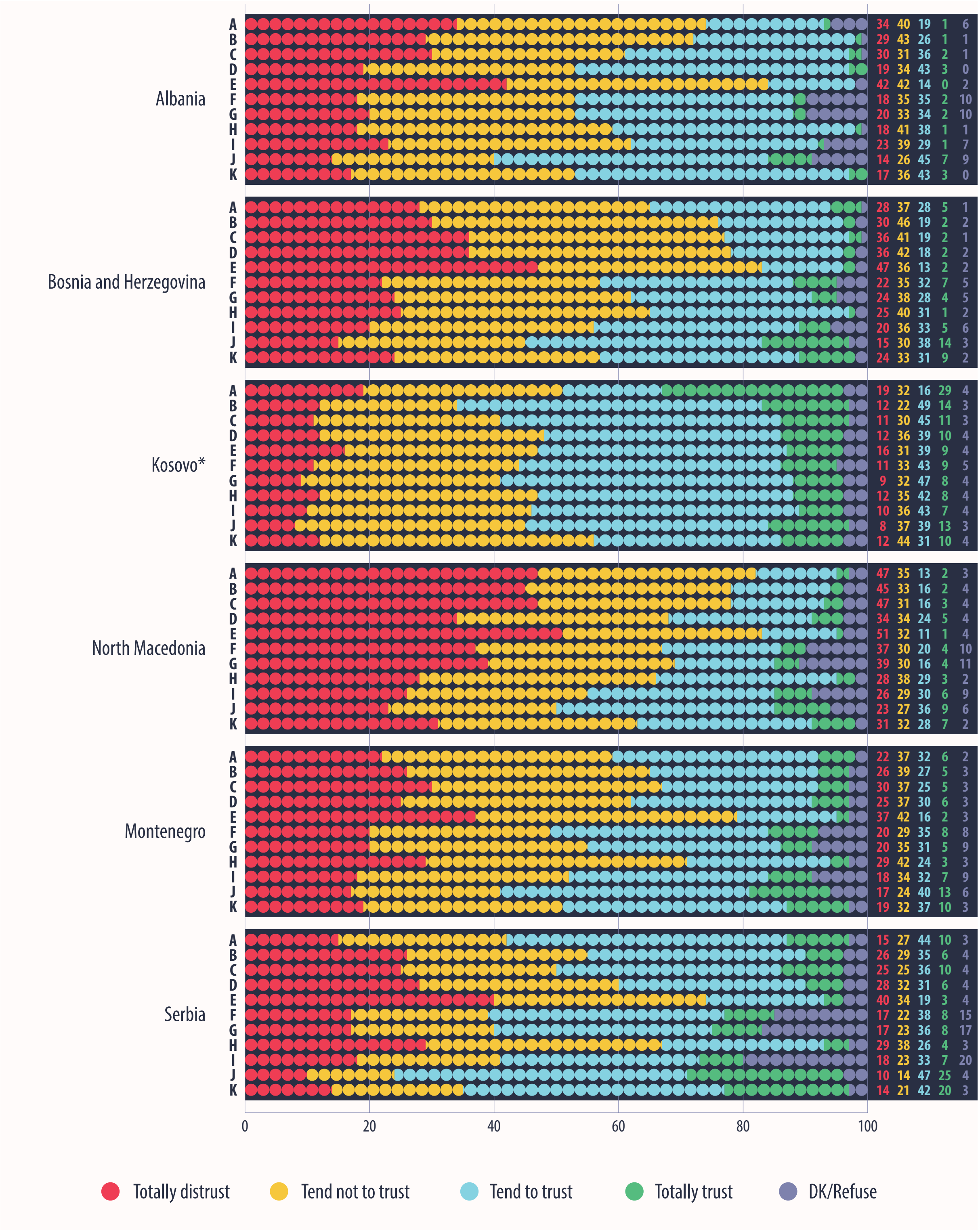


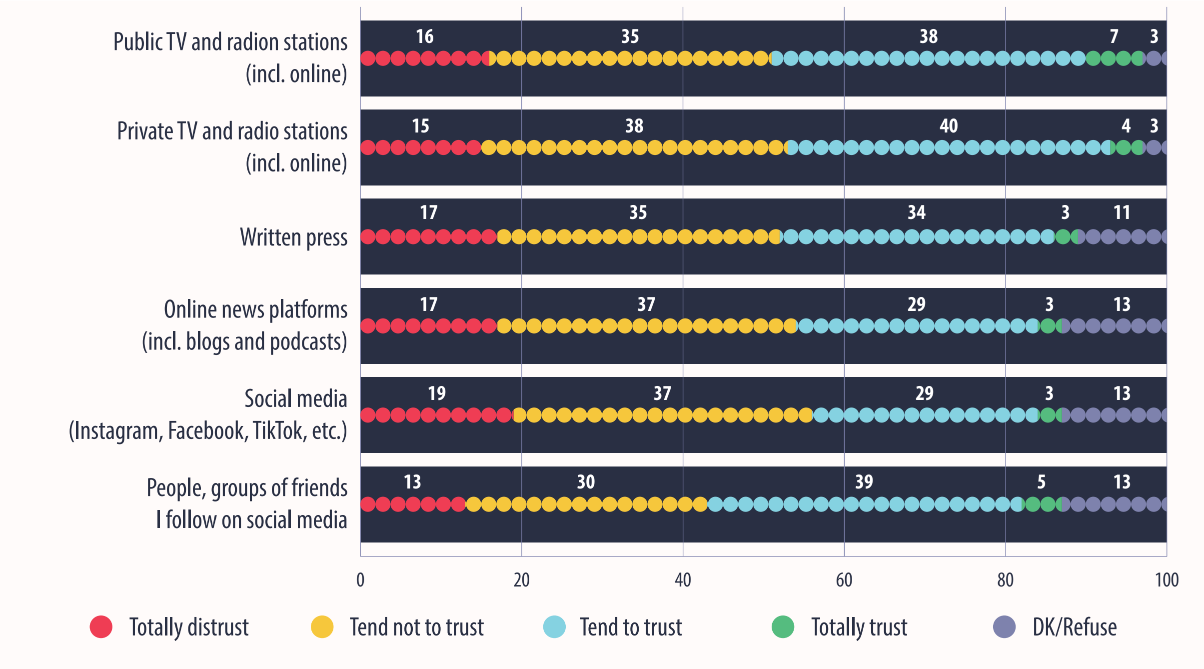
Figure 70 explores further trust in institutions at the economy level. As a general observation, mistrust is quite high in North Macedonia and Bosnia and Herzegovina, while respondents from Kosovo* have the highest trust. Courts are mostly mistrusted in North Macedonia with an overall 82% of share (10 points more than in 2022), while they are mostly trusted in Kosovo* with 45% of positive response (15 points less than last year). The Parliament is also least trusted in North Macedonia with 78% (increased by 9 points) and trusted most in Kosovo* with 63% (2 points less than last year). Three quarters (77%) of respondents from Bosnia and Herzegovina (6 points more than in 2022) tend to distrust the government, totally or partially. On the other hand, respondents from Kosovo* are the ones to trust more, with 56% (12 points less than last year). Political parties are not trusted most in Albania (84%) followed closely by Bosnia and Herzegovina (83%). The media is not trusted in Montenegro (71%) and Serbia (67%) and is mostly trusted in Kosovo* at 50%.

Figure 70: How much trust do you have in certain institutions? (Results by economies)
A - Courts and judiciary; **B** – Parliament; **C** – Government; **D** – Local authorities; **E** – Political parties; **F** – Ombudsman; **G** - Supreme audit institution; **H** – Media; **I** - Civil society organisations (CSOs); **J** - Military and security forces; **K** - Police
(All respondents, N=6027, single answer, scale from 1 to 4, share of total %)



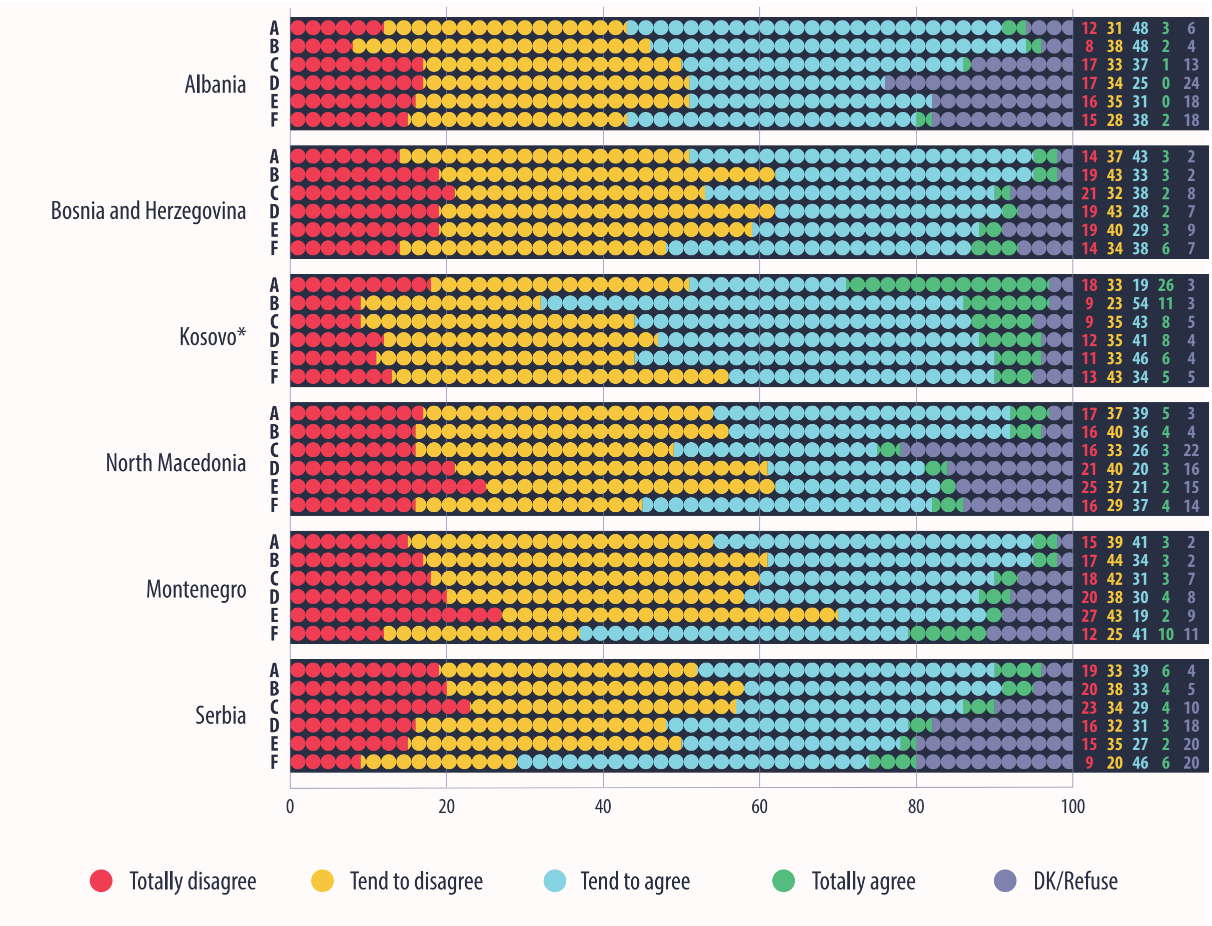
Trusted sources of information are key to a healthy democratic environment and Figure 72 tries to grasp perceptions of respondents regarding the reliability of information channels and sources in the region. There is an equally widespread level of mistrust amongst the different proposed sources, with the minor exception of people and groups of friends followed on social media. This latter channel receives a 44% share of overall trust, although almost the same percentage of respondents do not trust them (43%). Public TV is the most trusted source (45%) though with a minor difference compared to other sources.

Figure 71: How much trust do you have in each of the following to be a reliable source of news and information? (Results for the Western Balkans region)
(All respondents, N=6027, single answer, scale from 1 to 4, share of total %)



Results by economy show very similar attitudes between economies, with a few exceptions. Trust is quite high for private TV in Kosovo* with an overall share of 65%. In Serbia and Montenegro, about 52% and 51%, respectively, trust other people or friends on social media, which are the highest shares in the region. In Montenegro we also find the least trusted source, which is social media, at 70%. Written press is most popular in Kosovo* (51%). Private TVs are not trusted mainly in Bosnia and Herzegovina (62%) and Montenegro (61%).

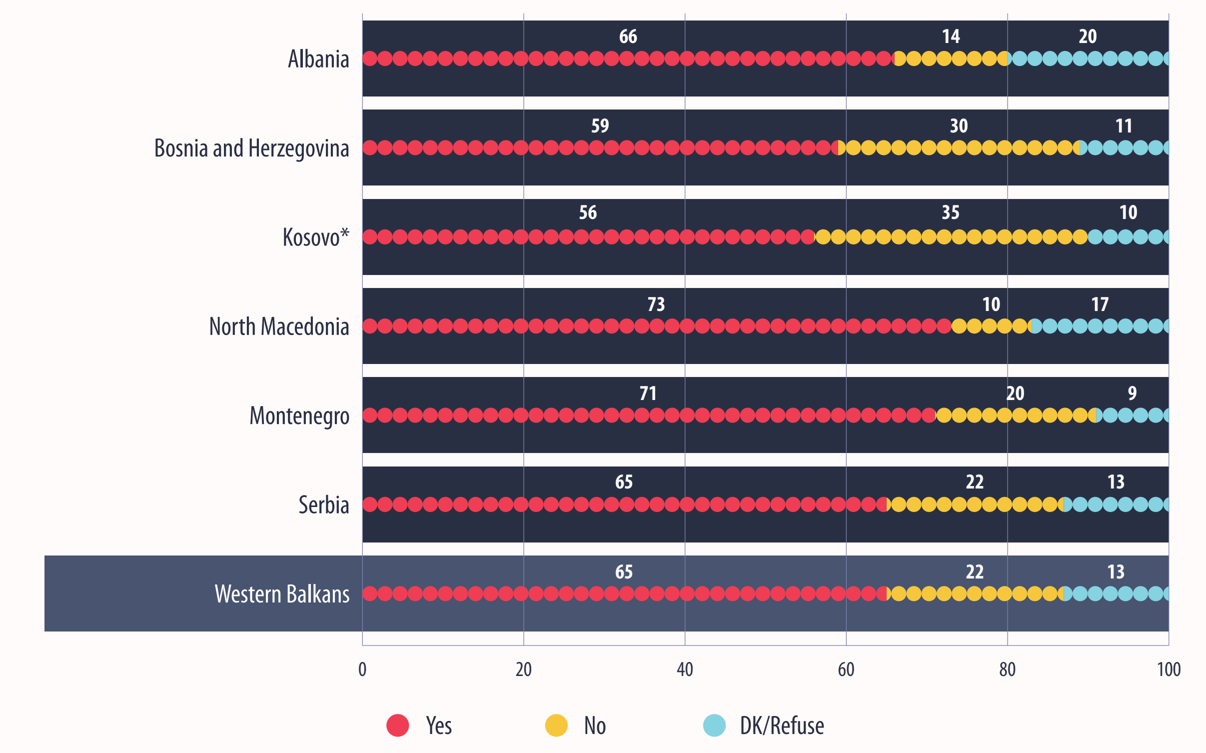
Figure 72: How much trust do you have in each of the following to be a reliable source of news and information? (Results by economies)
A - Public TV and radio stations (incl. online); **B** - Private TV and radio stations (incl. online); **C** - Written press; **D** - Online news platforms (incl. blogs and podcasts); **E** - Social media (Instagram, Facebook, TikTok, etc.); **F** - People, groups of friends I follow on social media
(All respondents, N=6027, single answer, scale from 1 to 4, share of total %)



Respondents from the WB express concern regarding the spread of fake news in their economies, with 65% claiming that it increased in the past 12 months. Shares of respondents range from 56% in the case of Kosovo* up to 73% in North Macedonia, followed by Montenegro in the second place (71%). The region has been subject to a variety of campaigns for spreading fake news and disinformation, especially by foreign entities and groups.[6] The impact that these phenomena could have on public opinion and democratic processes can be considerable, therefore, a high level of awareness (as the survey shows) is a good step towards establishing a proper defence against them.

6 Unkić, H. (2023) Fighting a Flood of Disinformation in the Western Balkans. South East European Network for Professionalization of Media (SEENPM).
Available at: https://seenpm.org/fighting-a-flood-of-disinformation-in-the-western-balkans/

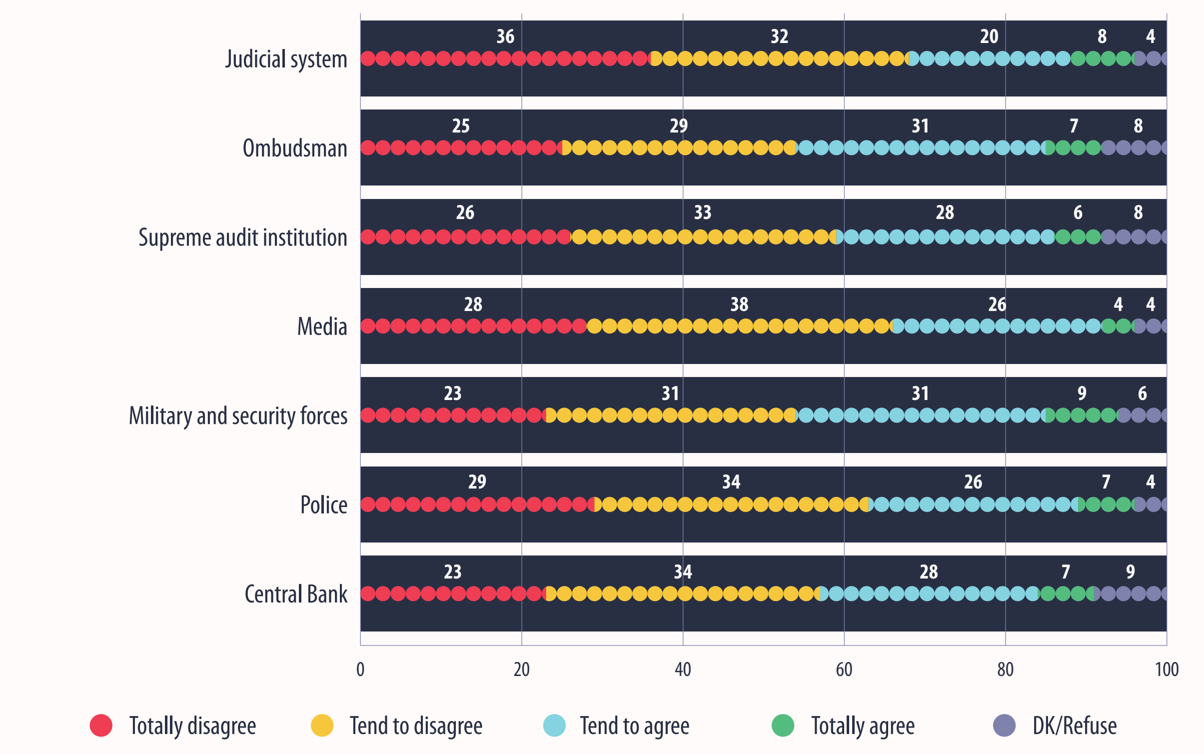
Figure 73: In your view, has there been increase in your economy of various fake news and disinformation in the past 12 months?
(All respondents, N=6027, single answer, share of total, %)



Independent institutions are essential to a well-functioning democracy and rule of law. Figure 74 collects perceptions of respondents from the WB regarding the independence of institutions from political influence. The judicial system is considered the most problematic in terms of independence from politics. Overall, 68% of respondents from the region do not fully agree or tend to disagree with the statement on independence. This share registers a total of 2 points increase relative to the last year. This finding reflects the multifaceted challenges that the judiciaries across the region are facing, and the need for further consolidation of judicial reforms.

Media follows in the second place as the least independent institution from political influence, with 64% disagreeing or tending to disagree with the statement and only 30% agreeing (3 points less than last year). A slightly better perception is recorded for the military services and the ombudsman. About 40% of respondents agree or tend to agree that the military in their economy is independent from politics, and 38% think the same regarding the Ombudsman (same as last year). Both institutions face lower levels of disagreement regarding the statement, with overall shares of 54% each.

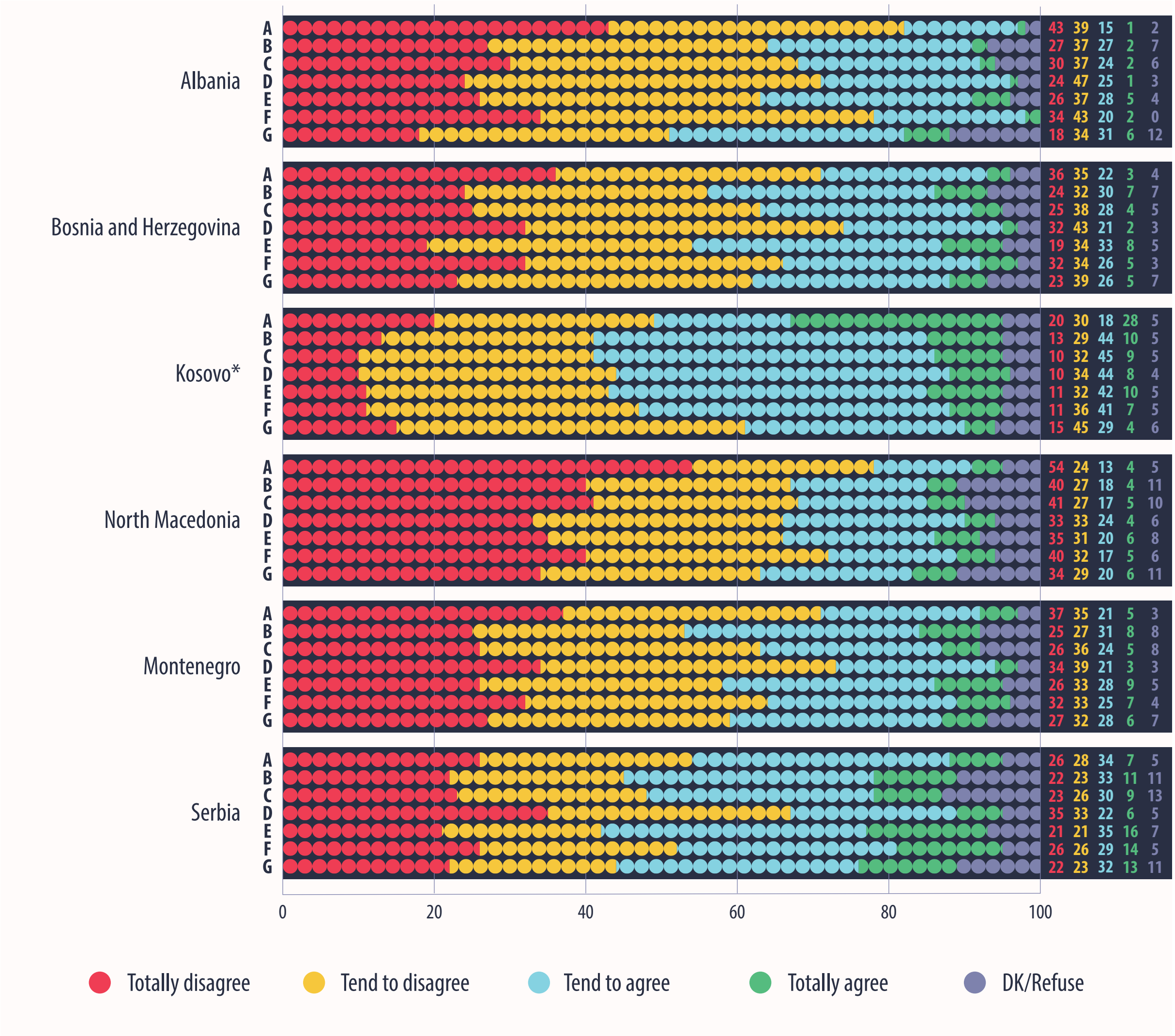
Figure 74: Do you agree that the following institutions are independent of political influence? (Results for the Western Balkans region)
(All respondents, N=6027, single answer, scale from 1 to 4, share of total %)



At the economy level, Figure 75 shows that while most of the economies present similar attitudes towards independence of institutions, respondents from Kosovo* have a different approach. In Kosovo*, the Central Bank is considered the institution least independent from political influence, with 60% supporting this claim, and only 33% thinking the contrary. On the other hand, the judiciary system scores best in Kosovo* out of all the region, with half of respondents stating they do not agree or tend to disagree with its being independent (with the increase of 11 points relative to the last year). Trust in the independence of judiciary system is worst in Albania and North Macedonia, with 82% and 78%, respectively, disagreeing with the statement. While in North Macedonia this is the same share as in 2022, in Albania there is an increase by 4 points. Police is also considered least independent in Albania (77%) and North Macedonia (72%), while it is trusted as independent mostly in Kosovo* (48%) and in Serbia (43%).

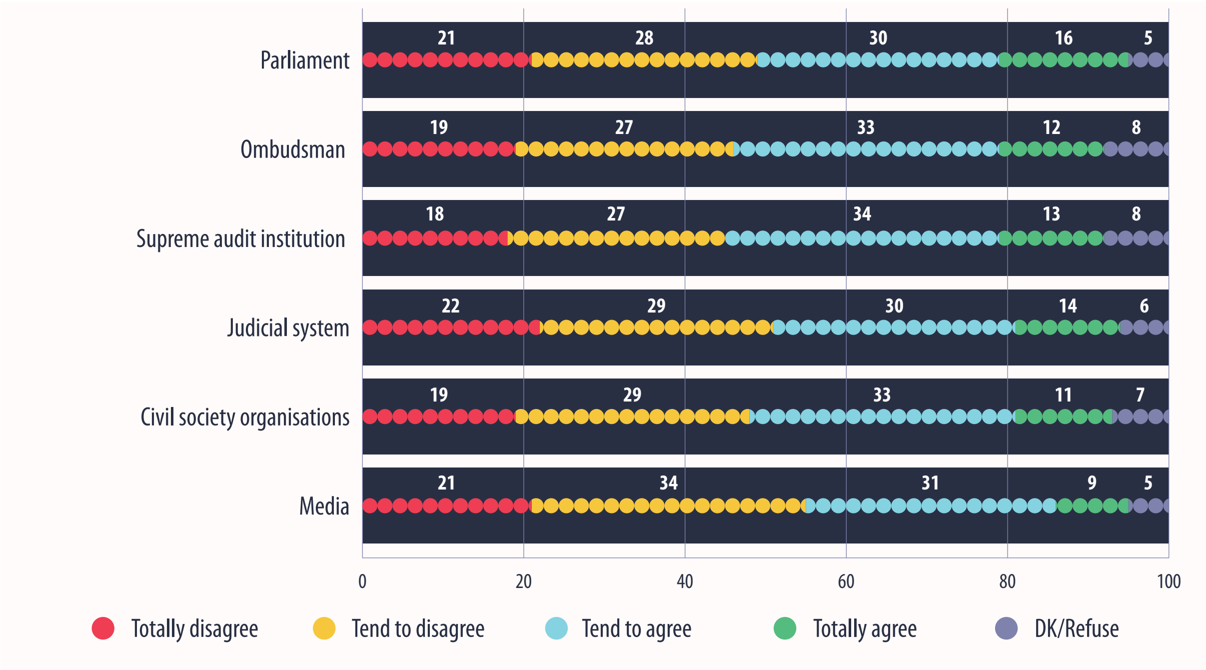
Media is considered heavily influenced by politics across economies, except for Kosovo* where a slight majority (52%) considers it not influenced by politics. In Montenegro and Serbia, media is considered the institution most influenced by politics, with 73% (highest in the region) and 68%, respectively. In Montenegro, this share has increased by 11 points compared to 2022. Also, in Bosnia and Herzegovina (75%), Albania (71%), and North Macedonia (66), the largest part of respondents tend to disagree of fully disagree that media is independent from politics. In Albania, the perception of lack of independence of the media has increased by 11 points compared to 2022.

Figure 75: Do you agree that the following institutions are independent of political influence? (Results by economies)
A - Judicial system; **B** – Ombudsman; **C** - Supreme audit institution; **D** – Media; **E** – Military and security forces: **F**- Police; **G** – Central Bank
(All respondents, N=6027, single answer, scale from 1 to 4, share of total %)



Independent institutions are crucial for making the executives accountable to citizens, among other important functions. Figure 76 shows the level of trust that respondents from the region places in institutions for fulfilling this important function. As in previous figures, the judicial system and the media are considered the least effective in the region. About 55% of respondents do not agree or tend not to agree that media can effectively make the government accountable, with a share increase of 6 points from 2022. Judiciary system is considered ineffective in this regard by 51% of respondents. Though at quite similar levels as the above, the Supreme Audit and the Ombudsman are perceived slightly better, with only 45% and 46%, respectively, considering them as not very effective for scrutinising the government. Civil society organisations follow, with an overall share of 48% replying negatively to the question.

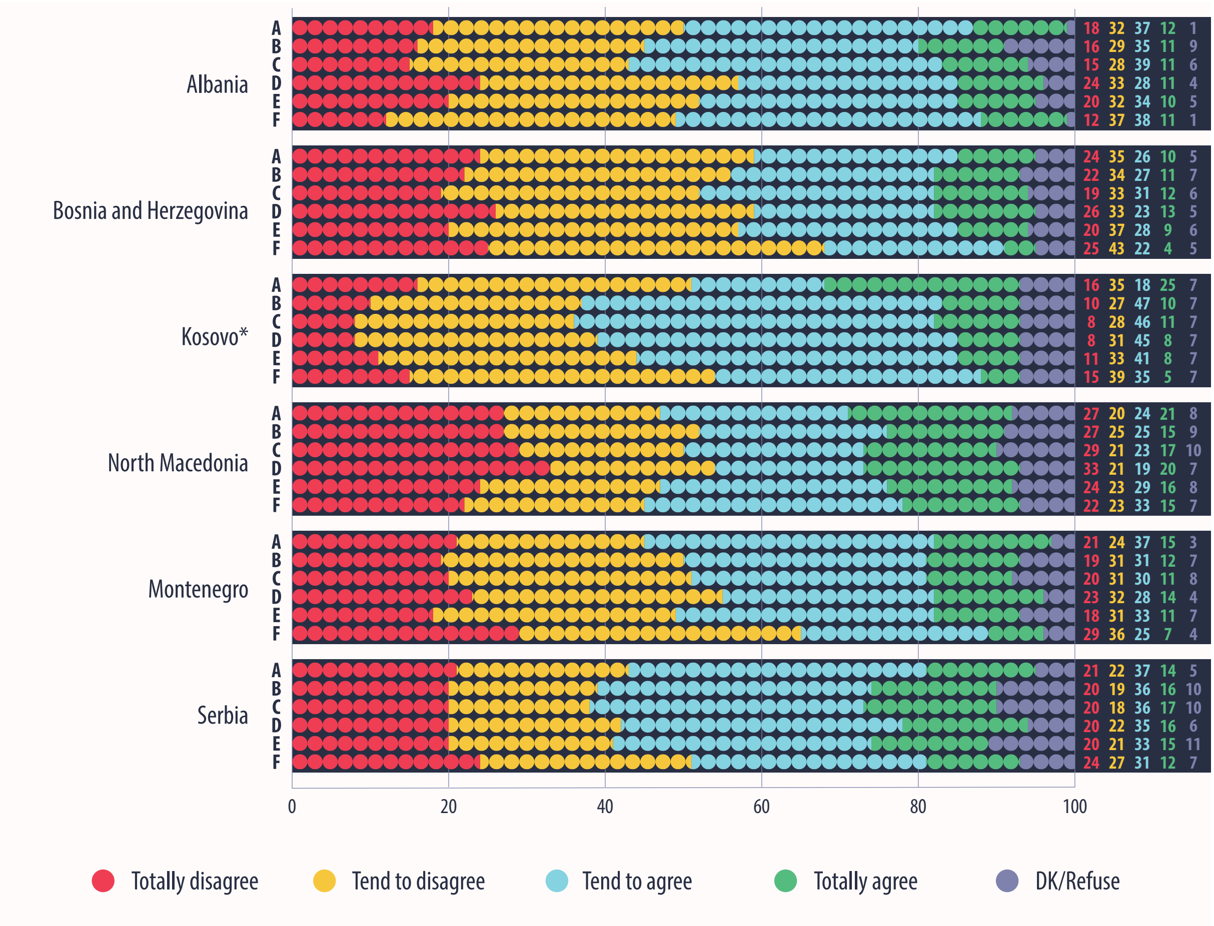
Figure 76: Do you agree that the following institutions can effectively scrutinise the government and make it accountable to citizens? (Results for the Western Balkans region)
(All respondents, N=6027, single answer, scale from 1 to 4, share of total %)



When unpacking Figure 76 at the economy level, institutions are perceived slightly better in Kosovo*, although they present similar attitudes across economies (Figure 79). Out of all institutions in the region, the least effective for scrutinising the government is considered the media in Bosnia and Herzegovina and Montenegro, with 68% and 65%, respectively, considering them (or tending to consider them) ineffective for making their governments accountable. Compared to 2022, this share in Bosnia and Herzegovina has experience a considerable increase by 19 points, and in Montenegro by 10 points.

The Ombudsman and the Supreme Audit are doing relatively well in the perceptions of respondents from Kosovo*, with 57% of share for each trusting that these bodies can scrutinise the government effectively. The Parliament is perceived as most effective in Montenegro and Serbia, with 52% and 51%, respectively, of those who tend to agree or fully agree with the results of this institution in scrutinising the government.

Figure 77: Do you agree that the following institutions can effectively scrutinise the government and make it accountable to citizens? (Results by economies) **A** – Parliament; **B** – Ombudsman; **C** - Supreme audit institution; **D** – Judicial system; **E** – Civil society organisations; **F** - Media
(All respondents, N=6027, single answer, scale from 1 to 4, share of total %)

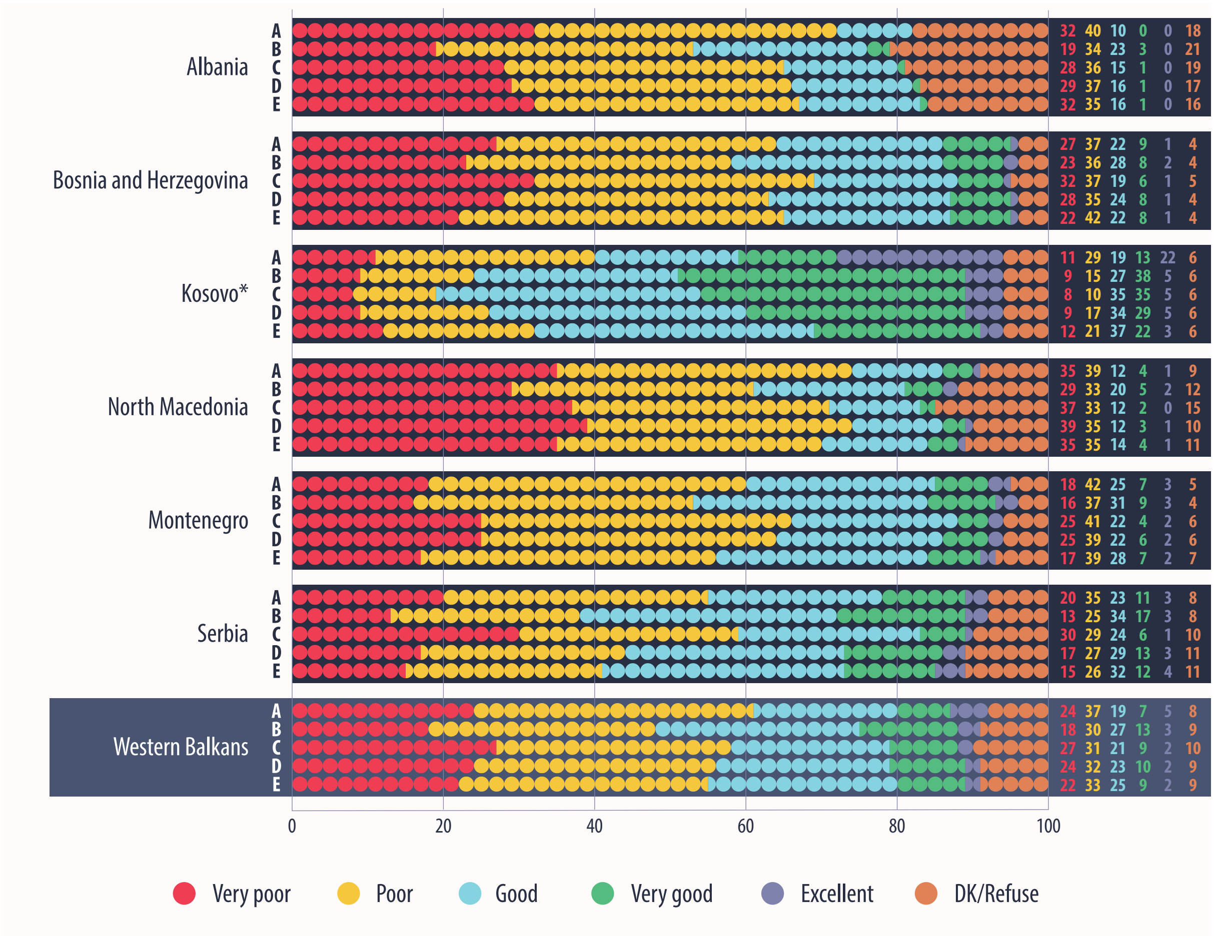


As the previous figures showed, the justice system is perceived poorly by respondents from the region, both in terms of independence from political influence and their ability to effectively make the government accountable. Figure 78 details the analysis further regarding the judiciary by asking respondents in each economy about several components related to this institution. As in other figures, Kosovo* is again an exception to the region, with a large part of respondents demonstrating most positive perception regarding the functioning of the judiciary in their economy. About 22% in Kosovo* consider the length of proceedings as excellent, while there is no one in Albania sharing this opinion for their own judiciary. Similar proportions are observed regarding the other components, when comparing Kosovo* to the other economies.

Length of proceedings is rated lowest in North Macedonia and Albania, where 74% and 72% of respondents, respectively, consider them as poor or very poor (up by 6 and 5 points, respectively). Costs of proceedings are also considered poor and very poor in North Macedonia with 70% of respondents (increased by 4 points compared to 2022), followed by Bosnia and Herzegovina with 69% rating them poor or very poor (3 points more than last year). Meanwhile, in Kosovo* the cost of proceedings are perceived positively by three quarters of respondents, overall.

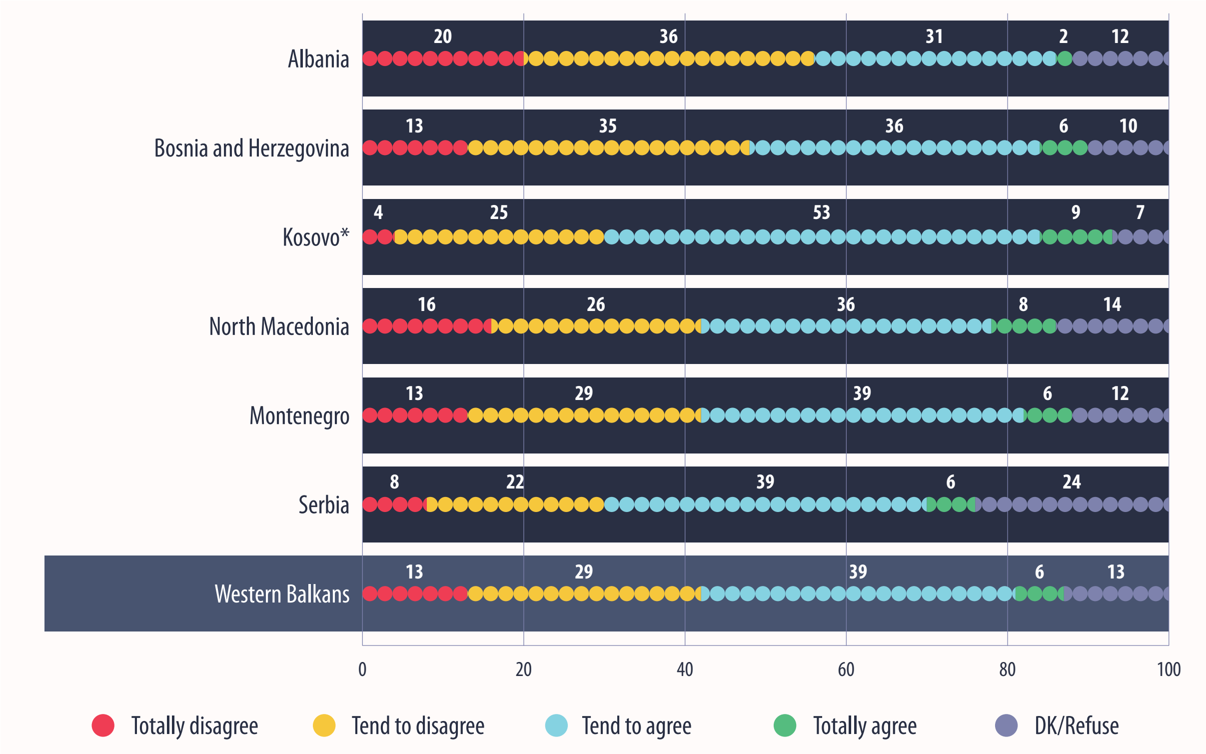
Also, for the execution of judgements, North Macedonia and Albania score the highest levels of dissatisfaction, with overall shares of 74% and 66%, respectively, showing an increase of 9 and 4 points from last year. Both these economies register the highest dissatisfaction with the transparency in the justice system, with North Macedonia at 70% and Albania at 67% of respondents (increased by 6 and 2 points, respectively).

Figure 78: How would you rate the justice system in terms of: **A** - Length of proceedings; **B** – Accessibility; **C** – Costs of proceedings; **D** – Execution of judgements; **E** - Transparency
(All respondents, N=6027, single answer, scale from 1 to 5, share of total, %)



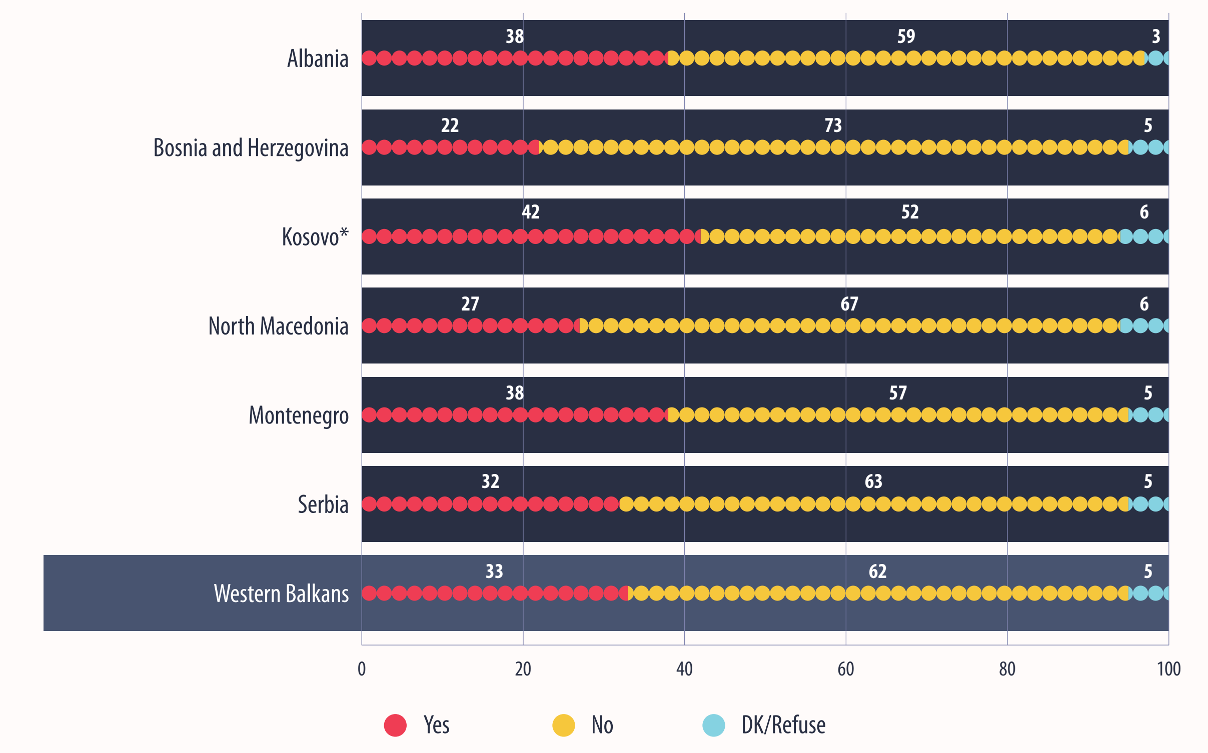
Although civil society organisations are perceived as slightly better than other stakeholders in the economies of the region, the trust and effectiveness that respondents associate with them can be improved further. In Figure 79 depicts how respondents consider CSOs in terms of effectiveness for providing services for communities. At the regional level, around 45% agree or tend to agree with the proposed statement, against 42% that have doubts and do not share the same opinion. At economy level, there is a variety of attitudes and perceptions. About 62% of respondents from Kosovo* agree or tend to agree that CSOs can provide such services, while the lowest support for this statement is to be found amongst the respondents from Albania (33%). A majority of the latter (56%) is not convinced by such role for civil society organisations in their economy. This scepticism is followed by Bosnia and Herzegovina in the second place, with 48% of respondents doubting the effectiveness of such engagement from CSOs. On the other hand, similarly to Kosovo* responses, only 30% of those from Serbia do not agree or tend not to agree with supporting this role for civil society organisation and their effectiveness.

Figure 79: Do you agree that civil society organisations are providing effective services for the benefit of communities?
(All respondents, N=6027, single answer, scale from 1 to 4, share of total, %)



One third of respondents in the region have heard of the Regional Cooperation Council (RCC), while 62% have not. Figure 80 shows that Kosovo* respondents are more familiar with the RCC with 42%, followed by Albania and Montenegro with 38% each. Respondents from Bosnia and Herzegovina and North Macedonia are the ones less informed regarding the RCC, with only 22% and 27%, respectively. Despite the regional initiatives of the recent years undertaken by the RCC, almost three quarters of respondents from Bosnia and Herzegovina and two thirds from North Macedonia claim not to have heard about it before.

Figure 80: Have you heard of the Regional Cooperation Council (RCC)?
(All respondents, N=6027, single answer, share of total, %)

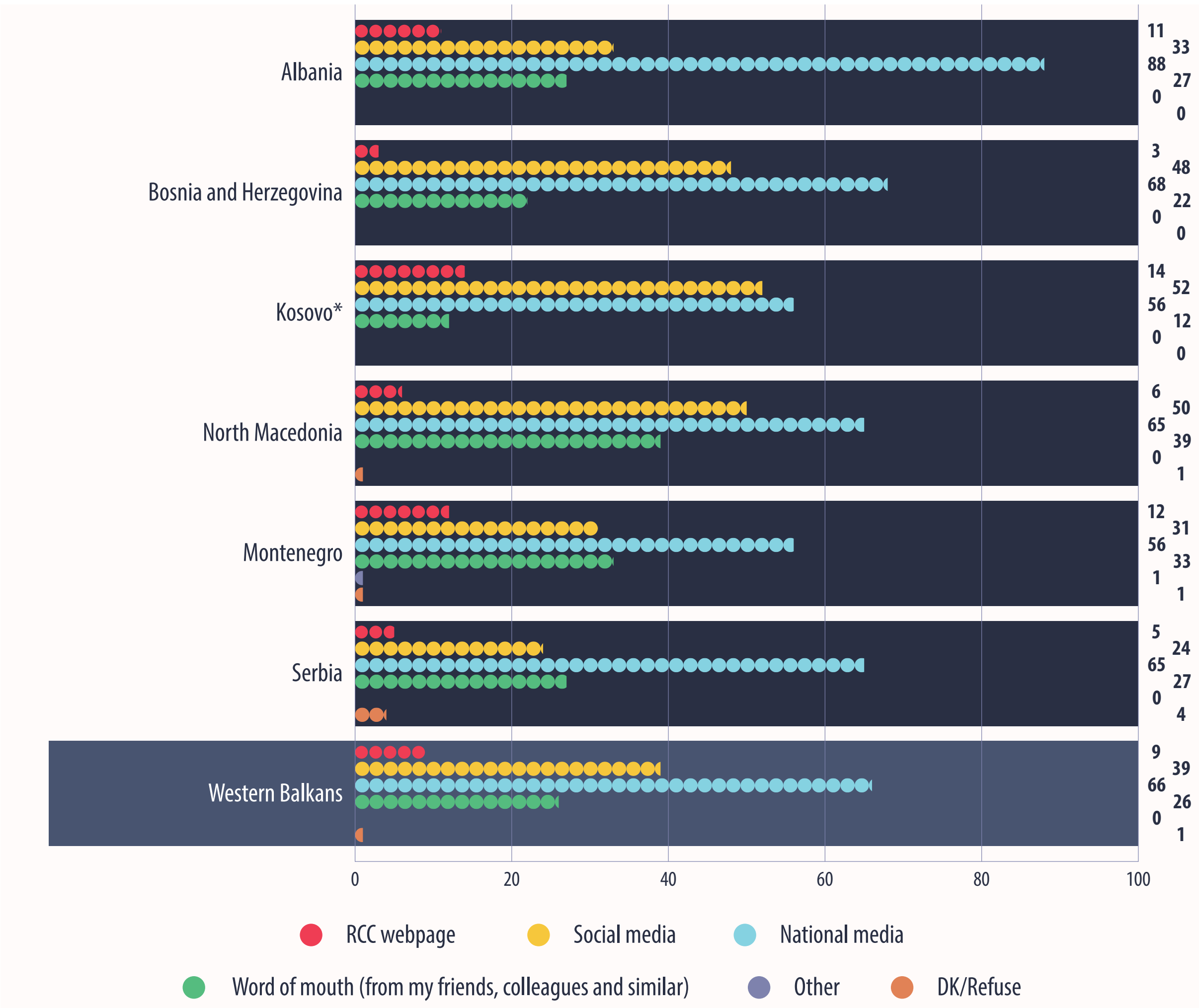


Amongst those who have heard of RCC, a large majority have done so due to cooperation activities and initiatives, around 78% of respondents. Another 43% is familiar with the initiative on free roaming in the region and associate the RCC with that area. At economy level, roaming is the reason for hearing about RCC mostly in North Macedonia and Montenegro, with 54% and 53%, respectively, while there is a lower connection in Bosnia and Herzegovina (22%). For Montenegro, roaming has been even more a higher incidence in hearing about RCC than cooperation (which is the main reason in all other economies).

Figure 81: In what context have you heard about the Regional Cooperation Council (RCC)?
(Those who have heard about RCC, n=2003 multiple answers, %)

There is a variety of sources of information used by respondents in the region to hear about the RCC. Two thirds of them have heard about it from domestic media, while social media is in the second place with 39%. Word of mouth accounts for another quarter of respondents (26%). The RCC webpage has been another source but with only 9%. At the economy level, domestic media is at the top for the entire region, with a share ranging from 56% in Kosovo* and Montenegro up to 88% in Albania. Social media has been particularly useful in this direction in Kosovo* and North Macedonia, with 52% and 50% of respondents, respectively. Word of mouth has been effective mostly in North Macedonia (39%) and Montenegro (33%).

Figure 82: How did you hear about the Regional Cooperation Council (RCC)?
(Those who have heard about RCC, n=2003, multiple answers, %)



NOTE ON METHODOLOGY

The Public Opinion Survey was conducted as quantitative research and data was collected by using CAPI (Computer-Assisted Personal Interviewing) data collection method. The interviews were carried out via direct, face-to-face household interviews by trained interviewers from Indago-led consortium of research companies between 3 March and 4 April 2023 in Albania, Bosnia and Herzegovina, Kosovo*, North Macedonia, Montenegro and Serbia. As part of the project set-up phase, some preparations and adjustments were undertaken as necessary for the successful implementation of the survey:

Questionnaire

The survey questionnaire was provided by RCC and finalised by Indago. The Public Opinion Survey questionnaire was composed of a total of 77 questions, including the demographic questions (region, gender, age, education, ethnicity, marital status, household income). The questionnaire was originally written in English by RCC and subsequently translated into related local languages by Indago. RCC reviewed and approved all the translations of the questionnaire. Since CAPI methodology was used in the research, all questionnaires were programmed/converted to a digital form to include necessary scripting and interviewers' instructions and installed on interviewers' laptops/tablets. The programmed questionnaires were reviewed by a responsible person in each economy.

Interviewers

The survey was conducted by experienced interviewers in all WB economies. All the interviewers were given written instructions containing general description of the questionnaire, method of selecting addresses/households for the interviews and description of respondent selection method. In addition to the written instructions, all interviewers were trained to understand research goals, interviewing method and eligible respondent selection (a random route for selection of households and last birthday method for selection of a respondent within a household). The project coordinators/domestic team leaders reviewed the entire programmed 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.).

Sample

Public Opinion Survey was conducted on at least N=1,000 respondents, aged 18+ in each WB economy, with the total of 6,027 respondents for the entire WB region. Additional criteria related to target group which also had to be met were:

- People who are permanent residents of respective economies
- People who reside in private households
- People who are able to speak respective local languages well enough to respond the questionnaire.

A stratified two-stage clustered design sample with random route for the selection of addresses and last birthday rule for the selection of respondents from a list of all 18+ household members was used in the survey. The sampling selection process was random in the following stages: selection of sampling points, selection of addresses, selection of households and selection of individuals aged 18 and older. Primary sampling units (clusters) were the enumeration districts/neighbourhoods and secondary sampling units were the dwellings (addresses). In order to create the sample design, the most recent available statistical data for each economy was used. The sample structure for each economy is presented in the tables below.

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 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 proportionally, based on the number of inhabitants in each size of settlements or municipality, either urban or rural, in the region/county, while the number of sampling points was defined based on the obtained number of respondents (for each region/county and in each size of settlement or municipality, either urban or rural). The maximum number of respondents per one sampling point was on average 10.

After defining their number, the sampling points were selected randomly, with probability proportional to size within each stratum, and according to the last census data. Households in each sampling point were chosen by a random walk method. Individual respondents in a randomly selected household were selected by the last birthday criterion. This means household member aged 18 and over whose birthday was most recently was to be interviewed. There were no circumstances under which the interviewer was allowed to replace selected respondent with another member of the same household. If the selected respondent was not available for any reason after 3 attempts to reach him/her, the interviewer had to go to the next address.

SAMPLE STRUCTURE

Table 1: Sample structure by region

Economy	Region	%
Albania	Berat	4.1%
	Dibër	3.9%
	Durrës	10.4%
	Elbasan	9.3%
	Fier	10.0%
	Gjirokastër	2.0%
	Korçë	7.1%
	Kukës	2.6%
	Lezhë	4.2%
	Shkodër	6.9%
	Tiranë	32.9%
	Vlorë	6.6%
Bosnia and Herzegovina	Federacija Bosne i Hercegovine	62.1%
	Republika Srpska	35.5%
	Brčko Distrikt	2.4%
Kosovo*	Ferizaj / Urosevac	10.5%
	Gjilan / Gjilane	10.6%
	Peja / Pec	10.1%
	Mitrovica	11.0%
	Prizren	18.8%
	Gjakovë / Gjakovica	11.4%
	Prishtinë / Pristina	27.7%
North Macedonia	Vardar	8.0%
	East	9.0%
	Southwest	8.0%
	Sourtheast	10.0%
	Pealgonia	12.0%
	Polog	13.0%
	Northeast	8.0%
	Skopje	32.0%
Montenegro	North region	22.0%
	Central region	52.0%
	South region	26.0%
Serbia	Belgrade	23.7%
	South and East Serbia	21.9%
	Central and West Serbia	28.3%
	Vojvodina	26.1%

Figure 83: Sample structure by gender

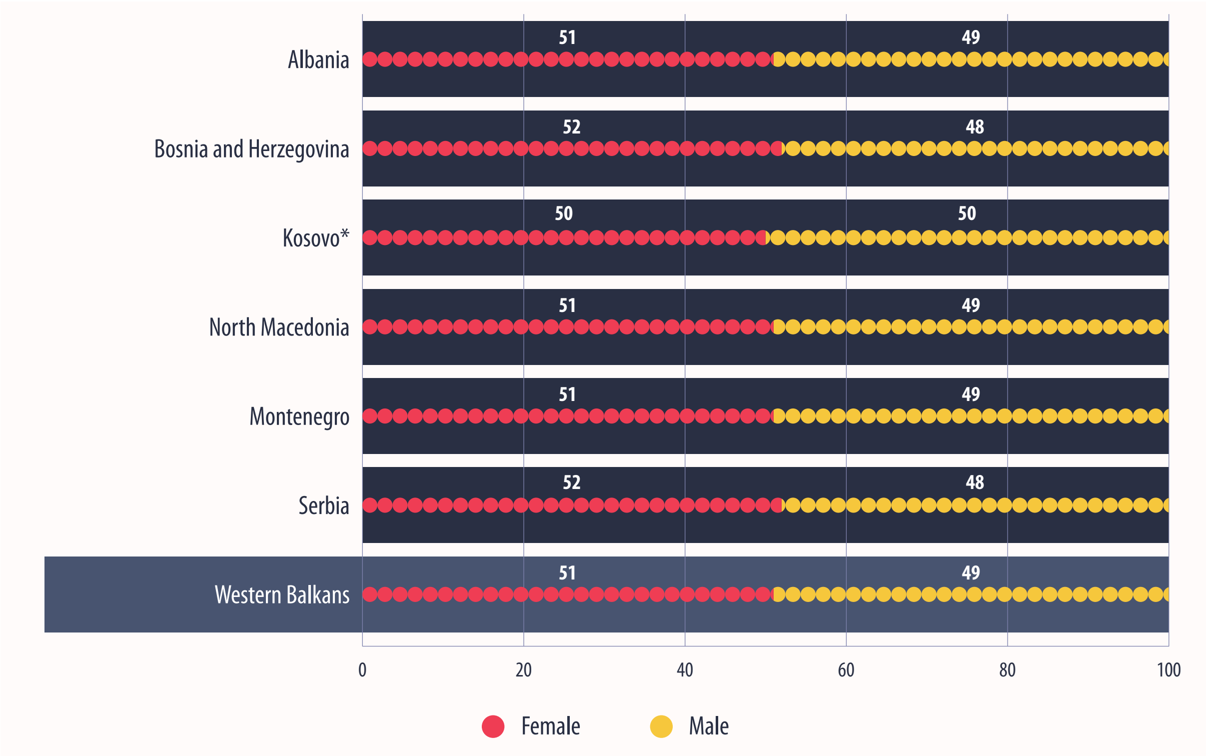


Figure 84: Sample structure by age

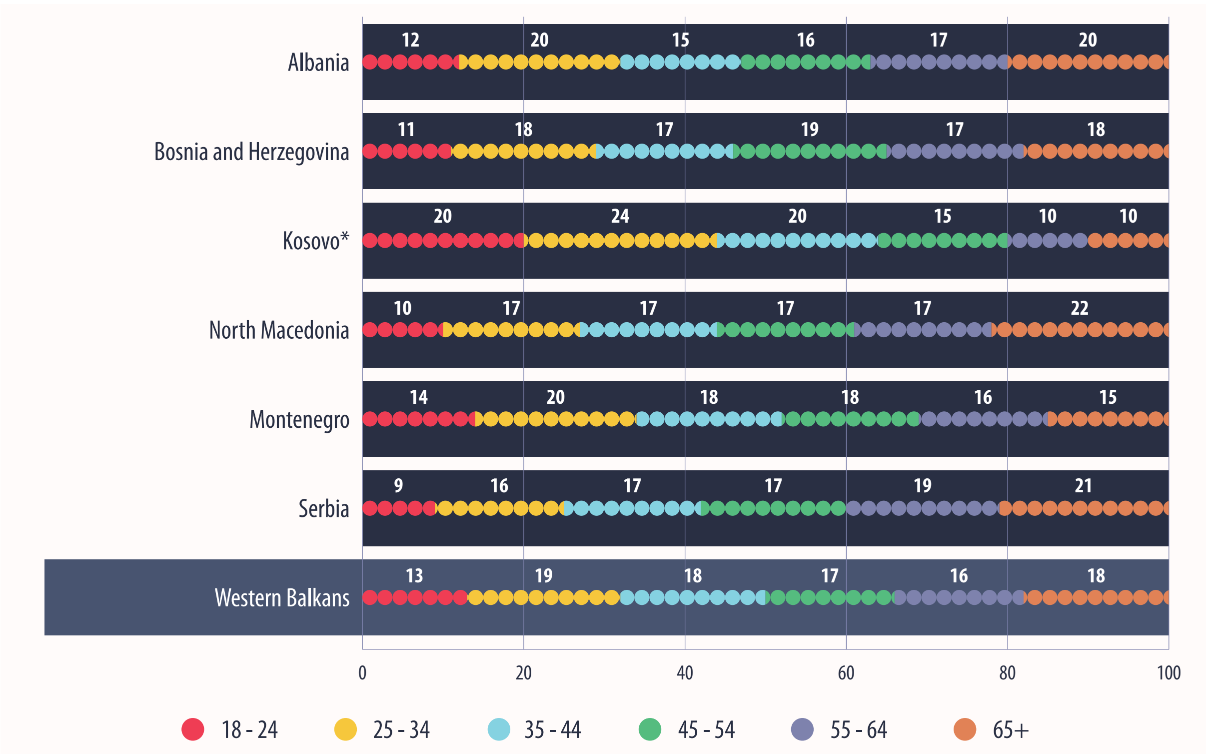


Figure 85: Sample structure by education

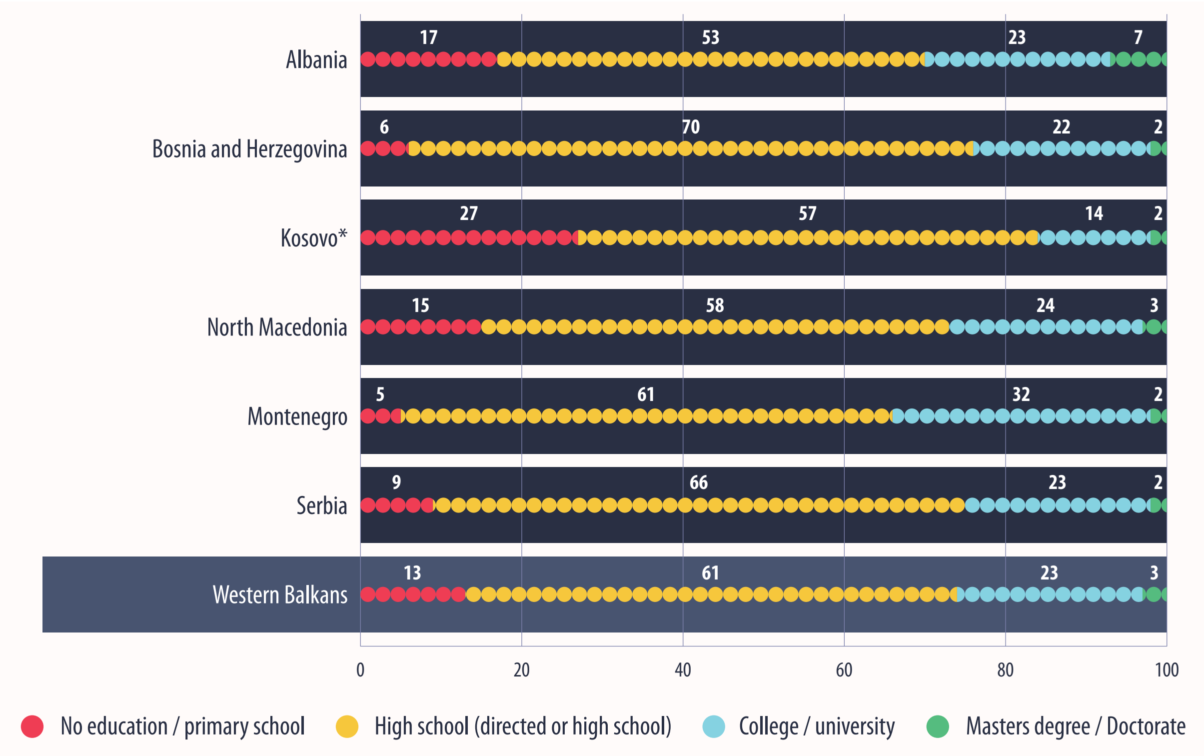
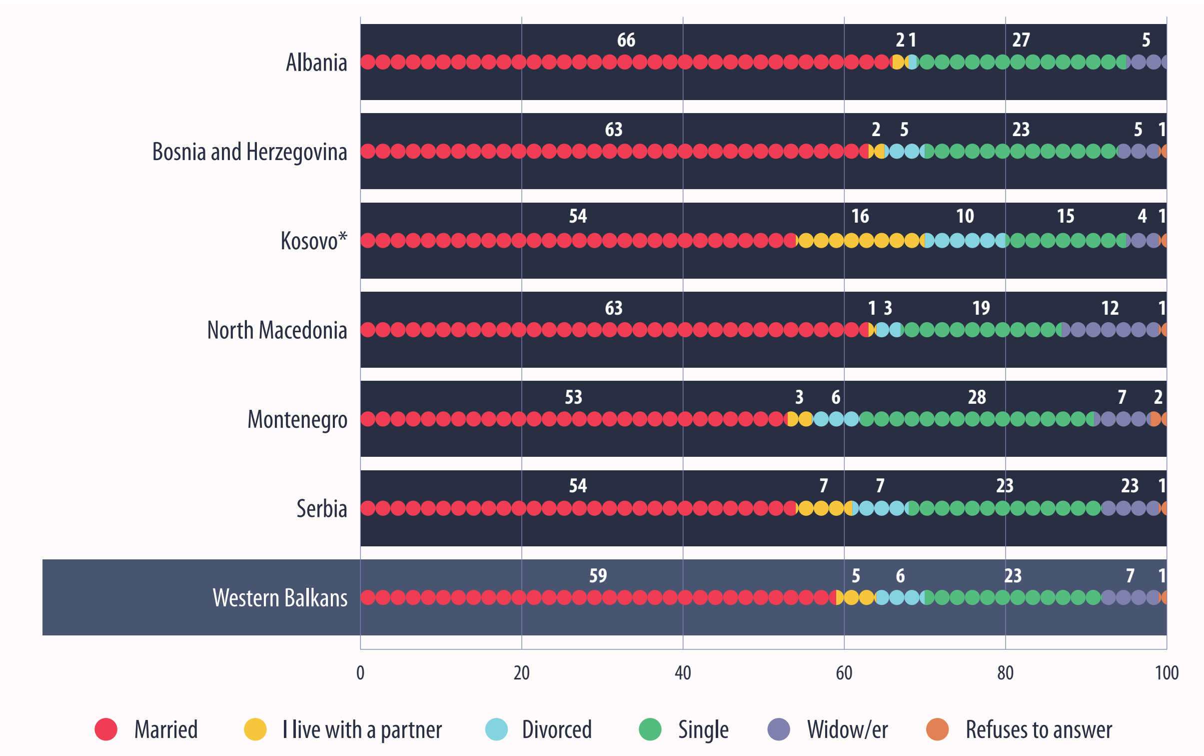


Figure 86: Sample structure by marital status



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