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BALKAN BAROMETER 2022

PUBLIC OPINION

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BALKAN BAROMETER 2022

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FOREWORD

The Regional Cooperation Council has the pleasure to present the 2022 edition of the Balkan Barometer- the annual survey of Western Balkan citizens and business perceptions. The analysis of the results provides a detailed insight into trends and evolution of the attitudes of thousands of region's citizens and businesses across socio-economic-environmental topics affecting their everyday lives. We are certain that monitoring the public sentiment will once again prove to be of a great importance to understand the citizens' and businesses' attitudes towards current situation and the expectations for the region's recovery under the new circumstances created as result of a war in the European continent amid the pandemic.

The period when the interviews were conducted coincided with the emergence of the new strain of SARS-COV2 virus, labelled Omicron2 that led to an increase in cases throughout the region, followed by the outbreak of war in Ukraine. Therefore, this Barometer edition reflects the new reality created on the one hand by the pandemic entering the third year, and on the other hand, by the war in Ukraine which has the potential to re-define global security for the decades to come. Without doubts, the findings of this last edition are particularly significant in offering a clear understanding of what these subsequent global crises mean on the ground, what are the impacts and consequences in the economy and daily life of the citizens, and what are the citizens' prospects.

This extreme moment has created opportunities for greater solidarity and sentiments for stronger cooperation in the region. We are particularly proud that this year's edition reconfirms the ongoing incremental improvements in sentiment in the region related to regional cooperation. Solidarity can be easily described as the epitome for the Western Balkans, as more than two-thirds (69%) of participants believed that what brings the region together is bigger than what drives it apart (from 29% in 2020). The vast majority of citizens in the Western Balkans (76%) saw a positive correlation between regional cooperation and better political, security and economic situation. Additionally, findings note an increase of positive feelings related to the region. While in 2020, 36% of respondents associated positive feelings with the Western Balkans, this number has incremented by 6 points.

As the COVID-19 pandemic has almost been overcome in all economies of the region, the virus threat perception is much lower. However, the region is still on the recovery path from the pandemic, and in light of the war in Ukraine, the possible new socio-economic challenges have the potential to jeopardise the IMF projections that the WB economies will return to the pre-pandemic GDP level over 2022.

Economic development and unemployment remain the two most pressing obstacles in the region. The current economic situation is considered the biggest challenge by 47% of respondents in the Western Balkans. On the other hand, unemployment is most detrimental to the economy, according to 39% of respondents. Corruption is again ranked third with 27%, while the share of those seeing emigration as a negative trend is increasing (18%, from 13% in 2020).

Confidence in the socio-economic benefits of EU membership prevails in the region, with 60% endorsing accession. While, in general, the Western Balkan economies are the EU's greatest cheerleaders, the number of respondents who expect EU integration by 2025, has further subtracted (22% from 24% in 2020 and 28% in 2019). In addition, 28% of participants considered EU accession a mere desire rather than a realistic scenario and this percentage is consecutively rising. 37% others believed that their economies would integrate in the EU by 2030 the latest. This worrying trend can be understood as a direct consequence of the frustration in the region at consecutive delays in moving forward on the EU path. **More than ever before, the EU must be firm in accelerating merit-based prospect of EU membership for the Western Balkans first and foremost as a geostrategic investment in the EU's own security.**

Results of this cycle of the Balkan Barometer show that the region remains **firmly in favour of more free trade in the region and with the EU**. Despite a moderate decrease, support for strengthening trade links within the region remains high (a regional average of 51% of respondents, 58% in 2020), while almost one-third (31%, same as in 2020) believe current trade links within the region are sufficient. The share of those expecting that the entry of foreign companies into the domestic market will improve conditions for costumers is as high as in the previous round (68%).

Awareness of the citizens on the **Roam Like at Home** regime applied in the region is on the rise, with one-third of respondents being familiar with it, some 42% heard of it but they didn't know how it functioned, and 26% were not aware that it either existed or that it was signed.

However, the number of those not aware is to be read in conjunction with the fact that 40% of the respondents had not recently travelled in the region and consequently did not make use of the roaming free regime.

When it comes to environment, the level of climate awareness has not changed. Over two-thirds (67%) consider climate change a problem and nearly a third (31%) do not see it as a pressing concern. Less people than a year ago (66%, 73% in 2020) see pollution as a problem. In addition, half of respondents of the region are sceptical of achieving climate neutrality by 2050%. Six in ten respondents (62%) are willing to buy environmentally friendly products even if they cost more. A vast majority of over three-quarters (77%) of survey participants are unaware of what circular economy is.

These figures are a strong call to action for promoting environmental awareness and education of citizens for better understanding of natural environment protection and the activities that can cause harm to the environment. Proper information of citizens about the environmental challenges that the region faces, and inspiring them to act by demanding change will also support the implementation of the ambitious Green Agenda for the Western Balkans.

INTRODUCTION

The release of the eighth edition of the Balkan Barometer comes at times when Europe is facing unparalleled challenges to its security, while still facing the perils of the economic crisis induced by the outbreak of the Covid-19. The war has aggravated uncertainties caused by the pandemic in ways that will reverberate across the world, and the Western Balkans region cannot remain intact. Yet, the 2022 edition of the Balkan Barometer, sharing evidence and insights of citizens and businesses perceptions, builds on its firmly established tradition as independent, reliable source of regional data widely employed and referenced by media, business, civil society, and decision makers alike.

The 2022 Balkan Barometer surveys were conducted between mid-February to mid-March 2022 in Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, North Macedonia and Serbia. The Public Opinion survey posed 109 questions to 6029 citizens and the Business Opinion survey presented 177 questions to 1203 business owners, managers, or executives. Answers by survey respondents have been systemised, analysed, and presented in the two reports – Public Opinion Survey and Business Opinion Survey.

Since its first edition, the Balkan Barometer has increasingly evolved in order to remain relevant, and up to date in a challenging regional landscape. Questions are added and removed to better serve the usefulness in reading and interpreting trends across the region, therefore making the Balkan Barometer an independent guide to attitudes towards cooperation and integration, as well as attitudes to other key policy areas both at domestic and regional levels, that affect daily lives of the Western Balkan citizens. We take satisfaction in the fact that Balkan Barometer findings are used to inform the work of decision makers, scholars and other interested regional stakeholders, by also making them aware of the societal eagerness for sustainable and far-reaching reforms.

* 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

The regional Balkan Public Sentiment Index recorded a trivial subtraction in 2021 (45% from 46% in 2020). The overall BPSI, however, increased by 10 points over the 8-year period (compared to 35% in 2014). **Whilst the public sentiment for the present situation remains unchanged** (41%, the same as in 2020), the region's optimism has doubled (50% compared to 28% in 2020).

Solidarity can be easily described as the epitome for the Western Balkans, as more than two-thirds (69%) of participants believed that what brings the region together is bigger than what drives it apart (from 29% in 2020). This shows a positive trend of increase in the sense of shared belonging at both regional and economy levels. Confidence in the socio-economic **benefits of EU membership prevails** in the region, with 60% endorsing accession. While in general the Western Balkan economies are the EU's greatest cheerleaders, the number of respondents who expect EU integration by 2025, has further subtracted (22% from 24% in 2020 and 28% in 2019). In addition, 28% of participants considered EU accession a mere velleity rather than a realistic scenario and this percentage is consecutively rising. 37% others believed that their economies would integrate in the EU by 2030 the latest.

Although the socio-economic consequences of the COVID-19 pandemic started to be felt more in 2019 and 2020, thus negatively affecting the Western Balkan population's sentiment and outlook of the economic situation, a more optimistic view is shared by the population in 2021. Kosovo* is the region's most hopeful economy, followed by Montenegro (56%) and Serbia (55%). Bosnia and Herzegovina on the other hand, represents the least optimistic economy, (41% from 29% in 2020). Overall, results of all eight cycles of Barometer indicate a moderate increase of life satisfaction While BPSI incremented annually at regional level (45%, from 35% in 2014), individual economies followed different trends, and therefore results indicate fluctuations of the positive sentiment.

While the number of respondents who live in worse conditions than the average population increased, concerns over the increasing inequality among the society spiked simultaneously. 82% of the region believed that the **gap between the poor and the rich** is consecutively increasing while 12% didn't share the same concerns. 7% refused to respond. Albania with 88% is home to the highest share of concerned respondents over the wealth gap.

Participants who are unhappy with the way things are developing in their economies are still greater in number than their counterparts. Findings from this cycle, however, indicate a slight positive shift in favour of the satisfied group. 25% of respondents were happy, while 49% had negative feelings. While roughly one-fifth (20%) see their economy as doing well, more than a third (35%) describe their household financial situation as positive. The number of respondents unhappy with their financial situation has also increased (36%). These findings indicate an incremental sentiment of neutrality of households, who claim that their financial situation is neither satisfying nor dissatisfying (29%). Respondents show a tendency to view their own situation with more optimism than their economy.

Economic development and unemployment remain the two most pressing obstacles in the region's economy. The current economic situation is considered the biggest challenge by 47% in the Western Balkans. On the other hand, unemployment is most detrimental to the economy, according to 39% of respondents. Corruption is again ranked third with 27%, while the share of those seeing emigration as a negative trend is increasing (18%, from 13% in 2020).

Violence against women remains a big concern in the region (59% from 65% in 2020), and unfortunately, the COVID-19 lockdown has increased cases of domestic abuse. This negative phenomenon should be treated with priority by respective governments. Prejudice about gender roles in society is again the second most prevalent concern, reaching 26%, same as gender discrimination in remuneration between men and women (26%).

Government investment is of high importance for economic development. Contrary to the previous barometer, which mostly (46%) underlined the need for governmental funds for social infrastructure, this cycle recorded different findings. 15% of respondents believed that agriculture is of high potential for investment, while (14%) thought that health and mental health services should be given priority. Industrial development (12%) is increasingly being viewed as an area with great potential, while education was the least prioritised sector for governmental funds (5%).

More than half of the interviewees claimed to be employed (57%), while 13% had no jobs. The rest of participants were retired or studying. On the other hand, some 13% claimed they were looking for a job but were not engaged in any position, 6% were not working because they had to take care of their families and children, 16% of respondents were retired and 8% were currently studying. At regional level, the private sector was the predominant source of employment (68%), while 32% of respondents worked in public administration.

The public sector is once again the most preferable sector of employment (28%), while the private sector remains the least desirable sector to work in, due to the high level of uncertainty, (15%). Job security (55%, from 37% in 2020) is consecutively seen as the biggest advantage of working in the public sector. However, most of respondents who prefer the private sector value higher salaries (54%).

Learning new skills is not perceived as an important tool to remain relevant in a competitive work environment. For instance, vast majorities (80% to 98%, among economies) did not receive any training to improve their digital skills, although they are the most required (37%). One-fifth either engaged in self-learning or attended online courses, while the rest (11% to 17%) either received on-the-job training, attended paid training funded by themselves or their employers, or other public programmes. Though the overall share of those who got trained either doubled or tripled, returning to the 2019 levels, it is very little compared to those who did not. Findings on the purposes for which the Internet has been used show similar patterns as in 2020, for the ten categories surveyed. While data misuse by third parties was citizens' biggest concern in the last cycle, their mistrust over stolen personal information contracted this year (27%, from 37% in 2020). 17% of citizens are sceptical of making any payment online, while 20% prefer to buy goods in person. Interestingly enough, 51% of the region had no concern over the security of different internet websites.

The new Roam Like at Home model, which aims to eliminate all roaming costs within the region, was familiar to one-third of respondents. Some 42% heard of the regional initiative but they didn't know how it functioned, while 26% were not aware that the agreement either existed or that it was signed. The newest use of technologies, including 5G can provide advantages such as faster internet connection, enabling the use of other new technologies etc. The region's perspective over 5G's benefits differs, however. While one-fifth of respondents expected a faster internet connectivity through 5G and 17% were confident of using the newest technologies, 20% were reluctant that 5G would somehow affect their daily lives.

Regarding labour market **mobility**, there is a very moderate increase in the share of respondents who were considering leaving their respective economies for better opportunities abroad (39%, from 37% in 2020), while over half (54%) are not considering working abroad in the near future. Kosovo* is home to the highest share of those considering leaving (59%), while 63% in North Macedonia are not considering such an option. While the EU remains the top destination for 70% of those considering leaving, Bosnia and Herzegovina has the highest number of respondents (86%) who would emigrate to the EU for work.

Despite a **moderate decline in support for governments' affirmative measures for marginalised groups** such as people with disabilities, displaced persons and refugees, Roma and other minorities, such measures are widely supported in all economies. Overall, 90% support employment-related affirmative measures for people with disabilities, 74% for other minorities (81% in 2020), 74% for Roma minorities (79% in 2020) and 73% (78% in 2020) for displaced persons or refugees. On the other hand, the share of respondents who support affirmative housing measures for other minorities remains high (70%), though it contracted by 10 points. Housing support for people with disabilities is most supported (at 90%).

Social exclusion remains a challenge in the region. While 10% of citizens feel looked down because of their income, this is a 4-point subtraction compared to 2020. On the other hand, one-fourth of respondents were afraid that they could fall in the poverty trap, while 12% feel excluded from their societies. The situation is even worse given that prejudices towards Roma remain worryingly high: 64% (68% in 2020) wouldn't allow their child to marry a Roma person, while 36% feel uncomfortable to rent housing to Roma. Respondents find working with Roma the most acceptable of the eight options surveyed (at 71%), followed by their children going to the same school with Roma children (at 70%), and buying products from them and maintaining friendship with them (both at 69%). Persistence of prejudices towards Roma communities in all region's economies and the refusal to engage with them in daily lives, especially in critical spheres of socialisation such as at work or in schools, remain stumbling blocks to antidiscrimination policies and to their integration in the respective societies.

Results of this cycle of the Balkan Barometer show that the region remains **firmly in favour of more free trade in the region and with the EU**. Despite a moderate decrease, support for strengthening trade links within the region remains high (a regional average of 51% of respondents, 58% in 2020), while almost one-third (31%, same as in 2020) believe current trade links within the region are sufficient. While improving trade relations within the region enjoys the highest level of support in Albania (64%), Kosovo* experienced the starkest drop in the number of those who support more trade links among the region's economies (to 38%, from 76% in 2020). The share of those expecting that the entry of foreign companies into the domestic market will improve conditions for costumers is as high as in the previous round (68%).

A vast majority in the region prefer trade with the EU (69%) over other markets such as Turkey (41%), China (35%) and Russia (33%). Confidence among respondents that their domestic products and services are competitive compared to those of other regional economies (85%) and of the EU (76%) is also very high. While domestic products remain the top choice over the Western European and the regional ones, there is a consecutive decrease in the number of respondents who would choose their own products and not imported goods.

Transport infrastructure and connections, together with the environment and climate change, is among the most important areas in the context of the decarbonisation process. As transport infrastructure and connections are key preconditions to enhancing trade and economic integration, reforms and investments in this area are key priorities for both individual economies and regional initiatives and the EU. Initially part of the Berlin process, the former 'connectivity agenda' has since 2020 been advanced to the Green Agenda for the Western Balkans, supported by EU's Economic and Investment Plan (EIP) as a financing instrument, also with a view to making the region, the same as the EU, carbon-free by 2050.

Reflecting the needs for reforms and investments in the Western Balkans to bring more sustainable results more quickly, **citizens' satisfaction with the quality of transport infrastructure and connections in the region has not increased** since the 2020 round. An average of nearly two-thirds (63%) of respondents are satisfied, while nearly a quarter (24%) are dissatisfied. While Kosovo* remains home to the biggest share of satisfied respondents (77%), Bosnia and Herzegovina remains the region's most dissatisfied economy (at 42%).

Sharing the same extent of needs to improve the situation of the environment across the region, the level of **climate awareness has not changed**. Over two-thirds (67%) consider climate change a problem and nearly a third (31%) do not see it as a pressing concern. While it is seen as a concern by 76% in Albania, Kosovo* has recorded the highest increment of participants in this group (from 14% to 41%). Less people than a year ago (66%, 73% in 2020) see pollution as a problem. At the economy level, North Macedonia outran Kosovo* as the most concerned one (76%), while only 41% in the latter considering it a problem. In addition, half of respondents of the region are sceptical of achieving climate neutrality by 2050. Six in ten respondents (62%) are willing to buy environmentally friendly products even if they cost more. A vast majority of over three-quarters (77%) of survey participants are unaware of what circular economy is.

Trust in institutions has improved slightly for a second consequent year, yet key aspects of rule of law have stagnated. The credibility of central governments stands at 40% and Ombudsperson institutions are the most trusted (44%), and only one-fifth of respondents (21%, from 24% in 2020) trusts political parties. In addition, judicial systems remain the least independent of political influence (at 66%), while 53% disagree that Ombudsperson institutions are independent of political influence. On rule of law, unfortunately there is an increasingly widening gap between participants who do not trust the law (62%) versus those who see law as reliable and equally applied means (35%). On equal application of law, public perception has deteriorated: 69% do not trust that law is being equally applied in their economies. Albania leads the negative contingent (at 82%), and in Kosovo* 57% think that it is applied equally. Moreover, the trend of incremental improvements in citizens' trust in judiciaries found in the previous round has reversed, seeing deterioration on all the five indicators.

There is a positive trend on using online public services to acquire personal documents: 26% are using such online services, while 22% are aware that they exist. Related to this, 39% of the region switched to online services during the pandemic, while 61% still used traditional mechanisms. Kosovo* (60%) is home to the highest number of respondents who switched online, as opposed to only 25% in Montenegro.

There is a somewhat better picture on citizens' participation in government in decision-making, although only 7% claim to have participated in public debates. Others participated through protesting (16%) or expressing their views and comments over social networks (13%). Discussing government decisions with friends and acquaintances remains the most common form compared to others (at 31%). Much smaller shares took part in protests (16%), participated through social networks and otherwise through the Internet (13%) or took part in public debates (7%). Only engaging with friend and acquaintances as a basic form of participation is at 45% in Albania, as opposed to Kosovo* (16%). Of those not participating, 45% either feel powerless or refuse to be publicly exposed, while 32% either do not feel responsible or do not trust their governments. In Bosnia and Herzegovina 64% feel either powerless, distrustful, or careless, while 57% feel so in North Macedonia.

As the COVID-19 pandemic has almost been overcome in all economies of the region, threat perception from its virus is much lower. In terms of impact from COVID-19, unemployment now tops the list of concerns (at 47%), followed by poverty and social inequality (44%), healthcare (39%), coronavirus (31) and corruption (29%). Most notably, 21% less (52% in 2020) see the coronavirus as the most worrying issue. In individual economies, unemployment tops the list in Montenegro (at 58%, the same as in 2020), while North Macedonia and Serbia (both at 37%) stand on the other end of the scale.

There is still a high level of scepticism over governments' efforts to protect people from losing their jobs during the COVID-19 pandemic: 48% of respondents think that their governments are not doing enough to protect them from losing their jobs. In Bosnia and Herzegovina, 64% (a 7-point increase since 2020) do not think that their government is helping in saving jobs, while in Kosovo* 55%, an overwhelming 50% more than in the previous round, think that their government was doing enough to save their jobs. On anti-COVID-19 mitigation measures, the biggest share (30%) prefers not travelling.

REGIONAL OVERVIEW

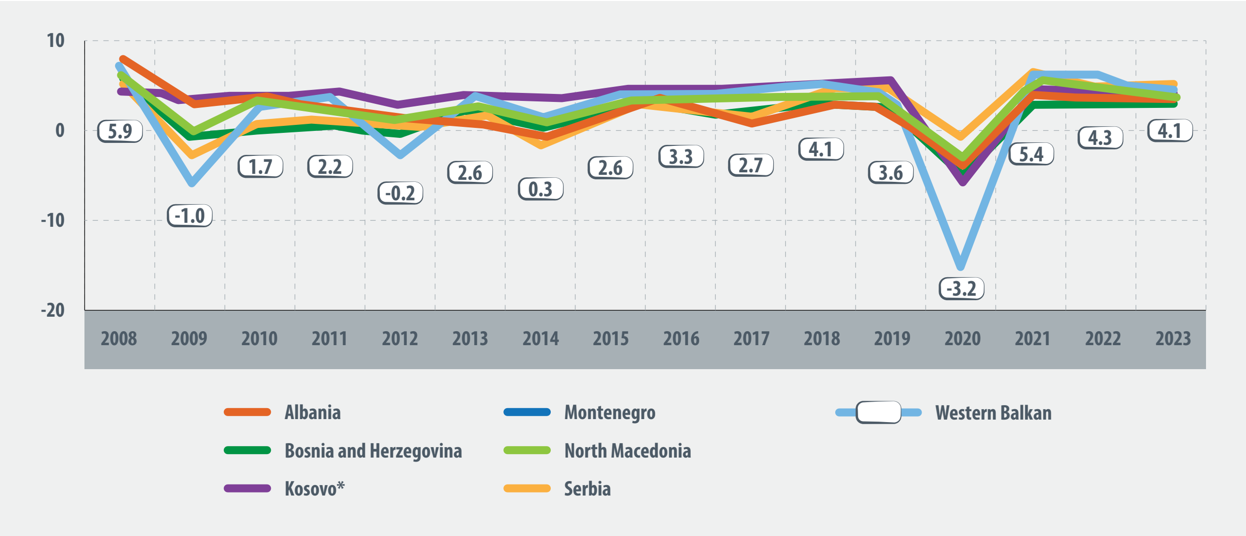
The economies of the Western Balkans continued to operate under varying conditions in 2021, determined with the new variants of the coronavirus Covid-19 and the commencement and progression of the immunisation process. From the beginning of the year, the delta variant of the virus has been dominant, but has been intercepted with the start of the immunisation process, the earliest in Serbia approximately in February 2021, followed by other economies in the second quarter of 2021. Yet, the pace of the immunisation process stalled after the summer, amid the spread of the omicron variant in the last quarter.

On average, the total regional economy recovered with a growth rate of 5.4% in 2021, with some between-economy differences (**Figure 1**). While these figures are not final yet (i.e. present the latest estimates), they suggest that the WB economies have been on the path or post-pandemic recovery, yet on average not reaching their pre-pandemic level. There is some variation in the GDP growth in 2021: Montenegro faced the steepest growth of 7%, after the severest drop of -15.2%, followed by Serbia (6.5%), Kosovo* (6%), Albania (5.3%), North Macedonia (4%), while the smallest growth is observed in Bosnia and Herzegovina (2.8%).

MF projections suggest that the WB economies will return to the pre-pandemic GDP level over 2022, which is a slight delay compared to the previous assessment, but apparently driven by the new waves of the pandemic over 2021 and the more-sluggish-than-expected vaccination progress. An average WB growth of 4.3% is expected over 2022, with growth rates ranging between 3.3% and 5.6% across the region. Yet, these projections have been made in October 2021, while the beginning of 2022 brought new and serious geopolitical risks and developments, with the invasion of the Russian Federation over Ukraine. While the dependence of the Western Balkan economies on trade and financial flows with Russia and Ukraine is varying, the region will likely experience growth deceleration channelled through the deceleration of the economic activity in the European Union and the soaring prices of primary food and energy.

Figure 1 – Real GDP Growth in the Western Balkans 2008-2023

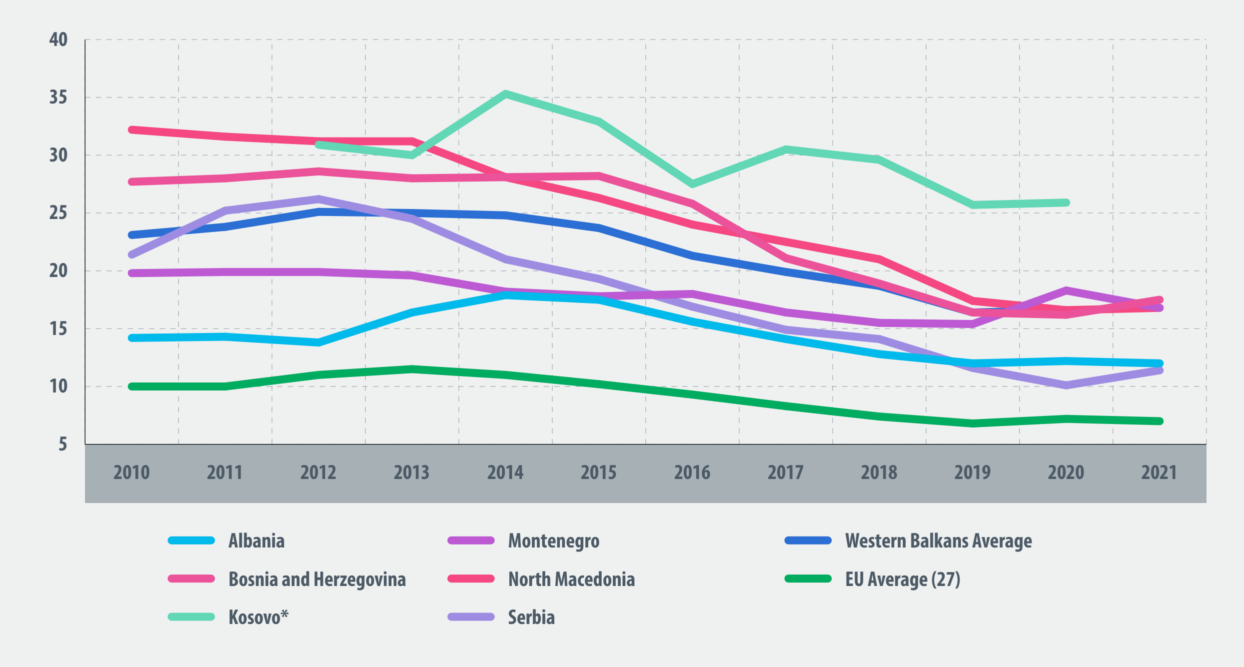
(Source: IMF World Economic Outlook, WB GDP weighted average growth rate)



In 2020, the unweighted average unemployment rate for six Western Balkan economies was 16.6%, while in the EU (27), this average was 7.2%. In 2021, the unweighted average unemployment rate for selected WB economies[1] was 14.9%. Across the WB region, there were some distinctive patterns in 2021. In 2021, compared to 2020, Albania and Montenegro lowered their unemployment rate by 0.2 pp and 1.5 pp respectively. On the other hand, Bosnia and Herzegovina, North Macedonia and Serbia had an increase of the unemployment rate by 1.3 pp, 0.2 pp and 1.3 pp respectively. Unemployment data for Kosovo* for 2021 is not yet available (Figure 2).

Figure 2: Unemployment rates in the Western Balkans, 2010-2021

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



Source: RCC ESAP 2 Observatory on employment in the Western Balkans (https://www.esap.online/observatory/) The Covid-19 pandemic caused fiscal deficit to soar in all Western Balkan economies in 2020, while consolidation in 2021 has been rather gradual. The average deficit rose from 0.6% of GDP in 2019 to 7% in 2020, while it declined to only 5.7% in 2021 (IMF World Economic Outlook). The latter reflects the persistent need for the government to continue with some key measures in the first quarter to first half of 2021, as well as the general need not to tighten fiscal policy too rapidly and kill the recovery. The largest deficit was incurred in Albania, 6.7% in 2021, with lack of fiscal consolidation (a deficit of 6.9% in 2020). Likewise, Serbia tightened only slightly (a fiscal deficit of 6.5% in 2021 compared to 7.3% in 2020), while the rest of the economies tightened fiscal spending more decisively: it was Montenegro which reduced the fiscal deficit the most, from 10.9% in 2020 to 5% in 2021. Such deficits across all economies of the Western Balkans are still above pre-pandemic trends, and the legacy of the pandemic is a stock of public debt that has now reached historic highs in all economies except Serbia and Bosnia and Herzegovina.

In line with global conditions, by the end of 2021, inflationary pressures in the Western Balkans have been on an upward trajectory. Average inflation was projected to reach 2.6 percent in 2021 from 0.9 percent in 2020 (IMF World Economic Outlook), driven by the post-pandemic rebalancing and the price pressures on the markets for primary commodities and energy. In fact, such

1 According to data from five WB economies, excluding data for Kosovo*, which is not available as of May, 2022

price pressures significantly soared by the end of the year, as year-end inflation rate averaged 3.4% for the entire WB region, with pronounced intra-regional differences. It was Kosovo* which experienced the most significant price increases by the end of 2021: 5.4%, followed by Serbia 4.1%, North Macedonia 3.8%, Montenegro 2.9%, Albania 2.1% and Bosnia and Herzegovina 1.6%. Such price movements, although single-digit and fairly low, posed significant concerns pertinent to the real living standard, since the region has undergone a decade of very low inflation rates: the average for the five years before the pandemic hovered from 0% in Bosnia and Herzegovina to 1.9% in Serbia.

BALKAN PUBLIC SENTIMENT INDEX (BPSI)

The Balkan Public Sentiment Index (BPSI), initially established to observe the changes of citizens' sentiment over time, was also calculated in this cycle of the Balkan Barometer. In this instalment, the BPSI is comprised of the seven following questions:

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

BPSI measures the participants' 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 answers for Q1 to Q4, scored as follows: I'm completely dissatisfied - 0 points, I'm mostly unsatisfied – 25 points, neither satisfied nor dissatisfied – 50 points, I'm mostly satisfied – 75 points, I'm completely satisfied – 100 points. Answers for Q5 and Q6 are composed of three comparative categories: same, better, and worse.

BPSI consists of two sub-indexes, BPSI-Present Situation Index and BPSI-Expectation Index, which separately observe the present sentiment and future expectations of SEE citizens. Afterwards, BPSI results are compared to the results of the previous cycles on regional and economy levels, separately.

The following presents BPSI results for 2022 and compares them to results of the previous cycles, both for each economy individually and the Western Balkan region as a whole.

Figure 3: Balkan Public Sentiment Index (BPSI)

(Scores on a scale from 0 to 100)

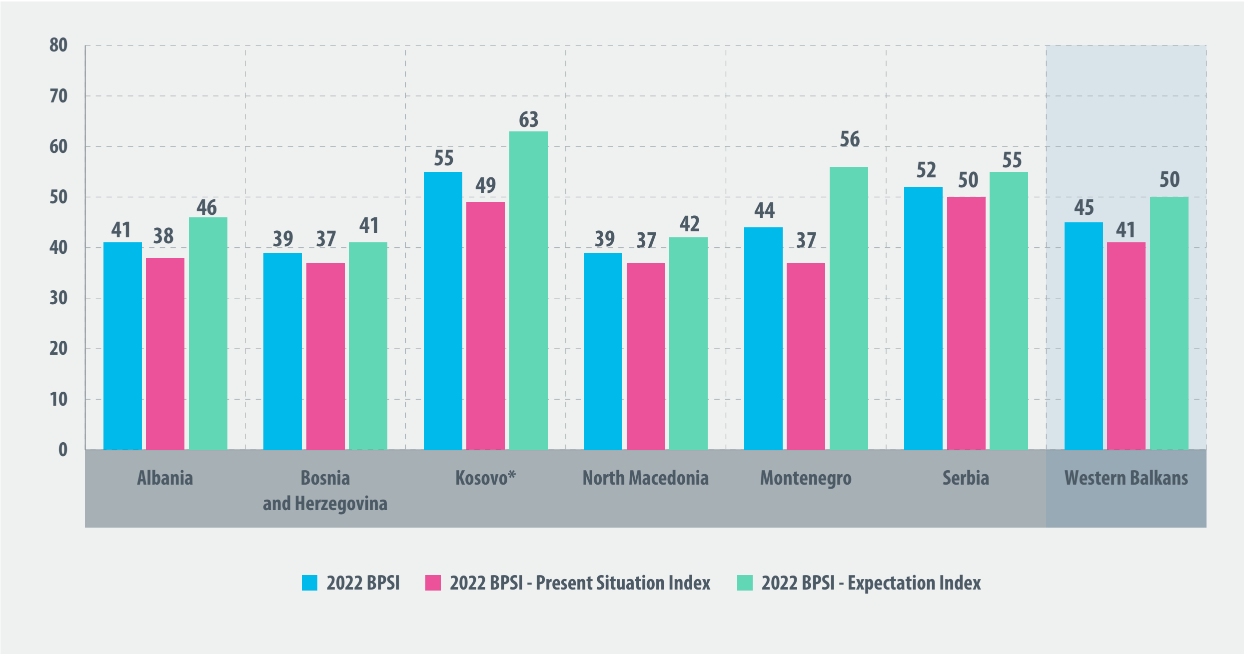
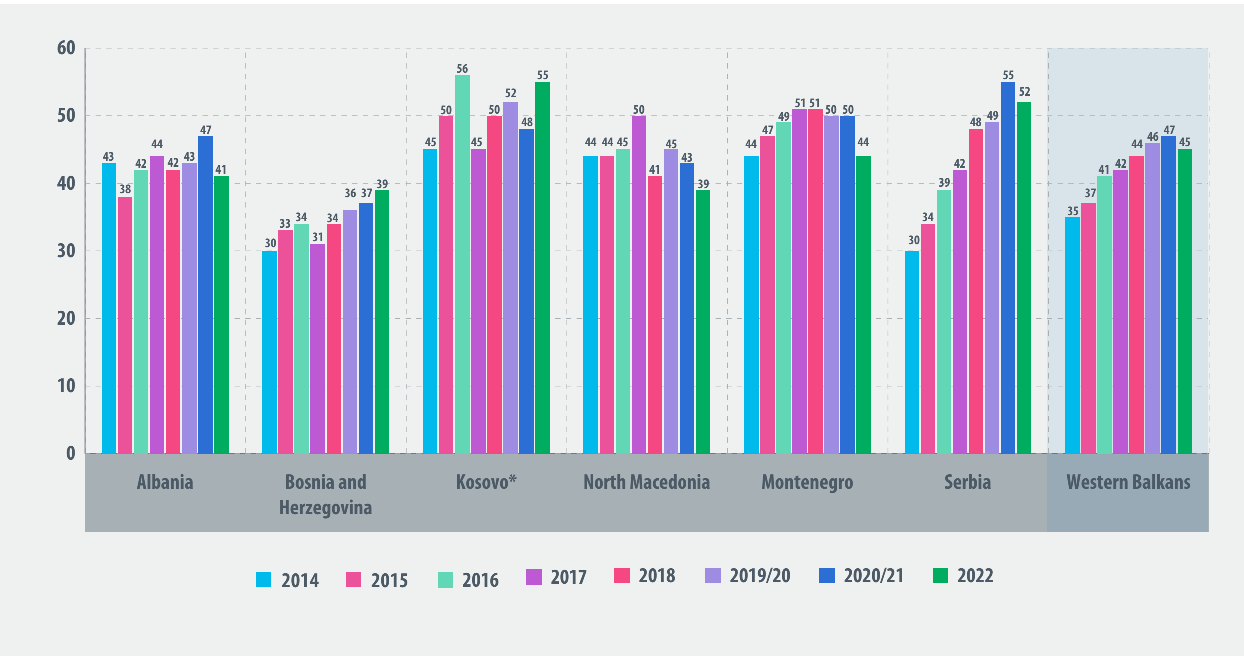


Figure 4: Balkan Public Sentiment Index (BPSI) – comparison 2014/2015/2016/2017/2018/2019/2020-2021/2022

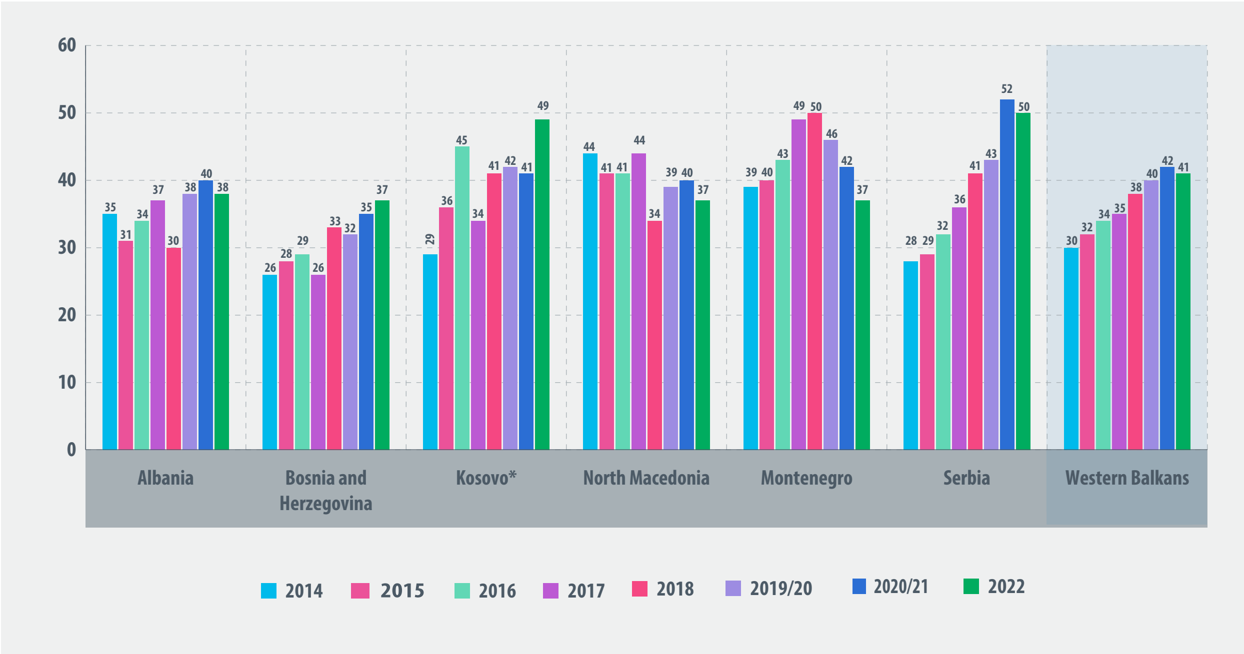
(Scores on a scale from 0 to 100)



Though the regional BPSI slightly contracted in 2021 (45% from 46% in 2020), it has scored a remarkable increment of 10 points over the 8-year period (compared to 35% in 2014).

Figure 5: Balkan Public Sentiment Index (BPSI) - Present Situation Index – comparison 2014/2015/2016/2017/2018/2019/2020-2021/2022

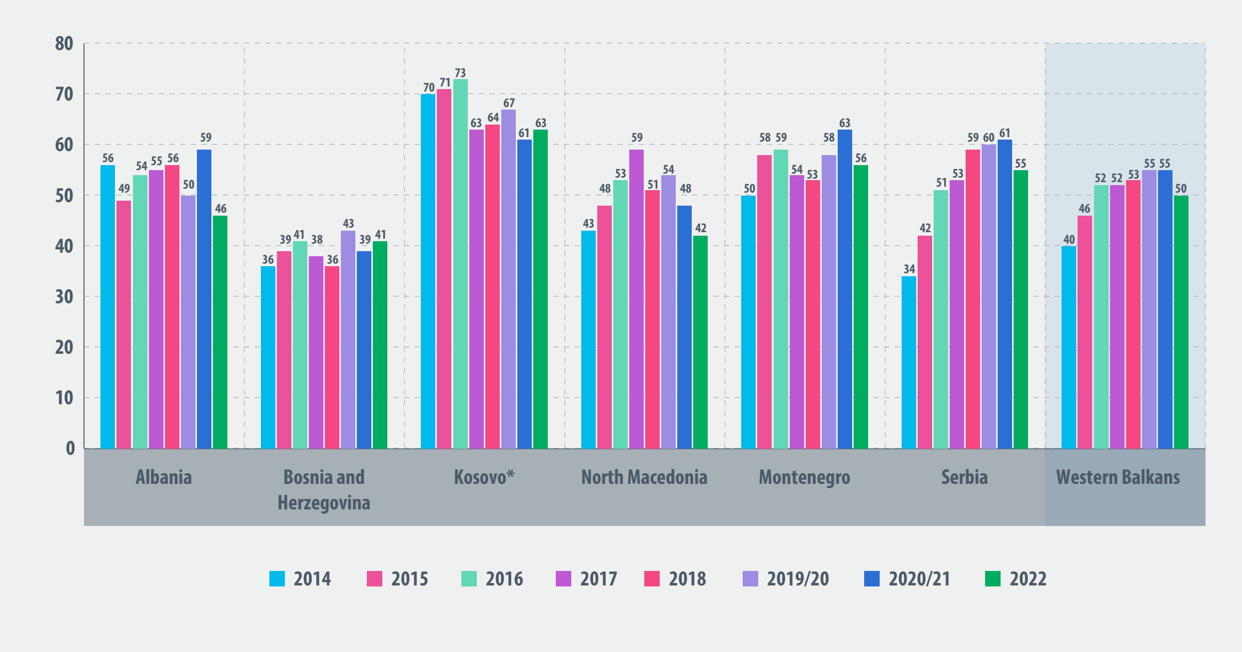
(Scores on a scale from 0 to 100)



Whilst the public sentiment for the present situation remains the same (41%, the same as in 2020), the region's expectations for the future have doubled (50% compared to 28% in 2020). Though the COVID-19 pandemic unravelled its socio-economic consequences in 2019 and 2020, thus negatively affecting the Western Balkans population's sentiment and outlook of the economic situation, a more optimistic view is shared by the population in 2021. Kosovo* is home to the most optimistic population regarding the future (63%, from 61% in 2020). Montenegro and Serbia remain in the top three economies with a predominant positive outlook, with 56% and 55% of their respective populations feeling optimistic.

Albania has managed to somehow restore its positive outlook (46% from 20% in 2020), though its population's expectations for the future have significantly contracted over the years (46% from 56% in 2014). Meanwhile, 42% of respondents from North Macedonia shared a positive sentiment for the future (from 28% in 2020). Bosnia and Herzegovina, on the other hand, represents the least confident economy, despite a 12-point increment (41% from 29% in 2020).

Figure 6: Balkan Public Sentiment Index (BPSI) – Expectation Index – comparison 2014/2015/2016/2017/2018/2019/2020-2021/2022



Overall, results of all eight cycles of the Barometer show that life satisfaction in the region is moderately increasing. While BPSI has incremented annually at the regional level (45%, from 35% in 2014), the same cannot be said for all individual economies, as results indicate fluctuations of positive sentiment.

From a closer perspective, results by each economy show that over the 8-year period, Serbia scored a remarkable 22-point increase in the public sentiment survey (52% from 30% in 2014). Kosovo* however, is home to the highest concentration of respondents who share a positive sentiment for the current situation (55%). In contrast, North Macedonia recorded a double negative trend: it recorded the lowest level of satisfaction in the region (39%) as well the sharpest decline of positive sentiment over the years (39% from 44% in 2014).

Annual results show that once again, Serbia is home to the most satisfied economy with the present situation (50%, from 49% in 2020). On the contrary, though Bosnia and Herzegovina, North Macedonia and Montenegro share the least satisfied respondents with the current situation, the latter recorded the sharpest decrease in overall satisfaction, with a 4-point decrease in present BPSI (37%, from 41% in 2020). Albania, meanwhile, maintained the same level of positive public sentiment as last year (38%).

LIFE SATISFACTION AND ASSESMENTS OF GENERAL TRENDS

The sentiment of solidarity remains an epitome for the Western Balkans, with more than two-thirds (69%) of respondents focusing on what brings the region together rather than drives it apart (from 29% in 2020). Thus, two significantly positive trends are noted: a greater sense of shared belonging, at both regional and economy levels.

Participants who are dissatisfied with the way things are developing in their economies still outnumber their counterparts. Despite this, a slight positive shift in favour of the satisfied group was noted. 25% were mostly/completely satisfied, while 49% nurtured negative feelings. This cycle recorded two interesting trends: households were being increasingly neutral towards their financial situation (29%) and they had the ongoing tendency to view their own situation in more positive terms compared to that of their economy. While roughly one third thought their economy was doing well, more than a third described their household financial situation as positive. This cycle showed that households who are satisfied with their financial situation no longer outnumber their pessimistic counterparts. Statistically speaking, 35% of respondents were satisfied with their financial situation, while 36% were unhappy.

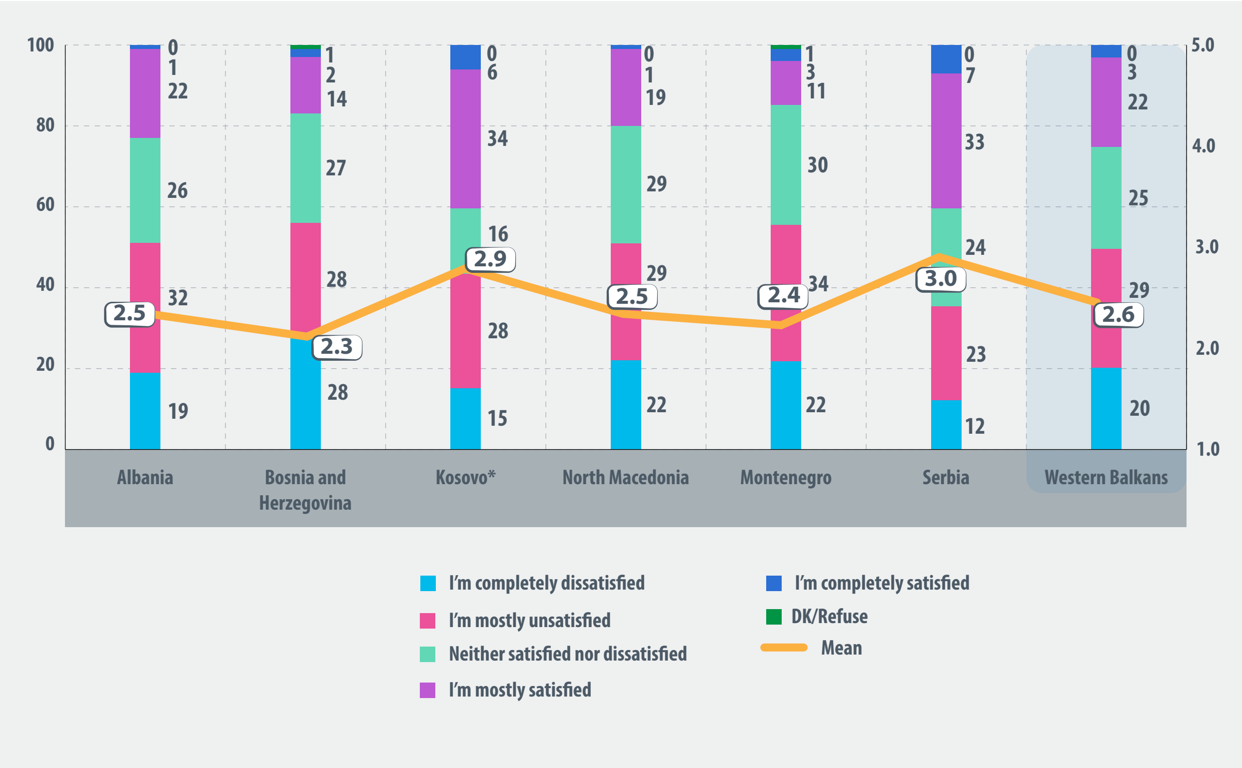
Economic development and unemployment remain two most prevailing challenges in the region. The current economic situation is considered the most detrimental challenge by 47% of the Western Balkans. On the other hand, unemployment is considered the main obstacle to the economy by 39% of respondents. Corruption again ranked third with 27%, while emigration is seen as a negative and worryingly increasing trend, as 18% (from 13% in 2020) of participants were concerned of its consequence in their economies.

Unfortunately, violence against women remains a big concern in the region (59% from 64% in 2020), and respective governments should actively engage in combating this negative phenomenon. The slight difference from the previous year may be attributed to the end of lockdown measures, which have left many women isolated with their abusive partners at home, with often tragic consequences. However, the concerning trend is maintained. Prejudice about gender roles in society is again the second most prevalent concern, reaching 26%, same as gender discrimination in remuneration between men and women (26%).

With governmental investments being of crucial importance for economic growth, public opinions over the classification of sectors by their potential for investment differ. Contrary to the previous barometer, which mostly (46%) focused on governmental funds for social infrastructure, this cycle recorded different findings. 15% of respondents believed that agriculture requires immediate investment, while (14%) thought that health and mental health services should be given priority for investment. Industrial development (12%) is an increasing and preferred sector with great potential, while education was not considered a matter of priority for investment (5%).

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

(All respondents, N=6029, share of total, %) single answer, share of total, %)



Though participants who are not happy with the way things are developing in their economies still outnumber their counterparts, results indicate a slight positive shift in favour of the satisfied group. In statistical terms, 25% (from 22% in 2020) of respondents are either mostly or completely satisfied, 49% have opposite feelings, while 25% have a neutral attitude on developments in their economy.

At economy level, 40% of residents from Kosovo* and Serbia are content with how their economy is developing, while Bosnia and Herzegovina and Montenegro (56%) are the region's most disappointed economies in terms of how things are developing. Moreover, those polled in Montenegro who were neither satisfied nor dissatisfied comprise 30% of the entire population, while 1% of respondents chose not to answer this question. While there is a lot of room for improvement, the last cycles of Barometer record a gradual improvement in the overall mood; as recently as 2017, only 14% were pleased with developments, while more than half of participants were unhappy (56%).

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

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

(All respondents, N=6029, single answer, share of total, %)

Except Serbia and Kosovo*, the predominant share of respondents from the Western Balkans are unhappy with the current economic situation. Moreover, the number of dissatisfied participants has increased by 2 points, (56%, from 54% in 2020). In contrast, some 20% of the respondents in the region are happy with the economy.

At economy level, negative public sentiment fluctuates between two extremes; despite its 5-point increase, only 38% of those polled in Serbia are unhappy with the economic situation, while Albania and North Macedonia (with 66%) are both homes to the most dissatisfied respondents. Some 58% of respondents in Montenegro feel that the economic situation in their economy significantly deteriorated over the past year, while 42% of participants from Kosovo* share the same concern.

Though a negative sentiment prevails in the region, some economies recorded a slight improvement in respondents' perception of the current economic situation. Respondents from Kosovo* (41%) are the most satisfied with the current state of affairs, followed by Serbia (33%). Despite remaining one of the most reluctant economies in the region, Bosnia and Herzegovina recorded a 3-point spike of respondents' satisfaction with the economic situation, unlike Albania, North Macedonia and Montenegro that simultaneously recorded contraction of satisfied respondents and scored the lowest levels of satisfied populations (12%). The percentage of people who were neither satisfied nor dissatisfied also decreased by 6 points (23% from 29% in 2020).

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

(All respondents, N=6029, single answer, share of total, %)

Unlike the last two years, the households satisfied with their financial situation no longer outnumber their pessimistic counterparts. In statistical terms, 35% of respondents were satisfied with their financial situation while 36% were unhappy. The findings indicate two interesting trends: an increased share of respondents who point out that they are neither satisfied nor dissatisfied regarding their households' financial situation (29%, from 34% in 2020) and the respondents' ongoing tendency to view their own situation in more positive terms compared to that of their economy. While roughly one-fifth (20%) saw their economy as doing well, more than a third (35%) describe their household financial situation as positive. The number of Western Balkan residents who were neither satisfied nor dissatisfied subtracted by 5 points (29%).

While most economies in the region recorded an increase in the number of satisfied respondents, the percentage of those unhappy with their own financial situation incremented simultaneously and without exception. Albania and Montenegro co-lead the region in terms of dissatisfied participants (42%). On the other end, only one-fourth in Serbia (27%) are unhappy with their financial situation. Kosovo* on the other hand is home to the highest concentration of households happy with their finances (48%), while Montenegro is the economy with the least excited households (26%). Last but not least, North Macedonia (35%) is the most neutral economy when it comes to households' satisfaction with their finances.

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

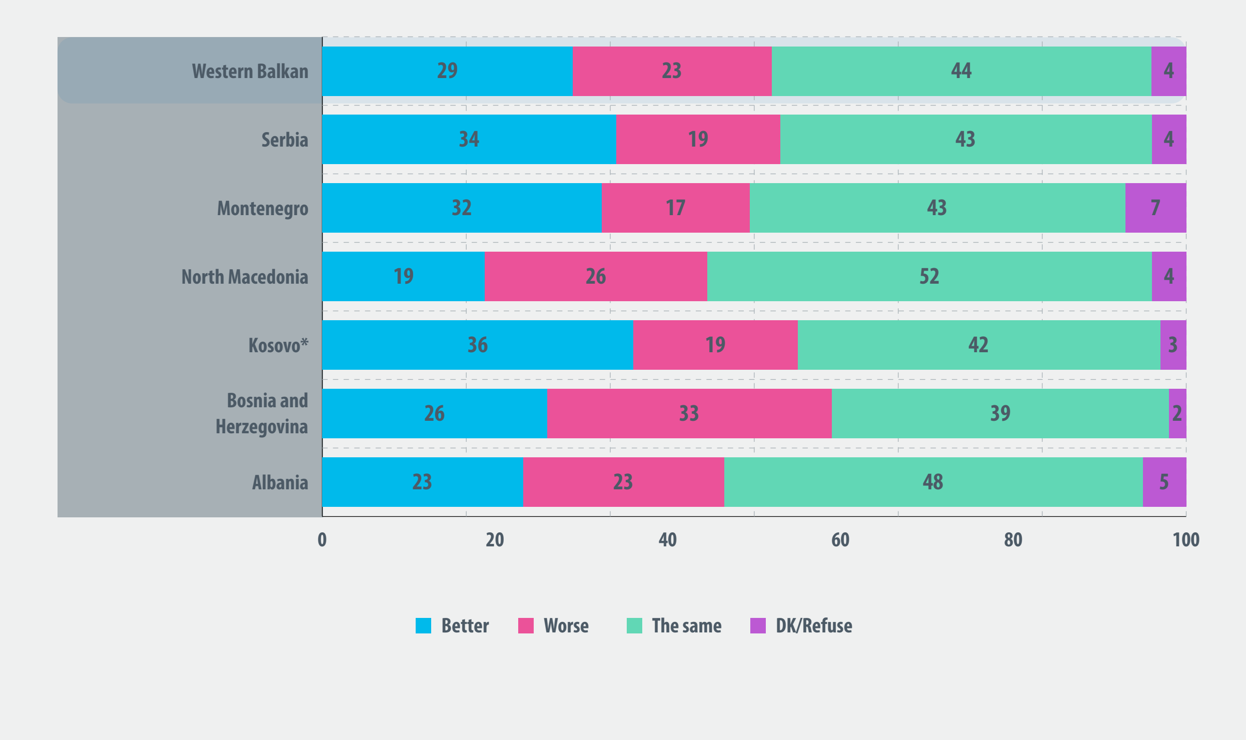
(All respondents, N=6029, single answer, share of total, %)

Contrary to the perceived slight deterioration in the economic status of individual households, it seems that the general satisfaction with the way economy tackles security challenges has improved. Results somehow paint a split perception of the economic environment, with 33% of respondents being satisfied with the way their economy tackles security threats, while some 35% have concerns. In general, there has been a notable 4-point decrease of dissatisfied participants, followed by a simultaneous 9-point increment of currently satisfied citizens.

Though recording a 1-point increase since 2020, Serbia (20%) remains home to the lowest concentration of unhappy residents. Surprisingly enough, Kosovo*, one of the leading economies in terms of dissatisfied respondents in 2020, not only contracted the number of unhappy residents (27% from 40% in 2020) but managed to remarkably outrun the other economies in terms of citizens' confidence in how threats are being addressed (53% from 10% in 2020). On the other hand, Bosnia and Herzegovina (55%) again stands out as the region's most sceptical and unsatisfied economy, followed by Montenegro (39%).

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

(All respondents, N=6029, single answer, share of total, %)



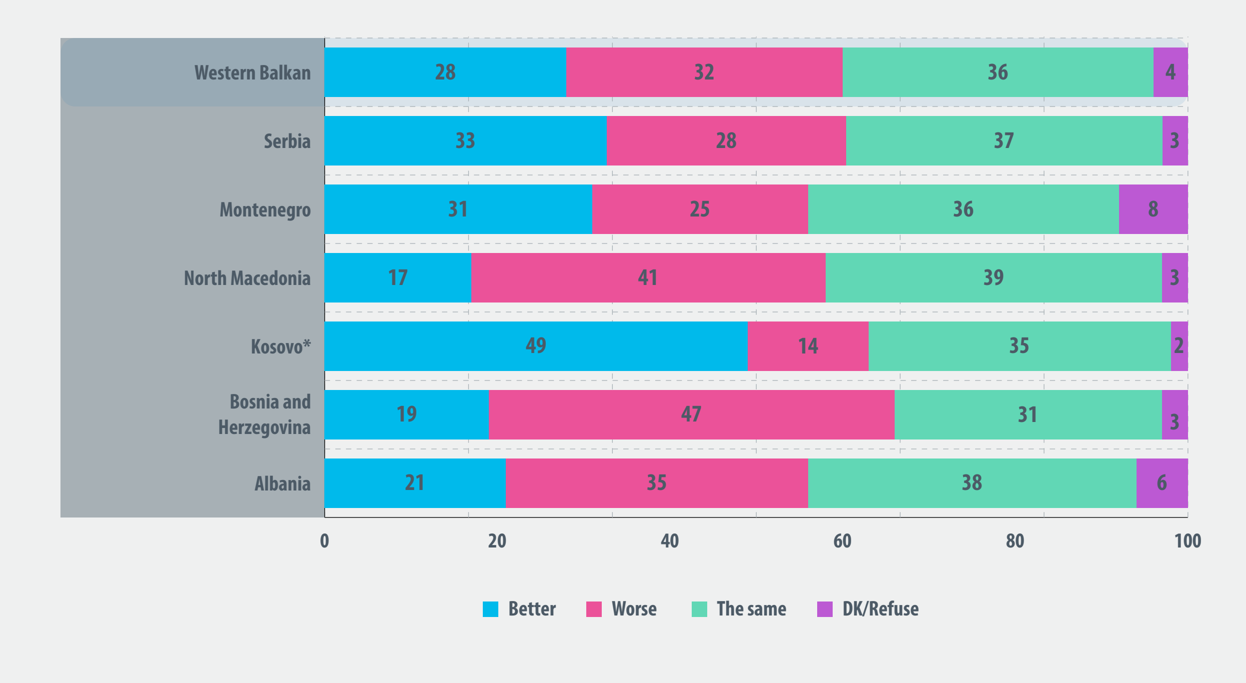
Results indicate a different outlook compared to previous Balkan Barometer editions. With a 4-point subtraction, less than one-third of the region's residents (29%) are confident that their financial situation will get better, while an incremental sentiment of scepticism prevails in the region, with roughly one-fourth of participants (23%) expecting to see a deterioration in their finances in the near future. Furthermore, findings indicate a slight cutback of respondents who do not expect any changes in their financial prospects (44%, from 46% in 2020).

Speaking of individual economies, findings show a cumulative 8-points spike in the number of respondents in Kosovo* (36%) who are optimistic of their financial situation, while 19% expect their finances to worsen. At the other end of the scale stands Bosnia and Herzegovina as the region's most pessimistic economy, with approximately 33% of residents fearing that their finances will only get worse. The other economies, unfortunately, have not only recorded a contraction in the number of respondents who view their financial situation as auspicious in the next 12 months, but have also marked a spike in favour of pessimism. Only some 19% of respondents from North Macedonia view their financial situation with optimistic lenses, while one-fourth of the population (26%) believe that their finances will deteriorate in the near future.

Albania represents an example of ambiguity: while 23% of respondents indicated optimism about their finances in the near future, the same number of respondents were concerned of their financial situation in the future. Serbia on the other hand marked a contraction in terms of optimistic participants (34% from 37% in 2020) and an incrementing share of the pessimistic group (19% from 13% in 2020). On the other hand, North Macedonia (52%) recorded the highest number of participants who neither expect improvement nor deterioration in their finances.

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

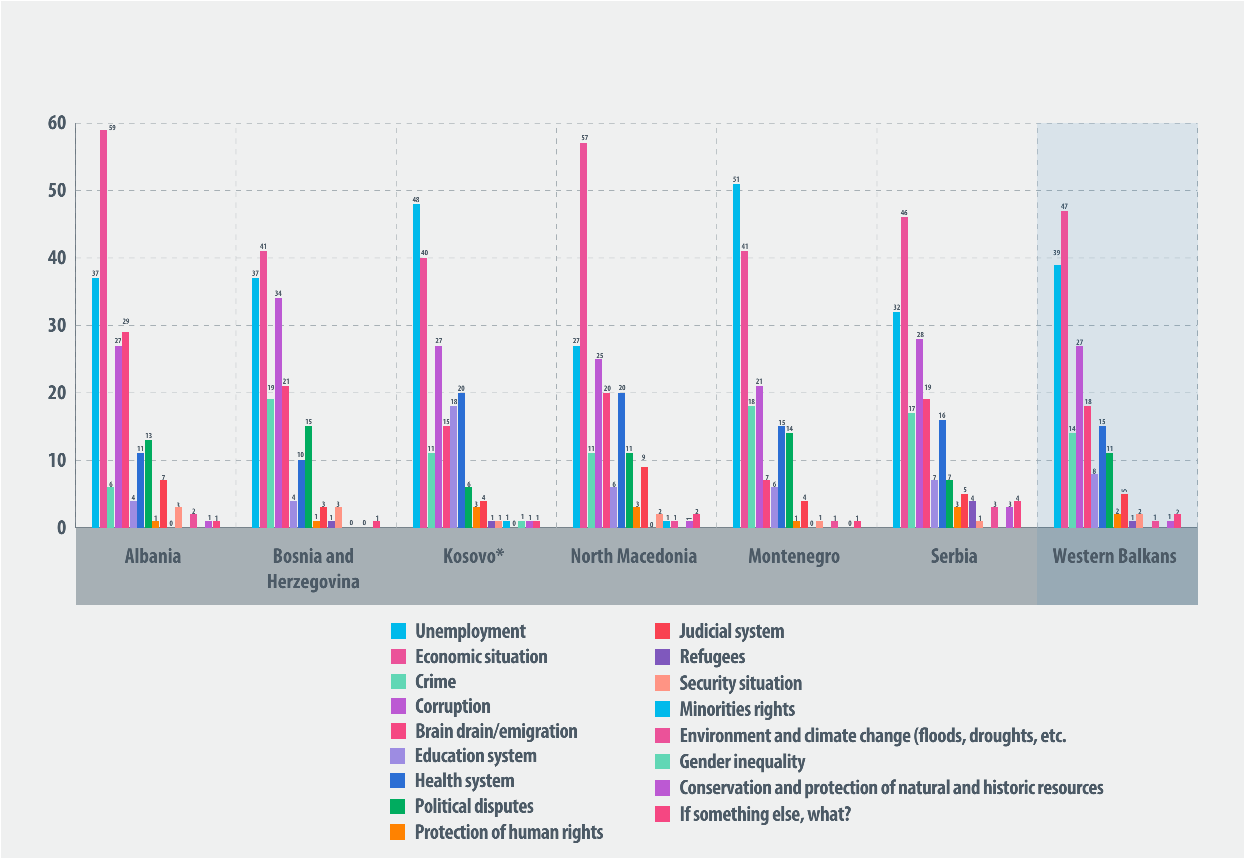
(All respondents, N=6029, single answer, share of total, %)



At regional level, citizens' expectations on the state of their economy slightly diminished. A little less than one-third of respondents (28%, from 30% in 2020) seem to expect their economy to improve, versus 32% who stand pessimistic (from 26% in 2020). Kosovo* recorded a remarkable 23-point spike of positivity for the future, with roughly half of the population (49%) having faith that the state of their national economy will improve. In contrast, Albania witnessed the sharpest subtraction of optimistic respondents (21% from 42% in 2020). The region's leading pessimist is once again Bosnia and Herzegovina, with 47% of participants fearing that the economy will only deteriorate in the near future (from 46% in 2020).

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

(All respondents, N=6029, maximum two answers, share of total, %)

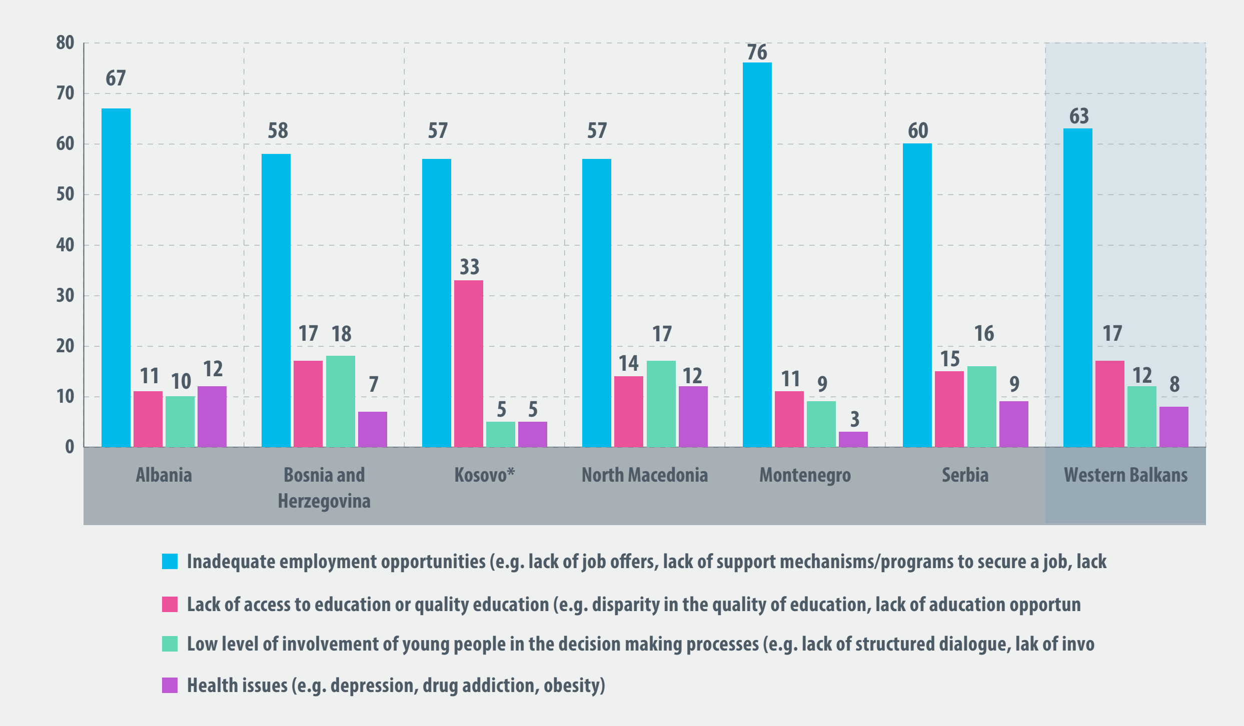


Economic development and unemployment remain two most prevailing challenges in the region. Though it recorded a 10-point decrease, unemployment is considered the main obstacle to the economy by 39% of respondents (from 49% in 2020). On the other hand, the current economic situation is considered the most detrimental challenge by 47% of the Western Balkans. Corruption is again ranked third with 27%. Emigration is seen as a negative and worryingly increasing trend, as 18% of participants were concerned with its consequences for their economies (from 13% in 2020). Meanwhile, the number of respondents anxious over the health system has slightly decreased at regional level (15%, from 17% in 2020). In addition, political disputes in the region seem to be an incremental concern, as some 11% were worried about the negative impact these might have.

Albania (59%) and North Macedonia (57%) perceive economic situation as the most detrimental challenge, while unemployment remains the most prevailing obstacle for Montenegro (51%) and Kosovo* (48%). Montenegro and Kosovo* in particular share a high degree of anxiety over both unemployment and economic situation (41% and 40% respectively), while economic development is perceived the most important problem in the economy by Serbia (46%) and Bosnia and Herzegovina (41%). While on average one-fourth of the Western Balkans' population is anxious over corruption, Serbia leads the region with the most worried citizens (28%). With one-third of Albania's population having emigrated only during 1990-2015, and with the same trend continuing up to these days, 29% of its population believed that brain drain is an important challenging issue that their economy is facing. Bosnia and Herzegovina (21%) and North Macedonia (20%) share a similar concern. Kosovo* is the region's most preoccupied economy about the education system, with 18% of respondents believing that better quality education would translate its benefits to the economy.

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

(All respondents, N=6029, maximum two answers, share of total, %)



The Western Balkan economies jointly perceive inadequate employment opportunities as the most pressing challenge for the young generation, 63%. With roughly 21% of the Western Balkans' population being under 24 on one hand[3], and with 33% of youth unemployment rate in the region[4], respective governments should actively engage in employment policies and measures, with a special focus on youth.

Though 17% of respondents view lack of access to education as the main impediment, 12% think that youth in decision-making process should be given priority and 8% believe that health issues represent a significant challenge that requires immediate government's attention, all three categories fall way behind the unemployment, but striving for solutions.

Speaking of individual economies, Montenegro is once again the region's most dissatisfied economy (76%) with employment opportunities for young people, followed by Albania (67%). Worryingly enough, the number of young people in Montenegro who find it difficult to find a job has spiked by 7 points (from 69% in 2020). Kosovo* (57%) recorded a 10-point increment in the number of residents preoccupied with inadequate employment opportunities and yet, together with North Macedonia (57%) are the least worried economies on the issues.

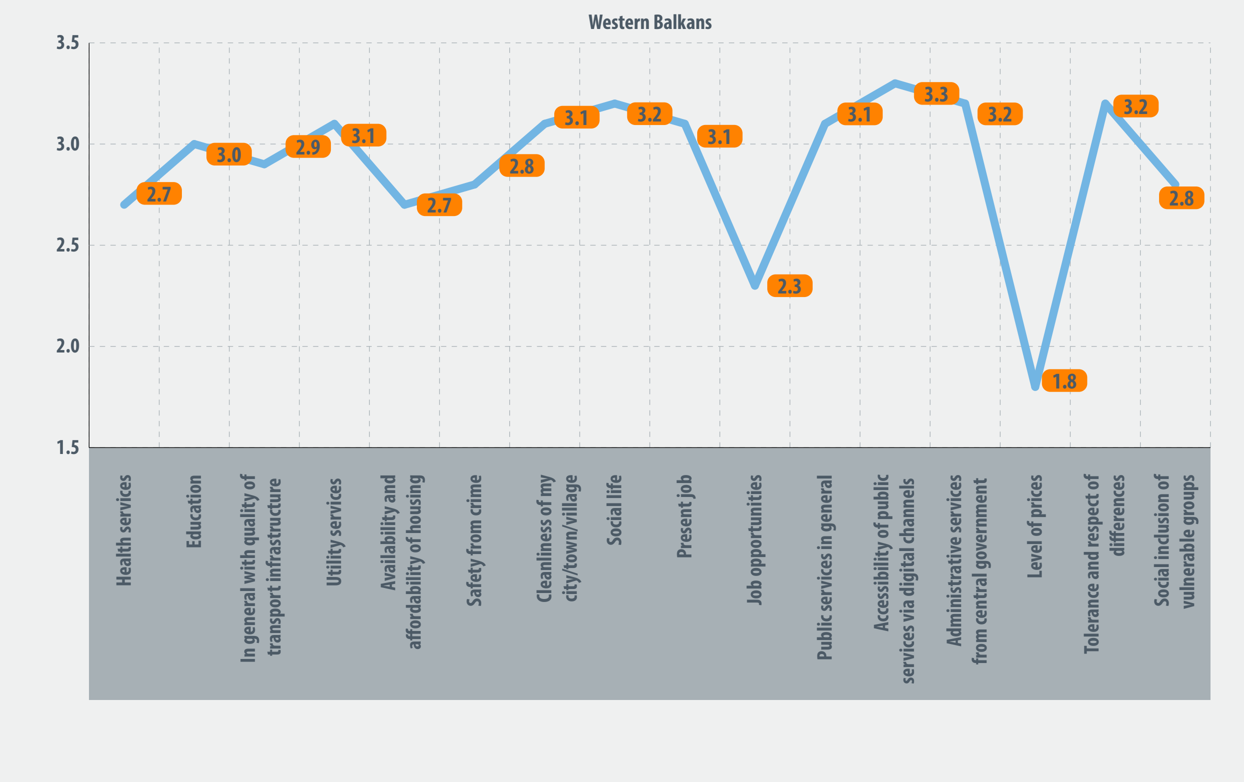
Once again, Kosovo* considers the education system a serious problem, not only for its economy but for the youth as well. One third of survey participants in Kosovo* (33%) believe that the disparity to education opportunities for the youth requires immediate attention. While youth health issues don't seem to be a pressing issue for now, Albania (12%) and North Macedonia (12%) recorded an increase in the citizens' awareness of depression and drug addiction's impact on the youth.

3 Western Balkans Youth Lab Project, (2020), *It's time to change, time to act-time for youth*, https://www.rcc.int/priority_areas/48/western-balkans-youth-lab-project.

4 RCC ESAP 2 Observatory on employment in the Western Balkans https://www.esap.online/observatory/home#annually-indicators/

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=6029, single answer, scale from 1 to 5, mean)



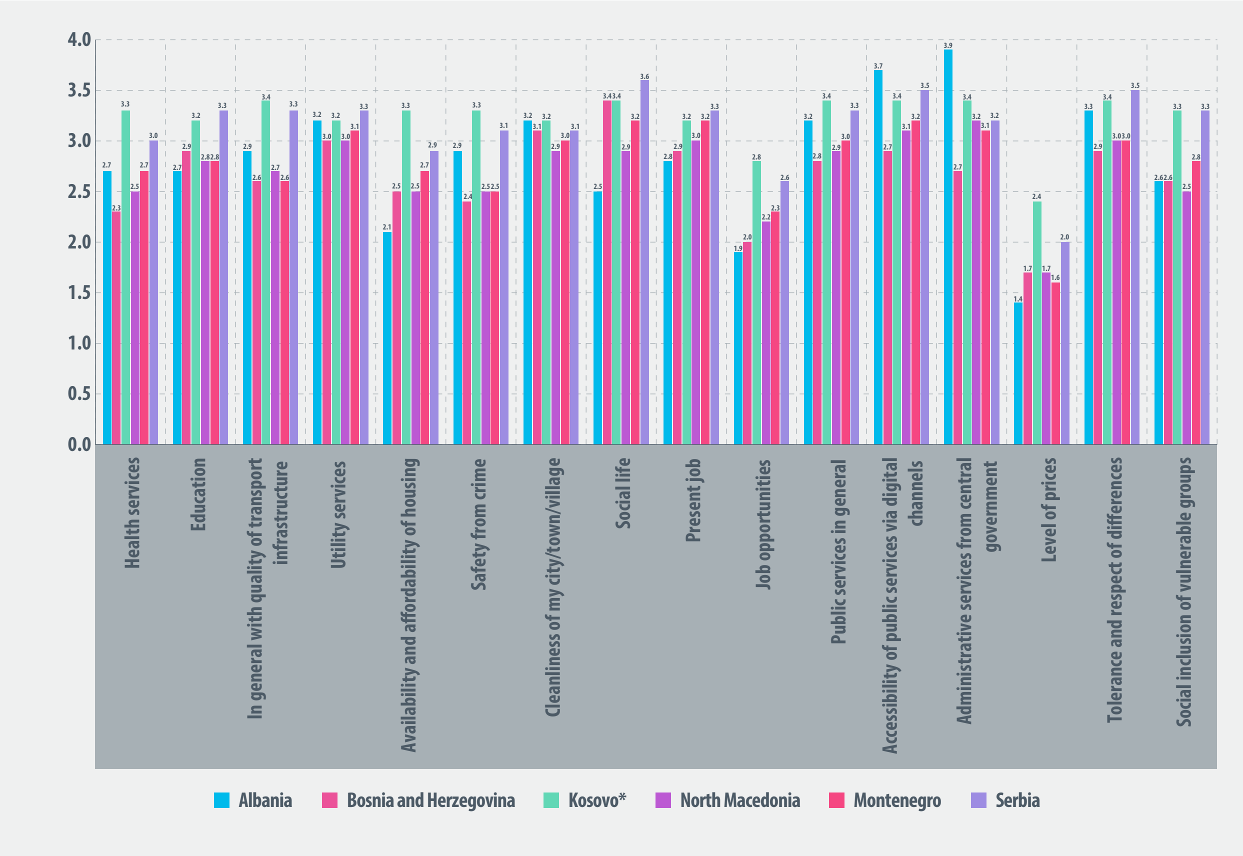
At the regional level, data indicate a notable improvement in public services compared to the previous barometer cycle. While respondents expressed an above average satisfaction level for most public services, a mean of 3.1 out of a 5-point scale, the same cannot be said about the current level of prices and job opportunities. The lowest wages in Europe on one hand, and the rapid increase in the cost of living on the other, translated into a low level of satisfaction with current prices, thus scoring only 1.8 points out of 5. Reflected in previous graphs, the lack of job opportunities also remains a concern at worryingly high levels for most of the Western Balkans regardless of age, with a 2.3-point score-out of 5. Public services in general represent the other side of the coin.

Digitalisation, a global revolution in the modern era, seems to have facilitated citizens' accessibility to public services, as the Western Balkans' satisfaction rate with their governments' online services has incremented by 0.2 points, thus scoring a level of 3.3 of satisfaction. Satisfaction with administrative services from central governments (3.2), social life (3.2) and tolerance towards different groups (3.2) fall 0.1 point behind the accessibility to online public services, while public services in general, utility services, present job and cleanliness of the city stand at 3.1 points out of 5. Health services (2.7) and education (3.0) were positively evaluated by respondents, though results may reflect great disparities of satisfaction level among economies.

Interestingly enough, data reveal an increasing trend of: the number of respondents who claim to be satisfied with their social life; current jobs and the level of tolerance towards differences, thus indicating that the social dimension is being considered an important component of wellbeing among the Western Balkan society.

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=6029, single answer, scale from 1 to 5, mean)



In individual terms, all economies without exception showed an above average satisfaction with given services and sectors.

While results indicate a tight difference between Serbia and Kosovo*, Kosovo* managed to snatch the trophy of the most satisfied economy with general wellbeing, as it scored a mean satisfaction of 3.3 in a 5-point scale, immediately followed by Serbia (3.2). At the other end of the scale stand Bosnia and Herzegovina (2.7) and North Macedonia (2.7), barely overpassing the average level of citizens' satisfaction with specific services. Albania and Montenegro stand somewhere in between, with neither thrilled nor disappointed citizens.

Participants from Albania are the happiest with administrative services from central governments (3.9) and with the online accessibility of public services (3.7), while the high level of prices (1.4), job opportunities (1.9) and affordability of housing (2.1) represent the other side of the same coin. A similar result was found in Serbia, with respondents being most happy with their social interaction (3.3). Easy accessibility of public services through digitalisation (3.5) and the tolerance towards diversity (3.5) were also highly ranked.

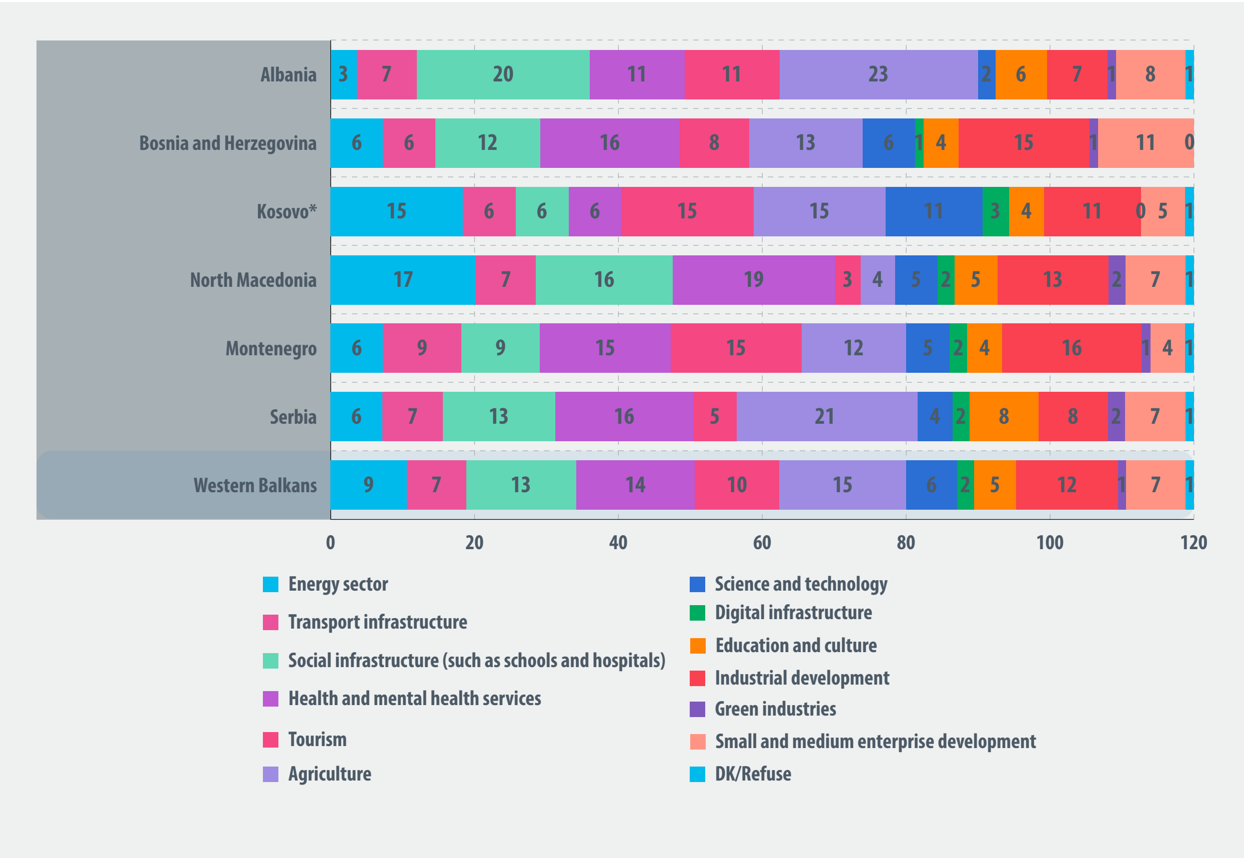
Meanwhile, though with a quantity difference to their counterparts in Albania, participants from Serbia were also dissatisfied with job opportunities (2.6) and the level of prices in general (2.0). Survey participants in Montenegro found their social lives and present jobs at satisfactory level, while high prices (1.6) and job opportunities (2.3) remain great concerns for the population. Participants from North Macedonia were in general more reluctant. They were most satisfied with governmental services (3.2) and the online use of public services (3.1), while the level of prices (1.7) and job opportunities were ranked the lowest. Bosnia and Herzegovina scored better in the social dimension (3.1) and satisfaction with the city's cleanliness (3.1), while participants complained of high prices (1.7) and low level of job opportunities.

Kosovo*, the region's most satisfied economy with general wellbeing, was the most content with public services in general, online public services and central government facilities (3.4), while respondents were not very happy with the current level of prices (2.4).

As mentioned in previous results, unemployment in general remains a regional concern and with an incremental trend of increased prices, this should be taken seriously into consideration by public authorities.

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

(All respondents, N=6029, single answer, share of total, %)



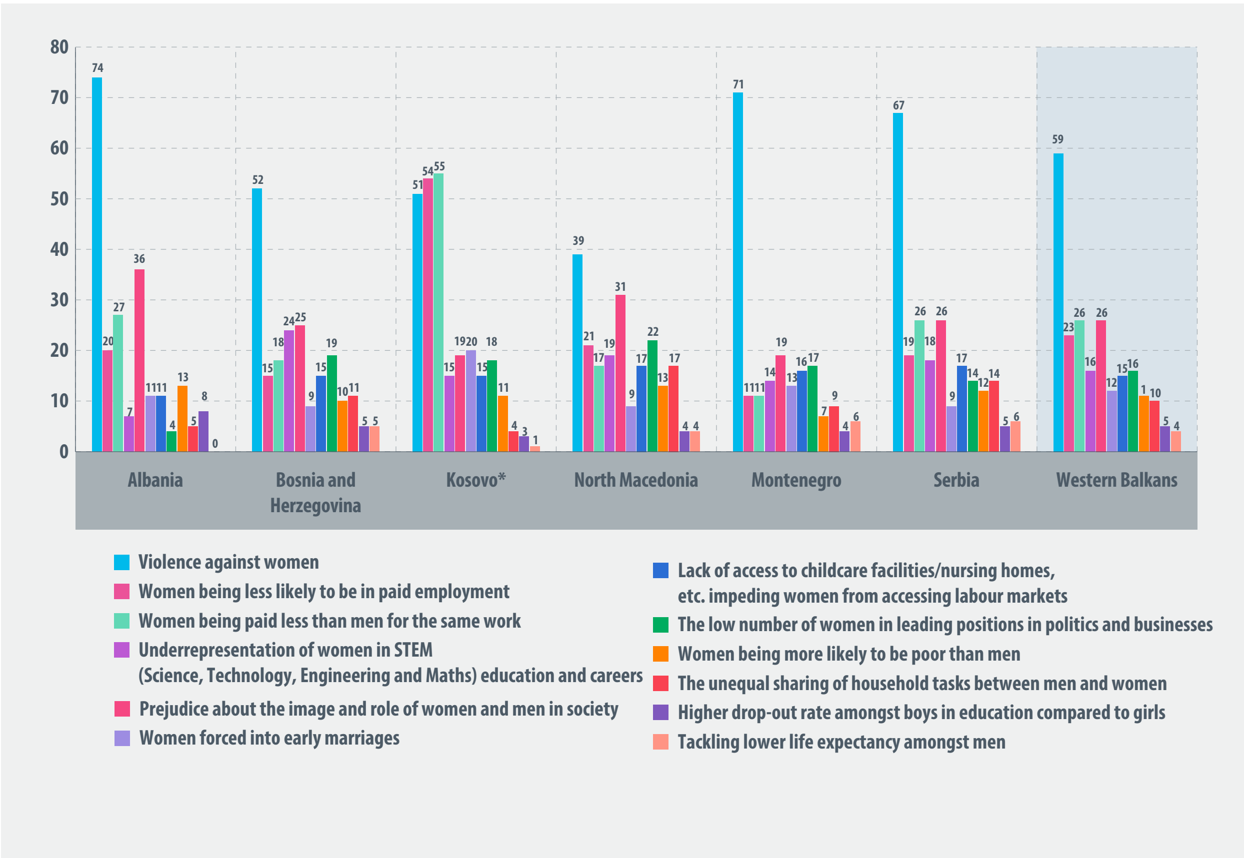
Results from this cycle of Barometer show once again that government investment is of crucial importance for economic growth. While public awareness of the importance of investments in different sectors follows an upward trend, their perception on which sectors should be prioritised for investments by the government differ. Contrary to the previous barometer, which mostly (46%) underlined the need for governmental funds to build schools, hospitals etc., this cycle recorded answers almost equally distributed among sectors. Since agriculture is one of the main contributors to GDP for most of the Western Balkan economies, 15% of respondents believed that it requires immediate attention.

On the other hand, due to COVID-19 severe consequences for the health sector, it was very common that respondents in the region (14%) would think that health and mental health services should be given priority for investment. Industrial development has increasingly been seen as a sector with great potential in the region, and 12% of respondents believed that governments should heavily invest in it. Social infrastructure, transport infrastructure and energy sector were considered important departments for investment by 13%, 7% and 9% respectively, while education was considered the least prioritised sector for potential governmental funds (5%).

Speaking at economy level, Albania (23%) is the most proponent economy for investment in agriculture, as agriculture is one of the main sectors of its economy and in 2020 it contributed to 19% of Albania's total GDP[5]. Second most forceful cheerleader for agricultural investment is Serbia (21%). Albania also prioritised social infrastructure compared to other economies (20%). Respondents from Kosovo* (15%) and North Macedonia (17%) welcomed potential governmental investments in the energy sector, while those polled in Montenegro mainly supported funds in tourism (15%) and industrial development. 16% of respondents from Bosnia and Herzegovina considered health services a top priority for investment while 15% believed that more resources should be invested in the industrial development sector.

Figure 18: I will read you a list of inequalities which men or women can face. In your opinion, which area should be dealt with most urgently in your economy?

(All respondents, N=6029, maximum 3 (three) answers, share of total, %)



5 Aaron O'Neill (2022): *Distribution of gross domestic product (GDP) across economic sectors Albania 2020*, https://www.statista.com/statistics/444090/albania-gdp-distribution-across-economic-sectors/.

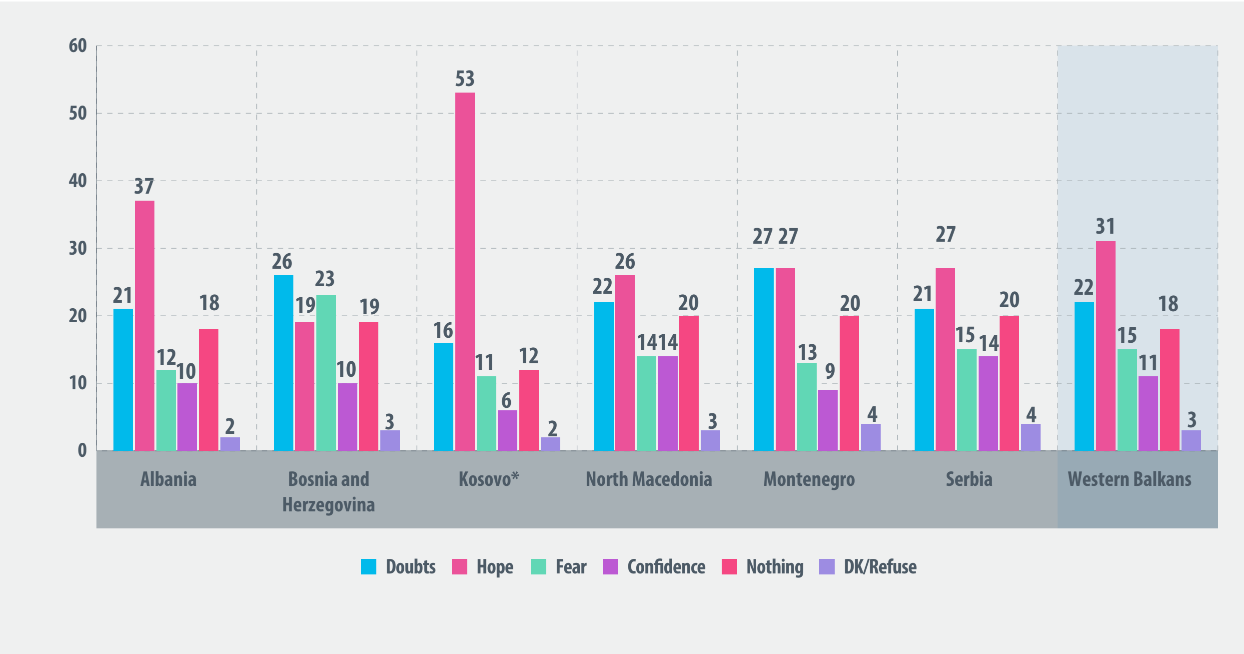
Unfortunately, violence against women remains a big concern by respondents in the region, though it recorded a 6-point contraction (59% from 65% in 2020). Prejudice about gender roles in society is again the second most prevalent concern, reaching 26% and ranks third, same as inequality in remuneration between men and women with 26%.

Albania outran Kosovo* in terms of respondents' concerns over gender-based violence (74%), followed by Montenegro (71%). With the exception of North Macedonia (39%), more than half of respondents from all other economies considered violence against women a matter of urgency. Kosovo* on the other hand, the former most concerned economy over gender-based violence, is still the most preoccupied with women being less paid for the same work (55%) and with women being less likely to be paid in employment (54%) in the region. The prejudice about the role of women in the society was mostly underlined by respondents from Albania (36%) and North Macedonia (31%).

In the meantime, 16% of Western Balkan respondents flagged the low representation of women in leading positions in politics and businesses, and only 10% address the unequal sharing of household tasks based on gender. Though a downward trend, forced marriage is still perceived as a regional concern that should be dealt with urgently (12%).

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

(All respondents, N=6029, single answer, share of total, %)

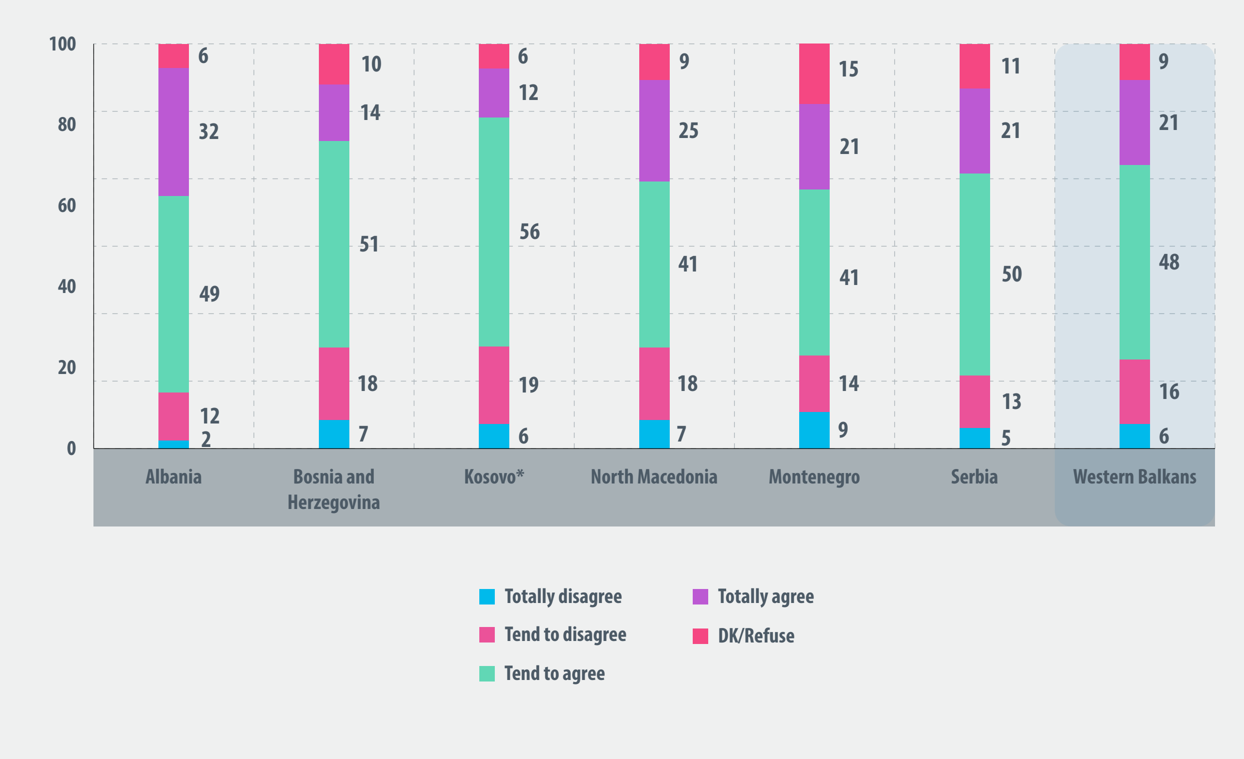


Fortunately, findings note an increase of positive feelings, especially on 'hope', related to the region. While in 2020, 36% of respondents associated positive feelings with the Western Balkans, this number has incremented by 6 points. On the other hand, yet some 37% of the citizens have negative reaction – doubt or fear – to it. Meanwhile, 18% harbour no feelings for the Western Balkans.

Speaking in individual terms, Kosovo*'s hope and confidence in the region have spiked, with 59% of respondents feeling positive. Though with an accumulated increase of 10 points, in this cycle Albania (47%) is the second most hopeful and confident economy. Bosnia and Herzegovina once again is the region's least likely economy to associate with positive feelings, with roughly half of respondents nurturing doubts and fear (49%) about the Western Balkans.

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

(All respondents, N=6029, single answer, scale from 1 to 4, share of total, %)



The sentiment of solidarity pervades the Western Balkans, with more than two-thirds (69%) of respondents focusing on what brings the region together rather than drives it apart (from 29% in 2020). This indicates the increasing positive trend for a greater sense of shared belonging.

Albania is the region's most likely economy to recognise ties among region's economies, with a remarkable 81% of participants highlighting their bond with the Western Balkans. Serbia (71%), Kosovo* (68%), North Macedonia (66%) and Bosnia and Herzegovina (65%) also share the sense of regional similarities within the Western Balkans. On the other hand, Montenegro (62%) though with no great difference from her sister economies, fell last in the list of those recognising the pulling factors of similarities within the region. The average number of respondents who expressed no interest in answering this question reached 9%.

PERCEPTIONS ON SECURITY

The illegal possession and misuse of weapons has an impact on security- related perceptions. At regional level, respondents who didn't feel threatened at all outran those who feel threatened (33%) and extremely at risk (12%). At economy level, participants from Montenegro (62%) and Serbia (61%) led the list of the most secure-perceived economies, while Bosnia and Herzegovina (56%) is the jurisdiction with the highest percentage of respondents feeling threatened by illegal possession and misuse of firearms.

Unemployment is generally considered (53%) the main factor contributing to radicalisation and violent extremism. Though four Western Balkan economies fear that unemployment will contribute to these phenomena, Montenegro (57%) and Serbia (63%) considered propaganda as the most contributing element.

Figure 21: Which factors do you think contribute the most to radicalisation and violent extremism in your economy today?[6]

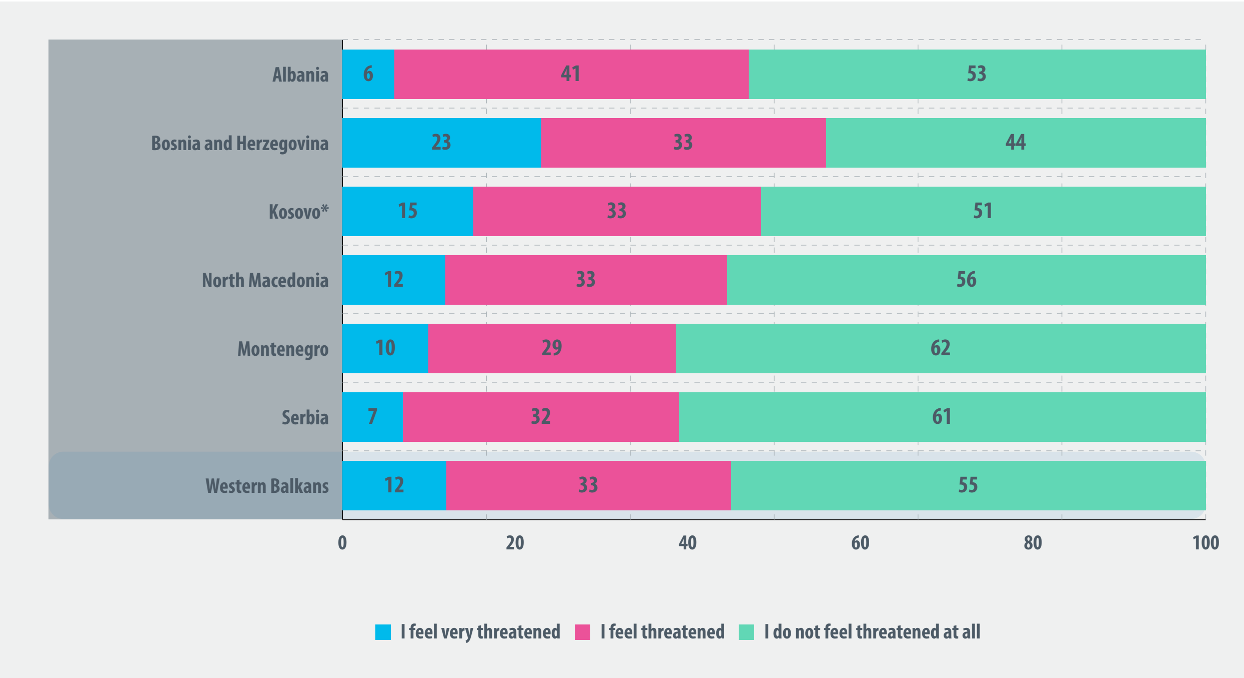
(All respondents, N=6029, multiple answers, share of total, %)

6 Methodological note: Discrepancies noted between Balkan Barometer and SecuriMeter as regards to some security-related questions result from the different Sample Structure and Methodology approach used by the respective surveys.

Furthermore, 44% of respondents believe that weakness of state and social security institutions negatively affects the efforts to curb radicalisation and violent extremism, suggesting that strengthening these institutions could improve the situation in that regard. On the other hand, 39% of respondents felt that social media is a potential source for radicalisation to violent extremism.

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

(All respondents, N=6029, single answer, share of total, %)



Findings indicate a swift shift in terms of security-perceptions caused by the illegal possession/ use of weapons in their neighbourhoods. Data indicates that citizens in the region are quite divided over risks that illegally owned weapons pose on their security. While the majority of respondents in the region (55%) do not feel threatened by illegal possession and misuse of weapons in their neighbourhoods, significant share of respondents (45%) feels threatened to certain extent (35% threatened and 12% very threatened).

At economy level, respondents from Montenegro (62%) and Serbia (61%) were the most likely not to feel threatened by risks associated with firearms, followed by North Macedonia (56%), Albania (53%) and Kosovo* (51%). Bosnia and Herzegovina is the jurisdiction with the highest percentage of respondents feeling threatened by the illegal possession and misuse of firearms (56%).

Compared to 2021, share of respondents who said they do not feel threatened increased slightly - from 49% to 55%. Such increase was recorded in each economy in the Western Balkans, except for Montenegro where a minor decrease was documented (1%).

ATTITUDES ON REGIONAL COOPERATION AND EU INTEGRATION

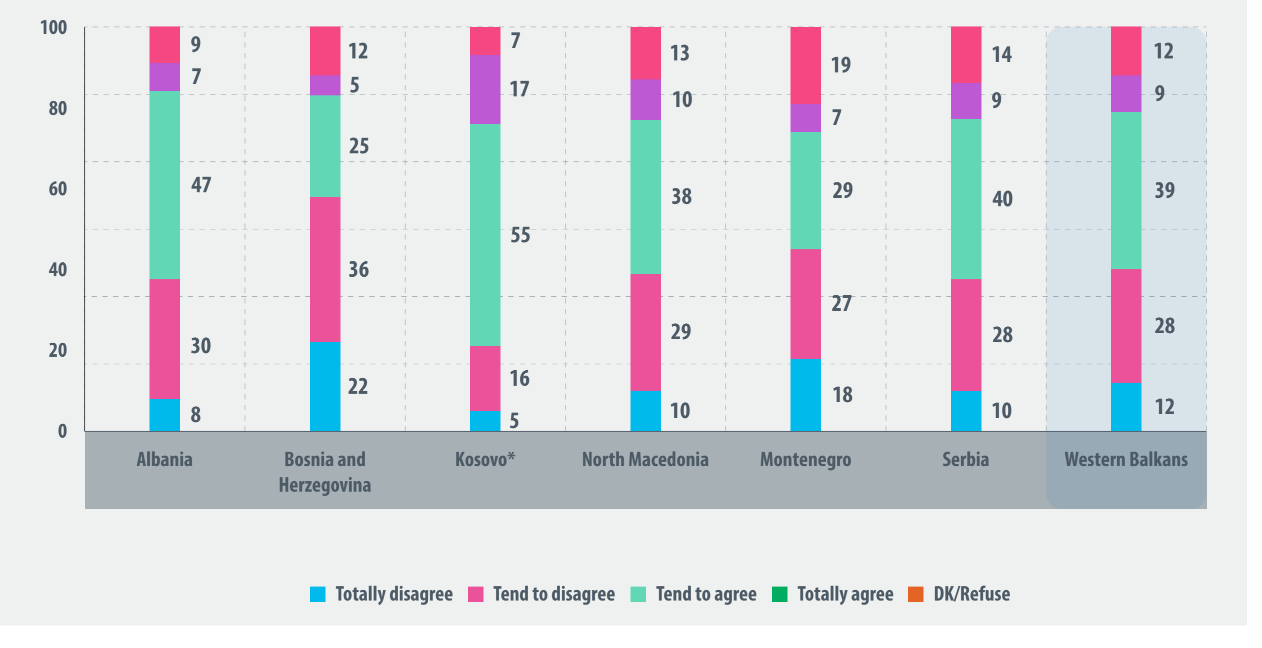
A sentiment of positivity pervades the Western Balkans in terms of regional relations, as 48% of participants noticed improvement, an encouraging increase in the public's positive assessment. In contrast, 40% testified to negative feelings. Though the number of respondents who have a negative perception of regional relations significantly contracted, the scepticism that any improvement took place can still be noted in the region. Bosnia and Herzegovina is the epitome of citizens' continuous reluctance in assessing regional relations as having an improving trend.

The vast majority of citizens in the Western Balkans (76%) saw a positive correlation between regional cooperation and better political, security and economic situation. The percentage of respondents sceptical with regard to the positive socio-economic and political impact of regional cooperation remains at relatively low levels, with 18% claiming that they do not agree that cooperation would lead to improvement.

Joining the EU membership remains a predominant sentiment across the region, with 60% endorsing accession. While, in general, the Western Balkan economies believe that EU membership would bring considerable benefits, the number of respondents who expect EU integration by 2025 has further subtracted (22% from 24% in 2020 and 28% in 2019). However, the EU accession is considered a mere velleity rather than a realistic scenario by an incrementing share of citizens, as 28% were very sceptical. 37% others believed that their economies would join the EU by 2030 the latest.

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

(All respondents, N=6029, single answer, scale from 1 to 4, share of total, %)

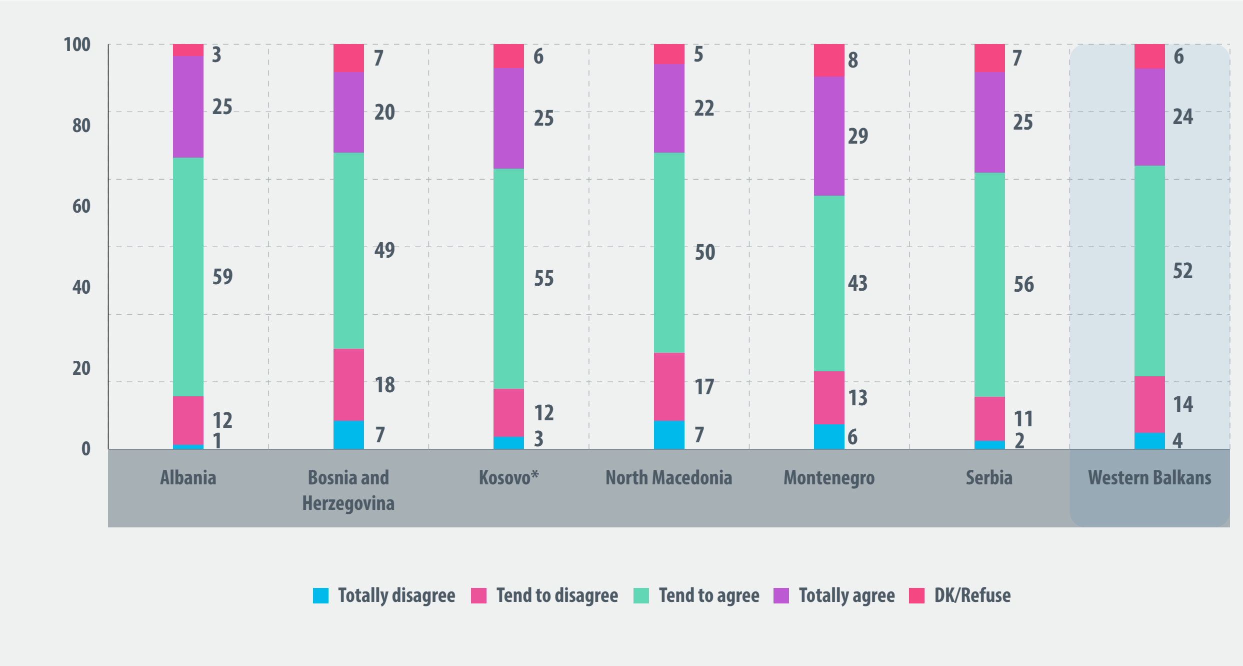


Seeing regional relations from individual lenses, Kosovo* is the economy experiencing an improvement compared to the previous 12 months, with 72% of population sharing a positive attitude. On the other hand, Bosnia and Herzegovina is this cycle's most negative judge, as 58% believed that regional relations deteriorated. Albania, North Macedonia and Serbia tend to view their current intra-regional relations with more optimism, while one-fifth of respondents from Montenegro (19%) noted no progress whatsoever.

After last year's negative rating on regional relations, an encouraging increase in the positive assessment of respondents has been registered. Despite the overall negative perception about regional relations being significantly contracted (by 18 points), at economy level, however, citizens are still reluctant to acknowledge that any notable improvement took place. Bosnia and Herzegovina is a typical example of citizens' continuous scepticism on regional relations.

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

(All respondents, N=6029, single answer, scale from 1 to 4, share of total, %)



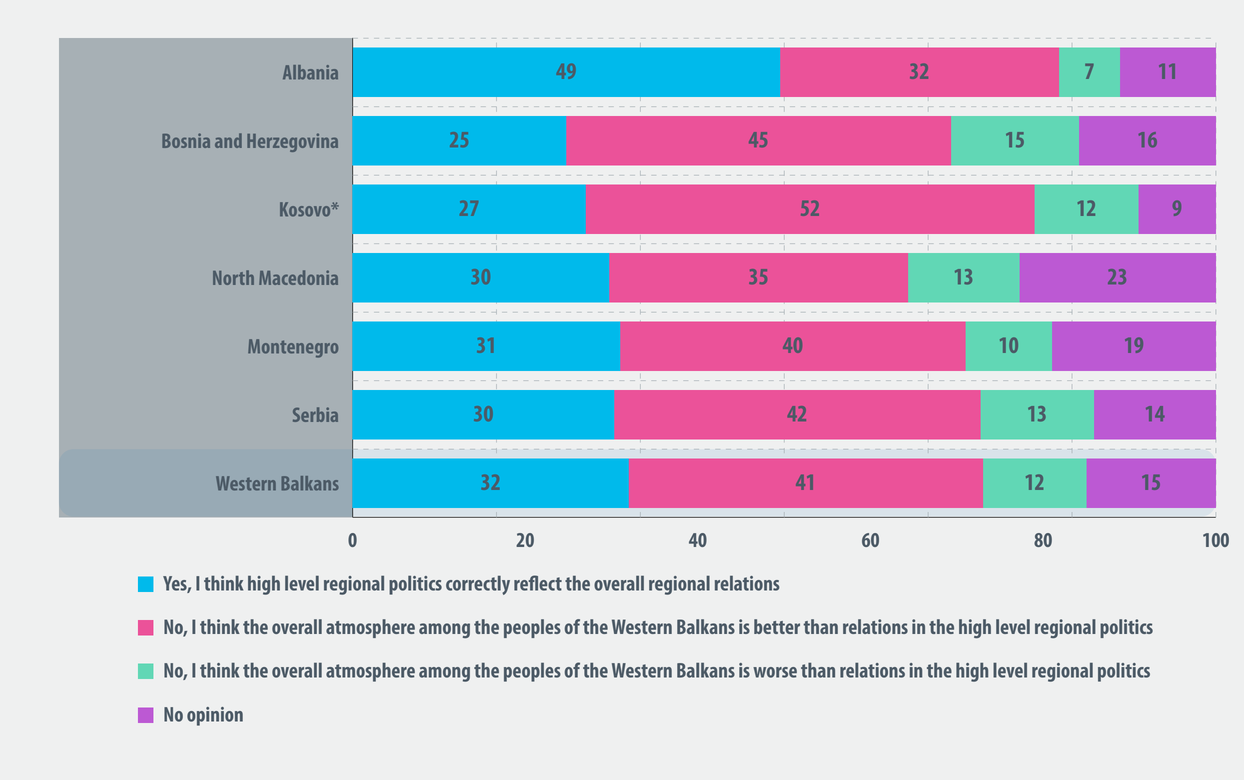
The vast majority of citizens in the Western Balkans (76%) acknowledged the positive correlation between regional cooperation and better political, security and economic situation. The percentage of respondents sceptical of the benefits of regional cooperation remains at relatively low levels, with 18% claiming that they do not see any impact of intra-regional relations into daily politics and socio-economic improvement.

84% of Albania's citizens were appreciative of the role played by regional cooperation, followed by Serbia (with 81%) and Kosovo* (with 80%). Participants from Bosnia and Herzegovina were less confident that better regional relations translate into a better economic, political and security situation, though two-thirds (69%) believed it has an impact. 72% of respondents from North Macedonia and Montenegro saw regional cooperation as a catalyser of their domestic political/economic/security situation.

On the other side of the coin, Bosnia and Herzegovina (25%) is home to the highest share of residents who were reserved regarding regional cooperation's benefits to the socio-economic, political and security situation, thus making up one-fourth of the entire population.

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

(All respondents, N=6029, single answer, share of total, %)



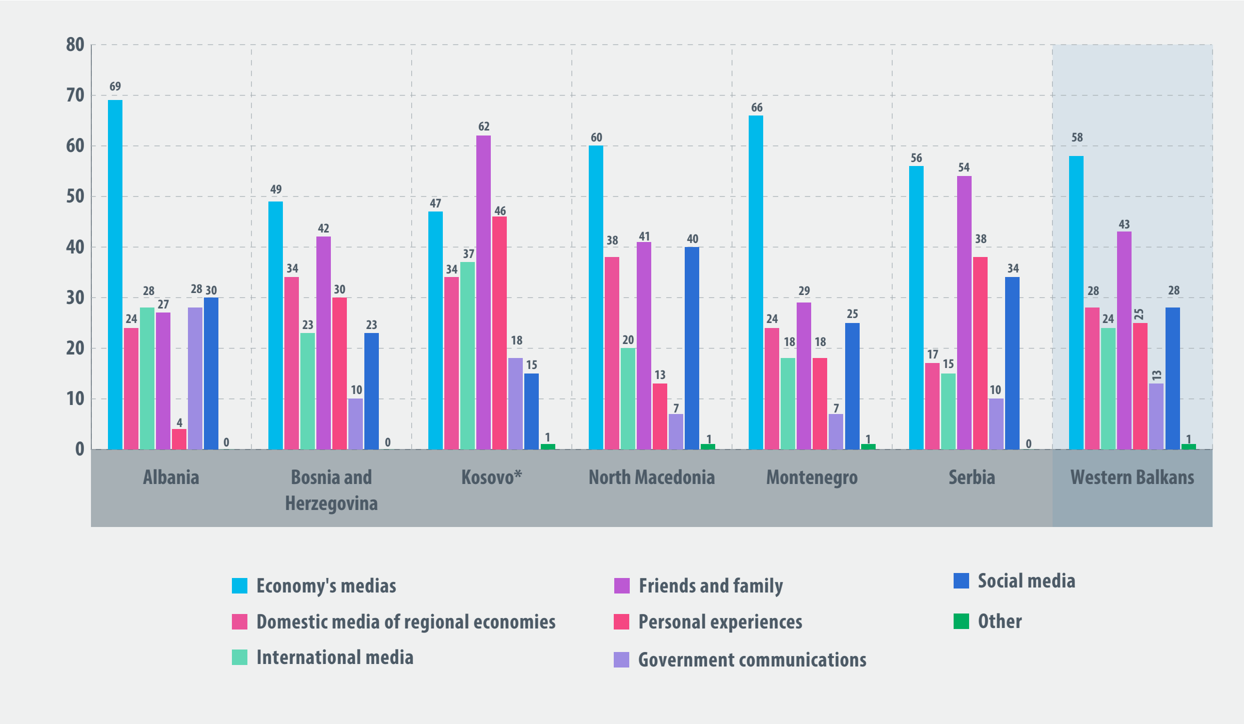
In a region with dynamic relations among economies, the public sentiment on regional situation is not always reflected by the high-level political relations. In other words, an increasing number of respondents – over (41%) share a more positive outlook on the overall atmosphere compared to relations portrayed at the political level. Roughly one-third of respondents believed that the high-level politics reflects exactly how the relations stand among the peoples within the region. At the other end, 12% believe that relations among peoples are actually worse. Overall, it seems like at regional level, respondents tend to view their relations through more optimistic lenses compared to bilateral or regional relations at political level.

In individual terms, Kosovo* (52%) shelters the highest number of participants who tend to believe that the regional situation is notably better compared to the high-level political relationships among economies. Bosnia and Herzegovina (45%) and Serbia (42%) share a similar perception, though to a lower extent. Bosnia and Herzegovina mirrors an ambiguous image when it comes to public sentiment, as it also is the region's most sceptical economy, with 15% of respondents believing that the situation among the peoples is actually worse than what is presented by politics. For the second time, Albania's respondents (49%) stand out from the crowd in terms of considering the regional politics equally reflecting regional affairs.

Results show that two economies having political disputes such as Kosovo* and Serbia share similar attitudes on the current regional situation, thus believing that relations in the region are actually better than they are perceived through the political filter. Some 23% of residents from North Macedonia, however had no opinion on the issue.

Figure 26: What are the key sources of information which shape your opinion on the rest of the Western Balkan region?

(All respondents, N=6029, multiple answers, %)



While information is widely used in the way how we shape our opinions, the extent to which that information impacts its reader largely depends on the source. Regionally speaking, the share of citizens who seek for information in domestic media of home economies has spiked (58%), thereby ranking it as the most common channel. With the societies in the region sharing collectivism as a common cultural dimension[7], most of residents (43%) admitted that family and friends play a big part on how their critical thinking is shaped. Interestingly enough, social media and domestic media represent two other channels widely used by participants (28% for each), while 25% claimed that their own experience plays a major part in their way of thinking. The utility of governmental channels of communication has decreased, with 13% of respondents finding them to be their preferred source of information.

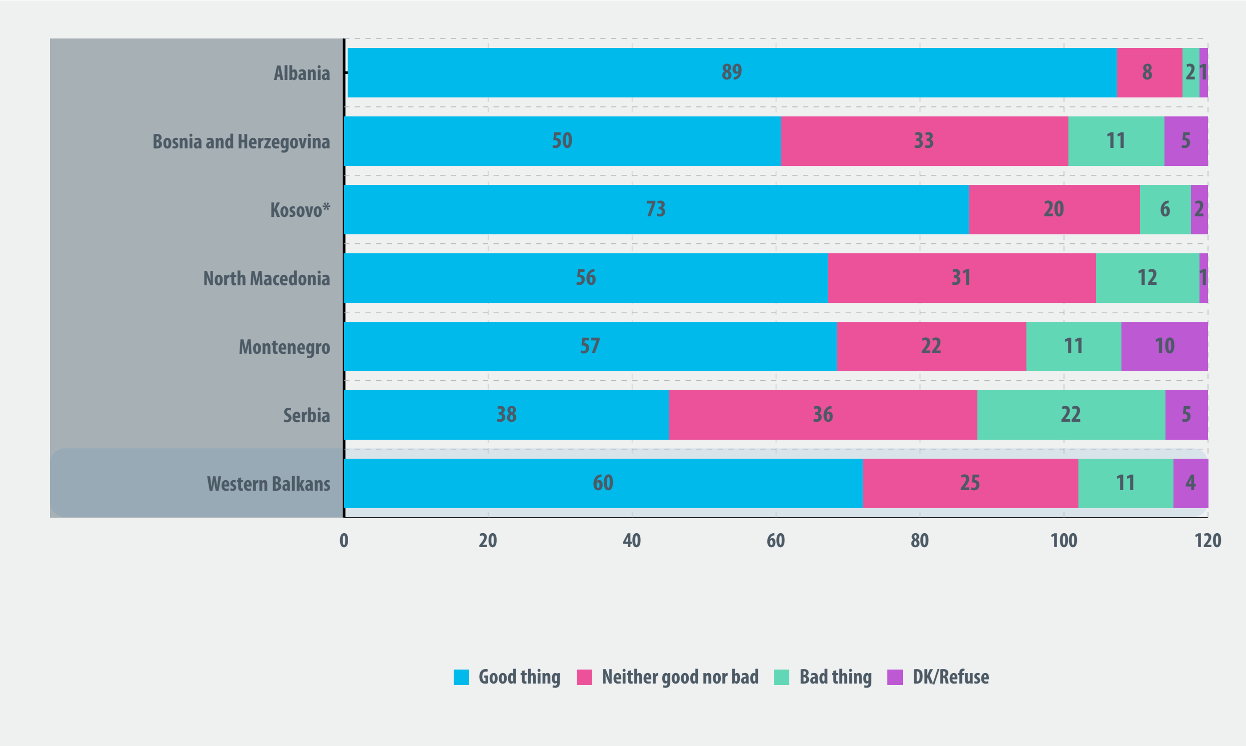
In terms of individual economies, most of residents in Albania and (69%) and Montenegro (66%) tend to use domestic media for getting information, while Kosovo* (62%) and Serbia (54%) consider most important information coming from the circle of family or friends.

7 Geert Hofstede, (1984): *Culture's Consequences*, https://www.hofstede-insights.com/country-comparison/albania,bosnia-and-herzegovina,north-macedonia,serbia/.

Economy's media and friends and family remain a common source of information for most participants from Bosnia and Herzegovina (49% and 42%, respectively) as well as North Macedonia (60% and 41%, respectively). Interestingly, government communication fluctuated between two extremes: while roughly one-third of those polled in Albania (28%) used it as a source, the same has an irrelevant impact on how those in North Macedonia and Montenegro shape their opinions (7%).

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

(All respondents, N=6029, single answer, share of total, %)



Confidence in the benefits of joining the EU membership remains a predominant sentiment across the region, with 60% considering that accession would bring positive change. At the same time, the number of negative responses has also increased, albeit by only 3 points (11% from 8% in 2020), which is the highest score registered for this category throughout the years. The number of those finding EU membership neither a good nor a bad thing, on the other hand, comprised one-fourth of respondents.

89% of respondents from Albania, the economy which is on the verge of formally opening negotiations for EU accession[8], firmly believe that joining the EU will translate into multidimensional development. Controversially enough, Kosovo*, one of the only two economies who are not official candidates for EU accession[9], is the biggest believer in the positive impact of EU membership, with 73% of respondents believing that Kosovo*'s accession to the EU is a positive step. 50% of their counterparts in Bosnia and Herzegovina share the same positive attitude.

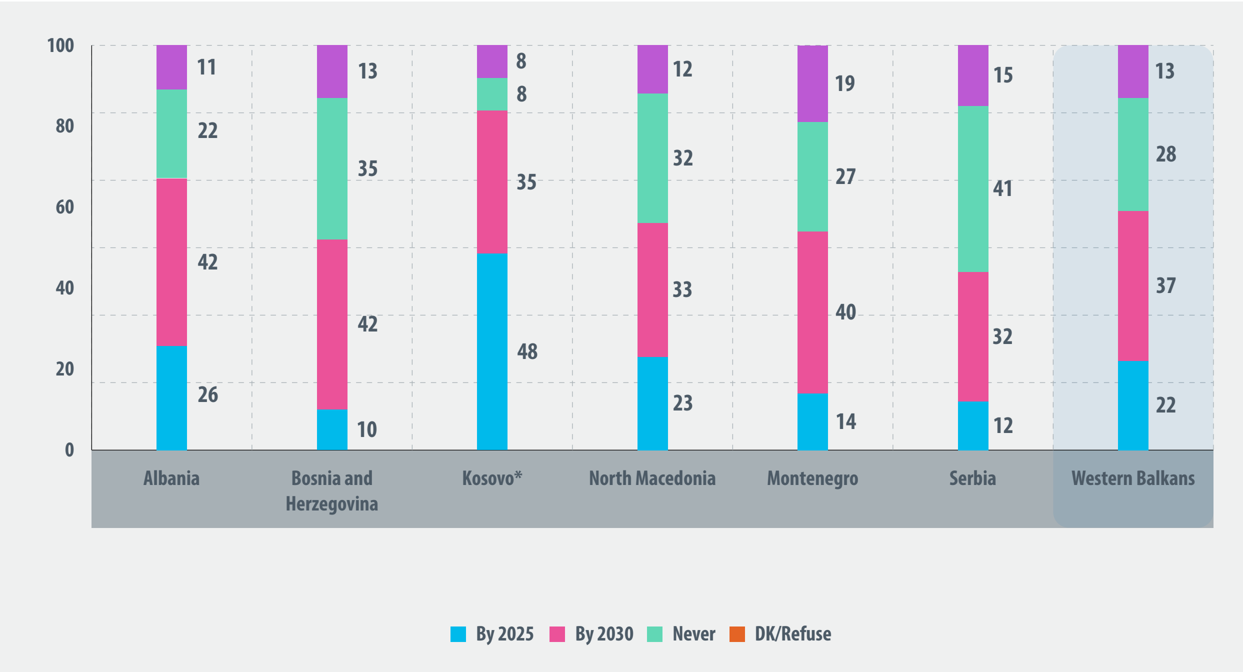
8 European Commission, (2020): *Opening of accession talks with Albania and North Macedonia*, https://ec.europa.eu/commission/presscorner/detail/pt/ip_20_519.

9 European Commission, (2021): *Candidate countries and potential candidate countries*, https://ec.europa.eu/environment/enlarg/candidates.htm.

Serbia once again is the only economy where the EU accession is not viewed in such a positive light, with only 38% of respondents seeing benefits in their economy's potential EU membership and 22% arguing that joining the EU would unravel consequences for their economy. The biased sentiment over Serbia's EU membership is further highlighted by the 36% of respondents who claimed no significant difference whatsoever in case their economy becomes an EU member. On the other hand, 57% of those polled in Montenegro and 56% of those in North Macedonia perceive EU accession as a positive development, while 33% in Bosnia and Herzegovina do not associate it with either a positive or a negative change.

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

(All respondents, N=6029, single answer, share of total, %)



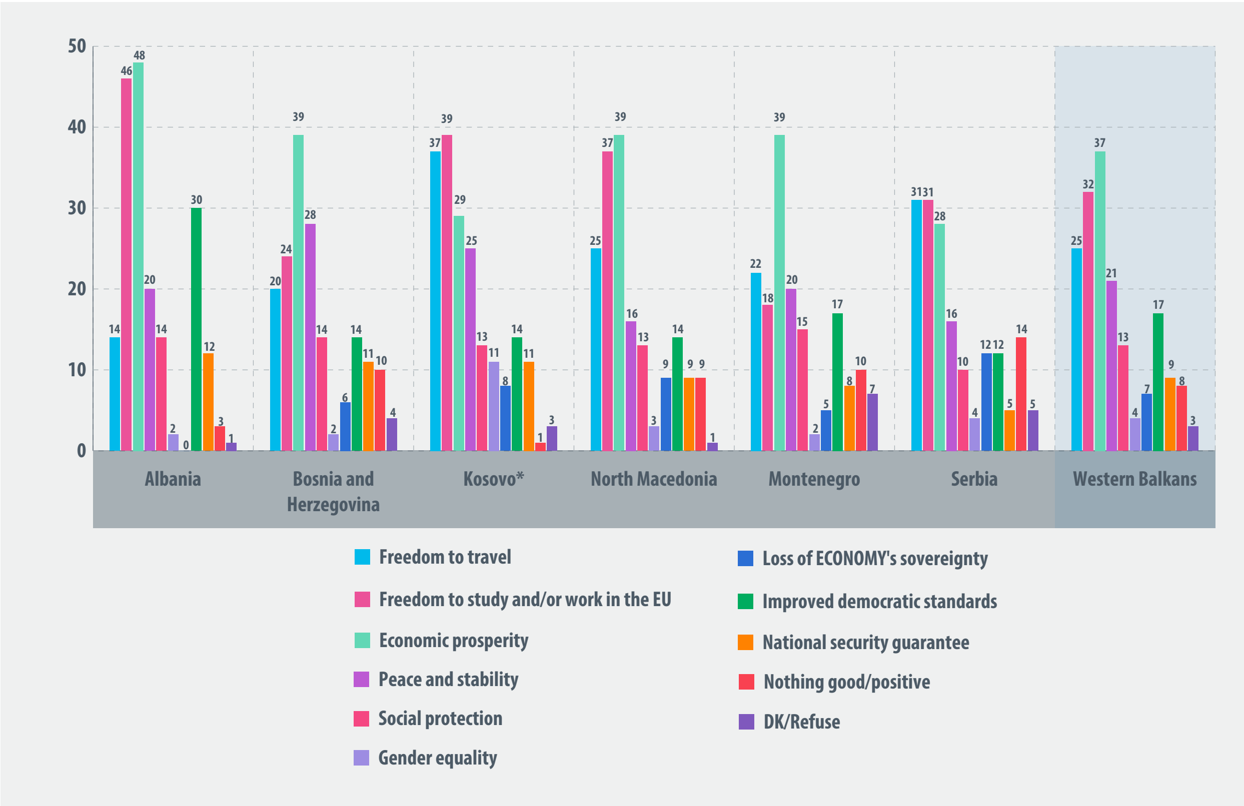
While in general the Western Balkan economies are enthusiasts for EU membership, the share of respondents who expect EU integration by 2025 has further subtracted (22% from 24% in 2020 and 28% in 2019), thus indicating a more sober outlook on the region's EU accession prospects. Moreover, the number of participants who consider EU accession a mere velleity rather than a realistic scenario is continuously rising, with 28% being very sceptical. While 22% of respondents expressed the expectation that their economies would join the EU by 2025, 37% believed that 2030 is the last deadline for EU integration.

From the lenses of individual economies, almost half of the population in Kosovo* (48%) believed that their economy would fully integrate into the EU, even though their economy is not an official candidate yet. Bosnia and Herzegovina (10%) and Serbia (12%) are home to the lowest concentration respondents who consider the EU accession possible within 2025, and at the same time respondents in Bosnia and Herzegovina (35%) and in Serbia (41%) doubt the most that integration in the EU will happen at all.

North Macedonia is divided between two major groups: while a group of residents (33%) hope that their EU accession negotiation will open soon and their economy's European perspective will be finalised by the end of 2030, another third of their counterparts (32%) think that the EU accession is not likely to happen. Residents in Montenegro, on the other hand, mostly believe that their economy's European path will successfully conclude by 2030. In this cycle of the Barometer, respondents in Albania were more reserved in their hopes that EU integration would happen by 2025 and rather believed that 2030 was a realistic target. While 26% (from 39% in 2020) saw their economy in the EU by 2025, 42% (from 40% in 2020) would argue that Albania's accession to the EU would happen in 2030, the latest.

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

(All respondents, N=6029, maximum 2 (two) answers, share of total, %)



This cycle of Barometer reflects similar findings on citizens' subjective associations with EU membership compared to previous years. Economic prosperity remains the most important association with the EU, with 37% of the entire population believing that joining the EU will benefit their economies in terms of economic growth. With previous findings flagging job opportunities in the Western Balkans as the most persistent challenge, 32% of them personally associated EU integration with the freedom to work there. Freedom to travel (25%) was also one of two benefits associated the most with the EU, albeit it recorded a significant decline by 25 points, compared to the 50% of the previous year. This fall might be explained by the travel restrictions linked with the pandemic situation.

Peace and stability (21%) are again positioned fourth, albeit 13% less respondents perceived it as a key benefit from EU accession. Respondents who perceive EU integration as a threat to their economy's sovereignty reached 7% while a rising percentage of 8% claimed to see nothing positive arising from EU membership.

Albania (48%) leads the region when it comes to considering economic prosperity a positive outcome of the EU accession. With Kosovo* being the only economy in the Western Balkans without the visa-free regime, 37% of its residents associated freedom to travel to the EU integration process. On the other hand, Bosnia and Herzegovina (39%), North Macedonia (39%) and Montenegro (39%) follow in the region in terms of their confidence in economic prosperity due to potential EU accession. Once again, Albania, Kosovo* and this time North Macedonia as well are most interested in the ability to study and work in the EU (46%, 39% and 37%, respectively). Albania also stands out in terms of its residents' beliefs that Albania's accession to the EU will improve the democratic standards of the economy. As for gender equality, not only that it does not represent any significantly expected product of the EU accession, but it also contracted by 8 points, with only 4% of the Western Balkans associating their economy's accession to the EU with an improvement in terms of gender equality.

UNEMPLOYMENT AND RISK OF POVERTY

Speaking of lifestyle in the Western Balkans, the preponderant part of citizens has an average standard of living (72%). The group of respondents who perceived their socio-economic status as above average (6%) on the other hand, recorded a slight progress, while one-fifth were living worse than others. The socio-economic status of respondents in Bosnia and Herzegovina was mainly described as average (78%).

Simultaneously to the increment of respondents who live in worse conditions than the average population, concerns over the increasing inequality among the society has also spiked. 82% of the region believed that the gap between the poor and the rich is consecutively increasing while 12% didn't agree. Albania (88%), with a 5-point increase since 2020, is the region's biggest worrier over the wealth gap.

More than half of the interviewed participants were employed (57%), while 13% had no jobs. The remaining groups were retired or students. Interestingly, the numbers of employed and unemployed citizens simultaneously decreased, albeit slightly. Further diving into employment categories, results show that 8% were self-employed, while 49% of the population were employees. On the other hand, 13% were job-hunting, 6% were taking care of their families and children, 16% of respondents were retired and 8% were students. At regional level, the private sector was the predominant source of employment, though to a lesser extent since last year (68%, from 73% in 2020). On the other hand, 32% of respondents worked in public administration.

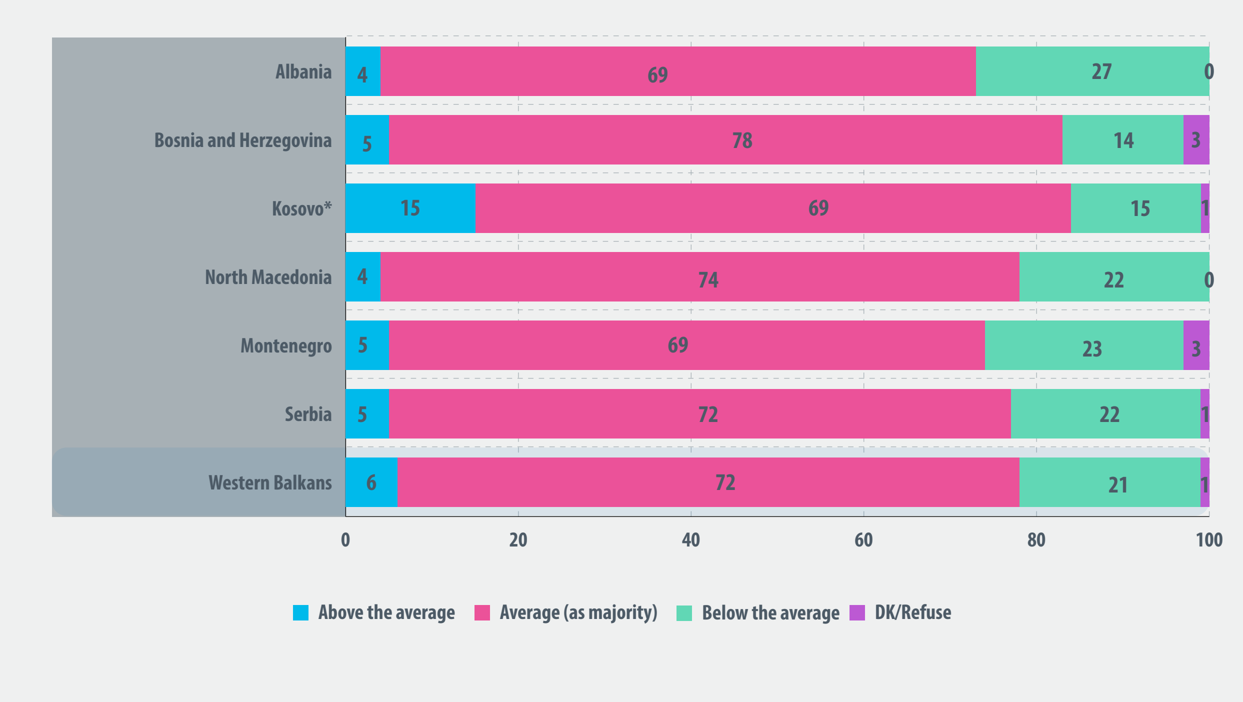
With expenses rising on a daily basis, there is an increasing concern of citizens towards their financial ability to cover basic expenses. Most respondents of the Western Balkan (78%) could afford basic utility bills. On the contrary, one-fifth found it difficult to pay rent. Some 73% affirmed to afford monthly instalments on a loan, while 18% faced difficulties. While the vast majority (85%) could afford buying clothes and food, 13% struggled to pay such basic supplies.

People's self-perception from the financial aspect seems to have somehow improved. While 10% of citizens feel looked down because of their income, this is a 4-point subtraction compared to 2020. On the other hand, one-fourth of respondents were afraid that they could fall in the poverty trap, while 12% feel excluded from their societies.

Gender inequality, a global pressing challenge which requires proactive engagement from respective governments, unfortunately persists in the Western Balkans as well. Though gender-based discrimination was widely acknowledged as a concern, thoughts on how to address it differ. Equal recruitment of female and male employees remains the most favourite measure (49%), while equal remuneration for men and women (44%) was again ranked the second most appropriate means to address gender inequality. Interestingly enough, one-fourth of the region believed that gender-based discrimination is non-existent at work.

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

(All respondents, N=6029, single answer, share of total, %)

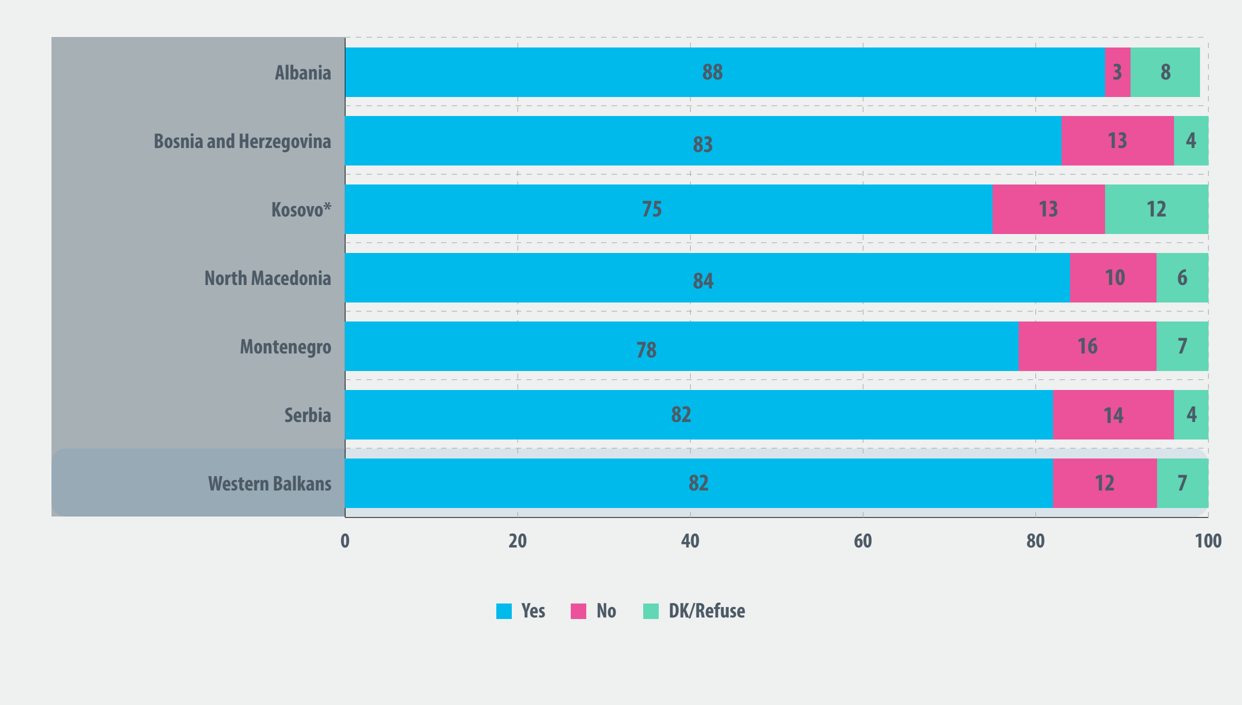


The vast majority of the region's respondents considered their standard of living as average (72%), despite a 5-point decrease since last year. The group of respondents who lived above the average (6%), on the other hand, recorded a slight progress (1 point), while one-fifth of respondents complained to be living worse than others. Bosnia and Herzegovina remains the economy with the citizens of an average socio-economic status (78%).

Meanwhile, 15% of Kosovo*'s respondents affirmed to be living better than the average, thus recording a remarkable 12-point spike compared to 2020. At the other end stands Albania, as the economy with the most participants who felt the most concerned that their standard of living was deteriorating (27%). Montenegro (23%), Serbia (22%) and North Macedonia (22%) also recorded relatively high percentage of households that claimed to be living worse than their peers. In general, the share of citizens living below the average level has increased by 4 points (21%, from 17% in 2020), a red flag that inequality among different classes in society is increasing.

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

(All respondents, N=6029, single answer, share of total, %)

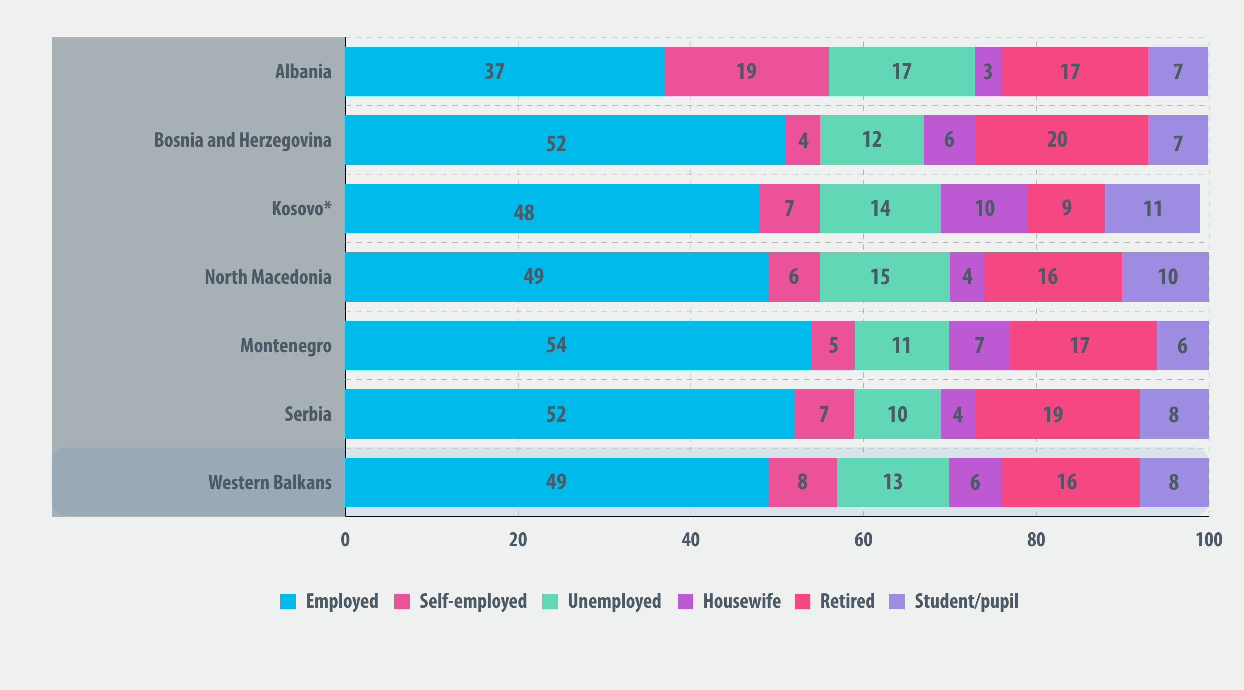


Results show a positive correlation between citizens who claimed to be living worse than the average and those who believe that economic inequality is increasing among the society. 82% of the region, a 2-point increment since 2020, believed that the gap between the poor and the rich is consecutively increasing while 12% didn't share the same concerns. 7% refused to respond.

While all economies in the region considered the wealth gap a growing negative trend, Albania (88%), with a 5-point increase since 2020, is home to the highest share of concerned respondents. North Macedonia (84%) and Bosnia and Herzegovina (83%, a 5-point growth since 2020) were ranked second and third. Interestingly enough, in Montenegro, one of the two economies with most respondents who considered wealth gap a constantly increasing trend (83%) in 2020, this cycle it shifted to the opposite group. Some 16% of respondents in Montenegro did not see economic inequality rising, while on the contrary, only 3% of respondents in Albania agreed with their counterparts from Montenegro. The highest proportion of those who refused to answer this question is again from Kosovo*, with 12%.

Figure 32: What is your current working status?

(All respondents, N=6029, single answer, share of total, %)



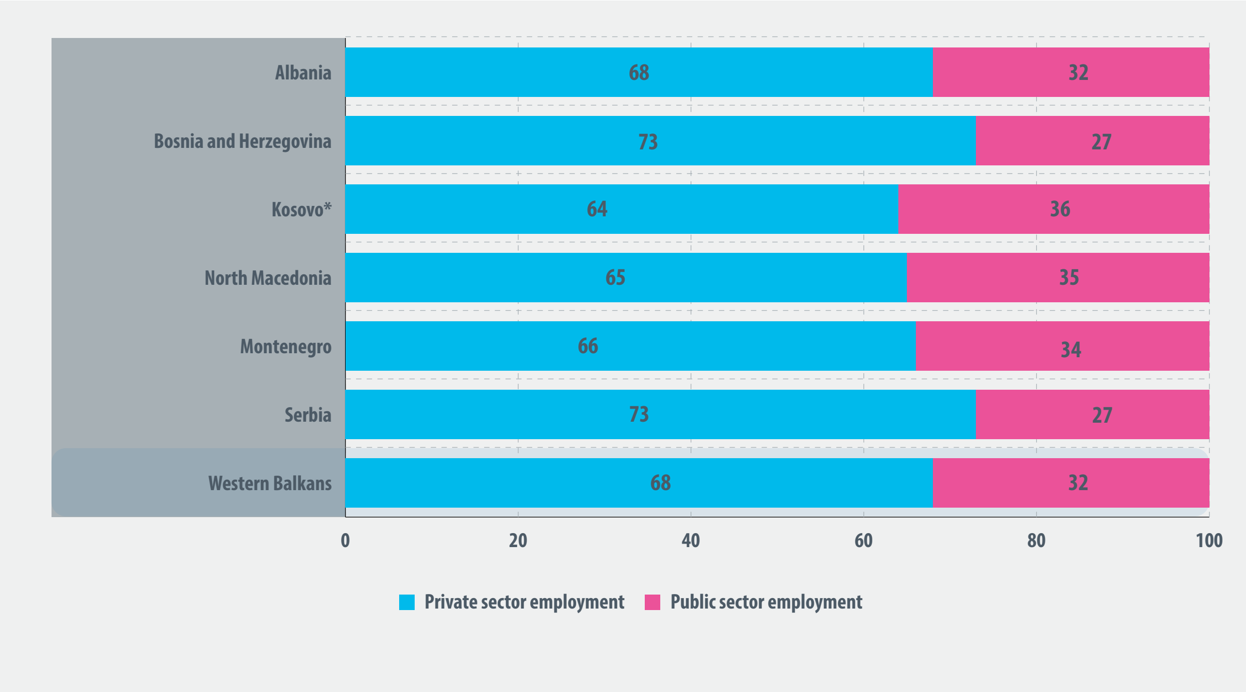
While this is the third time that employment numbers outnumber the other group, findings show a modest difference. More than half of the population said to be employed (57%), while the remaining 43% claimed to not have a job, or to be retired or studying. Interestingly, the number of employed and unemployed citizens has simultaneously decreased by 1 point and 2 points respectively.

Talking from a 'category' perspective, 8% of respondents were self-employed, while 49% of the population were employees. On the other hand, some 13% claimed they were looking for a job but were not engaged in any position, 6% were not working because they had to take care of their families and children, 16% of respondents were retired and 8% were currently studying. At economy level, Kosovo*, which marked a record as the economy with most employed citizens (77% in 2020) last year, witnessed a notable 22-point downturn (55%) in this round.

Serbia (59%) and Montenegro (59%) are the region's best performers in terms of employment, while North Macedonia (15%), Kosovo* (14%), and Albania (13%) have the highest number of respondents claiming to be unemployed, though with a small difference compared to the other economies. Kosovo* (10%), is home to the highest number of housewives (10%) and students (11%) in the region, while one-fifth of respondents from Bosnia and Herzegovina claimed to be retired. 17% of respondents in Albania are actively searching for jobs but are not working, while 19% of them are self-employed, thus making Albania the region's leader in this category. On the other hand, Montenegro (54%) shelters the highest percentage of participants who are employees.

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

(Employed, N=2939, single answer, share of total, %)



Private sector was identified as source of employment for the majority of the population, albeit at a lower percentage (68%, from 73% in 2020). On the other hand, 32% of respondents confirmed to be working in public institutions.

This cycle, Serbia (73%) and Bosnia and Herzegovina (73%) co-lead in terms of private sector employees, while Kosovo* went from the economy with the lowest number of civil servants (14% in 2020), to the region's leader in terms of public sector (36%). North Macedonia (35%, down from 42% in 2020) and Montenegro (34%) share a similar percentage of employees in the public sector.

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

(Employed or self-employed, N=3426, single answer, scale from 1 to 4, share of total, %)

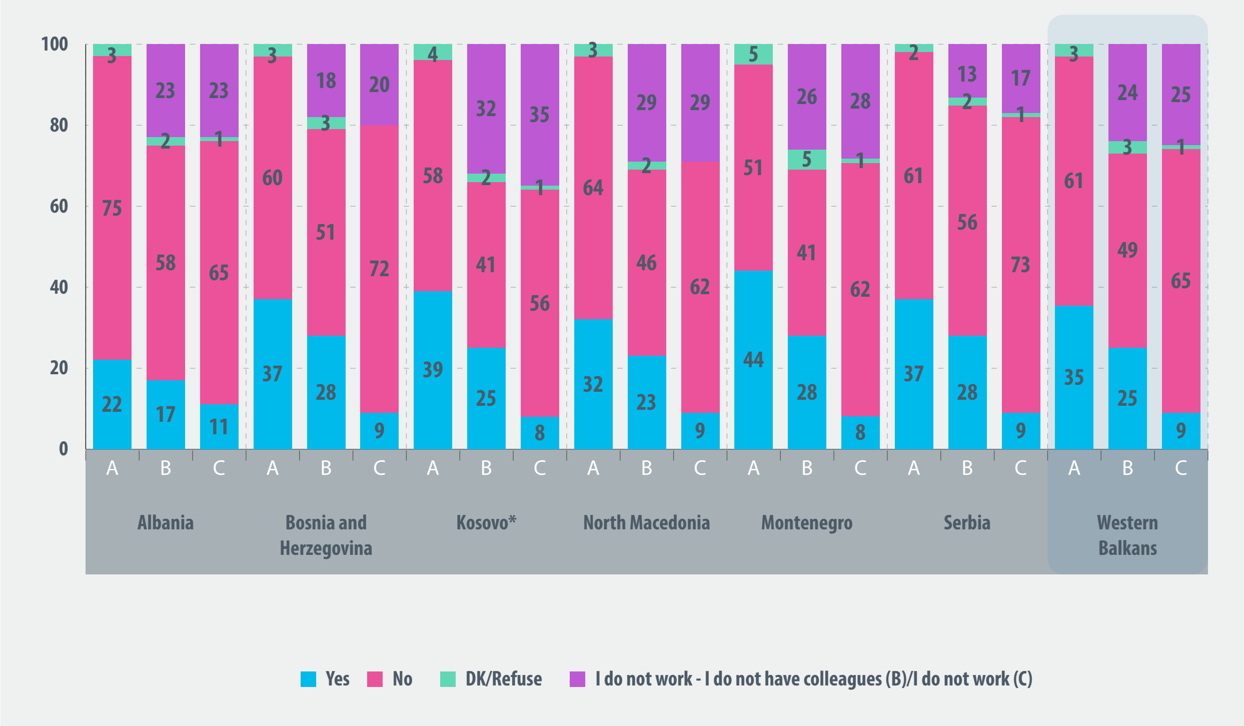
Contrary to the much safer public sector, the private sector is considered to bear higher risks for job stability. The confidence of respondents' job security in the private sector, however, upturned to 68% (from 62% in 2020).

Interestingly, economies that recorded the highest number of respondents working in the private sector recorded a high level of confidence in keeping their job in the coming year. Kosovo* (77%) is the region's most confident economy, followed by Serbia (72%) and Montenegro (74%). 63% of those polled in Bosnia and Herzegovina believed their job in the private sector was secure, while only 59% of survey participants in North Macedonia had such confidence. As expected, Macedonia is home to the highest number of sceptical employees (37%), while Kosovo* (20%) shelters the lowest percentage of reluctant citizens.

Figure 35: Did any of the following situations happen to you in the past 3 years?

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

(All respondents, N=6029, single answer, share of total, %)

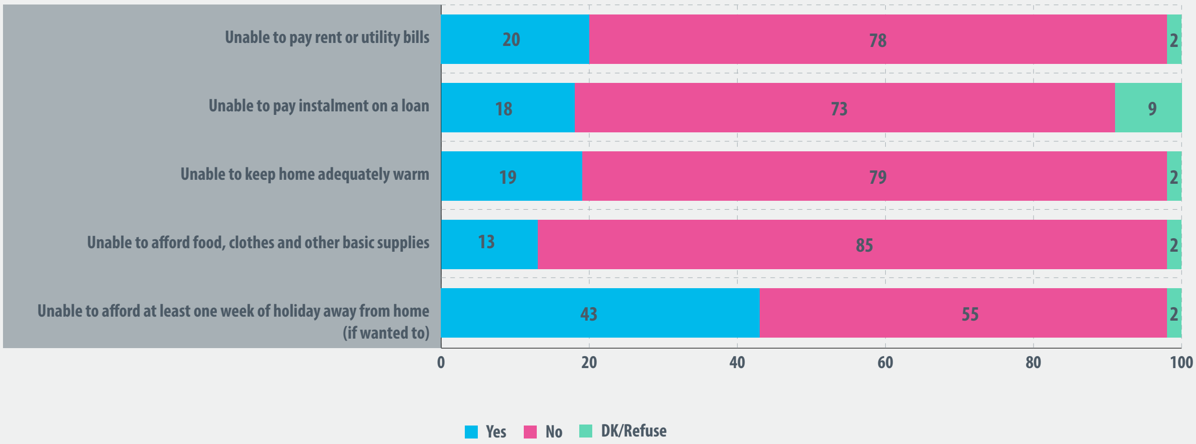


Regarding job losses, 35% of participants reported that people from their immediate circle got fired within the last 3 years, though a lower percentage was recorded (from 40% in 2020). On the other hand, the majority of the population (61%) denied to have had friends or family members got dismissed lately. Results show similar findings for the other two categories as well. While only 9% of respondents in the region confessed of getting fired, a predominant percentage of 65% claimed they were still employed. Some 25% have been unemployed in the last 36 months. Results imply a regional incrementing stability in the labour market, since this cycle recorded a notable contraction in the number of relatives and colleagues fired (compared to 2020).

At economy level, Montenegro remains the most affected by job losses in all three categories; a family's or friend's job loss (44%), the job loss of a colleague (28%) as well as those who lost their own job (8%). On the other end, 22% of respondents in Albania saw their friends or family members lose their jobs, 17% claimed their colleagues were dismissed, while only 11% admitted that they got fired in the last three years.

Figure 36: Did your household face any of the following problems (even at least once) during the past 12 months? (Results for the Western Balkans region)

(All respondents, N=6029, single answer, share of total, %)



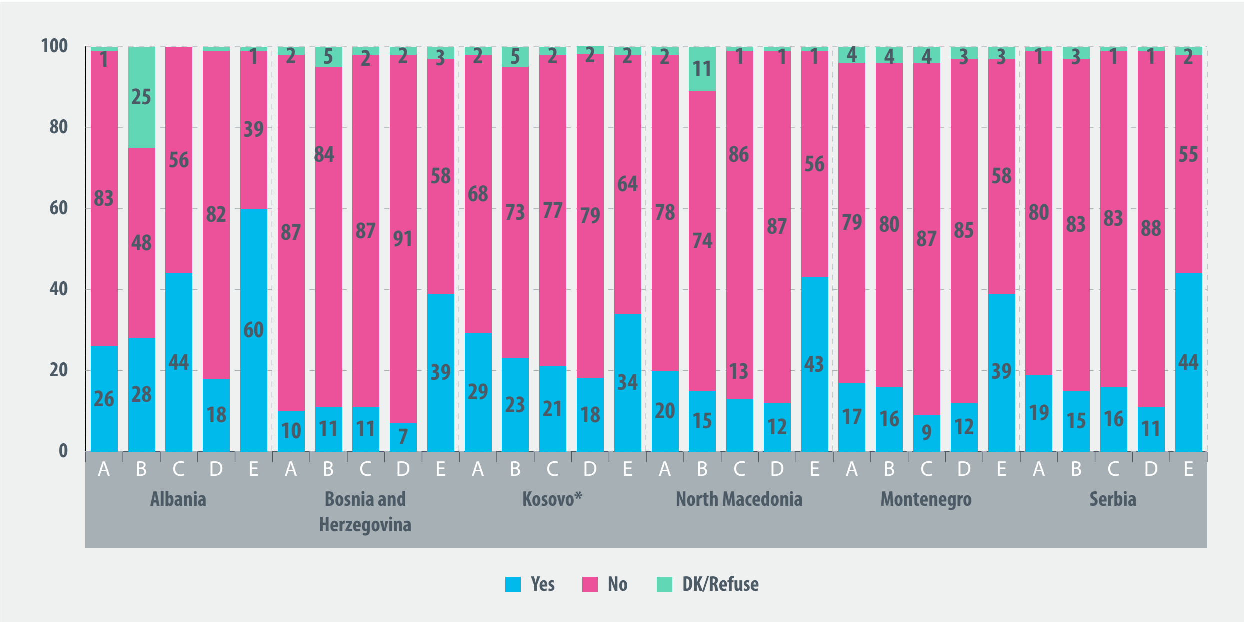
At regional level, findings reflect an increasing concern of citizens towards their financial ability on basic expenses. The vast majority of respondents (78%) claimed they could afford basic utility bills. On the contrary, one-fifth found it difficult to pay rent. Some 73% affirmed to afford monthly instalments on a loan, while 18% faced difficulties. While clothes and food were considered affordable by the predominant part of the population (85%), some 13% struggled to pay such basic supplies.

Contrary to the abovementioned categories, 55% of respondents said they could afford a week of vacation, while a total of 43% considered this luxury unaffordable for their current budget.

Figure 37. Did your household face any of the following problems (even at least once) during the past 12 months? *(Results by economies)*

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

(All respondents, N=6029, single answer, share of total, %)



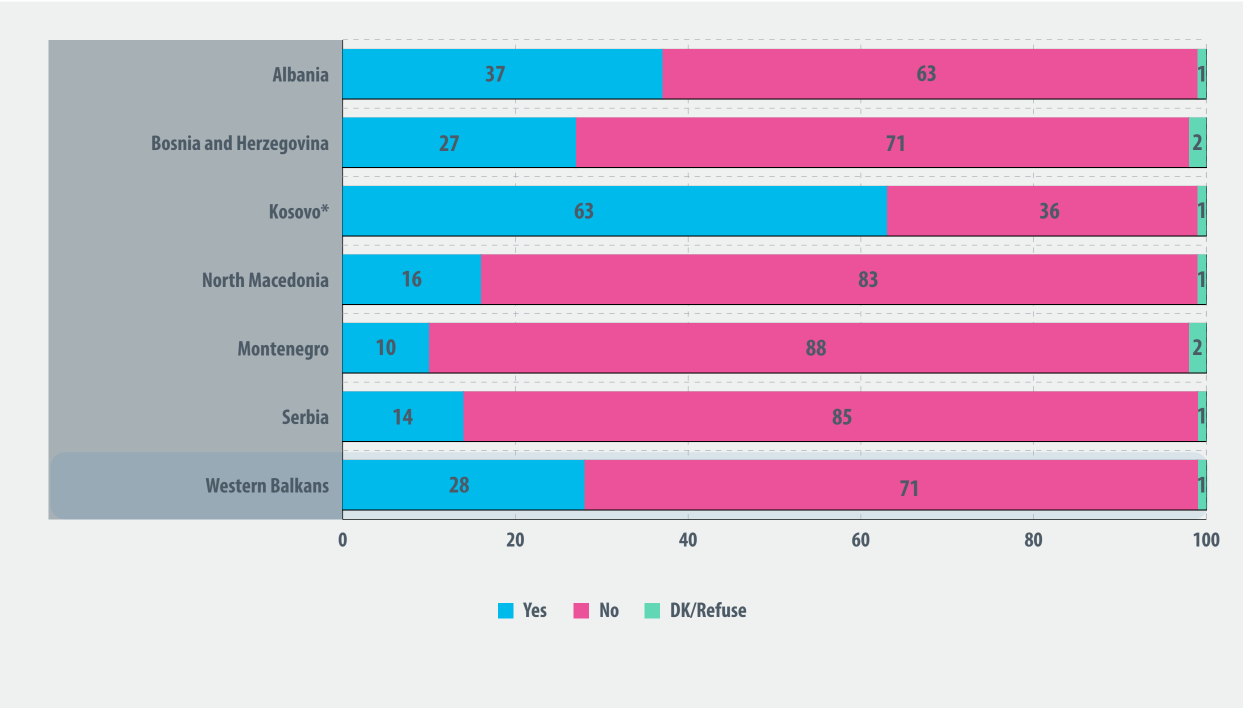
Talking from the lens of individual economies, 44% of respondents in Albania complained that their households were not able to keep their home adequately warm, while 56% did not consider it a problem. 73% of them were able to pay their rent or utility bills without a problem, while 26% confessed to have struggled. 60% were unable to afford at least one week of holiday away from home.

A similar concern about the ability to pay their loan was raised by 28% of respondents, while food and clothes were unaffordable (at least once) for 18% of the population (4% up from 14% in 2020). In contrast to Albania, Bosnia and Herzegovina citizens were positive of their household's financial ability to pay for basic expenses. While 10% of respondents in Bosnia and Herzegovina claimed to have faced difficulties in paying their rent, 11% complained about the difficulty to pay for heating bills or loan instalments. Meanwhile, buying food, clothes and other basic items was not considered a major problem for 91% of respondents. 58% of those polled in this economy said they were able to afford at least one week of holiday away from home, in contrast to 39% who find it impossible. Kosovo* on the other hand, marked a relatively high level of worried citizens over daily expenses. Rent bill became a problem at some point for 29% of citizens, while 23% could not afford paying a loan's instalment. 21% were having problems to keep their houses warm, while 18% considered food supplies expensive for their budget at least once. Enjoying a one-week holiday was unaffordable for 34% of those polled in Kosovo*, while 64% didn't consider it a problem.

One-fifth of citizens from the North Macedonia were not able to pay their rent, while paying a loan's instalment was not affordable for 15% of them. 13% had problems with heating expenses, while 12% could not afford basic supplies at one point. Almost half of the population claimed they couldn't book a one-week vacation as it exceeded their budget. On the other hand, the vast majority of respondents in Montenegro (79%) were able to pay their monthly rent, and 80% could afford paying their loan's instalment. Heating their houses was not considered a financial problem for 87% of the population while 12% found food supplies unaffordable at least once. The same case was not valid when it came to a one-week vacation, as 39% of respondents in Montenegro couldn't afford their holidays. Serbia shares a similar trend with the other economies in the region. Some 19% could not pay their rents at least once, while 15% found it difficult to pay an instalment of their loans. 83% could afford paying for heating bills, while the vast majority (88%) were able to afford food expenses. Similar to its neighbours, Serbia (44%) struggles with vacation related expenses.

Figure 38: Did your household receive help in the form of money or goods from another individual living abroad at least once in the past 12 months?

(All respondents, N=6029, single answer, share of total, %)



Remittances from diaspora seem to have spiked in 2021, as 28% of the Western Balkans said their household received money from their relatives abroad (from 19% in 2020). After a regression in remittances, the rising outward economic migration across the region has again translated to increased remittances this year, similarly to previous cycles of Barometer. In 2021, except for Albania (where remittances went to 4.9% of GDP, from 5.1% in 2020), all economies in the region experienced increase in remittances as a share of their GDP (respectively, Bosnia and Herzegovina went to 8.2% from 7.4% in 2020, Kosovo* 15.7% from 13.8%, Montenegro 6.1% from 5.3%, North Macedonia 2.9% from 2.7%, Serbia 4.7% from 4.5%)[10].

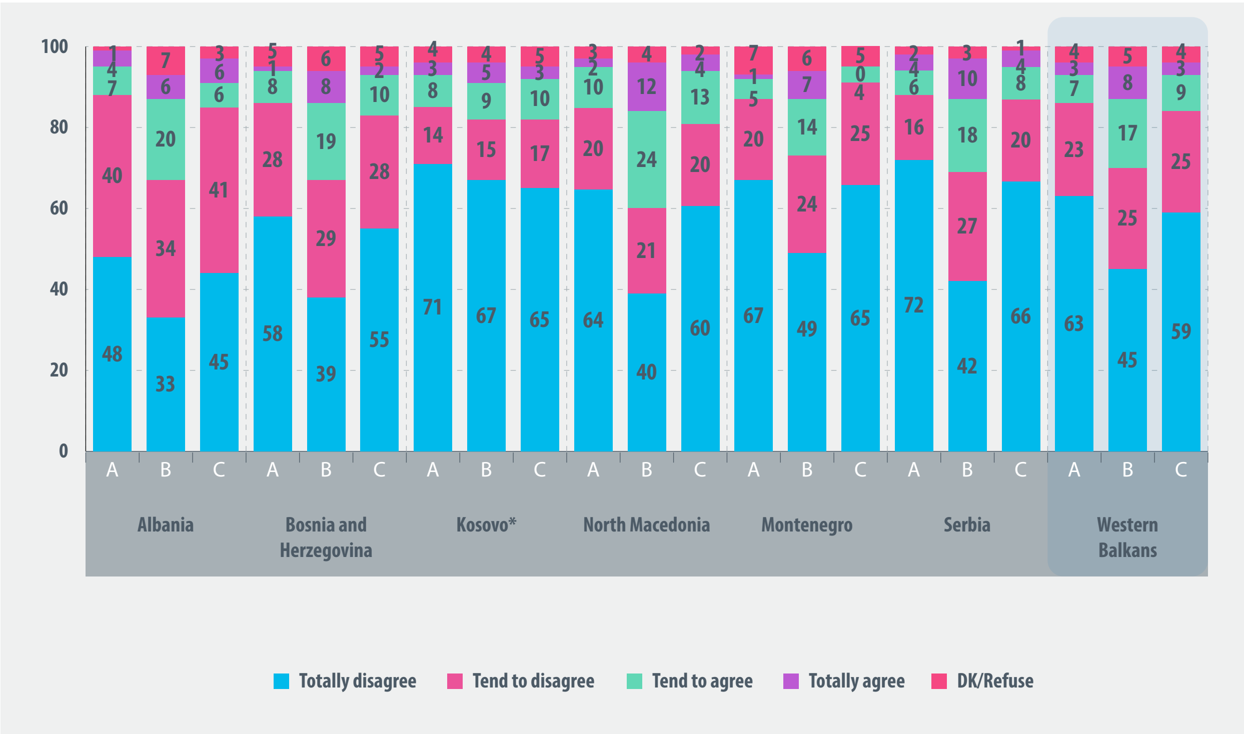
10 World Bank (2022) "Steering through crises" - Western Balkans regular economic report no.21. Available at: https://openknowledge.worldbank.org/bitstream/handle/10986/37368/P17720607706c30e90841607b7d53ee8106.pdf

Kosovo*, the economy the most dependent on remittances, again leads the region (63%). Compared to last year, remittance recipients have more than doubled (from 28% in 2020). In general, Kosovo* oscillated with remittances the last seven years, thus recording a score as low as 28% (in 2016 and 2020) and then as high as 63% in this round. Albania is the second economy whose respondents receive remittances from relatives in diaspora. Contrariwise, the lowest level of citizens dependent on remittances were from Montenegro (10%). A similar trend was followed by Serbia (14%) and North Macedonia (16%).

Figure 39: To what extent do you agree with the following statements?

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

(All respondents, N=6029, scale from 1 to 4, single answer, share of total, %)

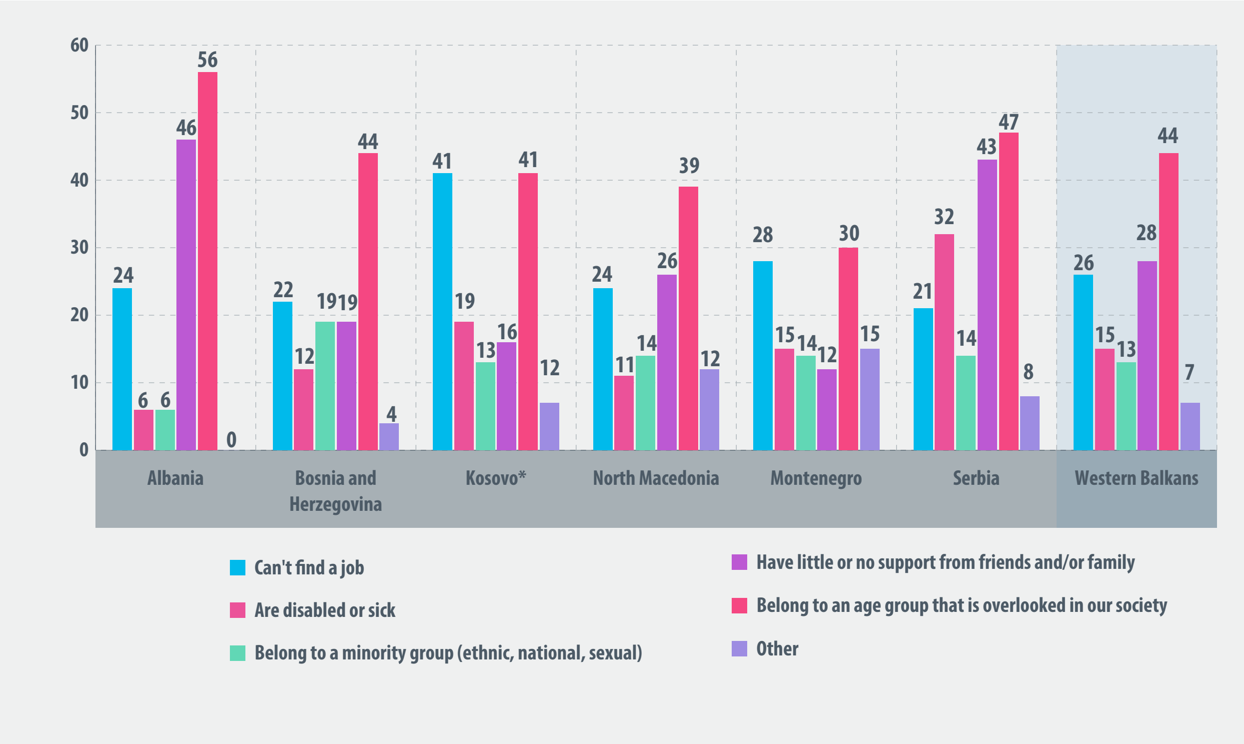


Results of this cycle show a slight improvement in people's self-perception from the financial aspect. While 10% of citizens feel looked down because of their income, this is a 5-point subtraction compared to 2020. On the other hand, one-fourth of respondents were afraid that they could fall in the poverty trap, while 12% feel excluded from their societies.

At economy level, North Macedonia is the region's economy with the highest share of respondents (12%) claiming to be judged by their income, although other economies are not far behind. North Macedonia is also home to the highest concentration of respondents worried about the potential risk of falling into poverty, as more than one-third of the population (36%) expressed this concern. With 17% of its participants feeling excluded from the society, the North Macedonia won the epithet of the most prejudiced economy at all three categories. Montenegro represents the other side of the coin, with only 6% of its participants feeling looked down on because of their job situation and only 4% of respondents feeling excluded. In addition, Kosovo* is home to the least preoccupied population over the poverty trap (14%).

Figure 40: You feel left out because you:

(Respondents who feel left out, N=702, multiple answers, %)



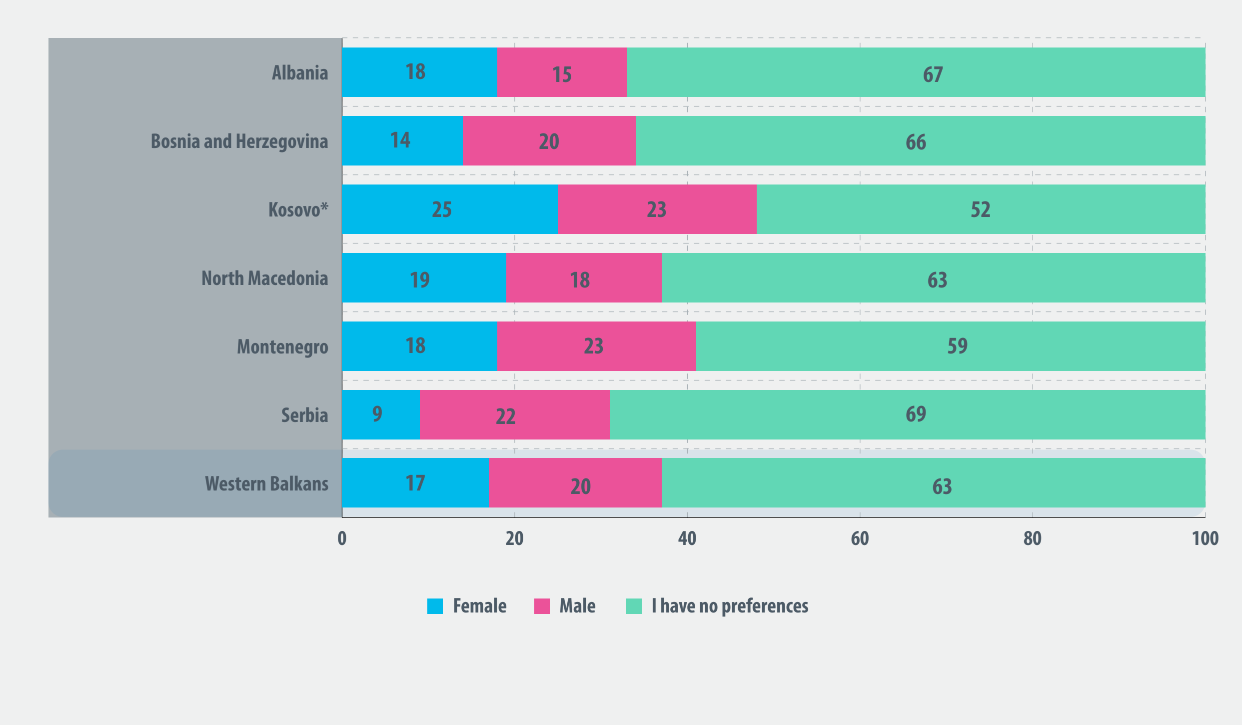
The number of people who felt socially excluded because of their age (44%) have outnumbered those who did not feel welcome because they could not find a job (26%). Respondents who saw lack of family/friends' support as the source of their social exclusion was ranked second, with 28% worrying of this negative phenomenon. Belonging to a minority group was the greatest concern of exclusion for some 13%.

Individuals who cite their ethnical belonging as a barrier to social inclusion have decreased by 6 points, while lack of their family support increased by 2 points. Meanwhile, people who feel excluded because of their medical condition reached 15% of the population, a 3-point increment since 2020. Kosovo* (41%) is home to the highest percentage of participants who blamed their unemployment for their social exclusion, while Serbia (21%) is the least concerned from all the six economies. However, 32% of Serbia's population felt excluded because of their medical disabilities, thus making Serbia the region's leader in this category. Albania (6%) recorded the lowest number of respondents who blame their health issues for not being included.

One-fifth of those polled in Bosnia and Herzegovina who are members of minority communities felt they were not included in the society because of their ethnicity, while only 6% of respondents in Albania shared the same feeling. The lack of friends'/family support on the other hand, is Albania's greatest concern, as 46% of its population perceived it as the reason why they feel excluded. Respondents from Montenegro seem to be the most supportive of their friends and family, as only 12% claimed to have no support at all. While Albania scored significantly better than the other economies in terms of social inclusion, age seems to be a criterion for social inclusion. A remarkable percentage of 56 indicates that older people tend to not feel part of their societies because of their age. Montenegro (30%) scored the lowest in terms of number of respondents considering age as a determinant factor to social exclusion.

Figure 41: Do you prefer to have a female or male boss at work?

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

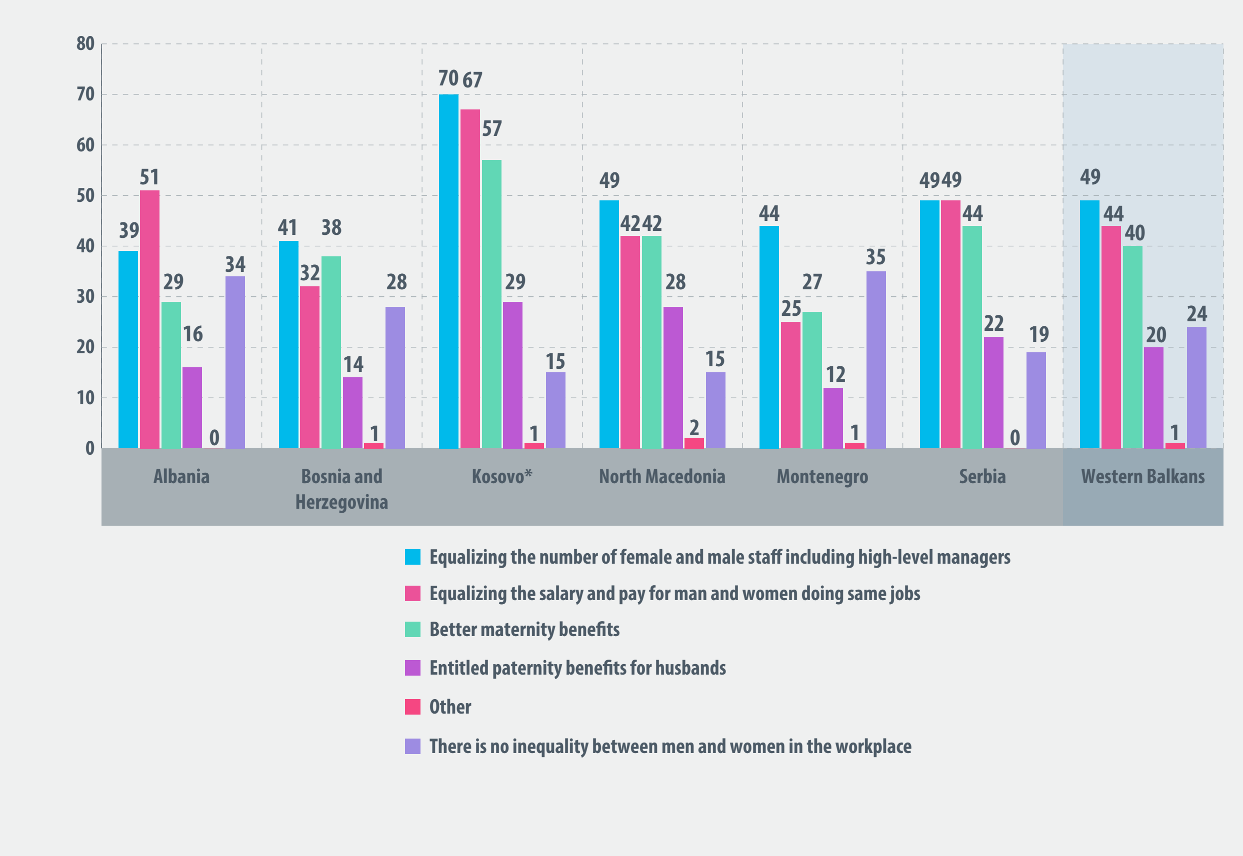


At regional level, the employees' perception that gender is a determinant of an employee's skills is a decreasing trend. Thus, the share of respondents who have no preferences over their manager's gender remains high, despite its 6-point contraction (63%, from 69% in 2020).

Kosovo* and Serbia again stand at opposite ends. While 25% of respondents from Kosovo* preferred a woman as their manager, only 9% from Serbia share the same preference. North Macedonia, Kosovo* and Albania reflect a more ambiguous picture in terms of gender-based preference of supervisors, as the disparity between participants who prefer men vs women bosses is almost irrelevant with (19%-18%, 25%-23% and 18%-15% respectively). Serbia is the economy with the highest gender-preference gap in favour of the male contingent (22% vs 9%). With an average of two-thirds of participants stating to not have any preference, findings show that employees tend to look for other professional qualities in a supervisor, and the gender issue is an irrelevant criterion.

Figure 42. Gender equality at work can be improved by:

(All respondents, N=6029, multiple answers, %)



Gender inequality, a high concern at global level, unfortunately prevails in the region as well. Governmental actors and respective mechanisms need to jointly enhance their efforts in mitigating such a negative trend. While gender-based discrimination was perceived as one of the most pressing challenges in the region, thoughts on how to address it differ. While equalising the number of female and male staff remains the most favourite measure (49%), this cycle recorded a 15-point decrease since 2020.

Same remuneration for both men and women (44%) was again ranked the second most appropriate means to address gender inequality, though with a significant contraction of 13 points. Better maternity benefits were considered a remedy for gender inequality at work by 40% of citizens, while interestingly enough, one-fourth of the region believed that gender-based discrimination is non-existent at work. Entitled paternity benefits have been ranked fifth, thus making up 20% of the entire population.

Kosovo* (70%) is again the biggest proponent of equal staff members between men and women, in contrast to the 39% of their counterparts in Albania. Kosovo* is also the region's most supportive economy of equal remuneration (67%) and the biggest supporter of maternity leave benefits (57%). On the other hand, only 25% of respondents in Montenegro believed that paying women and men equally can solve the problem, and only 27% were confident that maternity leave benefit is the right answer. Montenegro (35%) and Albania (34%) also shelter the highest number of participants who believed they work in a totally gender equal environment, while only 15% of those polled in Kosovo* and in North Macedonia thought the same.

EMPLOYABILITY AND LABOUR MARKET

The way the region perceived ways to success has somehow changed from previous rounds. Last cycle of Barometer showed that more people thought hard work or good education pay off, compared to this cycle. Speaking regionally, one fourth of respondents considered good education a prerequisite for a bright future, while similarly, 24% believed that hard work determines success. However, knowing the right people was also considered a contributing factor to success. Some 15% claimed that being lucky can play a major role in one's future while 8% thought that living in a wealthy family would open many doors for a person's future.

Once again, professional qualifications and/or the right education (37%) were considered the most important asset for getting a job. Meanwhile, 35% of participants thought that knowing the right people guarantees the path to success. Professional experience was acknowledged by 21% of respondents, while ability to adapt (18%) was also considered important, followed by language skills, willingness to work abroad, and digital literacy were all selected by 12%.

The public sector dominates once again the other employment sectors in terms of employees' preference (28%). On the other hand, due to the high level of uncertainty, the private sector remains the least desirable sector to work in, as 15% of the region's respondents prefer private sector.

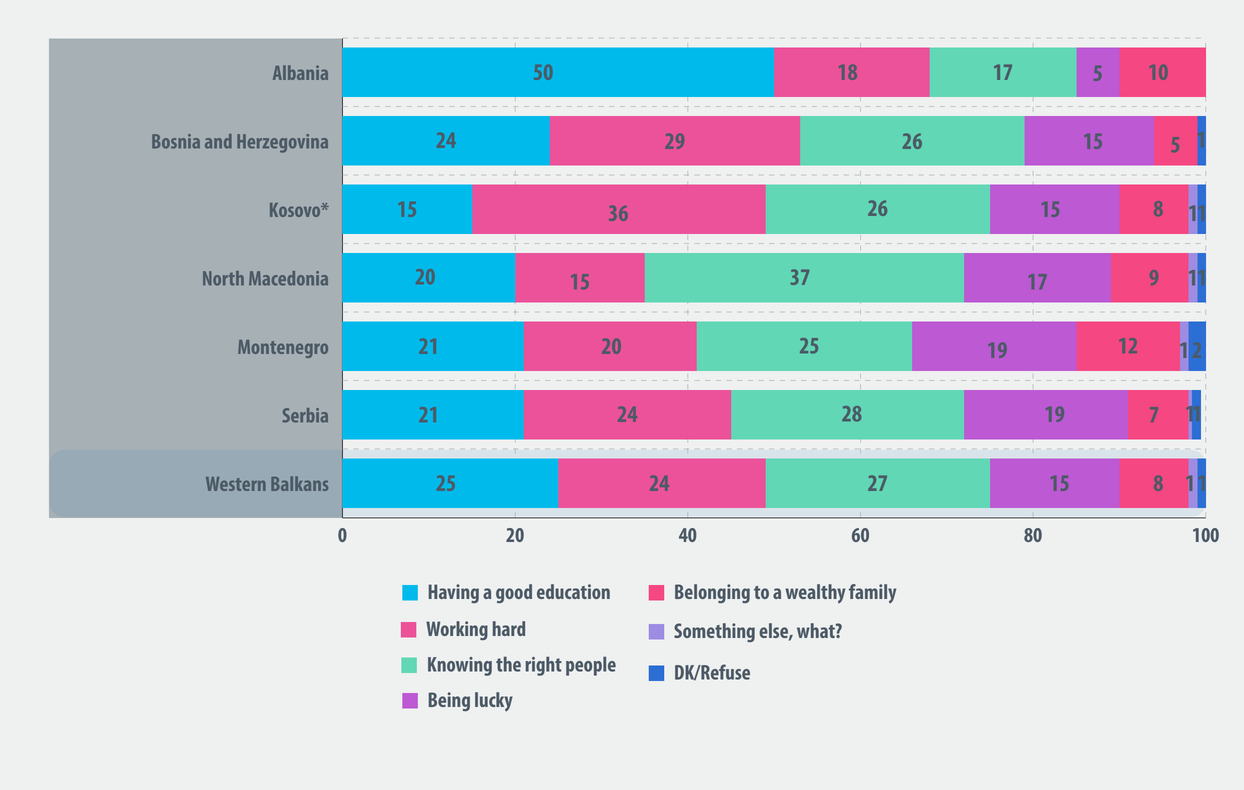
Job security (55%, from 37% in 2020) remains the predominant reason why respondents continue to choose the public sector over the private one. Higher salaries also played a big part in favour of public institutions (29%, from 14% in 2020). While employees of the public sector enjoy the benefits of job security, most private sector fans argued that higher salaries are the perks of working in private companies (54%).

Learning new skills is not perceived an important tool to remain relevant in a competitive work environment, as 62% of respondents from the Western Balkans were not asked to advance their skills. However, with digitalisation being seen as an increasingly used tool to remain competitive in ever-changing labour markets, digital skills (37%) are the most required skills in the region. 37% of employers in the region claimed to have been asked to learn a new language, while one-fourth confirmed that they were asked to improve their mother tongue communication skills.

This cycle reveals that employed respondents express more interest in acquiring additional qualifications in order to advance in their current jobs (72%), compared to those who are searching for one. Despite a strong incentive (such as getting a job), individuals still expressed less interest in getting trained. However, at regional level, the majority of participants were willing to train in order to get a job, thus making up 57% of the region's population.

Figure 43: What do you think is the most important for getting ahead in life?

(All respondents, N=6029, single answer, share of total, %)



Regionally speaking, the perception on how success can be achieved somehow changed from previous rounds. Findings indicate that: while last year the share of people who were convinced that hard work and/or good education equal to a better future spiked; in this cycle, less respondents are confident that education or hard work are determinants of success.

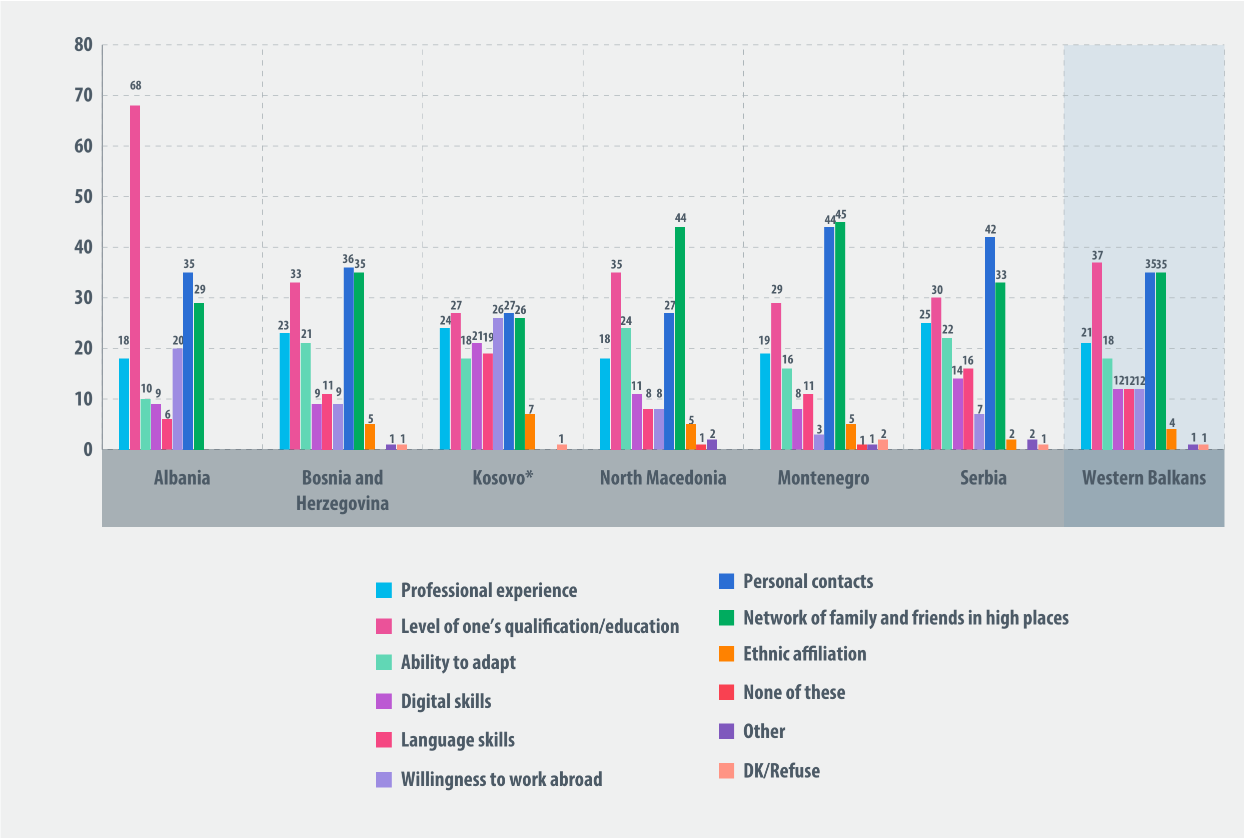
At a regional level, one fourth of respondents considered good education a prerequisite for a bright future, while similarly, 24% believed that hard work pays off. However, knowing the right people was considered the most contributing factor to success by 27%. Some 15% claimed that being lucky can play a major role in one's future while 8% thought that living in a wealthy family would open many doors for a person's future.

Albania (50%) is the region's most proponent economy of good education when it comes to success. The other economies recorded half of Albania's preference for good education, while Kosovo* was the least confident economy on the impact of a good education (15%). Working hard on the other hand, was considered key to success for 36% of survey participants in Kosovo*. North Macedonia is the region's most reluctant economy of the hard work-bright future correlation. While knowing the right people at the right time was acknowledged by all economies, North Macedonia (37%) is home to the highest concentration of people who believe that network translates into success.

While not with a great disparity, Albania (17%) is the region's least convinced economy on getting ahead in life through connections. When it comes to luck, Serbia (19%) and Montenegro (19%) shelter the highest number of respondents who believe that being lucky is important for success. Albania, at the other end, mostly doubted whether being lucky and having success are anyhow correlated.

Figure 44: In your opinion, which two assets are most important for finding a job today?

(All respondents, N=6029, maximum 2 (two) answers, %)

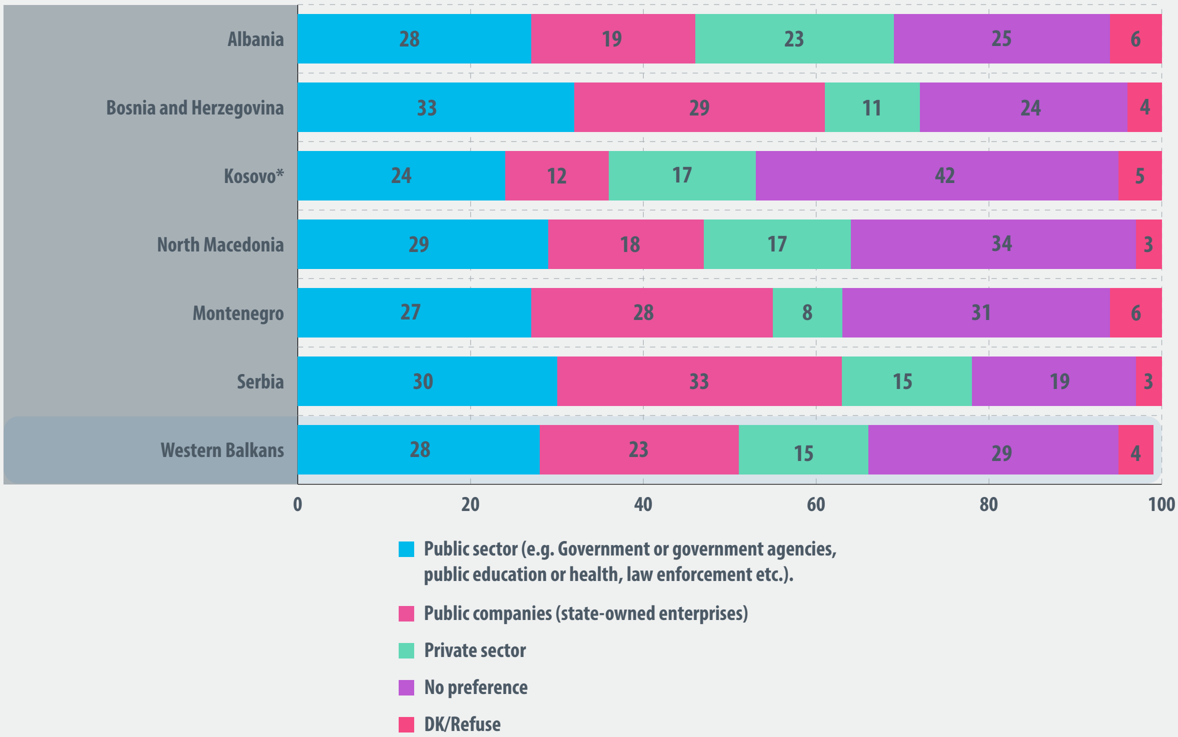


Once again, being professionally qualified and/or having the right education (37%) was considered the most important asset for getting a job. Interestingly enough, personal contacts and knowing the right people were also on top the list for 35% of participants in the region. Professional experience was acknowledged by 21% of respondents, a dropdown from 30% in 2020. Soft skills such as language knowledge, digital literacy and willingness to work abroad were voted as the most important quality by 12% of the population.

While professional experience was ranked highly the previous round, this year all economies seem to have shifted their attention towards other skills. 25% of respondents from Serbia viewed professional experience as a key factor to enter the labour market, while Albania (68%) is the region's biggest proponent of professional qualifications and education when it comes to finding a job. Montenegro is home to the highest concentration of citizens who think that personal contacts (44%) and a broad network of people in high places (45%) are what it takes to get a job. Roughly one-fifth of respondents from Kosovo* thought that investing in soft skills will better attract the labour market. In general, there has been an incremental trend in personal contacts and a wide network being perceived as determining factors to find a job, while professional experience was considered less important for participants in the region, compared to the last cycle of Barometer.

Figure 45: If you could choose, would you prefer to work in the public (public administration and public companies) or private sector?

(All respondents, N=6029, share of total, %)

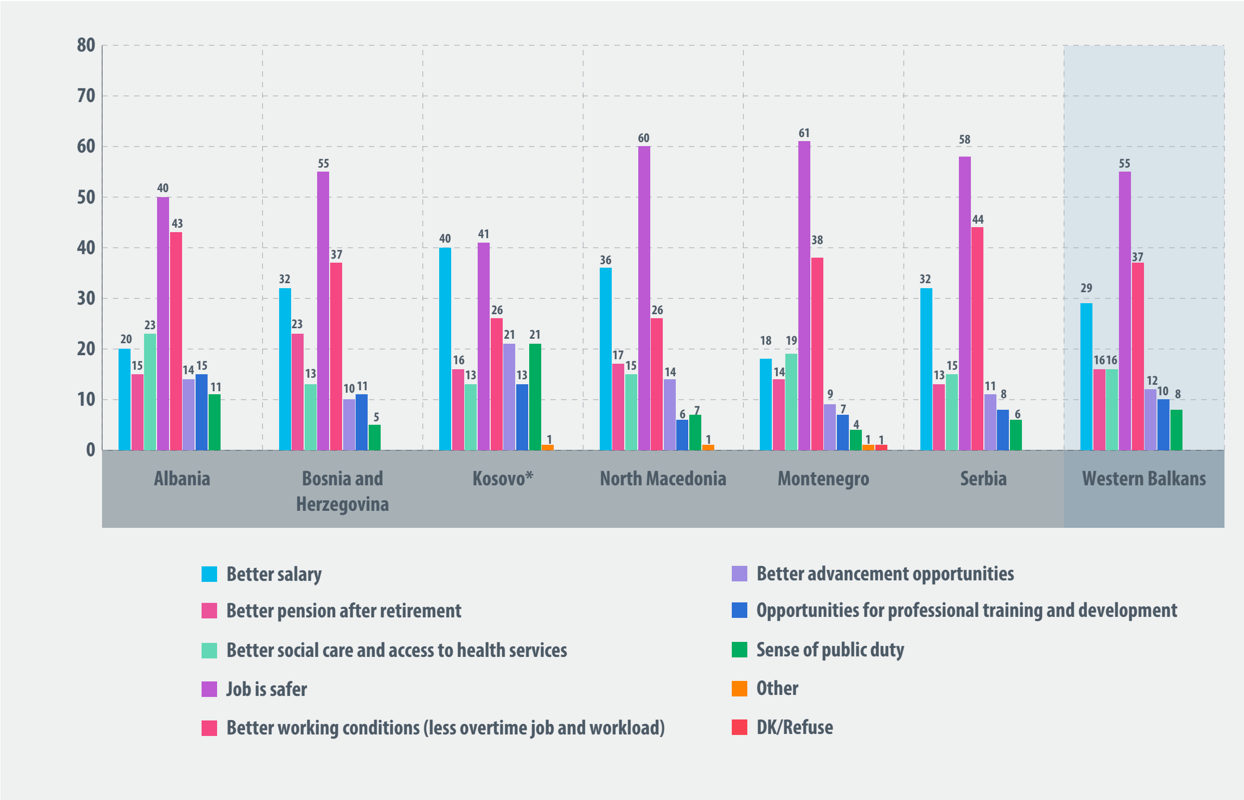


The public sector is once again the most preferred sector of employment, albeit to a lesser extent compared to 2020 (28%, from 33%). Preferences over public companies have recorded a slight increase, with 23% of citizens being in favour of public companies. On the other hand, due to the high level of uncertainty, the private sector remains the least desirable sector to work in, with only 15% of the region's respondents choosing private sector over the public one.

At economy level, Bosnia and Herzegovina is the biggest fan of the public sector, with one third of citizens choosing government agencies as their favourite potential employer. Kosovo* (24%) represents the other side of the coin, though a relatively high number of participants in this survey work in public institutions. Public companies were Serbia's (33%) favourite workplace, while again Kosovo* (12%) is reluctant of public companies. The least preferred sector of employment fluctuated between Albania, as the biggest proponent of the private sector (23%) and Montenegro, the least excited economy (8%). Interestingly, the number of respondents who claimed to have no preference whatsoever remains at high levels from cycle to cycle. At regional level, 29% said they wouldn't mind working in either sector, while from individual perspective, some 42% of those polled in Kosovo* were neutral over the sector of employment.

Figure 46: If you prefer to work in public sector, what is the main reason?

(Those who prefer working in public sector, N=3116, maximum 2 (two) answers, %)

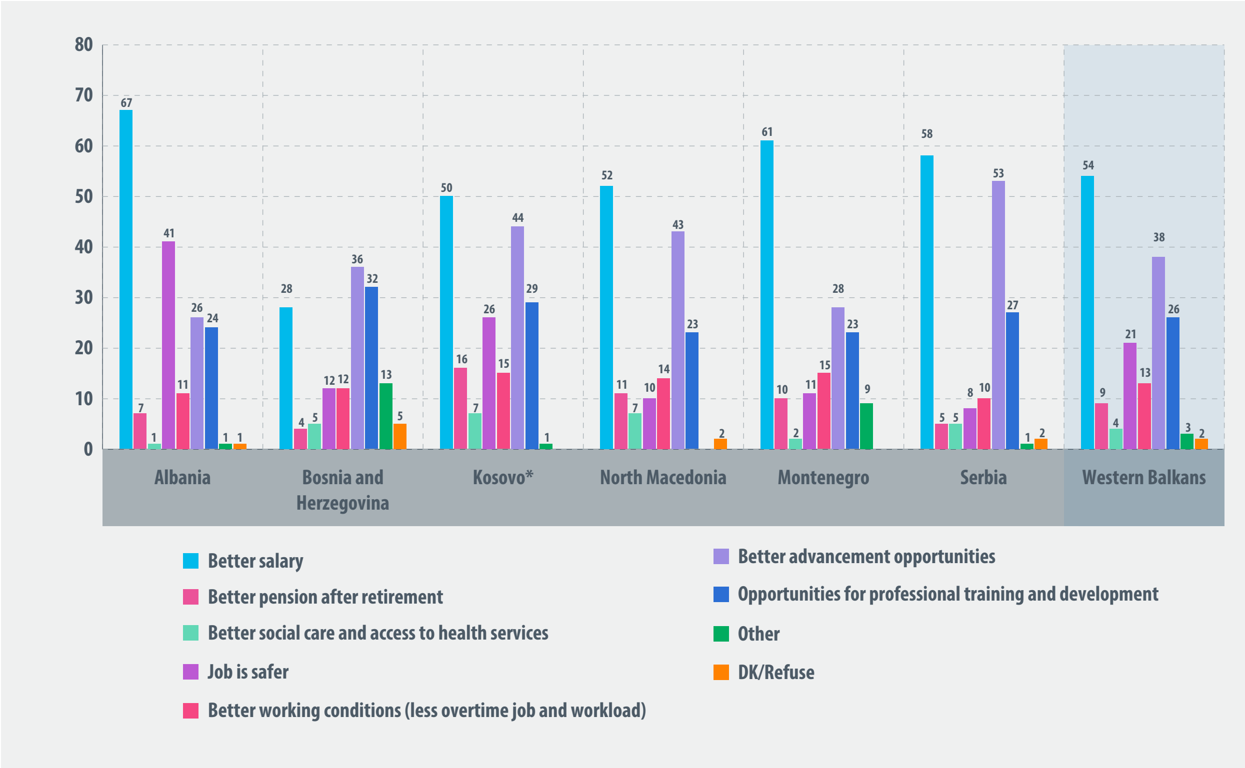


Job security (55%, from 37% in 2020) remains the biggest- perceived advantage of working in the public sector. Higher salaries were also increasingly seen as determining factors of public institutions (29%, from 14% in 2020). Pensions after retirement and social care were considered better at the public sector by 16% of the population, while 37% perceived that working in public administration equals better working conditions. 12% praised the public sector for providing opportunities for professional development while 8% felt that public duty is the main reason why they would choose the public sector over the private one.

In individual terms, more than half of respondents from all the Western Balkan economies valued jobs security the most, with the exception of Kosovo* (41%). Montenegro (61%), North Macedonia (60%) and Serbia (58%) value sustainability the most. Kosovo*(40%) led with the number of participants who though that public sector pays better than the private one. Better social care (23%) and better working conditions (43%) were appreciated the most by those polled in Albania, while Bosnia and Herzegovina (13%) and Kosovo* (13%) didn't believe that public institutions provided better access to health services. Interestingly, most of the abovementioned premises have recorded a notable increase of interest compared to the previous cycle, while overall, the general interest to work in public administration has slightly diminished.

Figure 47: If you prefer to work in private sector, what is the main reason?

(Those who prefer working in private sector, N=886, maximum 2 (two) answers, %)

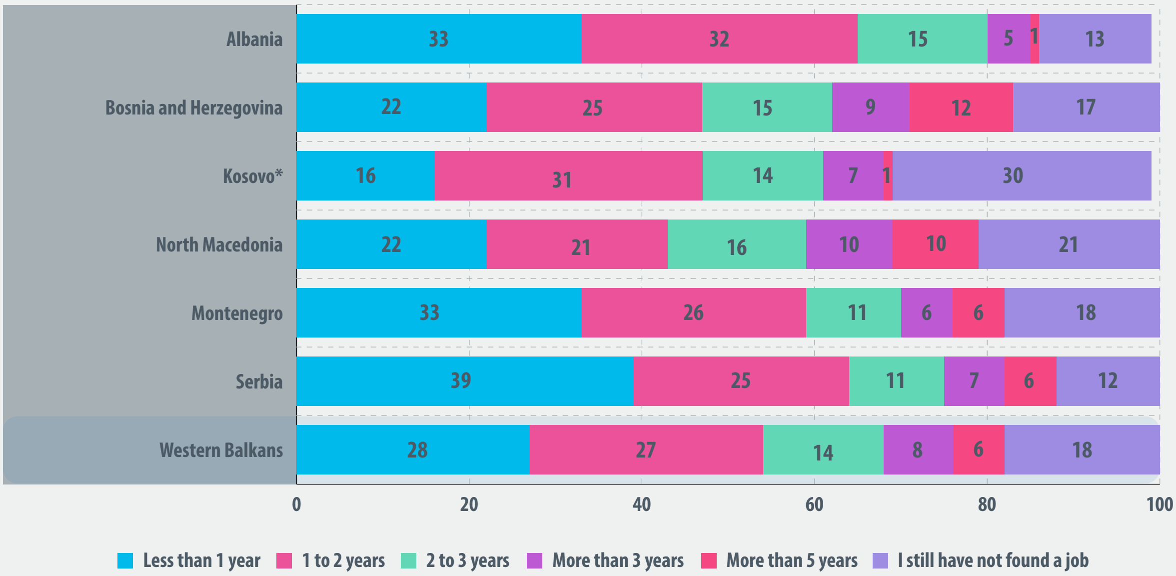


While employees of the public sector enjoy the benefits of job security, most of respondents who prefer the private sector value higher salaries that private companies provide (54%). 38% of those who prefer private over public sector stated better advancement of opportunities as the main driver behind their choice, while 26% valued the opportunities for professional development. Some 21% agreed that the private sector was a more secure sector than the public one, while better working conditions (13%) were considered an important factor for private sector preference.

In general, respondents who prefer to work in the private sector significantly do so for reasons of better remuneration and, to a lesser degree, because of better advancement opportunities. Albania (67%) leads the region in terms of favouring better remuneration from private companies, while Bosnia and Herzegovina stands at the other end with (28%). 53% of participants from Serbia valued better advancement opportunities in the private sector, while job security was perceived the main reason for 41% of preference of respondents in Albania towards public companies.

Figure 48: How long it took you between finishing education and getting the first job?

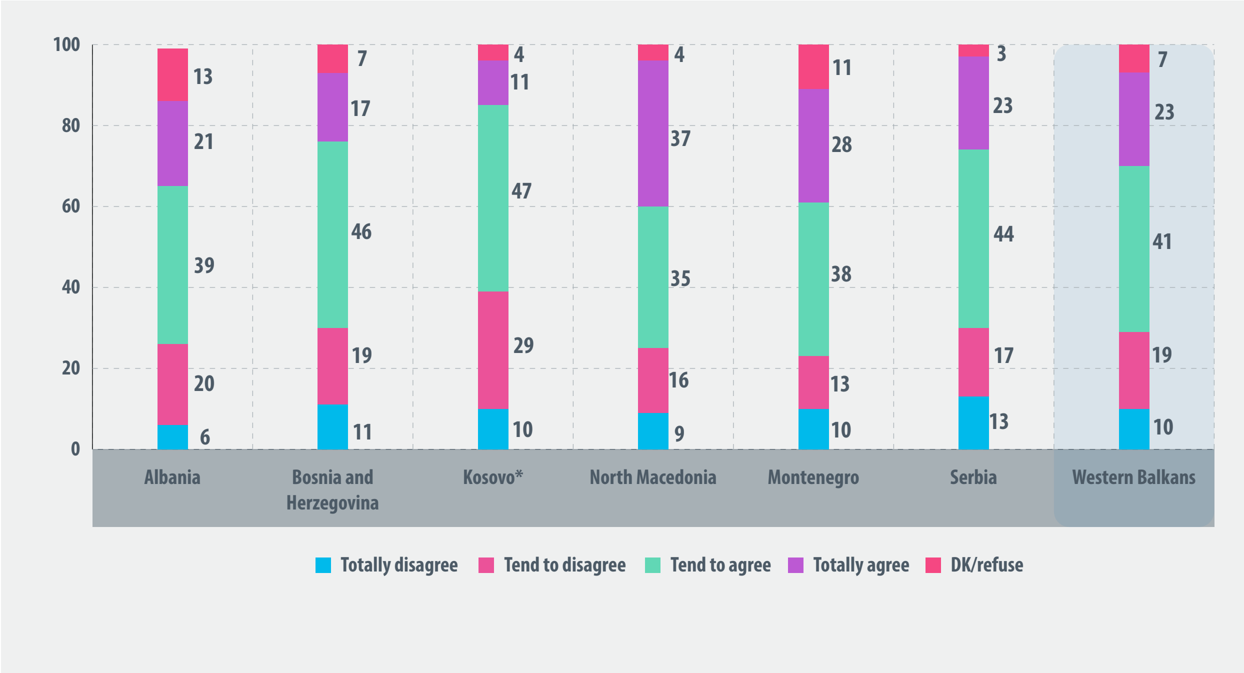
(All respondents, N=6029, share of total, %)



Almost two-third of graduates (69%) confessed to have found a job within the first three years (even higher than last year, when it was 67%), 14% claimed that it took them 3-5 years to get employed, while 18% are still looking for a job (in 2021 was 16%). Most graduates from Serbia were fast in finding a job within a year, while only 16% of survey participants in Kosovo* admitted to have managed to do so. 32% of respondents from Albania were employed from 1-2 years after graduating, while 16% of those in North Macedonia acquired a job after 2-3 years of their graduation. Bosnia and Herzegovina (12%) leads the region in terms of citizens who found a job after more than 5 years of finishing university, while 30% of graduates from Kosovo* claimed they were still not employed.

Figure 49: Would you agree that the skills you learned in the education system meet the needs of your job?

(All respondents, N=4916, scale from 1 to 4, share of total, %)



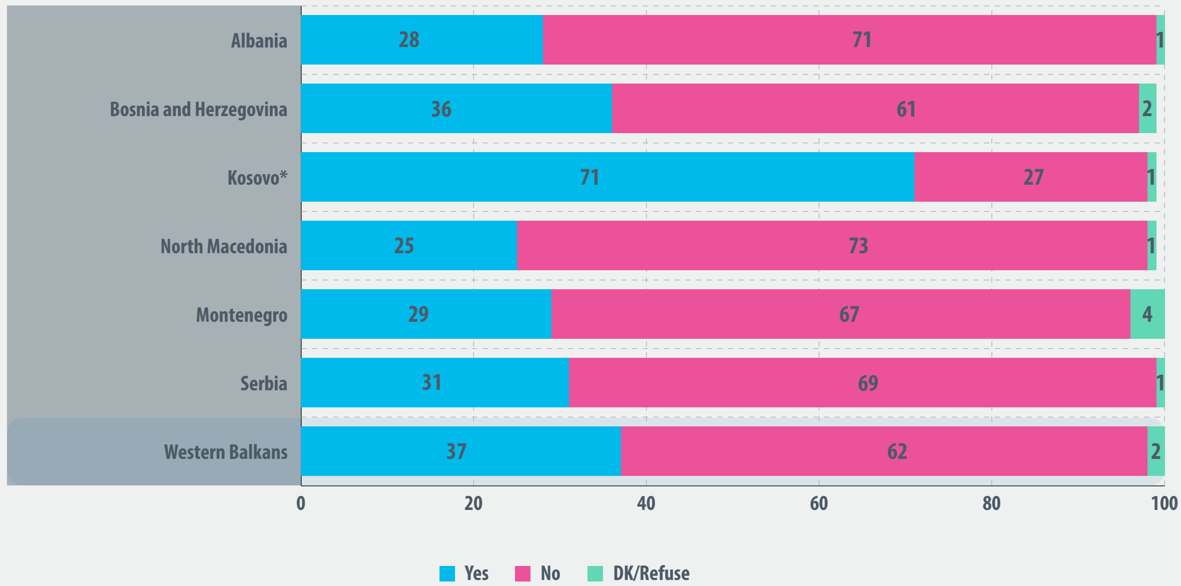
Some 64% of participants in the region found skills acquired through formal education relevant to their current jobs, while 29% counter-argued. The number of individuals who think education prepares you for the labour market has slightly incremented compared to 2020, while contractionary enough, also more people think that these skills are irrelevant at the labour market (25% in 2020).

North Macedonia is the region's most satisfied economy with the relevance of its education system to its employees' workplace, with 72% of respondents being content with their education system. Serbia (67%) is second in terms of citizens' satisfaction with the way education prepares graduates for the labour market. Kosovo* (39%) respondents were the most disappointed graduates from their education system in terms of its relevance to their workplace.

The fact that almost one-third of respondents feel unprepared by the education systems in their economies should be taken seriously by respective governments to actively engage in a dialogue with both educators and employers. Taken in conjunction with the findings related to concerns over brain drain, it can be argued that educational systems are also affected by the widespread migration of professionals. The migration patterns of the region influence, but also are influenced by, educational systems in several ways. Therefore, the result are educational systems that do not meet the labour market requirements.

Figure 50: Has your job required you to learn new or advance your existing skills in the past 12 months

(Employed or self-employed, N=3426, share of total, %)

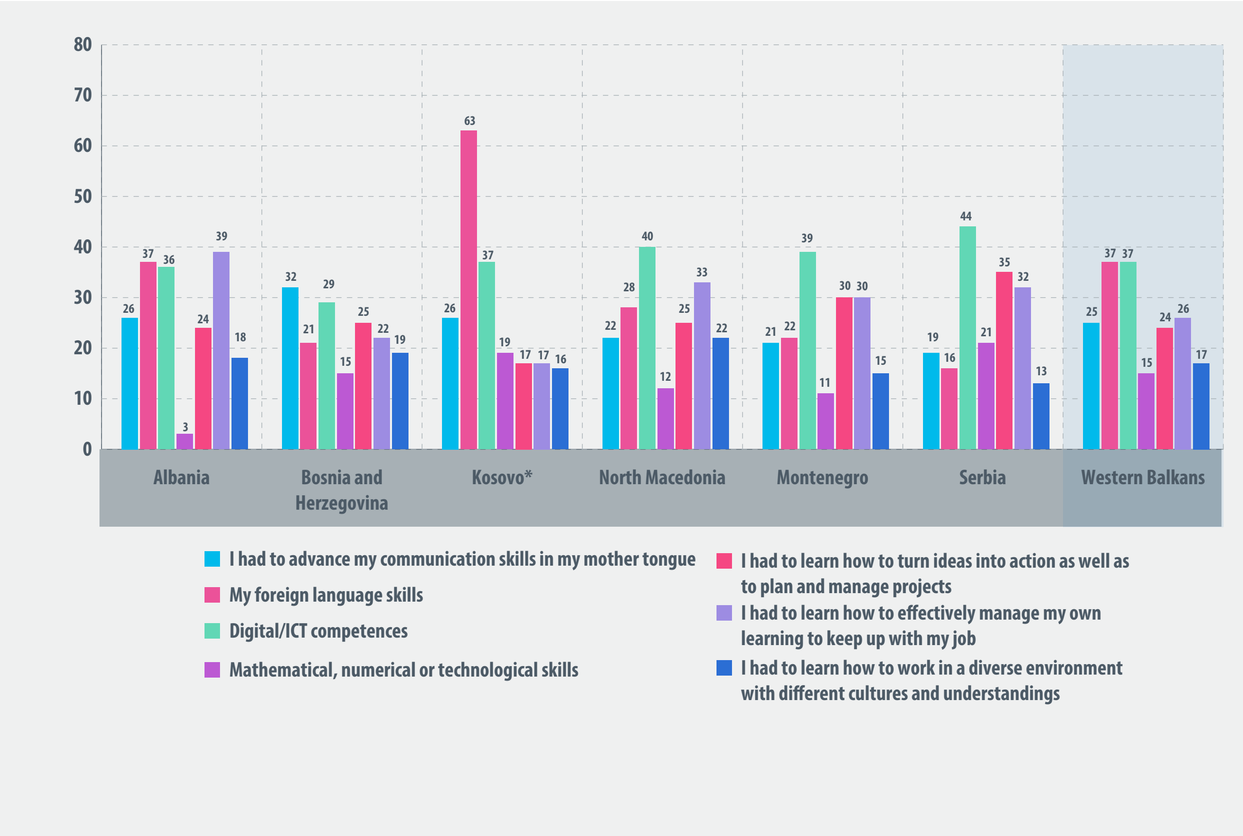


Acquiring new skills is not perceived an important tool to remain relevant in a competitive work environment, as 62% of respondents from the Western Balkans were not asked to advance their skills. On the other hand, 37% of the total respondents were required to invest in learning and self-development.

At economy level, 71% of employees from Kosovo* confirmed to have been required at their job to advance their existing skills, while the same was requested from only 25% of employees in North Macedonia. On the other hand, the vast majority of North Macedonia (73%) and Albania (71%) said they did not have to learn any new skill for their jobs, thus marking the two most stable economies in terms of personal development requirements.

Figure 51: Which of these competences did you need to learn or advance:

(Those whose job required learning new or advancing skills in the past 12 months, N=1225, multiple answers, %)



With digitalisation being an increasingly used tool in modern economy, the importance of digitalisation in the everyday work is proportionally being seen as key to remain relevant in ever-changing labour markets. Once again, digital skills are the most required skills, with 37% of the region's employees stating to have been instructed by their employers to advance their IT literacy (albeit in 2020 it was 39%). Surprisingly enough, with globalisation putting at pedestal the international economies cooperation between companies, 37% of employers in the region claimed to have been asked to learn a new language. On the other hand, one-fourth of respondents confirmed that they were asked to improve their mother tongue communication skills, 26% were told to effectively manage their learning, while 24% were asked to translate their new ideas into concrete practical results. Working in a diverse environment was the employers' prerequisite for 17% of the region's employers while 15% had to improve their numerical skills.

Individually speaking, respondents from Kosovo* were mostly required to learn new foreign languages in order to keep their jobs, while only 16% of survey participants in Serbia were asked to do the same. Overall, mother tongue was not a problem for the majority of respondents in the region. However, Bosnia and Herzegovina has the highest number of employees who had to enhance their communication skills, while again, communication capabilities were among the least problems facing employees in Serbia. Digital skills on the other hand were in high demand for Serbia's citizens, with 44% of them being asked to remain competitive by advancing their IT knowledge. Bosnia and Herzegovina (29%) was the least expected to advance digital knowledge.

Effectively managing one's own learning was a request for 39% of respondents in Albania while only 17% of employees from Kosovo* were required the same. Working in a diverse environment was a prerequisite for remaining in the same job by North Macedonia (22%), the region's most ethnically diverse economy[11].

Figure 52: Would you be ready to acquire additional qualifications to advance at work?

(Employed or self-employed people, N=3426, share of total, %)

While professional advancement is one of the most important aims of an employee, this cycle of Barometer recorded a 13-point contraction in the number of employees ready to acquire additional qualification (72%). On the other hand, an incrementing percentage of people who don't believe in the advantages of further professional advancement has doubled (24%, from 12% in 2020).

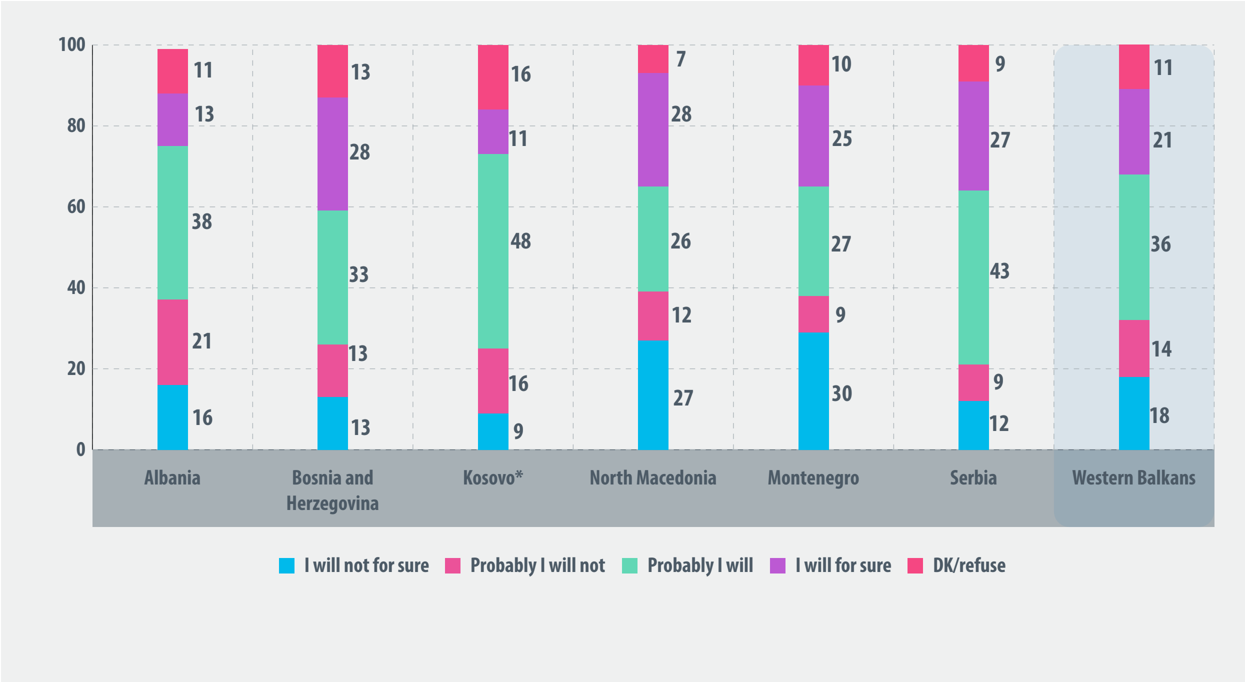
The predominant majority in Bosnia and Herzegovina (81%) and Kosovo* (75%) saw it necessary to improve professionally to advance at work, while only 13% of those polled in Bosnia and Herzegovina and 19% of those polled Kosovo* didn't consider it a necessity. Albania and North Macedonia have more equally divided groups: 57% of those polled in North Macedonia believe that additional qualification could lead to their promotion, while 39% didn't see it as relevant. Likewise, 60% of respondents in Albania would acquire additional training while 36% wouldn't.

From the regional perspective, this cycle of Barometer indicates that less people are willing to acquire additional qualifications in order to get a job (85% in 2020), and an increasing number of citizens are against further advancing their qualifications for a job promotion (12% in 2020).

11 Hysa, Eglantina (2020), *Impact of Cultural Diversity on Western Balkan Countries' Performance*, https://go.gale.com/ps/i.do?p=AONE&sw=w&issn=&v=2.1&it=r&id=GALE%7CA682702879&sid=googleScholar&linkaccess=abs&userGroupNa-

Figure 53: Would you be ready to acquire additional qualifications in order to get a job?

(Unemployed people or housewife, N=1225, share of total, %)



This cycle reveals that employed respondents express more interest in additional qualifications to advance in their current jobs, rather than to find a new job. Despite a strong incentive (such as getting a job), individuals still expressed less interest in getting trained. However, at regional level, the majority of participants were willing to train up in order to get a job, thus making up 57% of the region's population. Some 32% said they were unwilling to acquire additional trainings.

Concerningly enough, 39% of both North Macedonia and Montenegro would not be ready for additional qualification in return for employment, and at a similar rate, 37% of unemployed respondents from Albania share no interest in advancing their qualifications. Serbia (80%) is the most determined economy in pursuing further academic qualifications, followed by Bosnia and Herzegovina (61%) and Kosovo* (59%).

me=anon%7E36d66fd4.

DIGITAL LITERACY AND DIGITAL SKILLS

Digital skills are increasingly being seen as an asset in highly competitive labour markets. The vast majority of respondents in the region (80% to 89%, on average), however, did not receive any training to improve their skills on the use of computers, software or applications. One-fifth either learned themselves or through online courses. 17% received on-the- job training while 13% either participated into a self-funded training or such thing was provided by their employers. Participants who improved their digital-related skills by benefiting from other public programmes or organisations outside of their employers make up 11% of the region's population.

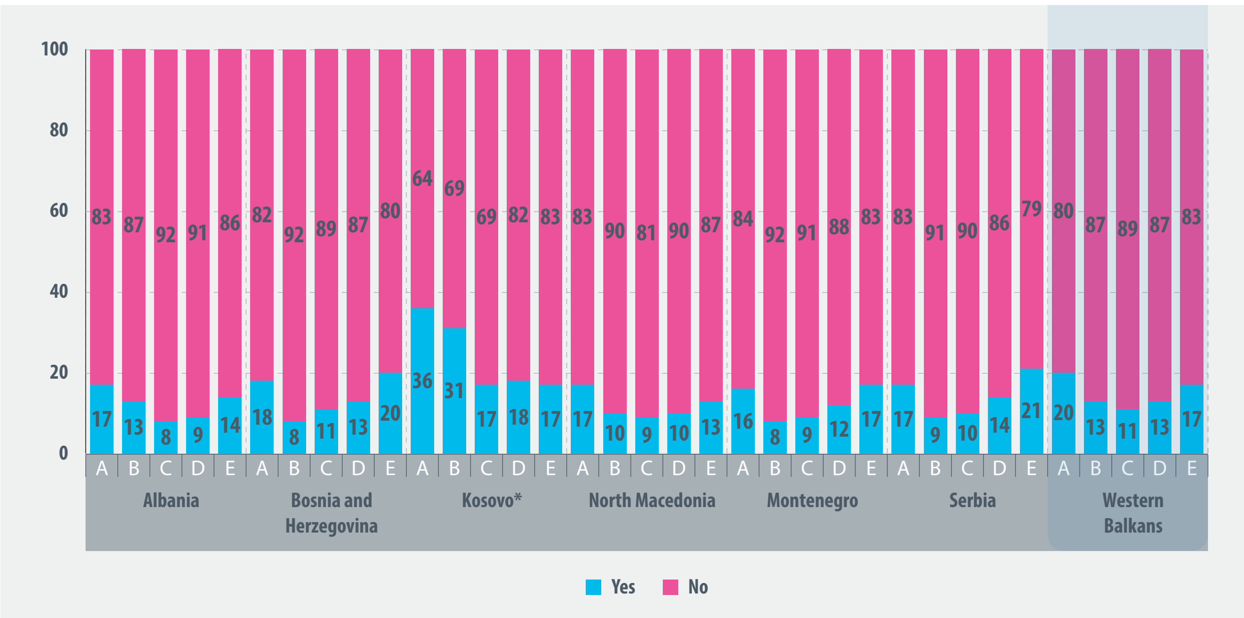
Overall, this round recorded a positive trend compared to the previous one in the share of respondents trained to improve their digital skills. Their share across all the eight categories surveyed has either doubled or tripled, returning to the 2019 levels, with 34% trained in other IT fields (24% more than in 2020).

The number of participants who used internet for communication purposes increased moderately (69%, from 65% in 2020). Those who used internet for entertainment (52%) and news (49%) were ranked second and third respectively, while 44% of citizens claimed to use internet to look for information for personal needs. A quarter to a third of the survey population use the Internet either for education (30%), work/business (27%) or shopping, including travel arrangements (24%). In general, more respondents use internet now compared to the last cycle of Barometer (33%, from 28% last cycle), while the share of those who don't use internet at all has decreased to 7% (from 12% in 2020).

Figure 54. Have you carried out any of the following learning activities to improve your skills relating to the use of computers, software or applications in the last 12 months?

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=6029, single answer, share of total, %)



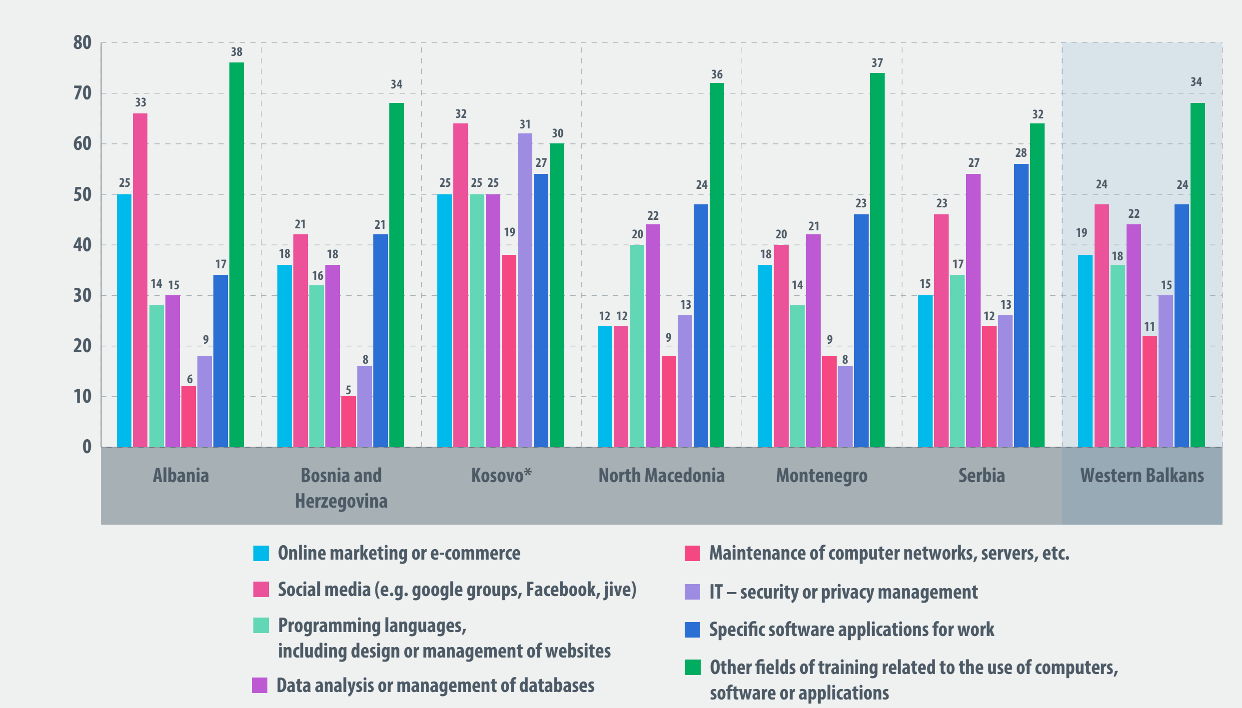
Similar to the previous round of the Barometer, at the regional level, a very large majority of respondents – between 80% and 89% of them – did not receive training during the last 12 months to improve their skills on the use of computers, software or applications. Of those who have received such training, 20% said they received free online training or self-study. The second most frequent form of training was on-the-job training (17%), followed by training paid by respondents themselves and training provided by employers (13% for both categories). Free training provided by public programmes or organisations other than employers was the least frequent form (pursued by 11% of respondents).

Within individual economies, free online training or self-study was pursued by over one-third (36%) of those polled in Kosovo*, as opposed to 16% in Montenegro, virtually a reversal of the situation in the previous round of the Barometer (39% in Montenegro and 14% in Kosovo*). The latter economy also leads by the share of respondents who pursued training paid by themselves (31%), as opposed to only 8% of those polled in Bosnia and Herzegovina and Montenegro. This is a significant improvement compared to last year, when a range of 5% and 18% of respondents in individual economies attended self-paid training.

A similar number of respondents (between 8% in Albania and 17% in Kosovo*) attended training provided by public programmes or organisations that are not their employers, considerably less than in 2020 (when it was between 5% and 23%). Furthermore, Albania (9%) and Kosovo* (18%) are found on opposite ends of the scale in terms of the share of respondents who received training to improve digital skills paid for or provided by their employers. This is significantly fewer than the rate of those polled in Montenegro (12%) who benefited in this way. Lastly, between 14% and 21% benefited through on-the-job training.

Figure 55. In which of the following fields relating to the use of computers, software or applications did you carry out the training in the last 12 months?

(Respondents who carried out training to improve their skills relating to the use of computers, software or applications in the last 12 months, n=1806, multiple answers, %)

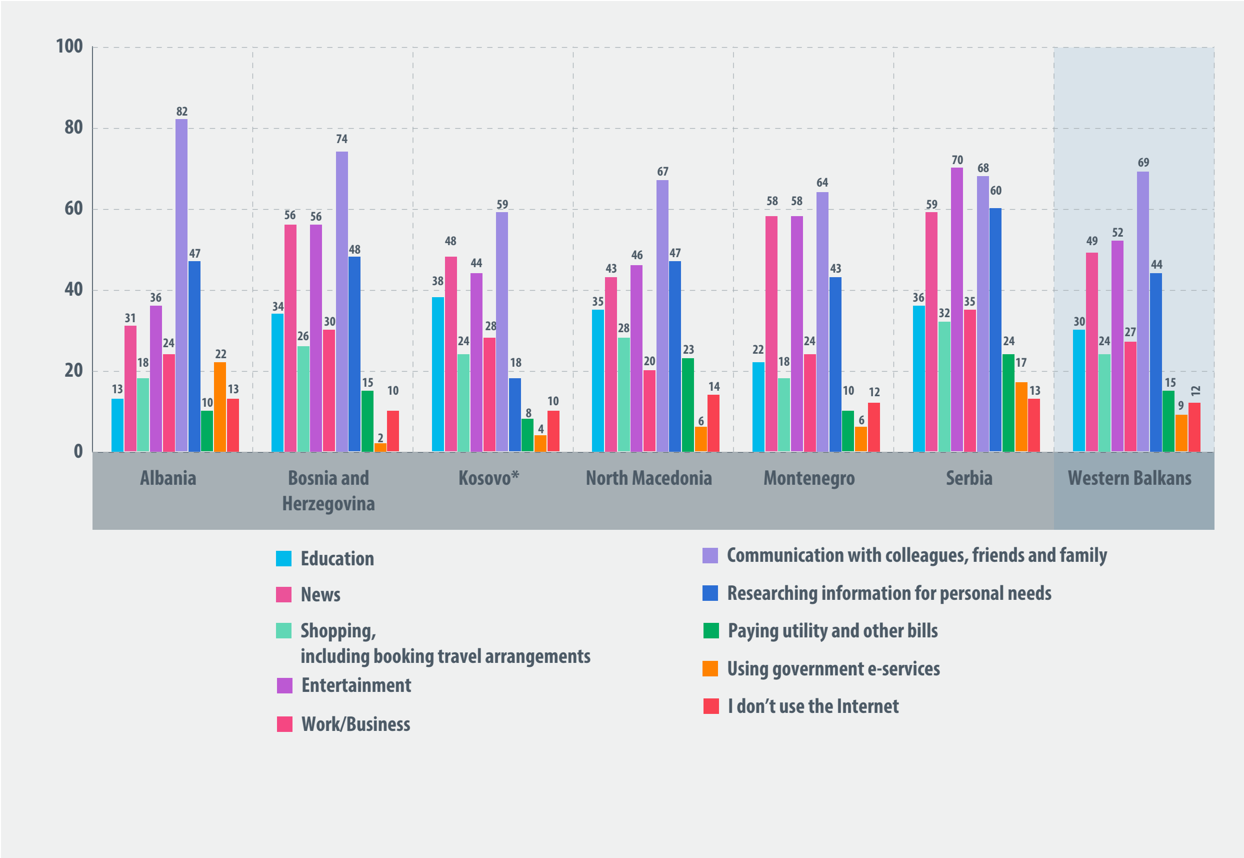


The region has, on average, seen an upward trend since the last round in the share of respondents who received training to increase digital skills. Their share across all the eight categories surveyed has either doubled or tripled, returning to the 2019 levels. The highest number, over one-third (34%), have attended training on other IT fields, 24% more than in 2020. Two second most popular areas of training, each having benefited a quarter of respondents, are social media and work-related software applications, a roughly 15% increase since 2020. Online marketing, programming languages and data analysis were three less popular areas of IT training (ranging between 19% and 22%), all nearly three times more than a year ago.

At economy level, Albania (33%) and Kosovo* (32%) became leaders by the share of respondents who got trained on social media. They replaced Montenegro, whose share on this nevertheless increased significantly, from 11% to 20%, while North Macedonia has the lowest share in the region on this (12%), despite an 8-point hike (from 4% to 12%). Similarly, a quarter (25%) of their survey participants received training on online marketing, Albania (10% in 2020) and Kosovo* (4% in 2020) also made huge strides to become leaders in the area of online marketing. This group of respondents outnumbers those in North Macedonia, which, despite a 5-point increase to reach 12%, fell to the last place. In other results, Serbia leads with training of their survey population on data analysis or database management (at 27%), and Kosovo* on IT security or privacy management (at 31%), work-related software applications (at 27%) and programming languages (at 25%).

Figure 56: Have you used the Internet for the following?

(All respondents, n=6029, multiple answers, %)

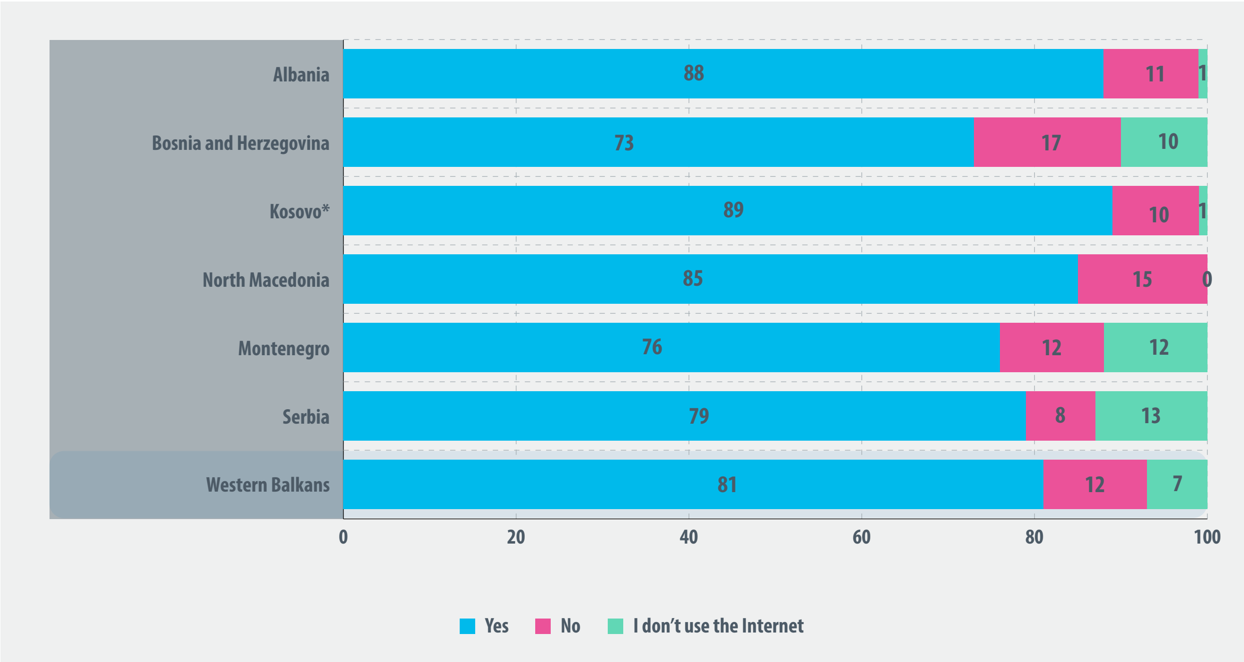


The use of Internet predominantly for communication has increased moderately, by 4%, from 65% in the last round. The second and third most common uses, by about half of participants each, is entertainment (52%) and news (49%), followed by searching information for personal needs (44%). A quarter to a third of the survey population use the Internet either for education (30%), work/business (27%) or shopping, including travel arrangements (24%). In other notable trends compared to the 2020 round, the share of those polled using the Internet for education and for browsing news fell by 8% each (from 38% and 57%, respectively). The share of those using it for entertainment remained the same (52%), and the same is the case with the level of its usage for government services and paying bills, which is still rather low (9% and 15%, respectively).

At the economy level, Albania and Kosovo*, on opposite ends of the scale in terms of the share of those using the Internet for communication, have both seen trends by roughly the same margin: a 17-point hike in Albania (82%, from 65%) versus a 16-point decline in Kosovo* (59%, from 75%). Albania also has the highest share of participants using the Internet for government services (22%), while Bosnia and Herzegovina has the lowest (2%). Furthermore, Serbia has the biggest group of respondents in the region using it to get informed (59%), while 31% do so in Albania. Serbia leads in terms of Internet use to find information for personal needs (at 60%), whereas only 18% do so in Kosovo*, recording an upward trend (by 9%) in the former and a downward trend (by 15%) in the latter. North Macedonia has the highest share of Internet nonusers (14%).

Figure 57: Are you satisfied with your Internet connection?

(Those who have used Internet, N=5657, single answer, share of total, %)



On average, citizens in the region are almost as satisfied with the quality of Internet connection (81%) as in the last round (85%), as opposed to 12% (3% less than in 2020). Of the six individual economies, Albania retained the highest percentage of satisfied ones (88%, the same as in 2020), while Bosnia and Herzegovina has highest share of dissatisfied ones (17%). The highest share of dissatisfied ones a year ago was 25% (in Montenegro).

Figure 58: How many hours do you spend on Internet (e.g. on social media platforms, online shopping, web browsing, online banking, etc.)?

(All respondents, N=6029, single answer, share of total, %)

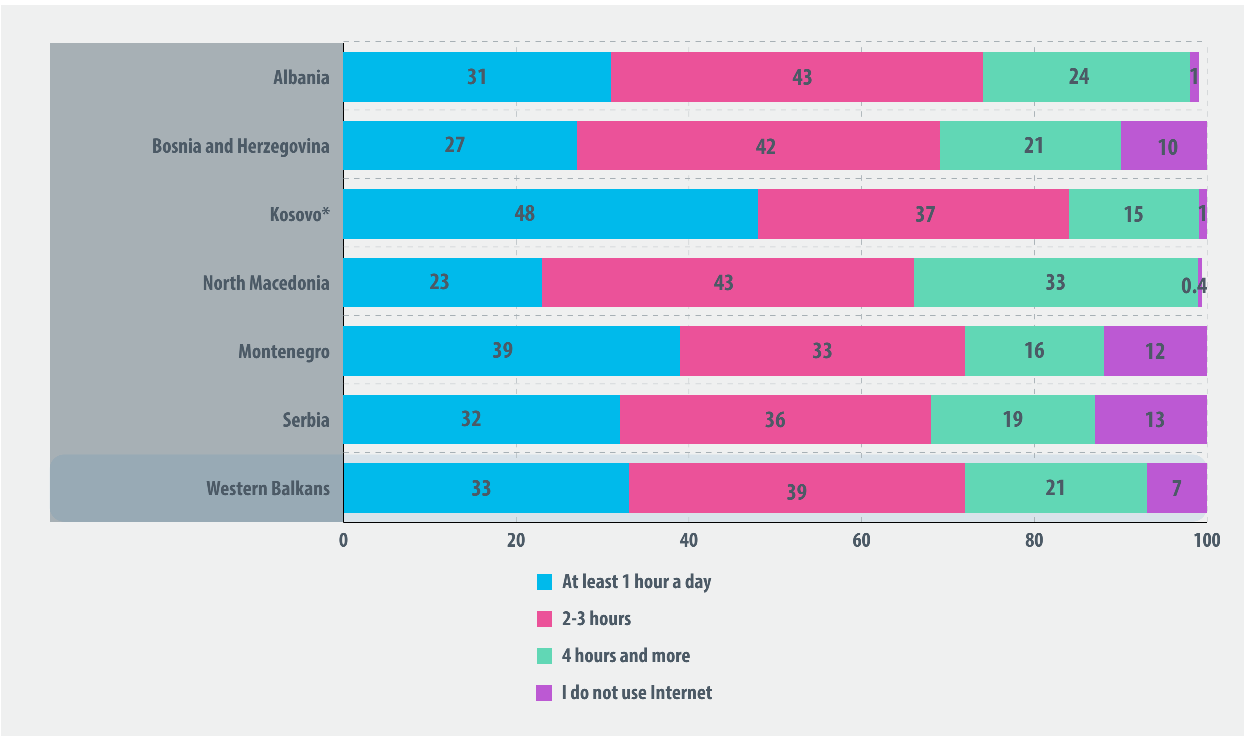
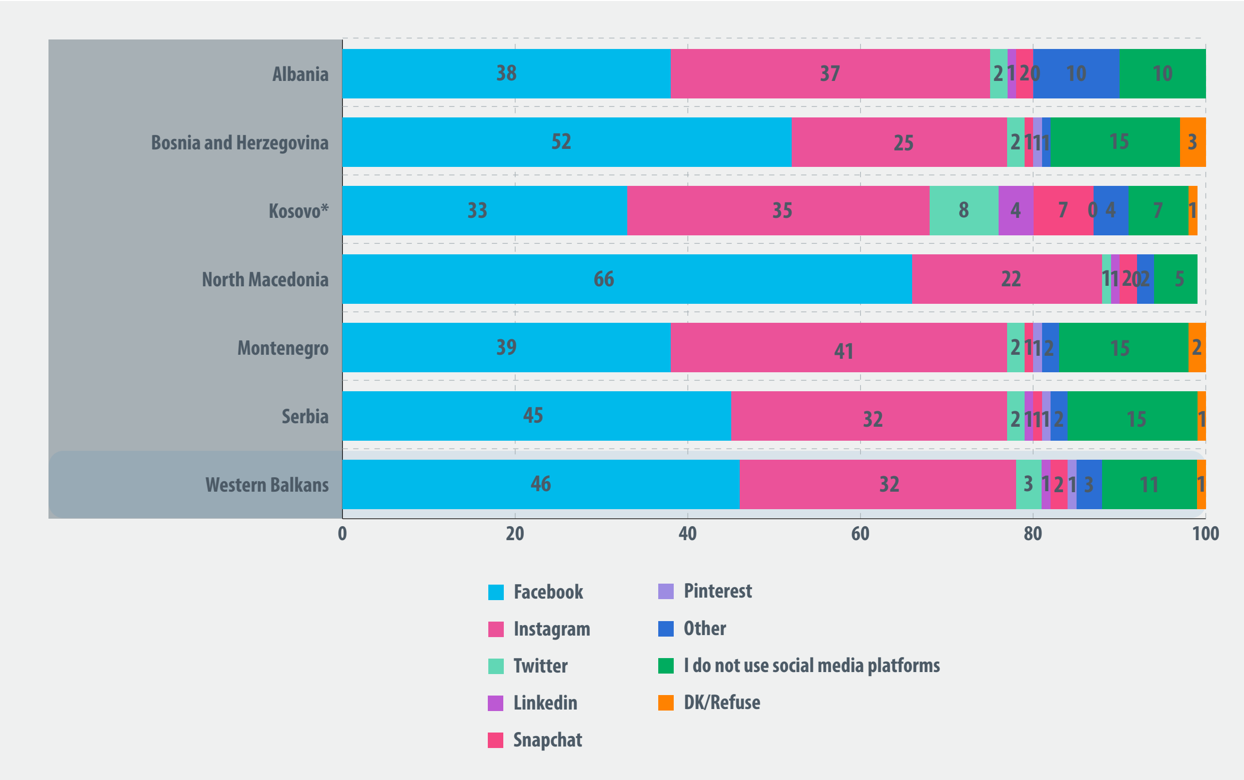


Figure 59: Which social media platform do you use the most?

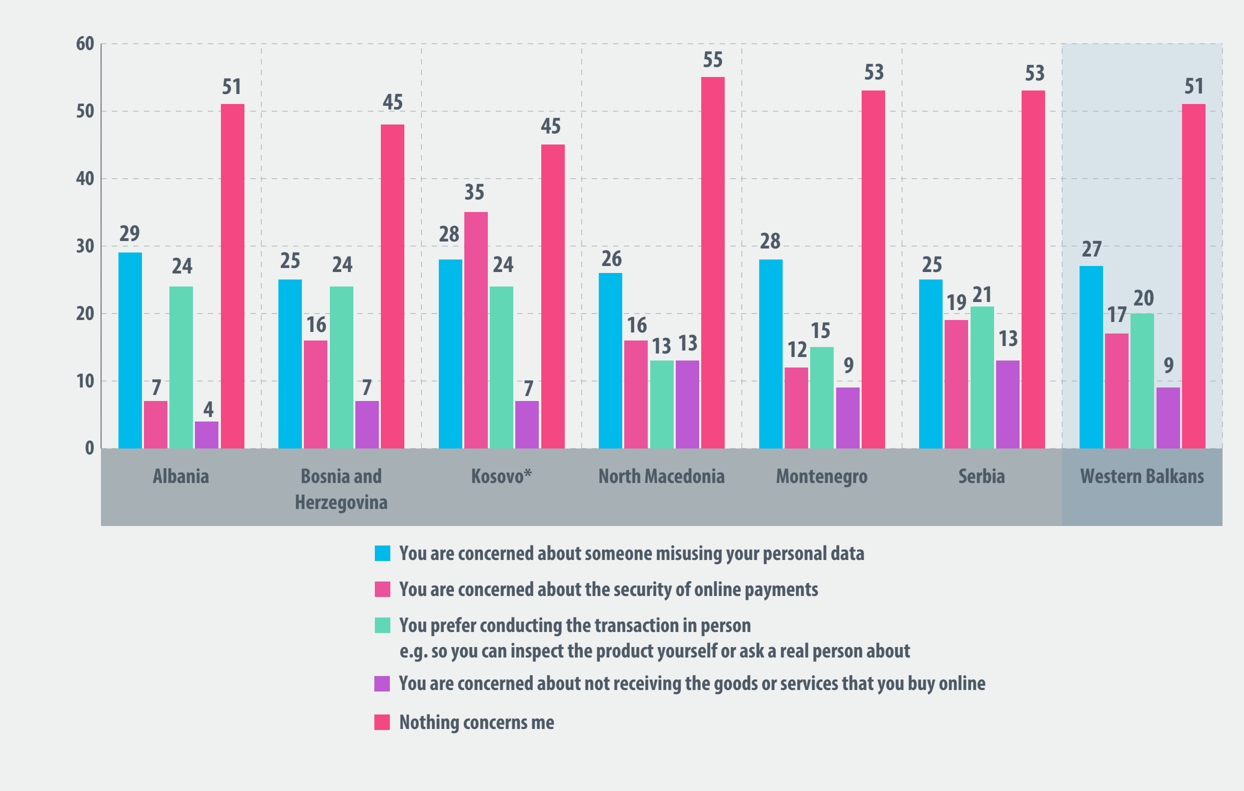
(Respondents who use internet, N=5304, single answer, share of total, %)



Facebook (46%) remains the predominant media platform used by participants, followed by Instagram (32%) as the second most used social platform. Twitter, LinkedIn, Snapchat and Pinterest remain seldom used by the Western Balkans, thus consisting only 1%, 2%, and 1% of the population respectively. North Macedonia is again the biggest proponent of Facebook (66%), while Montenegro (41%) and Albania fancy Instagram more. A peculiar element of Serbia, Montenegro and Bosnia and Herzegovina is that 15% of their populations do not use social media platforms at all.

Figure 60: What concerns do you have, if any, about using the Internet for things like online banking or buying things online?

(Those who have used Internet, n=5304, multiple answers, share of total, %)

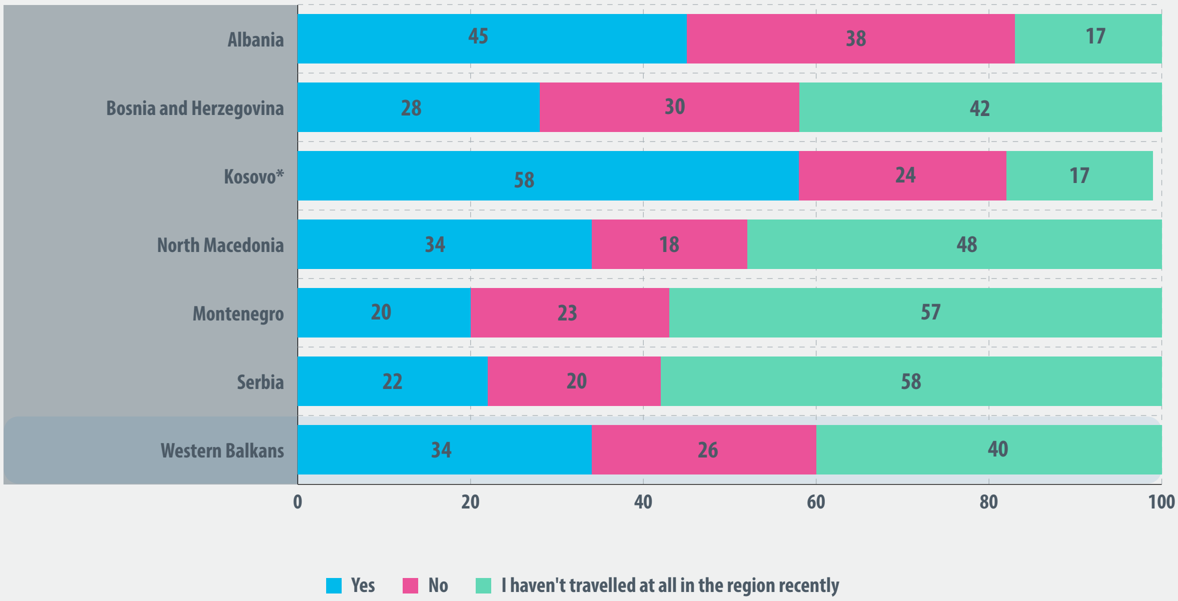


While public awareness of data misuse by third parties spiked last year, in this cycle respondents were less concerned of their information being stolen (27%, from 37% in 2020). 17% of citizens were reluctant of making any payment online due to perceived weak security, while 20% preferred to conduct transactions in person and have their product personally inspected. Only 9% were worried of potential online scams, and roughly half of the population were not concerned over the security and reliability of internet settings.

From the perspective of individual economies, North Macedonia (55%), Montenegro (53%) and Serbia (53%) are fondest of online services, thus showing no concern of any potential security-related risks. Participants from Kosovo* (28%) and Albania (29%) feared that their personal data could be misused by third parties. At the same time, Albania (24%), Kosovo* (24%) and Bosnia and Herzegovina (24%) prefer to conduct their purchases in person. While the percentage of citizens who worry that they will never receive their goods was low, North Macedonia (13%) and Serbia (13%) where somehow more sceptical of webpages' reliability.

Figure 61: Do you still turn off mobile data when you are roaming in the Western Balkan region?

(All respondents, N=6029, share of total, %)

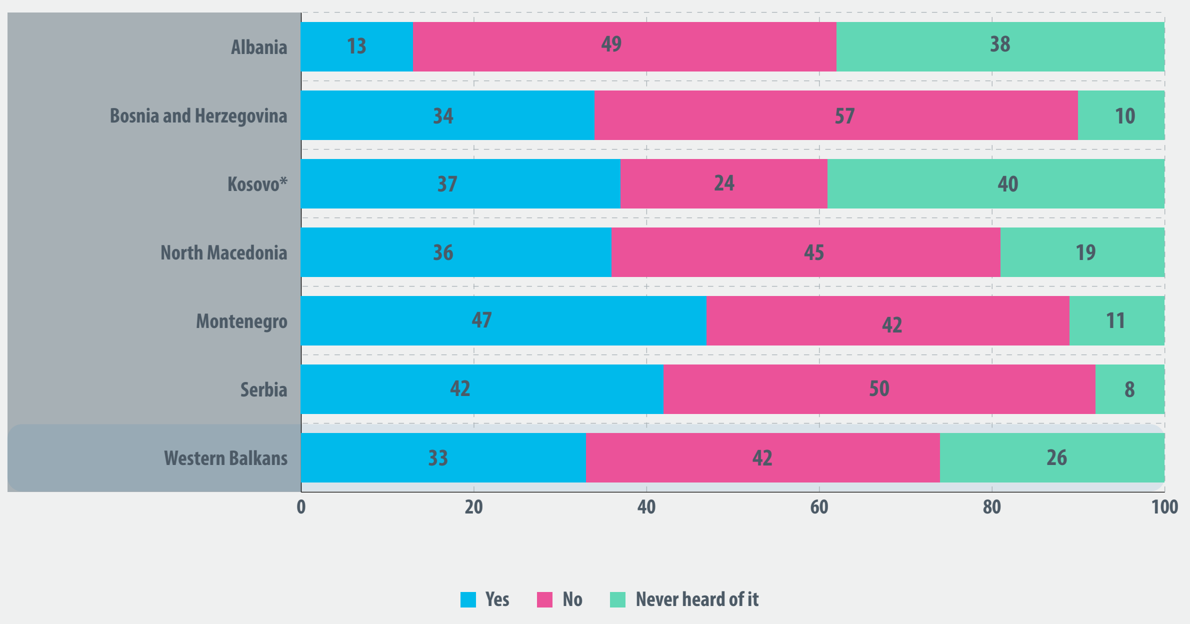


An incrementing number of participants (34%) admitted turning off mobile data when roaming in the Western Balkans. Roughly one-fourth of respondents on the other hand said they do not deactivate their mobile internet. Findings from this cycle recorded two major groups of citizens: while as mentioned, one-third of citizens turn their mobile data off, 40% hadn't recently travelled in the region.

Kosovo* (58%) shelters again the highest proportion of respondents who deactivate their mobile internet when travelling in the Western Balkans, albeit at a much lesser extent (up from 78% in 2020). Albania on the other hand is still the economy with most respondents who don't switch (38%) mobile data off. Meanwhile, respondents from Serbia (58%) and Montenegro (57%) admitted to not have travelled anywhere in the Western Balkans lately.

Figure 62: Are you familiar with how Roam Like at Home for Western Balkans works?

(Respondents who turn off mobile data when roaming in the WB region, N=2051, single answer, share of total, %)

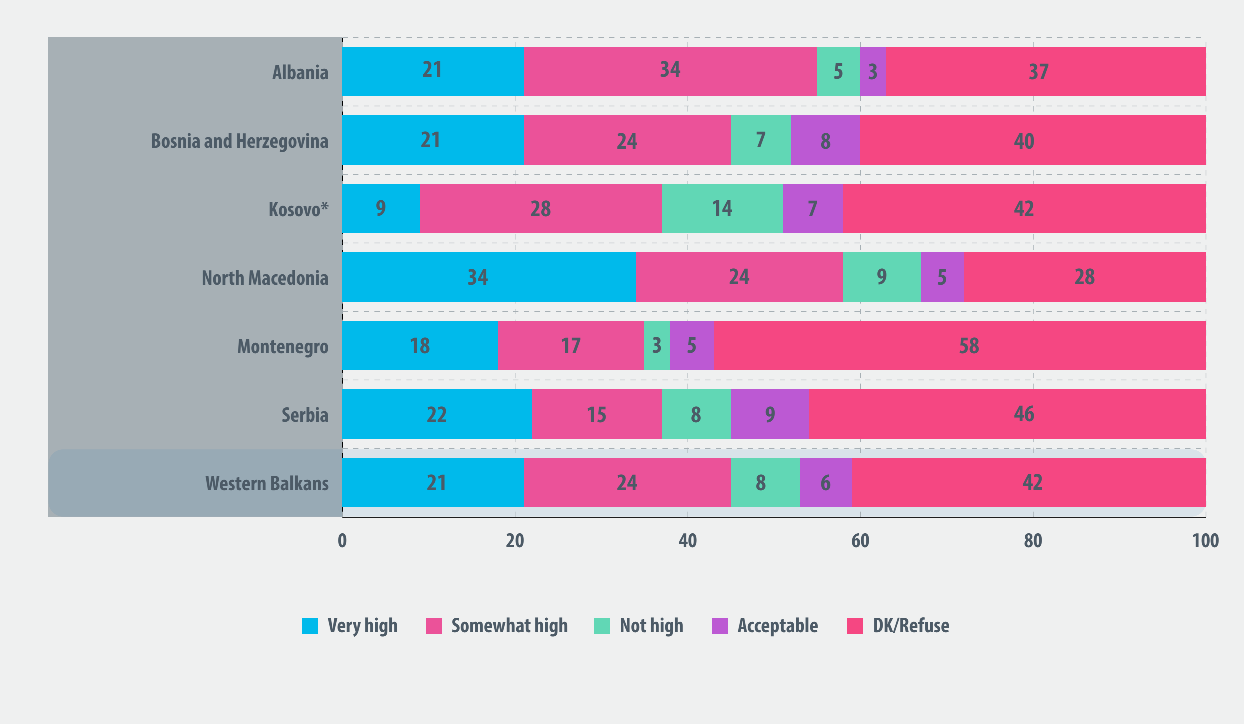


The Roam at Home model introduced in the region from 1 July 2021 that eliminated additional roaming costs within the Western Balkans, was familiar to one-third of respondents. Some 42%, heard of the model but they didn't know how it functioned, while 26% were not aware that the model existed.

At economy level, Montenegro (47%) and Serbia (42%) knew the most about how the Roam like at Home model worked, while only 13% of their counterparts in Albania had the same information. Meanwhile, more than half of participants from Bosnia and Herzegovina (57%) and 50% of respondents in Serbia didn't know its operating setting but were aware of the benefits. On the other hand, 40% of respondents in Kosovo* and 38% of respondents in Albania heard for the first time about Roam Like at Home model in this cycle of Barometer's survey. Although Roam Like at Home model fully entered into force on 1 July 2021, the number of people not informed on it is somehow justifiable as 40% of the respondents had not recently travelled in the region and consequently did not make use it.

Figure 63: How would you consider phone costs when travelling to EU?

(All respondents, N=6029, share of total, %)

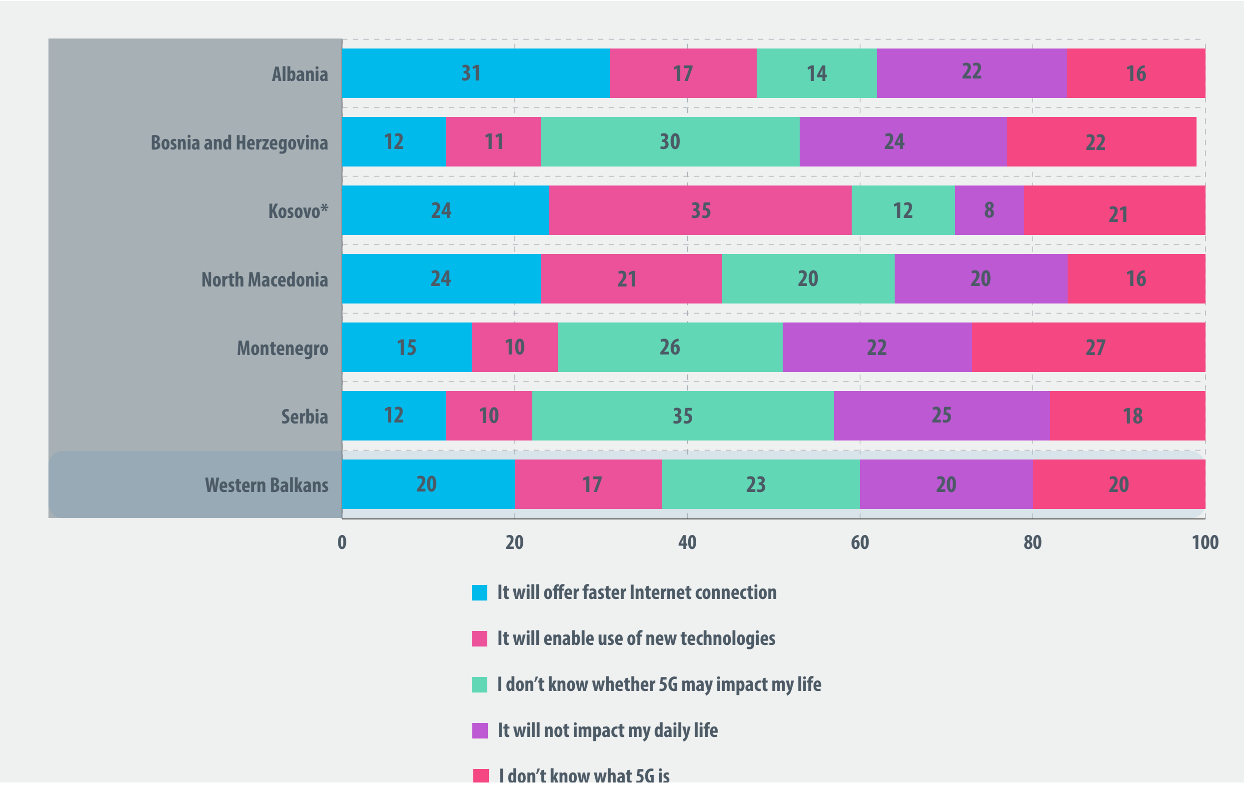


Phone costs within the EU are still considered high by 45% of Western Balkans. Some 14% of participants claimed that mobile costs were reasonable. On the other hand, almost half of the population didn't have an opinion whether the charged phone bills were reasonable or not.

In terms of individual economies, North Macedonia is the biggest criticiser of EU phone costs, as 58% of its respondents considered them expensive for their pockets. On the contrary, only 35% of respondents in Montenegro shared the same opinion with their counterparts from North Macedonia, while 58% didn't know or refused to answer. Interestingly, one-fifth of citizens from Kosovo* believed that phone costs when traveling to EU were relatively affordable.

Figure 64: Will 5G impact your daily life?

(All respondents, N=6029, share of total, %)



Advantages of using 5G as a technology for broadband cellular networks range from faster internet connection to enabling the use of other new technologies. The region's perspective over 5G's benefits however, differs. While one-fifth of respondents expected a faster internet connectivity through 5G and 17% were confident of using the newest technologies, 23% didn't know whether 5G would actually improve their life. 20% were reluctant that 5G would somehow affect their daily lives.

Kosovo* remains the biggest cheerleader of 5G (59% in favour of 5G), though it recorded a 4-point subtraction compared to 2020. Albania is second with 48% of its population being excited about faster internet connection and the use of new technology through 5G. The other side of the coin is represented by Serbia (25%) and Bosnia and Herzegovina (24%) highly doubting that 5G would positively impact their routine. Both economies also had the largest share of participants who weren't sure of 5G's benefits, while 27% of respondents in Montenegro never actually heard of 5G.

ATTITUDES TOWARDS MOBILITY

Albeit at a slight rate, the number of respondents who were considering leaving their respective economies for better opportunities abroad has increased (39%, from 37% in 2020). On the other hand, 54% were not considering the option of fleeing their economies while less than one-tenth (8%) did not think whether they would go abroad and work or not.

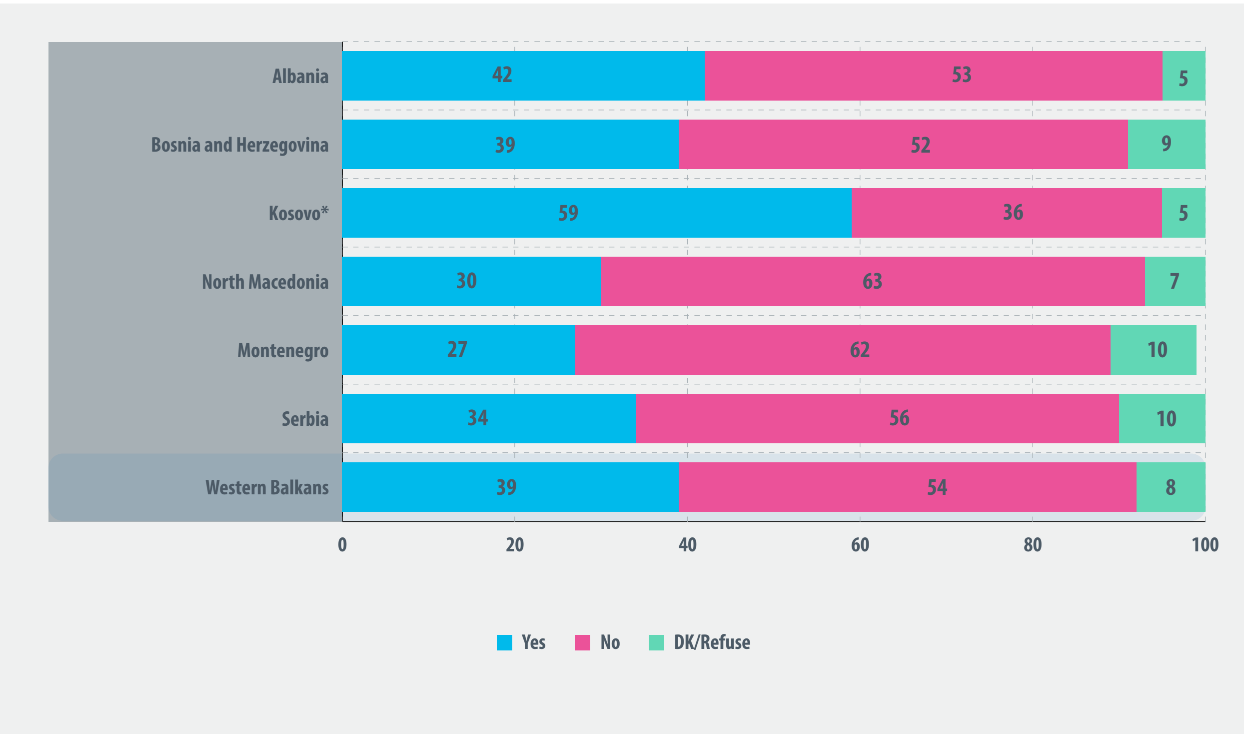
At economy level, Kosovo* is home to the highest share of respondents who were considering leaving their economy (59%) while citizens from the North Macedonia and Montenegro were the fondest of their economies, with 63% and 62% respectively claiming that they would not leave their homes.

For those who were thinking of leaving, the EU remained their number one go, as 70% chose EU over the US, or the region. The US remains the second most preferred place to work (17%), while the share of those who chose Western Balkans reached 9%.

The movement of people within the region remained at relatively low levels, as 65% of all respondents did not travel at all during the last 12 months. Montenegro (12%), Serbia (12%) and Albania (11%) were the most visited economies by their regional counterparts, while Kosovo* (5%) was the least visited. From those who had travelled within the region, tourism was the main purpose for 53% of respondents, while 51% visited their friends or family within the Western Balkan.

Figure 65: Would you consider leaving and working abroad?

(All respondents, N=6029, single answer, share of total, %)

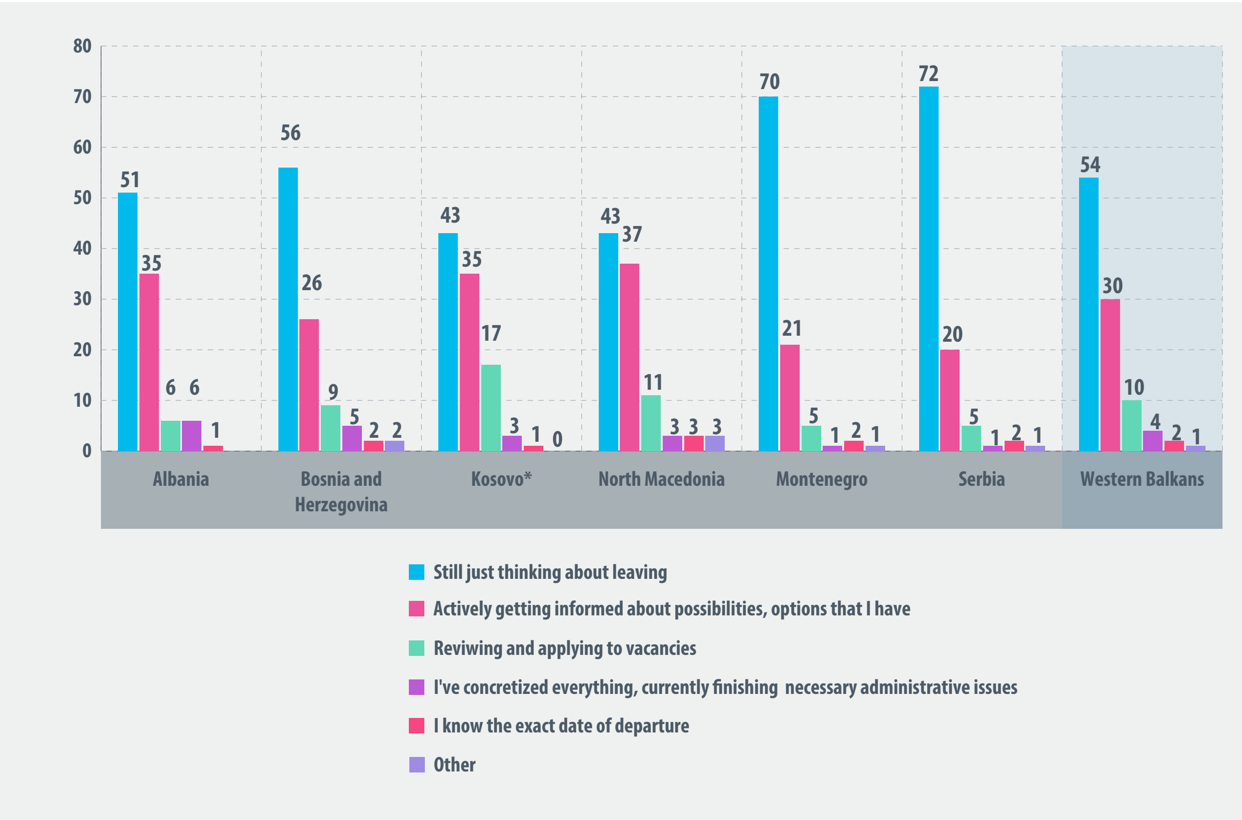


The share of Western Balkan population considering leaving their respective economies and working abroad has slightly increased this year compared to 2020, from 37% to 39% of respondents. Likewise, the number of those not considering such an option has increased for 1%, to 54%, while 8% (2% less than in the previous round) do not know whether they will leave or did not answer the question.

Looking at individual economies, Kosovo* has replaced Albania as the economy with the highest number of respondents, 59%, considering leaving. Kosovo* is also the economy with the largest increase, by 27% from 32% in 2020, in the number of respondents considering such an option. While Albania has seen a slight increase, by 4%, of its respondents wanting to leave, North Macedonia has kept the position of the leading economy in the region by the share of those not intending to leave, 63%, only 2% less than in 2020.

Figure 66: In what phase of consideration are you?

(Those who consider living and working abroad, n=2293, single answer, share of total, %)

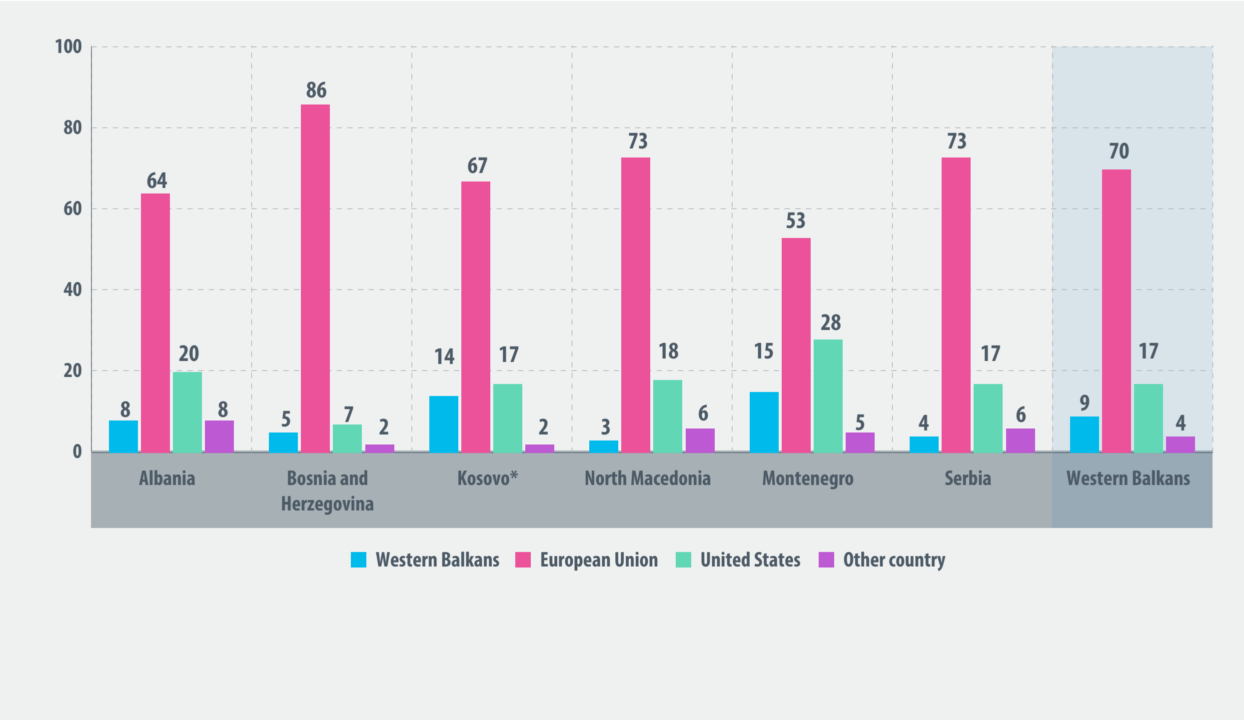


Over half of Western Balkan citizens polled are at an early stage of taking any action towards this: 54% of them are still only thinking about it. Those considering such an option are more certain about it, since the number of respondents only thinking about it has decreased by 9%, from 63% in the previous round, and the number of those actively informed on options to leave has increased, from one-fourth of participants in the previous round to around one-third this year. 10%, only 1% more than in the previous round, said they were applying for jobs abroad and the same proportion, 2%, knew their exact date of departure.

Montenegro, at 70%, has overtaken Albania to become the second regional economy whose respondents are just thinking about leaving to work abroad, while Serbia, at 72%, has remained the leading economy in this regard, a 5% increase from the previous round. Moreover, North Macedonia has overtaken Kosovo* in terms of the share of respondents who are getting actively informed about options to leave, with 37% of respondents having stated so, followed by Kosovo* and Albania (both at 35%), while Montenegro and Serbia are at the other end of the scale in this regard. Kosovo* has overtaken Albania in terms of the share of respondents applying for jobs abroad – 17% of them – while such a number in Albania has almost halved compared to the previous round, from 11% down to 6%. Albania also has the highest share of respondents who have everything set and are finishing administrative issues (6%), followed by Bosnia and Herzegovina (with 5%).

Figure 67: Where do you consider living and working abroad?

(Those who consider living and working abroad, n=2293, single answer, share of total, %)



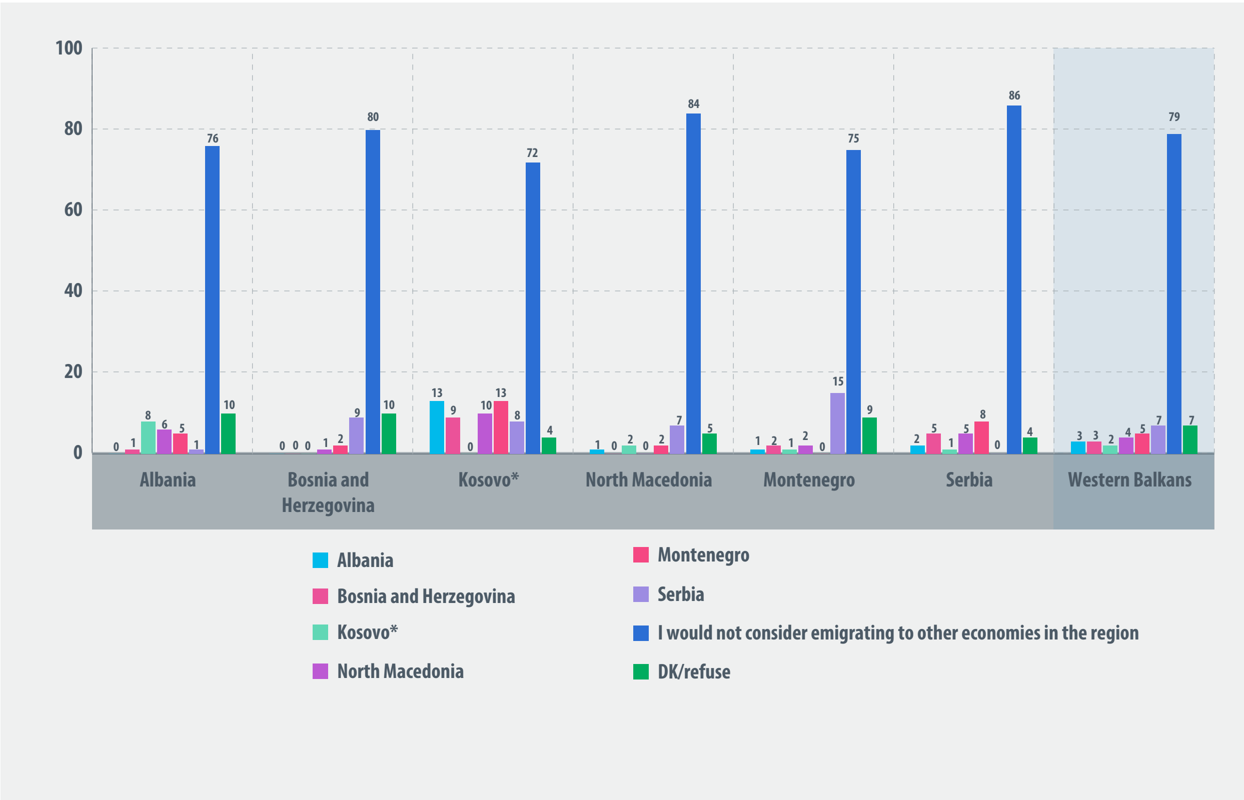
In terms of destinations of those considering living and working abroad, the EU remains the top destination for the region on average, with 70%, only 2% less than a year ago. The share of participants considering emigrating to the United States has also decreased by 2% from the previous year, to 17%. Likewise, the share of those considering emigrating within the region has increased by the same slight margin, to 9%. Only 4% of those polled, 1% more than in the last round, said they are considering emigrating to another economy.

Within individual economies, Bosnia and Herzegovina remains the leading one whose respondents (86%) prefer to emigrate into the EU for employment, followed by North Macedonia and Serbia (both at 73%). Montenegro, with over half of participants preferring the EU, lies at the other end of the scale on this, while North Macedonia has seen the most significant decrease, by 9%, in the share of participants considering emigrating into the EU, from 82% to 73%.

Montenegro remains the leading regional economy in terms of the share of respondents considering emigrating to the US, with almost one-third having stated so, 4% less than a year ago, followed by Albania, while Bosnia and Herzegovina has the lowest share of respondents of this category. Kosovo* (at 14%, the same as a year ago) remains the leading economy in terms of the share of participants intending to emigrate within the region, while such a share in Albania is the same as of those considering emigrating elsewhere.

Figure 68: Would you consider living and working in another place in the Western Balkan region having your academic and professional qualifications recognised in all WB economies? If yes, where?

(All respondents, N=6029, multiple answers, %)

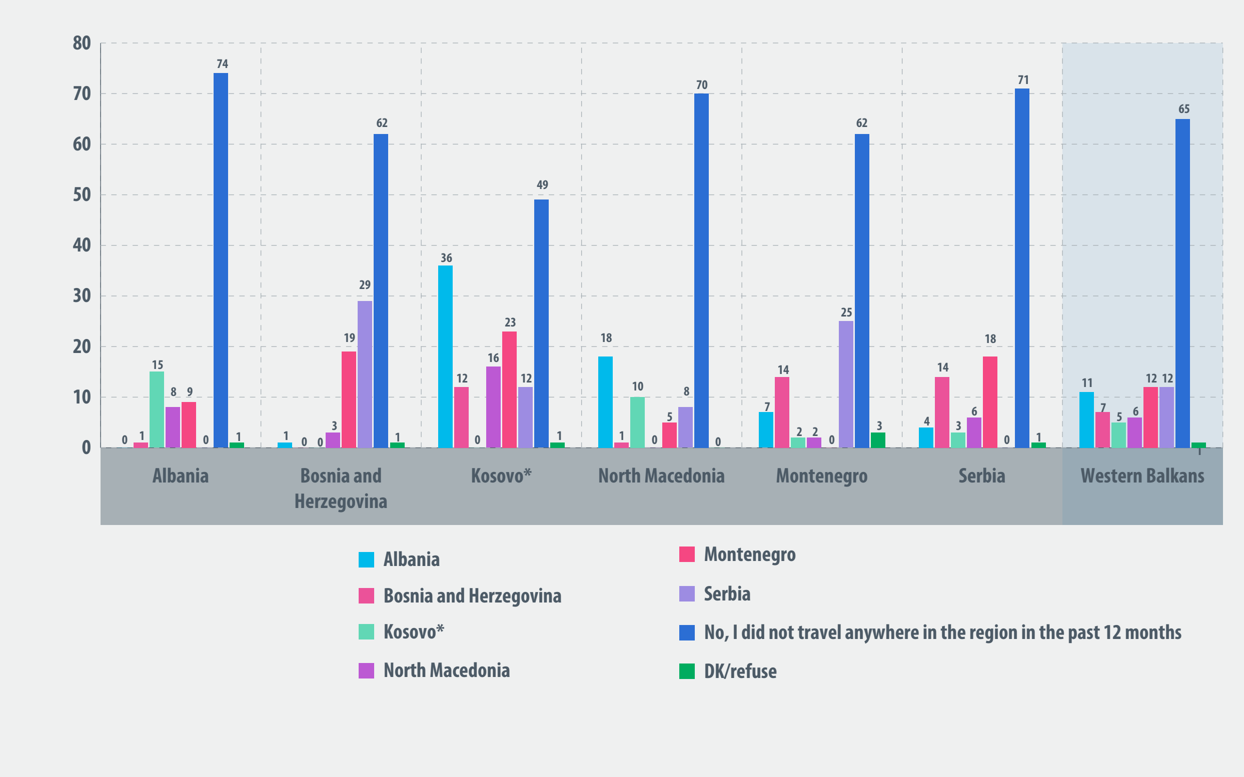


There is no significant change from the previous round in terms of preference of Western Balkan citizens to emigrate within the region for work: 79% of respondents, on average, said they would not consider such an option, an incremental increase of 2 percentage points.

On the other hand, albeit a slight decrease by 4%, Serbia, at 86%, remains a leader in terms of respondents not considering such an option, followed by North Macedonia and Bosnia and Herzegovina, while Kosovo*, with 72%, has the lowest number of respondents who have stated so. Of those considering emigrating within the region, Montenegro leads, with 15% preferring Serbia as the economy of their destination. It is followed by Kosovo*, where the same number of respondents (13%) prefer Albania and Montenegro as their destination.

Figure 69: Did you travel anywhere in the region in the past 12 months? If yes, where?

(All respondents, n=6029, multiple answers, %)



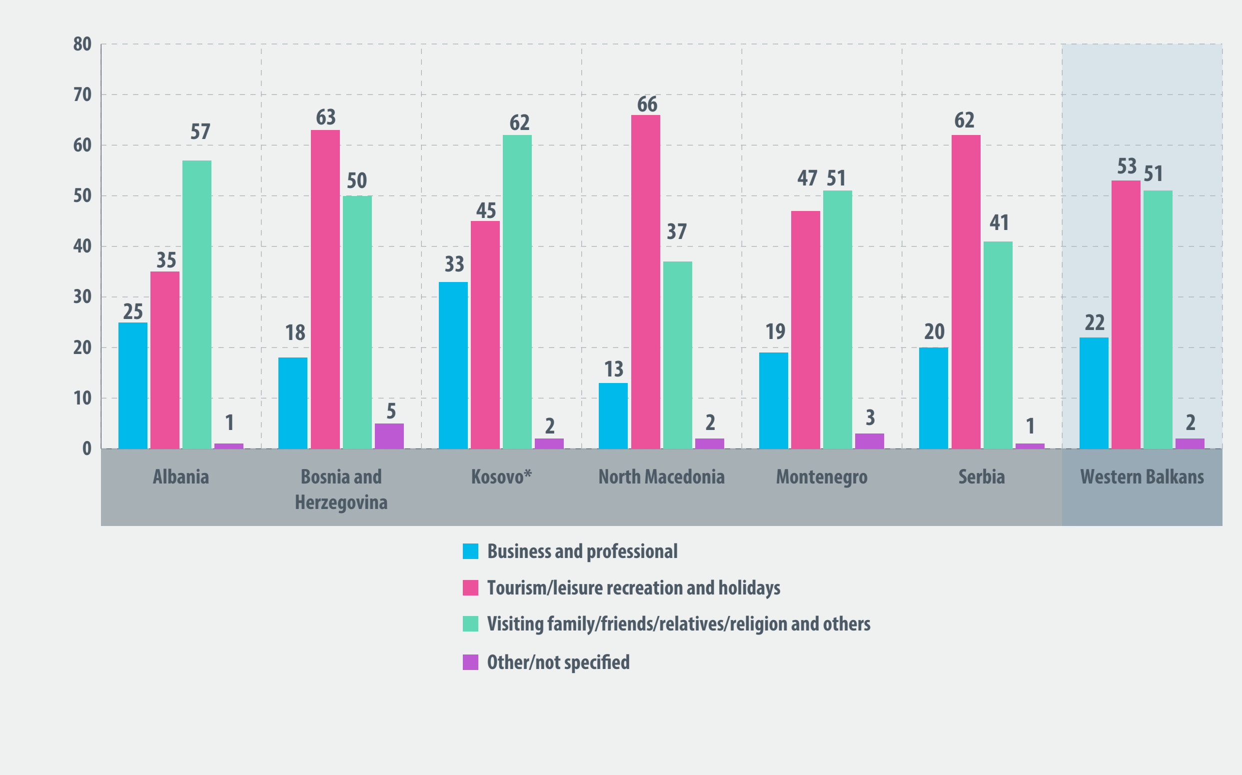
The region kept the same level of openness since the previous year when measured by the share of people who have not travelled at all within the region during the last 12 months: 65% of them, on average, 1 percentage point less than in the previous edition. Montenegro, Serbia, and Albania (with 12% for the two former and 11% for Albania) were, on average, the most visited in the region by people of the region, while Kosovo* (at 5%) was the least visited by visitors from other regional economies.

Albania took over Serbia as the economy with the highest number of those polled who have not travelled anywhere abroad in the region (74% of them), yet indicating a significant openness compared to the previous edition when Serbia had 86% of respondents in this category, or 12 percentage points more. For Albania itself, this is a 7% decrease of the share of respondents in this category. Kosovo*, while keeping its place with the lowest number of those polled who have not travelled at all elsewhere in the region, has seen a remarkable 20-point increase, from 29% to 49%.

Conversely, Kosovo* has the highest number of survey participants who have travelled to another region's economy, with 36% having travelled to Albania, despite a very remarkable 27% decrease. It is followed by Bosnia and Herzegovina, with about one-third of respondents having visited Serbia, a significant 13-point increase. In other notable findings, Serbia was not visited by any survey participant from Albania, and Kosovo* was not visited by any of them from Bosnia and Herzegovina.

Figure 70: What was the purpose of your travel?

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



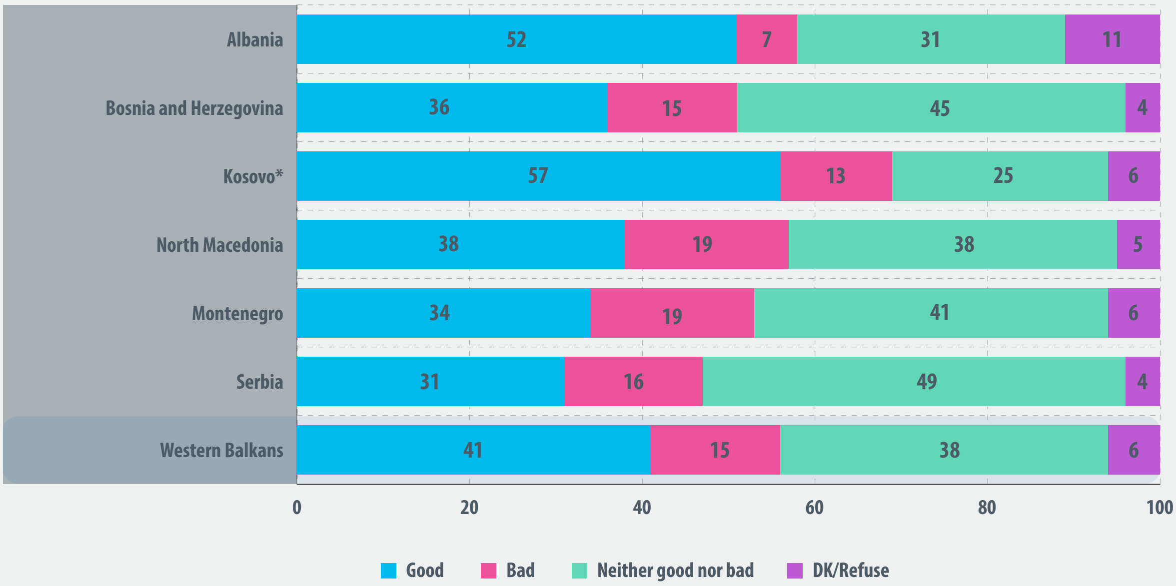
There is a significant increase of 16 percentage points of the share of respondents within the region who have travelled to other economies in the region for tourism purposes, thus reaching the relative majority of 53% and taking over those who claim to have travelled for visiting purposes. Similarly, the share of the survey population in the latter category has declined since the previous edition of the Barometer by 14%, from almost two-thirds to just over half (51%) of them. More than one-fifth of those polled who have travelled have done so for business and professional purposes, 6% up from the previous round.

Within individual economies, North Macedonia is the leading economy in the region by the overall number of respondents who have travelled, with two-thirds having done so as tourists, closely followed by Bosnia and Herzegovina (63%) and Serbia (62%). While the share of respondents in North Macedonia in this category has increased moderately, by 9%, Kosovo* leads in the share of the survey population who have travelled for visiting purposes (62%), albeit the largest drop in this category, by 27%.

Kosovo* has made the most significant hike, by 33% (from 12% to 45%), in the share of survey participants who have travelled as tourists, while Albania lies in the other end of the scale. Kosovo* leads in the share of respondents who have travelled for business purposes, with one-third having done so (a 22% hike). North Macedonia has the smallest share of those polled in this category (13%).

Figure 71: What do you think about people from other parts of the region coming to live and work in your economy? Is it good or bad for your economy?

(All respondents, N=6029, share of total, %)



Western Balkan economies have preserved more or less the same level of openness to people from other economies of the region, with under half (41%) of them considering it a good thing, only 1% less than in 2020. The share of neutral ones has decreased by 4%, to 38%, whereas the share of those considering it a bad thing has increased by 5 points, from 10% to 15%.

In this edition, Kosovo* has replaced Albania to become the most open economy in this sense, with nearly six out of ten respondents (57%) considering it a good thing for people from other parts of the region to come to live and work, a 12% hike. It is followed by Albania, with just over half of respondents considering it a good thing, slightly more than in 2020. Serbia, with 31% considering this a good thing (8% less than in the previous round), has replaced Montenegro to become the least open economy in this sense. Serbia also has the highest share of respondents, around half of them, who find people from other parts of the region living and working there neither good nor bad. Kosovo*, with one-fourth of neutral respondents (21% less than in the previous round), lies on the other end of the scale.

ATTITUDES TO SOCIAL INCLUSION OF VULNERABLE GROUPS

While governments' economic affirmative measures for marginalised groups such as people with disabilities, displaced persons and refugees, Roma and other minorities are widely supported in the region, there is a slight decline in favourable attitudes among respondents. Overall, 90% of them support such measures for the disabled. On the other hand, 74% support employment-related affirmative measures for other minorities (from 81% in 2020), 74% for Roma minorities (79% in 2020) and 73% (78% in 2020) for displaced persons or refugees. The share of respondents who support affirmative housing measures for other minorities remains high (70%), though it contracted significantly, by 10 points, since 2020. Providing housing support for people with disabilities is most supported (90%) as an adequate affirmative measure.

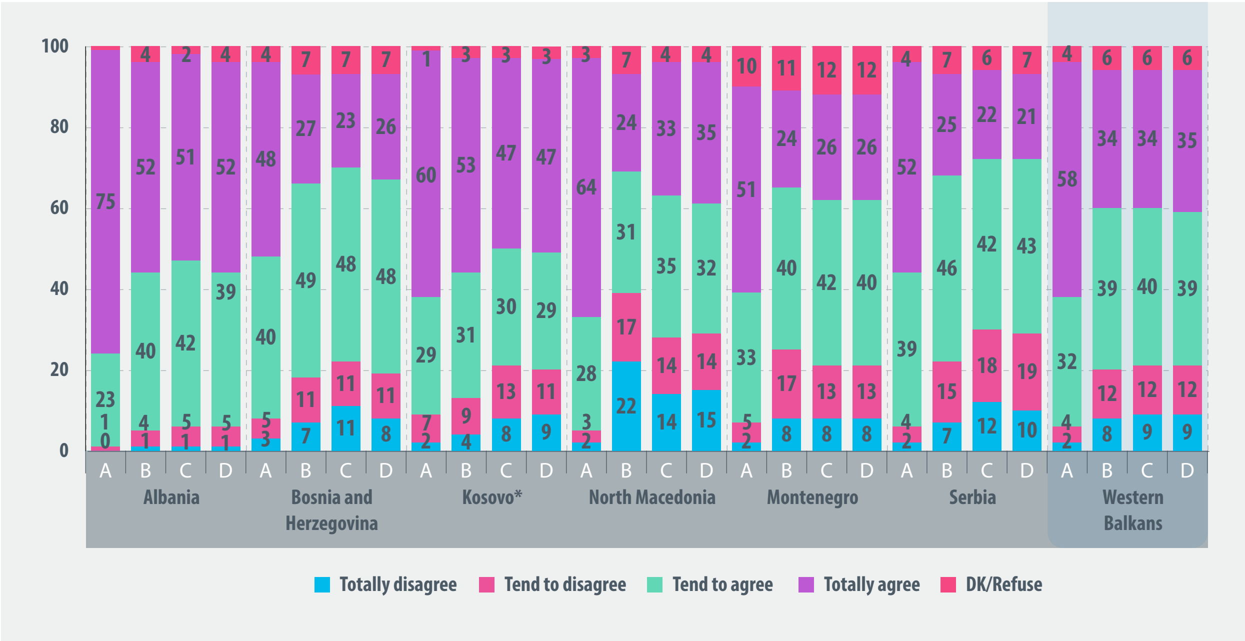
Though prejudice towards the Roma community remains at worryingly high levels, such negative phenomenon has slightly decreased in this cycle. 64% (from 68% in 2020) would not feel comfortable to marry or have their children marry Roma, while 36% were uncomfortable with the idea of renting housing to Roma. Going to the same school as Roma children seems to be considered a more acceptable idea for respondents in the region, as 70% felt comfortable with such thing while 21% were not okay with sharing the same education premises with children from the Roma community.

Individually speaking, most economies ranked "their children going to school with Roma children" as the most acceptable idea. Working with members of Roma communities was ranked the second most acceptable, followed by buying products from them and maintaining friendship with them. On the other hand, marrying someone from the Roma community was considered the most radical idea, followed by renting a house to a Roma or even inviting someone of the Roma community into participants' houses.

Figure 72: 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 D – Other minorities

(All respondents, N=6029, scale from 1 to 4, share of total, %)



With regard to promotion of opportunities for equal access of four categories of vulnerable groups – the disabled, including persons with special needs; displaced persons and refugees; Roma; and other minorities – by Governments through affirmative measures for their employment in the public and private sectors, a notable trend compared to the previous round across the board is a slight decline of favourable attitudes. Overall, 90% of respondents, 2% less than in 2020, favour such measures for the disabled, including those with special needs. The proportion of survey participants favouring affirmative measures for employment of members of the three remaining vulnerable groups has dropped by 5% compared to the previous round: 74% for other minorities (81% in 2020), 74% for Roma minorities (79% in 2020) and 73% (78% in 2020) for displaced persons or refugees.

Considering the economies individually, Albania is the most favourable to persons with disabilities, with nearly all those polled, 98% (6% up since 2020), supporting the idea of affording affirmative measures for their employment. It is followed by North Macedonia (92%, up from 91% in 2020), while those polled in Montenegro are the least favourable (84%, the same as in 2020). Albania is the most supportive economy of such affirmative measures for displaced persons or refugees as well (92%, up from 86% in 2020), having pushed Kosovo* to the second place (at 84%, a 13% less than in 2020), while North Macedonia (at 55%, a 3% drop since 2020) remains the least sportive of such measures for this category, 18% below the regional average.

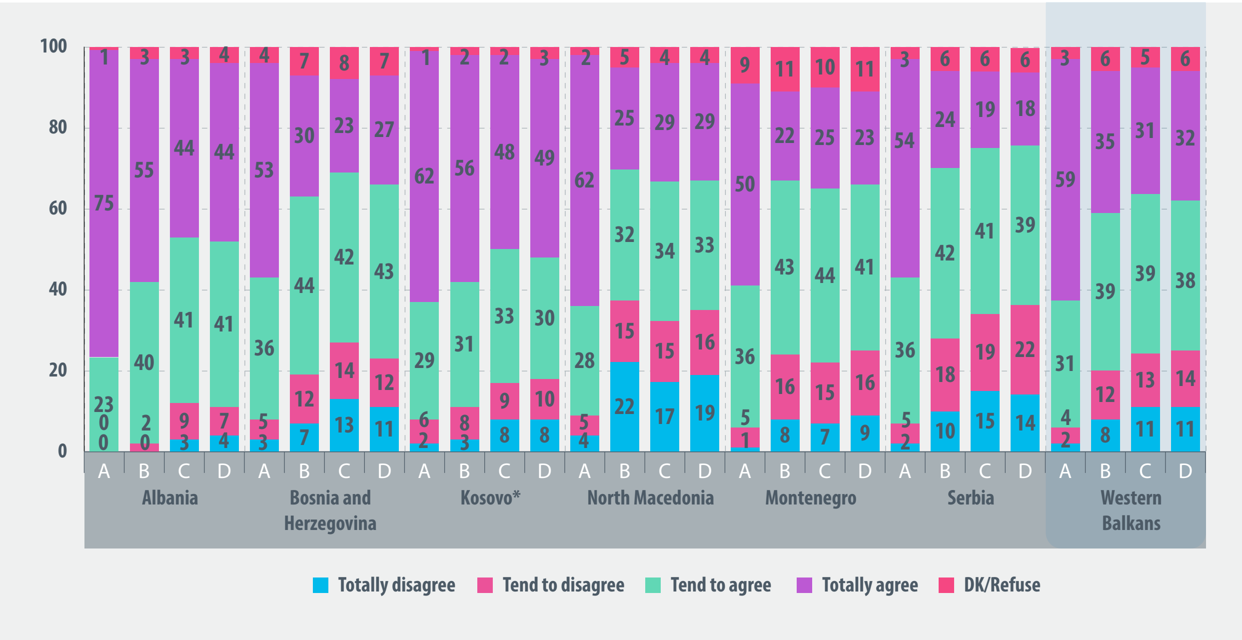
Notable trends compared to the previous round on affirmative measures for Roma minorities include switching of top positions between Albania and Kosovo* on the share of their respondents supportive of affirmative measures for employing members of Roma communities: 93% (a 3%

increase) in the former and 77% in the latter (a 16% decrease, the most significant in all economies on this category). Serbia, with 64% of respondents supporting such measures for members of the Roma community (6% less), is the least favourable of such measures towards them. The same pattern between Albania and Kosovo* can be noted on affirmative measures for other minorities: the former at 93% (5% up) and the latter at 77% (18-point decline). Serbia, with 64% (12% less than in 2020) has replaced North Macedonia as the least accepting of affirmative measures to support employment of other minorities in the public and private sectors.

Figure 73: To what extent do you agree with the following statement - The Government should do more in order to ensure better housing conditions for persons belonging to the groups listed below?

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

(All respondents, N=6029, scale from 1 to 4, share of total, %)



Looking at the regional level, the most notable trend since the previous round of the Barometer is that the average level of support among those polled for affirmative housing measures for all the four groups covered under this question has decreased, yet it remains very high (between 70% and 90%). While the level of support for Governments to provide affirmative housing measures for people with disabilities is the highest (at 90%, only 2% less than in 2020), support for such measures for other minorities has decreased the most (by 10% from 80% to 70%).

On the other hand, the most notable trend when looking at individual economies is that Albania is the champion of affirmative housing measures for all these four groups, with the level of support ranging between 85% and 98% of respondents: 98% for the disabled, 95% for displaced people and refuges, and 85% for Roma and other minorities. Affirmative housing for disabled people enjoys the lowest level of support in Montenegro (at 86%, the same as in 2020).

Affirmative housing measures for displaced persons or refugees enjoy the lowest level of support in North Macedonia (by 57% of respondents, 1% less than in the previous round). The least supportive of such affirmative measures for Roma communities are those polled in Serbia (60%, a 4-point decrease). Lastly, provision of affirmative housing measures to other minorities is the least preferred policy in Serbia (at 57%), a 14% decrease compared to the last Barometer.

Figure 74: How likely is that you are comfortable with (Results for the Western Balkan region):

(All respondents, N=6029, share of total, %)

There is little improvement from the previous round across the region away from persistent prejudice in perceptions towards the Roma communities. Prejudice among respondents is most remarkable towards marrying a Roma person, followed by sharing living environments, such as inviting them to one's house or renting housing to them. Nearly two-thirds (64%, 4% less than in 2020) feel uncomfortable with their children marrying a Roma person.

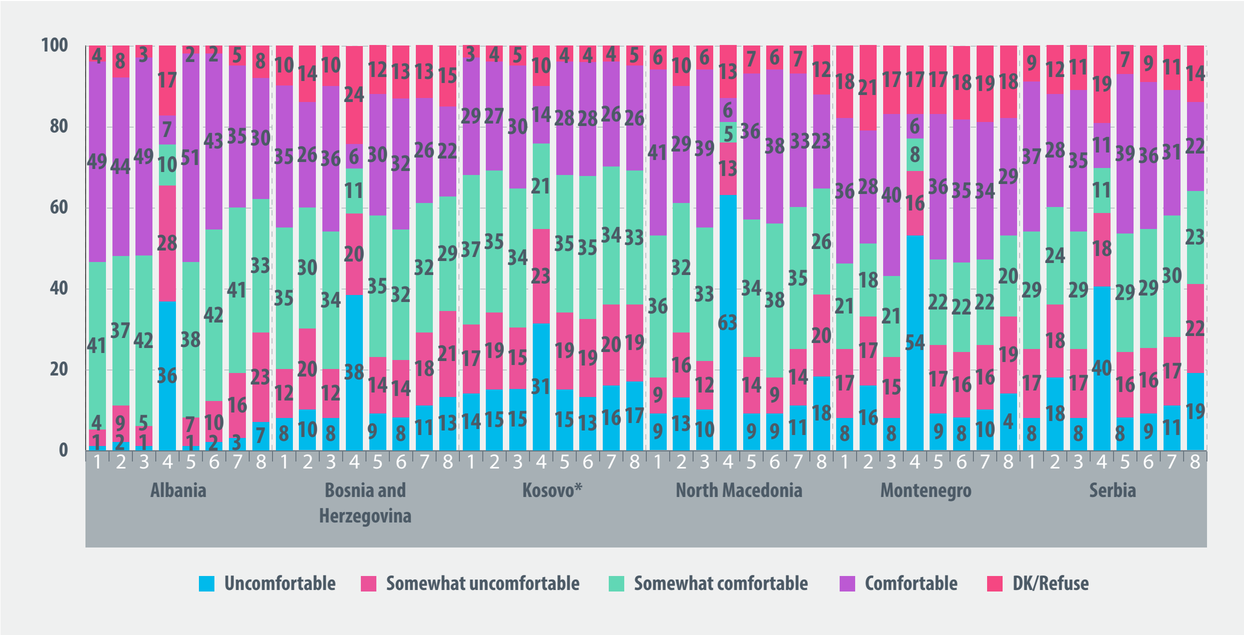
Next, over one-third (36%, 3% less than in 2020) reported feeling uncomfortable with the idea of renting housing to Roma, and only over half (52%), the same as in 2020, said they feel comfortable doing so. The perception of the idea of going to school with Roma children has improved slightly more, with 21% (5% less respondents than in the last round) feeling uncomfortable with it, as opposed to 70% (2% up) feeling comfortable with this idea.

Though respondents in the region have more favourable perceptions towards working with a Roma person and for a Roma employer relative to other interactions with them polled in the Barometer, there is virtually no improvement compared to the previous round. 71% (1% more than in 2020) feel comfortable working with a Roma person, while 59% (down from 61% in 2020) feel comfortable working for an employer from this community. All in all, persistence of prejudices among other communities towards Roma communities and the refusal to engage with them in daily lives, especially in critical spheres of socialisation such as at work or in schools, remain stumbling blocks to antidiscrimination policies and to their integration in the respective societies.

Figure 75: How likely is that you are comfortable with (Results by economies):

1. – working with Roma: 2. – working for Roma employer; 3. – your children go to school with Roma children; 4. – marry Roma/your children marry Roma; 5. – buy products from Roma/made by Roma; 6. - have friends who are Roma; 7. – invite Roma to your house; 8. – rent housing to Roma

(All respondents, N=6029, scale from 1 to 4, share of total, %)



When one looks at individual economies, survey results show little improvements in most economies in all indicators covered. In most economies, respondents have ranked them, from the most to the least acceptable form of interaction, as follows: their children going to school with Roma children, working with members of Roma communities, buying products from them, maintaining friendship with them, working for a Roma employer; inviting Roma to their houses, renting housing to Roma, and marrying Roma or their children marrying them.

Marrying a Roma person or their children marrying them remains the least acceptable form of interaction with them in all economies. It is most unacceptable in North Macedonia: 76% (5% more than in 2020) feel uncomfortable with it, as opposed to 11% (8% less than in 2020) feeling comfortable with this. It is least unacceptable in Kosovo* – 54% feel uncomfortable with it, as opposed to 35% feeling comfortable with it – a tremendous improvement since the previous round when 25% more respondents (80% of them) felt uncomfortable with this and 25% less (10%) felt comfortable with it. This indicator is also characterised by the highest share of those polled who refused to answer or said they did not know the answer: it ranges between 24% in Bosnia and Herzegovina and 10% in Kosovo*.

Roma are most acceptable as co-workers in Albania (by 90% of respondents) and least accepted in Montenegro (by 57% of those polled). Interestingly, both economies have seen the same margin of change of perception on this, in opposite directions: 17% increase in Albania, and 17% decrease in Montenegro. On the other hand, working for a Roma employer is a choice those surveyed in the region feel even less comfortable with than working with a member of these communities: 81% of them in Albania and only 46% of them in Montenegro. The latter has seen the most significant downward trend – a 15% decrease in the share of respondents who would feel comfortable working with a Roma employer, while in Albania the opposite trend is notable (a 12% increase). Montenegro also has the highest share (21%) of respondents who said they did not know the answer or refused to give one.

A higher degree of acceptability of Roma communities than working for a Roma employer is notable when it comes to their children going to school with children belonging to these communities. Such a degree is also higher compared to the previous round on the same indictor. 91% of them in Albania (a 19% hike from 72% in 2020) versus 61% in Montenegro (a 7-point decrease from 68% in 2020) would be comfortable with this.

Likewise, inviting a Roma person to their houses is slightly more acceptable to respondents in most economies than working for a Roma employer. It is most acceptable in North Macedonia (by 68% of those polled, 2% more than in 2020). It is least acceptable in Bosnia and Herzegovina and Montenegro (by 58% and 56%, respectively), having improved in the former, by 2%, and deteriorated in the latter, by 10%. On the last indicator, renting housing to Roma communities, Albania stands out as the most accepting economy, with 63%, 10% more than in the previous round, while Serbia (at 45%) stands at the other end of the spectre.

Buying products from Roma or made by them is acceptable almost at the same levels as working with them more or less in all economies. The highest level of acceptability of this form of interaction with them is in Albania (at 89%, an 18-point improvement since the last round), while less than six out of ten respondents in Montenegro would feel comfortable buying from them (an 8-point deterioration since the previous round).

In most economies, maintaining friendship with Roma is less preferred than buying products from them or made by them. Along similar trends as buying from them, Albania has seen the most significant improvement in this regard, by 12%, in the share of those polled who are comfortable with having a Roma friend (85% of them in this round, 73% in 2020). Montenegro, where the smallest share of the survey population favours having a Roma friend, has seen the opposite trend, namely an 18-point deterioration (57% in this round, 75% in 2020).

PERCEPTIONS OF TRADE

At regional level, the number of participants who are strong proponents of enhanced trading links between their economies and the other economies in the region subtracted to 51% (from 58% in 2020). Simultaneously, more people believe that their current trade links within the region are sufficient per se (31%, same as in 2020).

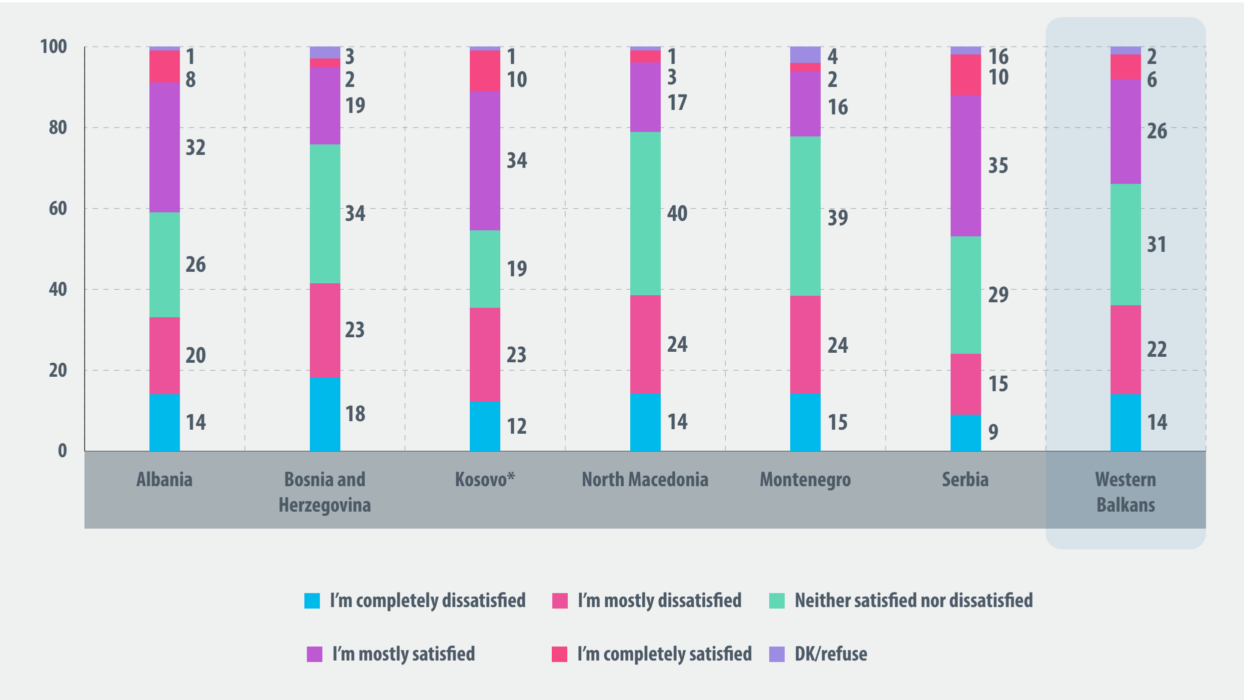
Albania (64%) is the region's biggest cheerleader when it comes to improving trade relations with the sister economies. Contrary to its neighbour, Kosovo* experienced the starkest drop in the number of those who support more trade links among the region's economies (38%, from 76% in 2020). The region remains firmly in favour of more free trade, as the number of participants who agree that the entry of foreign companies in the market will improve choice and decrease prices has remained at over two-thirds (68%). This despite a 3-point decrease in the share of sceptical ones among the surveyed population.

The region's preference to trade with the EU (69%) remains significantly higher to those who think that further improving trade and investment relations with the Eastern economies is a better idea. Turkey was chosen the most favourite trade partner by 41%, while enhancing trade links with China and Russia were proposed by 35% and 33% of respondents, respectively.

This cycle of Barometer reflects a predominant confidence of respondents when it comes to competitiveness of their domestic products and services compared to those of other economies in the region (85%) and of the EU (76%). While domestic products remain the top choice over the Western European and the regional ones, there is a consecutive decrease in the number of respondents who would choose their own products and not imported goods.

Figure 76: How would you describe commercial and trade links of your economy with the Western Balkans region?

(All respondents, N=6029, share of total, %)



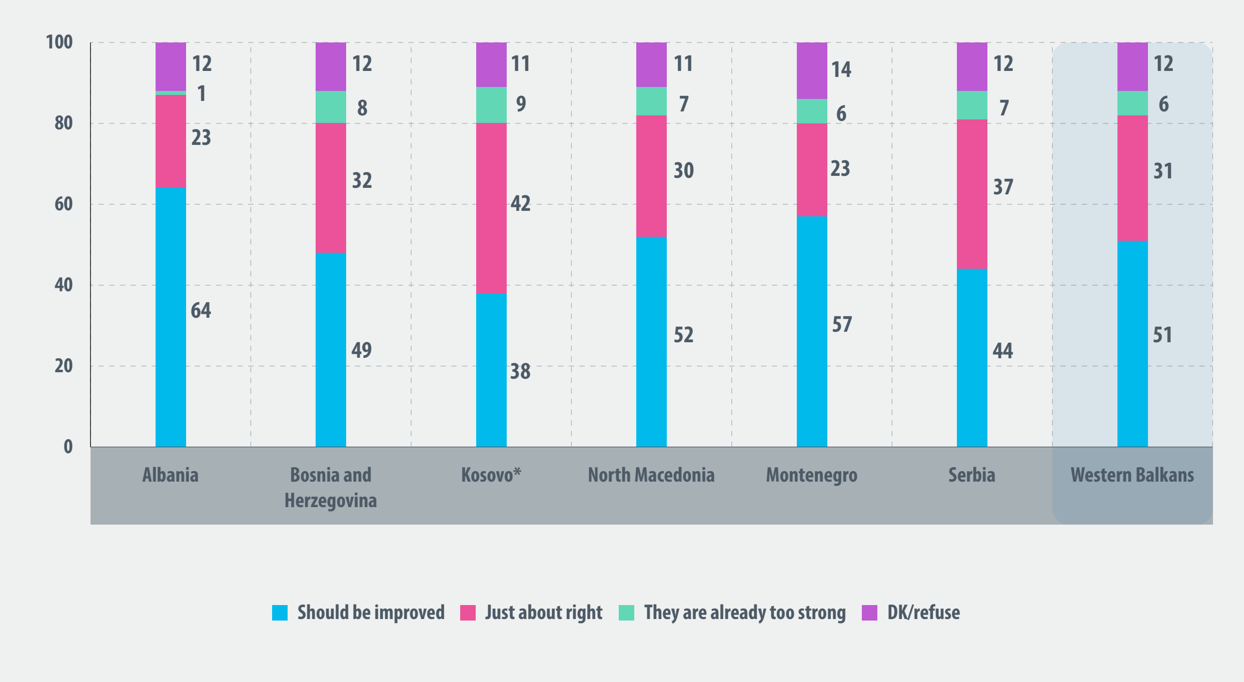
Overall, the share of Western Balkans' respondents who think that their economies should improve trade links with the rest of the region has declined, from almost one in six to a half (51%). Hand in hand with this, the number of those polled who think that such links are sufficient has seen an incremental increase for two consecutive rounds, this time by 5%, to nearly one-third (31%).

Albania has replaced Kosovo* to become the economy with the highest number of proponents of further improving trade exchange: almost two-thirds (64%) think it should be improved. For Albania this is an 11-point hike in the timespan of a year in favour of more trade within the region. This is in stark contrast to Kosovo*, which has seen the most dramatic drop in the number of those polled who are in favour of more trade – by half, from 76% in 2020 down to 38%.

This inevitably means a stronger perception in this economy that its trade links with neighbouring economies are either sufficient or too strong, a perception shared by a combined share of over half of the survey population (51%), a whopping 39-point hike since 2020. Such a dramatic shift of the public in Kosovo* turning sceptical to intra-regional trade needs deeper reflection throughout the region, including politically. On the other end of the scale, in Albania, only 24% of respondents in total are of the opinion that its trade ties with the rest of the region are already sufficient or too strong.

Figure 77: 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=6029, scale from 1 to 4, share of total, %)

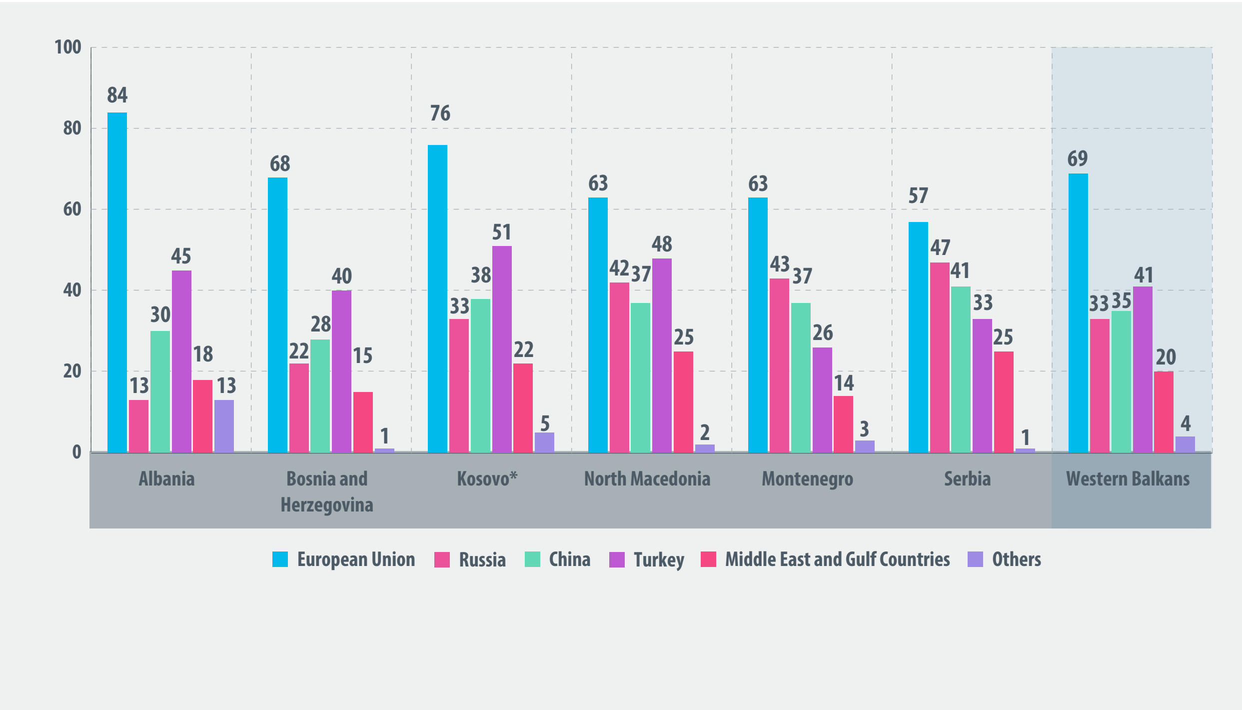


That the region remains firmly in favour of more free trade can be seen in the fact that the share of respondents who agree that the entry of foreign companies in the market will improve choice and decrease prices has remained at over two-thirds (68%). This despite a 3-point increase in the share of sceptical ones among the surveyed population (to 24%, from 21% in 2020).

Such optimism is shared by firm majorities of surveyed populations in all economies. Montenegro, where 77% of respondents answered affirmatively (4% more than in 2020) leads as the most optimistic economy in this regard. It replaced Albania as the most optimistic economy in favour of entry of foreign companies in the market in 2020, while Kosovo* (with 73% of respondents having answered positively) comes close second in this round of the Barometer. Notably, Kosovo* has made the most remarkable increase, by 14%, since 2020 in favour of foreign companies entering its market as a driver of more options and lower prices. This increase is somewhat puzzling given the dramatic turn of the public mood in this economy towards scepticism of more free trade within the region.

Figure 78: Which economies/regions do you think your government should further improve trade and investment relations with?

(All respondents, N=6029, multiple answers, share of total, %)



The EU maintains its primacy across the region as the most preferred block for citizens of all economies to further improve trade and investment relations with. 69% of respondents, only 4% less than in 2020, in total prefer it over other trading blocks. Turkey comes a distant second, favoured by 41%, albeit a 5-point increase since the 2020 round. China and Russia are a close third and fourth trade and investment partners, preferred by 35% and 33% of respondents, respectively, whereas Middle East and Gulf countries are only favoured by one in five of those polled. In other words, each of the five blocks enjoys roughly the same level of support among populations of the region as in the previous round as preferred blocks for improved trade and investment relations with.

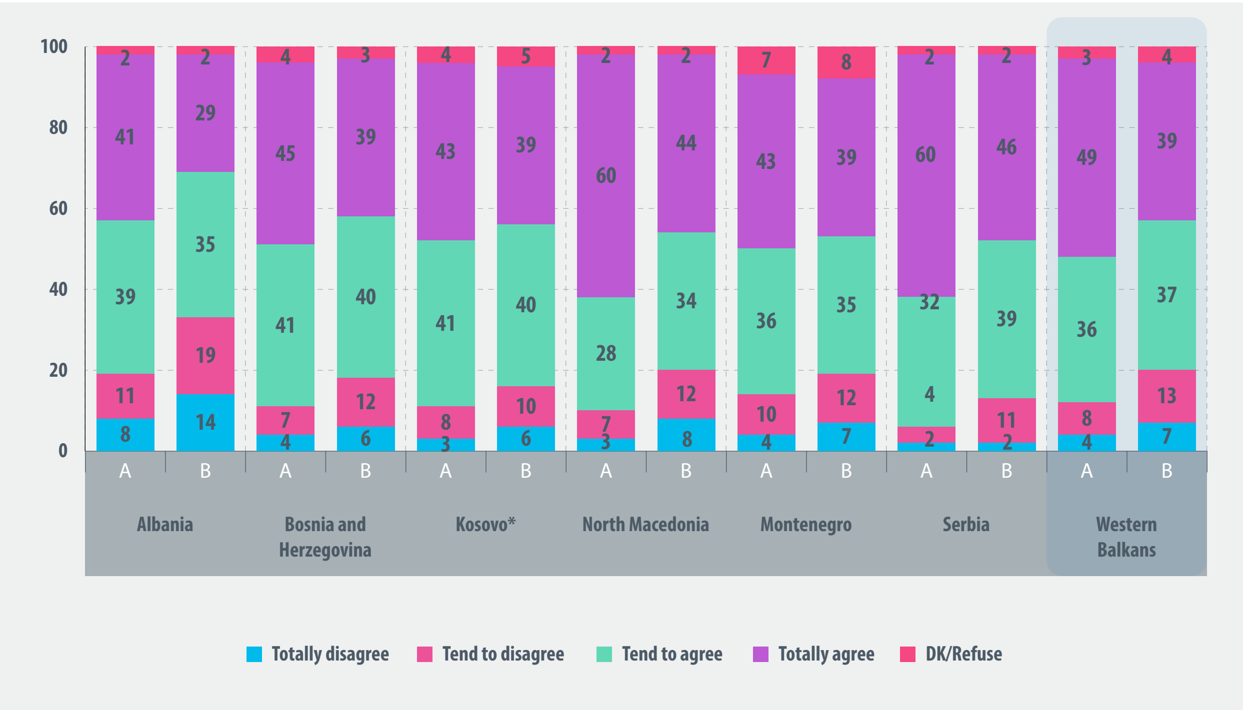
Within individual economies, Albania maintained its lead as the economy most enthusiastic to further engage in trade and investment relations with the EU, favoured by the vast majority of respondents (84%). It is followed, as a close second, by Kosovo* (at 76%, 3% less than in 2020), whereas Serbia (at 57%, a 1-point increase compared to 2020) is home to the lowest number of respondents preferring the EU over other blocks as a trade and investment partner. Kosovo* is also home to the highest number of those polled who favour furthering trade and investment exchange with Turkey (51%), having made the most dramatic hike, by 31% (from 20% in the last round). It is followed by North Macedonia (48%) and Albania (45%). China, favoured by 28% to 41% of respondents in individual economies, is the third most preferred trading block, while Russia is the second most preferred trading block in Serbia (at 47%) and preferred by sizable surveyed populations in Montenegro (43%) and North Macedonia (42%).

Figure 79: Do you agree with the following statements?

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

B – Goods and services of my economy can compete well with products and goods from the EU

(All respondents, N=6029, scale from 1 to 4, share of total, %)

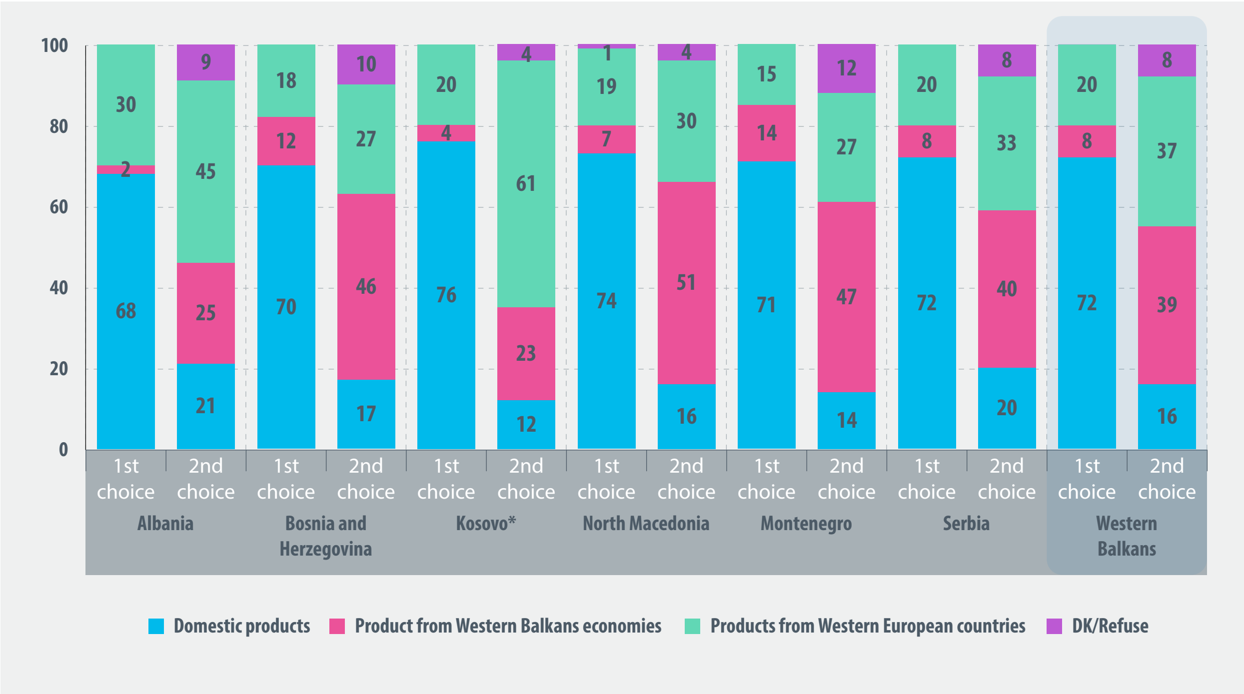


In this round of the Barometer, the region maintained its incremental upward trend, adding 2% to the vast majority of respondents sharing the opinion that their domestic goods and services are competitive enough with those of other economies in the region (85%) and of the EU (76%).

Looking at individual economies, Serbia kept its lead in the share of those polled who believe that products and services of this economy are competitive in the rest of the region (at 92%, the same as in 2020) and with the EU market (85%, 84% in 2020). Albania is the least confident of its products and services being competitive in the EU – 64% of its respondents think so, a significant 10% drop – and with those of other economies in the region – with 80% of its respondents, 4% less compared to the previous round.

Figure 80: If you could choose a food or beverage product from three different sources: domestic product, product from the Western Balkans region and product from Western European countries, which one would be your first choice, and which would be second?

(All respondents, N=6029, single answer, share of total, %)



Overall, one can note a continued, yet incremental, downward trend in favour of domestic products over imported ones while maintaining the same order of preference for markets as in the previous edition: domestic, Western European, and regional.

A regional average of 72% of respondents (78% in 2020) said domestic food and beverages are their first choice when buying, while 20% (7% more than in 2020) would opt for such products imported from Western European markets as their first choice. Only 8% opted for those coming from other economies of the region. Furthermore, the share of respondents who find food and beverage from neighbouring economies as second choice options is slightly higher than of those considering Western European ones as such (39% versus 37%). Only a mean 16% consider domestically produced food and beverage as second choice when buying.

Within individual economies, Kosovo* has by a small margin the largest share of respondents favouring domestic products over those from other regional markets and Western European ones (76%, a 6-point decrease). It has pushed Serbia to the second position on this, where 72% favour domestic products over the other two categories as their first choice, a steep decline by 16% since 2020). In addition, 23% more of those polled in Kosovo* (61%, 38% in 2020) ranked Western European food and beverages as second choice ones. Following exactly the same trend in reverse order, 23% less respondents (23%, 46% in 2020) consider such products coming from other economies in the region as second choice ones, and only 12% (6% in 2020) consider domestic ones so.

At 61%, Kosovo* is also home to the largest share of respondents for whom Western European products are second choice ones, a position occupied by Albania in the 2020 Barometer (at 45%). On the other end of the scale, Bosnia and Herzegovina and Montenegro have the smallest share of respondents belonging to this category (27%), a position occupied only by Montenegro in the previous edition (at the same share of survey population, 27%). At 51%, North Macedonia has the largest share of those polled who consider products coming from other regional economies second choice ones, a position also occupied by Montenegro in the previous edition (while this year it is at 47% behind North Macedonia). On the other end of the scale, Kosovo* has the smallest share of respondents belonging to this category (23%). At 12%, Kosovo* remains home to the smallest share of respondents who consider domestic products second choice ones (6% in 2020).

On the other hand, it is also notable that Albania remains home to the largest share of respondents who consider domestic products second choice ones (21%, 19% in 2020). Albania also has the highest share of respondents who consider Western European food and beverage as their first choice: 30% of respondents in this economy have stated so. This makes this economy the only one with above the regional average preference for Western European products, while Serbia and Kosovo* are at the same level as the regional average (20%) and all other economies below it.

PERCEPTIONS OF TRANSPORT AND INFRASTRUCTURE

The importance of transport and infrastructure for the region is shown by the fact that it is a priority area also within the EU integration framework, especially since the Berlin Process and the 2020 Green Agenda for the Western Balkans and EU's Economic and Investment Plan (EIP) for the Western Balkans. EIP will mobilise up to EUR 9 billion in grants for investment flagships in areas of transport, energy, and green and digital transition, aiming to create sustainable growth and jobs, with special focus on sustainable and green transport. In the EIP, the EU has come up with flagships on transport and infrastructure. In addition, the Transport Community Organisation has developed a Sustainable and Smart Mobility Strategy for the Western Balkans. Modelled upon the EU's Sustainable and Smart Mobility Strategy, it seeks to reform the sector along three objectives, namely, to make it sustainable, smart and resilient.[12]

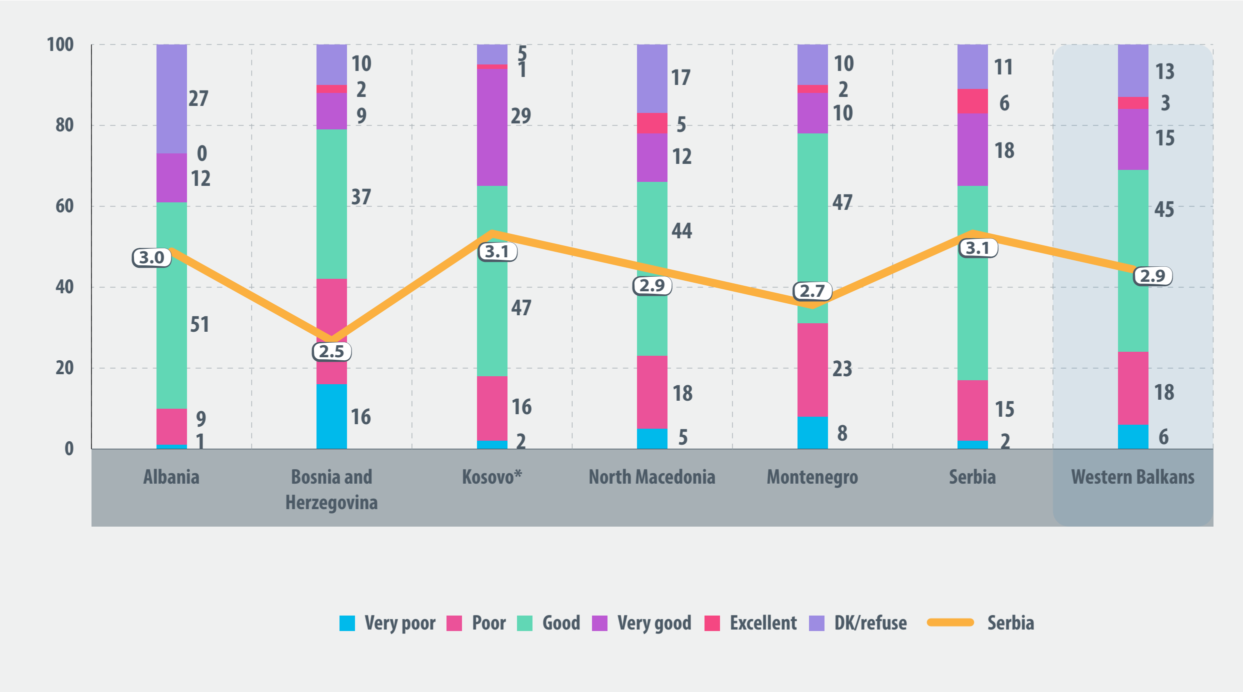
In the meantime, individual economies of the region have been working with the EU in delivering EIP through IPA III and other instruments. Complementary to this, they have also been contributing additional efforts and investments in this area in the framework of European integration and economic convergence among themselves and with the EU internal market. In this context, citizens' perceptions are among the most important indicators to assessing the impact of reforms and investments on the ground.

This round of the Barometer only focuses on the quality of transport infrastructure and connections within the region. Results of the survey indicate that satisfaction of citizens of the region has not increased since the previous round: on average nearly two-thirds are satisfied with their quality and about a quarter are dissatisfied. On the other hand, while Kosovo* remains the economy with the biggest number of satisfied respondents, more than three-quarters (77%), Bosnia and Herzegovina recorded a trivial improvement in transport infrastructure, remaining the region's most dissatisfied economy (48%).

12 Transport Community Treaty Organisation, *Gap Analysis – Strategy for Sustainable and Smart Mobility in the Western Balkans*, pp. 6, 13, https://www.transport-community.org/wp-content/uploads/2020/07/GAP-Analysis-STRATEGY-FOR-SUSTAINABLE-AND-SMART-MOBILITY-IN-THE-WESTERN-BALKANS.pdf.

Figure 81: How do you estimate the quality of transport infrastructure and connections within the Western Balkan region?

(All respondents, N=6029, single answer, scale from 1 to 5, share of total, %)



Western Balkans' citizens are as satisfied as in the 2020 round with the quality of transport infrastructure and connections within the region. Almost two-thirds (63%), roughly the same as in 2020, find them either good, very good or excellent, as opposed to only 24% (only 2% less than a year ago) finding them either poor or very poor.

Kosovo* remains the leading economy in terms of citizens' satisfaction with transport infrastructure and connections within the region, with 77% of them (8% less than in 2020) finding them as either good, very good or excellent, as opposed to 18% of them (5% more than in 2020) finding them poor or very poor. On the other hand, Bosnia and Herzegovina – with nearly half of those polled (48%, 49% in 2020) having expressed satisfaction and around four out of ten (42%, 44% in 2020) having expressed dissatisfaction – remains the economy with the lowest level of happiness of its population with regional transport infrastructure and connections.

ATTITUDES TOWARDS CLIMATE CHANGE AND ENERGY

On a similar situation and sharing the same extent of needs for protection of the environment, including through cleaner energy and transport, as well as for protection from effects of climate change, the level of climate awareness across the Western Balkan region remains more or less as high as a year ago. More than two-thirds (67%), on average, consider climate change a problem, contrary to the other group of nearly a third (31%) of those polled who do not see it as a pressing concern. In some economies, such as North Macedonia and Albania, it is an even more widespread concern, exceeding three-quarters of survey populations, whereas Kosovo* recorded the highest increment of participants in this group (from 14% in 2020 to 41% in 2022).

Moreover, the average share of respondents in the region who see pollution as a problem to their places of living is at two-thirds (66%), a downward trend from 73% in 2020. The share of those who do not see it as a problem has decreased by the same percentage. In some economies it has reached three-quarters: North Macedonia has outrun Kosovo* as the most concerned one (76%), while interestingly enough, the latter shows changes in perception by wide margins, from the biggest worrier about pollution to the least concerned: only over half of its respondents consider it a problem, as opposed to over four in ten (43%) not considering it a problem.

The third finding showing the urgency of environmental protection and of tackling climate change is that reaching climate neutrality in the Western Balkans by 2050 is being perceived increasingly more difficult compared to the previous round. On average, a mean half of respondents of the region share the belief that achieving climate neutrality in about 30 years' time is either difficult or impossible, while only one-fifth find it possible. Half the share of sceptical ones, or one in ten, do not even consider it a priority at all, while less than two in ten consider it necessary.

That this level of scepticism is based on citizens' awareness of a dire state of environment across the region is also confirmed by results of this Barometer on their readiness to pay for a cleaner environment. As in the previous round, a clear majority of six in ten respondents, on average, are willing to buy environmentally friendly products even if they cost more. Finally, along the same sceptical lines, a vast majority of citizens are unprepared to cope with the ambitious agenda of decarbonisation, as shown by the findings on the question of this round on circular economy, a key component of this long-term multidimensional reform. Specifically, while citizens were familiar with the negative effects of the carbon dioxide in the everyday life, an average of more than three-quarters of survey participants are unaware of what elements circular economy consists of, reaching as high as 95% in some economies.

Figure 82: Is climate change a problem?

(All respondents, N=6029, scale from 1 to 4, share of total, %)

Albeit a 7% decline compared to the previous round, most citizens in the Western Balkans, on average, are of the opinion that climate change is a problem: 67% of respondents think so, as opposed to 31% who do not find it to be a problem.

The same level of concern in reflected in individual economies, with North Macedonia and Albania leading as the most concerned ones – with over three-fourth (or 76%) of respondents in both having expressed concern over it. Kosovo*, on the other hand, is the least concerned: only 41% of those polled in this economy expressed concern, as opposed to 56% of them having stated not to be concerned. This economy is notable for the most remarkable improvement in its respondents' perception of climate change as a problem: a 42% increase in the number of those not seeing it as a problem (from 14%) and a 39% decrease (from 80% in 2020) in the share of those seeing it so.

Figure 83: Do you consider pollution to be a problem in your place of living?

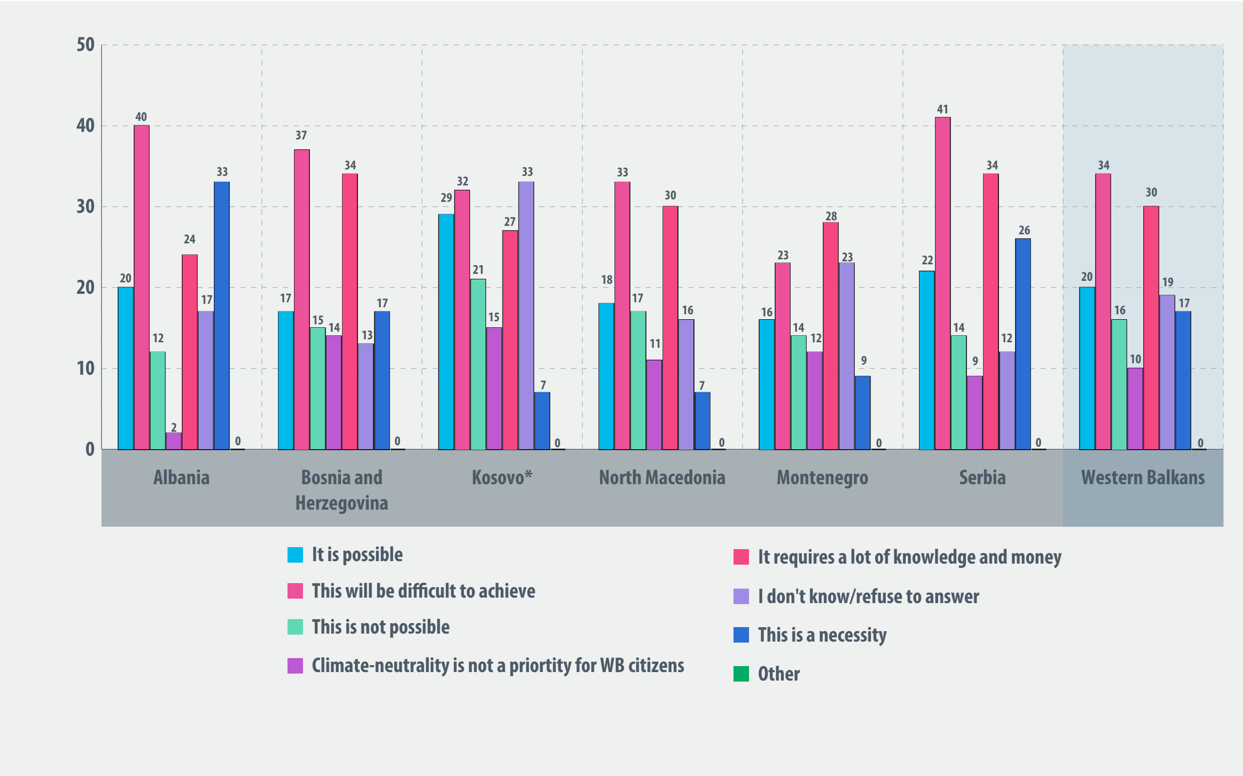
(All respondents, N=6029, scale from 1 to 4, share of total, %)

As a whole, citizens in the Western Balkans see pollution as less of a problem to their place of living than a year ago: 66% of them (a 7% decrease from 73% in 2020) see it as a problem, while 32% (7% up from 25% in 2020) do not see it as a problem.

Within individual economies, North Macedonia has replaced Kosovo* as the economy that is home to the highest share of citizens (76%, 2% less in 2020) concerned with pollution as a problem to the places of their living, as opposed to 23% (1% more than in 2020) of them not considering it a problem. Kosovo*, on the other hand, turns out to be the least concerned by pollution as an environmental problem: only over half (53%) of its respondents consider it such a problem, while 43% of them do not consider it so. As in a number of other instances, Kosovo* is notable for the most remarkable positive shift in terms of viewing pollution as a potential environmental problem: a 34-point increase in the share of those who do not see it as a problem (from 9% in 2020) and a 33-point decline in the share of those seeing it as a problem (from 86% in 2020).

Figure 84: Do you think that reducing CO2 emissions and bringing them to the level close to zero which will allow achieving climate-neutrality in the WB by 2050 is feasible?

(All respondents, N=6029, multiple answers, %)



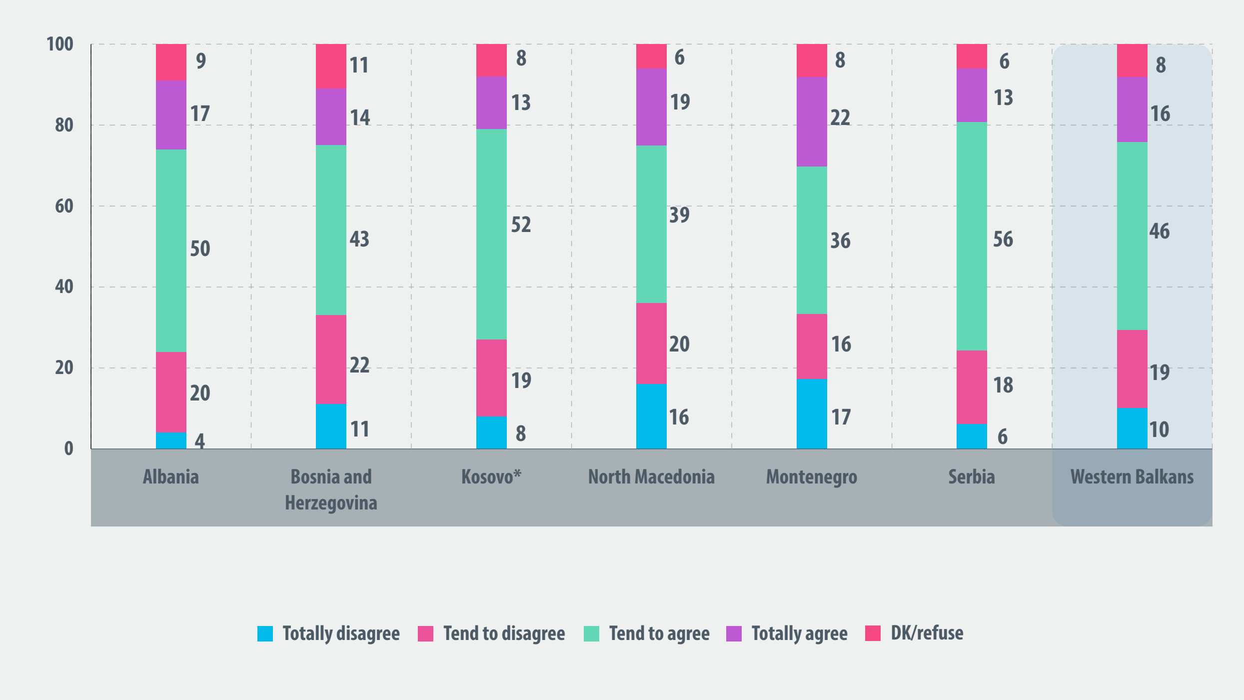
The level of scepticism among citizens vis-à-vis reaching climate neutrality in the Western Balkans by 2050 has increased compared to the previous round. A regional average of half of respondents (50%, 2% more than in 2020) believe that it is either difficult or impossible to achieve, while only 20% (down from 25% in 2020) believe it is possible. The share of survey participants who think achieving climate neutrality is necessary has also decreased by 5%, now standing at 17%, while one in ten (2% up) do not consider it a priority for region's citizens.

A general trend in all economies is dominance of climate neutrality sceptics and a significant increase in the level of pessimism towards achieving climate neutrality, in some economies even by more than 30% compared to 2020. Serbia remains the most sceptical: 55% (2% more than in 2020) of respondents think that it is either impossible or difficult to achieve, followed by Kosovo*, where 53% of those polled are of this opinion. The latter is also notable as the economy with the highest hike, 33%, in the share of those who find achieving climate neutrality either difficult or impossible, while Montenegro stands out as the only economy where scepticism has decreased compared to the previous round, by 11% (from 48% to 37%).

On the other hand, Kosovo*, albeit 3-point drop, remains the most optimistic economy on this: 29% of its respondents find it possible to achieve, while in Montenegro only 16% are optimistic. On the positive side, citizens in Albania seem to prioritise climate neutrality the most: only 2% of its respondents think that it is not a priority – as opposed to Kosovo*, which has the highest share of respondents who find climate neutrality not to be a priority (15%). Both economies have seen significant fluctuations in the number of respondents sharing this opinion from the previous round: 8% decline in Albania and a 14-point hike in Kosovo*.

Figure 85: Do you agree with the following statement: I'm ready to buy environmentally friendly products even if they cost a little bit more?

(All respondents, N=6029, scale from 1 to 4, share of total, %)



Along similar trends as in the previous round of the Barometer and despite growing living costs caused by consequences of the pandemic, the region enjoys the same level of readiness among its populations to pay for the environment. On average, a clear majority, 62% of respondents (the same as in the last round) are willing to buy environmentally friendly products even if they cost more. 29%, only 3% more than in 2020, are not ready to do so.

Within individual economies, Serbia has surpassed Montenegro to become the economy that is home to the highest share of environmentally friendly shoppers: nearly seven out of ten (69%) stated that they would spend more for environmentally friendly products even if they cost more. Bosnia and Herzegovina, at 57%, is home to the least environmentally friendly shoppers, while Kosovo* has seen the most dramatic hike, by 18%, on the share of its surveyed population ready to buy environmentally friendly products even at a higher cost (from 47% in 2020 to 65% in this round). On the other hand, North Macedonia remains the region's economy with the biggest share of respondents not willing to buy environmentally friendly products even at a higher cost (36%, up from 30% in 2020).

Figure 86: Please list a few elements that best describe the term "Circular Economy"?

(All respondents, n=6029, multiple answers, %)

Circular economy is one of the pillars of the long-term agenda of decarbonisation in the Western Balkans that is being pursued jointly with the EU, with a view to contributing to achieve climate neutrality by 2050. The concept of circular economy is centred on extracting new resources by reusing products instead of scrapping and throwing them away.

Being a new entry to the Barometer, this round's survey results show that the vast majority of those polled in all economies are unaware of this new concept and practice that is one of the pillars of decarbonisation. At the regional level, a mean 77% of respondents said they do not know what elements circular economy consist of, while 10% defined it as encompassing recycling of products/waste/plastic. In individual economies, the level of unawareness oscillates between 66% (in Serbia) and 95% (in Kosovo*). Furthermore, 16% of those polled in the former and only 2% in the latter mentioned recycling of products/waste/plastic as elements of circular economy.

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

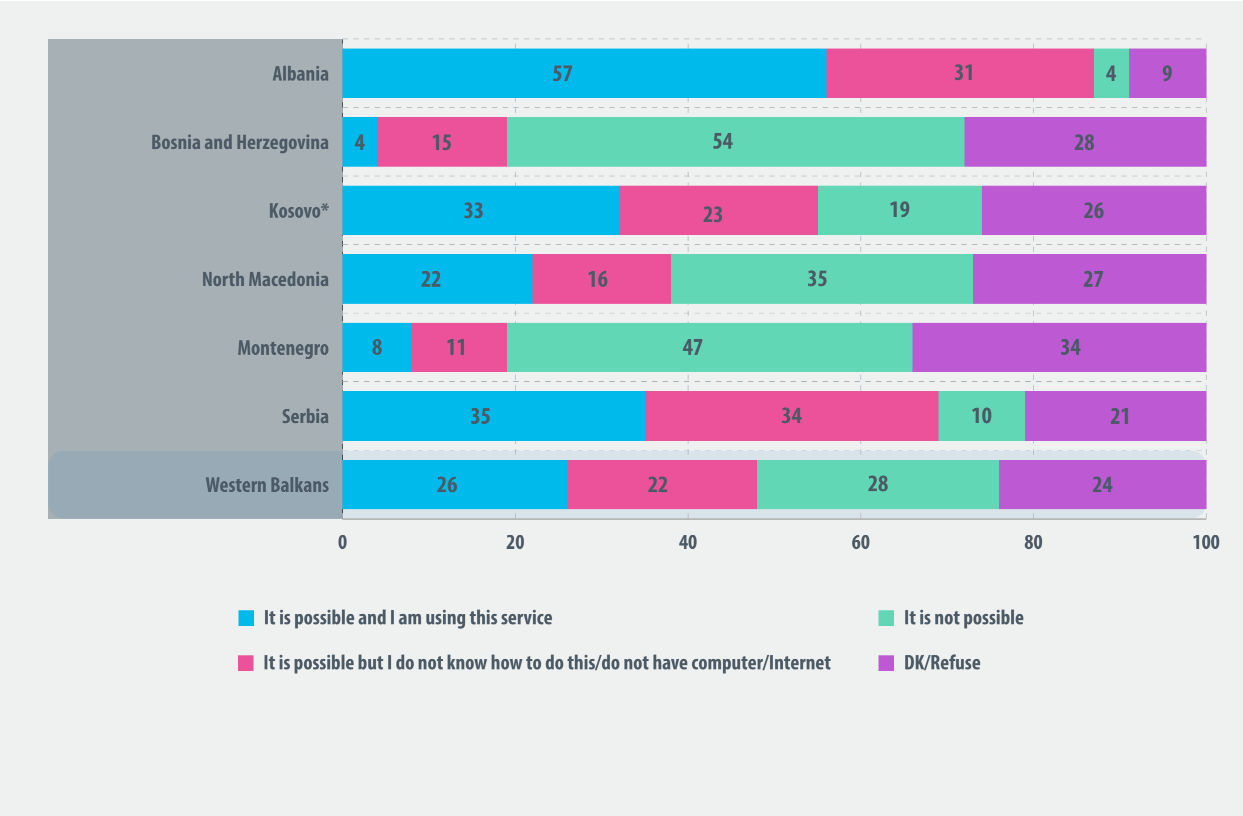
There is a positive trend compared to the previous round of the Barometer on using online public services to acquire personal documents. While between a quarter and a third (28%) of respondents thought it was impossible to do so, 26% were using such online services. On the other hand, slightly more than one-fifth (22%) of those surveyed said they were aware of the provision of such services but do not know how to use them. Moreover, COVID-19 has shifted to a certain extent the operation of our daily lives. 39% of the region switched to online services during the pandemic, while 61% still used the traditional mechanisms. Kosovo* (60%) is home to the highest number of respondents who switched online, while citizens in Montenegro were more hesitant to get out of the box, with only 25% using online services.

When it comes to rule of law, unfortunately there is an increasingly widening gap between participants who do not trust the law (62%) versus those who see law as a reliable and equally applied means (35%). When it comes to equal application of law specifically, public perception has deteriorated compared to previous rounds. Regionally speaking, a large majority of about seven out of ten (69%) citizens do not trust that law is being equally applied in their economies, while three out of ten think that it is applied equally. Albania leads the negative contingent, with 82% feeling distrust on equal application of the law.

When it comes to trust in public institutions, however, the credibility of central governments in the eyes of their citizens has increased rather incrementally, reaching 40% in this round. Moreover, at the regional level, Ombudsperson institutions are the most trusted institutions (44%). On the other hand, there is a lot of room for improvement for political parties, as only one-fifth of respondents found them trustworthy (21%, from 24% in 2020).

Figure 87: Is it possible to get your personal documents (birth certificate, citizenship, etc.) or any other personal document online?

(All respondents, N=6029, share of total, %)

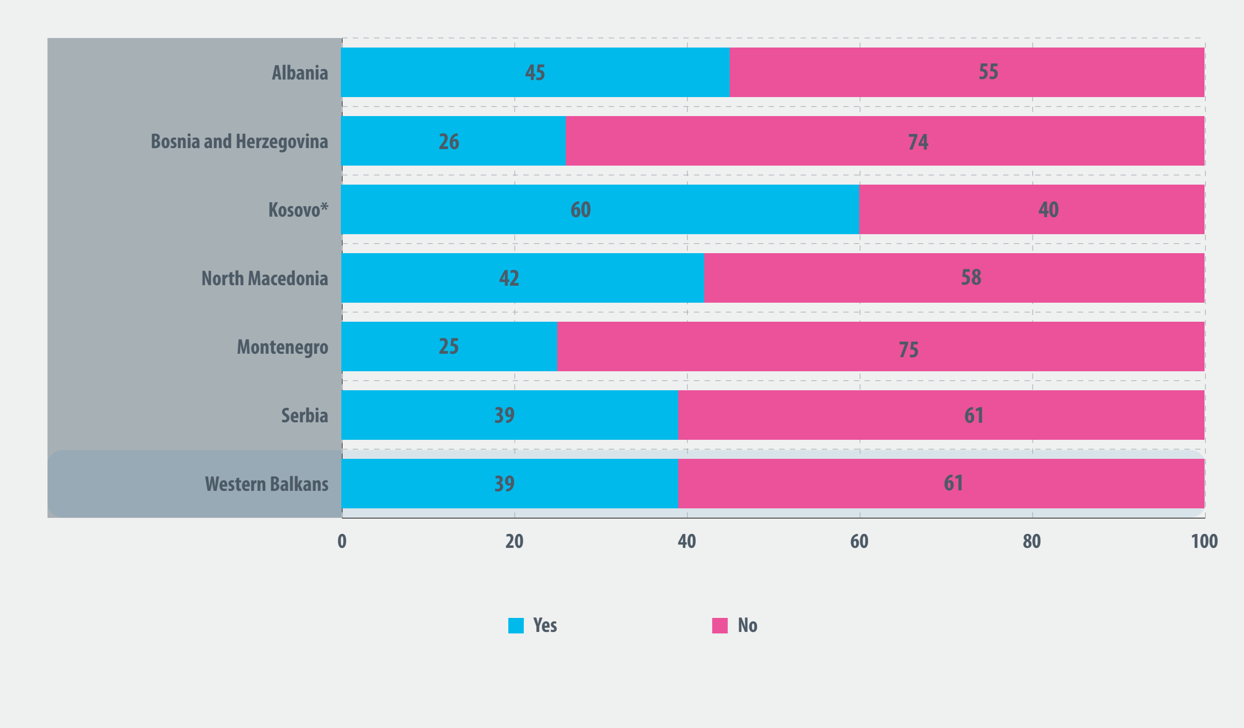


There are no significant improvements in the region since the previous round of the Barometer on the use of online-based public services to get personal documents. At the regional level, although a mean small majority of nearly one in three respondents (28%) think it is not possible to do so, the share of those aware of them and using them has only dropped by 1 percentage point, standing at just over a quarter of respondents. The share of those aware of the possibility but not aware of how to do it, and of those who said they did not know how to answer or refused to do so, is still quite high, at 22% and 24, respectively.

Within individual economies, Albania retained the lead as home to the highest number of respondents who are aware of availability of such services and using them (57%), followed by Serbia, which recorded the highest increase of the share of respondents falling in this category (from 25% in 2020 to 35% in this round). Bosnia and Herzegovina lies on the other end of the scale, where the downward trend continued, shrinking to 4%. Over half of the survey population in this economy (54%) think that obtaining personal documents online is not possible, followed by Montenegro (at 47%), while in Albania only 4% are of this opinion. Notably, Montenegro recorded the most significant decline from the previous round, by 9%.

Figure 88: Did you switch to online/digital services during the pandemic?

(All respondents, N=6029, share of total, %)

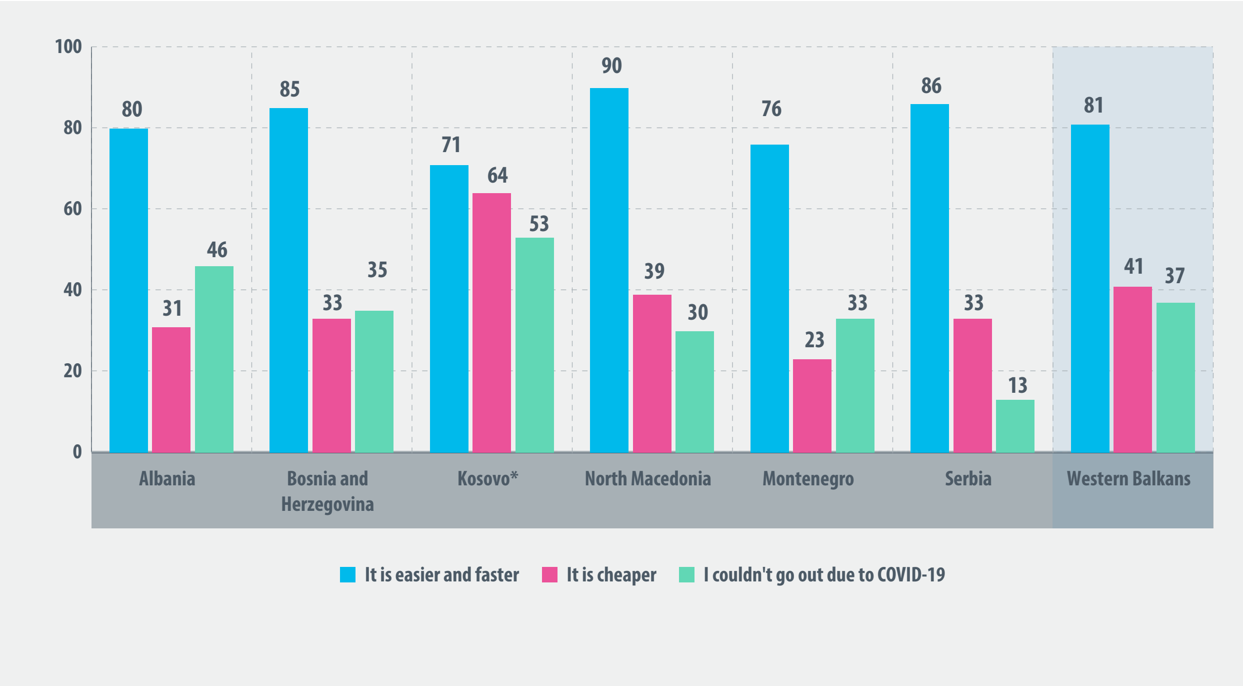


The average share of respondents who said they switched to online/digital services during the pandemic overall in the region grew by only 1% compared to 2020, whereas the majority, six out of ten did not.

Within individual economies, Kosovo*, home to the highest share of those polled who switched online, shows the opposite picture, with 60% having done so. This economy has pushed Albania to the second place, where this percentage declined significantly, by 16%. While Montenegro recorded the biggest decline of all economies, by 19%, the opposite trend is notable in Kosovo*, namely the biggest increase, by 11%.

Figure 89: Why yes?

(Those who switched to online/digital services during pandemic, n=2331, multiple answers, %)

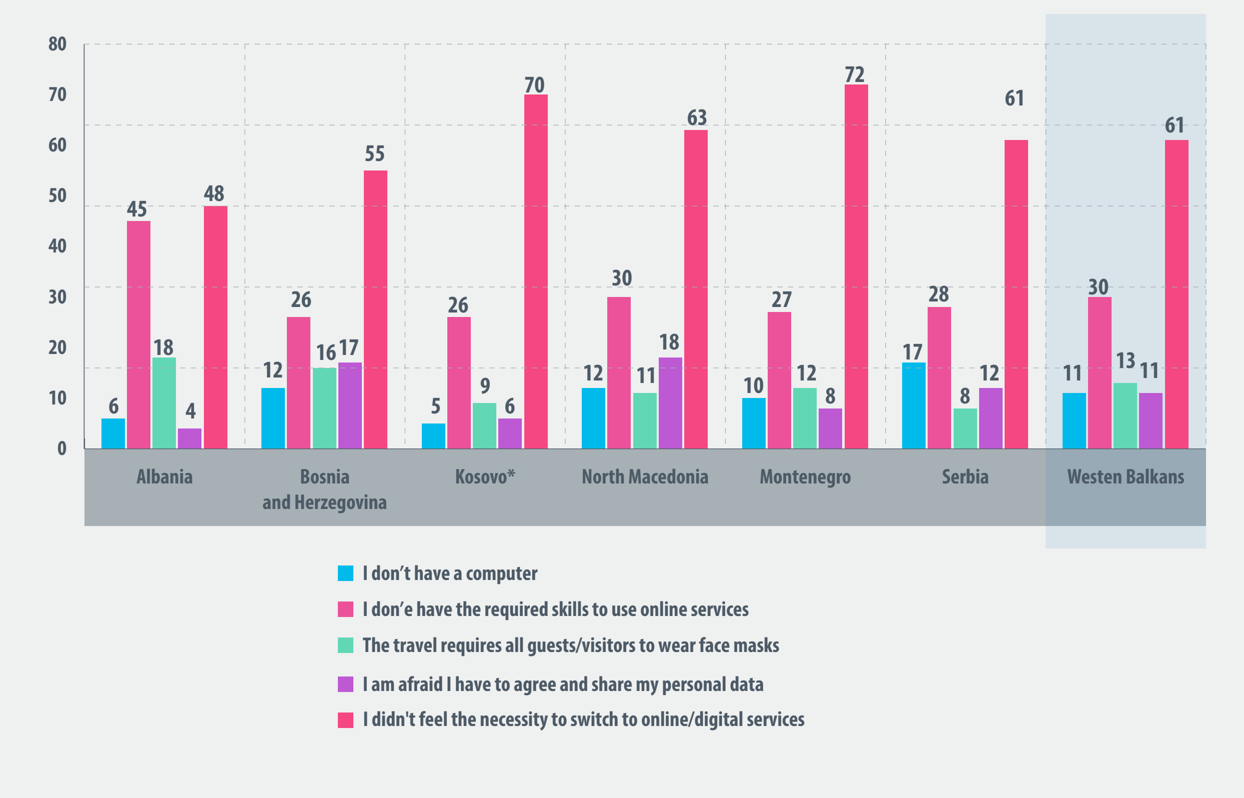


When it comes to the reasons why citizens in the Western Balkans did switch to online/digital services during the pandemic, a notable overall trend in the region among those who switched online is a very significant increase not linked to the pandemic but to the very advantages of online switch. While the share of respondents who made this switch because it is easier and faster is over eight out of ten, the most significant increase – by 23%, from 18% to 41% – is in the share of those who have done so because it is cheaper. The share of those who switched online, more than one-third – because of pandemic restrictions is still quite high.

Of the individual economies, North Macedonia had a slight increase from the previous round, reaching 90% of online/digital switch on grounds of easiness and fastness, while in Kosovo* over seven out of ten (71%) have done so for the same reason. Kosovo*, otherwise, has the highest share in the region of those polled who switched online because it is cheaper (64%, 4% up since 2020). Montenegro, on the other hand, remains with the lowest share in this category (at 23%) albeit a 7-point increase. Kosovo* also has the highest share of those who have switched online because of pandemic restrictions (53%, the same as last year), as opposed to Serbia where this share more than halved (13%, from 28%).

Figure 90: Why not?

(Those who did not switch to online/digital services during pandemic, n=3698, multiple answers, %)

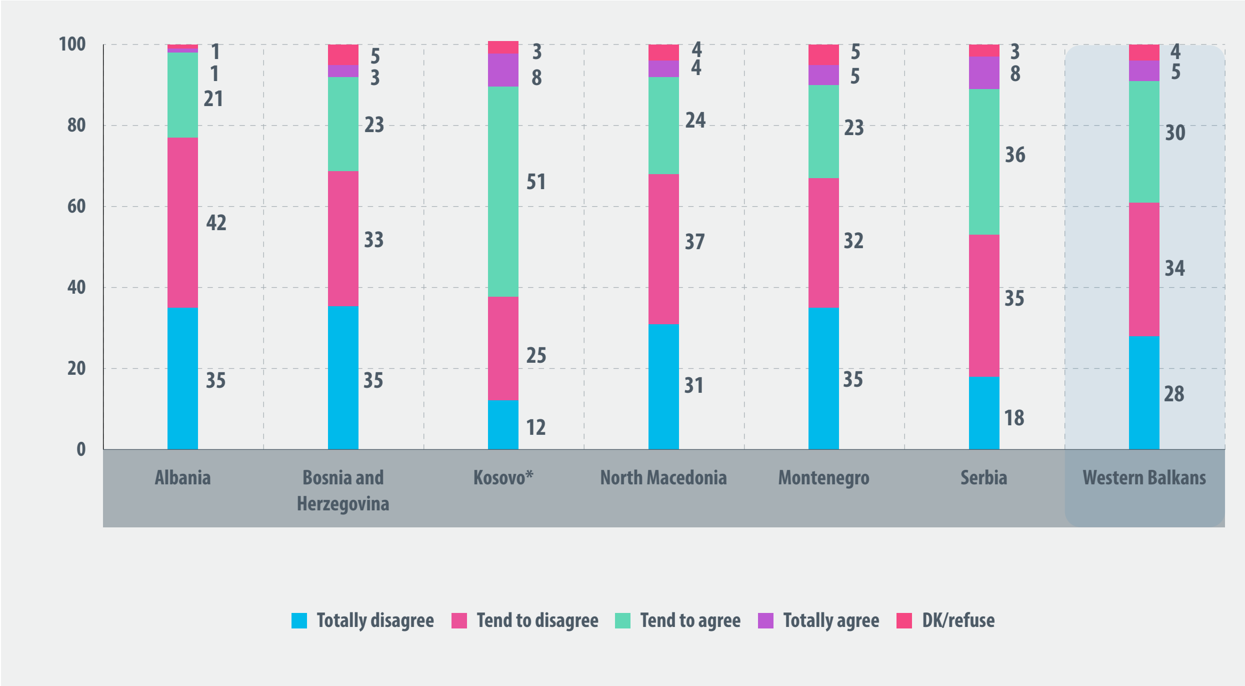


Of those who did not switch to online/digital services, the share of those who did not do so because they did not find it necessary increased slightly, from 55% last year to 61% in this round, while almost one-third said they did not do so because of lack of skills, an increase by the same proportion (6%).

Within individual economies, Montenegro took over from Kosovo* with the greatest number of respondents who did not feel necessity to switch online (72%, a 19-point increase). Albania has the biggest proportion among non-switchers who have chosen not to switch because of lack of skills (45%), significantly above the regional average. It also has the highest share of those who claimed to be uninformed on what services are provided online (18%), yet significantly lower than last year's share (24% in North Macedonia). North Macedonia, otherwise, at the same level (18%), maintained the position of the leading economy by the percentage of non-switchers who have not done so because they are worried about sharing personal data (20% in 2020). Bosnia and Herzegovina and Kosovo* are found on the other end of the scale on this (26% each), with the latter having made the biggest hike since the last round (by 20%, from just 5%).

Figure 91: Do you agree that, in your economy, the law is applied and enforced effectively?

(All respondents, N=6029, scale from 1 to 4, share of total, %)

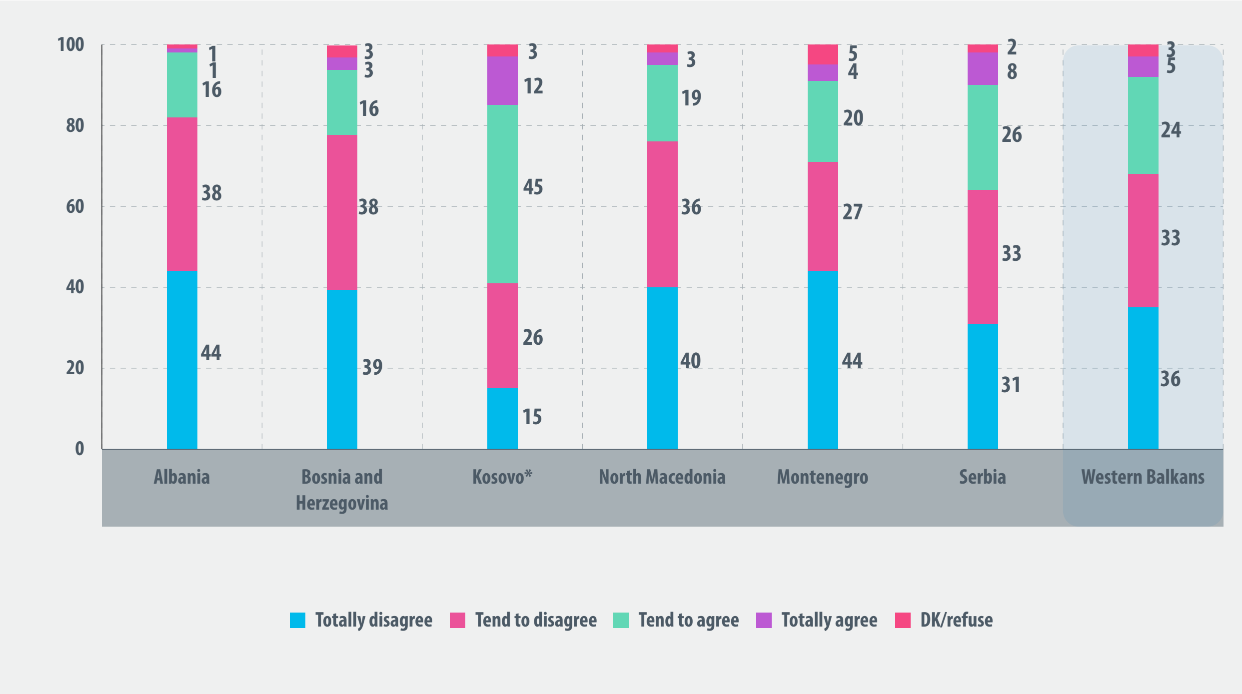


A worrying trend in the Western Balkans in this round of the Barometer is further widening of the gulf between those polled who do not trust that the law in their economy is applied and enforced effectively and those who do (27%). In other words, the proportion of the former (62%) is almost higher by half than of the latter (35%).

This year, Albania has become the most distrustful of effective application and enforcement of law, with 77% disagreeing that the law in their economy is being applied and enforced effectively and only 22% agreeing, a huge (55%) gap. The most optimistic economy on this is Kosovo*, where the perception virtually reversed compared to the previous round: nearly six in ten (59%) now believe that the law is being applied and enforced effectively and 37% do not believe so.

Figure 92: Do you agree that, in your economy, the law is applied to everyone equally?

(All respondents, N=6029, scale from 1 to 4, share of total, %)



On equal application of law, a further worsening trend compared to both the previous round and effective application and enforcement of the law is clear in the Western Balkans. Overall, virtually seven out of ten respondents (69%) are distrustful of equal application of the law in their economies and only less than one-third (29%) agree that it is being applied equally.

Again, Albania is the leading economy on the negative side, with 82% of respondents distrustful of equal application of the law there and only 17% trustful of it; thus further widening the gap between the two, from 34% last year to 65% in this edition. Kosovo*, in the other hand, is notable for having reversed the ratio between those agreeing and those who do not: nearly six out of ten (57%) on the positive side, a hike by the largest margin of all economies in the region (by 16%, from 24% in 2020) on this issue, versus 41% on the negative side, also a very significant improvement by 31% (from 72% in 2020).

Figure 93: How much do you trust certain institutions? (Results for the Western Balkans region)

(All respondents, N=6029, scale from 1 to 4, %)

A sign of somewhat positive developments over confidence in public institutions among Western Balkan citizens is an incremental increase in trust in most of those covered by the survey, except for local authorities and political parties. Results indicate that on average, at the regional level, Ombudsman institutions remain the most trusted and political parties the least trusted ones, the former by 44% of respondents (3% more than in 2020) and the latter by only 21% (3% less than in the 2020 edition).

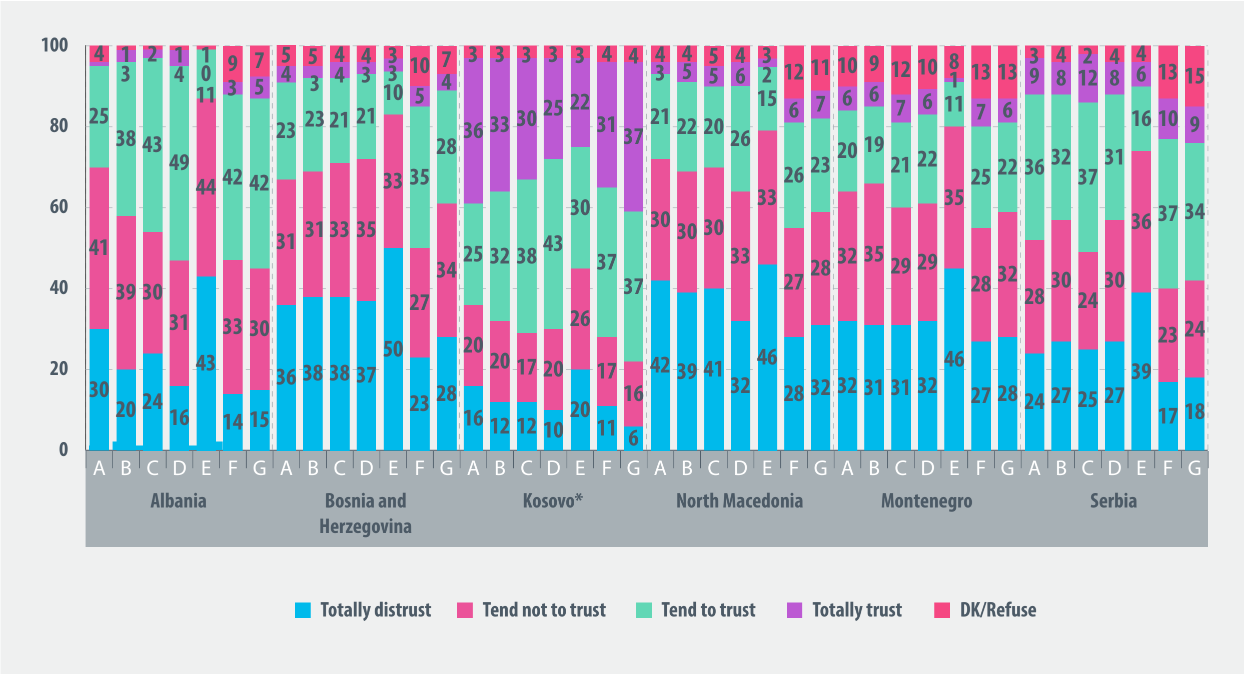
Likewise, while Ombudsperson institutions and supreme audit institutions are the only ones surveyed in the Barometer that remain distrusted by less than half of their respective populations (46% in both this round and in 2020), distrust towards political parties has increased to three-quarters (75%) of the survey population. Courts and judiciary institutions – at 60%, an improvement by only one percentage point since 2020 – remain the second most distrusted category. Confidence in supreme audit institutions is roughly equal to that enjoyed by ombudsperson institutions: they are trusted by 44% of respondents (a 5-point increase) and distrusted by 48% (a 2-point decline) of them.

Figure 94: How much do you trust 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

(All respondents, N=6029, scale from 1 to 4, %)



Confidence in institutions covered by the Barometer has not seen improvements in most economies in this round, remaining under half of survey populations in all but Kosovo*, where levels of confidence for all of them exceeds half of respondents. Starting with the judiciary and courts, six out of ten (61%) of those polled in Kosovo* trust them, as opposed to over one-third (36%) not trusting them. Trust in courts and judiciary in this economy since the previous round has increased by 30 points (it was at 31% in 2020) and distrust has decreased by 31% (from 67%). The highest level of distrust towards courts and judiciary institutions is in North Macedonia (at 72%), as opposed to 24% trusting them; it has incrementally worsened: 2% increase of distrust and 2% decrease of trust.

Parliaments enjoy higher levels of confidence than courts and judiciaries in some economies and lower ones in others. The level of confidence for the parliament in Kosovo* is slightly higher than for courts and judiciary: it is trusted by 65% of respondents (a 38-point hike from 27% in 2020) and distrusted by 32 of them (71% in 2020, a 39-point improvement). The highest levels of distrust towards parliaments are noted in Bosnia and Herzegovina and North Macedonia (at 69%), a 2-point increase in the former and 1% decrease in the latter.

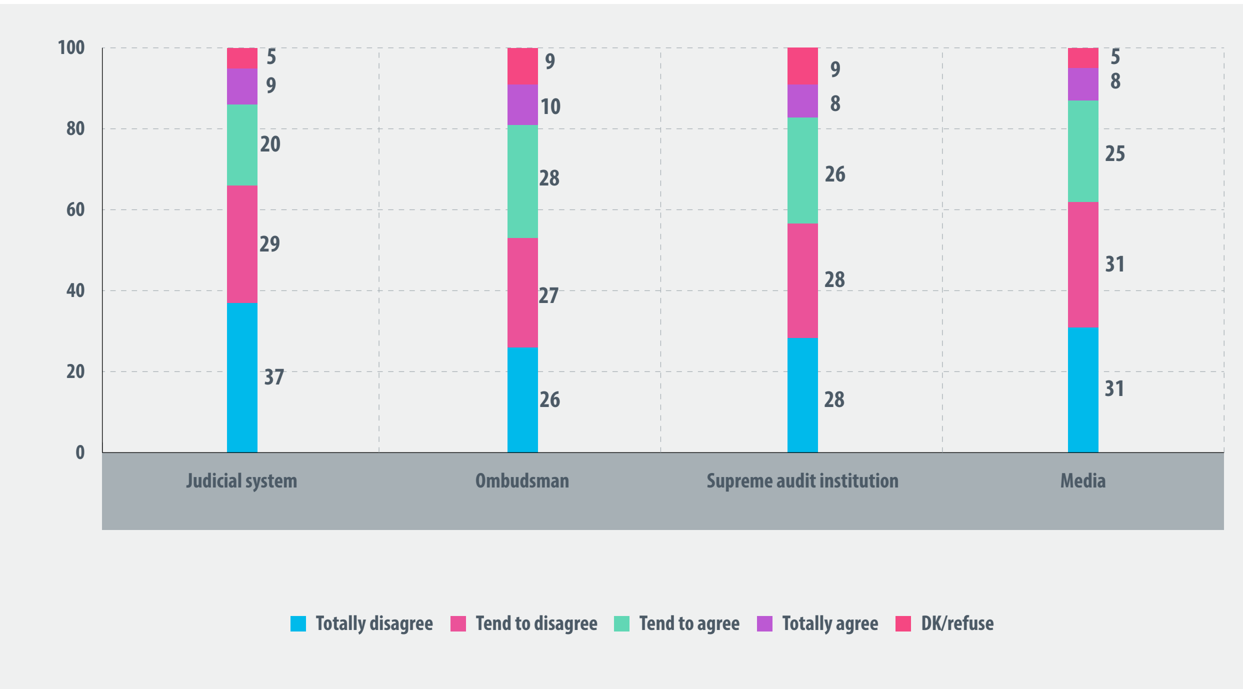
On another positive trend for Kosovo* compared to the previous round of the Barometer, it leads in terms of confidence in the Government – at 68%, a 42% hike from 26% in the previous round – having pushed Serbia to the second place, where the level of trust and distrust this year is equal (49%). On the other end of the scale, governments in Bosnia and Herzegovina and North Macedonia are distrusted by 71% of those polled, the same as last year in the former and 6% higher in the latter (from 65%). Kosovo* also leads in terms of the share of respondents who trust local authorities (at 68%), while they enjoy the highest level of distrust in Bosnia and Herzegovina (at 72%). Trust in the former increased by 33% (from 35% in 2020), and by 11% (from 61% in 2020) in the latter.

Political parties remain the most distrusted of the seven institutions covered in the Barometer. They are trusted by over half (52%) of respondents in Kosovo*, as opposed to a whopping 87% of them in Albania, a 16% deterioration in the latter (from 71% in 2020) and 30% improvement in the former (from 22% in 2020).

Ombudsperson institutions stand much better than justice systems, parliaments, central governments, and local authorities in terms of trust among their citizens. Kosovo* leads again, with 68% of respondents trusting this institution there (39% in 2020, an improvement by 29%), as opposed to 55% distrusting their respective Ombudsperson institutions in North Macedonia and Montenegro, a deterioration by 2% in the former (from 53% in 2020) and 13% in the latter (from 42% in 2020). Trust in supreme audit institutions is slightly lower than in ombudsperson institutions in most economies: it enjoys the highest level of trust in Kosovo*, by roughly three-quarters of respondents (74% of them), as opposed to the highest level of distrust in Bosnia and Herzegovina (at 62%). Trust in this institution has doubled (from 37% in 2020) in the former, while distrust has increased slightly (by 5%, from 55% in 2020) in the latter.

Figure 95: Do you agree that the following institutions are independent of political influence? (Results for the Western Balkans region)

(All respondents, N=6029, scale from 1 to 4, %)



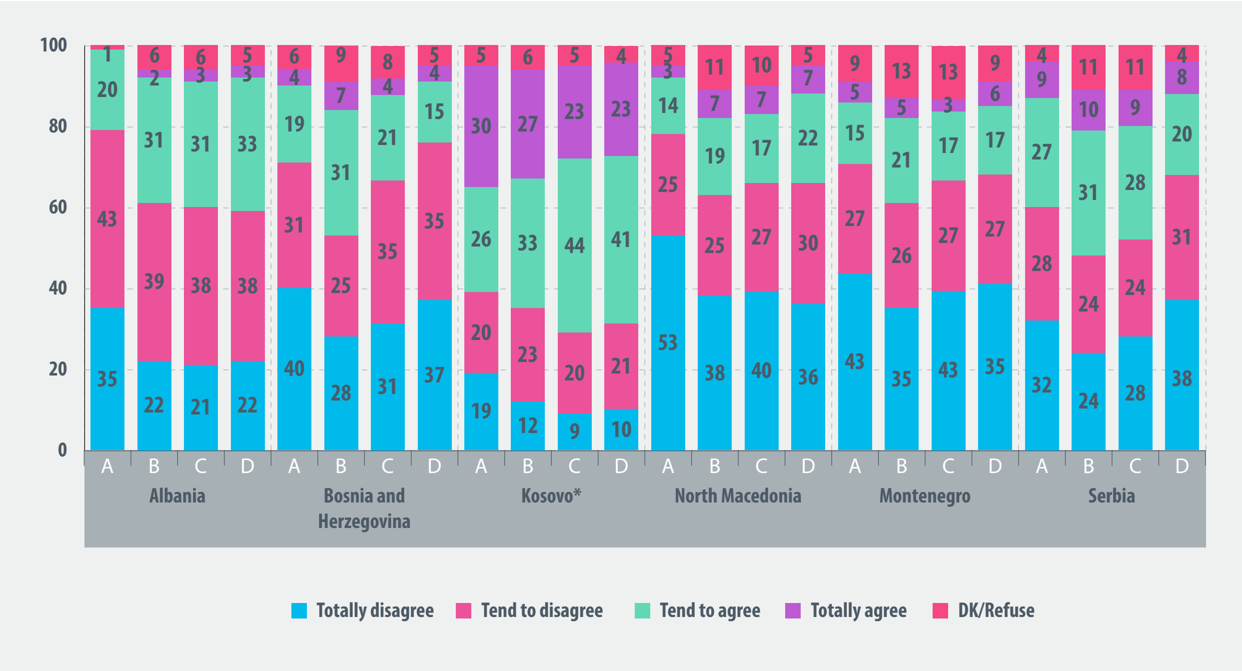
Though some independent institutions in economies of the Western Balkans included in the Barometer are perceived in a slightly better light by their respective populations in terms of general confidence they enjoy among the public, most respondents, by large margins, disagree when asked whether they are independent of political influence. In this regard, one can only see insignificant improvements by two percentage points from the last round, across the board.

In the perception of those polled, judicial systems remain the least independent of political influence: an average of two-thirds (66%) of them do not agree with the proposition that they are independent of political influence, while only 29% agree. On the other end of the scale, Ombudsperson institutions are perceived in a slightly less negative light in this regard, as just over half (53%) of respondents disagree with the proposition that they are independent of political influence. On the other hand, Ombudsperson institutions are seen as actually independent of political influence by 38% of respondents.

Figure 96: 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

(All respondents, N=6029, scale from 1 to 4, %)



With the exception of Kosovo*, perceived independence of the four categories of institutions covered in the Barometer from political influence has not improved much since the previous round. Starting from the judiciary, it is trusted by 56% of those polled in Kosovo*, while Albania lies on the other end of the spectre, with 78% disagreeing that this system is independent from political influence. This is a 31-point improvement in the former and a 9-point deterioration in the latter. Judiciary's perceived independence from political influence has deteriorated in North Macedonia (with distrust having increased by 3 points, from 75% in 2020 to 78% this year), and Montenegro recorded an increase of 10 points (from 60% in 2020, to 70% this year).

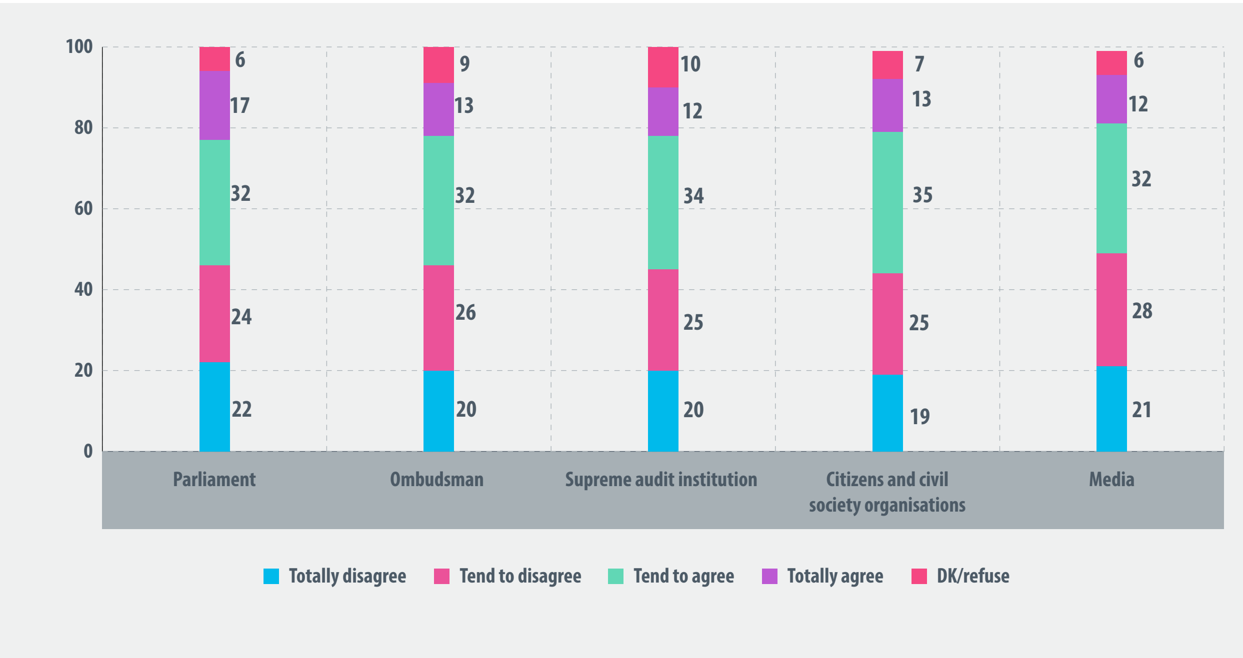
Ombudsperson institutions enjoy a higher degree of perceived independence than judiciary institutions in all economies, mostly in Kosovo* (at 60%, a 28-point hike from 32% in 2020) and the least in North Macedonia (at 63%, the same as in 2020). Supreme audit institutions enjoy about the same level of perceived political independence as ombudsperson institutions: about two thirds (67%) of those polled in Kosovo* perceive their SAI as independent of political influence, while the same share in North Macedonia do not agree that their SAI is independent of political influence. This is an in improvement by 36% in the former (from 31% in 2020) and a 4-point deterioration in the latter (from 63% in 2020).

In most economies, media are perceived as more independent of political influence than judiciaries, but less independent than supreme audit institutions and ombudspersons. They enjoy the highest level of perceived independence in Kosovo*, by nearly two-thirds of those polled (64%) but are not seen as such by over three-quarters (76%) of those polled in Bosnia and Herzegovina, a 40-point improvement in the former and and 11% deterioration in the latter.

Figure 97: 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=6029, scale from 1 to 4, %)



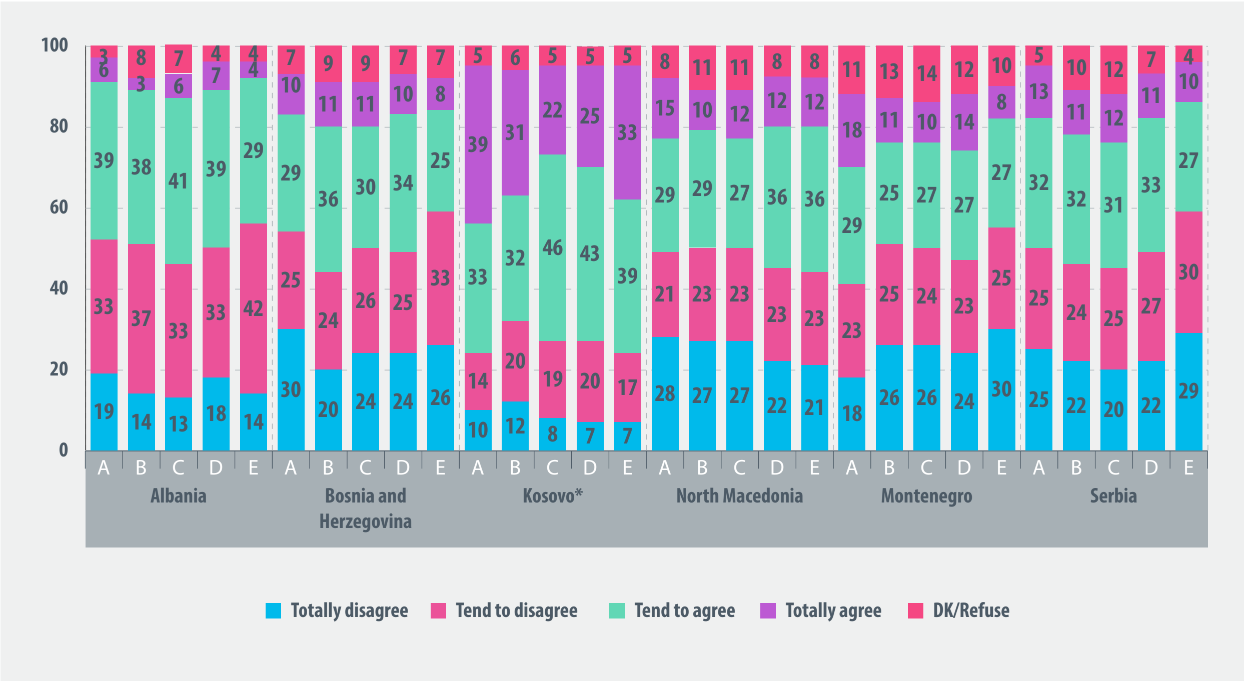
Like perceptions over the extent to which independent institutions are actually independent of political influence, one can note changes compared to the previous round of the Barometer in terms of the ability of such institutions to scrutinise respective economies' governments that are incremental and therefore insignificant. Such trends, ranging between 1 and 4 percentiles, are both improvements and deteriorations.

Parliaments lead in this round, seen by approximately half of respondents (49%) as capable of scrutinising governments, while 46% of them do not find them capable to do so. Media, on the other end of the scale, give the same picture as that on parliament turned upside down: 49% of those polled disagree with the proposition that they are capable of scrutinising governments, while 44% believe that they are not capable of doing so.

Figure 98: 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 - Citizens and civil society organisations; E - Media

(All respondents, N=6029, scale from 1 to 4, %)



Within individual economies, all the five institutions in Kosovo* are rated higher than in other economies in terms of their ability to scrutinise the government, as opposed to those in Bosnia and Herzegovina and Albania given lower ratings on this. Starting with parliaments, 72% of the survey population in Kosovo* (33% more than in the previous round) see the parliament as capable of scrutinising the government and make it accountable to citizens, while over half (55%, 1% more than last year) of those polled in Bosnia and Herzegovina disagree that their parliament is capable of doing so.

Ombudsperson institutions are perceived as slightly weaker scrutinisers than parliaments. Kosovo* leads in this regard as well, with nearly two-thirds (63%) of respondents there confirming that this institution is capable of doing so, as opposed to over half (51%) of those in Albania and Montenegro disagreeing. This shows that Kosovo* fares 16% better than in the previous round, while Albania has seen a 5 deterioration and Montenegro an even more significant worsening of the situation, by 14%. Supreme audit institutions have received higher ratings than ombudsperson institutions in most economies. On the positive side, Kosovo* leads on this as well: 68% of respondents there (22% more than in 2020) think that their SAI is capable of scrutinising the government. On the negative side, half (50%) of survey participants in Bosnia and Herzegovina, North Macedonia and Montenegro disagree when asked whether their SAIs are capable to scrutinise the respective governments.

Citizens and civil society organisations are viewed in most economies as slightly better government scrutinisers than both supreme audit institutions and ombudsperson institutions. Seen as capable as their supreme audit institution, citizens and CSOs in Kosovo* are seen in this Barometer as capable to scrutinise the government there by 68% of those polled, 27% more than in the 2020 round. On the other hand, over half (51%) in Albania (4% more than in the 2020 round) see citizens and CSOs as not capable to scrutinise the government there. Lastly, media in most economies have received a lower rating of the four categories of institutions covered here in terms of their ability to scrutinise governments. While they were rated the highest, with 72% of respondents there answering positively, nearly six out of ten respondents (59% of them) in Bosnia and Herzegovina and Serbia do not agree that media in these economies are capable to scrutinising the respective governments and making them more accountable. Compared to the previous round, Kosovo* has more than doubled its rating on the positive side (a 38% increase from 34% in 2020), whereas Bosnia and Herzegovina has seen a deterioration by 12% (from 47% in 2020) and Serbia by 10% (from 49% in 2020).

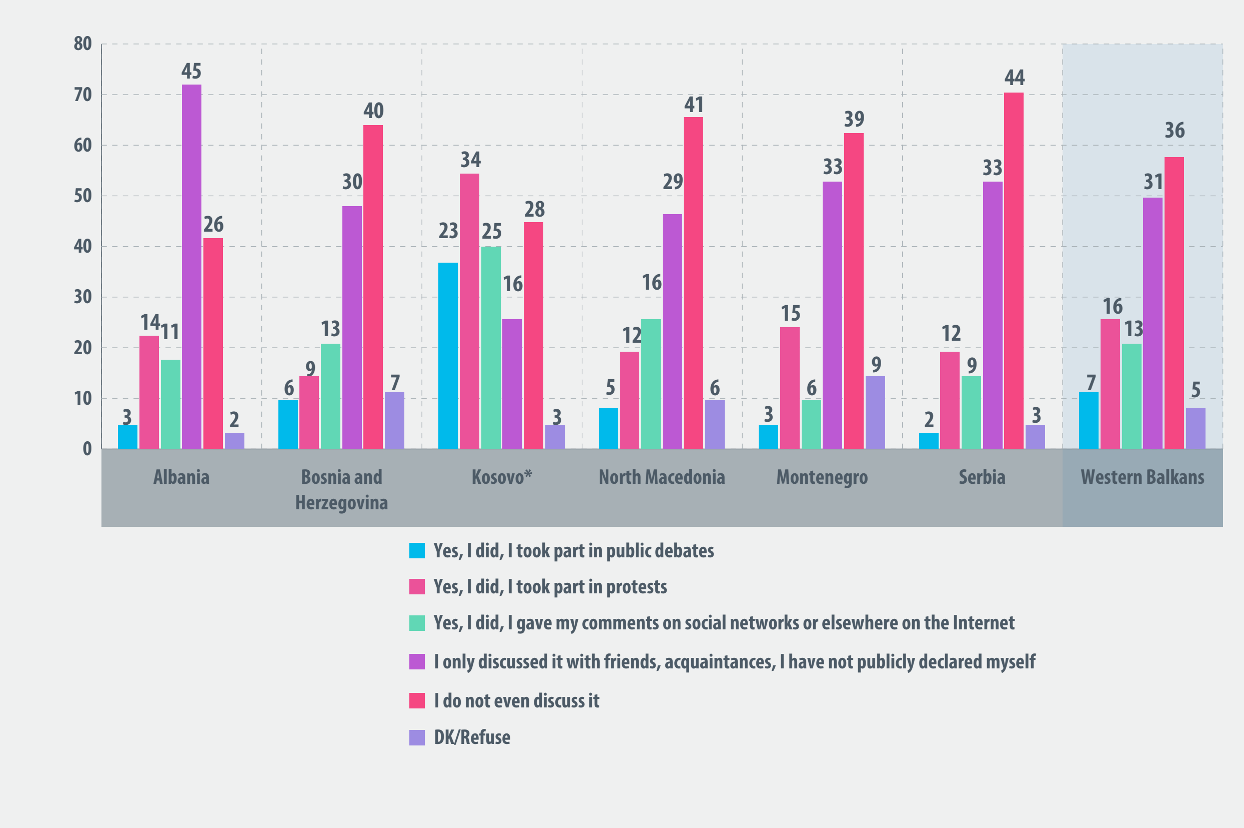
PARTICIPATION IN DECISION-MAKING

A clear correlation between low trust in institutions and government's performance and the level of apathy towards government decision-making persist across the Western Balkans. Though the mean share among survey participants of those who reported to have participated in some form or another has exceeded two-thirds (67%), discussing government decisions with friends and acquaintances remains the most common form of participation. The share of those exercising this most basic form of participation is at least about twice as many compared to number of those who took part in protests (16%), participated through social networks and otherwise through the Internet (13%) or took part in public debates (7%). The share of those who exercised this most basic form of participation in government decision-making is at around one-third of survey populations in most economies, reaching almost half (45%) in Albania, while nearly twice fewer (16%) in Kosovo* practiced this basic form of participation.

Reasons of citizens' disinterest in government decisions are roughly equally spread out. A regional average of almost half did not participate either because they feel powerless to influence government decisions (23%) or because they do not want to be publicly exposed (22%). Around one third either do not feel responsible to participate or do not trust their governments. Almost two-thirds (64%) in Bosnia and Herzegovina (the same as in 2020) did not participate because they feel either powerless, distrustful or simply careless towards their government and its decisions, as opposed to over half (57%) in North Macedonia. The share of those not participating because they trust their government or elected representatives in their parliament is the highest in Kosovo* (28%, from no-one in 2020) and the lowest in Bosnia and Herzegovina (12%, the same as in 2020).

Figure 99: Have you ever done something that could affect any of the government decisions?

(All respondents, N=6029, multiple answers, share of total, %



When it comes to citizens' participation to affect government decisions, the overall situation in the region has improved slightly compared to the previous edition of the Barometer. Thus, the mean percentage of those who participated in some form or another has reached more than two thirds of those polled (67%), improving by 8%, from 59% in 2020. However, the most common form of participation, practiced by nearly one third (31%) of the entire survey population (3% more common than last year), was discussing government decisions with friends, acquaintances, without publicly declaring themselves. Only 7% took part in public debates, 13% participated through social networks and other forms of public participation through the Internet, and 16% (4% more than in the last round) took part in protests.

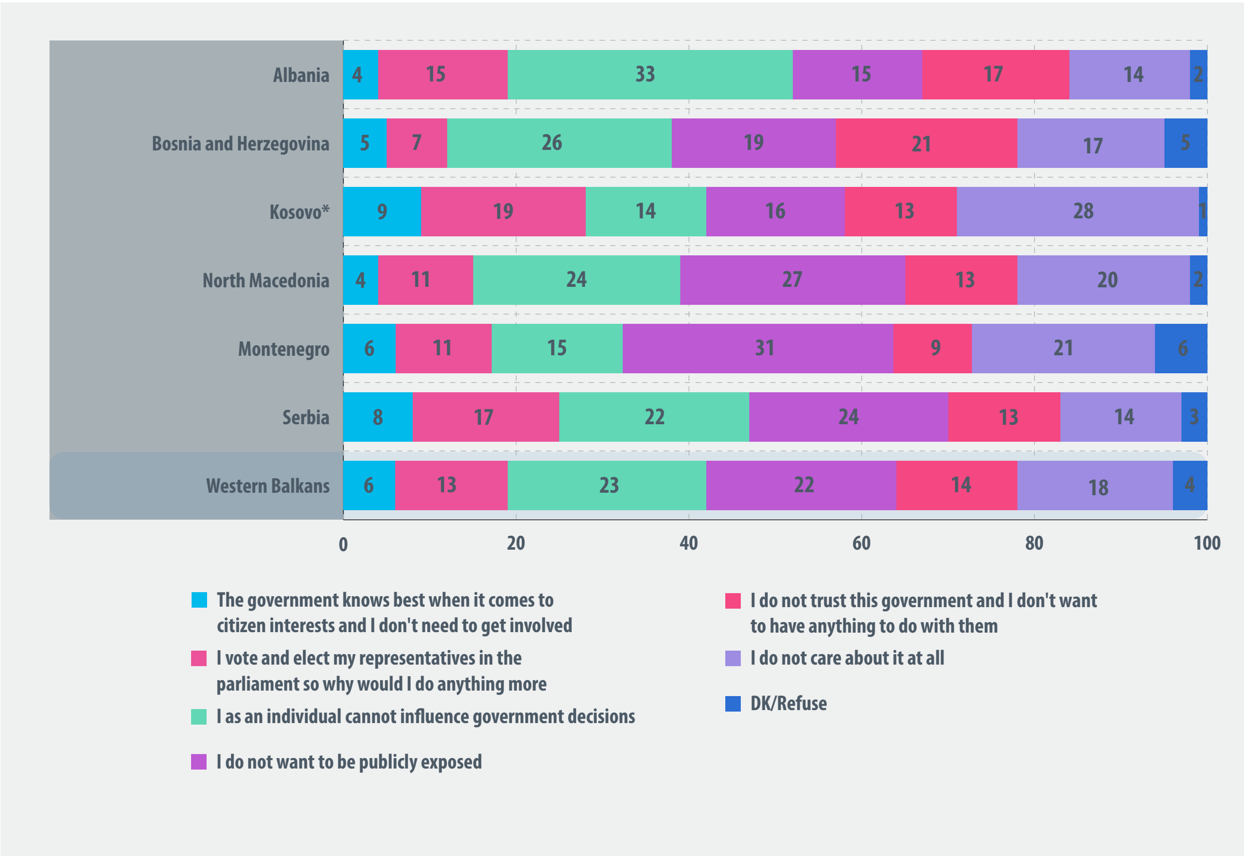
Within individual economies, almost half (45%) of those polled in Albania did not declare themselves publicly on government decisions, having only discussed them with friends and acquaintances. Whereas only 16% in Kosovo* practiced this basic form of participation, these groups of respondents in the other economies are twice as big (at around one-third of respondents). Albania and Kosovo* in fact switched positions on this indicator. While the share of respondents who practiced this form of participation has more than doubled, from 20% a year ago, to the detriment of more substantial participation, it has shrunk by over half in size (from 44% in 2020), to the benefit of other, more substantial forms of participation.

Otherwise, in Kosovo*, virtually everyone (98%) participated in some form or another, which is 26% more than in 2020 (72%). This is in contrast with Serbia, where only 56%, or only 8% more than in 2020 (48%), participated in some form. On the other hand, those who did not even discuss government decisions make up relative majorities in four of the six economies, the biggest one in Serbia (44%), as opposed to Albania, where such a group comprises 26% of survey participants.

Kosovo* also leads the region when it comes to the share of those polled who participated in protests (34%) and public debates (23). The lowest share in an economy of those polled who took part in protests is 9% (in Bosnia and Herzegovina) and of those who participated in public debates is 2% (in Serbia). Serbia also held the lowest record last year in terms of participation in both public debates (2%) and protests (7%). In other notable results, Kosovo* has the most active survey population who participated through social networks and elsewhere on the Internet (25%, 9% more than last year), while only 6% (a decrease by half, from 12% in 2020) in Montenegro used this form of participation.

Figure 100: What is the main reason you are not actively involved in government decision-making?

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



Of those who did not participate in government decisions, reasons for having done so are almost equally spread out. On average in the region, around five out of ten did not do so either because they feel powerless to influence government decisions (23%) or because they do not want to be publicly exposed (22%). The rest either do not feel any responsibility to do so (18%) or distrust their governments (14%). Two last groups consist of those who either have delegated this task to elected representatives (13%) or trust their government and thus do not see their participation as needed (6%). A positive trend compared to the previous round is a decline by one-third (by 12%, from 48% to 36%) of the share of those who either do not trust their government, are simply disinterested or ignored the question.

Within individual economies, almost two-thirds (64%) of the survey population in Bosnia and Herzegovina (63% in 2020) said they are not actively involved in their government's decision-making because they feel either powerless (26%), distrustful of the government (21%) or simply careless towards its decisions (17%). On the other end, this group makes up 57% of those polled in North Macedonia (24% feel powerless, 20% simply do not care and 13% do not trust their government). The share of those not participating because they trust their government or elected representatives in their parliament remains relatively low: Kosovo* (at 28%, no-one in 2020) leads on this, as opposed to Bosnia and Herzegovina (12%, the same as in 2020).

RULE OF LAW

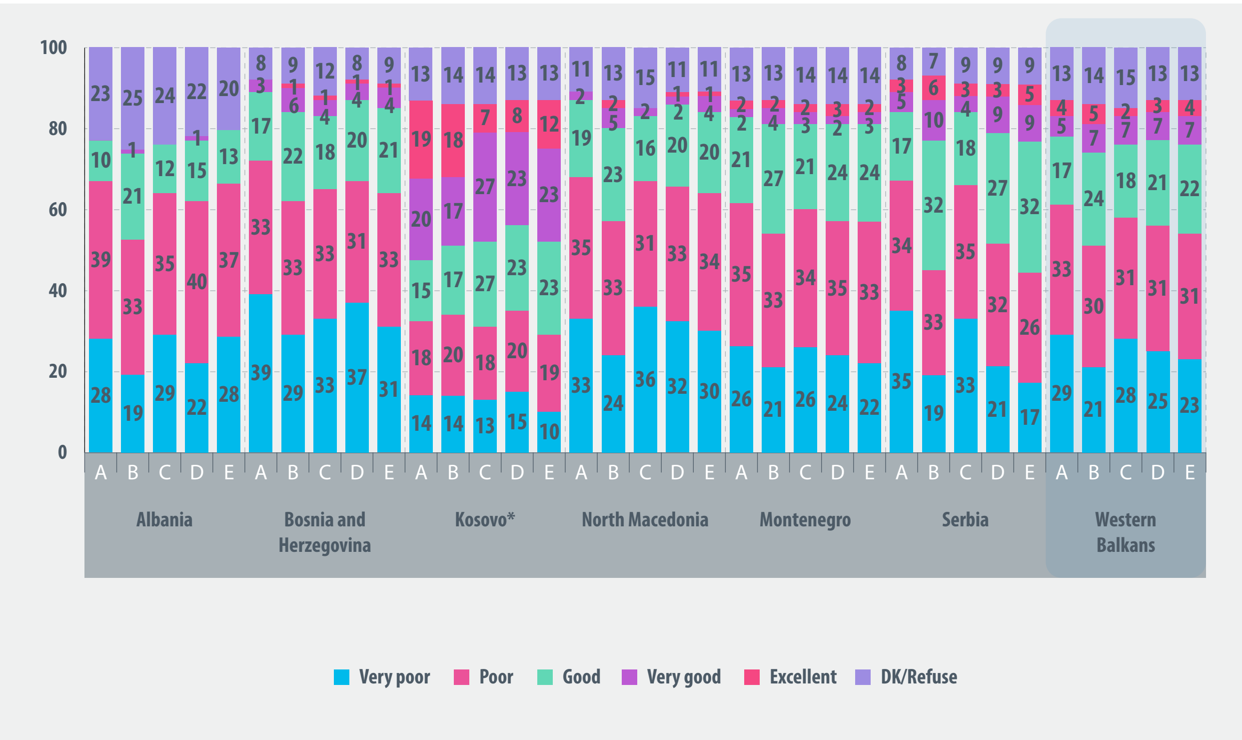
The trend of incremental improvements in citizens' trust in judiciaries in the region found in the previous round of the Barometer has seen a reversal in this round. The region has, on average, seen an upward trend of negative rating of all the five indicators. Length of proceedings and accessibility have deteriorated by 5%. They have deteriorated on cost of proceedings by 4%, on execution by 3%, and on transparency by 2%.

According to citizens' perception, proceedings in North Macedonia are the lengthiest in the region (68% in negative ratings) and the least so in Kosovo* (54% in positive ratings). Justice system institutions are seen as the least accessible in Bosnia and Herzegovina (62% in negative ratings) and the most accessible in Kosovo* (52% in positive ratings). Judicial proceedings are considered the costliest in North Macedonia (67% in negative ratings) and the least so in Kosovo* (55% in positive ratings). Bosnia and Herzegovina is considered the worst performing economy in terms of execution of judgments (68% in negative ratings) and the best performing in Kosovo* (53% in positive ratings). The justice system in Albania is perceived the least transparent in the region (65% in negative ratings) and the most transparent in Kosovo* (58% in positive ratings).

Figure 101: 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=6029, scale from 1 to 5, share of total, %)



In citizens' view, performance of justice systems in the Western Balkans has slightly deteriorated since the 2021 Barometer, as seen in the upward trend of negative rating of all the five indicators: length of proceedings – from 56% to 61%, accessibility – from 46% to 51%, cost of proceedings – from 55% to 59%, execution – from 53% to 56%, and transparency – from 52% to 54%.

On length of proceedings in the justice system, North Macedonia replaced Bosnia and Herzegovina as the leading economy with negative rating, at over two-thirds (68%), 7% higher than in 2020, as opposed to the lowest share in Kosovo*, where 54% rated their justice system positively, an improvement by 12% (42% in 2020). Bosnia and Herzegovina and Kosovo* stand on the opposite ends of the scale on accessibility of their justice systems, with 62% in the former rating its justice systems negatively and 52% positively in the latter. The former deteriorated its rating by 8% (54% in 2020) and the latter by 6% (46% in 2020).

A similarly poor assessment to that on length of proceedings is shared by respondents on their cost, with over two-thirds in North Macedonia (67%) rating them as poor or very poor, as opposed to Kosovo*, where 55% rated them as good, very good or excellent. About the same share of negative rating on this indicator (65%) was recorded last year in North Macedonia, while Kosovo* further increased positive rating by 9% (from 46% in 2020). On execution of judgments, Bosnia and Herzegovina leads on the negative side, with 68% of respondents (an improvement by 5% compared to 63% in North Macedonia in 2020), while over half (53%) in Kosovo* gave positive ratings (an improvement by 9%, from 44% in 2020).

Lastly, the justice system in Albania is the least transparent in the region. This economy has the biggest share of respondents (65%) compared to other economies who rated this system there negatively in terms of transparency. Kosovo*, where 58% rated their system positively in terms of transparency, lies on the other end of the spectrum. The trend since 2020 on the negative side is one of deterioration (by 7%, from 58%, in Bosnia and Herzegovina), as opposed to an improving one on the positive side (by 17%, from 41%, in Kosovo*).

IMPACT FROM COVID-19

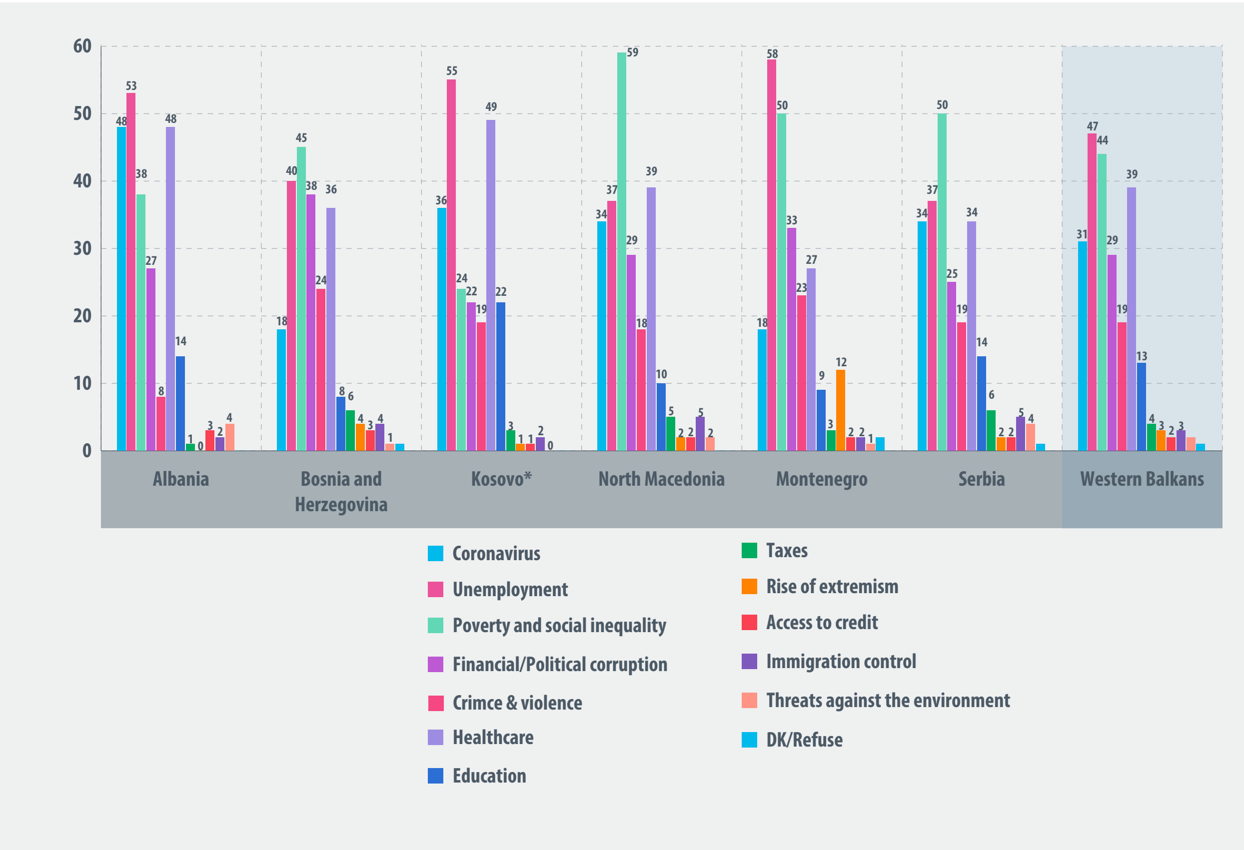
PERCEPTION OF THREAT & PRESENT SITUATION ASSESSMENT

Given that the COVID-19 pandemic has almost been overcome in all economies of the region, this round of the Barometer only focuses on effects of multiple crises caused by the pandemic. In this context, the survey looks specifically at what effects of the crisis citizens perceive to be the most worrying. However, some of the covered aspects are wider concerns in the present situation that are not necessarily a consequence of the pandemic only, or solely related to it.

At the regional level, top five concerns are the following: unemployment (at 47%), poverty and social inequality (44%), healthcare (39%), coronavirus (31), and corruption (29%). The most significant trend is a 21% decrease (from 52% in the previous round) in the number of respondents who see the coronavirus as the most worrying issue. The share of those mostly worried by unemployment has also decreased by 11% (from 58% in 2020), while the proportion of those who find corruption the most worrisome issue has seen a 10% upward trend (from 19% in the previous round). Within individual economies, unemployment tops the list in Montenegro (at 58%, the same as in 2020), while North Macedonia and Serbia (both at 37%) stand on the other end of the scale. The former has seen a 20% decrease (from 57% in 2020), while the latter has seen no change.

Figure 102: Which of the following topics do you find the most worrying in your economy amidst the pandemic crisis?

(All respondents, N=6029, scale from 1 to 12, share of total, %)



While unemployment remains the most worrying in circumstances of the pandemic still being around and economies tackling its socio-economic effects, the coronavirus itself has since the previous round of the Barometer dropped in the list of top concerns for respondents in the region overall, from the second to the fourth place. Survey results show that the top five concerns, from the most to the least important, are the following: unemployment, poverty and social inequality, healthcare, coronavirus, and corruption. The most significant trend since the 2020 round is a 21% decrease (from 52%) in the number of respondents who see the coronavirus as the most worrying issue, followed by a 11-point decrease in the share of those mostly worried by unemployment (from 58%), and a 10% increase in the proportion of those who find corruption the most worrisome issue (from 19%).

Within individual economies, unemployment tops the list in Montenegro (at 58%, the same as in 2020), followed by Kosovo* (at 55%, an 11-point drop from 66% in 2020), while North Macedonia and Serbia (both at 37%) stand on the other end of the scale. North Macedonia has seen a 20% decrease (from 57%) since 2020, while Serbia has seen no change. Poverty and social inequality worry almost six out of ten respondents in North Macedonia (59% of them, a 10% more than 49% in 2020), as opposed to about every fourth (24%) respondent in Kosovo* (down from 36% in 2020).

Healthcare is the most important concern for roughly half (49%) in Kosovo*, as opposed to 27% in Montenegro, a 12-point increase in the former (from 37% last year) and a 6-point decrease in the latter (from 33% last year). This suggests that the pandemic has increased health awareness in Kosovo* and decreased it Montenegro, possibly also due to a better functioning healthcare system in the latter. The coronavirus is the biggest concern in Albania (at 48%, 14% less than in 2020), as opposed to about five out of ten (18%) in Montenegro and North Macedonia, very significant decreases in both since 2020 (by 34 points in the former and 44 points in the latter).

Lastly, Bosnia and Herzegovina has the biggest share of respondents compared to other economies that are concerned by political and financial corruption (38% of them), as opposed to Kosovo* (at 22%). This shows a deterioration since the previous round in both, respectively by 10% (from 28%) in the former and 6% (from 18%) in the latter. However, this is an indication of how successful the respective economies are in fighting corruption, as perceived by their citizens.

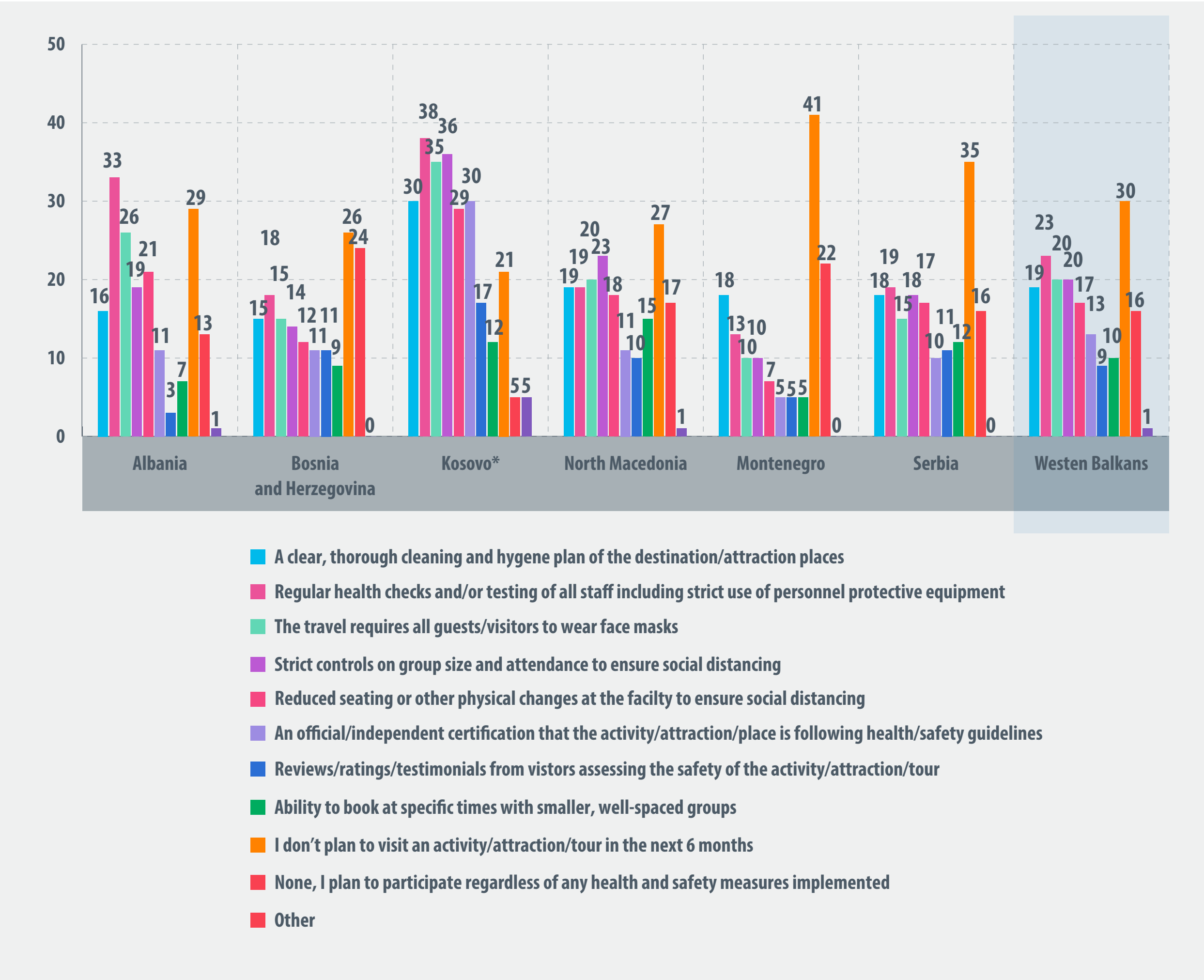
ASSESSMENT OF MITIGATION MEASURES

Scepticism over governments' efforts to protect people from losing their jobs during the COVID-19 pandemic persists in this round as well. A regional average of nearly half (48%) of respondents think that their respective governments are not doing enough to protect them from losing their jobs, as opposed to over a quarter (26%) who think that they are doing enough. At the economy level, whereas Bosnia and Herzegovina remains home to the biggest share of respondents (64%, a 7-point increase since the last round) who do not think that their government is helping in saving jobs, Kosovo* has seen the most significant improvement, making it the most optimistic economy on this. In this economy, 55% of those polled, an overwhelming 50% more than in the previous round (5%) think that the government there was doing enough to save their jobs.

With regard to mitigation measures taken to protect themselves from COVID-19, the biggest group of respondents (30%) said they would prefer not to travel. The rest would mainly favour regular health checks and/or testing of all staff, including strict use of personal protective equipment (23%), face masks (20%) or a clear thorough cleaning and hygiene plan of destination/attraction places (19%). Almost a third (30%) said they planned to abstain from traveling and outdoor activities, while nearly half (16%) would engage in such activities regardless of health and safety measures.

Figure 103: Due to health and safety measures imposed by COVID-19 pandemic, what is the most important when considering travel and outdoor activities, attractions and places to visit?

(All respondents, N=6029, scale from 1 to 8, share of total, %)

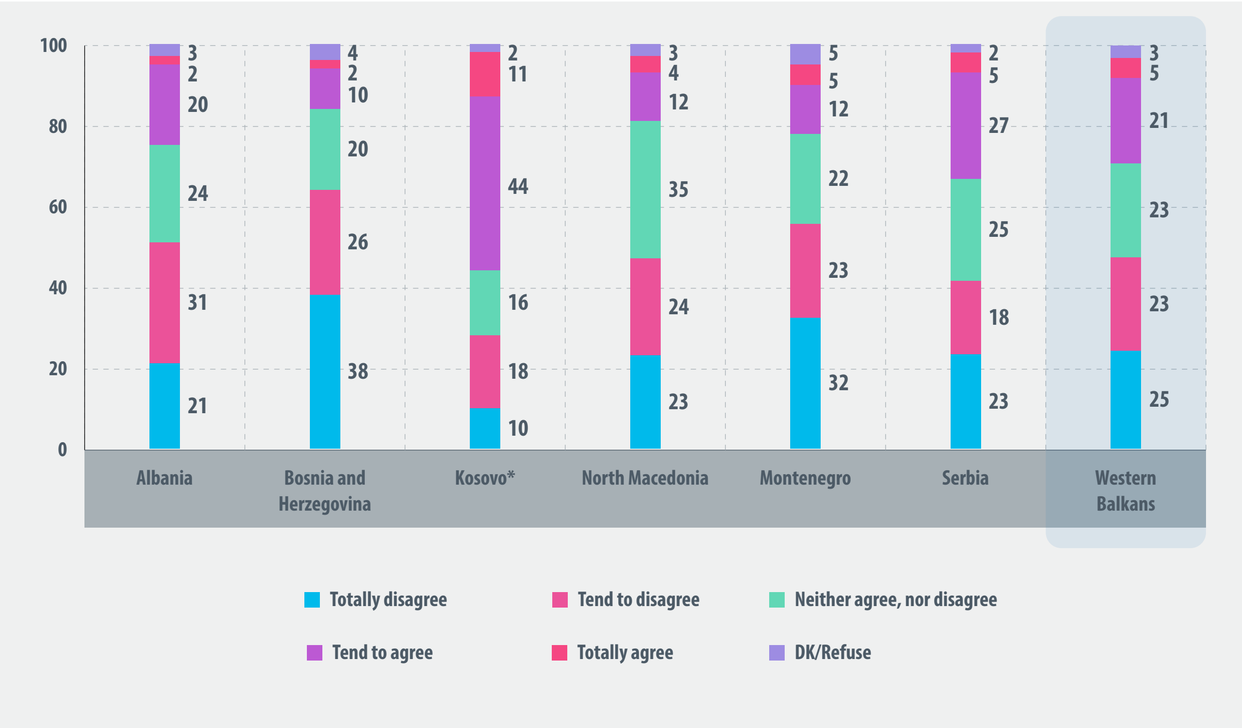


At the regional level overall, the biggest group of respondents (37% of them, 18% in 2020) said they would prefer social distancing, followed by 23% (7% more than in the previous round) preferring regular health checks and/or testing of all staff, including strict use of personal protection equipment. Roughly one-fifth of the overall survey population would prefer either a clear thorough cleaning and hygiene plan of destination/attraction places (13% in 2020) or wearing of face masks (10% in 2020). The share not planning to travel and engage in outdoor activities grew to 30%, while 16% would do so regardless of health and safety measures.

Looking at each economy, Montenegro has the highest share of abstaining ones (41%), having nearly doubled from 22% in the previous round, followed by Serbia (35%, an 8-point from 43% in 2020). Kosovo* has the highest number of respondents preferring a combination of all types of measures distributed most equally (in the range of 29% to 40%), while Montenegro has the lowest rates for all of them (at only 5% to 19%). As in the previous round, Kosovo* remains the economy with the lowest share of abstaining respondents compared to other economies (21%, almost tripling from 8% in 2020). The biggest group of respondents in this economy (38% of them, a 15-point increase from 23% in 2020) are those who would engage in such activities while applying regular health checks and/or testing of staff, including strict use of personal equipment. Such a group is the smallest in Montenegro, comprising 13% of those polled, a slight, 3-point decrease from 16% in 2020.

Figure 104: To what extent, if at all, do you agree or disagree, with the following statement: The Government is doing enough to protect people from losing their jobs?

(All respondents, N=6029, scale from 1 to 8, share of total, %)



Overall, in the region, the share of citizens falling in all the three categories has increased since the previous round of the Barometer: of those thinking that their governments are not doing enough to protect them from losing their jobs, of those who think that this is not the case, and of neutral ones. A majority of nearly half (48%) of those polled, 9% more than in 2020, think that their government is not doing enough to protect them from losing their jobs. On the other hand, only around a quarter (26%) of them, 4% more than in the previous round, think that governments are doing enough, and 23% (an 11-point decrease from 34% in 2020) are neutral.

Bosnia and Herzegovina is the economy that is home to the biggest share of respondents (64%, 7% more than in 2020) who do not think that their government is helping in saving jobs, followed by Montenegro (with 55%, 12% more than in 2020). On the other end of the scale, Kosovo* is the most optimistic economy on this (with 55% positive answers, an overwhelming 50% more than in 2020), also the most significant improvement on this. North Macedonia is home to the largest share of neutral respondents (35%), having replaced Kosovo*, where 41% of respondents shared this opinion in 2020. North Macedonia is also home to the smallest share of those polled who think that their government is doing enough to save their jobs (16%, 10% less than in 2020).

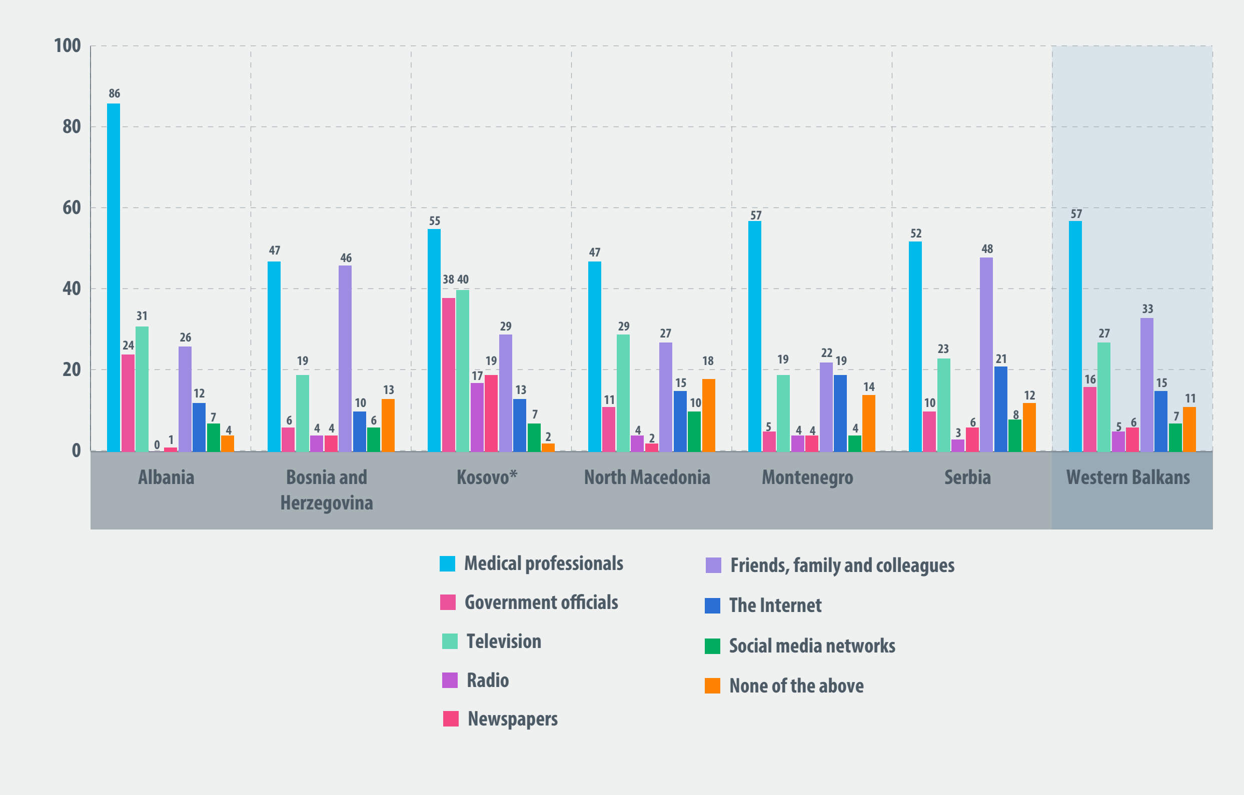
CONFIDENCE IN SOURCES OF INFORMATION

As in the previous round, across the Western Balkan region, medical professionals remain the most credible sources of information on coronavirus. At the regional level, an average of nearly six out of ten (57%) respondents, only 3% less than in 2020 trust them. Other main trusted sources are friends, family and colleagues (at 33%) and television (27%). Medical professionals are most trusted in Albania (86%) and least trusted in Bosnia and Herzegovina and North Macedonia (both at 47%).

On the other hand, survey data from this cycle show that public concern over circulation of disinformation in the context of the pandemic is declining. On average, over half of those polled (52%) in the region are concerned, while 46% are not concerned. The share of those worried has declined by 15% and of those not worried has increased by 17%. The highest risk of disinformation in the context of COVID-19 is perceived in North Macedonia (at 61%), while Montenegro has the highest number of those polled not concerned by it (50%).

Figure 105: Which of the following sources of information do you have the most confidence in with regards to the accuracy of information they provide on the coronavirus?

(All respondents, N=6029, scale from 1 to 8, share of total, %)

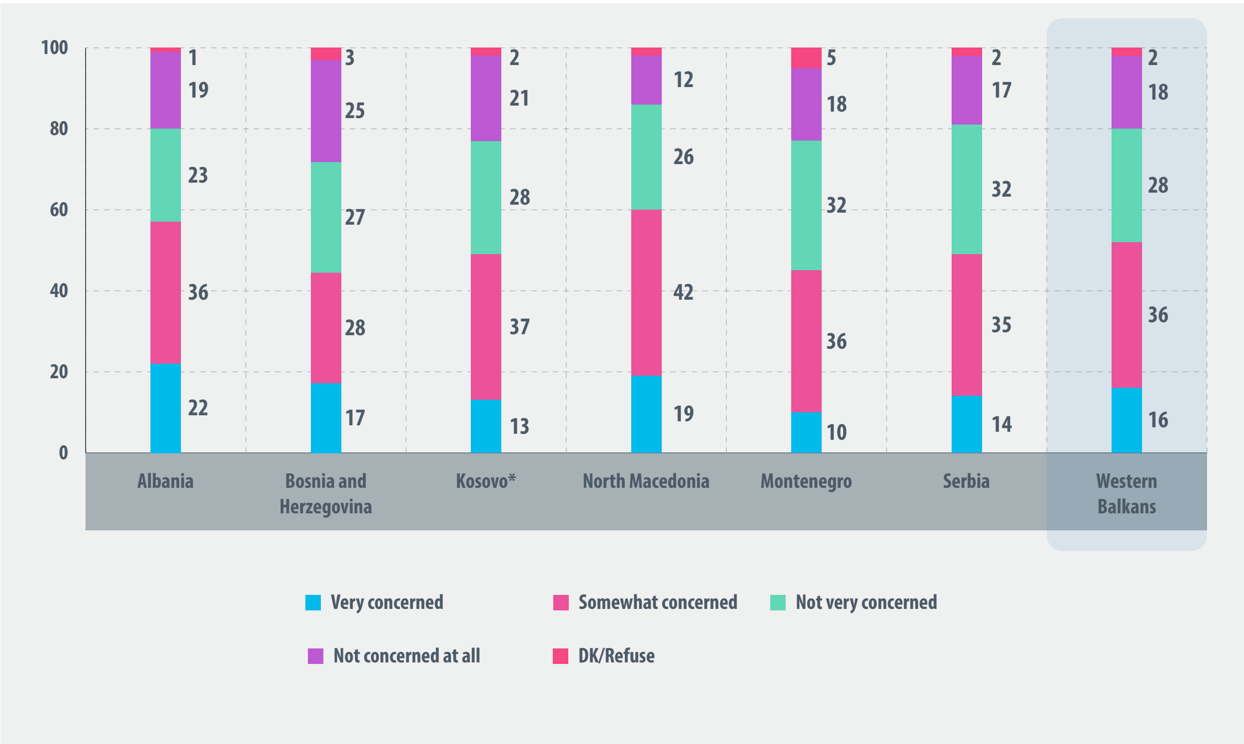


Medical professionals remain the most trusted source of information on coronavirus at the regional level overall and enjoy quite high levels of trust in all economies. They enjoy the trust of nearly six out of ten of those polled (57%), a slight decrease since 2020. The second biggest category are friends, family, and colleagues, trusted by a mean one-third of survey participants (33%, only 1% less than in 2020), followed by television, trusted by over one-fourth (27%, 5% less than in the previous round). Radio stations, at 5%, and newspapers, at 6%, are the least trusted categories of sources.

Within individual economies, medical professionals enjoy the highest level of trust in Albania (86%), the huge 24-point hike in the positive direction in this economy from the third to the first place since the previous round of the Barometer, an improvement by the highest margin compared to other economies. It is followed by Montenegro (at 57%, the same level as the regional average), while they are trusted the least in Bosnia and Herzegovina and North Macedonia (both at 47%), a 1% decrease in the former and 10% in the latter. Friends, family, and colleagues (at 48%) is the group enjoying the highest level of trust in Serbia (at 48%) and the lowest in Montenegro (at 22%). Social media networks enjoy the highest level of trust in North Macedonia (by 10% of those polled, a 1% decrease) and the lowest in Montenegro (by 4%, a 2% decrease). Notably, the level of trust in radio stations in the latter economy has seen an upsurge since the previous round (from 1% to 17%) and is thus higher than the regional average by a large margin.

Figure 106: How concerned are you with the circulation of disinformation in the context of COVID-19?

(All respondents, N=6029, scale from 1 to 5, share of total, %)



Survey data from this cycle of the Barometer show that public concern over circulation of disinformation in the context of the pandemic is declining hand in hand with the defeat of the pandemic itself. Overall, at the regional level, only over half of those polled (52%) are concerned, while 46% are not concerned. The percentage of those worried about it has declined by 15% since 2020 and the share of those not worried about it has increased by 17%.

On the other hand, the highest risk of disinformation is perceived in North Macedonia, the economy that is home to the largest share of respondents worried by this (61% of those polled, 9% less than in 2020), having pushed Albania to the second most concerned economy. Montenegro has the highest number of respondents not concerned by disinformation in the context of COVID-19 (50%).

OUTLOOK / FUTURE ACTIONS AND EXPECTATIONS

Given the need to tackle economic consequences of the pandemic and move beyond post-pandemic economic recovery, economic growth remains a priority for a mean of around half (49%) of those polled, followed by health and wellbeing (at 28%), social progress (at 19%) and environmental protection (at a mere 3%). A new question of this chapter of this edition of the Barometer shifts the focus from specific measures to a general assessment of all measures taken together, opinions are spread roughly equally between the dissatisfied (36%), satisfied (32%) and neutral ones (31%). The EU continues to be seen as the biggest supporter in fighting the pandemic through medical, financial, and other donations by a regional average of 41%, while the share of those polled who think that their economy received support from other Western Balkan economies has almost doubled, reaching 13% (7% in 2020). The rest in the list of supporters are China and Turkey (both at 11%) and Russia (8%).

The most notable trend with regard to immunisation is a significant reduction of those not willing to take the vaccine. At the regional level, the share of the latter reduced almost by half, to 25%, while the pro-vaccine group grew by 15% (to 71%). Of those not willing to undergo immunisation, 39% worry about side effects (18% less than in 2020). Somewhat worrisomely, the share of those who do not find the vaccine effective against the coronavirus has increased by 8% (to 27%), while the group of respondents sharing a general anti-vaccine sentiment (14%) is also quite big.

Figure 107: In your opinion, during the pandemic, who supported 'ECONOMY' the most in terms of making medical, financial or other donations?

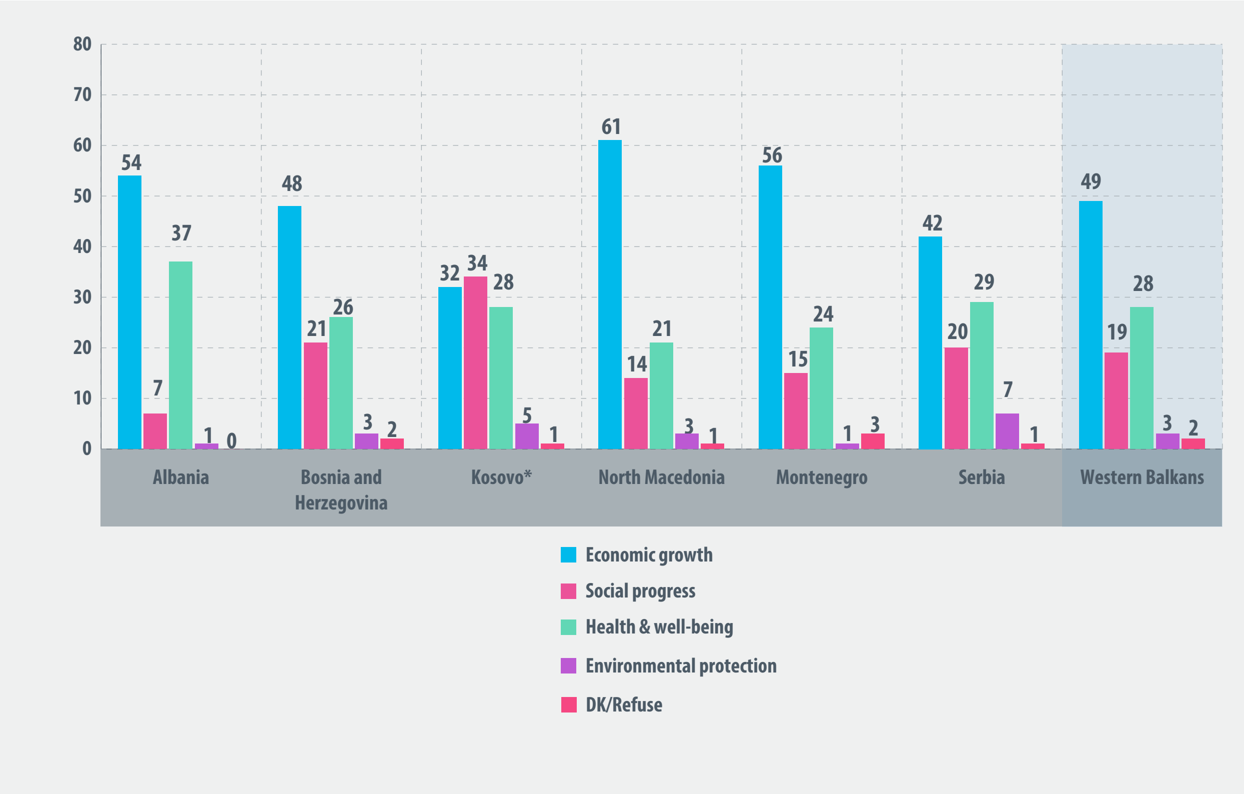
(All respondents, N=6029, scale from 1 to 8, share of total, %)

At the regional level, overall, the EU continues to be seen by a relative majority of respondents (41%) as the biggest supporter in fighting the pandemic through medical, financial and other donations, despite a slight drop in this share of respondents compared to the 2020 Barometer. A more notable trend is an increase in the share of those polled who think that their economy received support from other Western Balkan economies: the size of this category of respondents has almost doubled, making up the second biggest group (13%, up from 7%). China and Turkey rank now the fourth group by the share of support (both at 11%), followed by Russia and others.

Kosovo* remains home to the biggest group of respondents, by the widest margin of all economies (67%), who think that their economy received the most support by the EU in fighting the pandemic. This share has grown smaller (by 11%), seemingly because the group of respondents who think that their economy was mostly supported by neighbouring economies grew by 7% (from 4% in 2020), becoming the second biggest group, a position occupied last year by Turkey. In Serbia, on the other hand, China is still perceived as the biggest supporter of this economy by a relative majority (40%), though 14% less than last year. This decrease might be due to a bigger share of those who think that this economy was mostly supported by the EU (by 7%, from 16% to 23%) and Russia (by 4%, from 17 to 21%). On another note, Bosnia and Herzegovina has replaced North Macedonia as the economy with the highest share of respondents who think that this economy was mostly supported by other Western Balkan economies, as opposed to Serbia (2%).

Figure 108: Imagining the COVID-19 pandemic is over, what should your economy prioritise more?

(All respondents, N=6029, scale from 1 to 8, share of total, %)

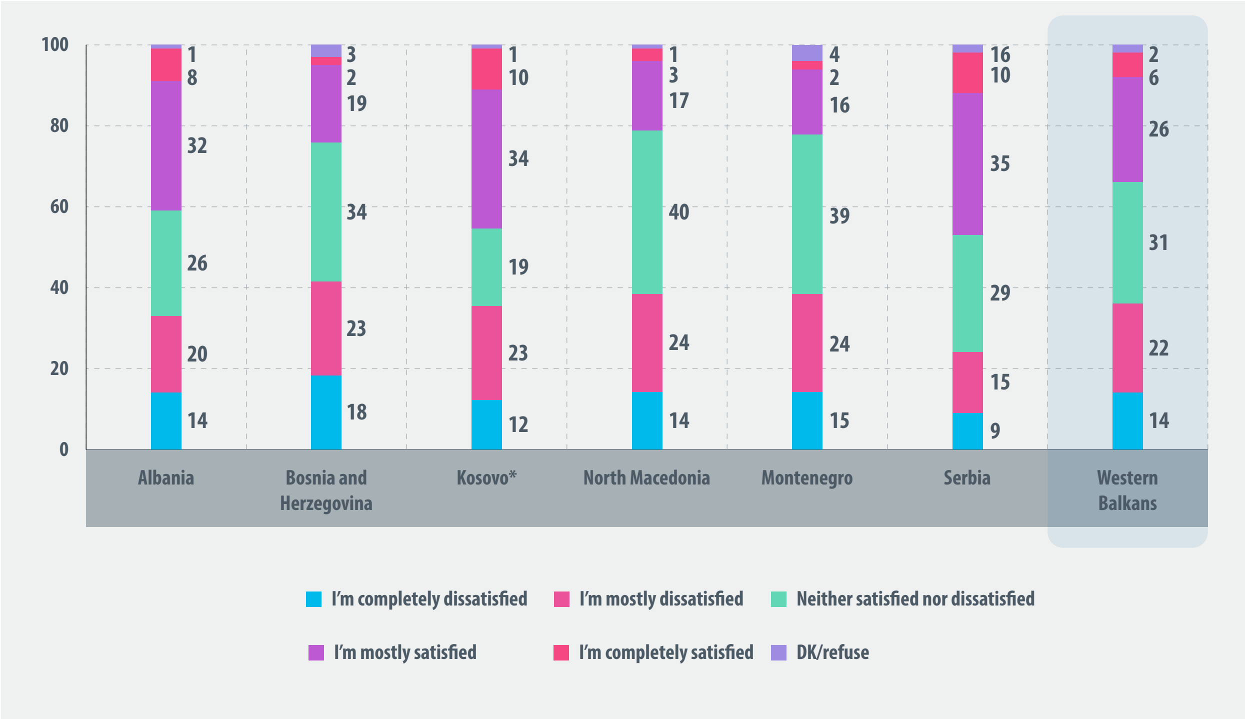


In light of the need and ongoing efforts to tackle economic consequences of the pandemic and thus move beyond post-pandemic economic recovery, economic growth remains a priority overall in the region of Western Balkans for about half of those polled (only 7% less than in the previous edition), followed by health and wellbeing, virtually by the same share of respondents as last year (around 3 out of 10 of them), and social progress (by roughly 2 out of 10 of them, 5% more than in 2020). Environmental protection is the least important to them, favoured by only 3% (slightly up from 2% last year).

Compared to the previous edition, North Macedonia has replaced Kosovo* as the economy that is home to the biggest share of respondents prioritising economic growth (61% of them, a slight increase by 3%). It is followed by Montenegro (at 56%) and Albania (at 54%). This year, Kosovo* is home to the lowest number of respondents prioritising economic growth (only about one-third of them), a dramatic decrease by 39%, from 71% in 2020. Interestingly, citizens of this economy prioritise social progress and protection of the environment almost as high as economic growth (34% and 28% of them, respectively), thus marking the most significant year-on-year increase of any category in all economies (by 28%, from 6% last year).

Figure 109: Thinking about your economy's Government's response to coronavirus outbreak, how satisfied are you with the measures taken to fight coronavirus pandemic?

(All respondents, N=6029, single answer, scale from 1 to 5, share of total, %)

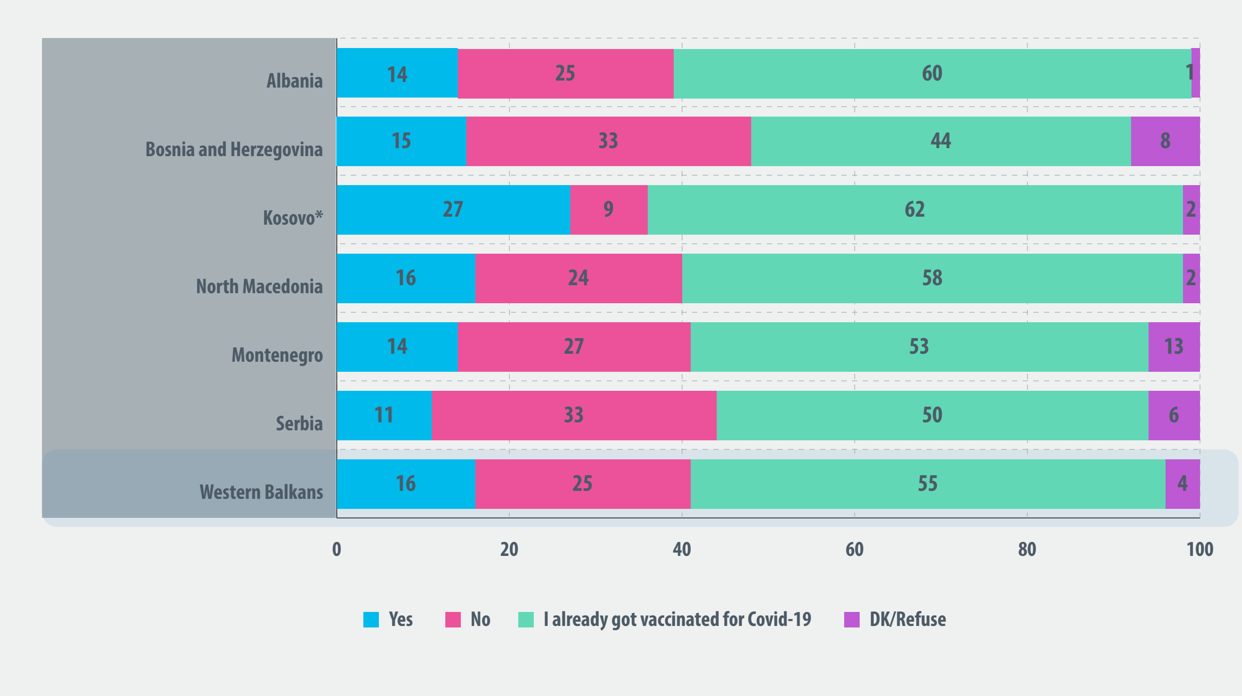


This new question in this edition of the Barometer shifts the focus from specific anti-pandemic measures to a general assessment of all measures taken together so that one can reflect from a perspective when the pandemic is more or less overcome. Seen from this point in time, on average in the Western Balkan region, respondents' opinions are spread roughly equally between the dissatisfied (36%), satisfied (32%) and neutral ones (31%).

Focusing on economies of the region separately, the number of respondents assessing anti-pandemic measures positively diverges by significant margins. Of all respondents in Serbia, satisfied ones constitute the biggest group (45%), as opposed to almost every fourth (24%) of them being dissatisfied and nearly three in ten (29%) being neither satisfied nor dissatisfied. The second most satisfied economy is Kosovo* (at 44%). On the other end of the scale lies Montenegro, where only 18% are satisfied with anti-pandemic measures taken in their economy and just under four out of ten (39%) are either dissatisfied or neutral. In addition, North Macedonia has the biggest group of neutral respondents (40% of them).

Figure 110: Are you willing to take a vaccine for COVID-19?

(All respondents, N=6029, scale from 1 to 8, share of total, %)

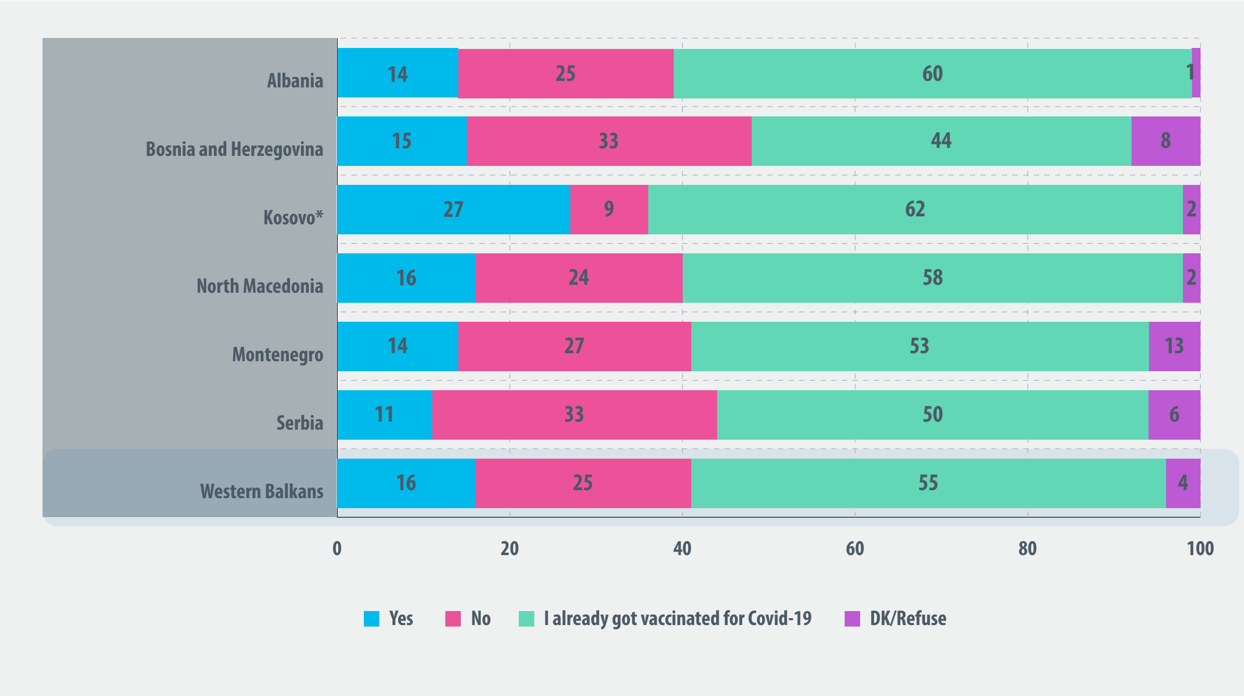


The most notable trend with regard to immunisation is a significant reduction of those not willing to take the vaccine. At the regional level, the share of the latter reduced almost by half, or by 17%, from 42% in the last edition to 25% in this year's. On the other hand, the pro-vaccine group grew by almost the same margin, or 15% (from 56% in 2020 to 71% this year). Of the latter, 55% are already vaccinated and 16% are willing to take the vaccine.

Considering each economy separately, though each economy has large pro-vaccine majorities, the share of those not willing to take the vaccine is still quite high, up to one-third of survey populations. Kosovo* remains the most pro-vaccine one, where nine out of ten (89%) of those polled have either been already vaccinated (62%) or are willing to do so (27%), as opposed to only less than one in ten (9%) not willing to take the vaccine. North Macedonia is the second most pro-vaccine economy (at 74% versus 24%), while Bosnia and Herzegovina is the last pro-vaccine one, where 59% are either already immunised (44%) or willing to do so (15%), and every third (33%) of them said they are not willing to do so. This economy is also home to the largest undecided group (8%).

Figure 111: Which best describes why you would not take the vaccine for COVID-19?

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



Focusing on those who are not willing to take the vaccine reveals a generally positive trend. At the regional level, the share, on average, of those not willing to undergo immunisation because they worry about side effects of the vaccine has declined by almost one-third, precisely by 18%, from 57% in 2020 to 39% this year. At the same time, a worrisome trend is an increase of those who do not find the vaccine effective against the coronavirus, namely by 8%, from 19% in the previous round to 27% in this year's round. The group of respondents sharing a general anti-vaccine sentiment is also quite big (14%), slightly bigger than a year ago (13%).

North Macedonia has overcome Kosovo* to become the leading economy by the share of respondents who are worried about vaccine's side effects (44%, 13% less than in 2020), while the size of such groups in Albania and Serbia is the smallest (38% of those polled). Serbia also has the biggest share of respondents, compared to other economies, who do not refuse to get vaccinated because they find the vaccine ineffective (32%, a huge 12-point hike from 20% in the previous round). Furthermore, while this group of those polled is the smallest in Albania (20%), in Kosovo* it is bigger than the group of those worried about side effects (29% and 28% of them, respectively). Montenegro has replaced Bosnia and Herzegovina as home to the highest share of those who are against vaccines in general (19%, up from 16% 2020), while Kosovo* remains on the other end of the scale, with those belonging to this category making up only 11% (5% more than in 2020).

CONCLUSIONS AND RECOMMENDATIONS

Findings of this round of the Barometer show a generally more positive trend in overall public sentiment. Despite the unchanged sentiment among populations over the overall present situation, there is increased optimism and solidarity based on the belief that what brings the region together is bigger than what drives it apart. In addition, economies of the Western Balkans remain firmly in favour of more free trade in the region as most people still support strengthening of trade links within the region. Such an optimistic public sentiment should be seen as an opportunity to pursue a more equal and open approach to further political and economic integration in the region and with the EU.

Confidence and optimism in the benefits of EU membership also prevails in the region, solid to vast majorities endorse accession and support more free trade between the region's economies and the EU. Likewise, significant to vast majorities in all economies are aware that the EU is the biggest supporter of the region in overcoming the COVID-19 pandemic. The public has, nevertheless, become more realistic in terms of timing, with less respondents than in the previous edition believing that their economies would integrate in the EU by 2030 the latest. This shows that political elites and institutions in the EU and region's economies, jointly with other relevant actors, need to recalibrate policies for full integration of the region into the EU through a more credible long-term reform project, and implement them more realistically. They should also shape public expectations in the EU and the region accordingly. This could be done in the framework of a reformed enlargement package, as part of the ongoing process over the so-called 'new methodology' for EU enlargement.

Survey results also show that citizens in the region share a more optimistic view of the economic situation and perceived life satisfaction has increased moderately. However, the current economic situation is considered the biggest challenge by the majority of nearly half of respondents, living conditions for more people have worsened and more people are concerned over increasing gap between rich and poor. While wealth gap might have increased in some economies mainly due to the COVID-19 pandemic, it is nevertheless a message for governments and other stakeholders that inequality should consistently be paid attention to and systematically tackled. In other words, socio-economic inequality needs to be tackled not only through post-pandemic economic recovery policies, which are rather temporary, but as cross-cutting structural challenges in all policy areas at all times.

More specifically in the post-COVID socio-economic context, economies are still facing perpetual labour market challenges, with high rates of unemployment being the most detrimental factor. Findings show that four in ten citizens see unemployment as a threat to economic development, compared to almost half of the population who perceive the current economic output as the biggest challenge to their economies. Youth's precarious position in the labour market adds to this problem, with six in ten citizens requiring governmental action to combat unemployment among youth. Though numerous employment policies are in place, they often fail to adequately target the most marginalised groups, including young people, women, and ethnic minorities.

On the other hand, one of the downfalls of affirmative employment policies is lack of consistency. While employment schemes establish and get implemented, sustainability is the key element missing from the equation. Thus, respective governments need to engage more proactively in providing a robust mitigation. One step which can contribute to shaping employment policies to long-term benefit of thus far vulnerable groups is ensuring the representation and inclusivity in policy co-creation and co-management, such as establishing mechanisms of, for instance, structured participation of youth representatives in decision-making processes.

In addition, the fact that the public sector remains the preferred sector of employment for a considerable number of jobseekers shows that labour markets are highly unstable and thus still largely ineffective in producing the level of economic growth needed. Secondly, labour mobility has rather stagnated since the previous round of the Barometer. Thirdly, the pandemic has made virtually everyone fearful of losing jobs, with majorities in all economies concerned by unemployment above anything else and convinced that their respective governments are not doing enough to protect them from losing their jobs. In this context, employment and related policies need to be made much more dynamic and adjusted to rapidly changing needs of labour markets and the very nature of work. They should also be driven by private sector employment and making it more competitive and therefore more attractive than the public sector.

Moreover, given high levels of youth unemployment, improving policies for this purpose and better targeting unemployed young people could also be achieved by enhancing the provision of career advice, job searching and vocational trainings through independent organisations. Providing concessional loans to recent graduates-potential future entrepreneurs could also tackle youth unemployment and boost economic growth in the longer run. A special focus should be given to women with children, people with disabilities and young people from a minority community, among others. Related to the employment and labour market, the increasing push for digitalisation in all economies once again shows that digital competences remain increasingly critical to compete in ever-changing labour markets. However, results of this Barometer have two contradictory tendencies. On the one hand, digital skills are the most required skills in the region. On the other hand, learning such new skills is not perceived an important tool to remain relevant in the labour market and thus large majorities in all economies did not advance their digital skills during the recent one-year period. On Internet use, findings show a trend of stagnation in the ten categories surveyed and a considerable number of people have security and trust issues to use it for economic activities. This shows that governments and other stakeholders in all region's economies need to prioritise and pursue more serious reforms in the area of digital economy.

Yet the momentum for economic growth is significantly impeded by corruption, an opinion also shared by significant majorities across the region. Secondly, trust in institutions is improving only incrementally. Thirdly, citizen's apathy persists in all economies, with significant majorities abstaining from meaningful participation in government decision-making. Even more importantly, all economies have been stagnating in key aspects of rule of law. On the latter, large majorities in all economies distrust their judiciaries and share the belief that law in their economies is not applied and enforced effectively and equally. Large majorities in all economies also think that independent institutions that are critical for democratic governance, including media, are actually not performing their functions independently of political influence. These findings clearly demonstrate the need to tackle such chronic deficiencies that are preconditions to the very functioning of public institutions. Combating corruption should also effectively be among first priorities by governments of all economies and other stakeholders, as it not only erodes trust in public institutions but it also undermines the general well-being of citizens.

Another area with contradictory findings in this round's survey is that of social inclusion. On the one hand, government affirmative measures for marginalised groups such as people with disabilities, displaced persons and refugees, Roma and other minorities are widely supported in all economies. On the other hand, social exclusion remains a challenge for the entire region. Regarding the latter, prejudices towards some groups, especially Roma communities persist, while many people feel looked down on because of their income, simply excluded from their societies or afraid of falling into the poverty trap. Typically, persistence in all economies of prejudices towards Roma communities and the refusal to engage with them in daily lives, especially in critical spheres of socialisation such as at work or in schools, remain stumbling blocks to antidiscrimination policies and to their integration in the respective societies.

Beyond that, although all six Western Balkan economies ratified the Istanbul Convention[13], a treaty signed in May 2011 to prevent and eradicate violence against women, femicide remains a prevailing trend in these societies. Though a decreasing trend, 59% of citizens called on their governments to take immediate action and combat such detrimental phenomenon. An identified problem with tackling violence again women lies within the lack of information on the availability of adequate services for sexual victims. While some services have been established in helping women who are victims of domestic abuse, this is not the case for all economies in the region and these services often are not fully implemented due to lack of sustainable funding. Thus, providing sustainable funding is a prerequisite in order to fully establish and/or implement such infrastructure. Available hotlines and campaigns on increasing women's awareness on the existence of such services should have consistency so victims of domestic violence know they are not alone and seek for help to competent authorities.

Other ongoing reforms and efforts to address pressing needs and challenges, such as those on transport infrastructure and connections in order to address needs for economic development and decarbonisation at the same time, are even more complex. Survey findings show that citizens' satisfaction with the quality of transport infrastructure and connections in the region has not increased since the previous round, with majorities in all economies dissatisfied. This shows the need for reforms and investments in the region to bring more sustainable results more quickly. Likewise, there are no significant improvements in the level of climate awareness among citizens in all economies, with large majorities of populations seeing issues like climate change and pollution as pressing problems. This shows that they share the same extent of needs to improve the situation of the environment across the region.

13 Council of Europe, (2021): *Istanbul Convention- Action against women and domestic violence*, https://www.coe.int/en/web/istanbul-convention/key-facts

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 mid-February to mid-March 2022 in Albania, Bosnia and Herzegovina, Kosovo*, North Macedonia, Montenegro and Serbia.

As a part of 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 the RCC and finalised by Indago.

The Public Opinion Survey questionnaire was composed of a total of 109 questions, as well as the demographic questions (region, gender, age, education, nationality, marital status, household income and self-assessed social status of the respondent).

The questionnaire was originally written in English by the RCC and subsequently translated into related local languages by Indago. The 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 6 (six) 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/national teams' leaders reviewed the entire programmed questionnaire jointly with the interviewers and emphasised some important elements (especially the need to read or not 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 of 6 (six) economies, with the total of 6,029 respondents for the entire Western Balkan 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 to 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: the selection of the sampling points, the selection of addresses, the selection of households and the 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). 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	5.3%
	Dibër	4.5%
	Durrës	9.3%
	Elbasan	10.4%
	Fier	11.2%
	Gjirokastër	2.8%
	Korçë	8.2%
	Kukës	2.7%
	Lezhë	4.6%
	Shkodër	7.5%
	Tiranë	27.1%
	Vlorë	6.5%
Bosnia and Herzegovina	Federacija Bosne i Hercegovine	62.1%
	Republika Srpska	35.5%
	Brčko District	2.4%
Kosovo*	Ferizaj / Uroševac	10.5%
	Gjilan / Gnjilane	10.6%
	Peja / Peć	10.1%
	Mitrovica	11.0%
	Prizren	18.8%
	Gjakovë / Đakovica	11.4%
	Prishtinë / Pristina	27.7%
North Macedonia	Vardar	7.9%
	East	9.3%
	Southwest	10.5%
	Sourtheast	8.6%
	Pealgonia	12.4%
	Polog	13.9%
	Northeast	8.4%
	Skopje	29.0%

Montenegro	North region	28.3%
	Central region	47.2%
	South region	24.5%
Serbia	Belgrade	23.2%
	South and East Serbia	21.8%
	Central and West Serbia	28.1%
	Vojvodina	26.8%

Figure 112: Sample structure by gender

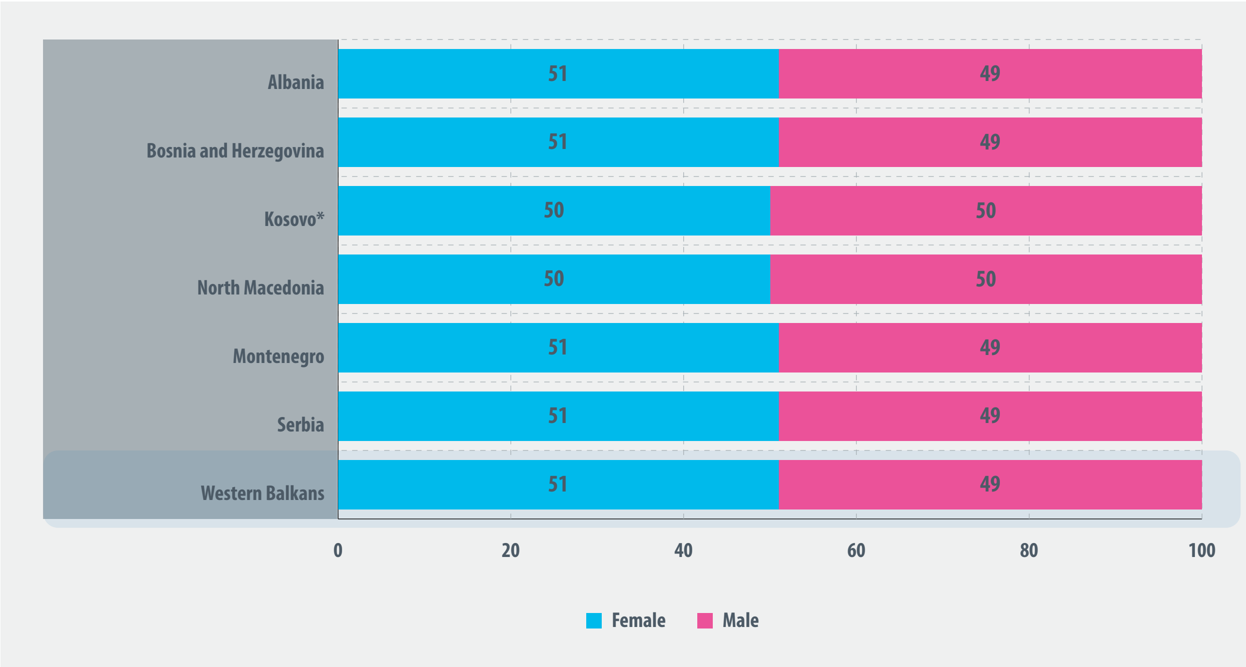


Figure 113: Sample structure by age

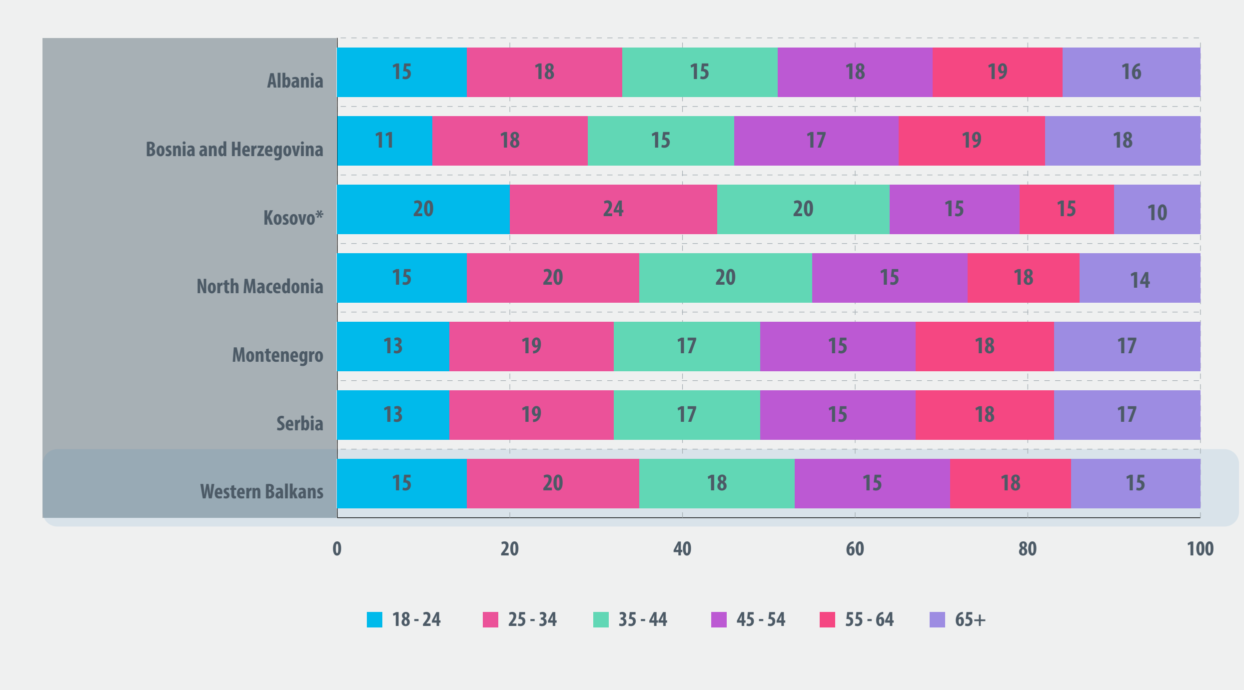


Figure 114: Sample structure by education

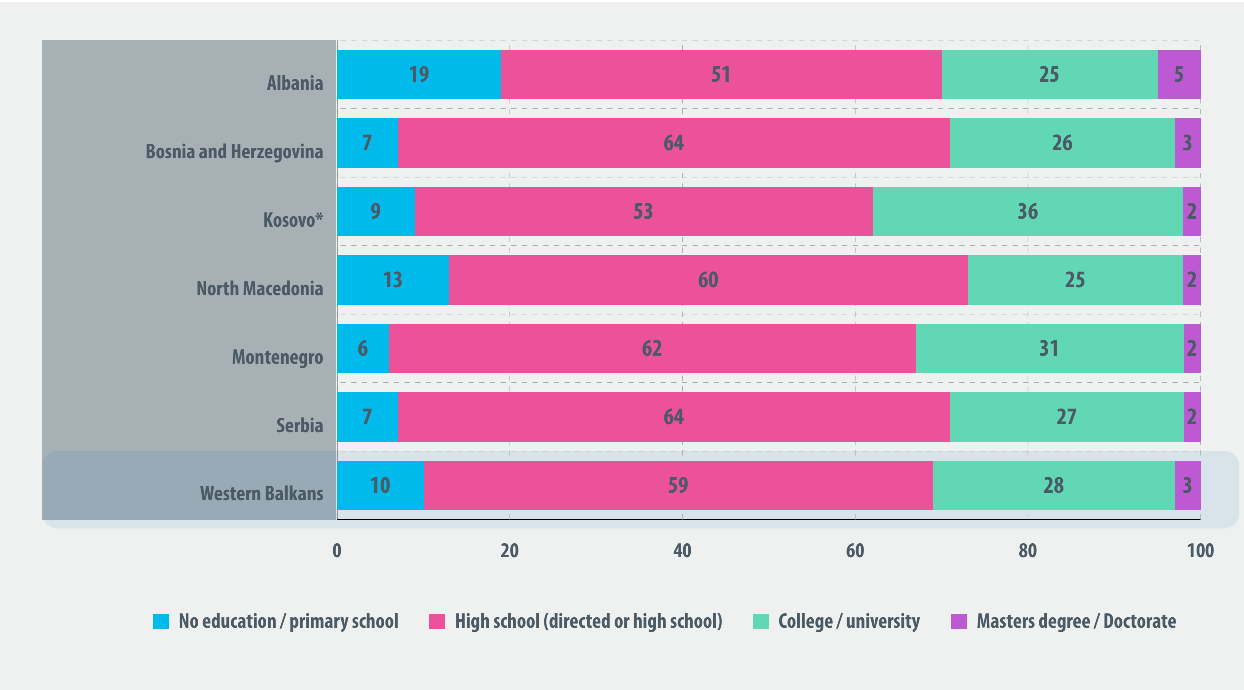


Figure 115: Sample structure by marital status

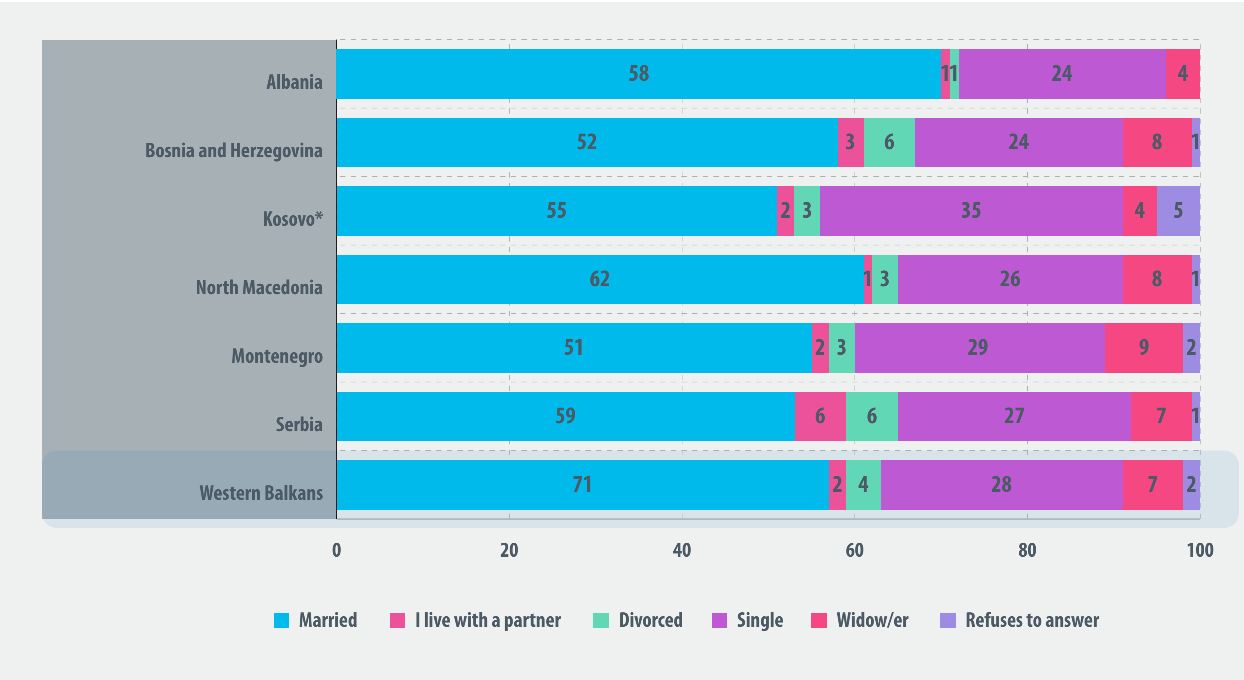
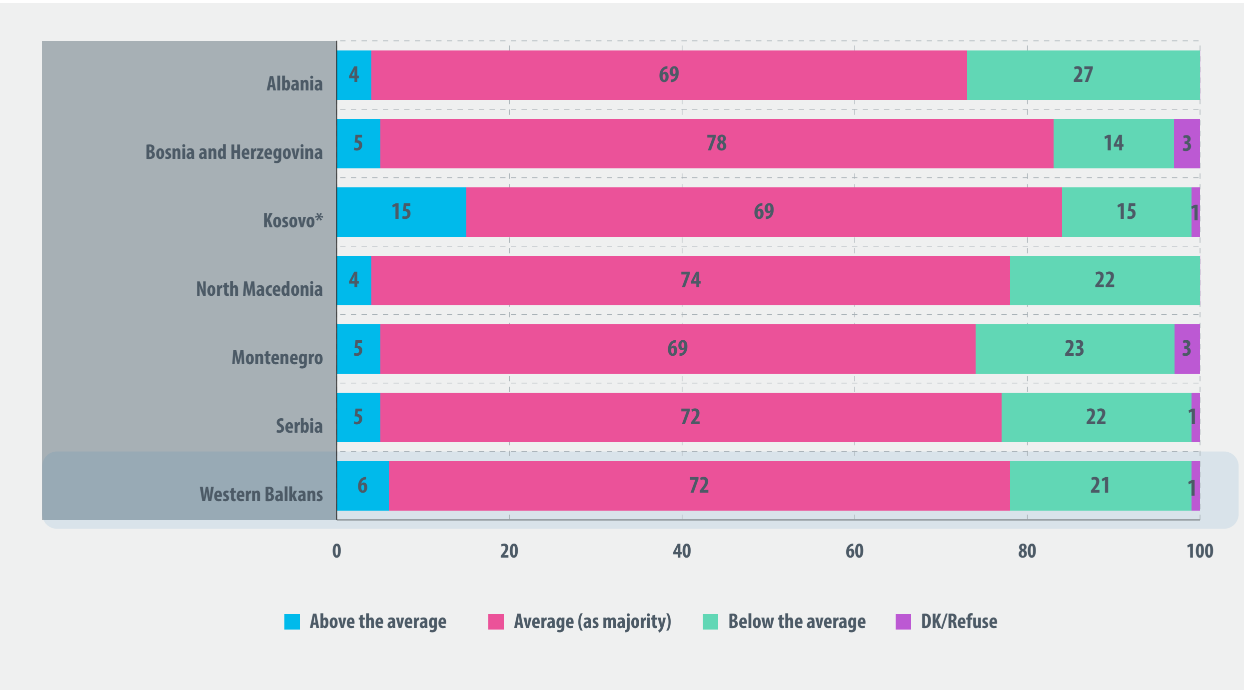


Figure 116: Sample structure by social status (self-estimation)



SAMPLE STRUCTURE

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