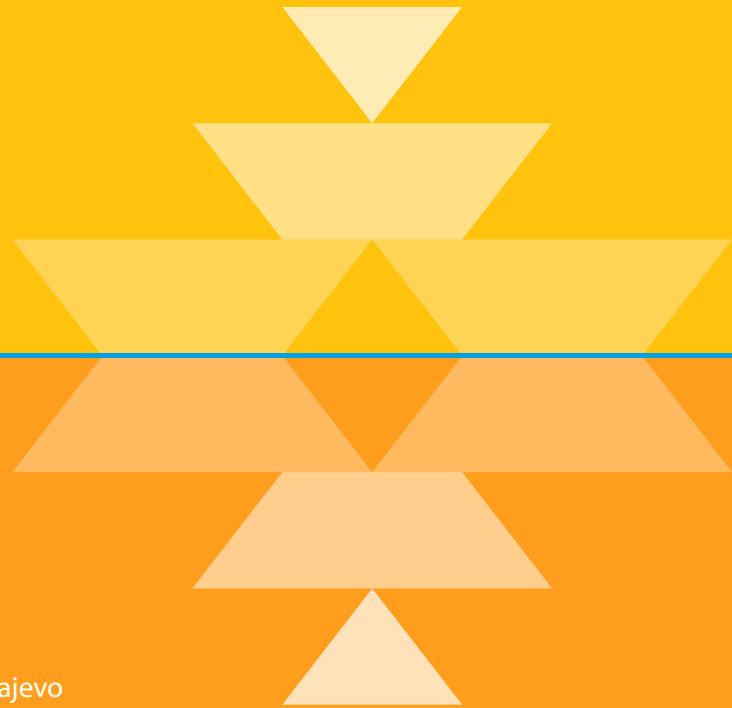


BALKAN BAROMETER

2024 PUBLIC
OPINION

good. better. regional.



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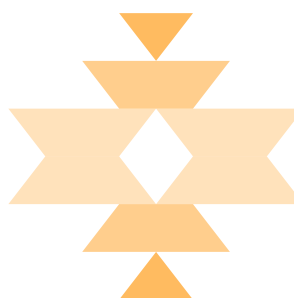
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LIST OF ABBREVIATIONS

BBPO	Balkan Barometer Public Opinion
BPSI	Balkan Public Sentiment Index
CSO	Civil Society Organisation
DK/DA	Do not Know/ Did not Answer (as in survey responses)
EC	European Commission
EU	European Union
GDP	Gross Domestic Product
PM	Prime Minister
RCC	Regional Cooperation Council
RTK	Radio Television of Kosovo*
SAI	Supreme Audit Institution
SPAK	Specialised Structure against Corruption and Organised Crime
USA	United States of America
WB6	Western Balkans Six



*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



FOREWORD

It is with great satisfaction that the Regional Cooperation Council (RCC) introduces the Balkan Barometer 2024 Public Opinion—the tenth jubilee edition of the annual survey that examines region’s opinions and perspectives across the Western Balkans Six (WB6). Since its inception in 2014, the Balkan Barometer has evolved into a trusted source for tracking socio-economic trends, supporting data-driven policy-making, and enabling informed decisions throughout the region.

This tenth edition also offers a decade-long insight into the perceptions of the importance of regional cooperation, sentiments over EU integration, and opinion of the public on the timing of joining the EU, and others.

This year’s findings underscore both progress and ongoing challenges. Trust in regional cooperation has reached a record high of 82%, demonstrating the growing belief in the importance of collective efforts for political, economic, and social stability. However, economic concerns persist, with rising prices and inflation now being the primary concern for 64% of respondents, surpassing worries about the overall economic situation and corruption.

EU membership remains a key strategic priority for the region, with 54% of respondents seeing EU integration as beneficial to their economies. However, the declining trend in public support suggests growing fatigue towards the EU integration process. Meanwhile, digital transformation continues to be seen as a critical driver of future competitiveness, with around 80% of respondents acknowledging the importance of digital skills for workforce success.

Despite these positive trends, the 2024 Barometer also highlights areas for improvement, such as gender equality. Notably, 52% of respondents believe there is no gender pay gap, reflecting a disconnection between perceptions and reality. Addressing such discrepancies is vital for achieving balanced socio-economic development across the region.

We hope that this year’s Balkan Barometer serves as a valuable tool for understanding the evolving expectations and priorities of our citizens, and helps guide regional initiatives towards sustainable growth and integration.

The Balkan Barometer remains an indispensable tool for understanding the shifts that define the WB6 trajectory and contributes to informed decision-making across the region.



INTRODUCTION

The 2024 Balkan Barometer surveys were conducted between March and early April 2024 in Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, North Macedonia and Serbia. The Public Opinion survey posed 48 questions to 6000 respondents, and the Business Opinion survey presented 40 questions to 1200 business owners, managers or executives. As in the previous editions, the answers of survey respondents have been systemised, analysed, and presented in the two reports – Public Opinion Survey and Business Opinion Survey.

The 10th edition of the Balkan Barometer arrives at a particularly challenging period for the region, Europe, and the world. Following the pandemic, which significantly impacted economies and citizens' lives, the WB6, along with the rest of the world, is grappling with the repercussions of the war in Ukraine that began in 2022. Additionally, the region faces inflationary pressures, energy crises, and political instability, further complicating recovery efforts. This edition of the Balkan Barometer aims to explore citizens' perceptions across a wide range of factors that influence their daily lives amidst these ongoing challenges.



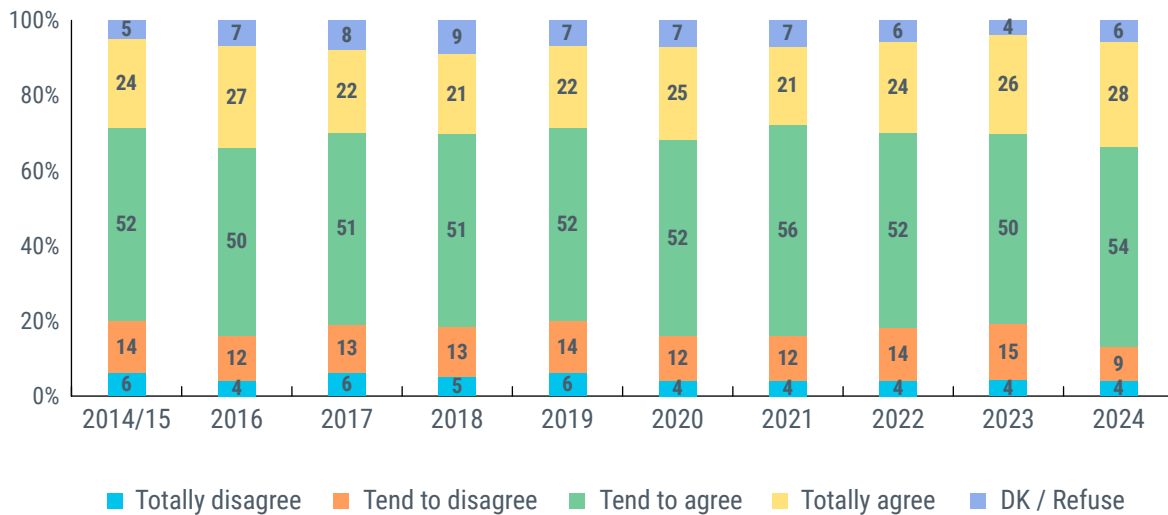
Key Findings - 2024

Support to regional cooperation at all times high

Trust in regional cooperation in 2024 is at an all time high since the launch of Balkan Barometer in 2015, standing at 82%. This underscores a growing consensus on the transformative potential of collaborative efforts in the Western Balkans Six and suggests a robust foundation for continued collaboration. Trust in the proposition that regional cooperation can contribute to the wellbeing and security of the Western Balkans Six people is fairly uniform across the region, as seen in the graph below.

FIGURE 1

Regional cooperation can contribute to the political and economic situation, wellbeing of Western Balkan people and security situation



According to this latest Barometer, nearly four out of five respondents in the Western Balkans Six prioritise what brings them together rather than what divides them, with only about one out of ten holding the opposite view. This marks a significant increase in regional unity compared to the 2023 BBPO, highlighting strong support for collaborative efforts.

Nationalist politics named as top determinant obstructing regional cooperation

Responses to the 2024 survey indicate that people believe nationalist politics across the Western Balkan economies is hampering regional cooperation, significantly more than a lack of trust due to history, prejudices or ethnic divisions. Nearly half of citizens identified that nationalist politics was hampering regional cooperation, followed by over a third mentioning lack of trust due to history and over a quarter answering prejudices.



FIGURE 2

What brings Western Balkan citizens together is more important than what separates them

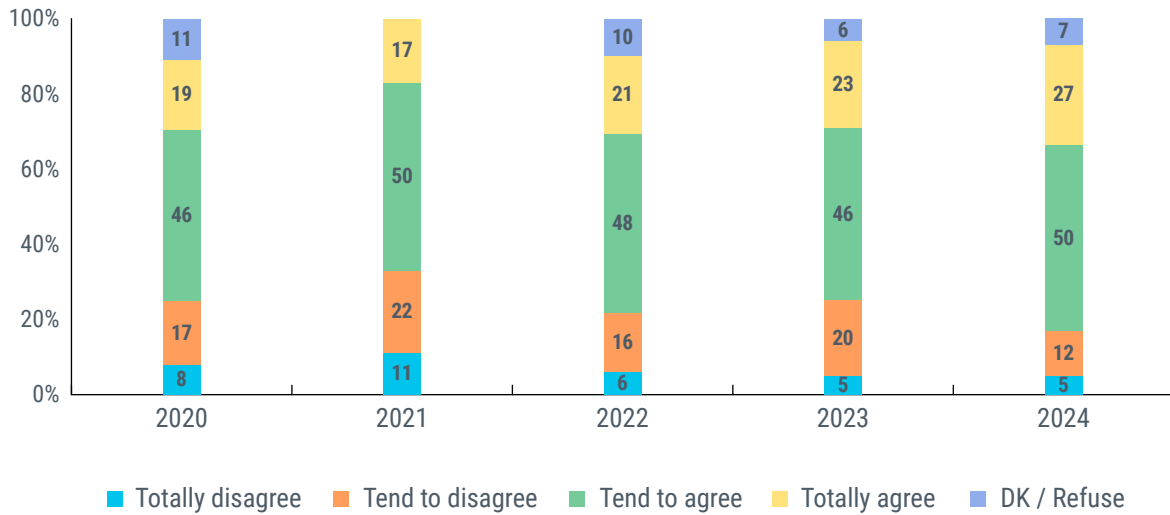
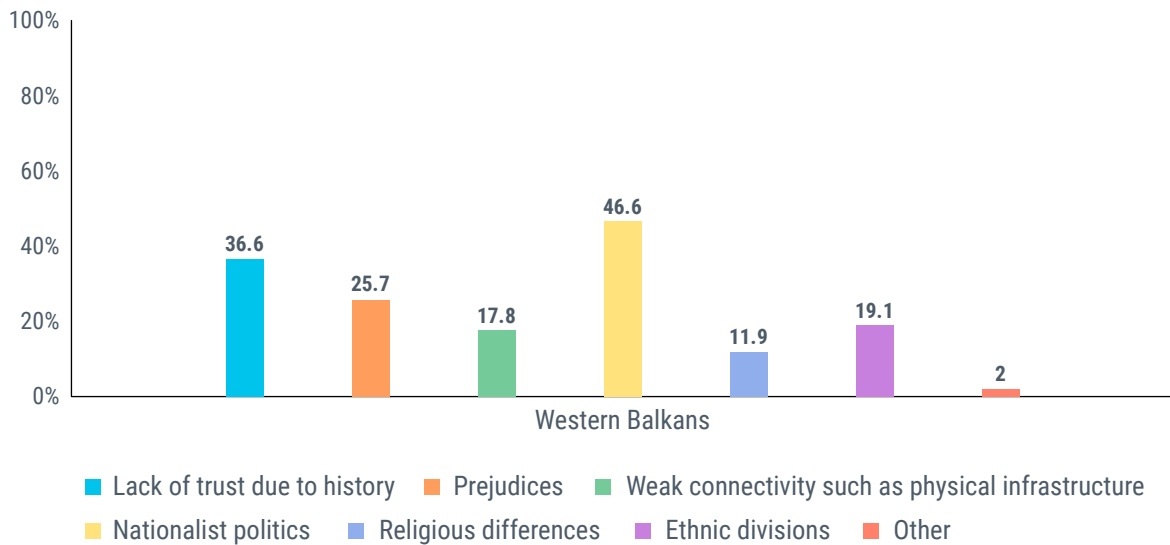


FIGURE 3

In your opinion, what hampers regional cooperation between Western Balkan economies?



Resisting the EU integration fatigue

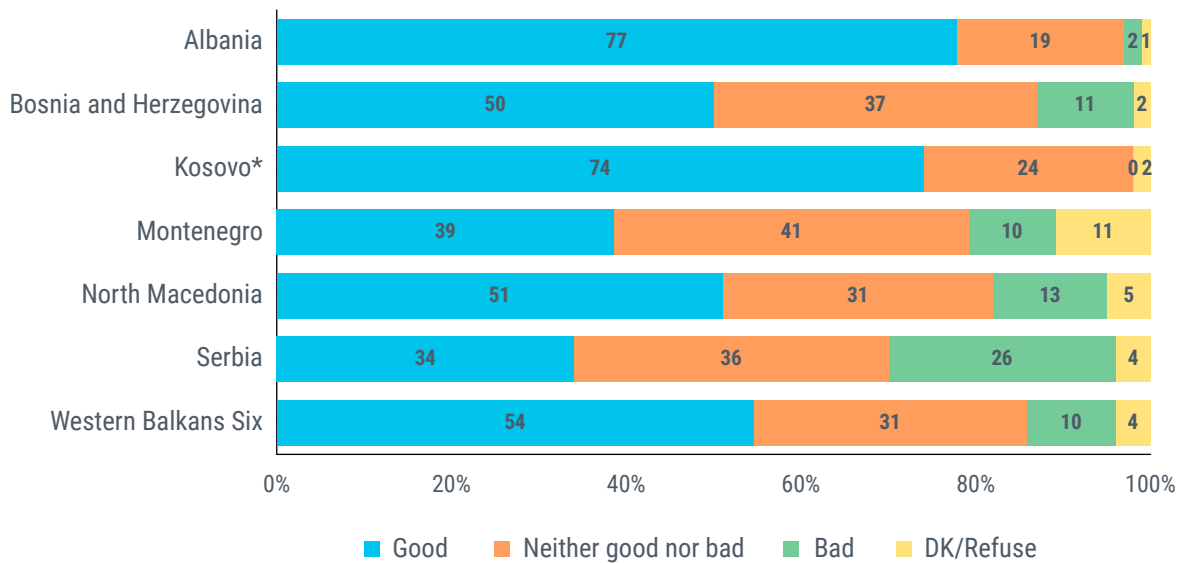
The majority of Western Balkan citizens believe in the positive impact of EU integration on their economy, but there is some variation in the intensity of this belief across the region.

54% of respondents in the Western Balkans believe EU membership would be a good thing for their economy, while 10% remain sceptical about their economy’s prospects for joining the EU. For the second year in a row, there is a decline in the belief that EU membership would be beneficial for their economy, this year by 8 percentage points less than in 2021.



FIGURE 4

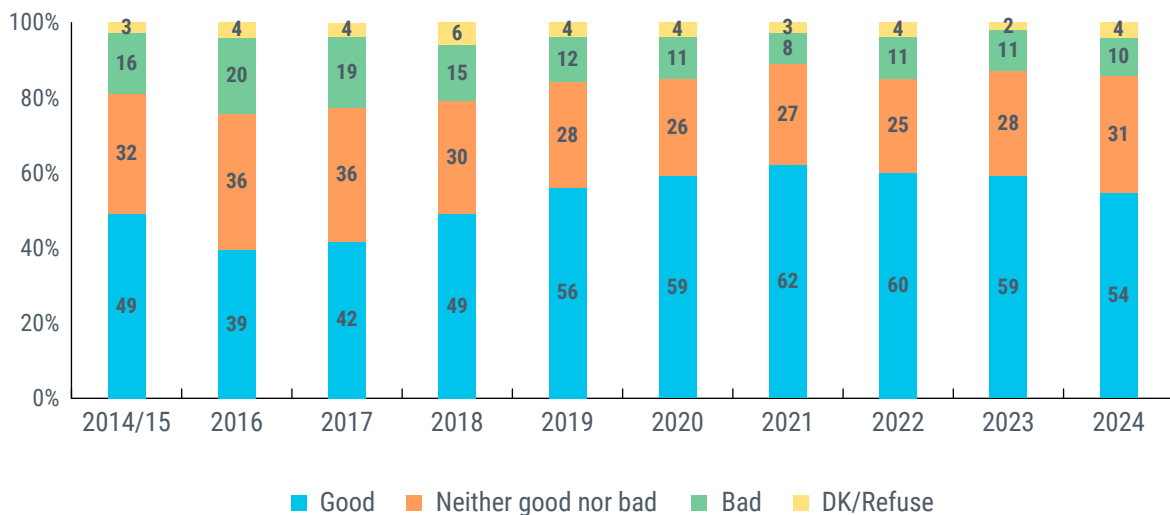
Do you think that EU membership would be good, neither good nor bad, or bad?



The trend below reveals increasing support for EU membership in the WB6 up until 2021, with the percentage of positive views rising from 49% in 2014/2015 to 62% in 2021. However, this has since declined to 54% in 2024. Despite challenges such as slow progress in the accession process, reform fatigue, uncertainty about membership prospects, complex geopolitical dynamics, and significant economic and social hurdles, positive sentiment towards EU membership remains strong. Citizens in the region continue to see EU enlargement as a way to address long-standing issues and achieve stability, prosperity, and closer integration with Europe. Meanwhile, neutral responses have remained relatively stable, and opposition has slightly decreased. The consistently low “don’t know” responses indicate that most people have a clear opinion on the matter.

FIGURE 5

Support for EU Membership in the Western Balkans

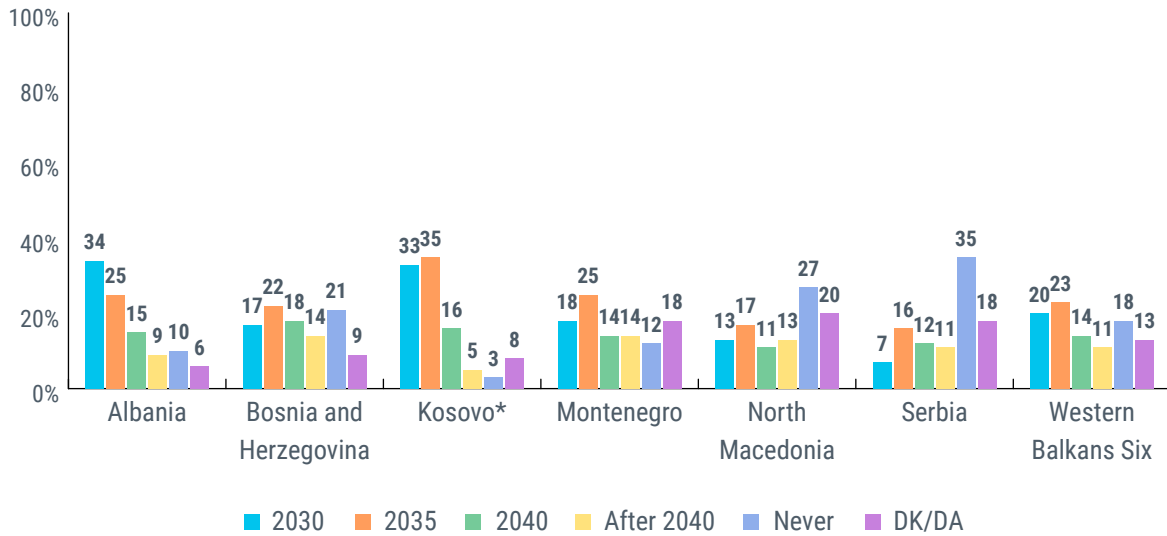




At the same time, citizens remain hopeful that EU integration will happen within the upcoming decade, but there are large variations across the Western Balkans, including significant pockets of scepticism about the outcome of the accession process in some of the economies. About 20% of Western Balkan citizens envision joining the EU by 2030, while 23% expect it between 2030 and 2035. However, fewer people (18%) believe their economy will never join the EU, a decrease of 10% points from 2022.

FIGURE 6

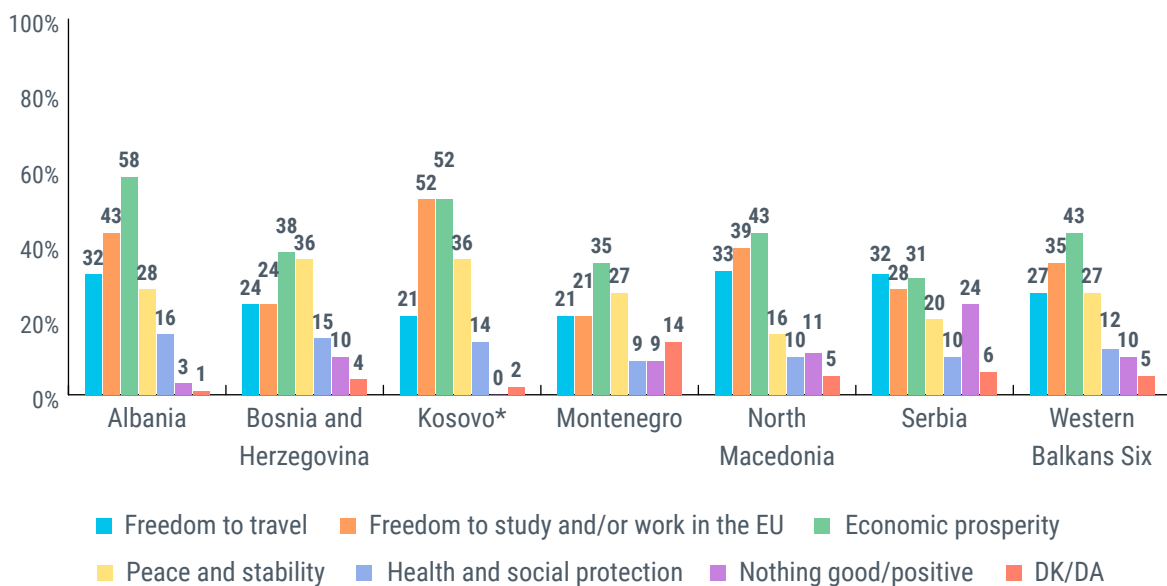
When do you expect the EU accession to happen?



Economic prosperity and freedom to study/work in the EU are the top two expectations from EU membership, with 43% and 35% of respondents claiming so, respectively, whilst freedom to travel and peace and stability rank equal with 27% of respondents.

FIGURE 7

What would EU membership mean to you personally?

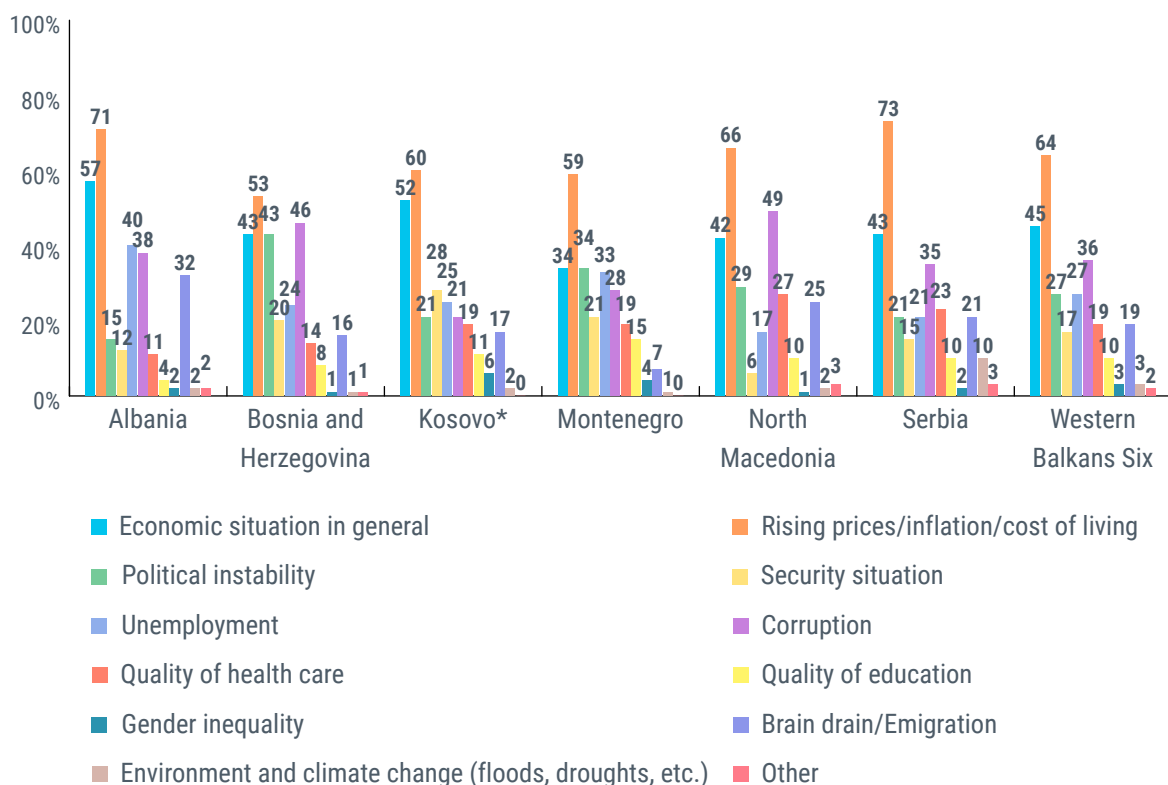


Rising Prices and Inflation Overtake Economic Situation as Top Concern

Over the past 10 years top two concerns for the Western Balkan citizens were unemployment and lately economic situation. This year, for the first time, inflation/ rising prices takes over the top spot, with 64% of respondents claiming it worries them the most. Also for the first time a worry over corruption (36%), with the highest score in the past 10 years (and 9% higher than last year), is greater than the one over unemployment (27%).

Although to a lesser extent compared to the 2023 Barometer results, the brain drain remains a concern in the region (19%). Respondents in the Western Balkans exhibit relatively little concern with the quality of education and the environment/global warming, two areas where the region performs relatively poorly in international comparisons.

FIGURE 8 What do you think are the most important problems facing your economy?



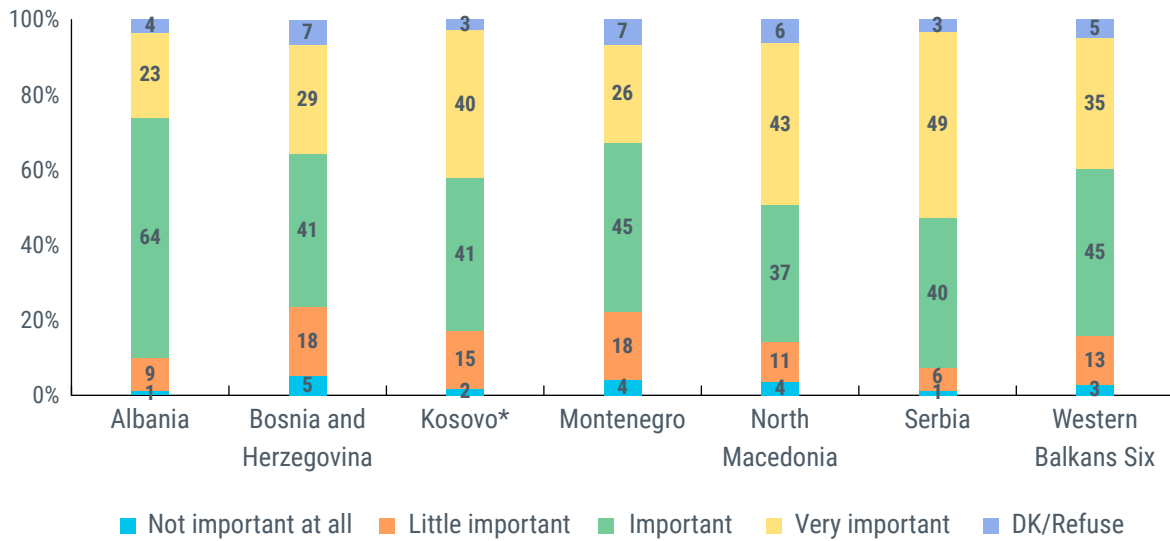
Digital Skills Connected to Success in Today’s Workforce

The Western Balkans has embraced new digital tools. There is a strong recognition of the value of digital skills for workforce success, with around four out of five respondents acknowledging their significance. Respondents across the region place a high value on digital skills to succeed in today’s workforce, with approximately 80% recognising the significant value of digital skills, while only about 16% do not see their importance.



FIGURE 9

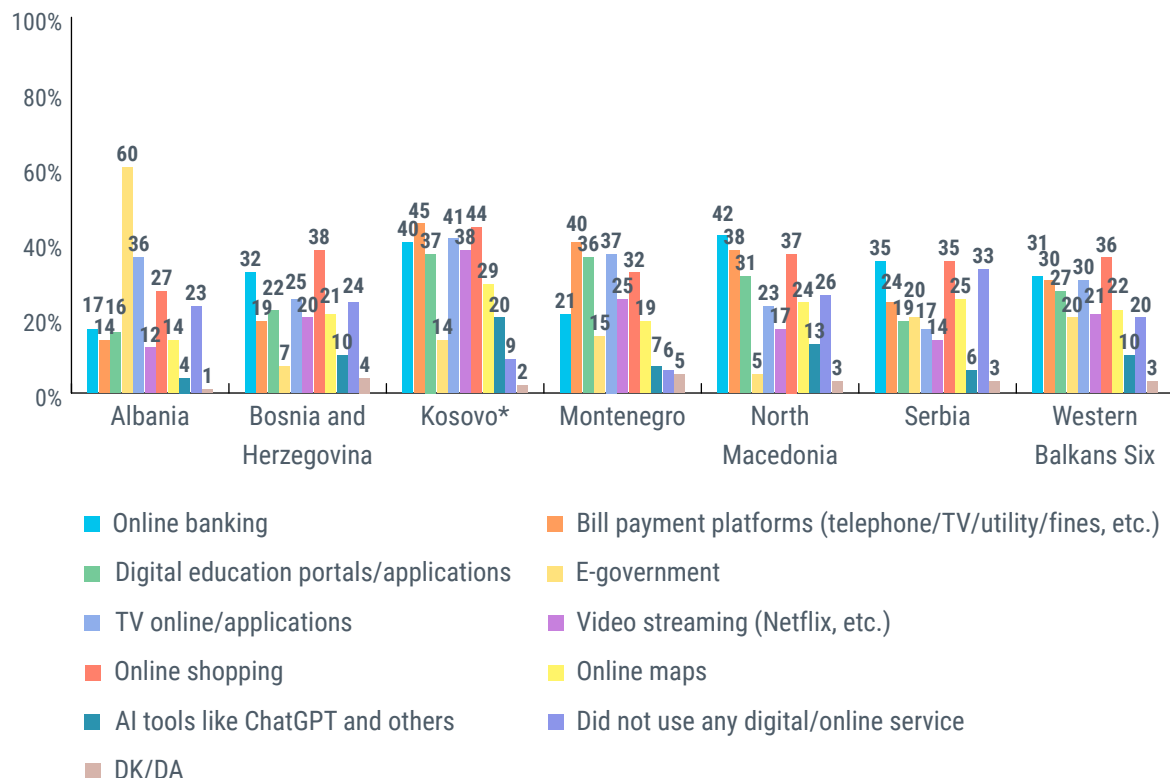
Would you say that digital skills are very important, important, little important or not important at all for success in today's workforce?



At the same time, only 10% of respondents said they were using AI tools in the past 12 months. Digital/online services in the Western Balkans are mostly used for shopping (36%), banking (31%), bill payment (30%), TV apps (30%), education (27%), etc., while 20% of respondents said they did not use such services at all.

FIGURE 10

Which digital/online services have you used in the last 12 months?



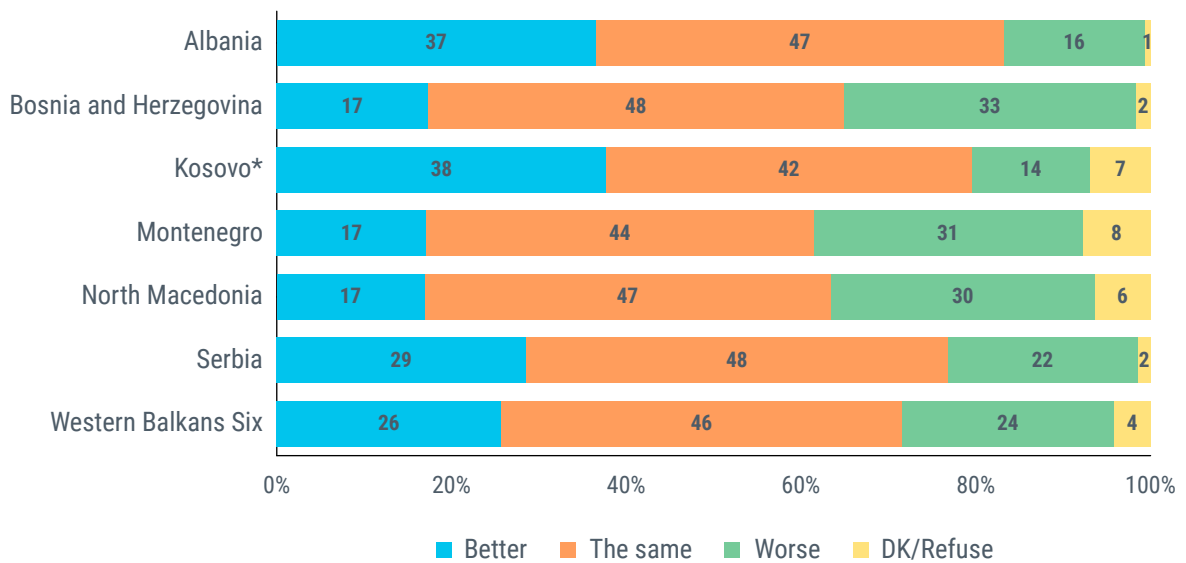


Dwindling Optimism for the Economic Situation

The optimism of Western Balkans Six citizens over the improvement of the situation in their economies is dwindling. There is a noticeable change compared to 2023, as there is 5 percentage point less people expecting a better situation and 5% of them expecting a worse situation. A bit less than a half, 46%, believes everything will remain the same.

FIGURE 11

What are your expectations for your economy for the next 12 months? Do you think that the situation will be better, worse or the same?



Political parties still the least trusted, but trust in judiciary and police is rising in the Western Balkans Six

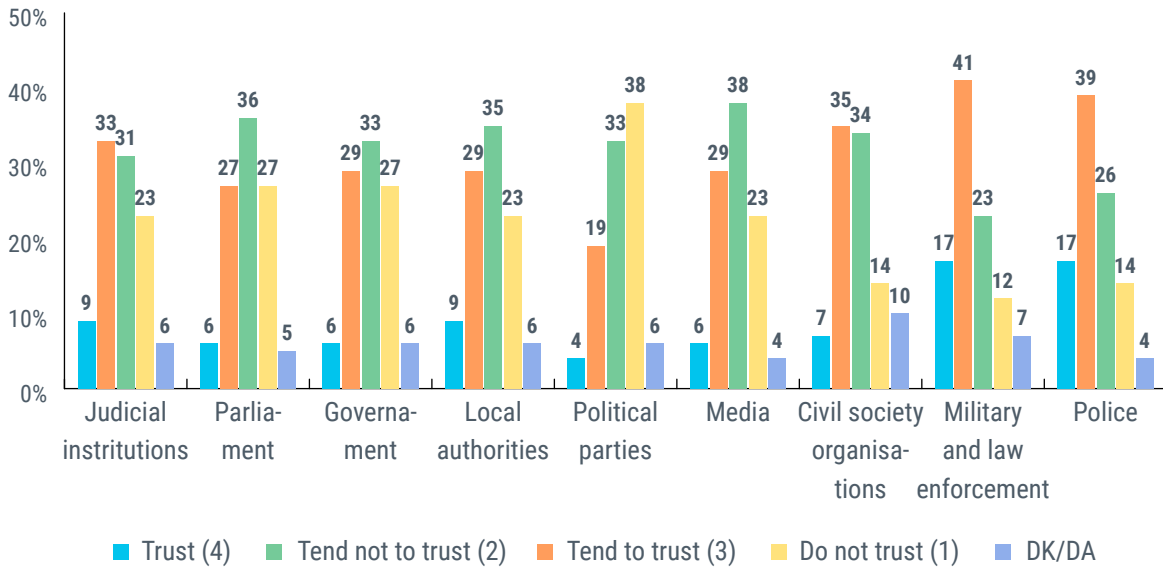
Distrust in political parties remains the highest amongst the Western Balkans Six with 74% (1% less than last year), closely followed by parliaments (64%) and media (58%).

However, there is a notable increase in trust in judicial institutions (42%) and police (56%) compared to 2023 (34% and 45% respectively), indicating some shifting of perceptions. The increased trust in judicial institutions can be attributed to the judicial reforms and anti-corruption measures in the Western Balkans Six.



FIGURE 12

How much trust do you have in the following institutions?

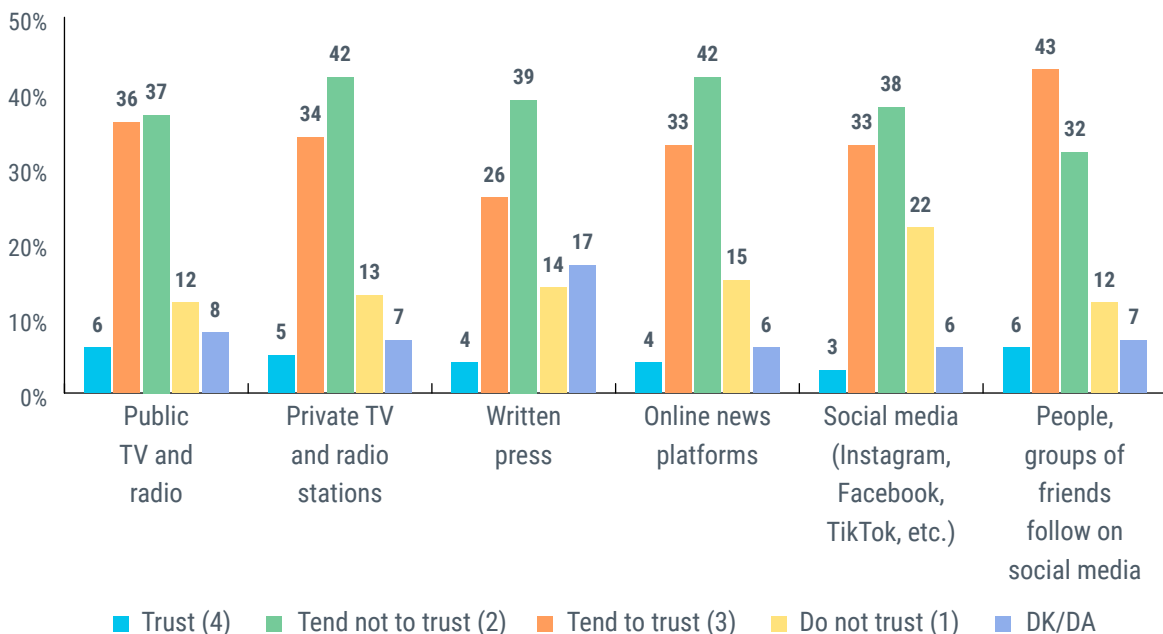


Trust in social media contradictory

The people in the Western Balkans Six trust the least the reliability of information coming from social media, with 60%. However, at the same time people express the biggest trust towards people, groups and friends they follow on social media (45%), the same as towards the public TV and radio. These sources are amongst the least distrusted, with 42%.

FIGURE 13

How much trust and reliability of information do you have in the following sources?



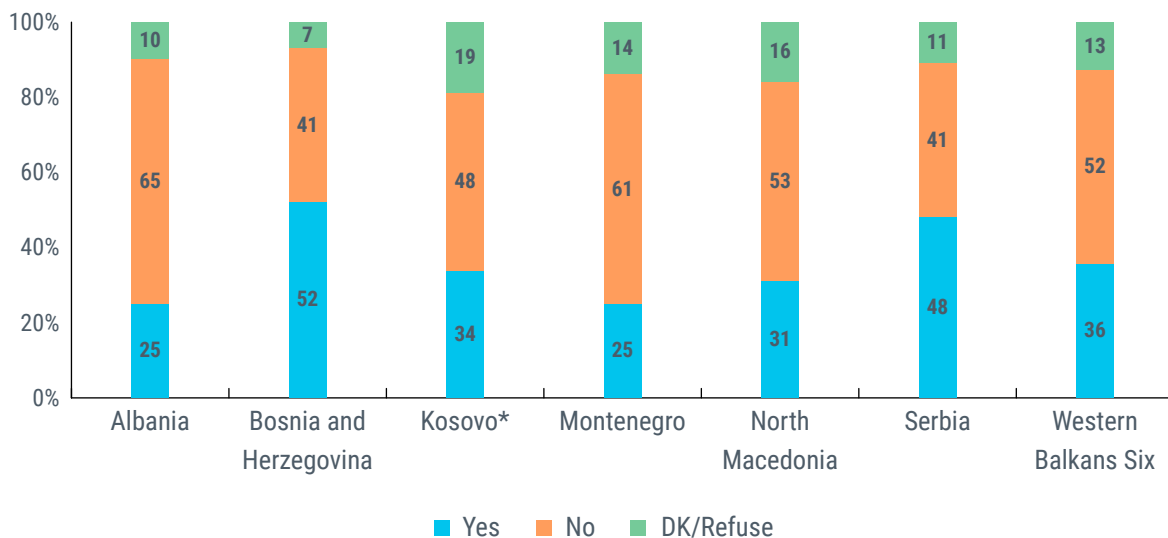


Data reveal blindness towards the gender pay gap

The inclusion of a question about the gender pay gap in the 2024 Balkan Barometer Public Opinion survey revealed surprising results. Despite evidence of a gender pay gap in the region of some 16% as suggested by a research from 2023¹, 52% of respondents considered there was no gender pay gap, while only 36% acknowledged its existence. Amongst women, 45% denied the existence of a gender pay gap, with 43% affirming it. The only exceptions were Bosnia and Herzegovina and Serbia, where a majority of women acknowledged the presence of a gender pay gap. These findings suggest a significant gap between the perceived and actual realities of gender pay disparities, potentially due to factors such as lack of awareness, social and cultural norms, or differences in personal experiences and perceptions of fairness in the workplace.

FIGURE 14

Do you believe there is gender pay gap in your economy?

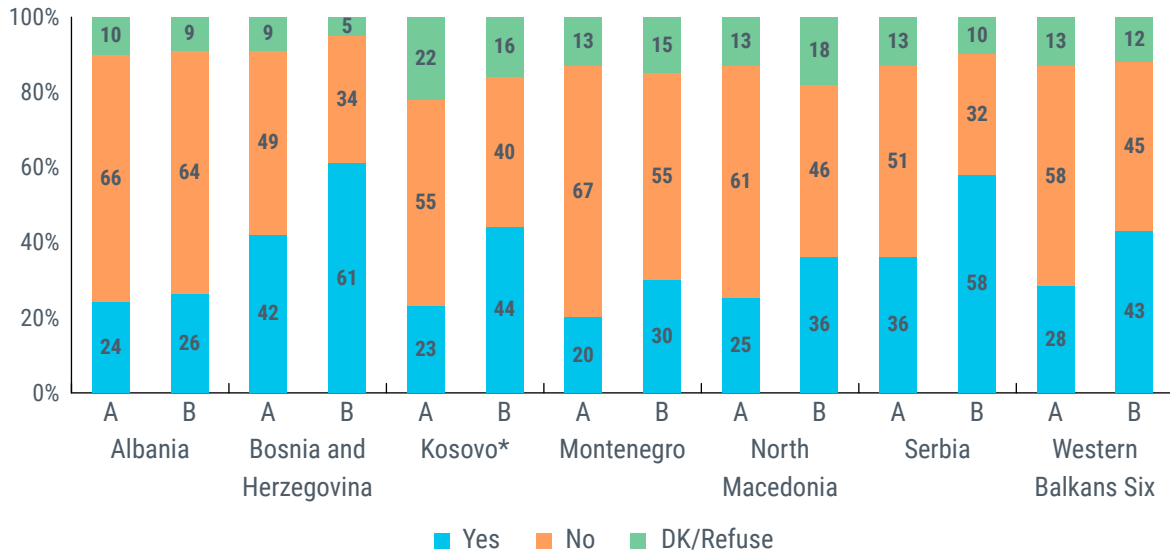


¹ Gender Pay Gap in the Western Balkans: Why Do Women Earn Less Than Men?, January 2023, In book: Gender Competent Public Law and Policies (pp.69-90), Authors: Nikola Ilić, University of Belgrade Faculty of Law



FIGURE 15

Perceptions on gender pay gap, by gender
Gender Analyses: A. Male; B. Female



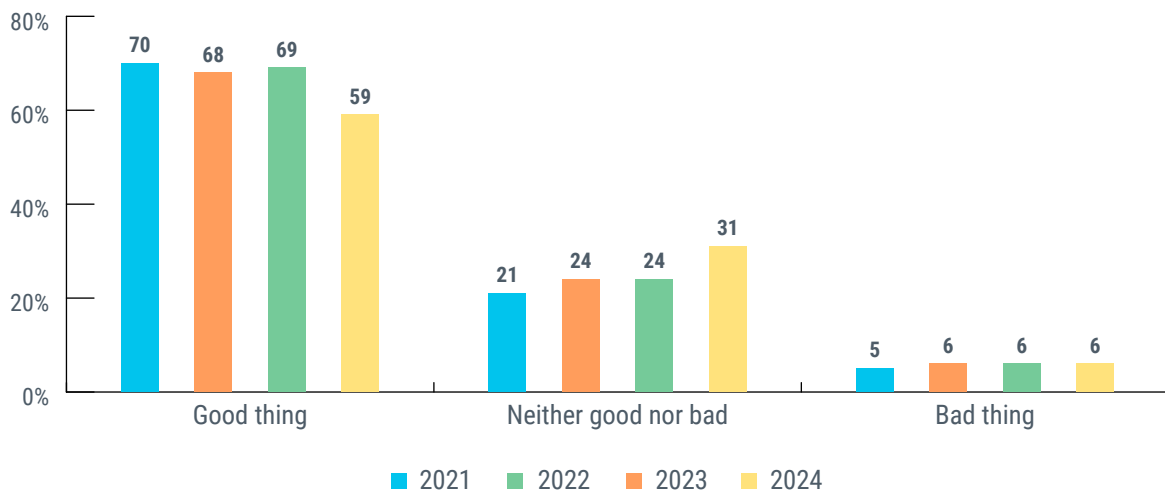
Zooming in on Youth Perceptions

Youth Growing Uncertain About Economic Impact of Membership

Youth opinions on the impact of EU membership on the economy have shown some interesting shifts over the past four years. While a majority still believes that joining the EU would be a good thing (59%), in 2024, this positive sentiment has slightly declined in favour of neutrality. More young people are now uncertain or neutral about the benefits, with a very small but consistent group seeing EU membership as negative.

FIGURE 16

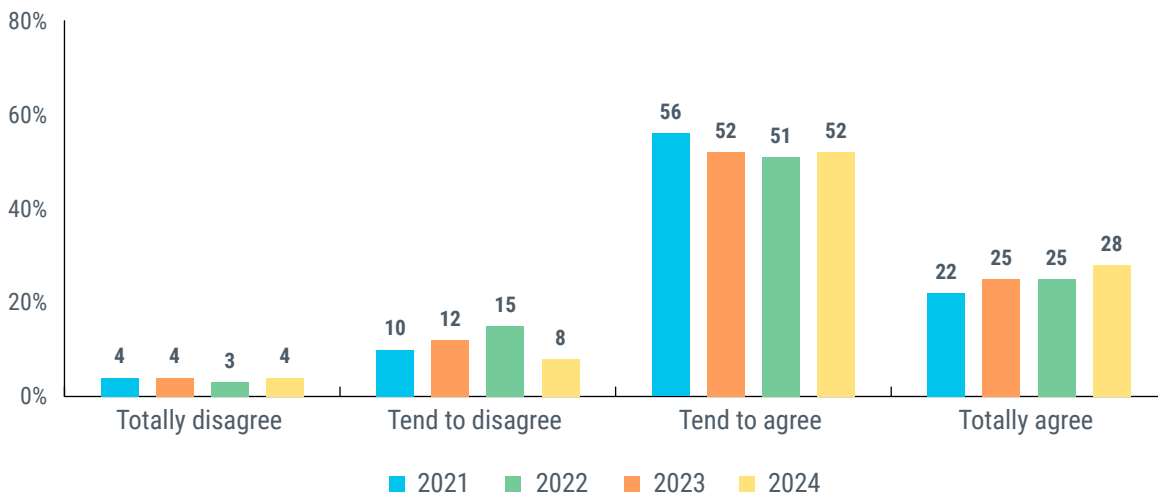
YOUTH OPINION: Do you think that EU membership would be a good thing, a bad thing, or neither good nor bad for economy?





Since 2021, the trend has revealed steady opinion of the youth in the power of enhanced regional cooperation, peaking in 2024 with 80% of youth tending to agree or fully agree that regional cooperation is necessary if economic, political or security situation is to improve.

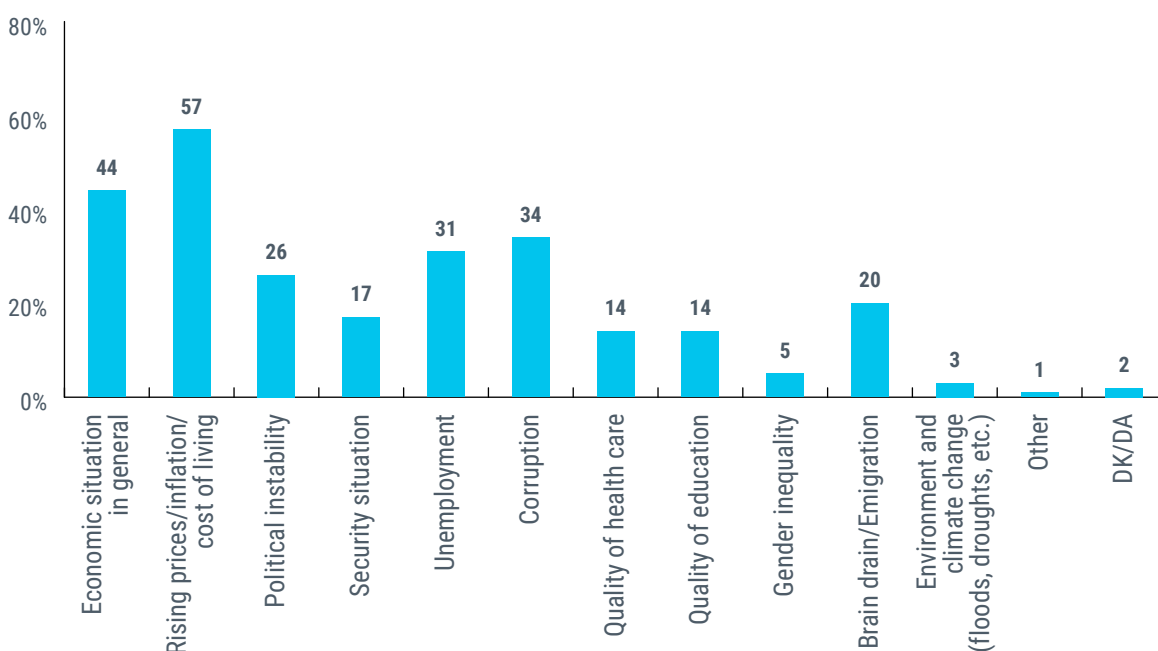
FIGURE 17 Do you agree that regional cooperation can contribute to the political, economic or security situation of ECONOMY?



Corruption worries young people more than unemployment

Similar to other age groups in the survey, 57% of surveyed youth has ranked the rising prices/inflation and cost of living the first amongst problems facing their economy. Economic situation in general is ranked the second and corruption third. For the first time in almost a decade, unemployment was not amongst the top three concerns for the youth, as it declined in the region.

FIGURE 18 YOUTH OPINION 2024: What do you think are the 3 (three) most important problems facing economy?





REGIONAL OVERVIEW

Economic growth in the Western Balkans Six slowed in 2023 with the rate falling from 3.4 percent in 2022 to 2.6 percent in 2023, though this decline was much smaller than that experienced in the EU. By the end of 2023, real GDP in all the Western Balkans Six economies had surpassed their pre-pandemic levels. The initial post-pandemic recovery displayed strong duality with the more services-dependent economies in the WB6 (Albania, Kosovo* and Montenegro) benefitting from the recovery in the demand for tourism and international travel, whilst the more manufacturing-orientated economies (Bosnia and Herzegovina, North Macedonia and Serbia) were constrained by the slowdown in the EU (Table 1).

Table 1. Real GDP Growth in the Western Balkans Six 2020 – 2024 (percent)

	2020	2021	2022	2023e	2024f
Albania	-3.3	8.9	4.9	3.3	3.3
Bosnia and Herzegovina	-3.0	7.4	4.2	1.9	2.6
Kosovo*	-5.3	10.7	4.3	3.1	3.7
North Macedonia	-4.7	4.5	2.2	1.0	2.5
Montenegro	-15.3	13.0	6.4	6.0	3.4
Serbia	-0.9	7.7	2.5	2.5	3.5
Western Balkans Six	-3.0	7.9	3.4	2.6	3.2

e = estimated, f = forecast

Source: World Bank Group Western Balkans Regular Economic Report No. 25, Spring 2024.

The inflationary spike associated with the continuing Russian invasion of Ukraine caused a rise in the inflation rate in the WB6 to 14.3 percent in January 2023 (Table 2). This rate fell gradually in the following twelve months to reach a rate of 5.1 percent in December 2023. However, there was some significant variation across economies in the slowdown in inflation, with the rates in December 2023 varying from 2.2 percent in Bosnia and Herzegovina to 7.6 percent in Serbia. The region exhibited some additional degree of fiscal consolidation in 2023, with the estimated average fiscal deficit falling to 1.5 percent of GDP (Table 2). Notably, Montenegro achieved a fiscal surplus in 2023, whilst Bosnia and Herzegovina was the only economy in the region with a rising fiscal deficit as a percentage of GDP. Overall, capital expenditure as a percentage of GDP in the WB6 declined in 2023 (Table 2), though modest increases were recorded in Bosnia and Herzegovina, Kosovo* and North Macedonia.

The WB6 achieved a significant improvement in their external position in 2023 (Table 2). The current account deficit fell to a historic low of 4.9 percent of GDP, largely driven by a fall in the volume and value of imports. Serbia and North Macedonia achieved the most significant improvements, though Bosnia and Herzegovina's deficit worsened. Remittances to the WB6 rose in 2023, though as a percent of GDP they fell to 6.5. At the regional level, the current account deficit was wholly financed by



net foreign direct investment (5.4 percent of GDP in 2023). Taken together most economies in the region were able to increase their foreign exchange reserves in 2023.

The above developments were associated with improvements in labour market performance in the region in 2023. In all economies except North Macedonia, employment levels were above their pre-pandemic levels. The participation rate in the WB6 rose to 54 percent. Notwithstanding the decline in the populations in Bosnia and Herzegovina, Kosovo*, North Macedonia and Serbia, reflecting continuing net emigration, the aggregate employment rate for the Western Balkans Six (age 15 and above) reached a new peak in 2023 of 48.1 percent whilst the unemployment rate fell in 2023 in all WB6 economies to 10.9 percent. Youth unemployment also declined in 2023 to 25.5 percent, though it remained at nearly twice the EU average rate. Whilst gender gaps in the labour market remained large in the WB6, rising women's participation in 2023 was a key contributor to the region's rising total hour worked. Real wages increased in 2023, though in all economies but Kosovo* average wage growth exceeded productivity growth. The slow productivity growth reflects in part the low quality of education and training systems in the WB6 as evidenced by the region's poor performance in international assessments of youth's knowledge and skills, but also other factors like technological transfer. Overall, poverty declined in the region in 2023, though at a slower speed than pre-pandemic, partly due to large increases in the prices of food and energy.

Table 2. Selected Economic Indicators for Western Balkans Six 2020 – 2024 (percent)

		2020	2021	2022	2023e	2024f
Real GDP growth components						
	Consumption	-1.1	4.8	3.1	1.7	2.8
	Investment	-1.6	2.1	1.3	-0.8	1.3
	Net Exports	-0.3	-0.4	-1.8	1.7	-1.0
Consumer Price Inflation		1.0	3.2	11.8	9.0	3.9
Current Account Balance		-8.6	-5.8	-7.8	-4.9	-5.5
Foreign Direct Investment		5.3	5.9	6.9	5.4	5.3
Fiscal Balance		-7.9	-3.0	-2.7	-1.5	-2.7

e = estimated, f = forecast

Source: World Bank Group *Western Balkans Regular Economic Report No. 25, Spring 2024.*

In summary, during 2023 the region's economies continued their recovery towards pre-pandemic trends. However, with persisting inflationary pressures and forecast growth rates of between 2.5 and 3.7 percent in 2024, only slow convergence with EU income levels is likely. When measured in purchasing power parity, GDP per capita in the WB6 remains at only 40 percent of the EU average. Variations in growth rates amongst the WB6 in part reflect different performances in external trade and differing degrees of success in stimulating domestic and foreign direct investment. Hence the importance of successfully implementing the EU's Growth Plan for the Western Balkans Six. The Plan provides resources for critical infrastructure investments and structural reforms to assist improved integration with the single European market.



BALKAN PUBLIC SENTIMENT INDEX

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

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

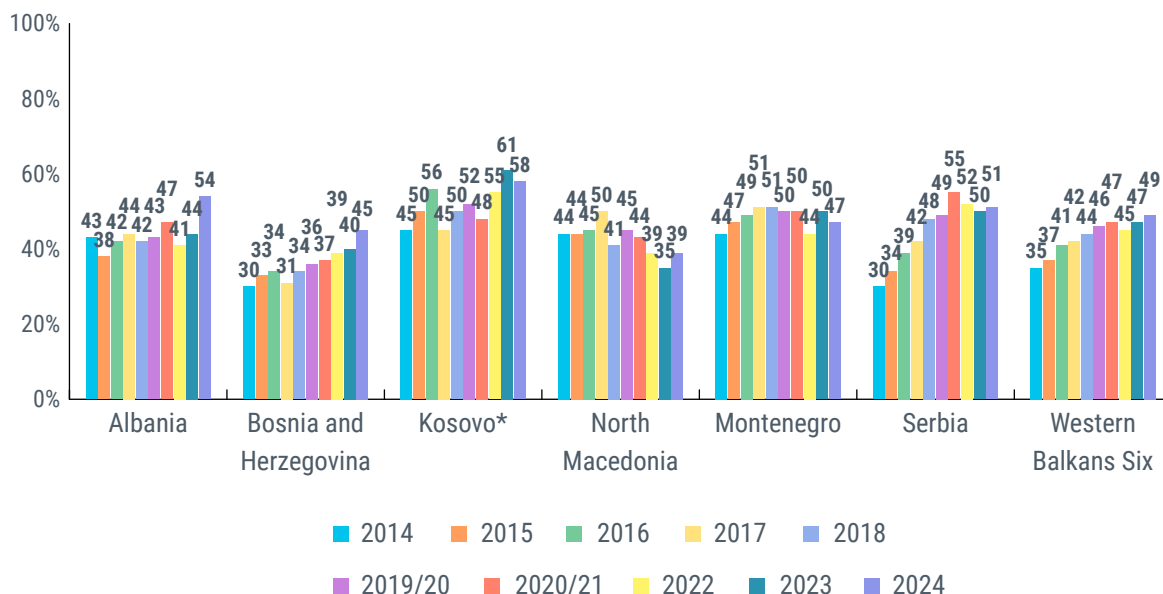
BPSI INDEX OVER THE LAST 10 YEARS

There has been a rising trend in the BPSI over the last ten years, though the advent of the COVID-19 pandemic had a small and temporary negative effect on citizens' sentiments. In the region as a whole, the BPSI reached a new peak of 49 in 2024 (Figure 1). The largest rise in public sentiment in 2024 was in Albania, though Kosovo* and Montenegro experienced a small fall in their citizens' sentiments that same year. The significant rise in public sentiment in Albania, as indicated by the BPSI reaching a new peak in 2024, can be attributed to several factors. Economic improvements, such as notable economic growth, increased employment opportunities, and better wages (increase of the minimum wage, wages of teachers, and help practitioners) and living standards, have contributed to increased public satisfaction. Additionally, an influx of foreign investments and partnerships has boosted the economy and created job opportunities. The surge in tourism has also played a role, contributing to economic growth and national pride. Political stability has enhanced public confidence. Improved international relations have boosted morale, and effective management of the COVID-19 pandemic and subsequent recovery efforts have increased trust in government institutions. These factors, individually or in combination, likely contributed to the significant rise in public sentiment in Albania in 2024.



FIGURE 19

Balkan Public Sentiment Index Trend 2014 - 2024

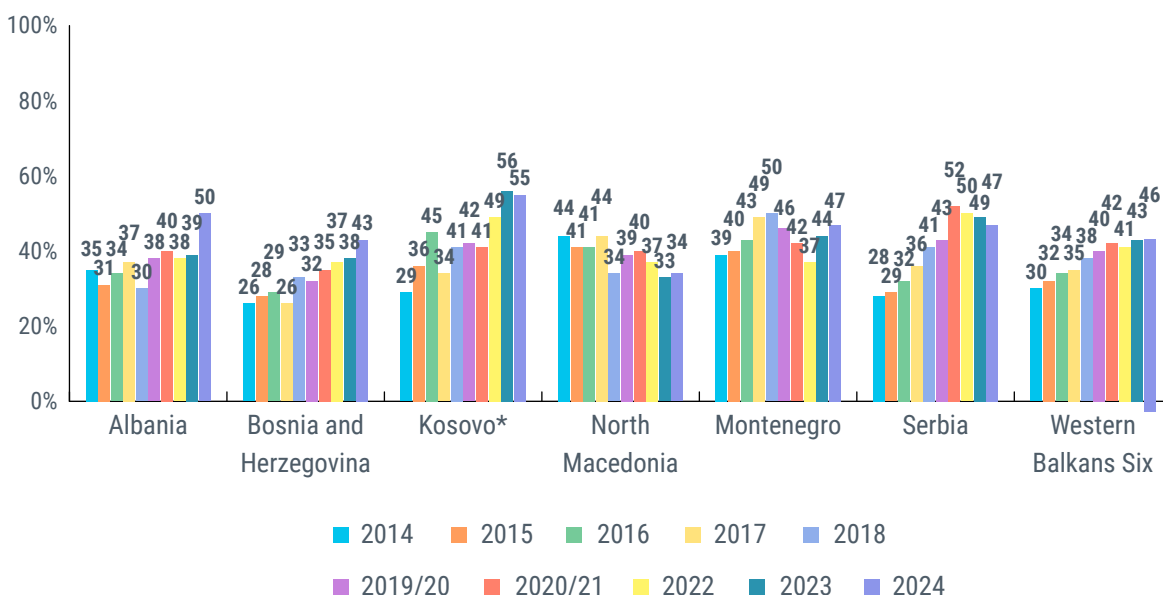


BPSI INDEX – PRESENT SITUATION

Looking at the behaviour of the BPSI – Present Situation over time, shown in Figure 2, a rising trend is again evident, with a new peak score for the region of 46 being achieved in 2024. At the economy level, there was an 11-point rise in this Index in Albania in 2024, and a 5-point rise in the Index for Bosnia and Herzegovina. Unlike their business counterparts, citizens in Montenegro did not indicate any rising dissatisfaction with the current situation. And after three years of decline respondents in North Macedonia recorded a small increase in their satisfaction.

FIGURE 20_a

BPSI - Present Situation Index Trend 2014-2024



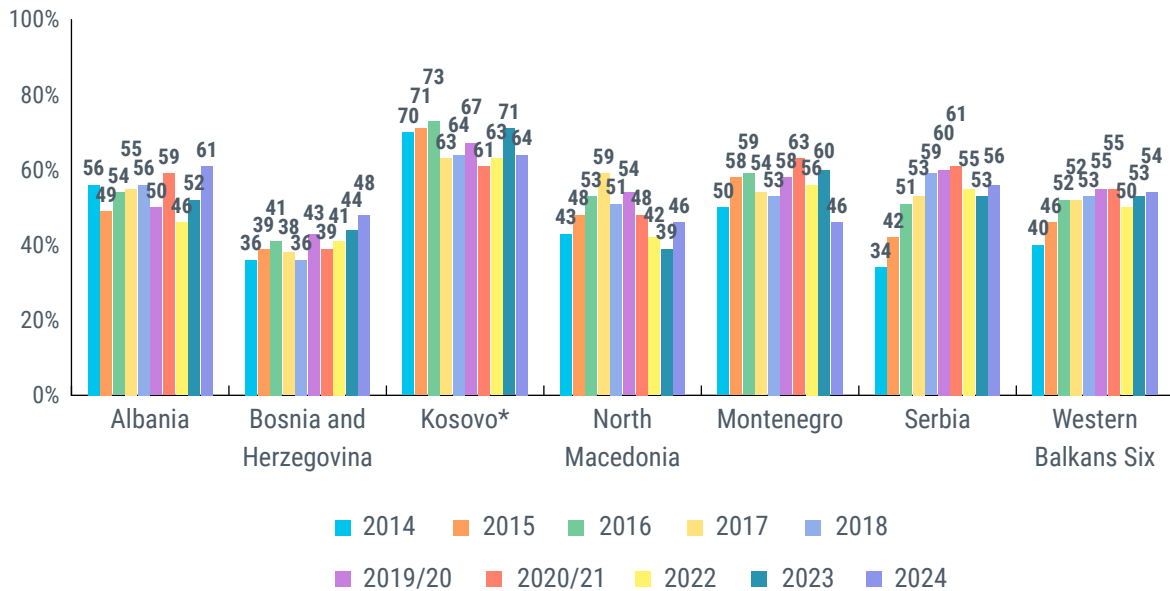


BPSI – EXPECTATION INDEX

The BPSI – Expectation Index has a small positive trend over the last decade at the regional level (Figure 3), though there has been little significant progress since 2018. In Montenegro the large 14-point fall in this Index in 2024 is consistent with the dissatisfaction evident in the Business Opinion Survey. In Kosovo* in 2024 this index fell by 7 point, but respondents there were still the most optimistic in the region. In contrast, in 2024 citizens in Albania and North Macedonia became significantly more optimistic about their own and their economy’s prospects over the next twelve months, with those in Albania creating a new peak score of 61. This result surge in optimism in Albania can be attributed to factors such as robust economic growth, effective government policies, increasing tourism, increased foreign investments, and successful pandemic recovery efforts, all of which have boosted public confidence in future economic prospects.

FIGURE 20b

BPSI - Expectation Index Trend 2014-2024





LIFE SATISFACTION AND ASSESSMENT OF GENERAL TRENDS

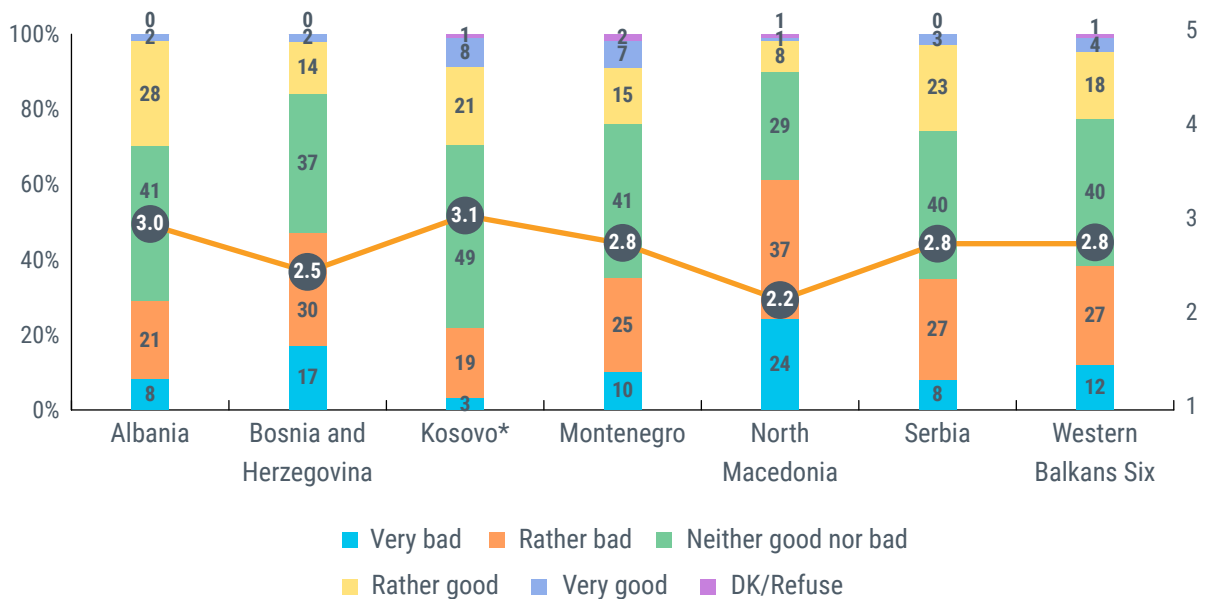
After enduring two years of persistent high inflation and observing policymakers' measures to address it, people in the Western Balkans Six are mostly taking a neutral position when assessing the overall economic conditions. Only around one-fifth of respondents express positive sentiments regarding the general situation in their economies.

FIGURE 21

Assessing the General Economic Situation: A Spectrum from Very Good to Very Bad

Q1. [S] How would you judge the GENERAL situation in [ECONOMY]? Would you say it is very good, rather good, neither good nor bad, rather bad or very bad?

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

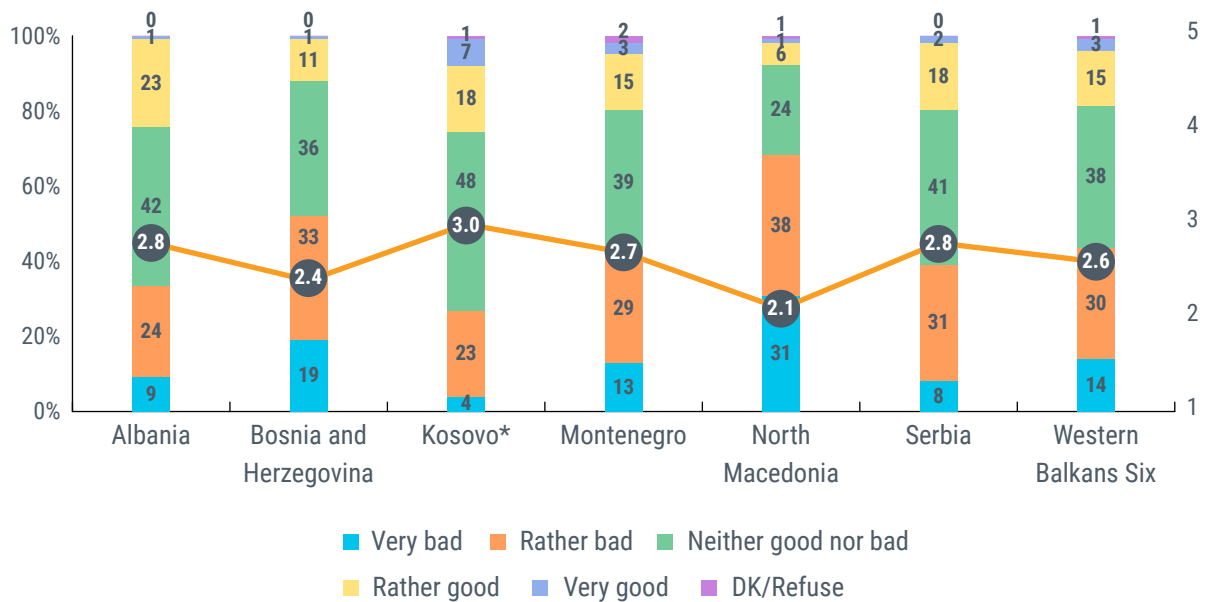


North Macedonia has the most negative economic perception, with many seeing it as “rather bad” or “very bad” (mean score 2.2). Bosnia and Herzegovina is similarly pessimistic (mean score 2.5). Kosovo* stands out with a more neutral or optimistic view (mean score 3.1), while Albania, Montenegro, and Serbia lean towards neutrality in their economic assessments (mean scores 3.0 for Albania, 2.8 for both Montenegro and Serbia). In the case of Montenegro, this is surprisingly high given its BPSI in 2024.



The overall perspective by the Western Balkans Six shows a trend of dissatisfaction or ambivalence, with 40% viewing the general situation as “neither good nor bad” and a mean score of 2.8. Compared to 2023, there has been a decline in satisfaction, with fewer respondents satisfied and more perceiving the situation neutrally. Consistently modest mean scores indicate widespread scepticisms towards progress across the region. This underscores the need for policymakers and strategists to investigate and address the underlying causes of this discontent. The survey serves as a valuable benchmark for monitoring public opinion and guiding policy adjustments and development efforts in Western Balkan economies.

FIGURE 22 Evaluating the Current State of Your Economy: Public Perceptions and Ratings
Q2. [S] Would you say that the current situation of [ECONOMY] economy is very good, rather good, neither good nor bad, rather bad or very bad?
(All respondents, N=6000, scale from 1 to 5, share of total, %, mean)



Across the Western Balkans Six, there is a prevalent sense of neutrality or dissatisfaction with the current economic situation, with 38% rating it as “neither good nor bad” and an average score of 2.6 out of 5. Across the region, these results highlight significant lack of public satisfaction or approval of the economic situation, highlighting the challenges faced by these economies. However, compared to 2023, fewer respondents view the economy as “very bad” or “rather good”, shifting towards a more neutral stance by 11 percentage points. The shared perception across Western Balkan economies could prompt policymakers and strategists to rethink economic policies aimed at boosting public sentiment and development in the region.

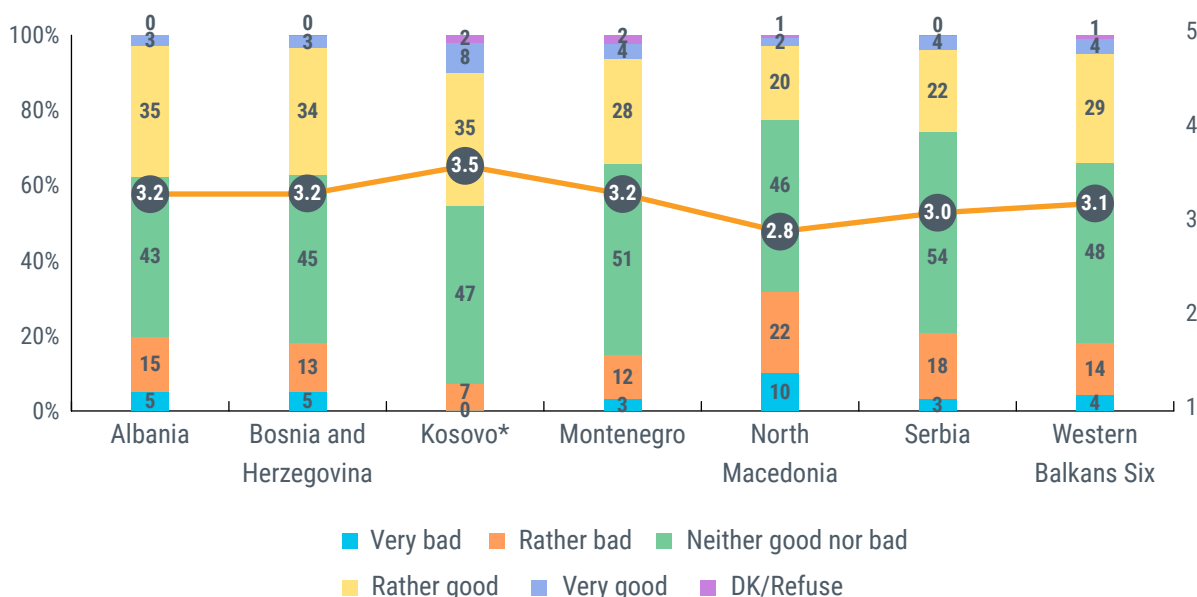


Mean ratings between 2.1 and 2.8 highlight a generally subdued outlook on the economy.² Kosovo* and Albania stand out with the highest shares of positive perceptions, while North Macedonia and Bosnia and Herzegovina lag below the regional average. Kosovo*, Serbia, and Albania also report the lowest levels of respondents perceiving the economy as “very bad”.

FIGURE 23

Assessing Respondent Household's Financial Health
Q3. [S] How would you judge the financial situation of your household? Would you say it is very good, rather good, neither good nor bad, rather bad or very bad?

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



Assessing households’ financial health, results show a trend towards neutral to mildly positive views across the Western Balkans Six, reflecting nonetheless diverse economic difficulties residents have faced. Rising inflation in 2023 exacerbated daily expenses and healthcare costs not covered by insurance, highlighting the need for governmental attention and intervention.

Overall, there is modest optimism, with a third of respondents rating their financial situation as “very good or rather good”, and 48% viewing it as neutral (“neither good nor bad”), resulting in an average score of 3.1. Compared to 2023, there has been a notable 16-point decrease in those seeing their situation as “very or rather bad”. While not extremely negative, these moderate views may prompt regional policymakers to focus on strategies for enhancing economic stability and personal financial satisfaction.



² For Albania the mean rating is at 2.8, while the share of respondents with a perception “neither good or bad” is 42%. In Bosnia and Herzegovina, dissatisfaction is more pronounced, evidenced by 33% rating the economy as “rather bad” and the second lowest mean score of all at 2.4. Kosovo* presents a relatively balanced distribution across the assessment spectrum with a mean of 2.7, and “neither good nor bad” (48%) is the most selected option. Only 18% of respondents in Montenegro assess their economy’s situation as “rather or Very Good” with an overall mean of 2.7. North Macedonia reflects critically negative views, with the lowest mean of 2.1, with 31% of respondents describing the economic situation as “rather bad”. While still harbouring overall negative views (mean of 2.8), Serbia has the second highest proportion of neutral perceptions (41%).



Albania leans towards optimism with an average score of 3.2, like Bosnia and Herzegovina where 38% see their financial situation as “rather or very good”. Kosovo* is the most positive, with an average score of 3.5 and only 7% rating their financial status as “rather or very bad”. Montenegro shows cautious optimism, with a majority neutral about their finances but an average score of 3.2 indicates some underlying concerns. North Macedonia and Serbia also lean towards neutrality, with average scores of 2.8 and 3.0, respectively, and about half describing their financial situation as “neither good nor bad”.

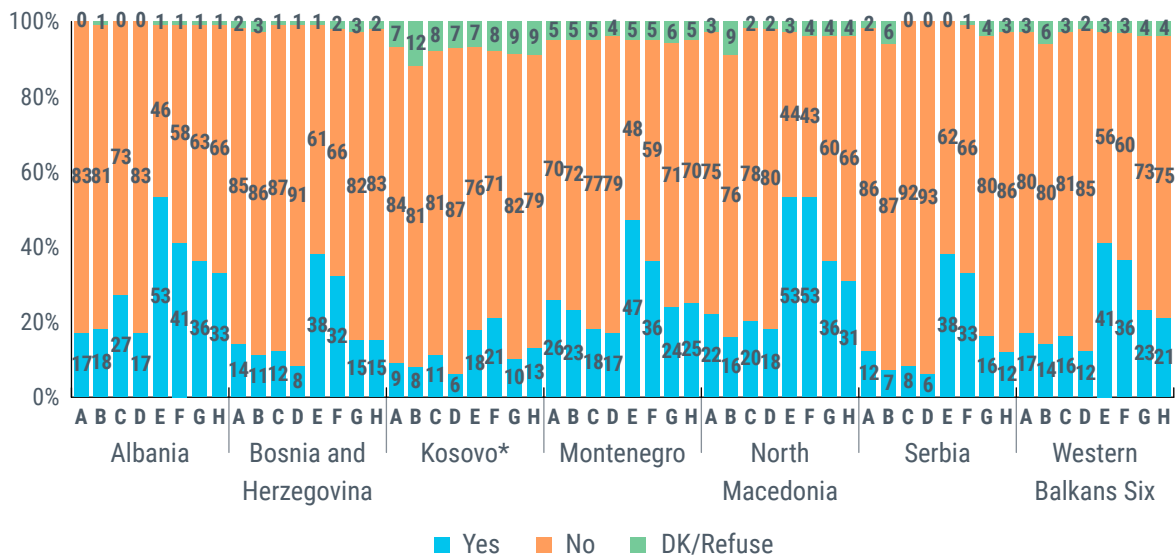
FIGURE 24

Challenges Faced in the Past 12 Months

Q4. [S PER ROW] Did you face any of the following problems (even at least once) during the past 12 months?

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

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



In terms of financial struggles experienced by individuals in various Western Balkan economies over the past year, the multitude is broad³, from meeting increasing daily living costs to managing health-care expenses not covered by insurance.



³ In Albania, findings reveal widespread financial difficulties: 17% struggled with rent or utility bills, holidays were out of reach for 53%, and 41% faced challenges with house repairs. Health costs were significant, with 36% unable to pay for treatments not covered by insurance and 33% struggling with non-covered medicines. Bosnia and Herzegovina had fewer instances but still notable: 38% couldn't afford holidays, and 32% faced house repair difficulties. Kosovo* consistently reported lower financial difficulties. Montenegro showed higher prevalence: 47% could not afford holidays, 36% had issues with house repairs, 24% struggled with non-covered treatments, and 25% with non-covered medicines. North Macedonia faced significant strain: 22% struggled with rent, 16% with loan payments, and many had difficulty with heating and essential supplies. Serbia had fewer financial challenges: 38% could not afford holidays, 33% had house repair issues, and fewer struggled with health costs (16% with treatments, 12% with medicines).

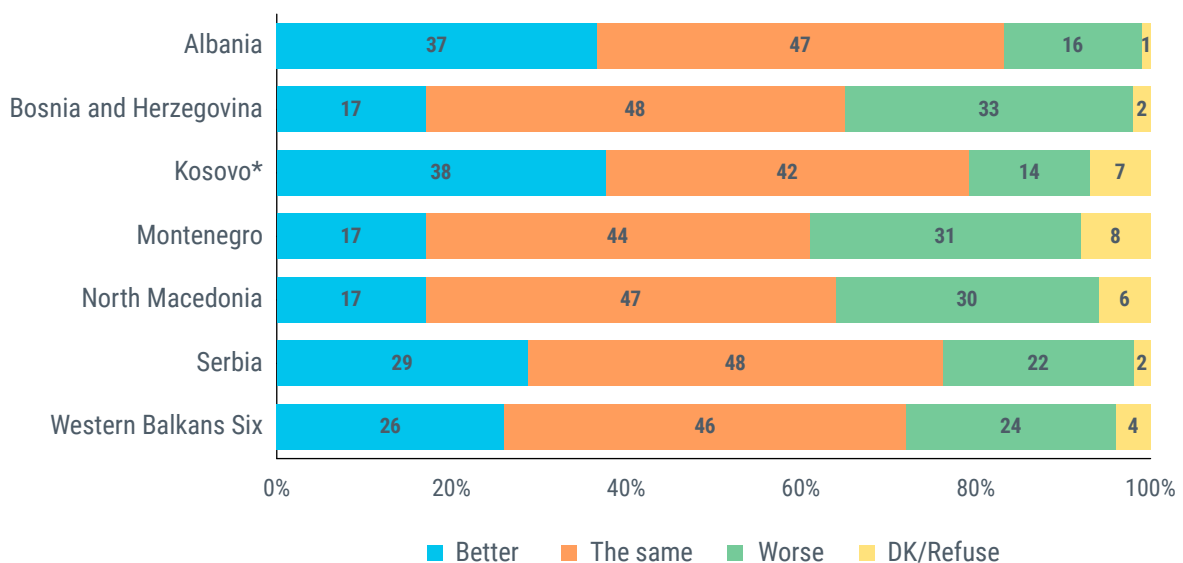


Regionally, there was a lower incidence of financial difficulties in meeting basic needs like rent, utilities, and essential supplies, but many faced challenges with affording holidays and home repairs. These trends reflect heightened inflation due to Russia's war in Ukraine, prompting central banks to raise interest rates⁴, potentially increasing concerns about loan repayments. These economic pressures, coupled with ongoing healthcare challenges, highlight the need for targeted interventions from governments and international bodies to enhance economic stability, expand healthcare coverage, and ultimately improve the overall welfare and quality of life for residents in these economies.

FIGURE 25

Expectations for the Respondent's Economy in the Next 12 Months Q5. [S] What are your expectations for [ECONOMY] for the next 12 months? Do you think that the situation will be better, worse or the same?

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



Overall, the Western Balkans Six display a mostly neutral outlook, with 46% of respondents anticipating no change in the economic situation, 26% hopeful for improvement, and a significant 24% preparing for an economic downturn. This marks a notable shift from 2023, with a 5-percentage point decrease in those expecting improvement and a 21-percentage point decrease in those anticipating deterioration.

Serbia is cautiously optimistic, with 29% anticipating economic improvement, contrasting with 48% expecting stability and 22% fearing deterioration. North Macedonia and Montenegro show more guarded sentiment, with 30% and 31% fearing worse economic outcomes, respectively. Bosnia and Herzegovina reflects heightened economic pessimism, with only 17% optimistic about improvements and 33% predicting deterioration. In contrast, Albania and Kosovo* are more optimistic, with 37% and 38% foreseeing economic improvement, respectively, though many also expect no change. These findings underscore the challenges and differing economic perspectives in the Western Balkans Six, highlighting varying levels of confidence in economic policies and future leadership.



⁴ [Western Balkans Regular Economic Report, No. 25, Spring 2024](#) "Invigorating Growth", Washington DC

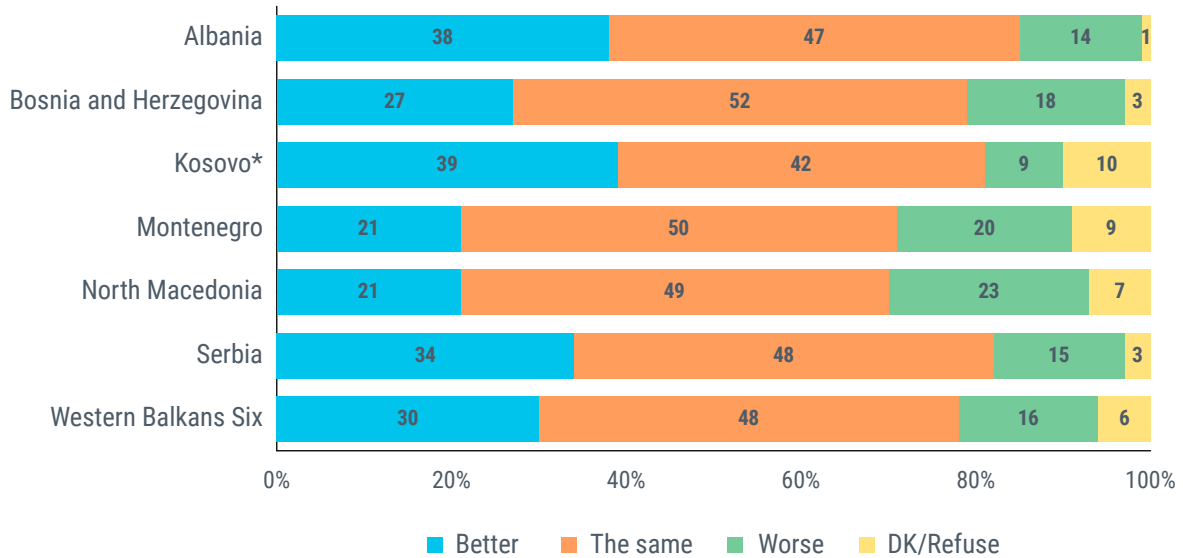


FIGURE 26

Future Financial Outlook: Better, Worse, or the Same

Q6. [S] What are your expectations for your financial situation in the next 12 months? Do you think that your financial situation will be better, worse or the same?

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



Financial expectations across Western Balkan economies for the coming year appear diverse. This reflects varying levels of economic optimism and pessimism, influenced by unique economic policies, historical performance, and socio-economic challenges. Despite uncertainties related to governance, regional stability, and global economic trends, expectations for a worsened financial situation have decreased by 6 percentage points compared to 2023, while expectations for improvement have slightly declined by 2 percentage points. A substantial 48% of respondents remain neutral, anticipating no change in the financial situation, underscoring persistent sentiments observed in previous years.

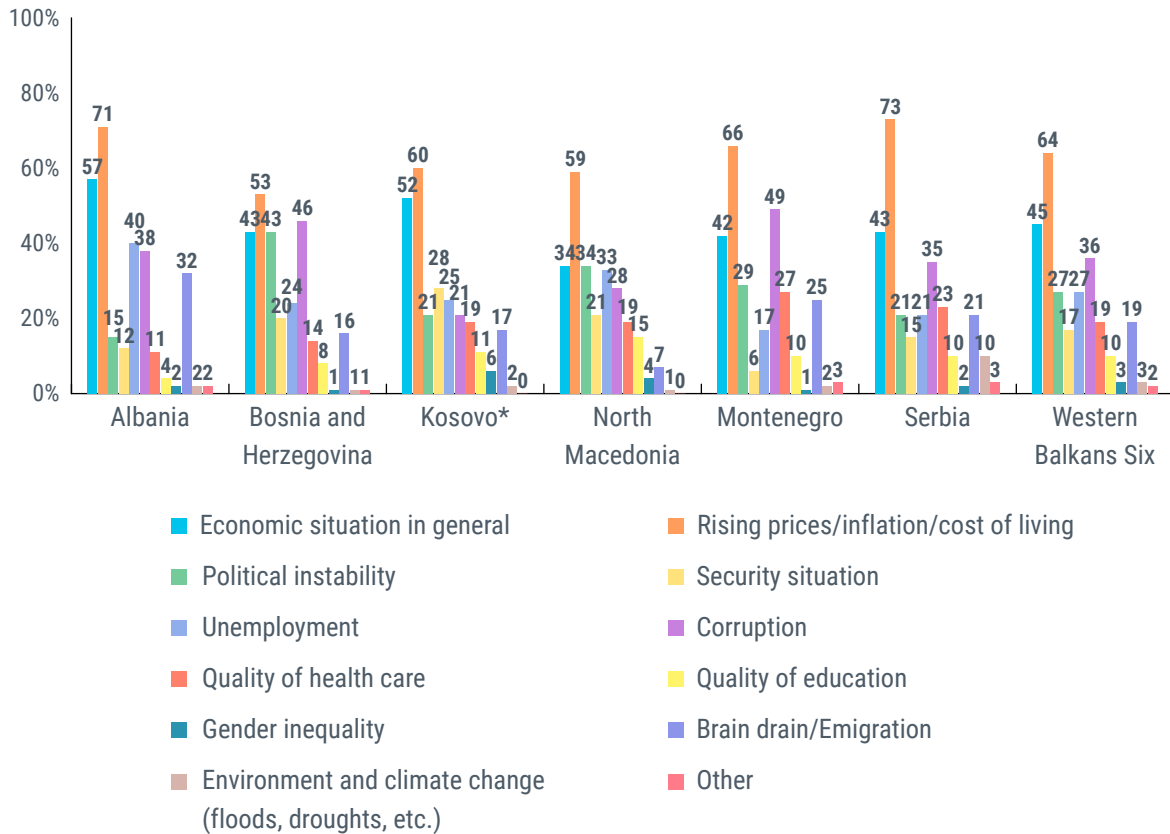
In line with the previous chart, Kosovo* and Albania emerge as the most optimistic about their short-term financial future. In Kosovo*, 39% of respondents foresee improved financial conditions, with 42% expecting stability. In Albania, 38% anticipate improvement, and 47% predict no change, indicating a predominantly positive outlook. Serbia follows closely with 34% expecting financial gains, balanced by 48% foreseeing stability, showing a cautious yet hopeful perspective. Conversely, Montenegro and North Macedonia express significant concern about their financial prospects. Both economies have the highest proportions anticipating worsening conditions (20% in Montenegro and 23% in North Macedonia), with only 21% in each expecting improvement. Bosnia and Herzegovina shows a more mixed sentiment, with 27% hopeful for better financial times ahead, but 52% preparing for a stagnant economy, and 18% anticipating a decline. These varying outlooks reflect diverse expectations and concerns across the region.



FIGURE 27

Top 3 Key Issues Facing the Economy of the Respondents
Q7. [M – MAX 3] What do you think are the 3 (three) most important problems facing [ECONOMY]?

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



Asked about top issues facing the economy, respondents reflect a blend of socioeconomic and political challenges, with a notable emphasis on the inflation, economic situation, and corruption across different economies. Each economy exhibits its unique set of priorities, shedding light on the varied economic landscapes and issues that influence public opinion in the Balkans.

In Albania, inflation tops concerns for 71%, followed by worries about the economy (57%) and unemployment (40%), alongside significant apprehension about corruption (38%). Bosnia and Herzegovina shares concerns about inflation (53%) and corruption (46%). Kosovo* emphasizes inflation, economic conditions, corruption (28%), unemployment (24%), and security (28%). Montenegro focuses on inflation (56%), political stability (34%), and economic conditions (34%), while North Macedonia is notably concerned about inflation (66%) and unemployment. Serbia highlights inflation (73%), the economy (41%), and corruption (35%) as major issues.

The Western Balkans Six shares common concerns about inflation (64%), the overall economic situation (45%), and corruption (36%), reflecting widespread anxiety over economic instability and the need for stronger anti-corruption measures. The focus on inflation is likely influenced by the peak seen in 2023, raising concerns about continued inflationary pressures in the short and medium term.

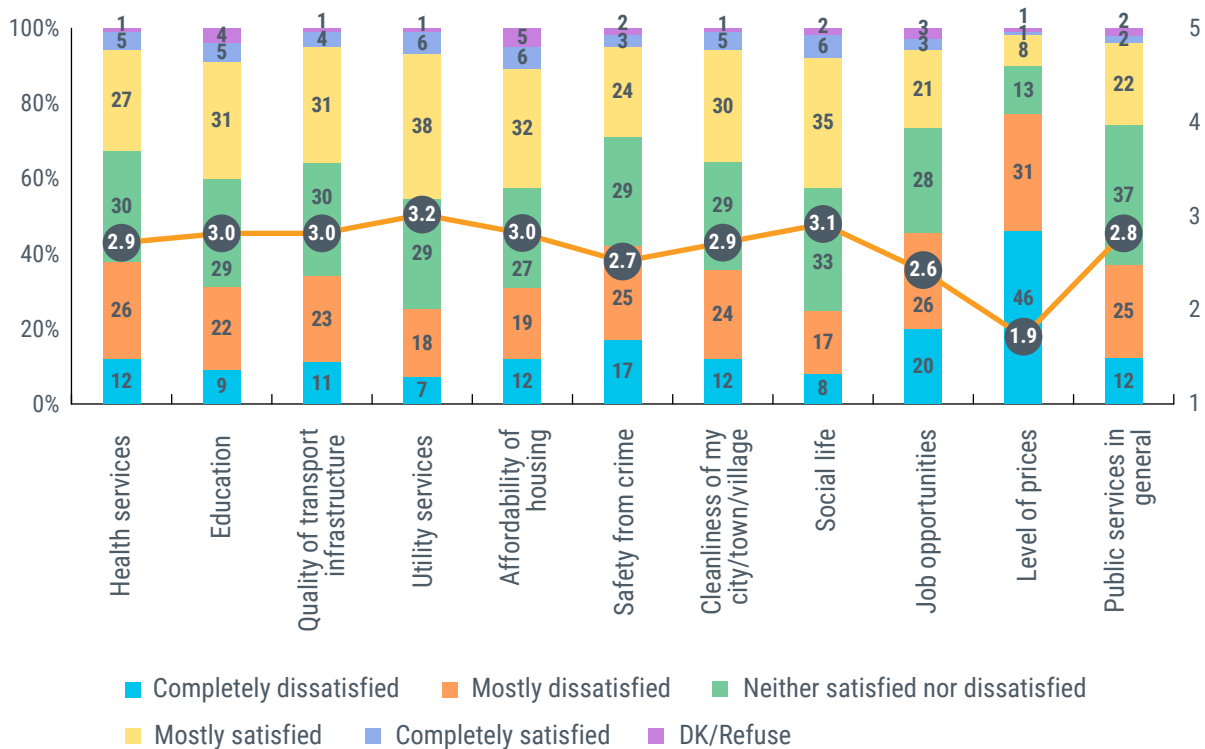


Interestingly, corruption has risen in priority by 9 percentage points compared to previous surveys, surpassing unemployment by 5 percentage points in public concerns. While brain drain remains a concern in the region, particularly in Albania and North Macedonia, the decline in perception is less pronounced compared to 2023.⁵ Concerns about education quality and environmental issues, where the region lags internationally, are relatively low amongst respondents in the Western Balkans Six.

FIGURE 28

Your Satisfaction with Local Living Conditions: Tell Us How You Feel Q8. [S PER ROW] Could you please tell me how satisfied are you with each of the following in your place of living?

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



Satisfaction levels amongst Western Balkan residents vary considerably across the different aspects assessed in the chart. The mean satisfaction score for the level of prices stands out as the lowest, with a score of 1.9 indicating widespread concern with the inflation peak in 2023. Job opportunities had the next lowest mean score at 2.6, followed by safety from crime. The highest mean scores are satisfaction with utility services, followed by social life (which scores the highest percent of respondents who were completely satisfied) and education, quality of transport infrastructure and affordability of housing. Respondents report less satisfaction than in 2023 concerning utility services and cleanliness of the city/town/village and the same level of satisfaction regarding the level of prices, despite a decline in inflation rates across the region. Satisfaction with all other items is reported as slightly improved with a mean score higher by 0.1 to 0.2. The following is a summary of main perceptions of respondents regarding individual categories:

⁵ Regional Cooperation Council, Balkan Barometer 2023, Public Opinion, Analytical Report, Sarajevo, Bosnia and Herzegovina



- In 2024, **health service** satisfaction in the Western Balkans Six has improved compared to 2023, with a mean score increase of 0.2 points. Notably, this improvement is largely driven by the perception in Albania and Montenegro, despite the absence of specific policy interventions in the sector. Albania particularly stands out with the highest mean satisfaction score of 3.2, and Kosovo* ranks second highest in mean score.

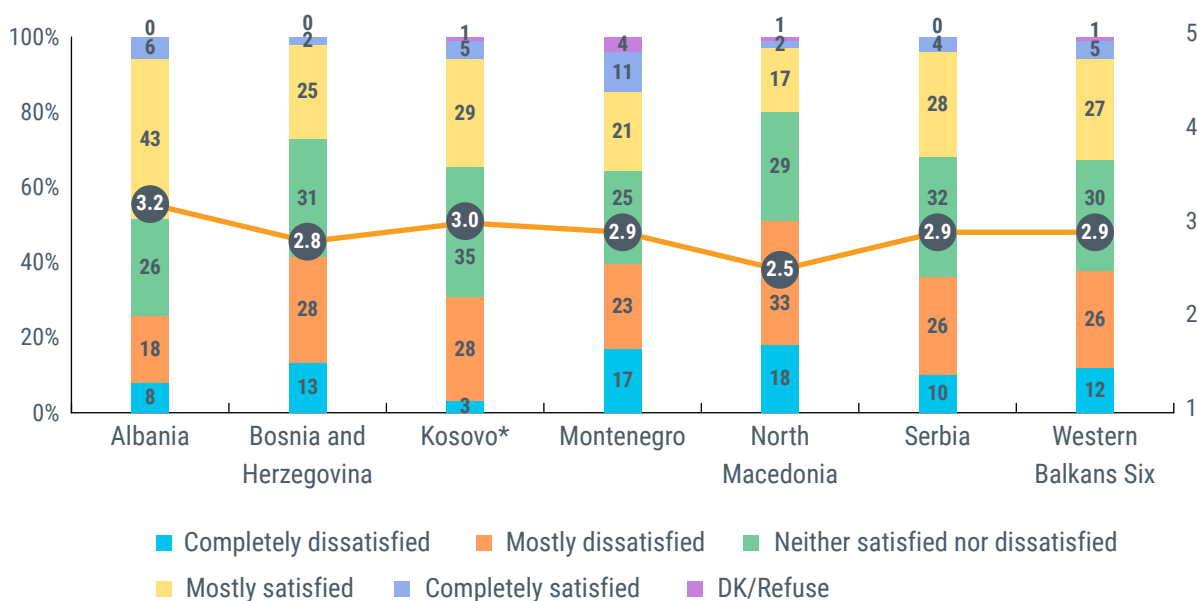
FIGURE 29

Level of Satisfaction with Health Services

Q8. [S PER ROW] Could you please tell me how satisfied are you with each of the following in your place of living?

Q.8-1 Health services

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



- Regionally, satisfaction with **education** has seen a slight improvement compared to 2023, with the mean score increasing by 0.2 points - primarily driven by better assessments in Albania and Montenegro since the last Barometer. Albania stands out with the highest mean satisfaction score of 3.4, where 57% of respondents reported feeling mostly or completely satisfied. Serbia follows closely with a mean score of 3.2, whereas in Bosnia and Herzegovina, as well as Kosovo*, respondents are predominantly in the neither satisfied nor dissatisfied category, with a satisfaction mean of 3.0. North Macedonia shows the lowest level of satisfaction with education, with a mean score of 2.6. These relatively high satisfaction levels with educational services contrast with the Western Balkan economies' poorer performance in international assessments of educational quality, making the findings somewhat unexpected.

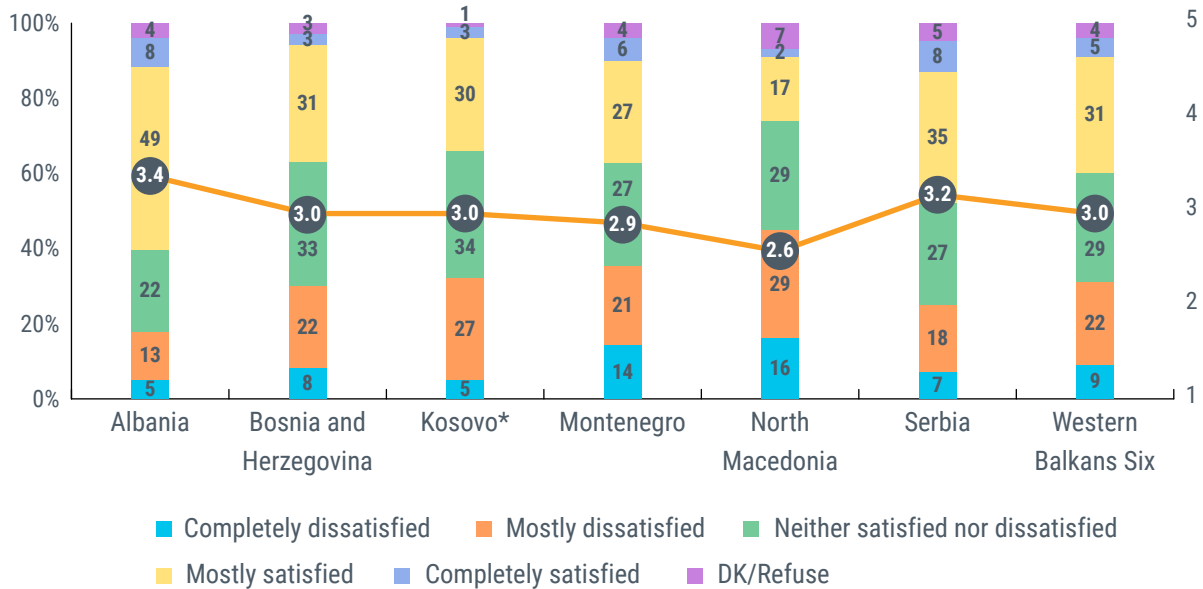


FIGURE 30

Level of Satisfaction with Education Services
Q8. [S PER ROW] Could you please tell me how satisfied are you with each of the following in your place of living?

Q.8-2 Education

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



■ In their assessment of **transport quality**, respondents tend to have a cautious attitude, with 30% of participants neither satisfied nor dissatisfied, 35% somewhat satisfied, and 34% somewhat dissatisfied with the current state of transport infrastructure. Albania stands out with the highest satisfaction score for transport quality, whereas North Macedonia reports the highest dissatisfaction. There has been an improvement in mean satisfaction scores for transport quality in Albania, Bosnia and Herzegovina, and Montenegro compared to 2023, contributing to a slight overall increase of 0.2 in the Western Balkans Six' mean score.

■ Concerning **utility services, encompassing water and sewage, electricity, gas supply, telephone, and internet**, almost one out of two respondents express some level of satisfaction, while one out of four lean towards dissatisfaction. The region's mean satisfaction score is 3.2, an improvement of 0.4 compared to 2023, except for Kosovo* and Serbia, which have maintained similar satisfaction levels. Albania stands out with the highest satisfaction rate and a notable increase in mean score compared to the previous assessment. Bosnia and Herzegovina also shows significant satisfaction but with a notable neutral portion. Kosovo* maintains a balanced distribution in satisfaction levels. Montenegro reflects both high satisfaction and dissatisfaction, resulting in the lowest mean score. North Macedonia's majority holds a neutral stance, while Serbia demonstrates relatively higher satisfaction with utility services compared to other economies in the region.



FIGURE 31

Level of Satisfaction with Quality of Transport
Q8. [S PER ROW] Could you please tell me how satisfied are you with each of the following in your place of living?

Quality of transport

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

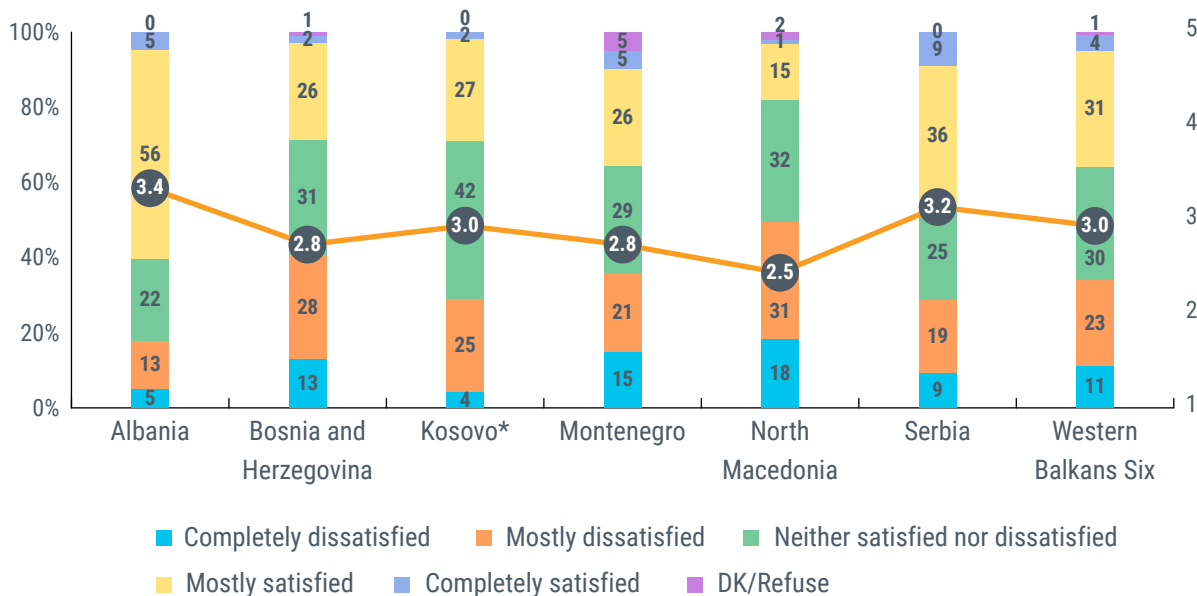


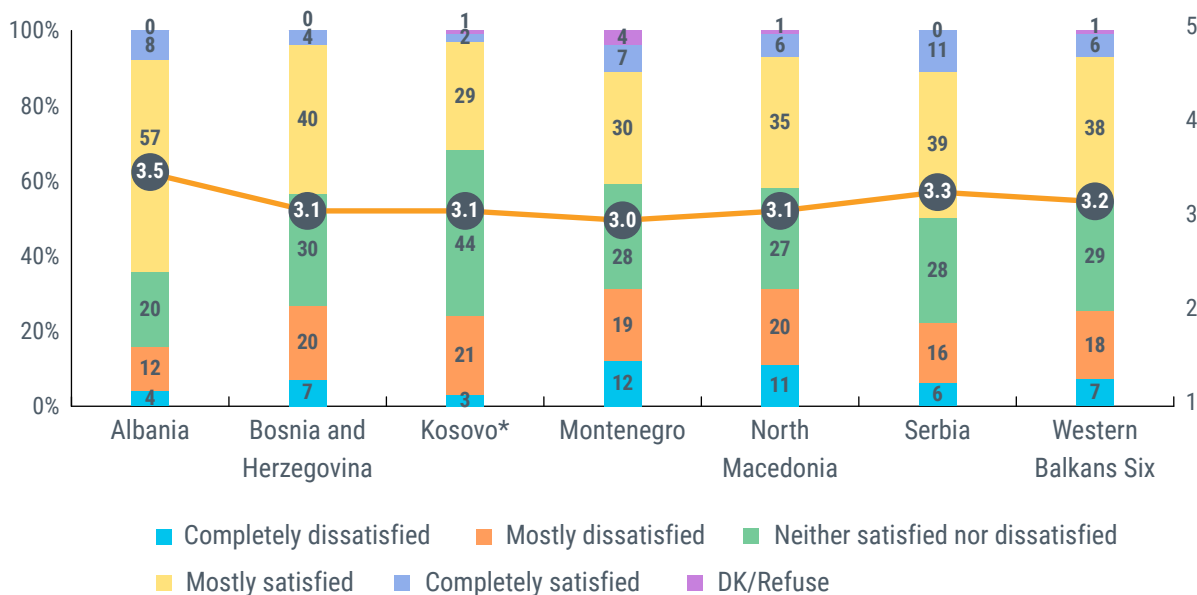
FIGURE 32

Level of Satisfaction with Utility Services

Q8. [S PER ROW] Could you please tell me how satisfied are you with each of the following in your place of living?

Q.8-4 Utility services (water and sewage, electricity, gas supply, telephone, Internet)

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





■ Across the six economies there are notable differences in satisfaction levels regarding **housing affordability**. In Albania, a significant portion of respondents report being completely satisfied, with a mean satisfaction score of 3.4 in 2024, marking a considerable improvement from the previous year (+1.1 in the mean score). On the other hand, in Kosovo*, a higher percentage of respondents indicate neither satisfaction nor dissatisfaction with their housing situation. In North Macedonia, the situation is more concerning, with a majority (51%) expressing some level of dissatisfaction with housing affordability, and a relatively low mean satisfaction score of 2.3. This indicates a less favourable perception compared to other economies in the region. Overall, across the Western Balkans Six, the mean satisfaction score is 3.0, reflecting mixed sentiments with approximately one third of respondents expressing some level of dissatisfaction regarding housing affordability. While there has been a slight improvement of 0.2 in the mean score compared to the previous year, there are variations amongst individual economies in terms of satisfaction levels and perceived affordability challenges.

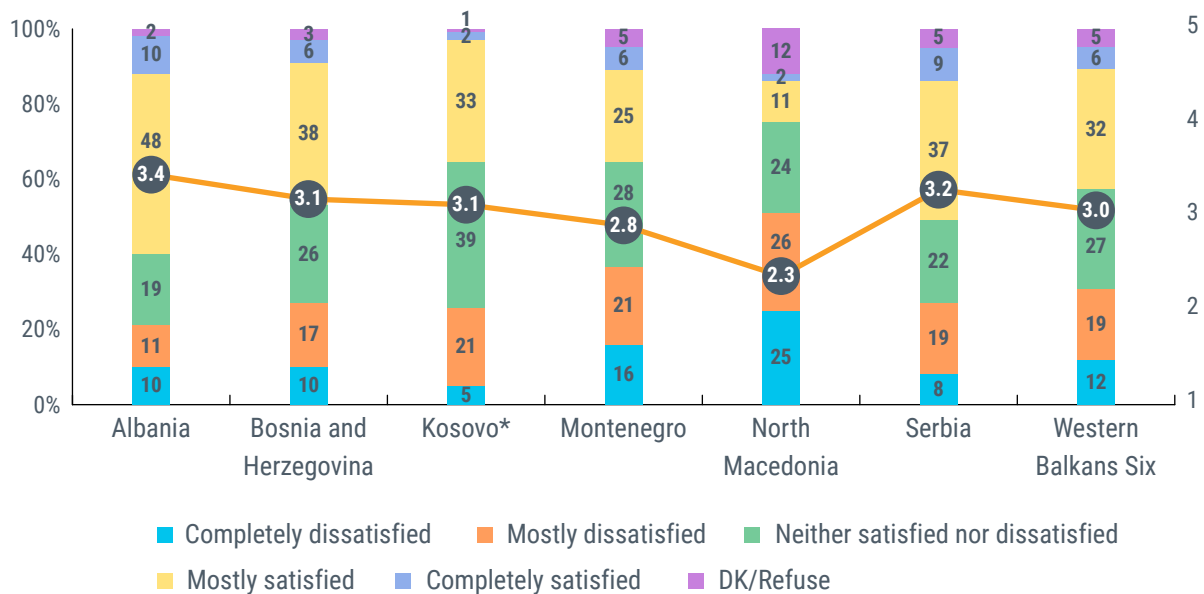
FIGURE 33

Level of Satisfaction with Affordability of Housing

Q8. [S PER ROW] Could you please tell me how satisfied are you with each of the following in your place of living?

Affordability of housing

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



■ Across the region, 42% express varying levels of dissatisfaction, highlighting significant worries regarding **safety from crime**. Conversely, 27% report feeling satisfied and perceive no threat, while 29% remain neutral on the matter. Notably, Albania stands out with the highest percentage (40%) of satisfied respondents, resulting in a mean satisfaction score of 3.0, slightly lower than Serbia's score of 3.1. Kosovo* and Montenegro closely follow with 22% of respondents indicating satisfaction regarding safety from crime. In contrast, Bosnia and Herzegovina and North Macedonia paint a less optimistic picture. In Bosnia and Herzegovina, more than half of respondents express dissatisfaction with safety from crime, which is the second highest amongst the surveyed. Similarly, North Macedonia shows a mean score of 2.4, with more than half of respondents ex-



pressing dissatisfaction. Compared to 2023, there is a slight decline in the satisfaction with safety from crime, except for Albania and North Macedonia, where there is an increased mean score (higher for Albania than North Macedonia).

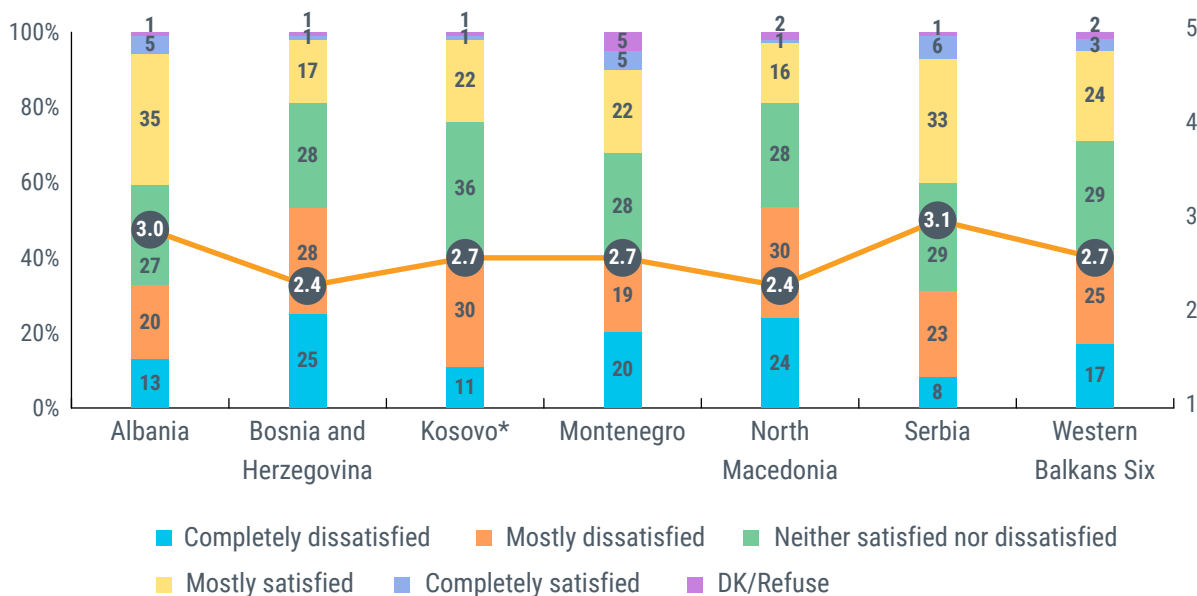
FIGURE 34

Level of Satisfaction with Safety from Crime

Q8. [S PER ROW] Could you please tell me how satisfied are you with each of the following in your place of living?

Safety from crime

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



■ Across the region, there is a prevalent dissatisfaction with the **cleanliness of cities**, towns, or villages compared to satisfaction levels. The mean satisfaction score for 2024 shows a slight decline from the previous year (-0.1 pp). Albania stands out with the highest satisfaction levels, indicating a positive trend in perceptions of cleanliness. Conversely, Kosovo* differs significantly with a notable portion expressing dissatisfaction and neutrality towards this aspect. North Macedonia records the lowest satisfaction levels, suggesting ongoing challenges in addressing cleanliness concerns within the region.

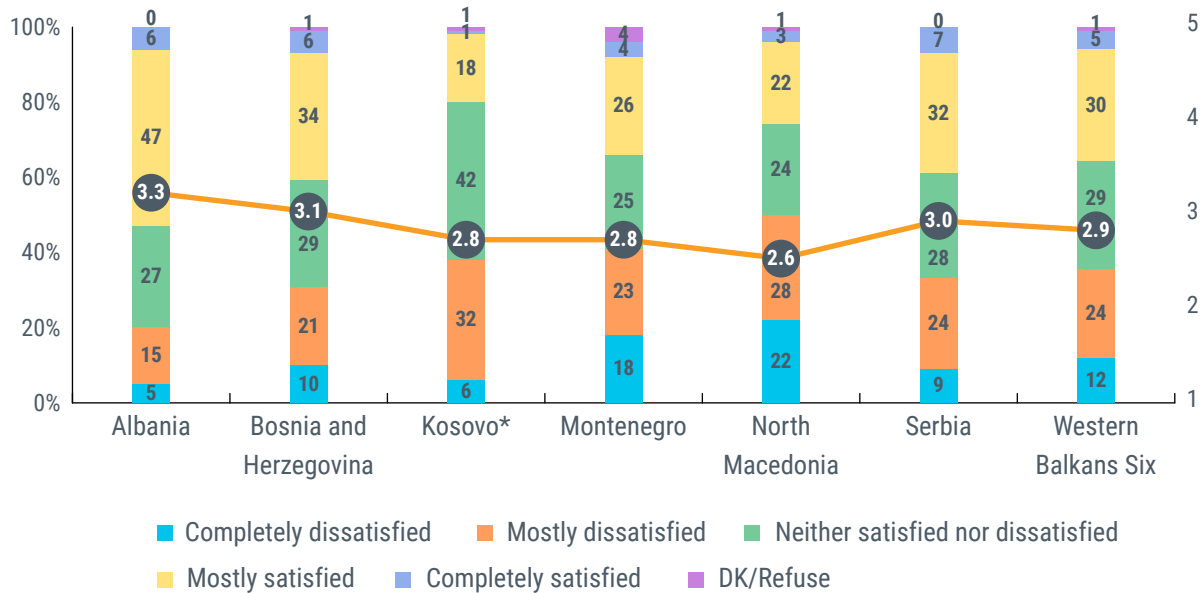


FIGURE 35

Level of Satisfaction with Cleanness of My City/Town/Village Q8. [S PER ROW] Could you please tell me how satisfied are you with each of the following in your place of living?

Cleanliness of my city/town/village

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



- In the Western Balkans Six, a sizeable portion of respondents (41%) acknowledges a level of satisfaction with their **social life** in the region, reflected in a mean score of 3.1 out of 5. Serbia emerges as the frontrunner, boasting the highest percentage of satisfied respondents at 52%, followed closely by Bosnia and Herzegovina at 45% and Albania at 41%. Montenegro, Kosovo* and North Macedonia have the lowest mean score (3.0) and share similar levels of satisfaction, with 35%, 34% and 34% respectively expressing some contentment with their social life in their respective regions.
- Regarding **job opportunities**, Western Balkans Six respondents generally harbour dissatisfaction with the available job prospects within the region. The mean score for the region as a whole was a lowly 2.6, 0.2 higher compared to 2023. A substantial number of respondents across the region express dissatisfaction with job opportunities, while a significant portion remains neutral, indicating a lack of strong sentiment either way. Bosnia and Herzegovina stands out with the highest dissatisfaction rates, followed closely by North Macedonia, Montenegro, and Albania. In contrast, Serbia and Albania show higher levels of satisfaction with job opportunities compared to others surveyed. The above could be strongly linked with the current state of the economy across the region and potential shift in economic model.



FIGURE 36

Level of Satisfaction with Social Life

Q8. [S PER ROW] Could you please tell me how satisfied are you with each of the following in your place of living?

Social Life

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

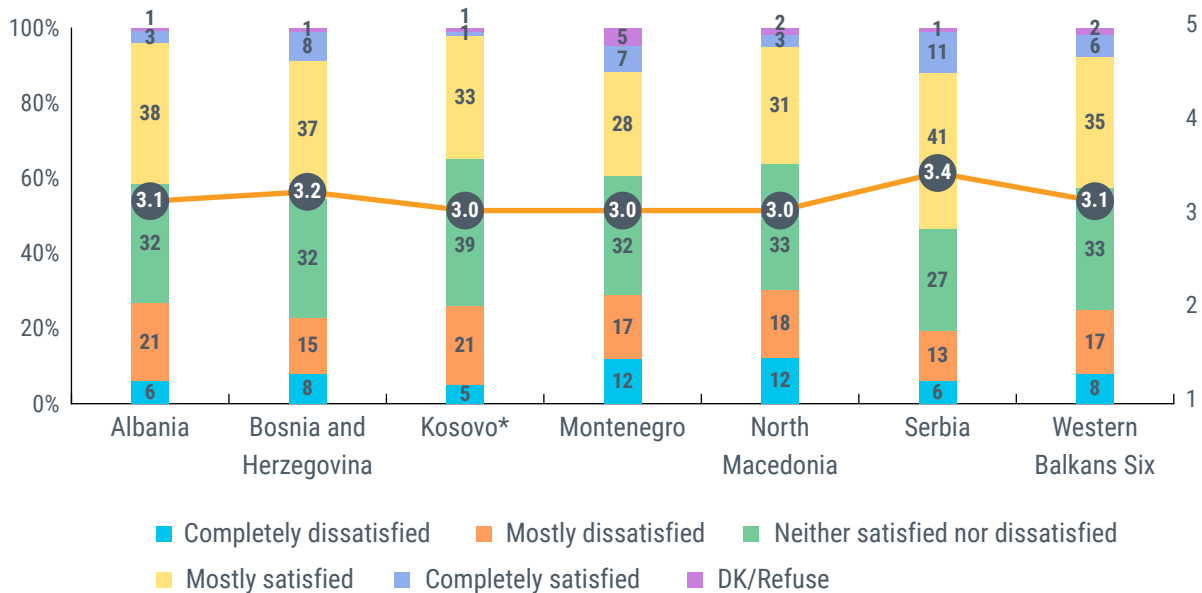


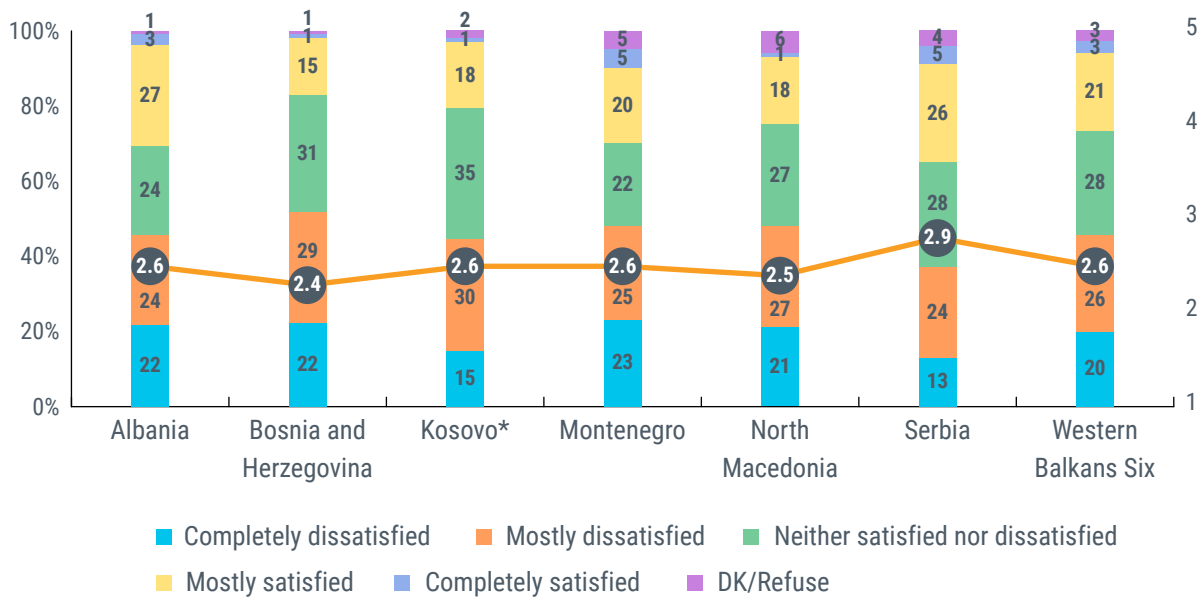
FIGURE 37

Level of Satisfaction with Job Opportunities

Q8. [S PER ROW] Could you please tell me how satisfied are you with each of the following in your place of living?

Job opportunities

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





- Reflecting prevailing sentiments, **rising prices** are the foremost source of dissatisfaction in the region. Inflation emerges as a significant concern amongst respondents, with a clear majority expressing dissatisfaction and highlighting pricing levels as a critical issue. North Macedonia stands out with the highest level of discontent regarding prices, followed closely by Bosnia and Herzegovina and Serbia. This widespread dissatisfaction underscores the urgent need to address pricing concerns throughout the region, given inflation had risen significantly in all economies, except for Albania, which had the lowest inflation in the region.

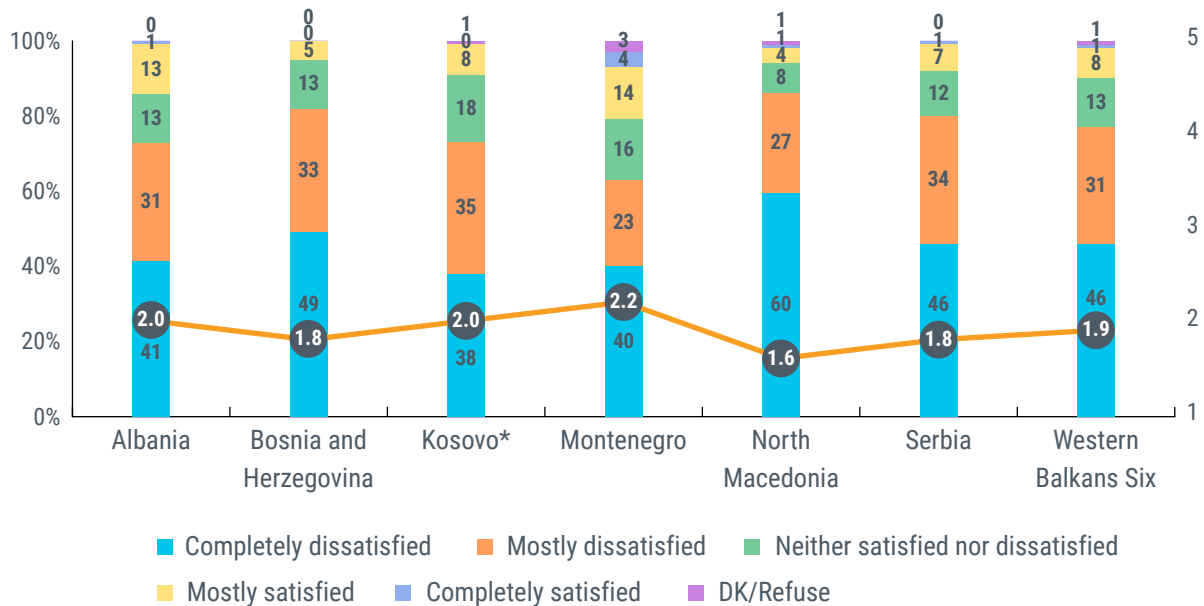
FIGURE 38

Level of Satisfaction with Level of Prices

Q8. [S PER ROW] Could you please tell me how satisfied are you with each of the following in your place of living?

Level of Prices

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



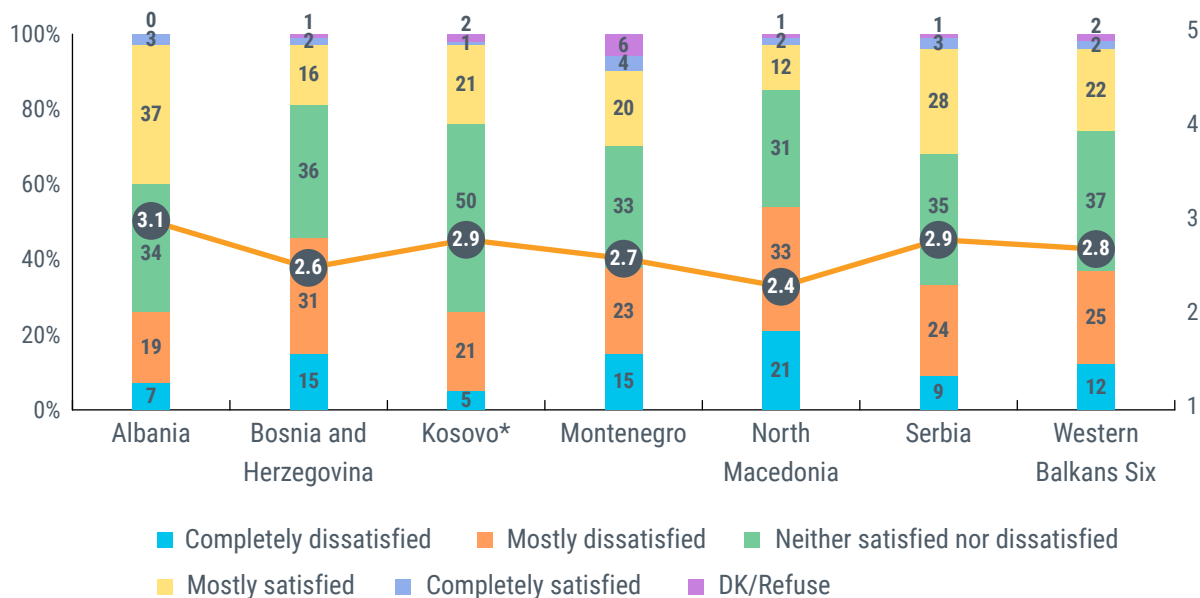
- In the Western Balkans Six, there is a notable balance between dissatisfaction and neutrality amongst respondents regarding **public services**. While a significant portion expresses dissatisfaction, an equal proportion remains neutral, with fewer respondents indicating satisfaction. Overall, the region shows a slight decline in satisfaction levels compared to the previous year, particularly evident in North Macedonia. Albania stands out with the highest satisfaction rates and a positive mean score, contrasting with less favourable sentiments in other economies. North Macedonia and Bosnia and Herzegovina demonstrate significant dissatisfaction levels towards public services, indicating widespread concerns. Kosovo* shows a diverse range of perceptions, with many respondents remaining neutral or leaning towards dissatisfaction. These findings underscore the varied perspectives on public services across the Western Balkans Six, highlighting the complexity and diversity of public opinion within the region.



FIGURE 39

Level of Satisfaction with Public Services in General
Q8. [S PER ROW] Could you please tell me how satisfied are you with each of the following in your place of living?
Public services in general

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





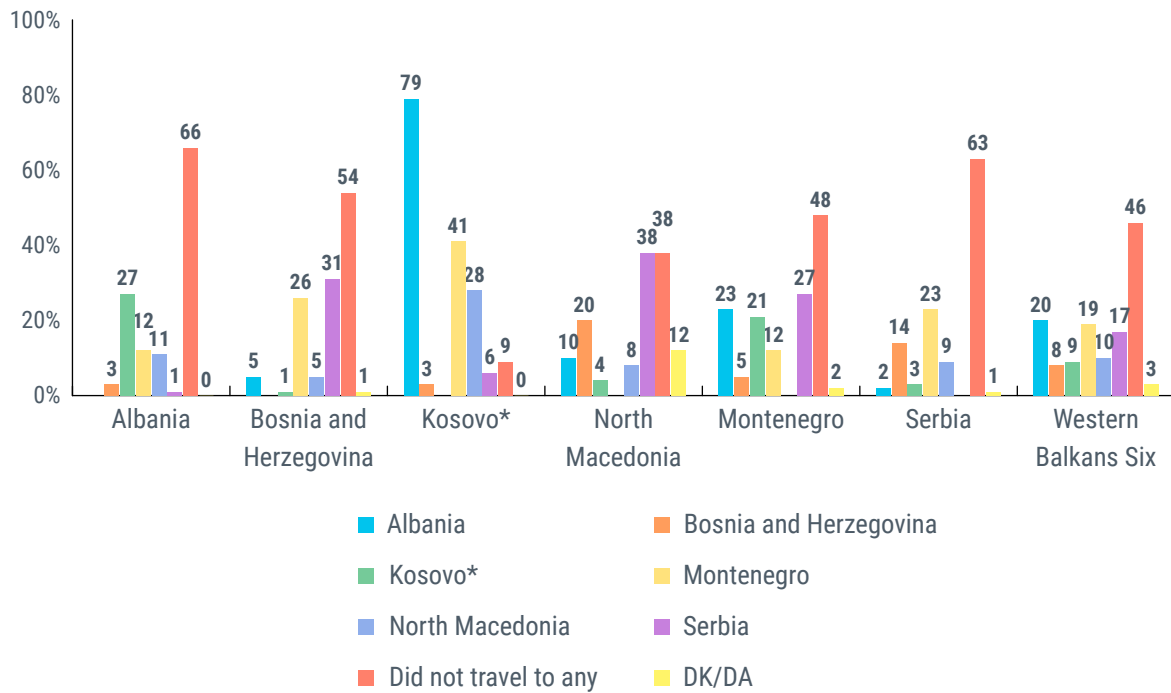
ATTITUDES TOWARDS REGIONAL COOPERATION AND EU INTEGRATION

FIGURE 40

Western Balkans Six Travel: Destinations Visited in the Past 12 Months

Q9. [M] Which economies of the Western Balkans did you travel to during the past 12 months?

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



The level of regional travel openness has further space to grow, with 46% of respondents reporting no travel within the region in the past 12 months, on average. Montenegro, Serbia, and Albania emerged as the most frequently visited destinations within the region, while Bosnia and Herzegovina and Kosovo* received the fewest visitors from other regional economies. Notably, Albania surpassed Serbia as the economy with the highest proportion of respondents who had not travelled abroad within the region, accounting for 66% of them. Additionally, Kosovo* recorded the highest percentage of survey participants who had travelled to another regional economy, with 79% having visited Albania.

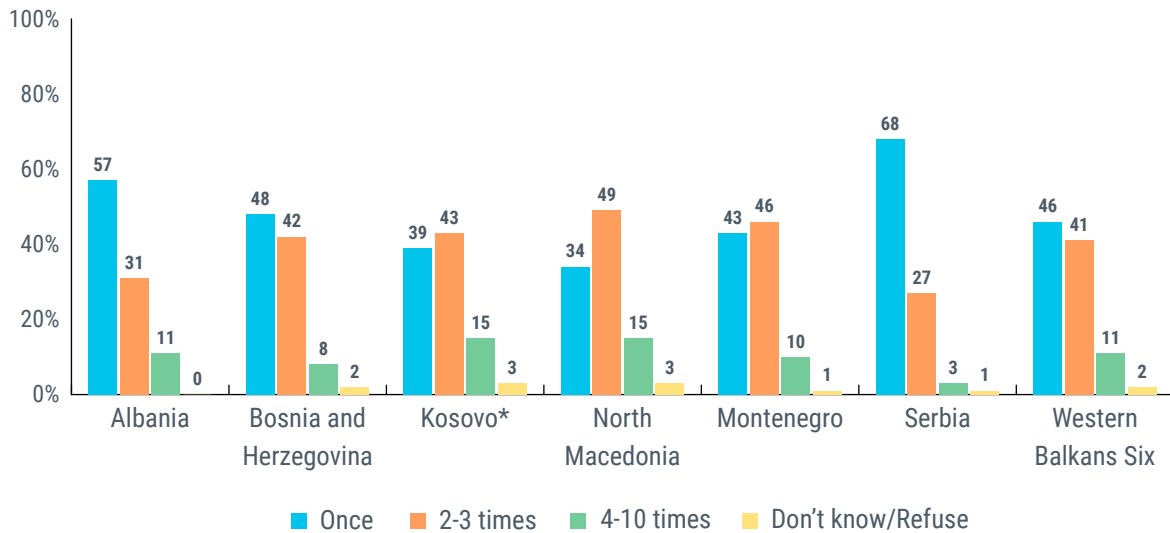


FIGURE 41

Your Travels to Western Balkans Six: Total Trips in the Past 12 Months

Q10. [S] Approximately how many times in total did you travel to the Western Balkan economies during the past 12 months?

(Those who travelled in the region, n=3056, multiple answers, %)



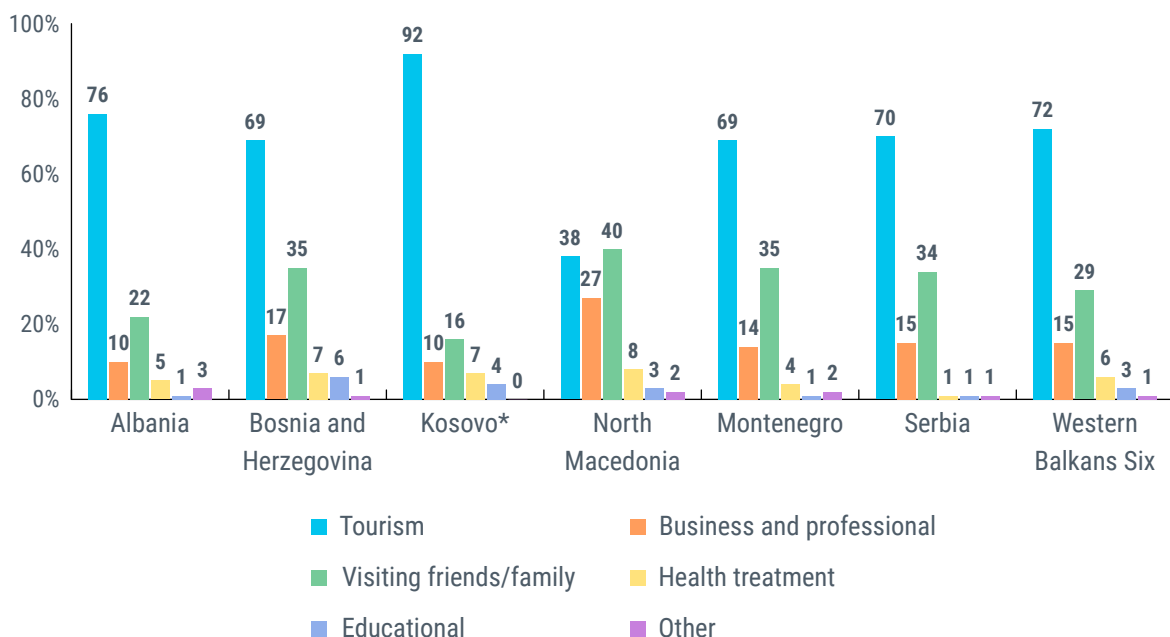
Tourism is the main reason for travel within the Western Balkans Six, driven by proximity and affordability, making it attractive to budget-conscious travellers seeking diverse cultural experiences nearby. Many respondents travelled only once in the past year, influenced by factors like distance, interests, or logistical challenges. Kosovo* showed a more even spread, with significant numbers visiting 2-3 times annually. Serbia had the lowest frequency of intra-regional travel, while Montenegro saw the highest rates of travel within the region.

FIGURE 42

The purpose of Travels

Q11. [M] What was the purpose of this/these travel(s)?

(Those who travelled in the region, n=3056, multiple answers, %)





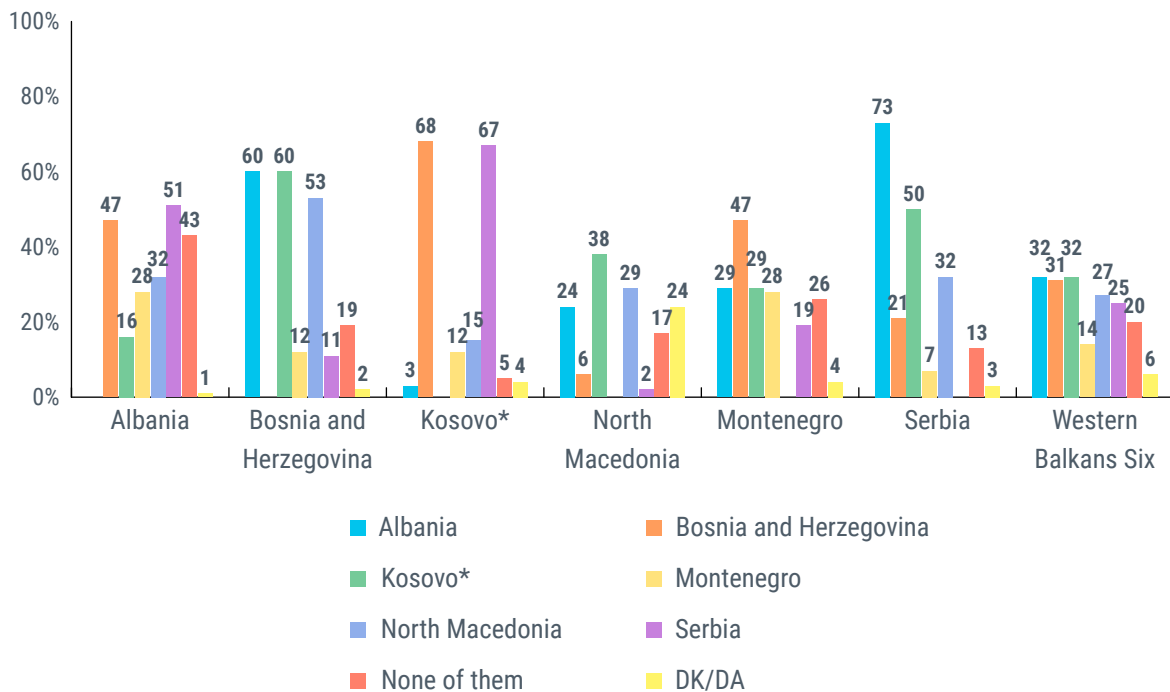
Tourism dominates intra-regional travel across the Western Balkans Six, comprising nearly three-quarters of all intra-regional travel. Albania and Kosovo* stand out with the highest proportions of tourism-related travel, highlighting the appeal of neighbouring destinations to tourists. Educational travel remains limited across all economies, with Bosnia and Herzegovina showing the highest percentage. Visiting family and friends is another common reason for travel, notably in Montenegro and North Macedonia, indicating strong social ties within these economies. Health-related travel constitutes a minor portion of intra-regional travel, suggesting it has little impact on travel patterns in the region.

FIGURE 43

The economy in the Western Balkans Six the respondents never visited

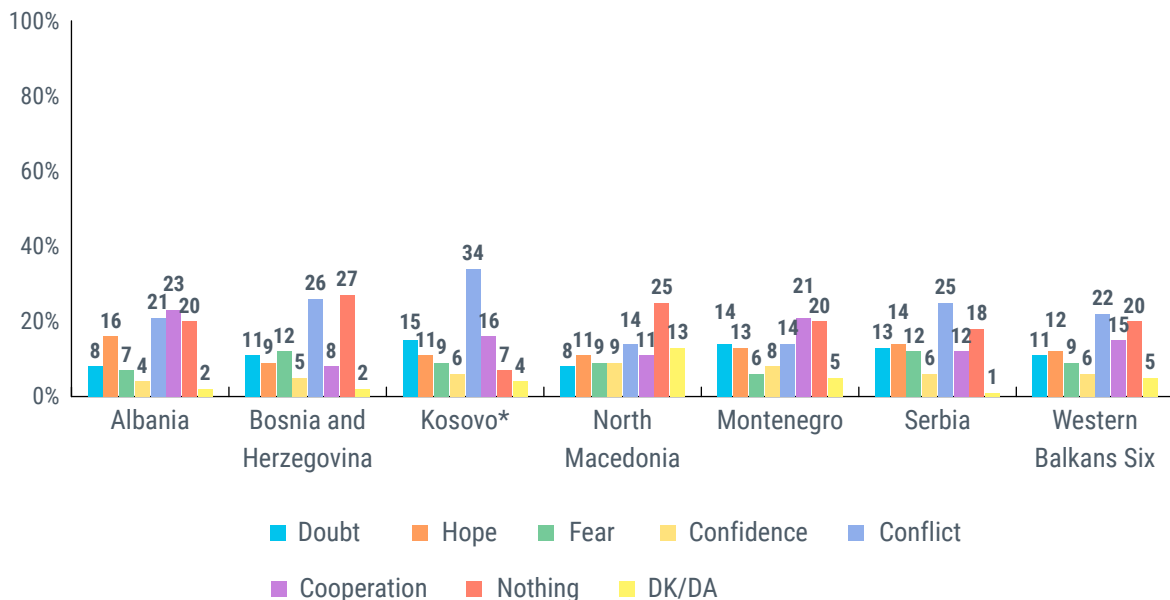
Q12. [M] Which of the Western Balkan economies have you never visited?

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



Regarding openness to visitors from neighbouring economies in the Western Balkans Six, there is a consistent pattern observed across the region, as shown in the figure above. Nearly one third of respondents in the Western Balkans Six have not visited Albania, Bosnia and Herzegovina, and Kosovo*, and fewer respondents have never visited Montenegro. The figure illustrates varying levels of interaction between these economies, with notably few respondents from Kosovo* not having visited Albania, contrasting sharply with the high percentage of respondents from Serbia who have not visited Albania. Overall, a small percentage of respondents indicate they have not visited any economy in the region.

FIGURE 44 **First feeling when you think about Western Balkans Six**
Q13. [S] When you think of the Western Balkans, what is the first feeling that comes to your mind?
(All respondents, N=6000, multiple answers, share of total, %)



When asked about their feelings towards the WB6, respondents expressed a range of emotions. Many associated the region with conflict. Similarly, a significant number reported feeling indifferent. On the positive side, some expressed hope, confidence, and a sense of cooperation, showing optimism about the area.

Kosovo* had the highest association with conflict, followed by doubt. Bosnia and Herzegovina also saw a substantial perception of conflict. Conversely, Bosnia and Herzegovina and Montenegro had the highest percentages of respondents feeling “nothing” towards the region. Albania showed a cooperative stance, with a notable proportion expressing hope. Serbia also demonstrated optimism, with more respondents feeling hopeful than fearful.

The findings highlight varying sentiments towards the Western Balkans Six, with shifts noted compared to the previous year, which stakeholders should consider in their strategies and communications.

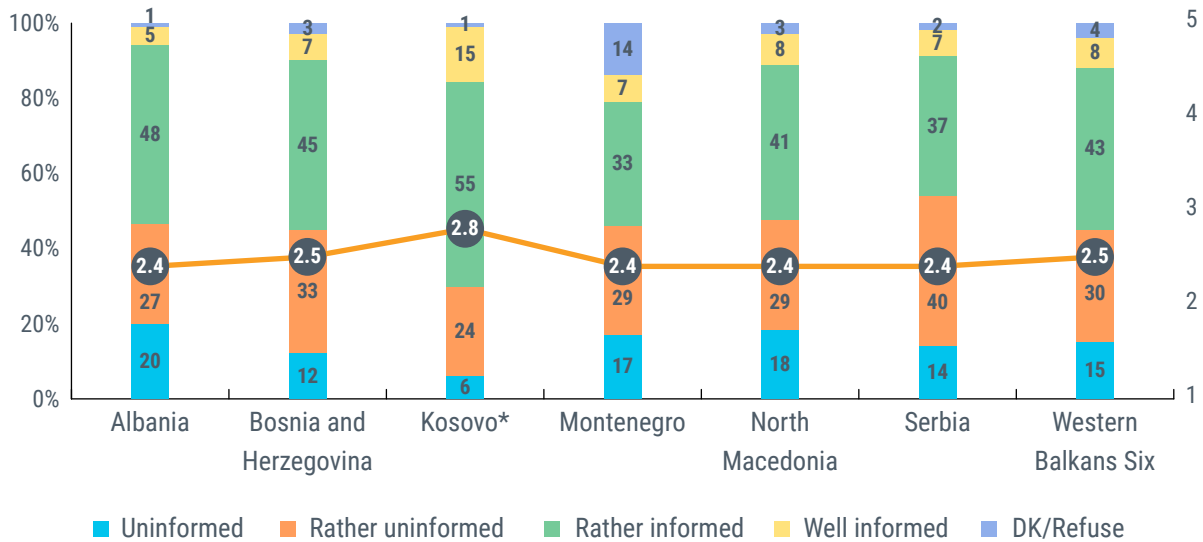


FIGURE 45

Awareness Levels: Understanding the Situation and Developments in the Western Balkans Six

Q14. [S] How informed would you say you are about the general situation and developments in the Western Balkans?

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



In the assessment of awareness about current affairs in the Western Balkans Six, perceptions vary significantly amongst respondents. While a notable segment of respondents indicated they are informed (51%), a substantial portion (45%) expressed a lack of awareness about ongoing developments. Understanding these nuanced views is crucial for assessing engagement and knowledge levels within these economies. Overall, there is a positive sentiment towards staying informed about regional affairs.

However, there are disparities amongst respondents from different economies.

- Kosovo* stands out with 70% of respondents claiming to be well-informed, suggesting a proactive approach to staying updated on regional matters.
- Albania and Bosnia and Herzegovina follow closely with 53% and 52% of informed respondents, respectively, indicating a significant portion of the population actively seeking information and staying engaged.



- Serbia has the highest number of self-reportedly uninformed respondents at 54%, presenting a notable contrast. Similarly, Montenegro and North Macedonia also show relatively high percentages of respondents who are uninformed, around 47%.

These disparities highlight the need for ongoing efforts to promote awareness and understanding of regional dynamics within the Western Balkans Six. Fostering an informed citizenry can help these economies navigate challenges and capitalise on opportunities for growth and cooperation within the region more effectively.

FIGURE 46

Improved Relations? The State of Western Balkans Six Compared to 12 Months Ago

Q15. [S] Do you agree that the relations in the Western Balkans IN GENERAL are better now than 12 months ago?

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

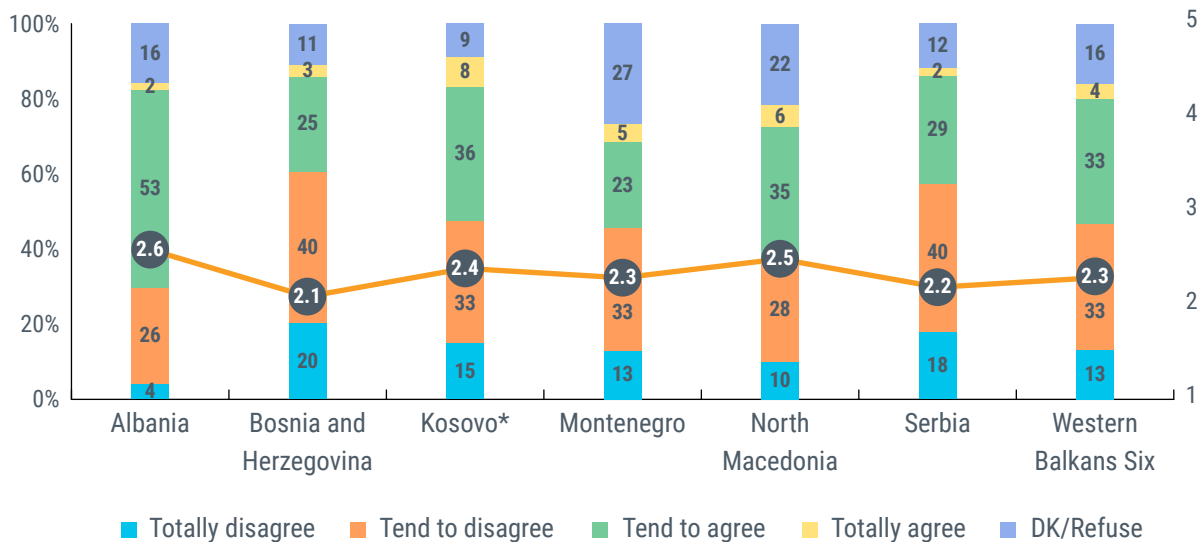


Figure 46 captures how respondents perceive changes in relations amongst Western Balkan economies. Overall, opinions are split: a notable portion disagree with any observed improvement in these relations over the past year, while others see positive changes or remain undecided. The mean satisfaction score for these responses is moderate (2.5/5).

Albania stands out with a more optimistic outlook compared to the region. A majority of respondents there acknowledge improvements in economic relations, resulting in a higher mean satisfaction score. Similarly, North Macedonia shows a trend towards optimism about improvements. Conversely, Bosnia and Herzegovina and Serbia show more scepticism. A significant proportion of respondents in these economies express dissatisfaction with the perceived improvements, although many remain cautious in their assessments.



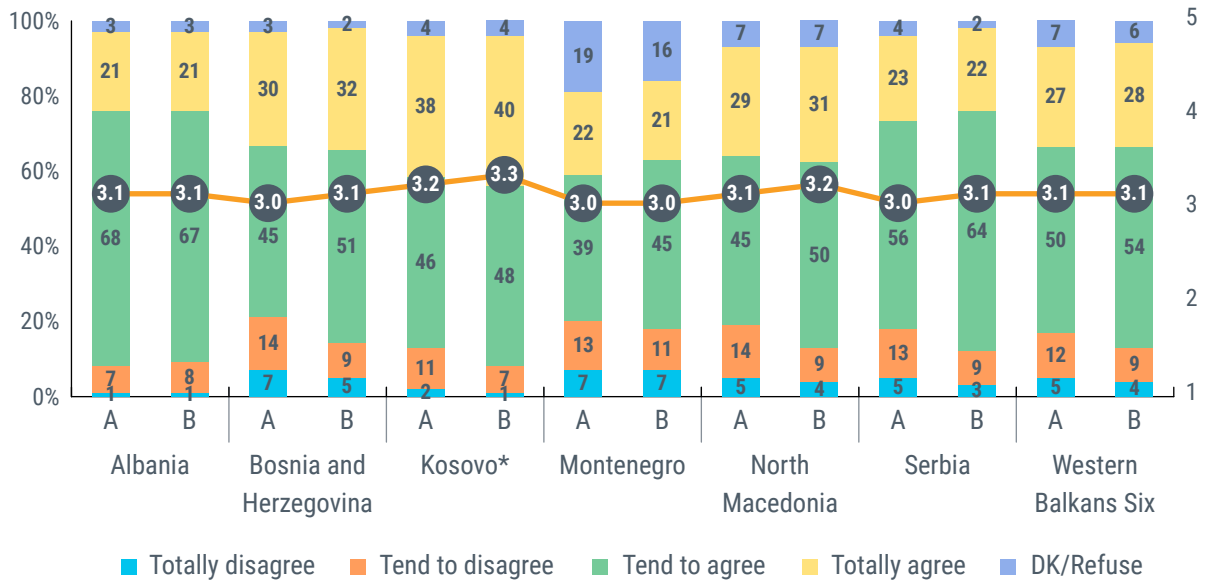
FIGURE 47

Unity over Division: Strengthening Western Balkans Six through Regional Cooperation

Q16. A. What brings Western Balkan citizens together is more important than what separates them.

B. Regional cooperation can contribute to the political and economic situation, wellbeing of Western Balkan people and security situation of [ECONOMY]

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



Trust in regional cooperation is stronger across the region. The overall perception of its role is pivotal for the political, economic, and overall well-being and security of Western Balkans Six residents. Compared to 2023 BBPO, more individuals believe in regional cooperation, and most importantly less respondents doubt the benefits of regional cooperation for the region’s economies.

In this Barometer, almost 4 out of 5 respondents prioritise what unites Western Balkans Six respondents over what divides them, and only 1 out of 10 respondents thought the opposite. The Barometer reveals significant enhancement throughout the region compared to last year, signalling continued backing for regional cooperation.

Albania exhibits the strongest endorsement of cooperation amongst Western Balkan economies, with 90% of respondents strongly supporting both statements and encountering minimal opposition. Kosovo* and Serbia follow closely with similar agreement rates.



FIGURE 48

Unity over Division: Western Balkans Six' Shared Value
Q16. A What brings Western Balkan citizens together is more important than what separates them.
 (All respondents, N=6000, scale from 1 to 4, share of total, %, mean)

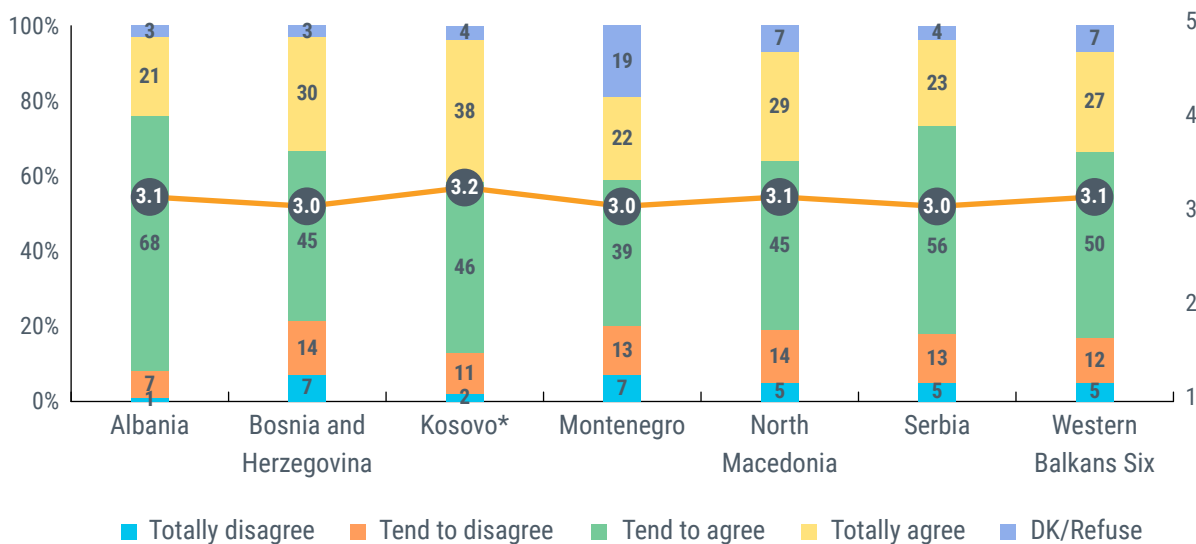


FIGURE 49

Regional Cooperation: A Pillar for Prosperity in the Western Balkans Six
Q16. B. Regional cooperation can contribute to the political and economic situation, wellbeing of Western Balkan people and security situation of [ECONOMY]
 (All respondents, N=6000, scale from 1 to 4, share of total, %, mean)

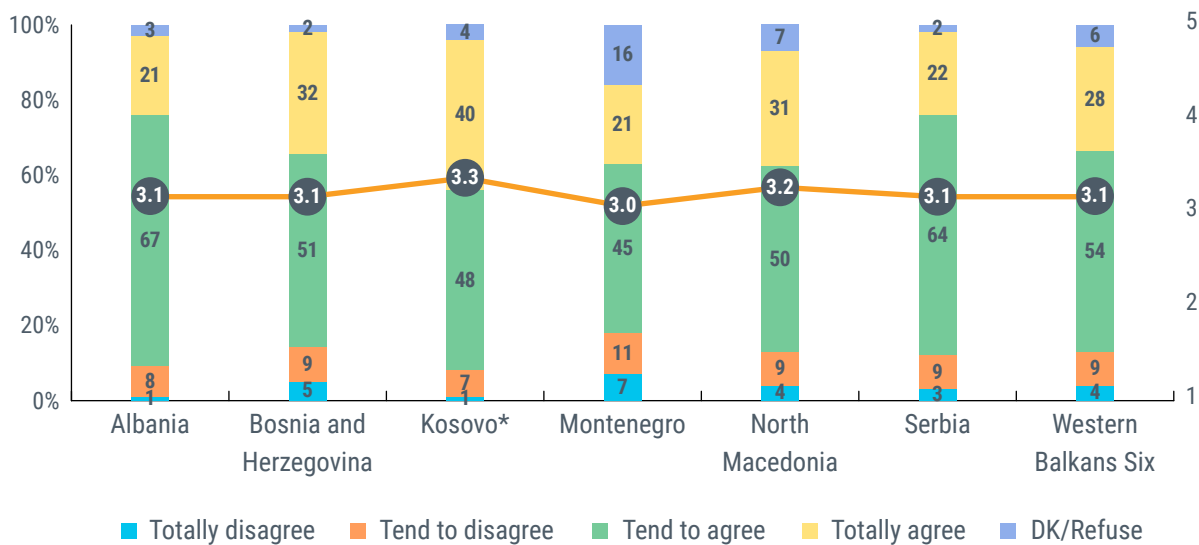


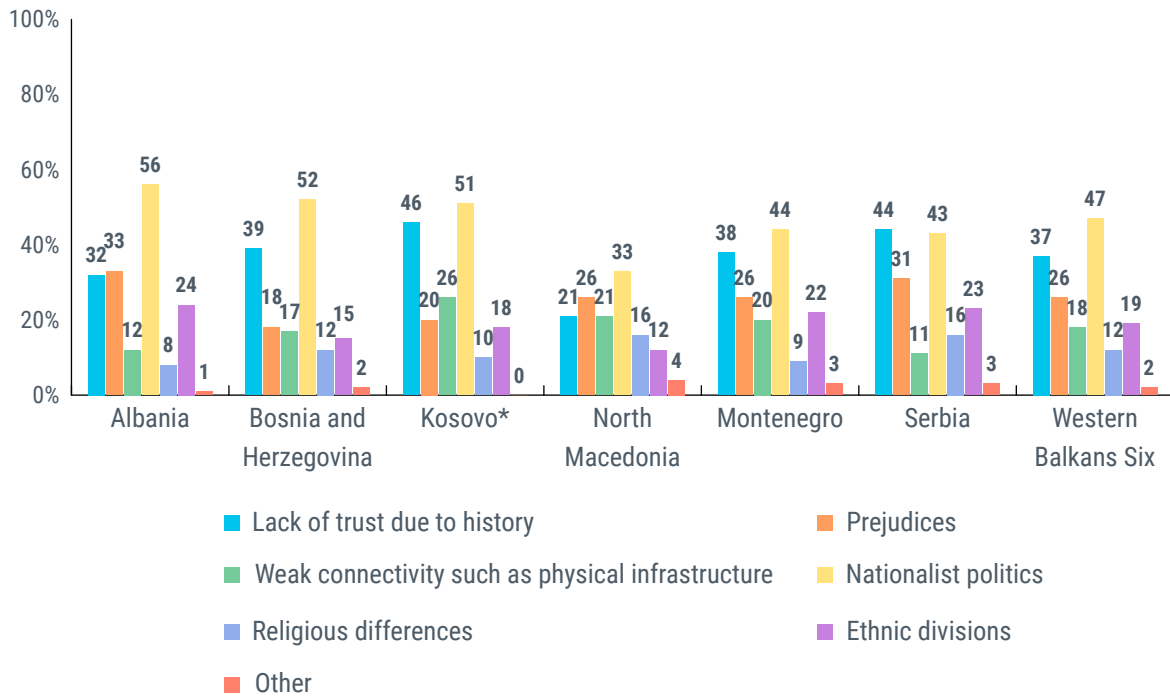


FIGURE 50

Barriers to Unity: Challenges in Regional Cooperation amongst Western Balkan Economies

Q17. [M MAX=2] In your opinion, what hampers regional cooperation between Western Balkan economies?

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



Across the region, respondents identify several primary barriers to cooperation: nationalist politics, lack of trust rooted in historical grievances, prejudices, and ethnic divisions. Nationalist politics stands out as the most significant barrier, notably highlighted by respondents from Albania, Bosnia and Herzegovina, and Kosovo*. These economies perceive nationalist politics as a major obstacle, reflecting ongoing challenges in fostering regional collaboration. Additionally, lack of trust due to historical tensions is prominently cited by respondents in Kosovo*, Serbia, and North Macedonia, underscoring deep-seated complexities within these relationships. Overall, the responses underscore shared challenges amongst neighbouring economies in overcoming historical animosities and political divisions.



FIGURE 51

Evaluating Trade Strength

Q18. [S] Would you say that trade and economic links in general between [ECONOMY] and other Western Balkan economies are very weak, rather weak, neither weak nor strong, rather strong or very strong?

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

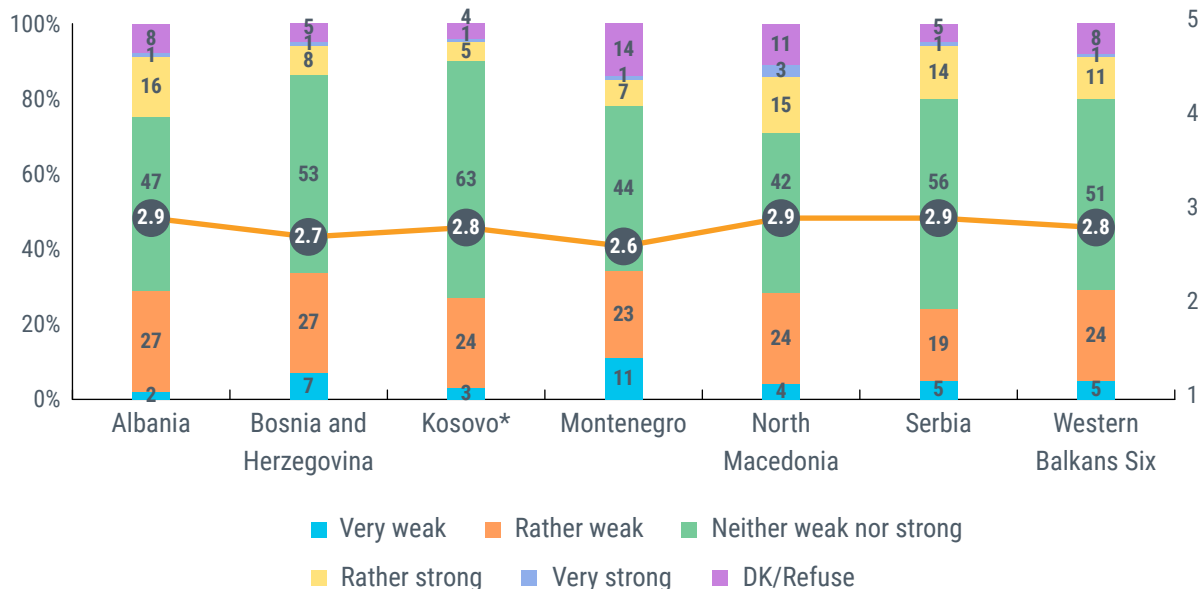


Figure 51 illustrates how respondents in the region perceive the strength of trade and economic ties amongst Western Balkan economies. A significant portion of respondents feels neutral about these ties, indicating neither strong nor weak connections. Some express agreement, but a notable number consider the links to be weak.

Respondents in Kosovo* stand out with the lowest agreement rate and a majority viewing the links as neutral, showcasing varied perspectives within the region. Respondents in Montenegro also shows a low agreement rate and a substantial group perceiving the ties as weak. Overall, the data suggests mixed views on the strength of trade and economic connections amongst Western Balkan economies, highlighting areas where collaboration and enhancement could be beneficial.

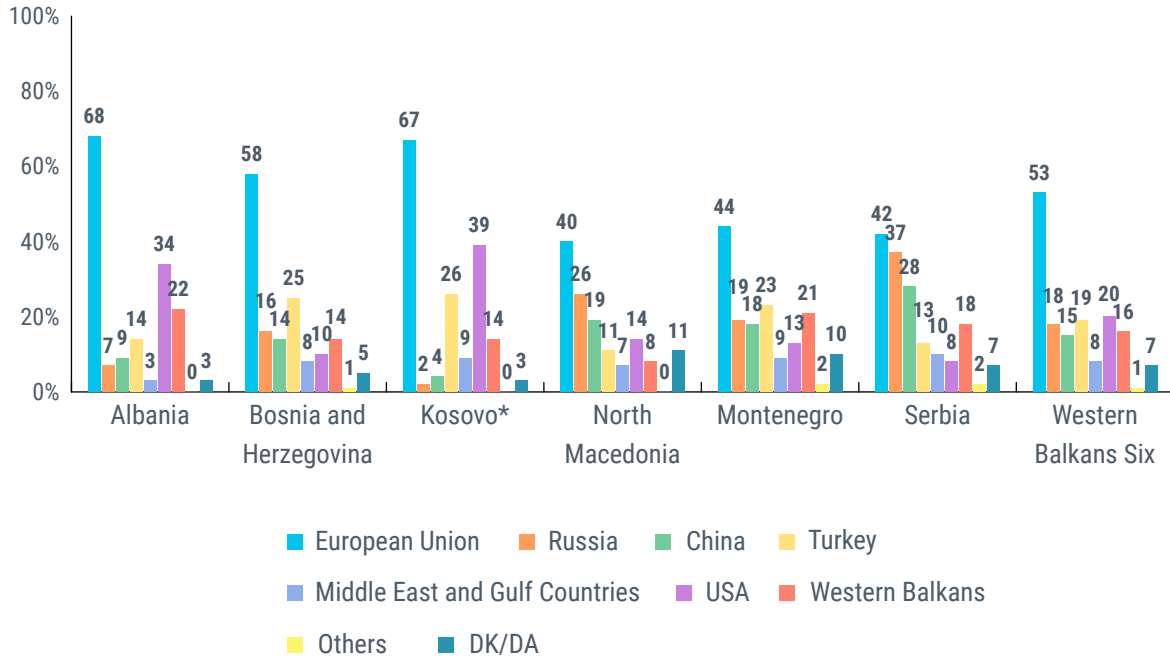


FIGURE 52

Top Trade Targets: Priorities for Enhancing Trade and Investment Relations

Q19. [M MAX=2] Which economies/regions do you think your government should further improve trade and investment relations with?

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



Respondents from the Western Balkans express a clear preference for enhancing trade and investment relations with certain regions. A majority believe that strengthening ties with the European Union would be most advantageous, followed by preferences for the United States, Türkiye, and Russia.

There is a notable consensus amongst respondents from Albania, Kosovo*, and Bosnia and Herzegovina on prioritising trade and investment with the European Union. Respondents in Kosovo* and Albania also recognise the potential benefits of enhancing relations with the USA. Conversely, respondents in Serbia view improving relations with the EU, Russia, and China as beneficial for the regional economy. Respondents from Montenegro show a similar preference, while respondents in Bosnia and Herzegovina and North Macedonia align somewhat less strongly with these preferences.

Middle Eastern and Gulf economies are also perceived as significant potential trade and investment partners across the region, garnering consistent attention.

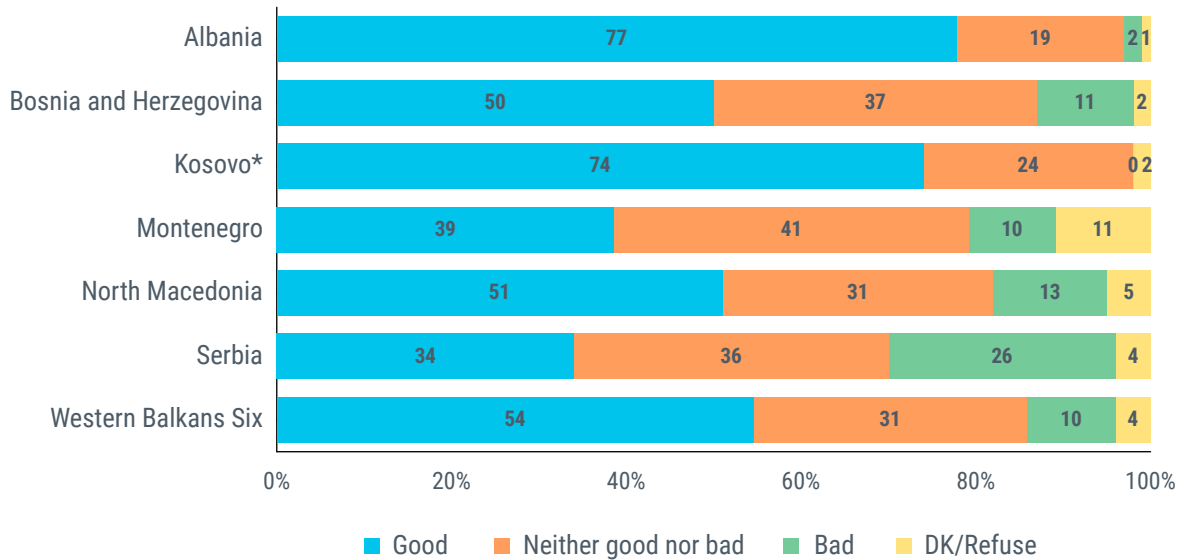


FIGURE 53

EU Membership: Weighing the Impact

Q20. [S] Do you think that EU membership of [ECONOMY] would be good, neither good nor bad, or bad?

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



The graph illustrates personal expectations of respondents from the Western Balkans Six regarding the potential benefits of EU membership. 54% of respondents believe EU membership would be a good thing for the economy they belong to, while 10% remain sceptical about their economy's prospects for joining the EU. For the second year in a row, there is a decline in the support to EU membership by 5 percentage points across the Western Balkans Six, reflecting fatigue from a considerably extended process.

The landscape is slightly changed from the last Barometer, as there is a shift in opinions in Albania, Kosovo*, and Montenegro. Although respondents in Albania still lead amongst the Western Balkans Six in the unwavering support to EU membership, with a substantial 77%, there is decline by 15 percentage points from the 2023 Barometer. Respondents in Kosovo* have stepped up support to 74%, an additional 8 percentage points compared to last year. The rest of the economies hover around the same support level. However, there is another major shift in Montenegro with a 26-percentage point decline, from the third most supportive economy of EU membership to the fourth, reaching levels like the unchanged ones in Serbia.

There is a minor change in the scepticism to EU membership, remaining notable amongst the respondents from Serbia, and similar to last years' numbers for Albania, North Macedonia, and Montenegro. The only economies where less respondents express scepticism are Kosovo* and Bosnia and Herzegovina.

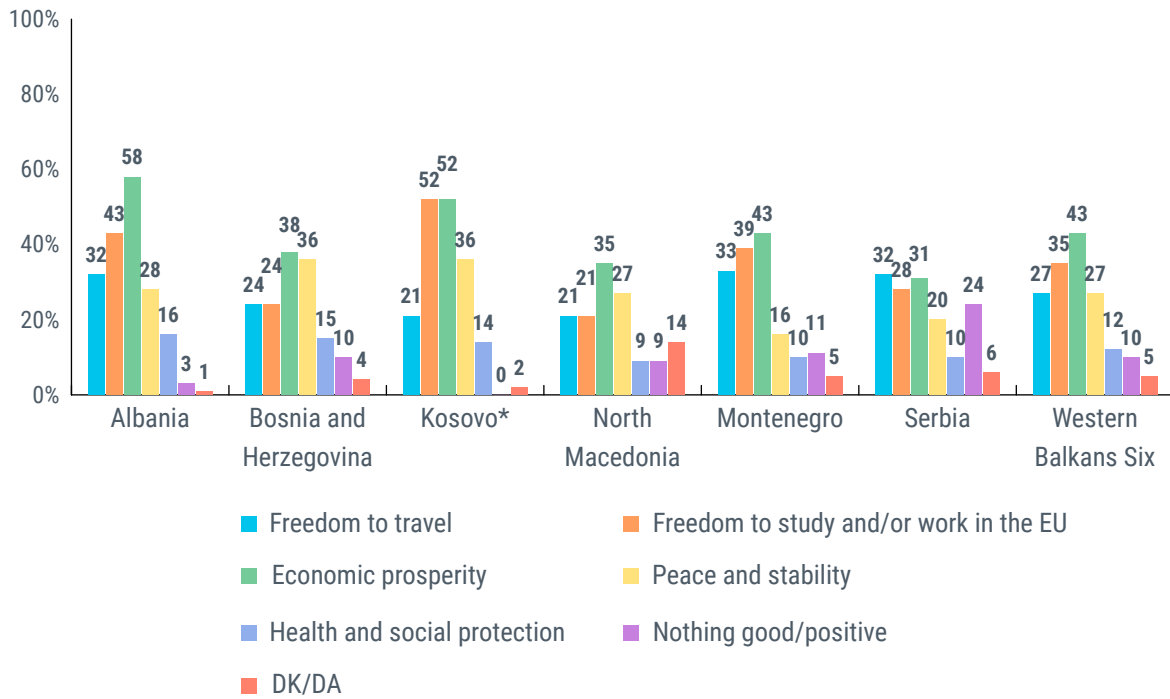


FIGURE 54

EU Membership: What It Means for You Personally

Q21. [M – MAX=2] What would EU membership mean to you personally?

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



Potential implications of EU membership are perceived differently amongst Western Balkan economies. Economic prosperity, the freedom to study and work in the EU, and the freedom to travel are identified as the most anticipated benefits. In Albania, the anticipation for economic prosperity is particularly pronounced, with 3 out of 5 respondents expressing optimism about the opportunities EU membership could bring. Bosnia and Herzegovina highlights an additional expectation: peace and stability, equally emphasized in Kosovo*. Moreover, there is a strong desire amongst respondents, especially from Kosovo*, Albania, and North Macedonia, for the freedom to study and work in the EU. This underscores the region’s aspiration for increased mobility and access to educational and employment opportunities within the EU framework.

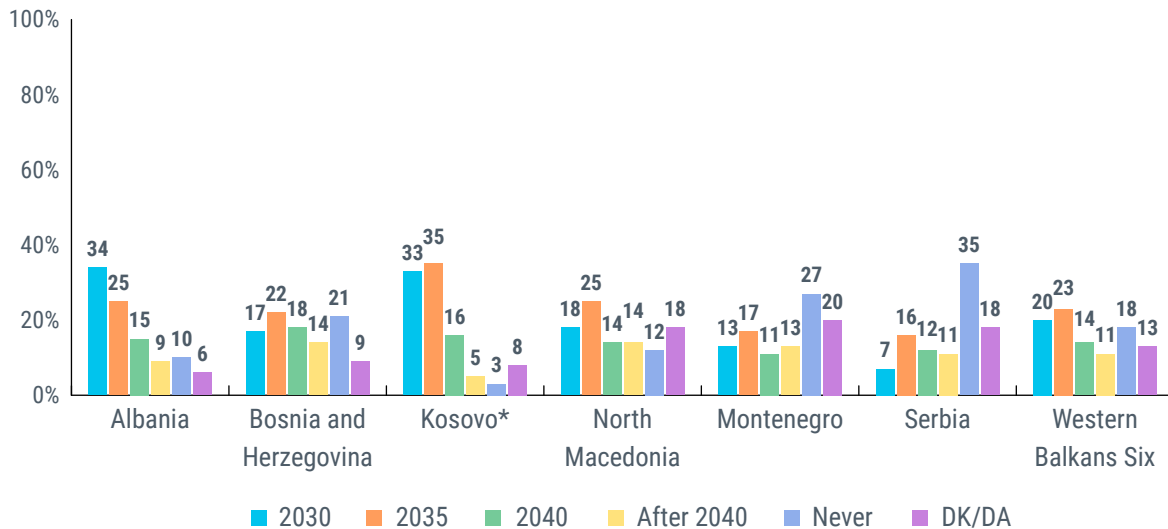


FIGURE 55

Future EU Membership: When Will Respondents Join

Q22. [S] Would you say that [ECONOMY] will become a member of the EU by the year 2030, 2035, 2040, after 2040 or it will never become a member?

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



Opinions across the region vary significantly regarding the expected timeline for achieving EU membership. While a notable portion anticipates accession by 2030 (20%) or slightly later by 2035 (23%), fewer respondents now believe their economy will never join the EU compared to 2023.

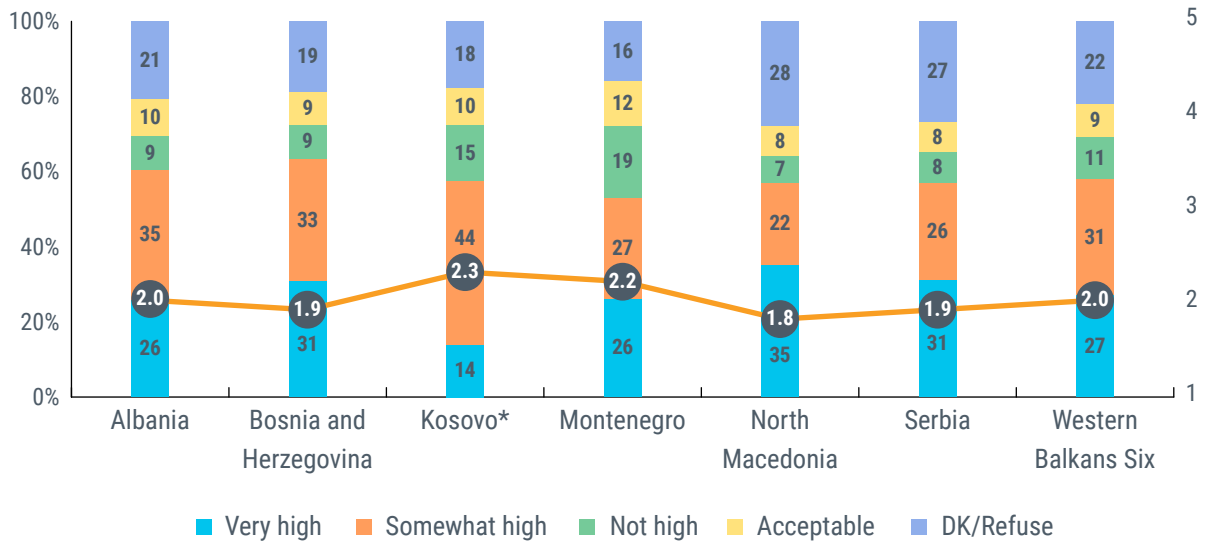
Respondents in Kosovo* and Albania show the highest confidence levels, with a combined 68% and 59% respectively expecting EU membership by 2030 or 2035. Respondents in Albania are notably optimistic, with 34% foreseeing accession before 2030, followed closely by Kosovo* at 33%. Conversely, respondents in Serbia present the lowest optimism, with only 7% expecting membership before 2030 and a significant 35% believing their economy will never join the EU, the highest proportion in the region. Bosnia and Herzegovina and North Macedonia also express uncertainty, with smaller percentages expecting accession before 2030 and notable segments considering the possibility of never joining the EU. Despite Albania's strong support for EU membership, a minority (10%) remains doubtful about meeting accession criteria.



FIGURE 56

Roaming Realities: Assessing Phone Costs When Traveling to the EU Q23. [S] How would you consider roaming/phone costs when travelling to EU?

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



In the Western Balkans Six, majority of respondents perceive telecom costs with the EU as high or very high, marking a 6-percentage point increase from 2023. Conversely, only a small fraction find these charges acceptable, while a significant portion refrains from forming an opinion on the matter. North Macedonia is particularly critical of EU travel-related phone costs, with Serbia and Montenegro also expressing similar concerns.



DIGITAL TOOLS AND THE INTERNET

FIGURE 57

Daily Digital Dive: How Many Hours Do You Spend Online?
Q24. [S] Approximately how many hours per day do you spend on Internet (e.g. on social media, web browsing, online shopping, etc.)?
(All respondents, N=6000, multiple answers, share of total, %)

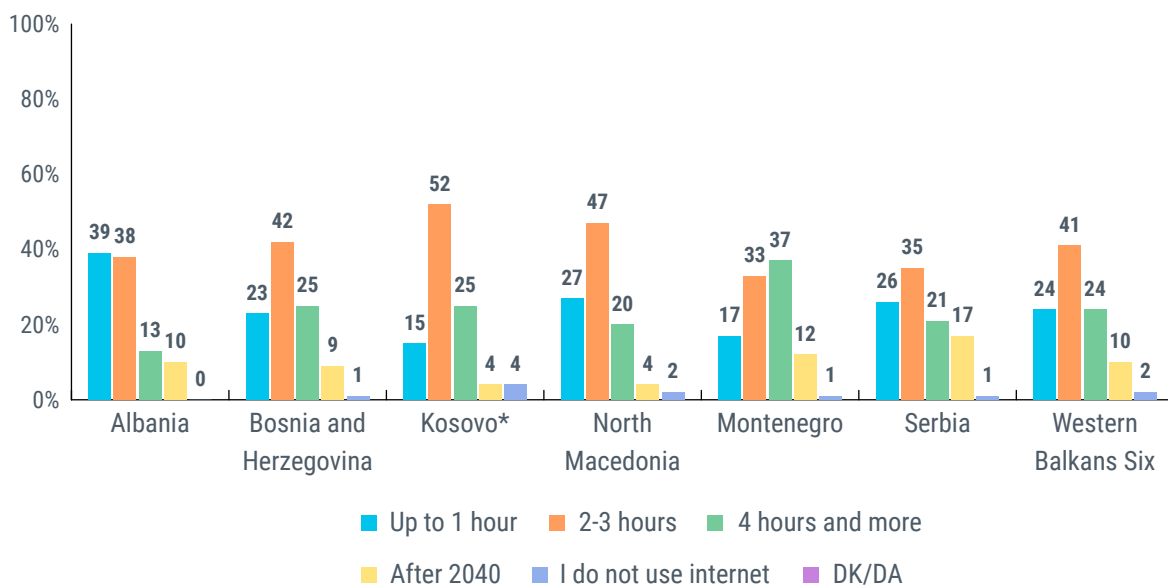


Figure 57 indicates varied internet usage patterns amongst respondents. A significant number dedicates 2-3 hours daily online, with Kosovo* notably leading in this activity compared to other economies. Conversely, respondents from Albania and Serbia show lower engagement, with a notable portion spending one hour or less per day on the internet, and a small percentage reporting no internet usage.

From a regional perspective, the age group between 25 and 34 shows the highest internet usage, spending considerable time online (Figure 58). Similar patterns are observed in the 35-44 and 45-54 age groups. In contrast, respondents aged 65 and above display significantly lower internet usage, with a notable portion reporting no internet use at all. This highlights a clear digital divide across different age groups in the region.



FIGURE 58

Screen Time Snapshot: Daily Hours Spent Online

Q24. [S] Approximately how many hours per day do you spend on Internet (e.g. on social media, web browsing, online shopping, etc.)?
(All respondents, N=6000, multiple answers, share of total, %)

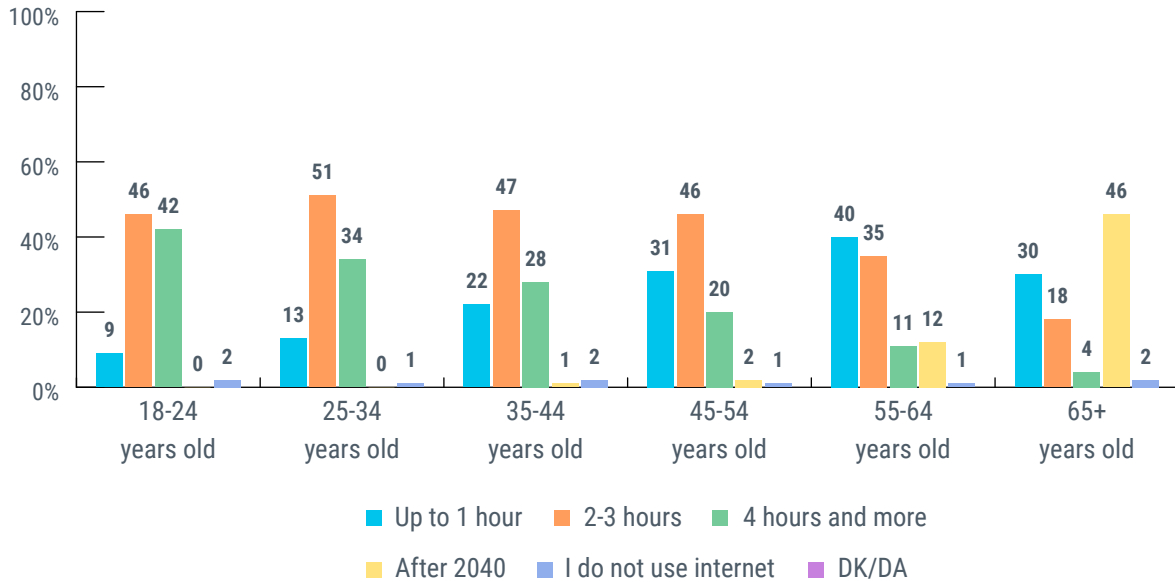
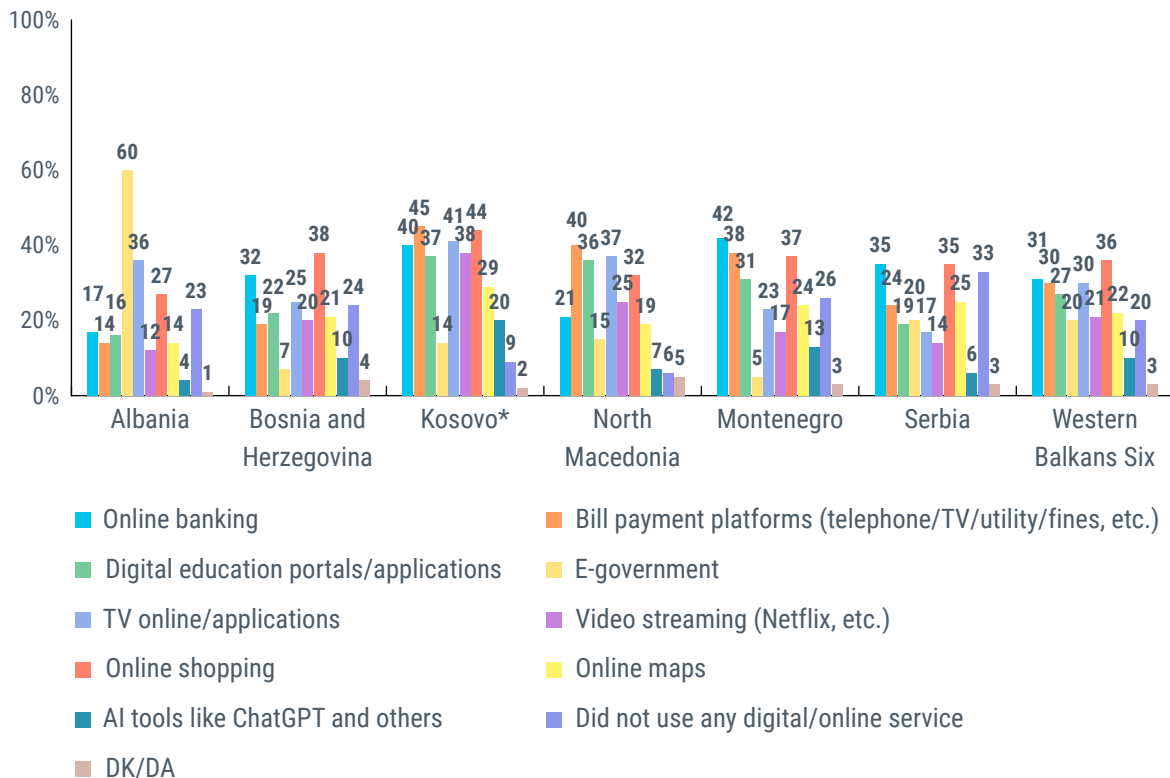


FIGURE 59

Your Digital Footprint: Online Services Used in the Past Year

Q25. [M] Which digital/online services have you used in the last 12 months?
(All respondents, N=6000, multiple answers, share of total, %)



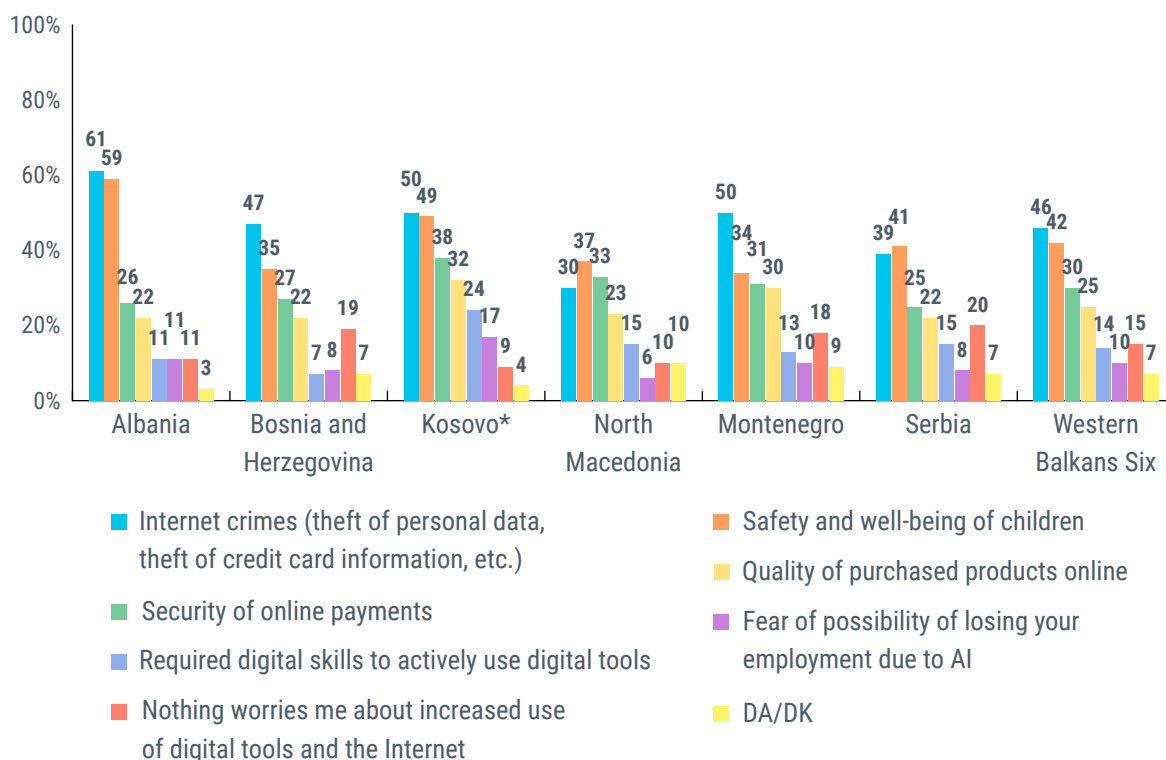


Digital and online services, along with their associated infrastructure, have become integral to daily life of respondents across the Western Balkans Six. In Albania, e-Government services, online TV applications, and bill payment platforms are widely used. Similarly, in Bosnia and Herzegovina, digital education portals and online TV applications are commonly accessed, with a notable portion not using any digital services. Kosovo* stands out for its high usage of online bill payment platforms and other services such as online shopping and online banking. Montenegro shows significant usage of bill payment platforms, TV applications, and digital education services. In North Macedonia, online banking, bill payments, and online shopping are frequently used. Serbia reports notable usage of online banking and online shopping, with a significant portion of respondents not using digital services. Overall, across the Western Balkans Six, there is diverse engagement with digital services. Online shopping, online banking, bill payment platforms, TV applications, and digital education portals all see considerable usage, albeit with economy-level variations.

FIGURE 60

Digital Dilemmas: Top Concerns about Rising Internet Use Q26. [M] What worries you most about the increased use of digital tools and the internet?

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



In Albania, the primary issues surrounding digital tools and the internet revolve around internet crimes and the safety of children. Concerns about the quality of online purchases and the need for digital skills are comparatively lower. Similarly, in Bosnia and Herzegovina, internet crimes and child safety are the top worries, followed by concerns about online payment security and product quality. Kosovo* shares similar concerns about internet crimes and child safety, with additional focus on online payment security and product quality. In Montenegro and Serbia, child safety stands out as the predominant concern.

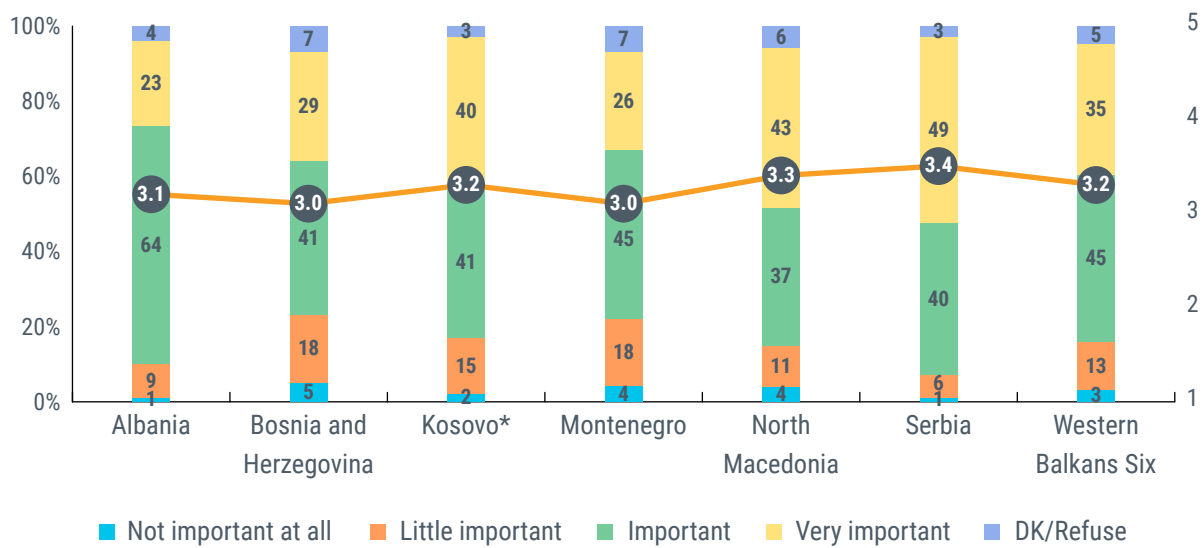


Overall, across the Western Balkans Six, the most frequent concerns relate to internet crimes and child safety. Issues concerning online payment security and product quality also feature prominently. However, worries about the need for digital skills and potential job displacement due to digital tools are less commonly cited. Interestingly, a small percentage in each economy indicated that they do not have any concerns about the increased use of digital tools and the internet.

FIGURE 61

Digital Skills: Essential for Success in Today's Workforce? Q27. [S] Would you say that digital skills are very important, important, little important or not important at all for success in today's workforce?

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



The Western Balkans Six has rapidly embraced new digital tools and technologies, although significant challenges persist. Across the region, there is a strong recognition of the value of digital skills in today's workforce, with approximately 80% of respondents acknowledging their importance. In contrast, only about 16% do not consider digital skills significant. Serbia and Albania top the list, with a wide majority valuing digital skill, and a minority dismissing their importance. Similar positive sentiments are observed in Kosovo*, North Macedonia and Bosnia and Herzegovina. Notably, Bosnia and Herzegovina stands out with the highest percentage of respondents who do not perceive digital skills as important.



ATTITUDES TOWARDS MIGRATION AND MOBILITY

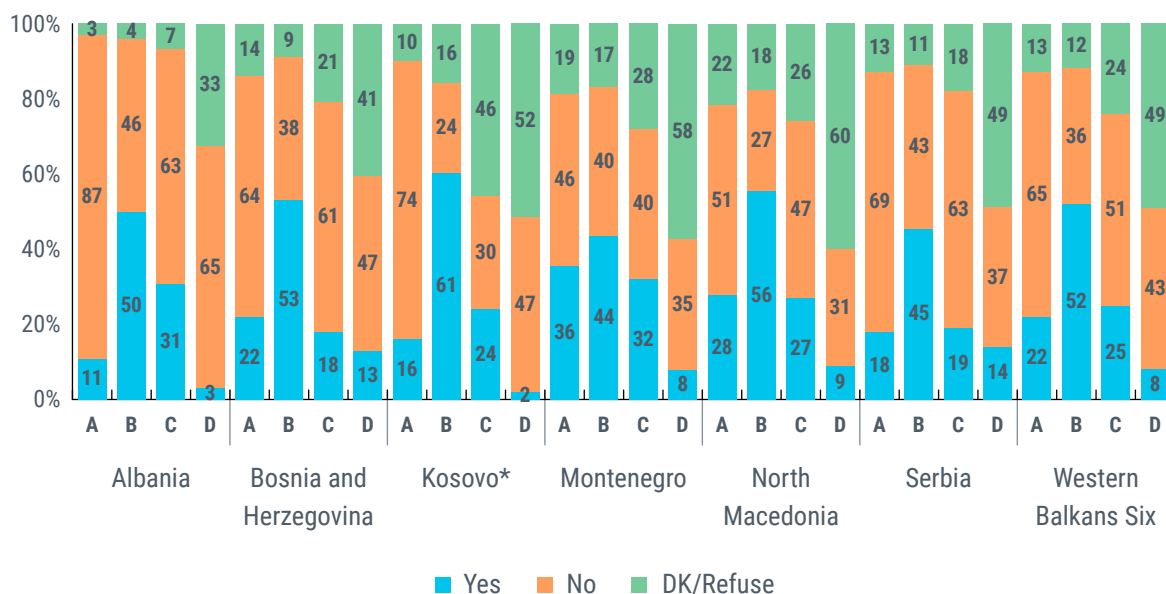
FIGURE 62

Dream Destinations: Where Do You Want to Live or Work Abroad in the Next Five Years?

Q28. [S] Would you like to go to live or work abroad for some time during the next five years and where would you prefer to?

- A. Western Balkans
- B. European Union
- C. United States
- D. Other

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



Mobility is a crucial issue in the region, with migration and demographic changes ranking amongst the top challenges for its economies. There is a strong regional preference for the EU as a destination for living or working abroad in the coming five years, overshadowing the desire to stay within the region. Across the board, a significant majority of respondents express a preference for working abroad in the EU, with Kosovo* showing particularly high interest, possibly influenced by longstanding visa requirements for EU travel. Respondents in Montenegro and Serbia, however, show the least preference for working in the EU, though not significantly different from the regional average.

Interestingly, respondents in the region generally favour working in the US over staying or working elsewhere in the Western Balkans Six. Montenegro and Albania have the highest percentages of respondents preferring to work in the US. There is also a notable variation in willingness to live or work within the region itself. Respondents from Albania show the least inclination, followed by Kosovo* and Serbia, whereas those from Montenegro and North Macedonia are most open to living or working elsewhere within the Western Balkans Six in the next five years.

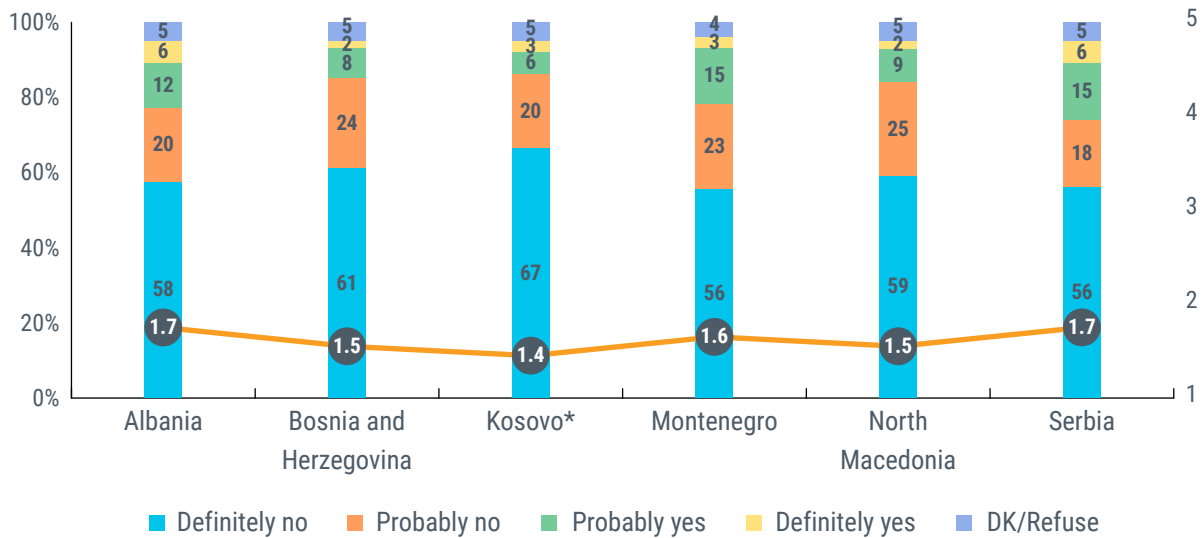


FIGURE 63

Exploring Opportunities: Considering Life and Work in the Western Balkans Six

Q29. [S] Would you consider living and working in one of the Western Balkan economies?

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



There is widespread reluctance amongst respondents in the Western Balkans Six to relocate for work or residence within the region. Kosovo* shows the highest proportion of respondents (87%) expressing disinterest, with only 9% inclined towards moving elsewhere within the region. This sentiment is similarly echoed across other economies, ranging from 84% in North Macedonia to 74% in Serbia, indicating a pervasive lack of enthusiasm. Perceptions for each economy regarding the likelihood of people relocating to live and work within the region are as follows:

- 78% of respondents from the region express hesitation about relocating to Albania, while approximately 18% show some degree of interest. Notably, Serbia registers the highest percentage of respondents (97%) expressing disinterest in moving to Albania, closely followed by Bosnia and Herzegovina with 87%. In contrast to other economies, respondents from Kosovo* (49%) display a comparatively higher level of receptiveness to the idea of relocating to Albania.
- About 85% of respondents from the region express hesitancy towards relocating to Bosnia and Herzegovina, while just 10% demonstrate willingness to consider such a move. Notably, Albania exhibits the highest percentage of respondents (94%) who are disinclined to move to Bosnia and Herzegovina, closely followed by Serbia with 90%. In contrast to the other economies, respondents from Montenegro (18%) appear comparatively more open to the idea of relocating to Bosnia and Herzegovina compared to the other economies.
- The graph illustrates the sentiments of respondents from Western Balkans Six economies regarding the prospect of living and working in Kosovo*, with a prevailing sense of caution evident in the overall responses. About 87% of respondents from the region express hesitation towards relocating to Kosovo*, while just 9% demonstrate willingness to consider such a move. Notably, Serbia exhibits the highest percentage of respondents (96%) who are disinclined to move to Kosovo*, closely followed by Bosnia and Herzegovina with 90%. This cautious stance reflects a common sentiment across the region, indicating significant barriers to relocation to Kosovo*.



FIGURE 64

Considering Albania: Is It the Right Place to Live and Work
Q29. [S] Would you consider living and working in one of the Western Balkan economies?

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

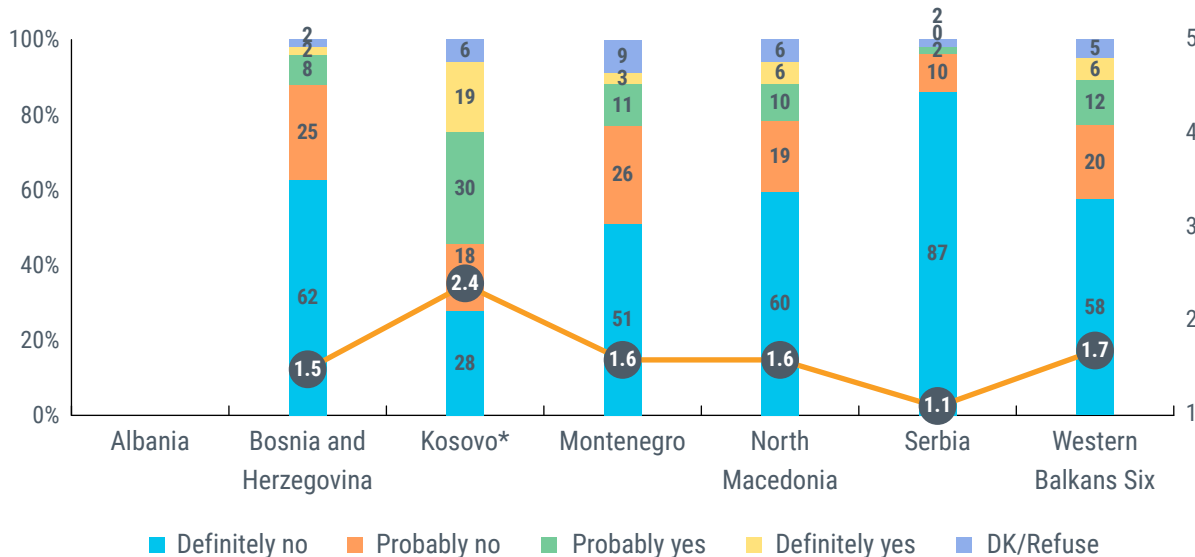
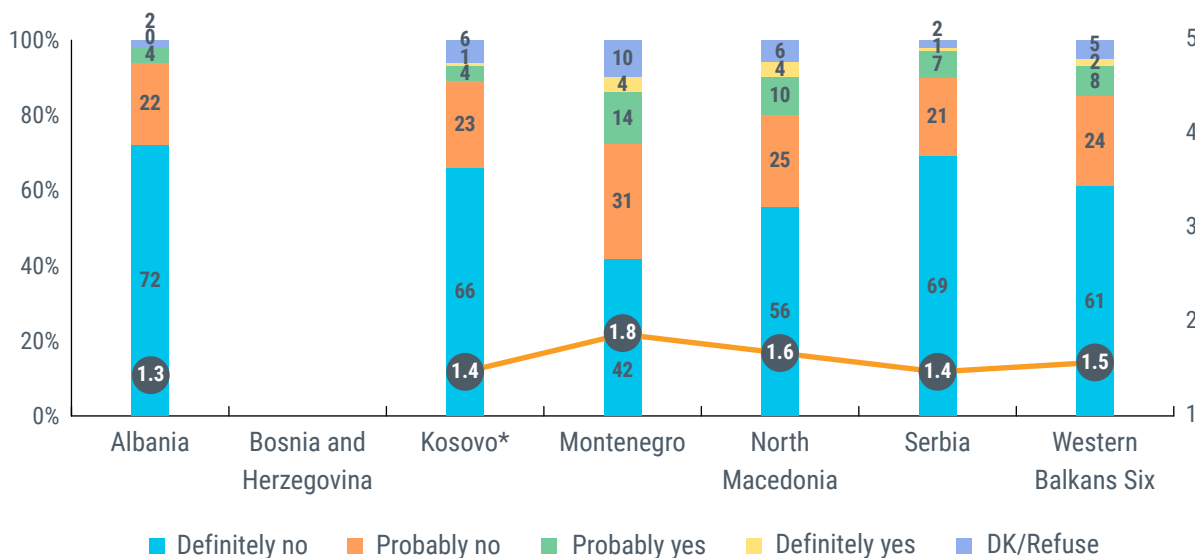


FIGURE 65

Considering Bosnia and Hercegovina: Is It the Right Place to Live and Work
Q29. [S] Would you consider living and working in one of the Western Balkan economies?

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



- Approximately 79% of respondents from the region show reluctance towards moving to Montenegro, while around 18% appear open to the idea. Notably, Albania emerges with the highest percentage of respondents (91%) expressing a lack of interest in relocating to Montenegro, closely trailed by Serbia at 83%. This cautious sentiment reflects a widespread trend throughout the region, indicating significant hurdles to potential relocation to Montenegro.



FIGURE 66

Considering Kosovo*: Is It the Right Place to Live and Work Q29. [S] Would you consider living and working in one of the Western Balkan economies?

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

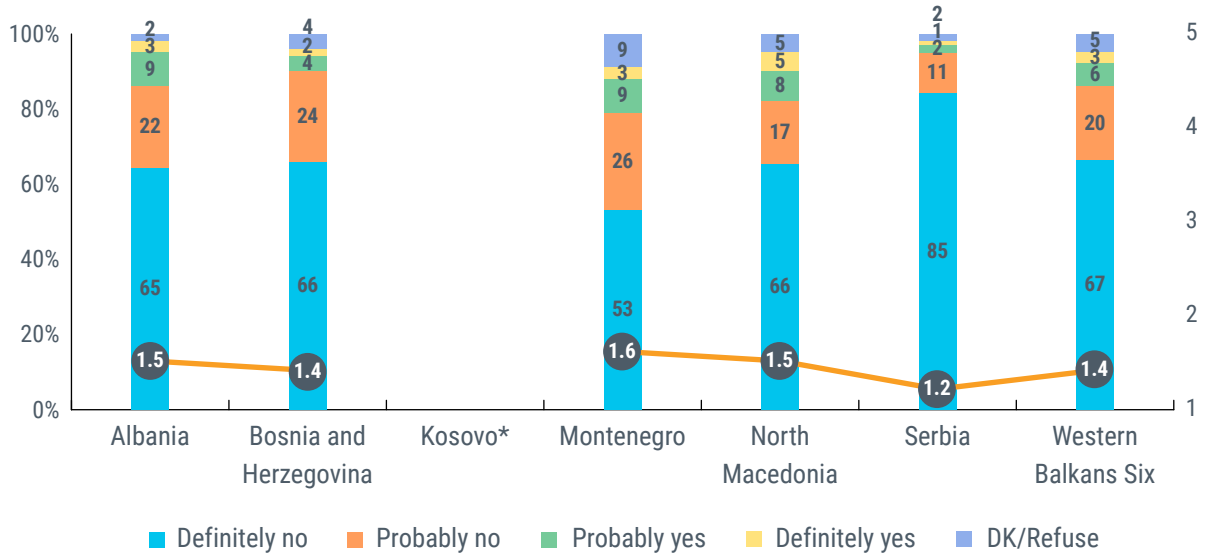
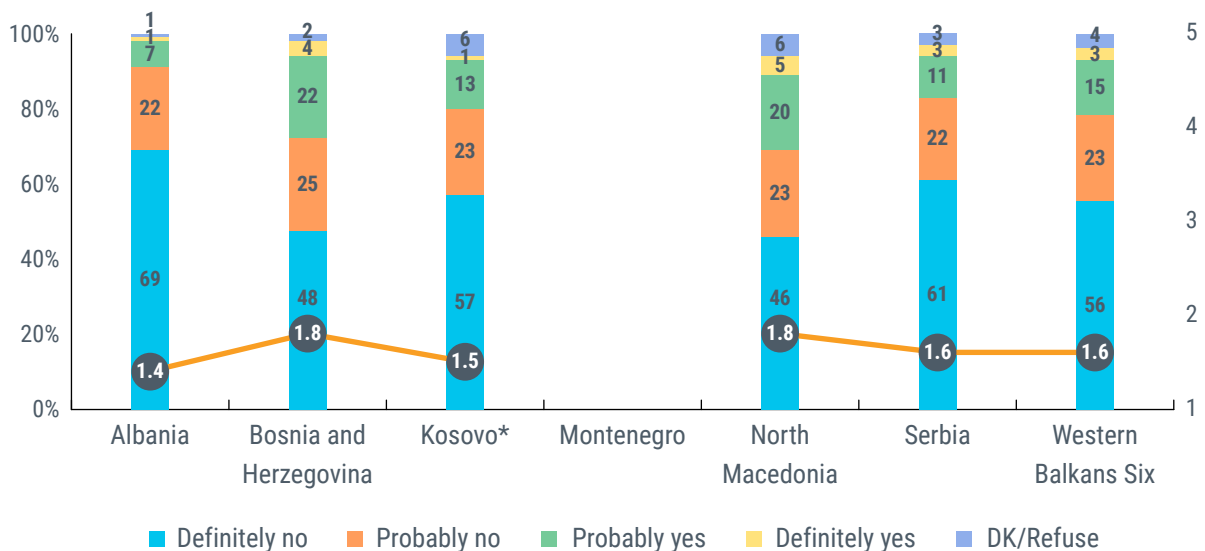


FIGURE 67

Considering Montenegro: Is It the Right Place to Live and Work Q29. [S] Would you consider living and working in one of the Western Balkan economies?

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



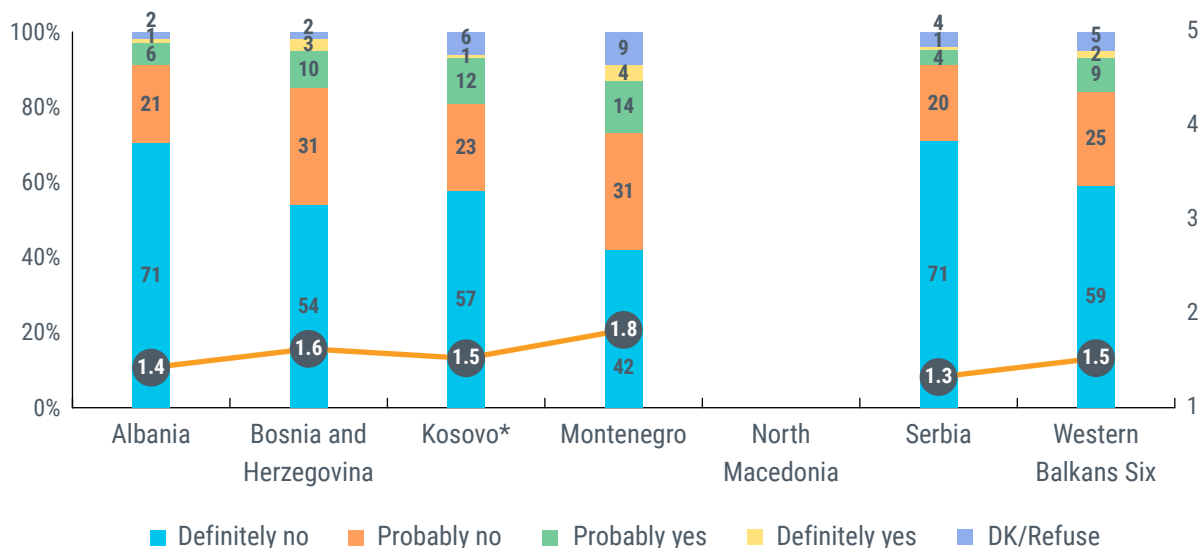
■ About 84% of respondents from the region express reluctance towards relocating to North Macedonia, while approximately 11% show openness to considering such a move. Notably, Albania stands out with the highest percentage of respondents (92%) expressing a lack of interest in moving to North Macedonia, closely followed by Serbia at 91%. Similarly, sentiments across other economies mirror this pattern, ranging from 81% in Bosnia and Herzegovina to 73% in Montenegro, indicating a widespread lack of enthusiasm.



FIGURE 68

Considering North Macedonia: Is It the Right Place to Live and Work Q29. [S] Would you consider living and working in one of the Western Balkan economies?

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



■ Around 74% of respondents from the region express reservations about relocating to Serbia, while approximately 21% exhibit openness to the idea. Notably, Albania stands out with the highest percentage of respondents (97%) expressing a lack of interest in moving to Serbia, followed closely by Kosovo* at 91%. Montenegro has the highest proportion of respondents who would consider moving to Serbia, 39%.

FIGURE 69

Considering Serbia: Is It the Right Place to Live and Work Q29. [S] Would you consider living and working in one of the Western Balkan economies?

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

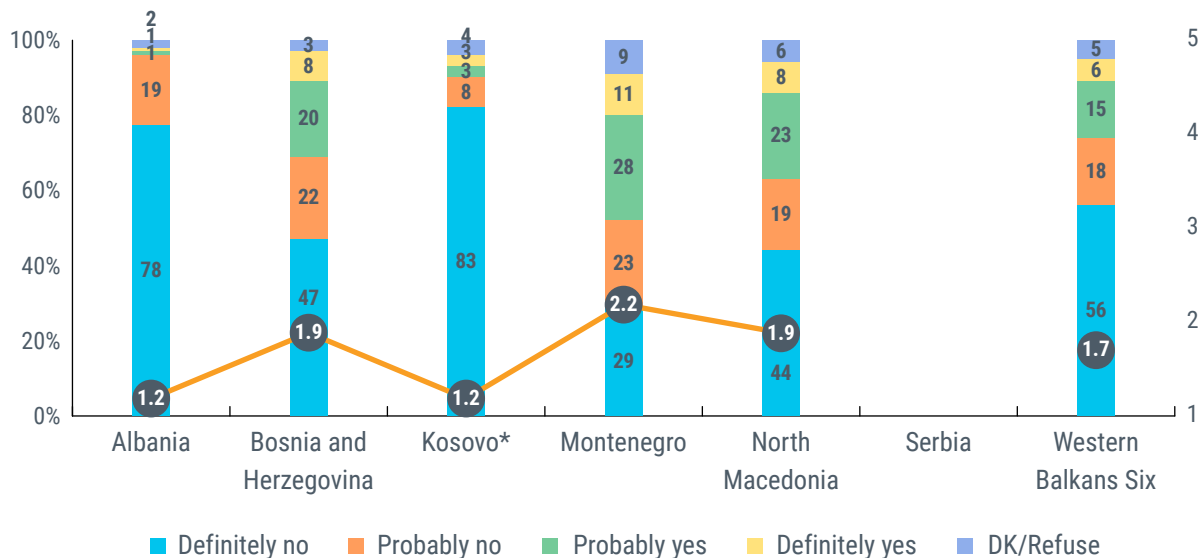
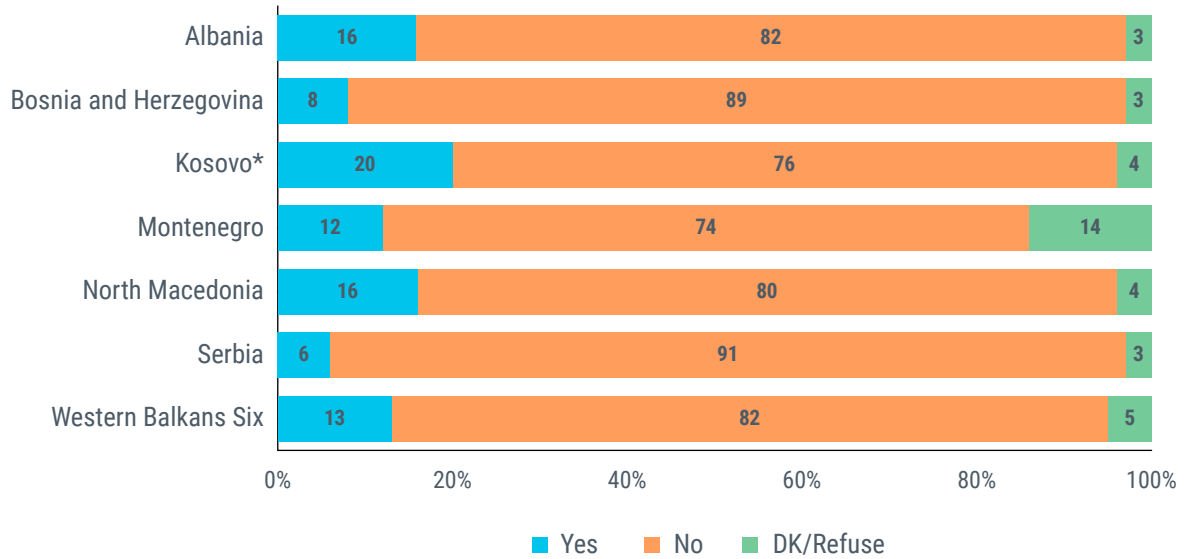




FIGURE 70

Taking the Leap: Have You Prepared for Living and Working Abroad?
Q30. [S] Have you made any plans or preparations for this purpose, such as applying for legal migration, work visa, employment, etc.?
(All respondents, N=6000, share of total, %)



Regarding respondents pursuing legal migration and employment opportunities through working visas, only a minority have started this process, while a significant majority have not. Kosovo* shows the highest percentage amongst those who have taken steps towards legal migration and employment, 20%, followed closely by North Macedonia and Albania at 16% each. In contrast, Serbia has the highest proportion of respondents who have not considered these options, around 91%, followed by Bosnia and Herzegovina at 89%. This indicates significant variation in attitudes towards seeking legal migration and employment opportunities amongst respondents from different economies in the region.

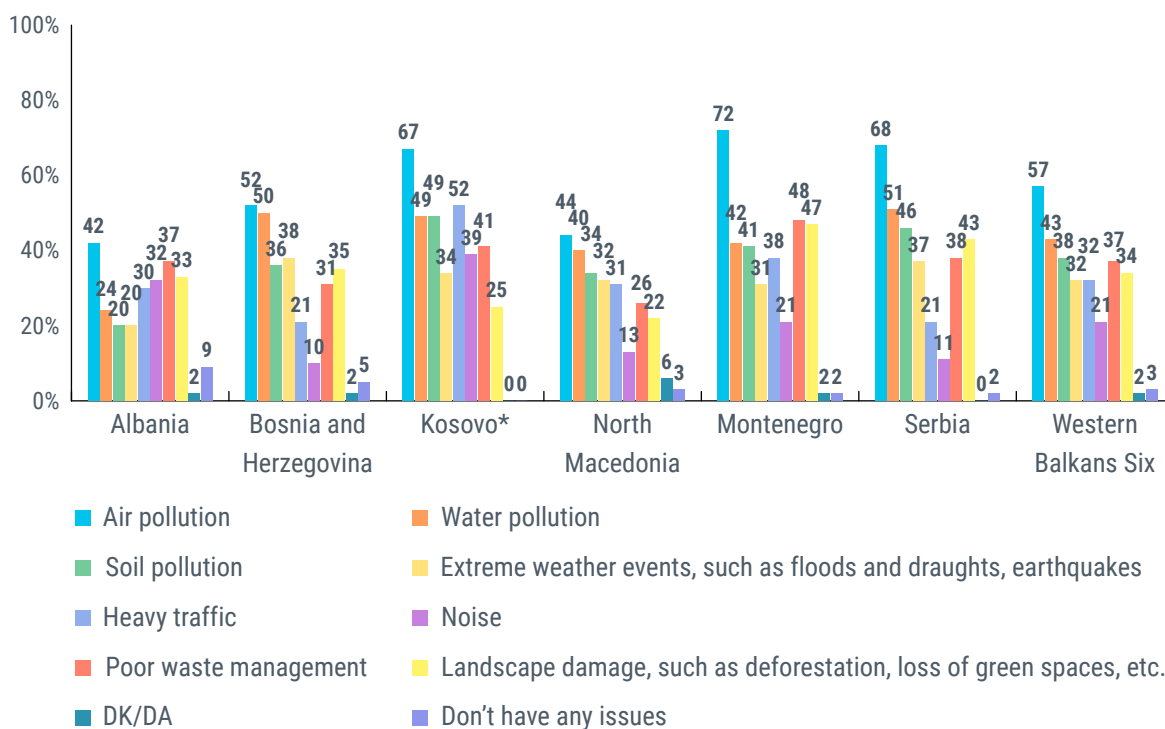


ATTITUDES TOWARDS CLIMATE CHANGE AND ENERGY

FIGURE 71

Community Concerns: What Are Your Top Environmental Worries?
Q31. [M] What are your greatest environmental concerns in your community?

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



Environmental concerns across the Western Balkans Six are varied but significant. Air pollution emerges as the top issue, particularly acute in North Macedonia, Serbia, and Kosovo*. Water pollution is also a major concern, notably in Serbia and Bosnia and Herzegovina. Heavy traffic and noise pollution are significant worries in Albania, Kosovo*, and North Macedonia. Poor waste management poses a major challenge in Kosovo*, Serbia, and North Macedonia. Landscape damage, though less prominent, is a concern in Albania and Bosnia and Herzegovina. Moderate levels of concern are noted for extreme weather events in Serbia, Bosnia and Herzegovina, Kosovo*, and Montenegro. Overall, the region faces diverse environmental challenges, with air and water pollution standing out as the most pressing issue.

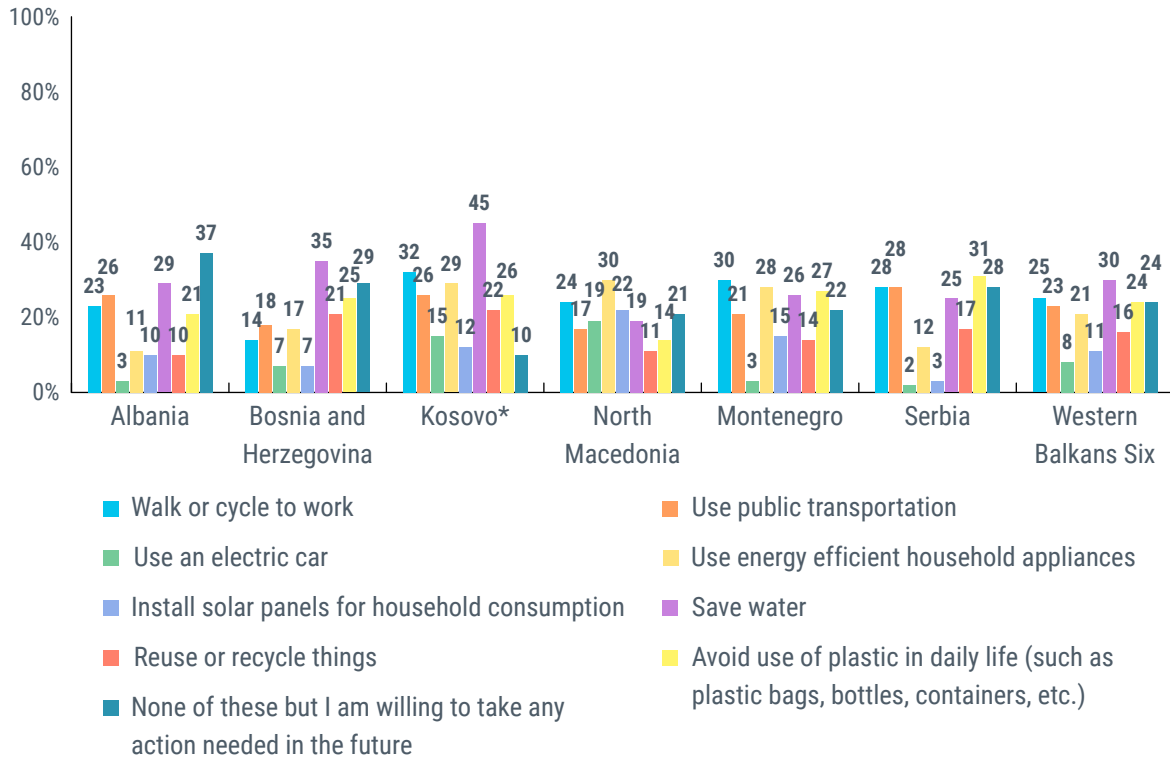


FIGURE 72

Your Climate Impact: Actions Taken in the Past Year to Combat Climate Change

Q32. [M] What action(s) have you personally taken to fight climate change over the past 12 months?

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



Respondents across the Western Balkans Six are actively adopting various actions to address climate change. Walking or cycling to work is notably popular in Kosovo*, North Macedonia, Serbia, and Montenegro. Public transportation is widely used in Serbia, Albania, and Kosovo*, indicating a reliance on public transit systems in these regions.

- However, adoption of electric cars remains low across all economies, with higher percentages seen in Montenegro and Kosovo*, suggesting challenges related to infrastructure and affordability. Energy-efficient household appliances are more commonly used in Montenegro, Kosovo*, and North Macedonia, but less so in Albania and Serbia.
- Solar panel installation for household consumption is more prevalent in Montenegro and North Macedonia. Reusing or recycling items is significant, particularly in Kosovo* and Bosnia and Herzegovina, while saving water is widely practiced in Bosnia and Herzegovina and Kosovo*.
- Efforts to reduce plastic use in daily life are consistent across the region, with higher percentages in Serbia, North Macedonia, and Kosovo*, reflecting growing awareness of environmental impacts. A notable portion of respondents in Albania and Bosnia and Herzegovina expressed readiness to take future actions, highlighting potential for increased engagement in climate initiatives through incentives and education.



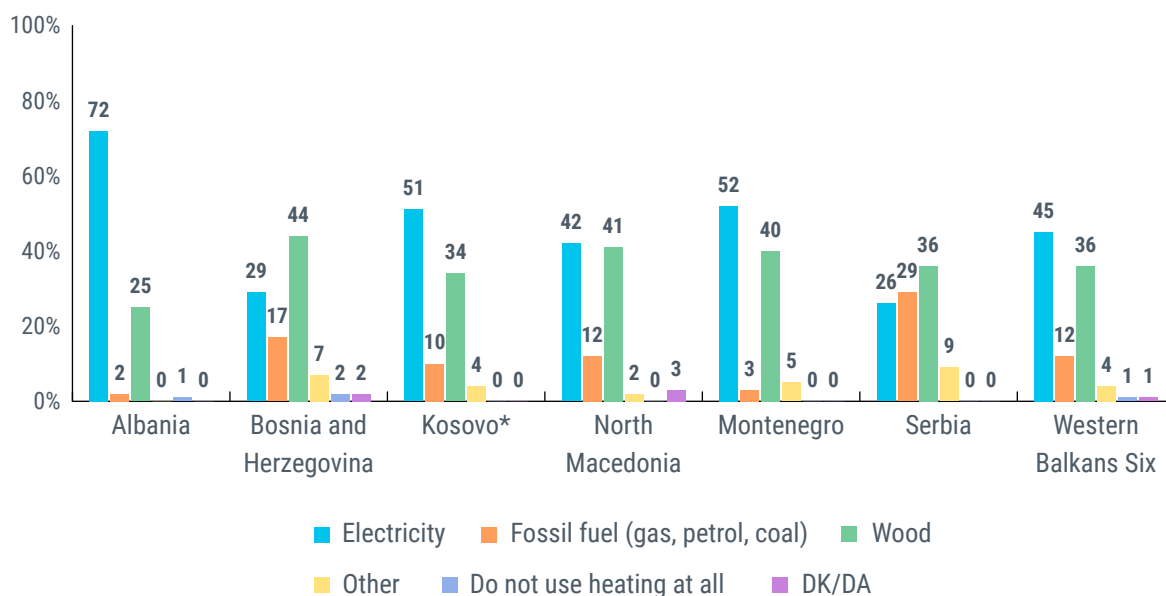
- In summary, the data underscores active participation in climate-friendly practices across the Western Balkans, alongside opportunities for further enhancement and adoption of sustainable behaviours.

FIGURE 73

Heating Your Home: What's Your Main Energy Source?

Q33. [S] What is the main source of energy for heating in your household?

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



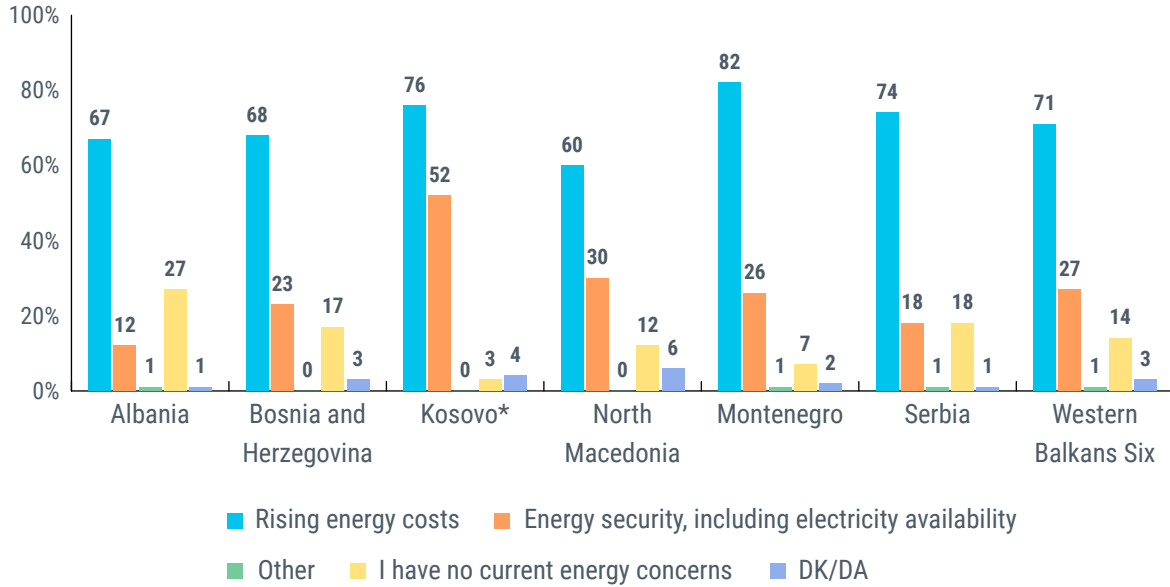
Across the Western Balkans Six, electricity and wood are the predominant sources for household heating, reflecting varying patterns amongst different economies (Figure 73). Fossil fuels play a smaller role, while other heating sources are used minimally.

In Albania, a significant majority of households rely on electricity (72%) for heating, with wood also being widely used (25%), and a smaller fraction using fossil fuels (2%). Bosnia and Herzegovina shows a diverse distribution with a notable reliance on wood (44%), followed by electricity (29%) and fossil fuels (17%), while Kosovo* primarily uses electricity (51%), followed by wood (34%) and fossil fuels (10%). Montenegro demonstrates a nearly equal split between wood (41%) and electricity (42%) usage for heating, with a smaller portion using fossil fuels (12%). North Macedonia sees a high use of electricity (52%) and wood (40%), with a minimal use of fossil fuels (3%) and other sources (5%). In Serbia, wood is the most common heating source (36%), followed by fossil fuels (29%) and electricity (26%).



FIGURE 74

Power Struggles: Top Energy Concerns in Your Household
Q34. [M] What are the biggest energy concerns in your household?
(All respondents, N=6000, multiple answers, share of total, %)



Across all economies in the Western Balkans Six, the primary issue of concern revolves around the increasing costs of energy (Figure 74). This is underscored by significant percentages of respondents in each economy. On average, 71% of respondents across the region identify rising energy costs as their top concern. Following closely behind is energy security, particularly concerning electricity availability. This is a notable concern in Kosovo*, Montenegro, and North Macedonia, with an average of 27% of respondents across the Western Balkans Six expressing worry in this area. There is also a segment of respondents who indicate other energy-related concerns or have no current worries about energy. This latter group is particularly prominent in Albania, Serbia, and Bosnia and Herzegovina.



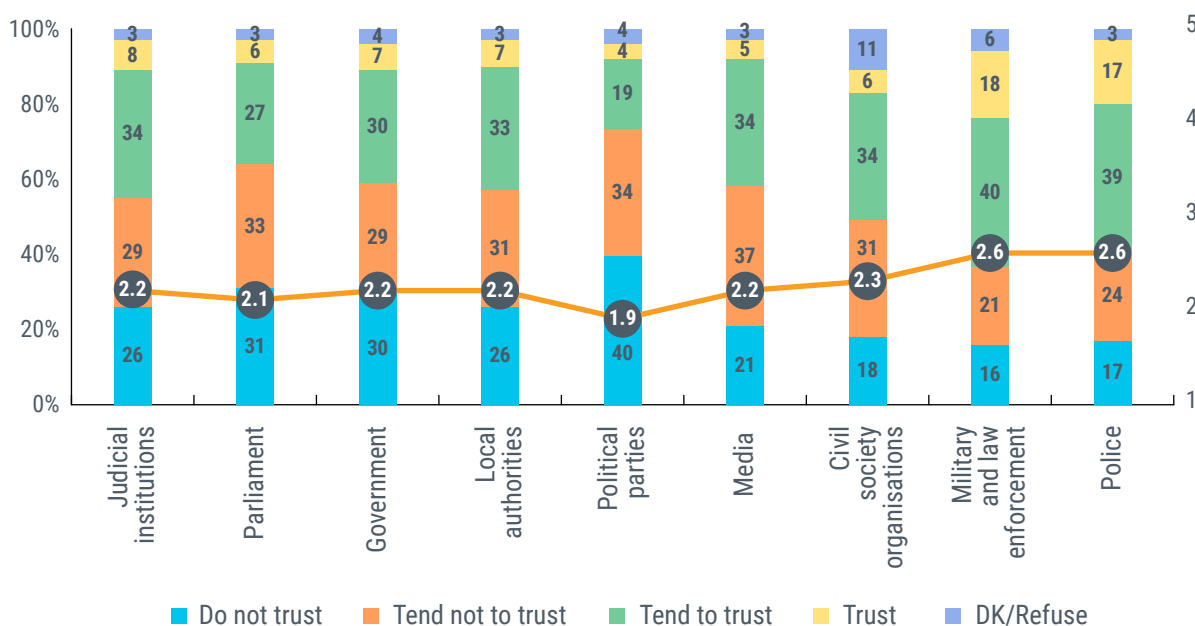
PERCEPTIONS OF PUBLIC INSTITUTIONS AND SERVICES

FIGURE 75

Measuring Trust: How Do You Rate These Institutions?
Q35. [S PER ROW] How much trust do you have in the following institutions?

Western Balkans Six

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



Exploration into trust in institutions at the regional level in Western Balkans Six unveils nuanced dynamics reflective of the diverse socio-political landscapes across Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, North Macedonia and Serbia.

The data indicates a general trend of pronounced mistrust in institutions. Judicial institutions, government, local authorities and media exhibit similar mean trust scores, with about 55-59% of respondents expressing distrust.

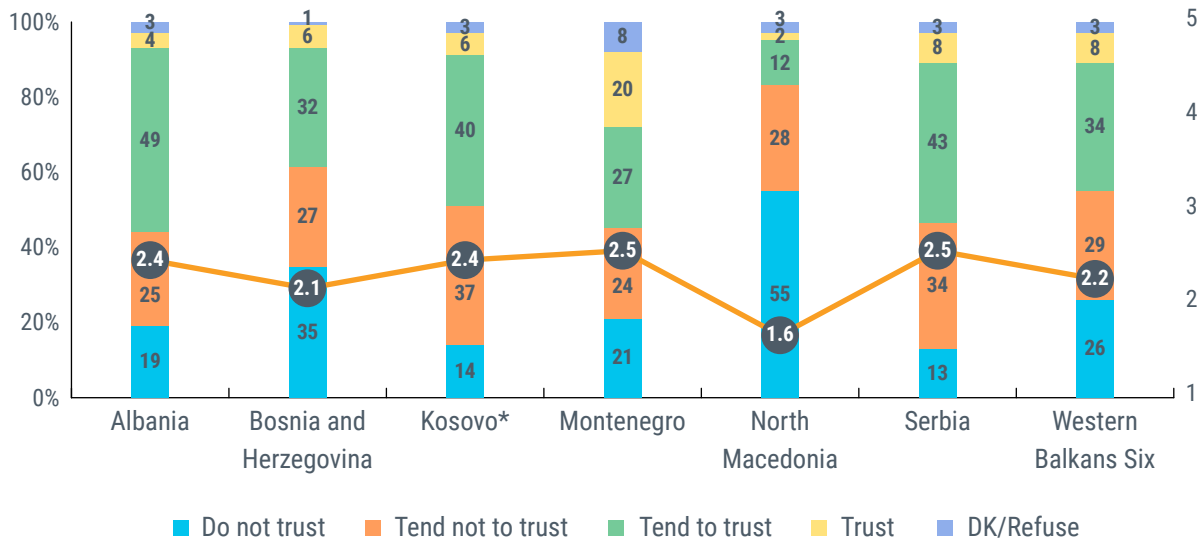
Political parties are the least trusted, with a significant 74% of respondents expressing distrust. In contrast, law enforcement and civil organisations are perceived more favourably. The military and police are the most trusted, with mean trust levels at 58% and 56%, respectively. Notably, there has been a significant increase in trust in judicial institutions (42%, up 9 points from 2023) and police (56%, up 11 points from 2023).



FIGURE 76

Evaluating Confidence in Key Institutions: Judicial Institutions Q35. [S PER ROW] How much trust do you have in the following institutions?

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



When considering trust in judicial institutions, the Western Balkans Six indicates a predominant trend of scepticism, though significant differences suggest varying public perceptions of judicial efficacy and integrity across the region.

Respondents in Albania exhibit the highest level of trust in judicial institutions, with a noteworthy 53% of respondents either tending to trust or completely trusting the judiciary. This result is partly attributed to ongoing judicial reforms and anti-corruption measures. Significant progress includes a fully staffed Constitutional Court, achievements by the Specialised Structure against Corruption and Organised Crime (SPAK), a new Chief Special Prosecutor, 40 new magistrates, and a vetting process, all contributing to a positive perception of the judiciary.⁶

Respondents in Kosovo*, Montenegro and Serbia present higher trust levels than the regional average, particularly in Montenegro where 20% of respondents express full trust.

Conversely, there is a notable lack of trust towards judicial institutions in North Macedonia, with a striking 83% of respondents expressing scepticism (“do not trust” or “tend not to trust”), followed by Bosnia and Hercegovina with 62% of respondents being sceptic. Concerns about political influence in North Macedonia arose from the controversial dismissal of the President of the Judicial Council, and the new judicial reform strategy that is behind schedule. Delayed promotions for higher courts and inadequate measures to address upcoming retirements have affected efficiency, exacerbating public distrust.⁷

⁶ European Commission, Albania 2023 Report, https://neighbourhood-enlargement.ec.europa.eu/system/files/2023-11/SWD_2023_690%20Albania%20report.pdf

⁷ European Commission, North Macedonia 2023 Report, https://neighbourhood-enlargement.ec.europa.eu/system/files/2023-11/SWD_2023_693%20North%20Macedonia%20report.pdf

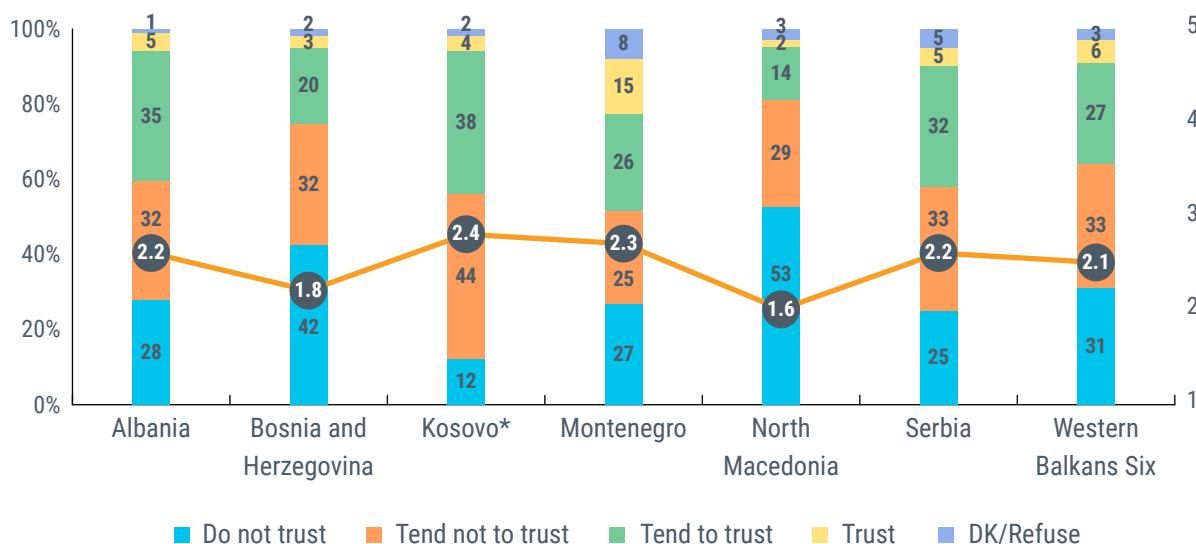


FIGURE 77

Evaluating Confidence in Key Institutions - Parliament

Q35. [S PER ROW] How much trust do you have in the following institutions?

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



The findings underscore a pervasive sentiment of distrust towards parliamentary institutions across the Western Balkan economies. North Macedonia and Bosnia Herzegovina emerge as the epicentres of this scepticism, with a staggering 82% and 74% of respondents expressing distrust.

Parliament's work in North Macedonia is characterised by political polarisation, which deepened further in the last twelve months, delaying the adoption of many reform laws and important appointments⁸. EC economy report for Bosnia and Herzegovina shows weak parliamentary oversight and stagnant political party regulations, perpetuating corruption vulnerabilities and eroding public trust.⁹

Respondents in Kosovo*, Montenegro, Albania and Serbia showcase comparatively higher levels of trust in parliament, albeit falling short of constituting a majority. Specifically, Kosovo* boasts a modest 42% of respondents professing trust in parliament, followed closely by Montenegro and Albania, each garnering 41% and 40% affirmation rates, respectively.



⁸ European Commission, North Macedonia 2023 Report, https://neighbourhood-enlargement.ec.europa.eu/system/files/2023-11/SWD_2023_693%20North%20Macedonia%20report.pdf

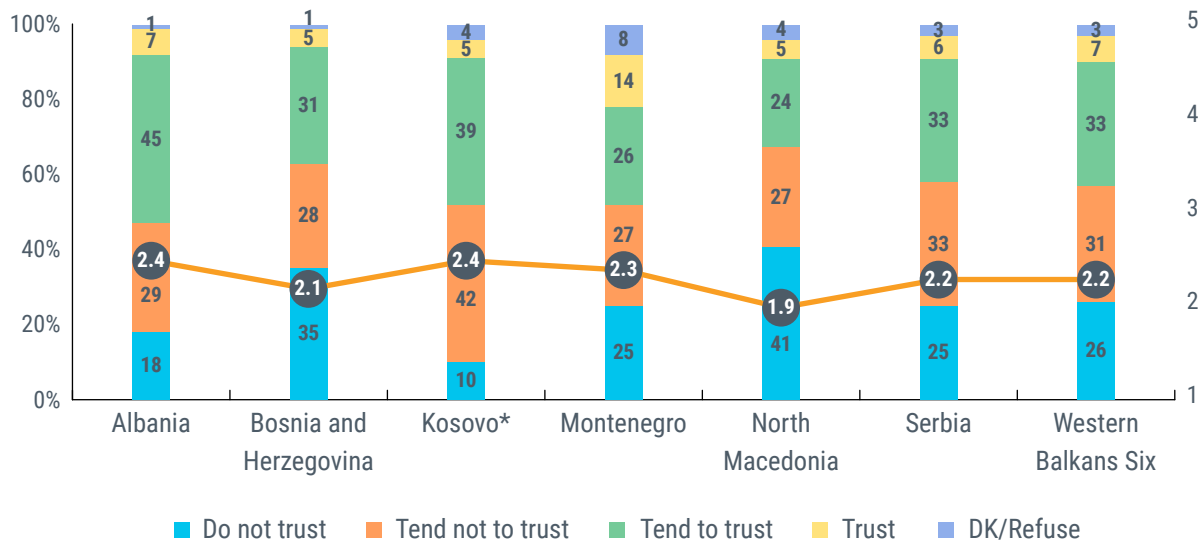
⁹ European Commission, Bosnia and Herzegovina 2023 Report, https://neighbourhood-enlargement.ec.europa.eu/system/files/2023-11/SWD_2023_691%20Bosnia%20and%20Herzegovina%20report.pdf



FIGURE 78

Evaluating Confidence in Key Institutions – Local authorities Q35. [S PER ROW] How much trust do you have in the following institutions?

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



In the landscape of trust vis-à-vis local authorities in the Western Balkan economies, approximately 40% of respondents across the region extend varying degrees of trust towards their local government institutions, embodying a delicate balance between optimism and apprehension. Over half of respondents in Albania (52%) express trust in local governance structures, underscoring a positive perception of local authorities. Kosovo* follows suit, albeit with a marginally lower affirmation rate (44%), signifying a semblance of trust in local authorities.

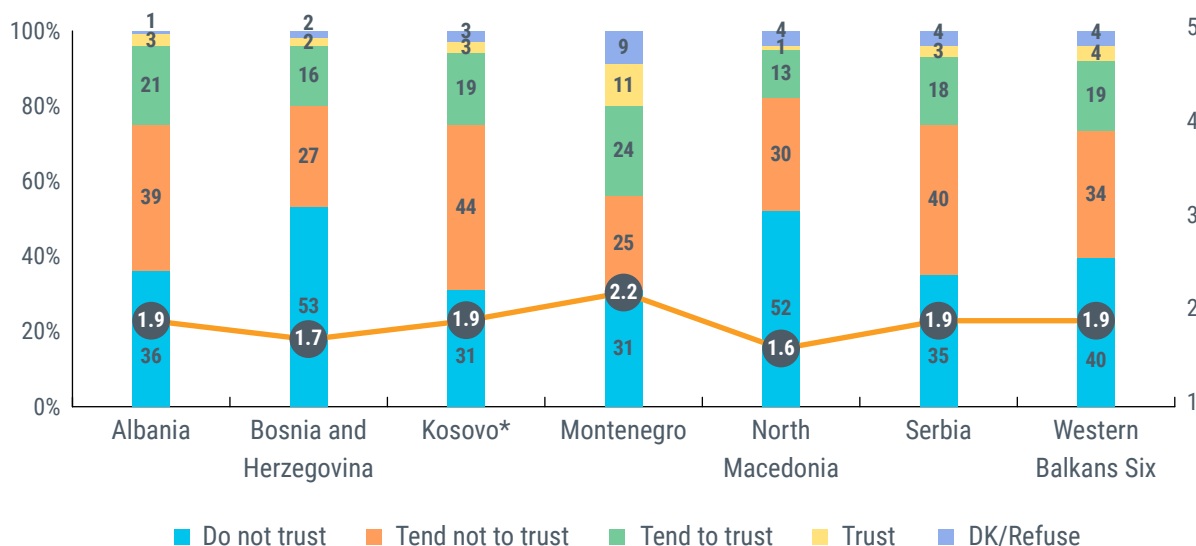
Conversely, the landscape in North Macedonia and Bosnia and Herzegovina registers the highest level of scepticism, with a substantial of 68% and 63% of respondents, respectively, voicing distrust in local authorities.



FIGURE 79

Evaluating Confidence in Key Institutions – Political Parties Q35. [S PER ROW] How much trust do you have in the following institutions?

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



The data on trust in political parties across Western Balkan economies reveals low levels of confidence amongst citizens. While a considerable majority of citizens in all WB economies either express distrust or tend towards scepticism regarding political parties, such distrust tends to be higher in the case of North Macedonia and Bosnia and Herzegovina, with more than 80% of respondents in these economies expressing a lack of trust and over half (52% and 53%, respectively) expressing outright distrust (“do not trust”). In line with EC economy reports, political parties in both North Macedonia and Bosnia and Herzegovina should improve their internal democratic processes and increase transparency in political parties financing.¹⁰

Albania, Kosovo*, and Serbia all share a similar trend, reflecting substantial distrust, as over 70% of respondents in each economy either “do not trust” or “tend not to trust” political parties. It is worth noting that Montenegro reflects a somewhat more balanced sentiment, with notable proportions distributed across total distrust (31%), scepticism (25%), and a moderate level of trust (24%).

Overall, the regional data consolidates the trend of low trust, with 40% of respondents across the Western Balkans Six expressing complete distrust and 34% tending not to trust political parties, leaving only a small minority of 23% who show some level of trust. These findings underscore the pressing need for political reform and rebuilding of trust between citizens and political institutions across the region.



¹⁰ European Commission, North Macedonia 2023 Report, https://neighbourhood-enlargement.ec.europa.eu/system/files/2023-11/SWD_2023_693%20North%20Macedonia%20report.pdf
European Commission, Bosnia and Herzegovina 2023 Report, https://neighbourhood-enlargement.ec.europa.eu/system/files/2023-11/SWD_2023_691%20Bosnia%20and%20Herzegovina%20report.pdf

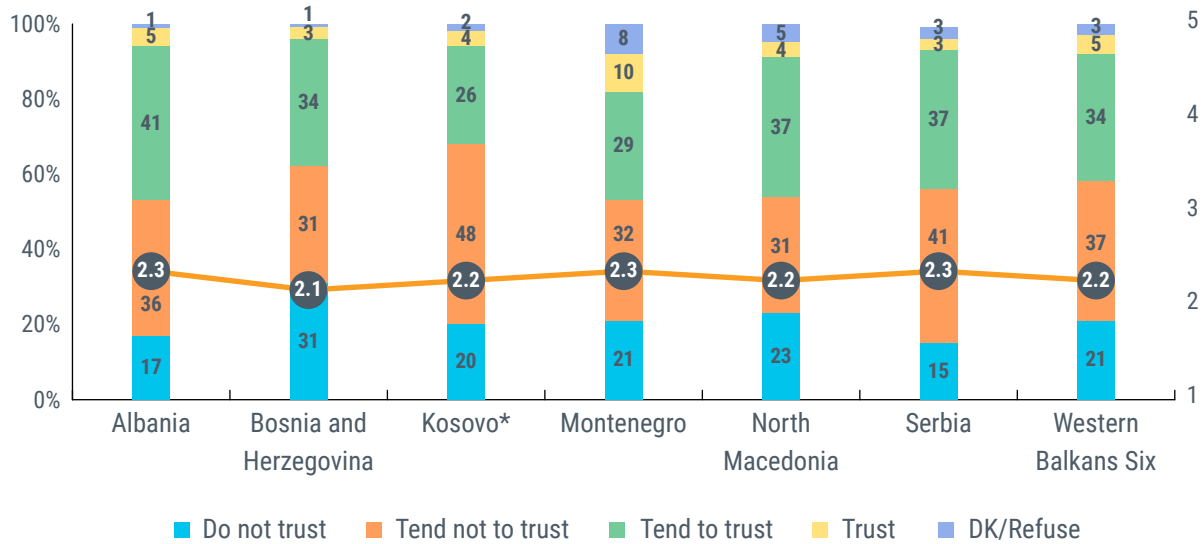


FIGURE 80

Evaluating Confidence in Key Institutions - Media

Q35. [S PER ROW] How much trust do you have in the following institutions?

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



The data concerning trust in the media across Western Balkan economies reveals a consistent pattern of widespread distrust amongst respondents (ranging from 53% to 68%), albeit with some variations amongst individual economies.

Notably, respondents in Kosovo* exhibit the highest level of distrust in media outlets at 68%, closely followed by respondents in Bosnia and Herzegovina at 62%. The latest Reporters Without Borders report¹¹ revealed significant decline in press freedom: Kosovo*'s media freedom index dropped to 75th place out of 180 economies while Bosnia and Herzegovina fell to 81st position. Albania, Montenegro, North Macedonia, and Serbia also demonstrate considerable levels of distrust, ranging from 53% to 56%.

Conversely, some degree of trust in the media appears to be less prevalent, with percentages ranging from 30% (Kosovo*) to 46% (Albania). Despite these variations, the overarching trend of scepticism towards the media underscores the challenges facing media credibility and public trust in the region.

¹¹ Reporters Without Borders, World Press Freedom Index 2023 Report, <https://rsf.org/en/map-2024-world-press-freedom-index>

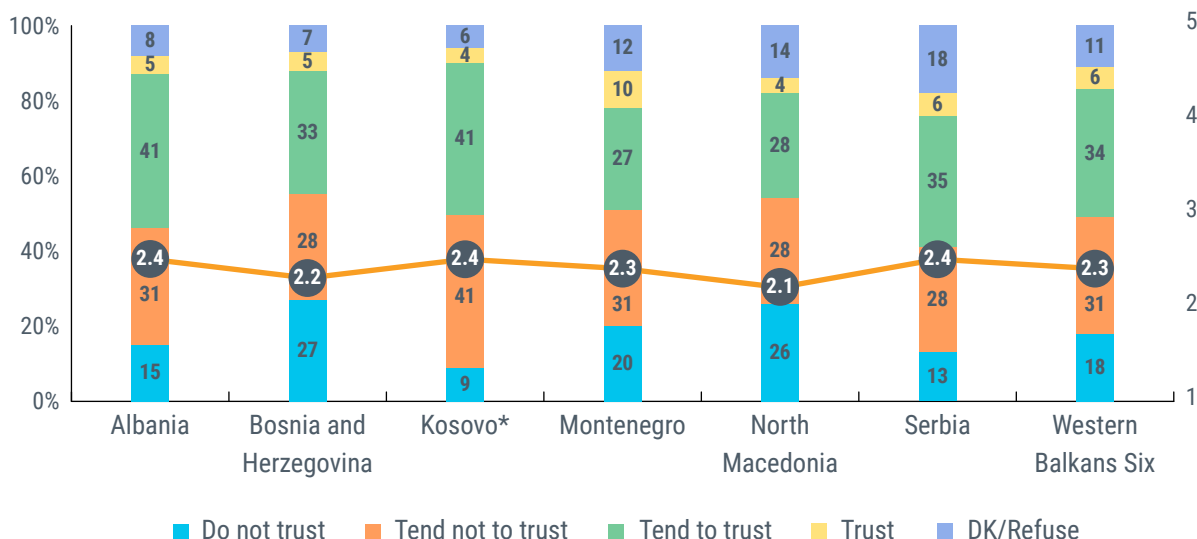


FIGURE 81

Evaluating Confidence in Key Institutions – Civil Society Organisations

Q35. [S PER ROW] How much trust do you have in the following institutions?

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



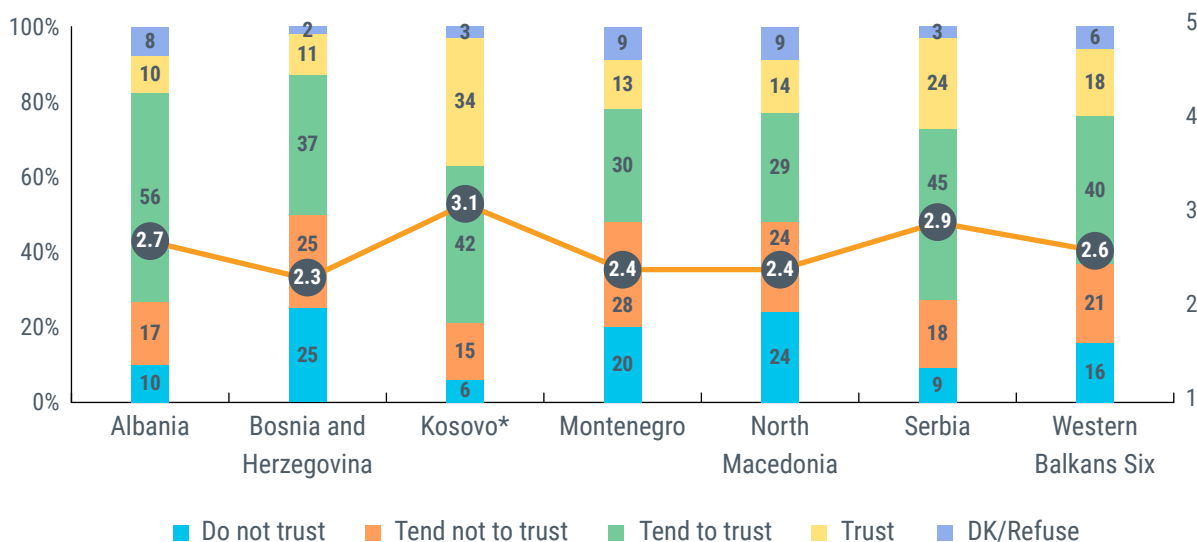
The data on trust in civil society organisations (CSOs) across Western Balkans Six reflects a mixed landscape of public sentiment. While distrust appears to be prevalent in most economies, with percentages ranging from 41% to 55%, trust is also notable, ranging from 32% to 46%. Respondents in Bosnia and Herzegovina exhibit the highest level of distrust at 55%, followed closely by respondents in North Macedonia and Montenegro at 54% and 51%, respectively. Conversely, trust in CSOs is relatively higher in Kosovo* and Albania, with percentages ranging from 45% to 46%.

FIGURE 82

Evaluating Confidence in Key Institutions – Military and Law Enforcement

Q35. [S PER ROW] How much trust do you have in the following institutions?

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





Information regarding trust in military and law enforcement institutions across Western Balkan economies unveils a generally positive perception amongst respondents, with varying degrees of trust observed across different economies (ranging from 43% to 76%).

Kosovo* emerges as the leader in trust, with a notable 76% expressing confidence in these institutions, accompanied by low levels of distrust at 21%. Similarly, Albania and Serbia also demonstrate a strong level of trust, with 66% and 69% of respondents respectively, outweighing levels of distrust.

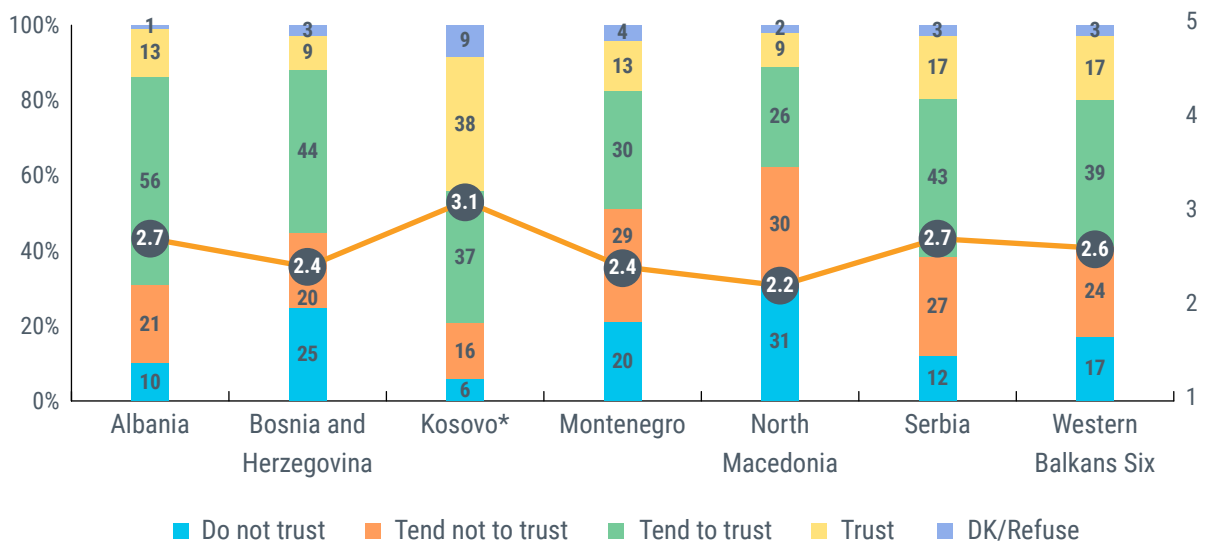
Conversely, respondents in Bosnia and Herzegovina display a more balanced perception, with distrust standing at 50% and trust at 47%. Respondents in Montenegro and North Macedonia showcase slightly higher levels of distrust, at 48%, juxtaposed against trust levels of 43%. Overall, the data underscores a generally positive sentiment towards military and law enforcement institutions in the Western Balkans Six, indicative of a degree of public trust in national security and governance.

FIGURE 83

Evaluating Confidence in Key Institutions – Police

Q35. [S PER ROW] How much trust do you have in the following institutions?

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



The analysis of trust in the police across Western Balkan economies reveals a prevailing degree of trust in police institutions across Albania, Bosnia and Herzegovina, Kosovo* and Serbia, albeit with a major degree of distrust in the case of Montenegro and North Macedonia.

Respondents in Kosovo* emerge as a standout, with an overwhelming 75% expressing trust in the police, accompanied by a low distrust level of 22%. Kosovo* has adopted a new police organisational structure and upgraded intelligence and analysis capacities, hence increasing its effectiveness.¹² Similarly, respondents in Albania demonstrate a high level of trust at 69%, outweighing distrust at

¹² European Commission, Kosovo* 2023 Report, https://neighbourhood-enlargement.ec.europa.eu/document/download/760aacca-4e88-4667-8792-3ed08cdd65c3_en?filename=SWD_2023_692%20Kosovo%20report_0.pdf



31%. Respondents in Serbia also exhibits a relatively strong trust in the police at 60%, though with a somewhat higher level of distrust at 39%.

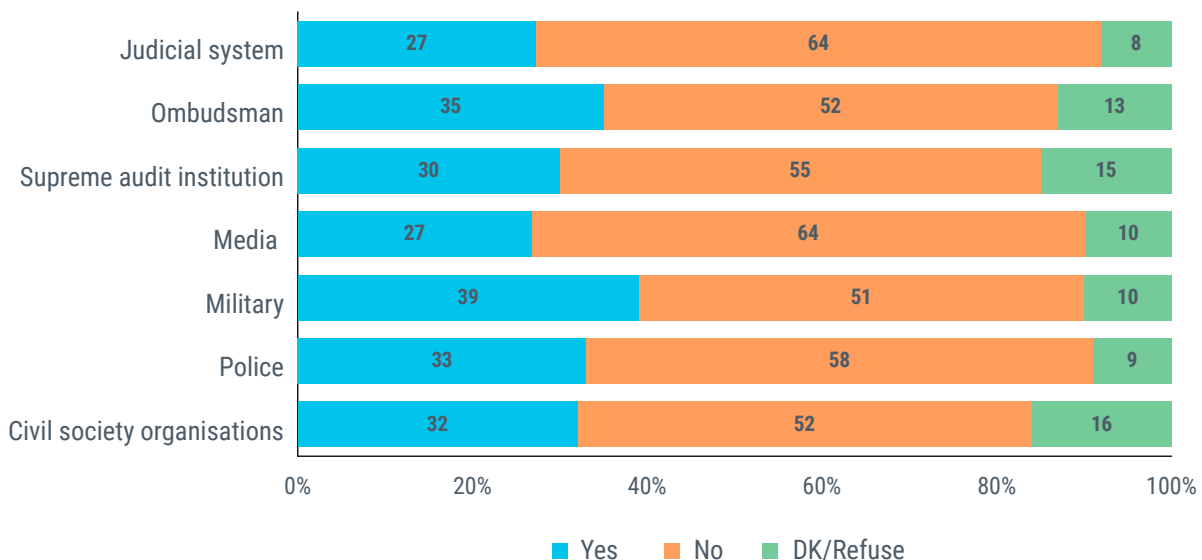
Conversely, respondents in Bosnia and Herzegovina, Montenegro, and North Macedonia portray more balanced perceptions, with trust slightly outweighing distrust in Bosnia and Herzegovina (45% distrust, 53% trust), while respondents in Montenegro (49% distrust, 43% trust) and North Macedonia (61% distrust, 35% trust) reveal higher levels of distrust.

FIGURE 84

Assessing Independence: Institutions Free from Political Influence Q36. [S PER ROW] Do you agree that the following institutions are independent of political influence?

Western Balkans

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



The analysis of perceptions regarding the independence of key institutions from political influence across Western Balkan economies highlights a prevalent scepticism amongst respondents, suggesting a pressing need for measures to enhance transparency, accountability, and institutional autonomy to bolster public trust in governance structures across the region.

The judicial system and media appear to face the greatest doubt, with only 27% of respondents agreeing that they are independent of political influence, while a majority of 64% express scepticism. Similarly, perceptions regarding the independence of civil society organisations, police, supreme audit institution and ombudsmen reflect widespread doubts ranging from 52% to 58%, with varying degrees of trust (30% to 35%).

Notably, the military garners relatively higher trust, with 39% of respondents perceiving it as independent of political influence, though scepticism still prevails at 51%.

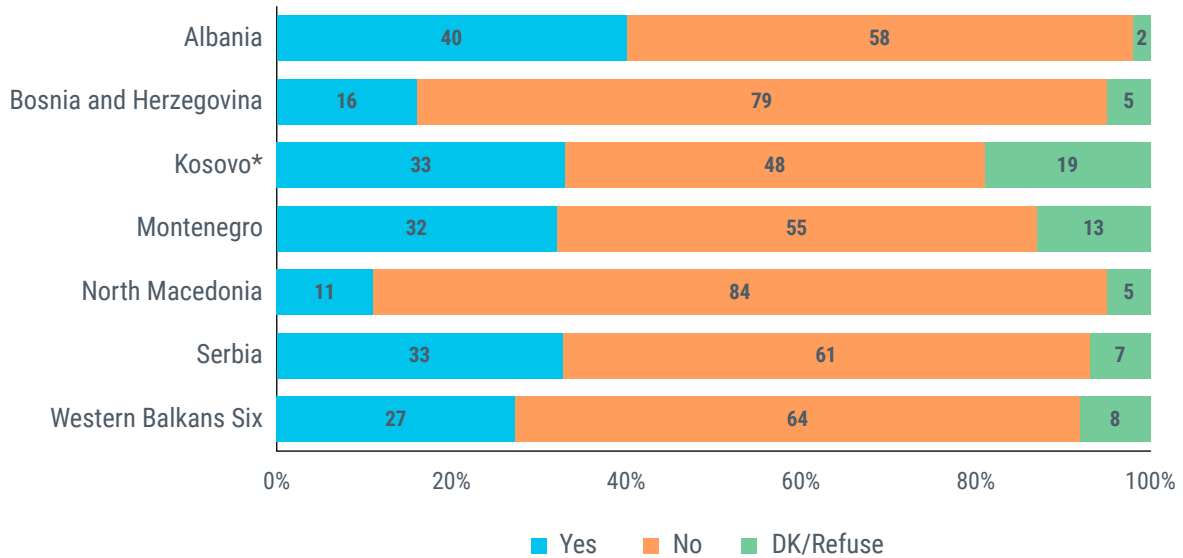


FIGURE 85

Assessing Independence: Judicial Institutions Free from Political Influence

Q36. [S PER ROW] Do you agree that the following institutions are independent of political influence?

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



The data presented in the graph shows respondents' perceptions of the independence of judiciary in various economies of the Western Balkans Six, underlining the scepticism regarding its independence from political influence.

Albania stands out as the most optimistic, with 39.8% of respondents believing in the independence of their judicial system, though a significant 58.3% still express doubts about its impartiality. In Bosnia and Herzegovina, scepticism is noticeably high, with only 15.6% of the respondents believing in judicial independence and 79.3% doubting it.

Kosovo* has a more mixed opinion. While 33.2% of respondents believe in the independence of judiciary, 48.2% disagree and a notable 18.6% are undecided or refuse to answer. In Montenegro, 32.3% of respondents believe in the independence of judiciary, but a majority of 55.1% do not and 12.6% of respondents are undecided.

Respondents in North Macedonia show the highest level of distrust, with 83.7% of respondents doubting the independence of their judicial system. Only 10.9% believe the judicial system is free from political influence, making it the economy with the least confidence in judicial impartiality.

Serbia also reflects considerable scepticism, with 60.9% of respondents not believing in the independence of the judicial system. However, 32.6% believe in its independence, showing a somewhat more optimistic view compared to respondents in North Macedonia and Bosnia and Herzegovina.

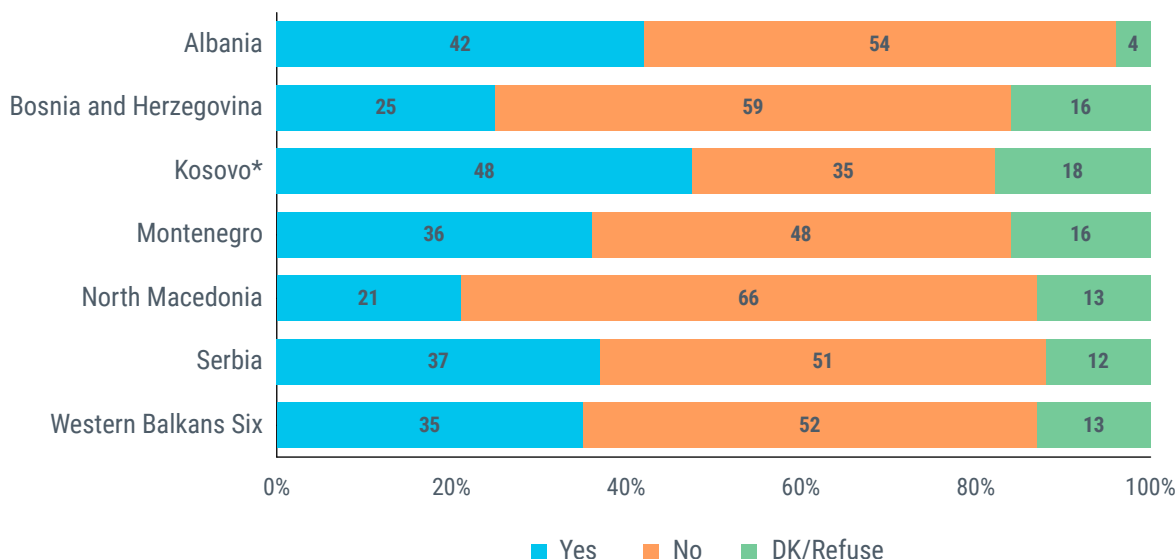


FIGURE 86

Assessing Independence: Ombudsperson Institution Free from Political Influence

Q36. [S PER ROW] Do you agree that the following institutions are independent of political influence?

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



The survey results reveal significant insights into the public perceptions of Ombudsman institution's independence of political influence. Albania recorded a clear division in public opinion. A significant 54.1% of respondents do not believe that the Ombudsman is independent of political influence, while 42.2% have confidence in its independence.

Bosnia and Herzegovina demonstrates a high level of scepticism towards the Ombudsman institution, with 59.3% of respondents doubting its independence. Only 25% believe the institution functions independently of political influence, while 15.7% are unsure or chose not to answer, indicating some ambiguity and uncertainty in public perception.

Kosovo* presents a more divided and nuanced view. A notable 47.5% of respondents believe that the Ombudsman institution is independent, making it the most optimistic economy in the survey. However, 35% disagree, and a substantial 17.5% are undecided or refuse to answer, indicating mixed sentiments.

In Montenegro, public opinion is also divided but leans more towards scepticism. While 48.4% of respondents do not trust the independence of Ombudsman institution, 36% believe it is independent. Another 15.6% are unsure or chose not to answer, suggesting a significant level of indecision amongst the population.

North Macedonia stands out for its high level of mistrust towards the Ombudsman institution, with 65.9% of respondents not believing in its independence. Only 21% have confidence in the institution's independence, and 13.1% are undecided or refuse to answer, making North Macedonia the most sceptical economy in the survey regarding the Ombudsman's independence.



Even in Serbia, there is a considerable amount of scepticism, with 50.6% of respondents doubting the independence of Ombudsman institution. However, 37.4% believe in its independence, showing a significant portion of the population that holds a more optimistic view. Additionally, 12% are undecided or chose not to answer, highlighting some uncertainty amongst respondents.

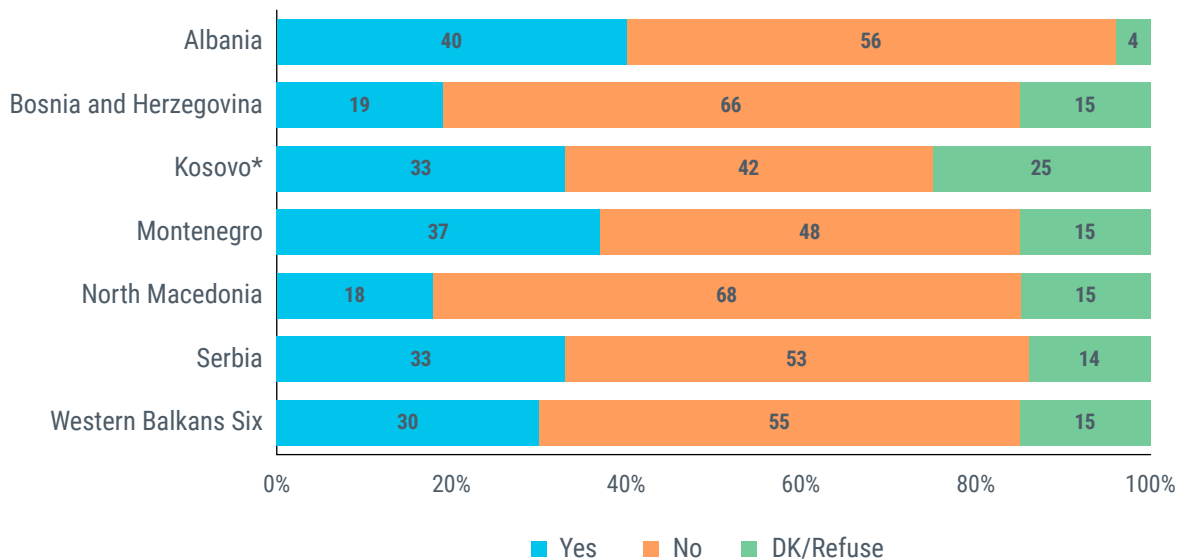
Overall, the survey indicates widespread scepticism about the independence of Ombudsman institutions across the Western Balkans Six. The presence of undecided respondents in each economy reflects varying degrees of uncertainty and ambiguity in public perception.

FIGURE 87

Assessing Independence: Supreme Audit Institution Free from Political Influence

Q36. [S PER ROW] Do you agree that the following institutions are independent of political influence?

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

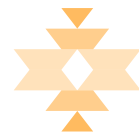


The survey data provide insight into the public perceptions of the independence of Supreme Audit Institution (SAI) from political influence across various economies in the Western Balkans Six.

In Albania, 40.1% of respondents believe that the SAI is independent of political influence, while 55.5% do not share this belief.

Bosnia and Herzegovina shows a high level of scepticism, with 65.7% of respondents doubting the independence of their SAI. Only 19.2% believe that the institution functions independently of political influence. Additionally, 15.1% of respondents are unsure or chose not to answer, suggesting a significant level of uncertainty and mistrust.

Kosovo* presents a more optimistic view compared to other economies. Here, 33.1% of respondents believe that the SAI is independent, while 41.5% disagree. A significant 25.4% are undecided or chose not to answer, reflecting a split opinion with a substantial portion of the population uncertain about the institution's independence.



Montenegro reflects a more balanced view with a tendency towards scepticism, with 37% of respondents who believe in the independence of their SAI, while 47.6% do not and 15.4% are unsure.

North Macedonia stands out for its high level of distrust towards the SAI, with 67.5% of respondents not believing in its independence. Only 17.6% have confidence in the institution's independence, and 14.9% are undecided or chose not to answer, making North Macedonia the most sceptical economy in the survey regarding the SAI's independence.

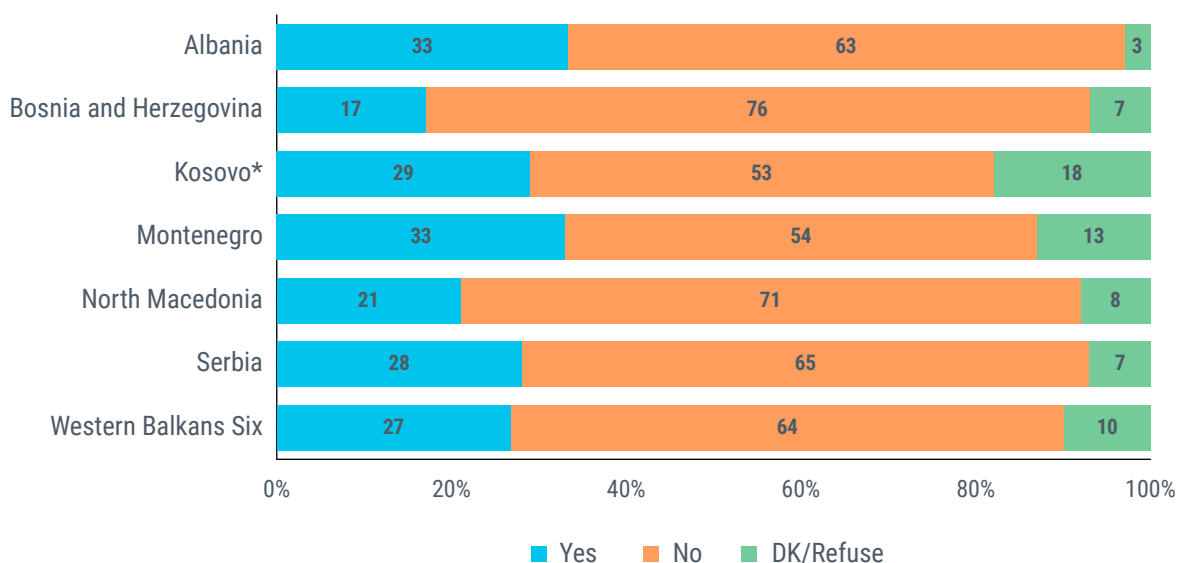
There is a significant amount of scepticism in Serbia, with 52.9% of respondents doubting the independence of SAI. However, 33.4% believe in its independence, indicating that a considerable part of the population has a more optimistic view. Additionally, 13.7% are undecided or chose not to answer, highlighting some uncertainty amongst the respondents.

FIGURE 88

Assessing Independence: Media Institution Free from Political Influence

Q36. [S PER ROW] Do you agree that the following institutions are independent of political influence?

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



Overall, scepticism about media independence is prevalent across the Western Balkan economies.

In Albania, 33.2% of respondents believe that the media is independent of political influence, while 63.4% do not share this belief and 3.4% are undecided.

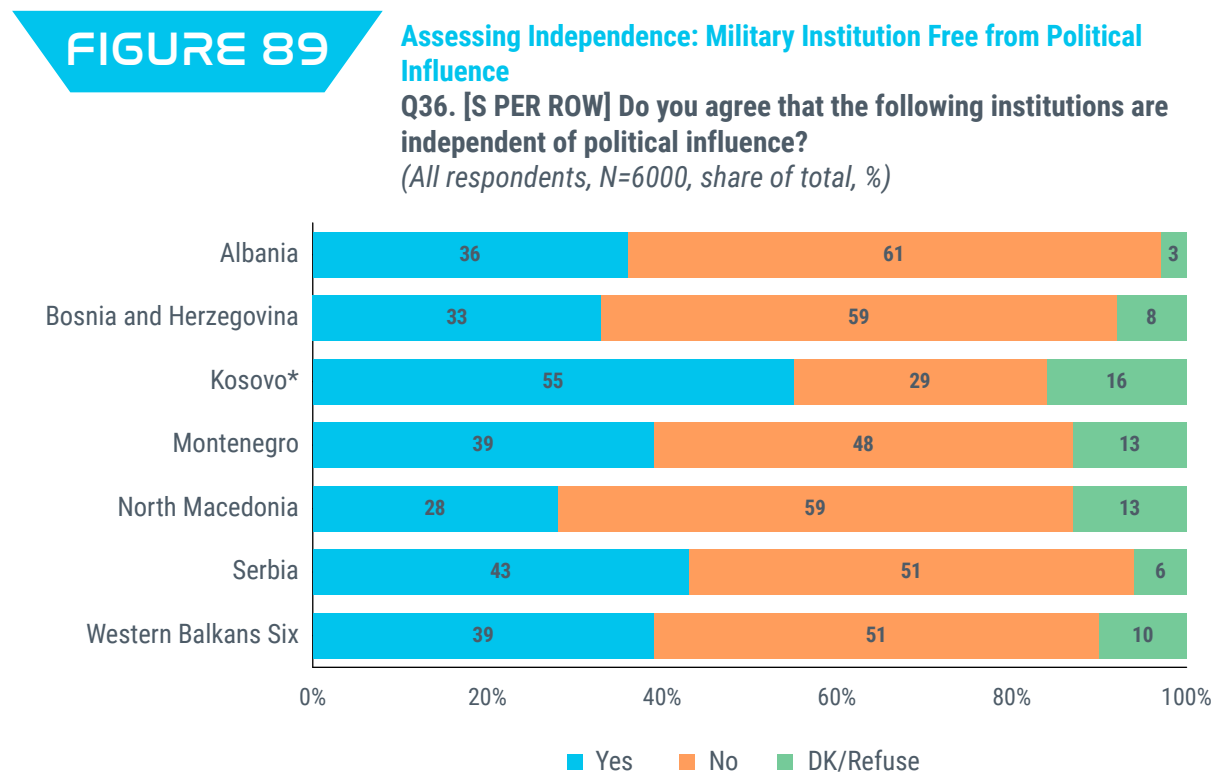
Bosnia and Herzegovina shows a high level of scepticism, with 75.7% of respondents doubting the independence of their media. Only 17.1% believe that the media operates independently of political influence, and 7.2% of respondents are unsure or chose not to answer. Kosovo* presents a more optimistic view compared to other economies. Here, 29% of respondents believe that the media is independent, while 52.8% disagree. A significant 18.2% are undecided or chose not to answer, reflecting



a split opinion with a substantial portion of the population uncertain about media independence. In Montenegro, 32.7% of respondents believe in the independence of their media, while 54.1% do not and 13.2% are undecided.

North Macedonia stands out for its high level of mistrust in media, with 70.5% of respondents not believing in its independence. Only 21.2% have confidence in media independence, and 8.3% are undecided or chose not to answer, making North Macedonia one of the most sceptical economies in the survey regarding media independence.

In Serbia, there is a significant amount of scepticism, with 64.6% of respondents doubting the independence of media. However, 28.4% believe in its independence, indicating that a significant part of the population holds a more optimistic view. Additionally, 7% are undecided or chose not to answer, highlighting some uncertainty amongst the respondents.



The data reveals insight into the public perceptions regarding the independence of military from political influence across various economies in the Western Balkans Six. Albania stands out for its high level of distrust in military, with 61% of respondents not believing that the military is independent of political influence, while 36% do share this belief and a small proportion, 2.5%, are undecided.

Bosnia and Herzegovina shows a high level of scepticism, with 59% of respondents doubting the independence of their military, while only 33% believe that the military operates independently of political influence and 8% of respondents are unsure.

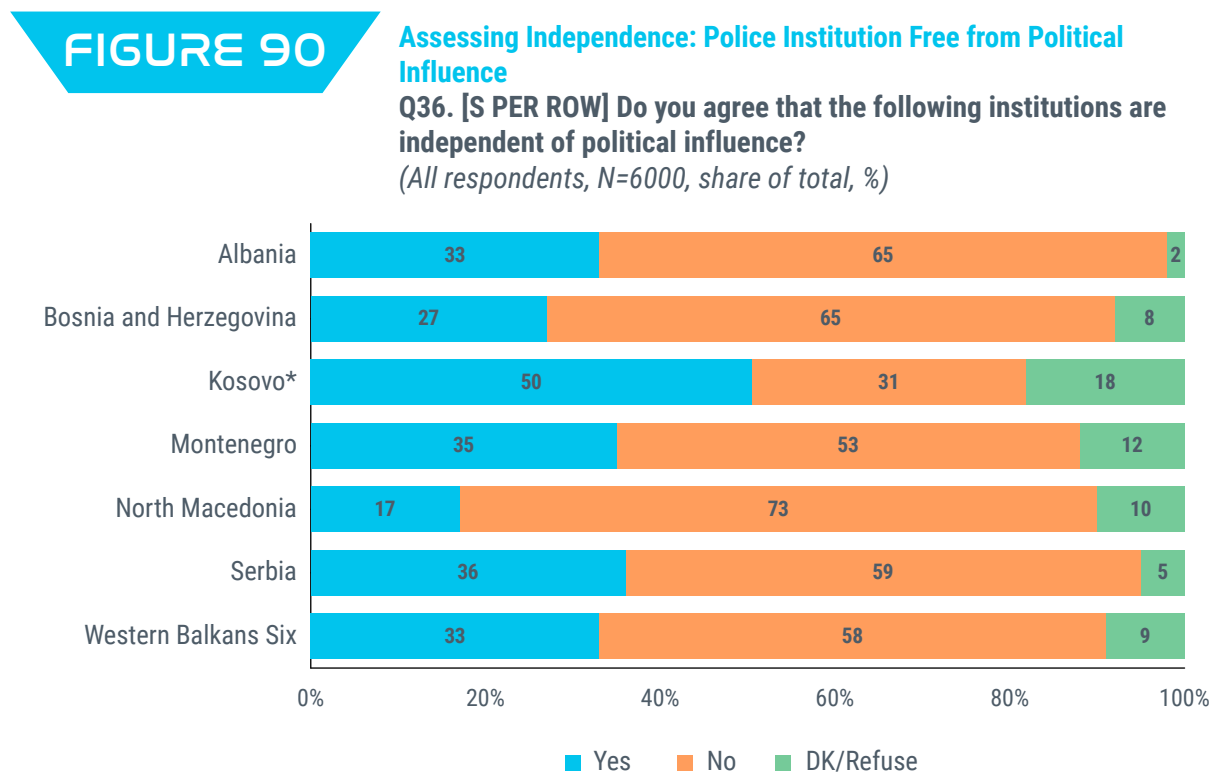
Kosovo* presents a more optimistic view compared to other economies. Here, 55.3% of respondents believe in military independence, while 28.7% disagree and 16% are undecided.

In Montenegro, 39.2% of respondents believe in the independence of their military, while 48.3% do not and another 12.5% are unsure or chose not to answer.

In North Macedonia, 58.9% of respondents do not believe in military independence. Only 28.4% have confidence in the military’s independence, and 12.7% are undecided or chose not to answer.

In Serbia, there is a considerable amount of scepticism, with 51% of respondents doubting the independence of military. However, 42.9% believe in its independence, indicating that a significant part of the population holds a more optimistic view. Additionally, 6.1% are undecided or chose not to answer, highlighting some uncertainty amongst the respondents.

Overall, the survey shows varying degrees of scepticism about the independence of military across the Western Balkans Six, with Kosovo* demonstrating the highest level of optimism and Albania showing significant scepticism.



Across Western Balkan economies, there is a prevailing sense of scepticism amongst the respondents regarding the independence of police from political influence, with 33% agreeing with their autonomy while 58% express doubt.

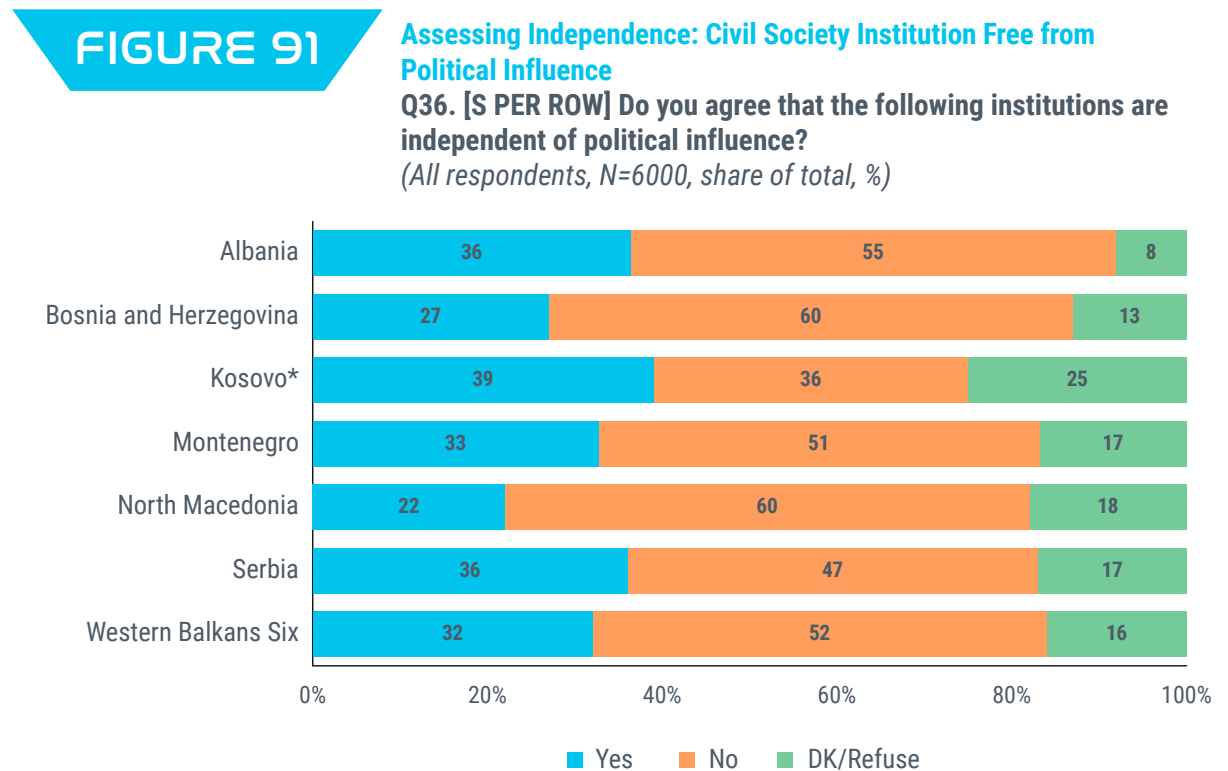
Respondents in Bosnia and Herzegovina and Albania showcase higher levels of scepticism, with 65% in disagreement with police independence.



Respondents in Serbia and Montenegro exhibit relatively similar patterns, with 36% and 35% respectively agreeing with police independence, yet significant majorities expressing scepticism.

In North Macedonia, the evaluation of police independence of political influence emerges as the lowest amongst the Western Balkan economies, with only 17% of respondents agreeing with their autonomy, while a substantial majority of 73% express scepticism.

Kosovo* stands out as the exception, with 50% of respondents expressing trust in the police’s independence, while only 31% disagree.



Data shows a prevalent scepticism regarding the independence of Civil Society Organisations (CSOs) from political influence across the Western Balkan economies, with only 32% agreeing with their autonomy while a majority of 52% express doubt.

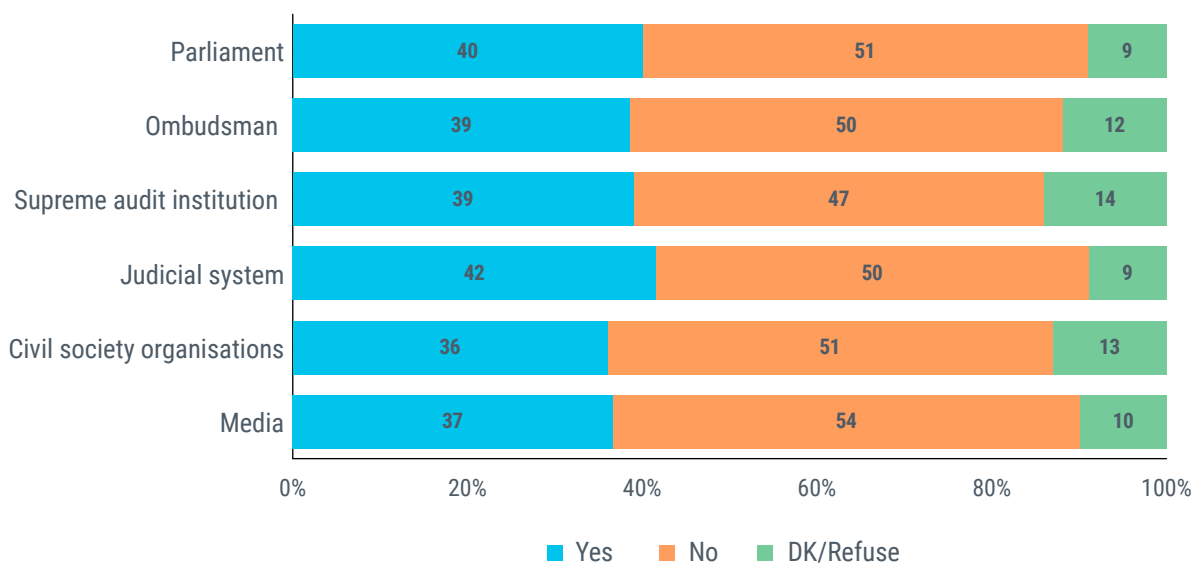
Kosovo* emerges as the leader in trust, with 39% of respondents expressing agreement that CSOs are independent of political influence, contrasted with a relatively low 36% expressing doubt, though a quarter of those surveyed did not know or refused to answer.

Similarly, respondents in Serbia and Albania exhibit relatively higher levels of trust, with 36% agreeing with CSO independence, although sizable portions express scepticism (47% and 55% respectively). Following, 33% of respondents in Montenegro agree that Civil Society Organisations are independent of political influence, while 51% express doubt, indicating a mixed perception regarding their autonomy.

On the contrary, respondents in North Macedonia and Bosnia and Herzegovina showcase lower levels of agreement, with only 22% and 27% respectively perceiving CSOs as politically independent, while a substantial majority express doubt. These findings highlight nuanced perceptions of CSOs' autonomy across the region, reflecting differing levels of trust in their ability to operate free from political influence.

FIGURE 92

The power of these Institutions to Scrutinise the Government to make it accountable to the citizens
Q37. [S PER ROW] Do you agree that the following institutions can effectively scrutinise the government and make it accountable to citizens?
(All respondents, N=6000, share of total, %)



The examination of how institutions in Western Balkan economies are viewed in terms of their ability to scrutinise the government and uphold citizen accountability reveals a widespread lack of confidence amongst the respondents (47% up to 54%), with differing degrees of trust seen across various entities (36% up to 42%).

While some institutions, such as the judicial system, supreme audit institution and ombudsman, reveal relatively higher levels of agreement, with percentages ranging from 39% to 42%, a significant portion of respondents still express doubt.

The media and civil society organisations face even greater scepticism, with only 37% and 36% respectively agreeing with their effectiveness in holding the government accountable. Similarly, the parliament falls short of inspiring confidence, with 40% expressing belief in its ability to scrutinise the government effectively, while a majority of 51% express doubt.

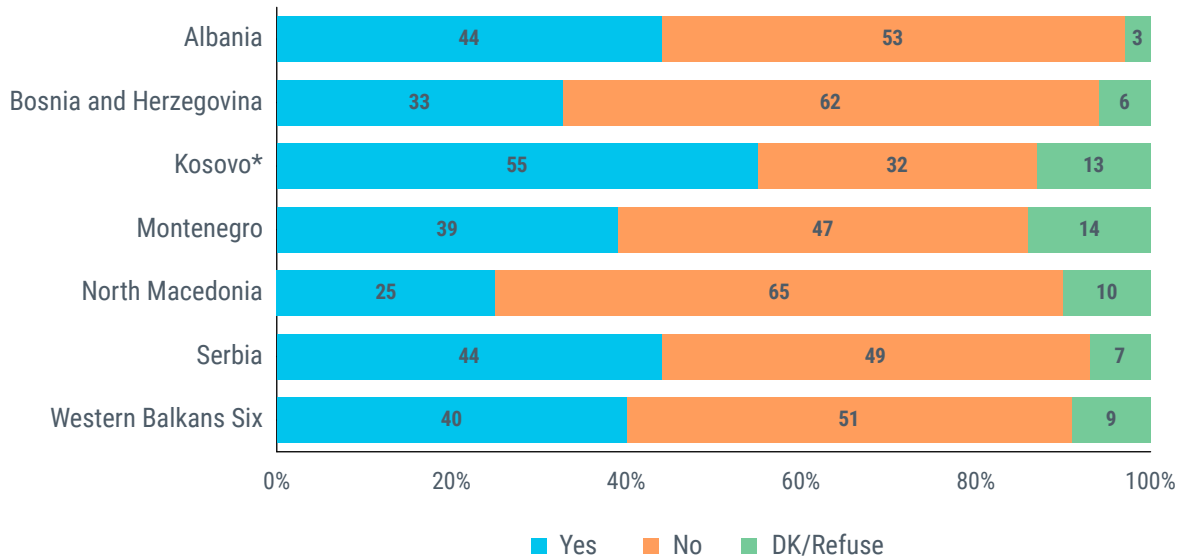


FIGURE 93

The power of Parliament to Scrutinise the Government to make it accountable to the citizens

Q37. [S PER ROW] Do you agree that the following institutions can effectively scrutinise the government and make it accountable to citizens?

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



The data on perceptions regarding parliamentary effectiveness in scrutinising the government and ensuring citizen accountability across the Western Balkan economies shows a general lack of confidence, with 40% agreeing and 51% expressing doubt.

Kosovo* emerges as the leader in trust, with 55% of respondents expressing agreement that parliaments can effectively scrutinise the government, contrasted with a relatively low 32% expressing doubt.

Similarly, respondents in Serbia and Albania exhibit relatively higher levels of trust, with 44% agreeing with parliamentary effectiveness, although sizable portions express scepticism. Montenegro presents a relatively balanced perception, with 39% of respondents agreeing with parliamentary effectiveness and 47% expressing scepticism.

In contrast, respondents in North Macedonia and Bosnia and Herzegovina showcase lower levels of agreement, with only 25% and 33% respectively perceiving parliamentary scrutiny as effective, while a substantial majority express doubt. These findings highlight nuanced perceptions of parliamentary oversight across the region, reflecting differing levels of trust in its ability to hold the government accountable.

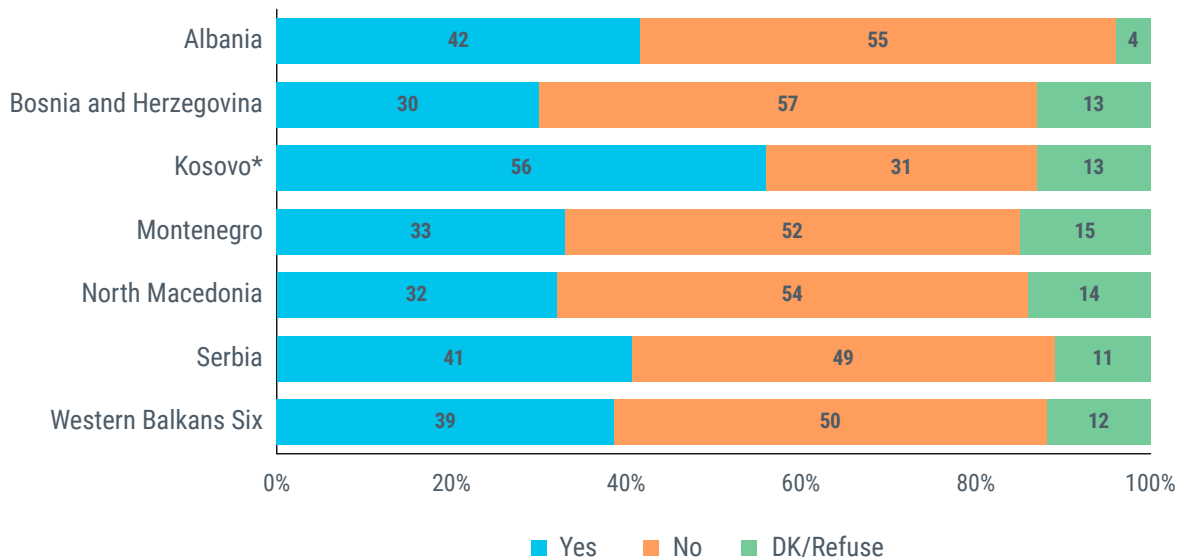


FIGURE 94

The power of Ombudsperson Institute to Scrutinise the Government to make it accountable to the citizens

Q37. [S PER ROW] Do you agree that the following institutions can effectively scrutinise the government and make it accountable to citizens?

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



In Western Balkan economies, there is a mixed perception regarding the effectiveness of Ombudsperson institution in scrutinising the government and ensuring citizen accountability, with 39% agreeing and 50% expressing doubt.

Again, Kosovo* emerges as the leader in trust, with 56% of respondents expressing agreement that the Ombudsperson can effectively scrutinise the government, contrasting with a relatively low 31% expressing doubt. The rate of implementation of Ombudsperson's recommendations in Kosovo* increased last year and Ombudsperson institution continues to play a significant role in the promotion and protection of human rights.

Similarly, respondents in Serbia and Albania exhibit relatively higher levels of trust, with 41% and 42% respectively agreeing with the Ombudsperson's effectiveness, although sizable portions express scepticism.

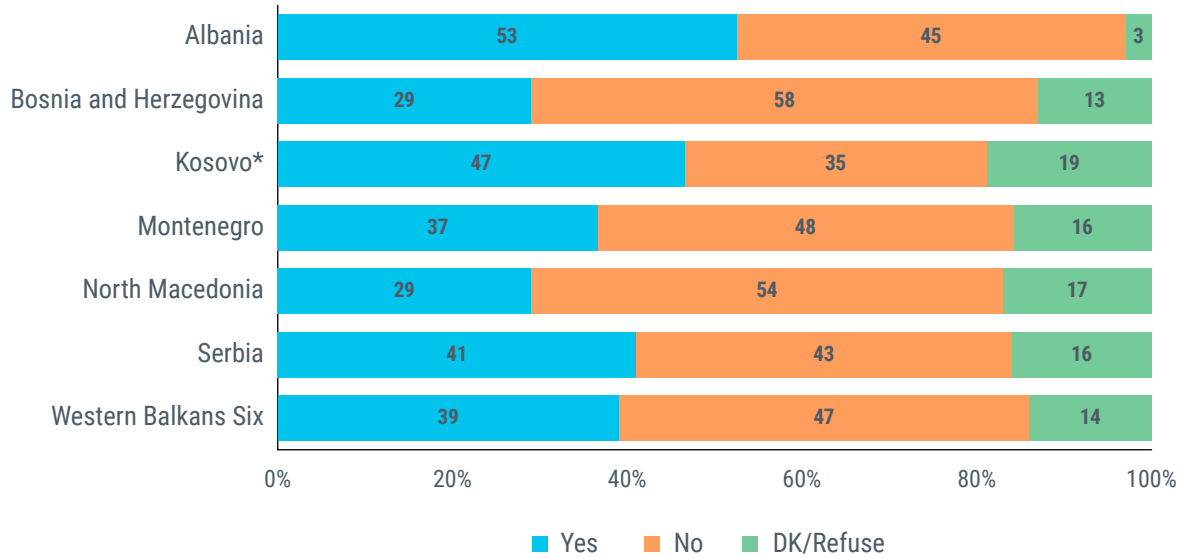
On the contrary, respondents in North Macedonia, Montenegro and Bosnia and Herzegovina showcase lower levels of agreement, with only 32%, 33% and 30% respectively perceiving the Ombudsperson as effective, while a substantial majority express doubt.



FIGURE 95

The power of Supreme Audit Institution to Scrutinise the Government to make it accountable to the citizens
Q37. [S PER ROW] Do you agree that the following institutions can effectively scrutinise the government and make it accountable to citizens?

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



In the Western Balkans Six, opinions vary regarding the efficacy of Supreme Audit institutions (SAI) in scrutinising the government and making it accountable to citizens, with 39% indicating agreement and 47% expressing disagreement.

Albania and Kosovo* emerge as leaders in trust, with 53% and 47% of respondents respectively expressing agreement that SAIs can effectively scrutinise the government, contrasting with 45% and 35% respectively expressing doubt. Similarly, respondents in Serbia and Montenegro present a relatively balanced perception with 41% and 37% respectively agreeing with SAIs' effectiveness and 43% and 48% expressing scepticism.

In contrast, respondents in North Macedonia and Bosnia and Herzegovina showcase lower levels of agreement, with only 29% perceiving SAIs as effective, while a substantial majority express doubt.

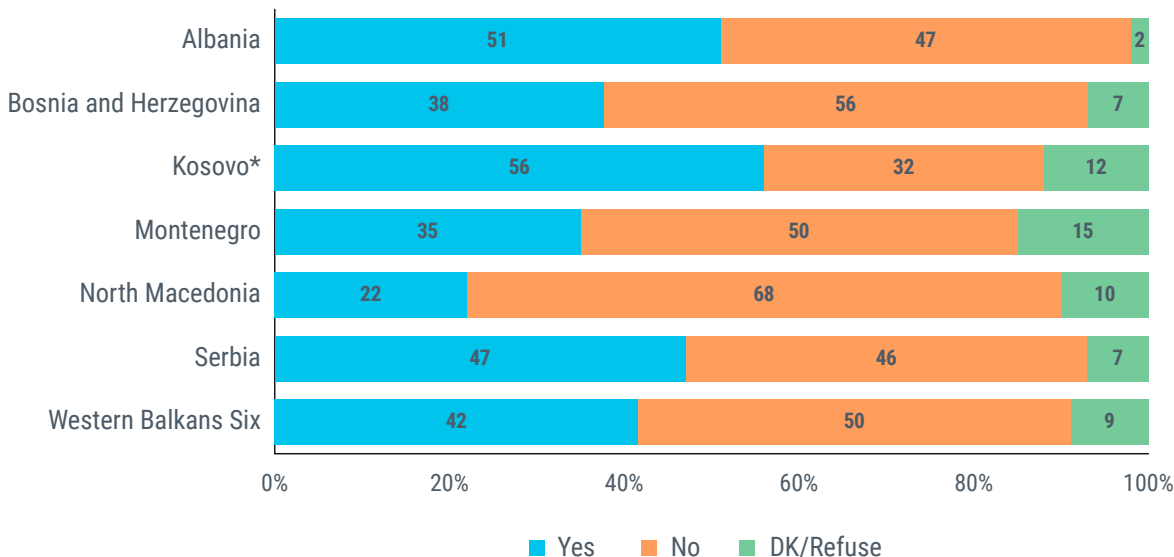


FIGURE 96

The power of Judicial System to Scrutinise the Government to make it accountable to the citizens

Q37. [S PER ROW] Do you agree that the following institutions can effectively scrutinise the government and make it accountable to citizens?

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



Across Western Balkan economies, perceptions on the effectiveness of judicial system in scrutinising the government and ensuring citizen accountability range broadly, with 42% expressing agreement and 50% expressing doubt.

Kosovo* stands out as once again a leader in trust, with 56% of respondents expressing agreement that the judicial system can effectively scrutinise the government, contrasting with a relatively low 32% expressing doubt. Similarly, respondents in Serbia and Albania again demonstrate relatively higher levels of trust, with 47% and 51% respectively agreeing with the judiciary’s effectiveness, although sizable portions express scepticism.

Respondents in Montenegro and Bosnia and Herzegovina showcase lower levels of agreement, with only 35% and 38% respectively perceiving the judicial system as effective, while a substantial majority express doubt.

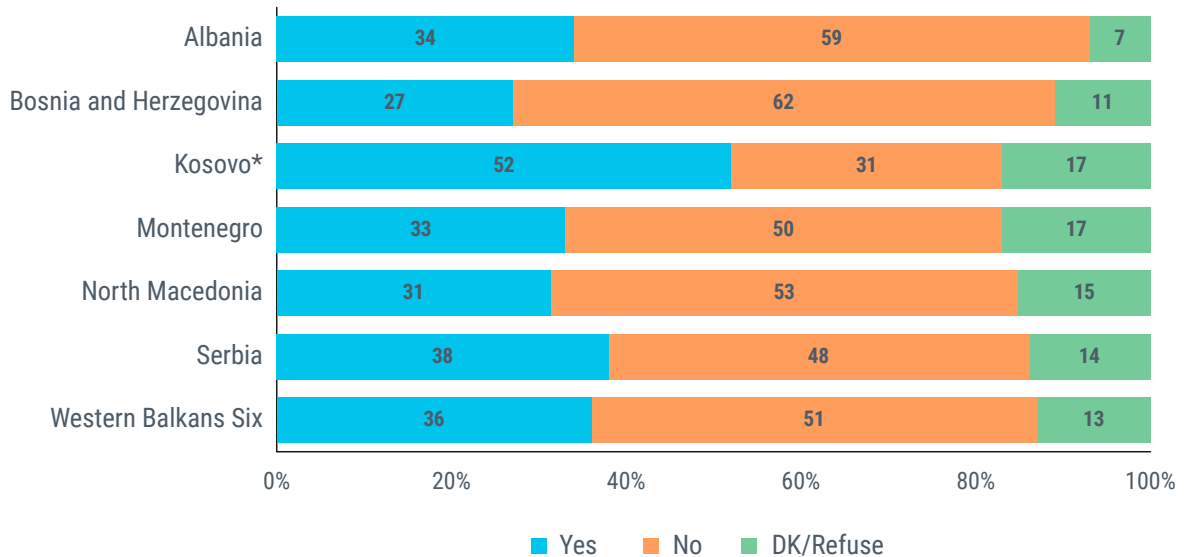
North Macedonia stands again as the outlier, with a significant 68% expressing doubt, while only 22% of respondents express agreement.



FIGURE 97

The power of Civil Society Organisations to Scrutinise the Government to make it accountable to the citizens
Q37. [S PER ROW] Do you agree that the following institutions can effectively scrutinise the government and make it accountable to citizens?

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



In the Western Balkans Six, opinions diverge on the effectiveness of civil society organisations in scrutinising the government and fostering citizen accountability, with 36% expressing agreement and 51% expressing doubt.

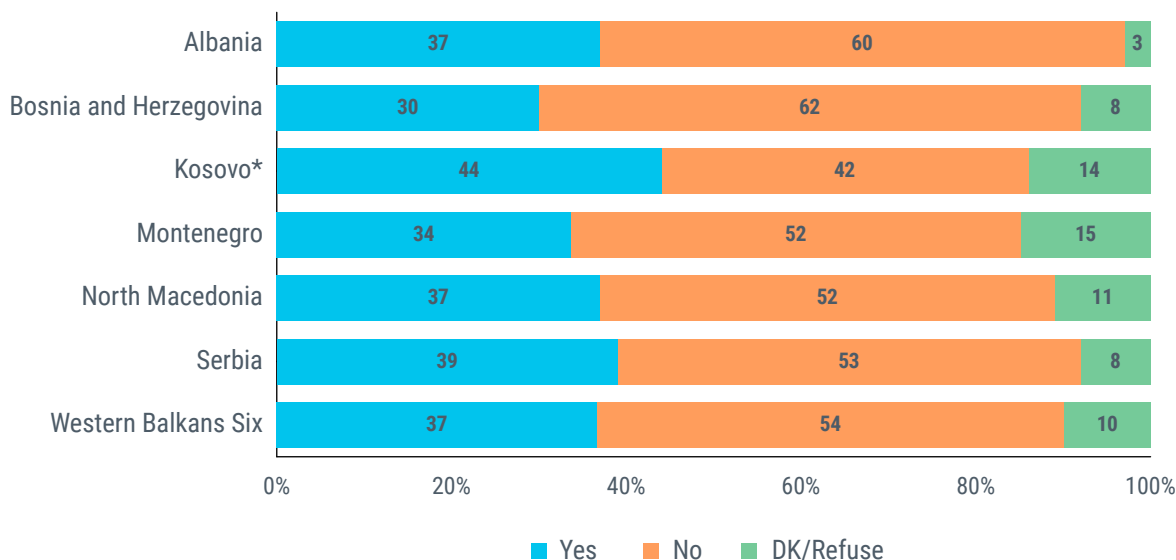
Kosovo* emerges as a standout, with a majority of respondents (52%) expressing belief in CSOs' effectiveness, contrasting with a minority (31%) expressing doubt. Respondents in Serbia, Montenegro and Albania also show relatively higher levels of trust, with 38%, 33% and 34% respectively agreeing with CSOs' efficacy, despite notable segments expressing reservations.

In contrast, respondents in North Macedonia and Bosnia and Herzegovina display lower levels of confidence, with only 31% and 27% respectively endorsing CSOs' effectiveness, while a substantial majority harbour doubt.


FIGURE 98
The power of Media to Scrutinise the Government to make it accountable to the citizens

Q37. [S PER ROW] Do you agree that the following institutions can effectively scrutinise the government and make it accountable to citizens?

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



With regard to media's effectiveness in scrutinising the government and fostering citizen accountability, there is a nuanced range of opinions across Western Balkans Six, with 37% expressing agreement and 54% expressing doubt.

Respondents in Kosovo* lead in trust, with 44% expressing agreement that the media can effectively scrutinise the government, contrasting with a relatively low 42% expressing doubt.

Similarly, respondents in Serbia, North Macedonia and Albania show relatively higher levels of trust, with 39%, 37% and 37% respectively agreeing with the media's effectiveness, though sizable portions express scepticism.

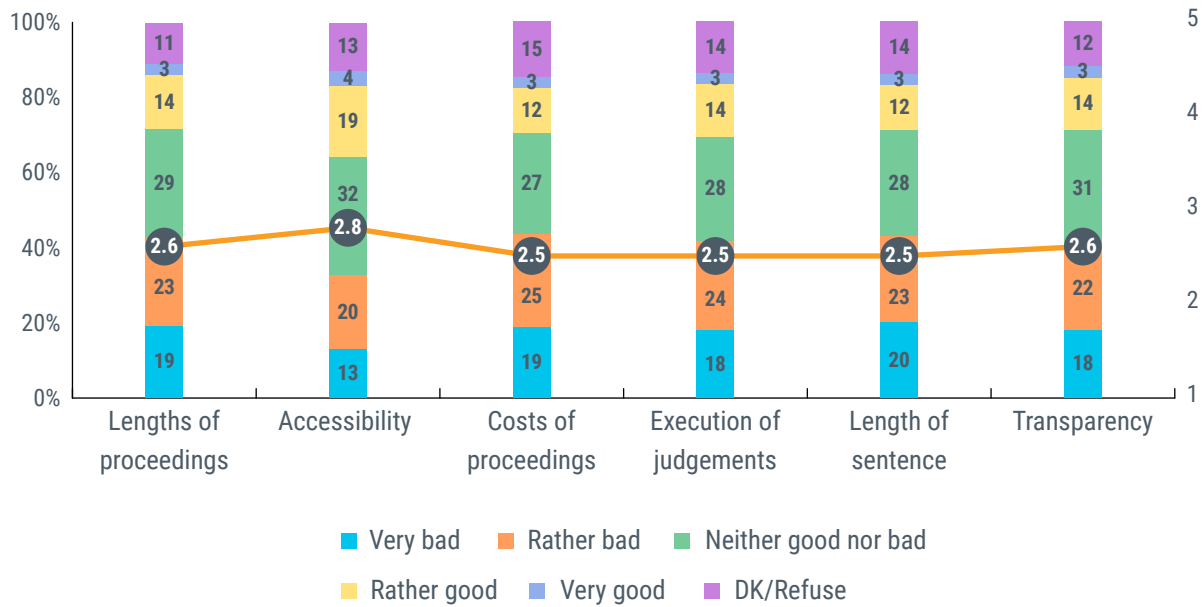
In contrast, respondents in Bosnia and Herzegovina and Montenegro exhibit lower levels of agreement, with only 30% and 34% respectively perceiving the media as effective, while a substantial majority express doubt.



FIGURE 99

Measuring Trust: How Do You Rate These Institutions? Justice System Evaluation: Rating Its Performance across Key Aspects

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



The analysis of respondents’ ratings regarding various aspects of the justice system in Western Balkan economies reveals a diverse range of perceptions. When examining components such as the length of proceedings, accessibility, cost, execution of judgments, length of sentence, and transparency, a high proportion of respondents express dissatisfaction.

For instance, concerning the costs of proceedings, 44% of respondents rate it negatively, with 19% considering it “very bad” and 25% “rather bad”. Similarly, length of proceedings, execution of judgments, and length of sentence elicit dissatisfaction, with 42%, 42% and 43% of respondents holding negative opinions, respectively. While transparency fares slightly better, it still garners criticism from 40% of respondents.

Although there are pockets of positive assessment, such as 23% of those who rate accessibility as “rather good” or “very good”, the prevalence of negative perceptions underscores significant challenges in the justice system.

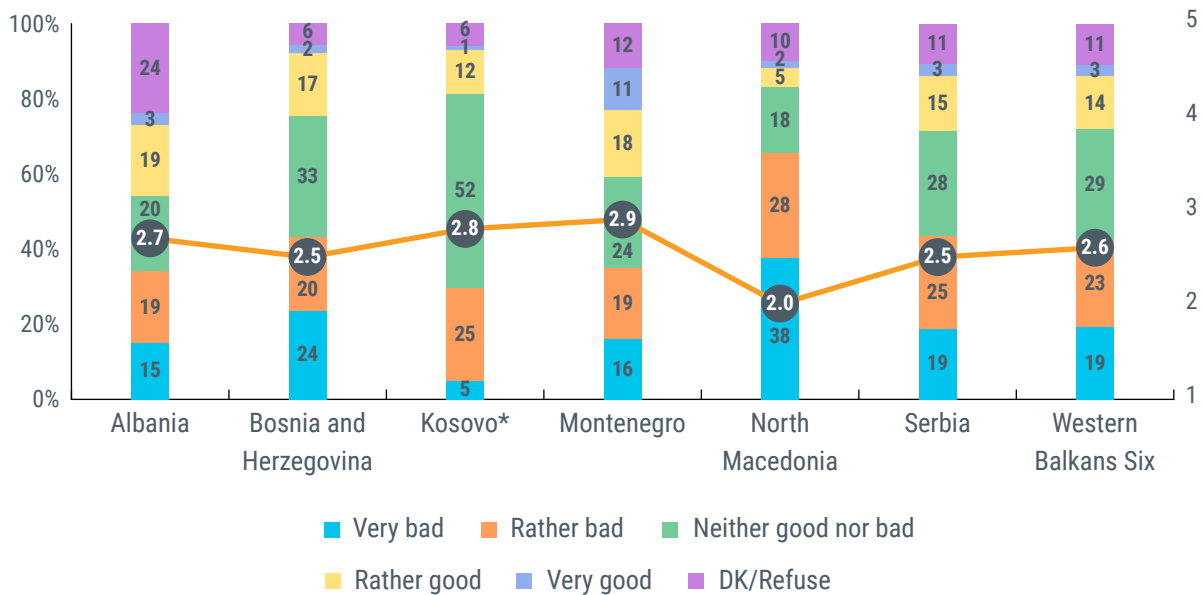


FIGURE 100

Justice System Evaluation: Rating Its Performance across Key Aspects – Length of Proceeding

Q38. [S PER ROW] How would you rate the justice system in terms of different aspects of its work?

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



In the Western Balkans Six, the analysis of respondents' evaluations on the length of proceedings of justice system reveals a mixed picture, with 19% rating it "very bad", 23% "rather bad", 29% "neither good nor bad", 14% "rather good", and 3% "very good".

In Albania, while a notable portion finds the length of proceedings acceptable or very good (20% neither good nor bad, 19% rather good, 3% very good), a substantial proportion expresses discontent, with 34% rating it as bad (15% very bad, 19% rather bad). The European Commission report for Albania highlighted that unfilled vacancies, lengthy proceedings, a low clearance rate, and many unresolved cases continue to affect the judicial system's efficiency.¹³ In 2022, the average case length at appeal level was 893 days, with criminal cases at the Tirana Appeal Court averaging 5,820 days.

Respondents in Bosnia and Herzegovina and Serbia similarly demonstrate dissatisfaction, with 43% and 44% respectively rating the length of proceedings negatively. The length of court proceedings in first-instance cases in Bosnia and Herzegovina further decreased to 378 days in 2022 (409 in 2021, 434 in 2020), but is still high.¹⁴ Whereas, in Serbia, the efficiency, quality, and accessibility of justice is hindered by prolonged proceedings and delays in processing indemnity claims.¹⁵

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¹³ European Commission, Albania 2023 Report, https://neighbourhood-enlargement.ec.europa.eu/system/files/2023-11/SWD_2023_690%20Albania%20report.pdf

¹⁴ European Commission, Bosnia and Herzegovina 2023 Report, https://neighbourhood-enlargement.ec.europa.eu/system/files/2023-11/SWD_2023_691%20Bosnia%20and%20Herzegovina%20report.pdf

¹⁵ European Commission, Serbia 2023 Report, https://neighbourhood-enlargement.ec.europa.eu/document/download/9198cd1a-c8c9-4973-90ac-b6ba6bd72b53_en?filename=SWD_2023_695_Serbia.pdf



Respondents in Kosovo* exhibit the lowest level of discontent with the length of proceedings (5% very bad, 25% rather bad), with significant proportion of respondents expressing neutrality (52% neither good nor bad), while the rest rate it positively (12% rather good, 1% very good).

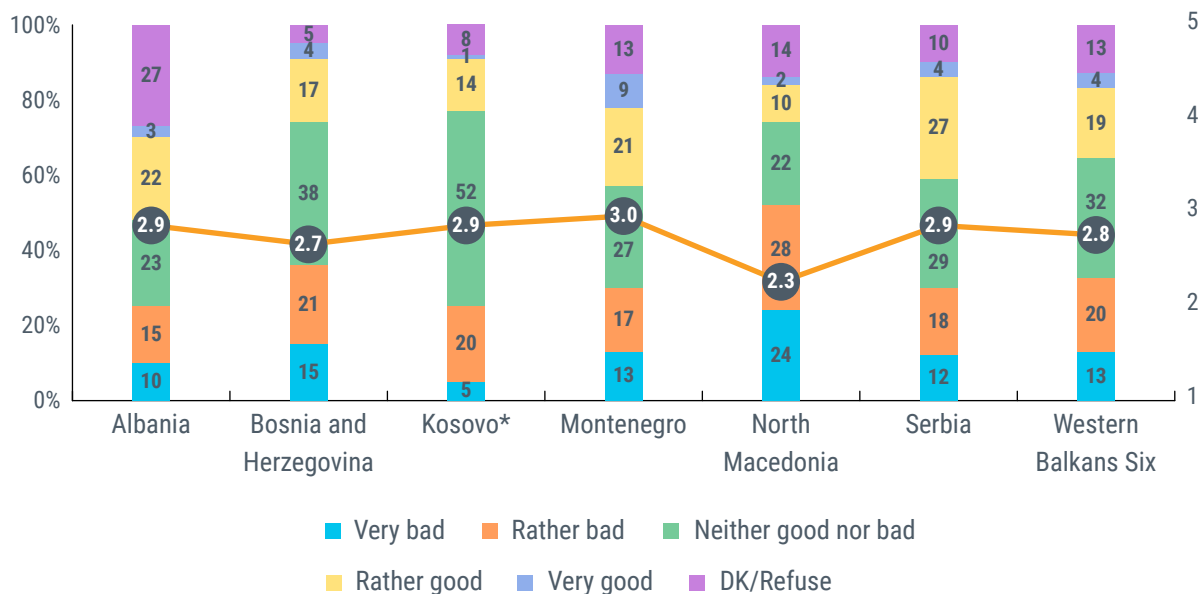
Conversely, respondents in Montenegro display more positive evaluations, with 29% expressing satisfaction (18% rather good, 11% very good), and North Macedonia registering the highest dissatisfaction rate (66%). Overall, while there are pockets of positive assessment, a considerable proportion of respondents express discontent with the length of proceedings.

FIGURE 101

Justice System Evaluation: Rating Its Performance across Key Aspects – Accessibility

Q38. [S PER ROW] How would you rate the justice system in terms of different aspects of its work?

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



Across the Western Balkan economies, opinions on the accessibility of justice system vary, with 13% rating it “very bad”, 20% “rather bad”, 32% “neither good nor bad”, 19% “rather good”, and 4% “very good”.

North Macedonia stands out with the highest percentage (52%) of respondents evaluating accessibility of justice system negatively. In Albania and Bosnia and Herzegovina, significant proportions of respondents rate accessibility negatively, with 25% and 36%, respectively, rating it as either “very bad” or “rather bad”.

Conversely, Montenegro and Serbia receive more positive evaluations, with 30% and 31%, respectively, rating accessibility positively. In Kosovo* a notable percentage (52%) of respondents express neutrality, indicating a lack of strong opinions on accessibility.

Overall, while there are differences amongst economies, the prevailing sentiment suggests that improvements are needed to enhance the accessibility of justice system across the Western Balkans Six, particularly in economies where dissatisfaction rates are high.

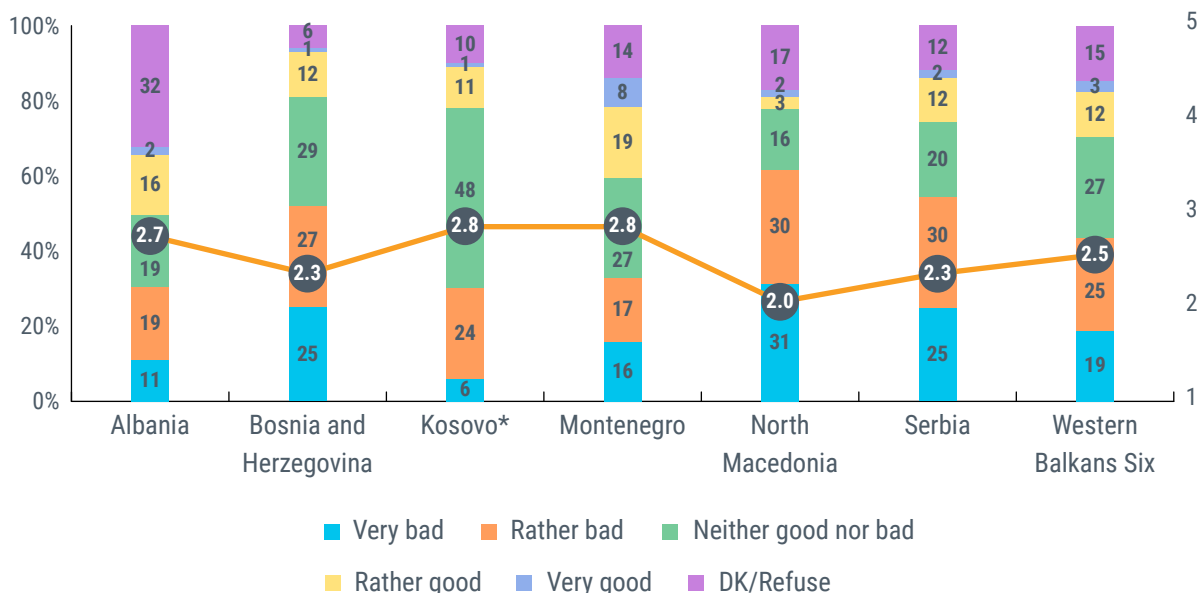


FIGURE 102

Justice System Evaluation: Rating Its Performance across Key Aspects – Costs of Proceedings

Q38. [S PER ROW] How would you rate the justice system in terms of different aspects of its work?

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



Overall, while some respondents across the Western Balkans Six perceive the costs of proceedings more favourably, a substantial portion remains dissatisfied, with 19% rating it “very bad”, 25% “rather bad”, 27% “neither good nor bad”, 12% “rather good”, and 3% “very good”.

In Bosnia and Herzegovina, North Macedonia and Serbia, the costs of proceedings receive the highest levels of criticism, with 52%, 61% and 55% respectively rating it as “very bad” or “rather bad”.

Montenegro stands out as the most positively evaluated in this aspect, with 27% of respondents expressing satisfaction (19% “rather good” and 8% “very good”); however, even in Montenegro, significant room for improvement remains, as 33% rate it as “very bad” or “rather bad”.

Respondents in Kosovo* display neutrality sentiment, with 48% rating the costs of proceedings as “neither good nor bad”.

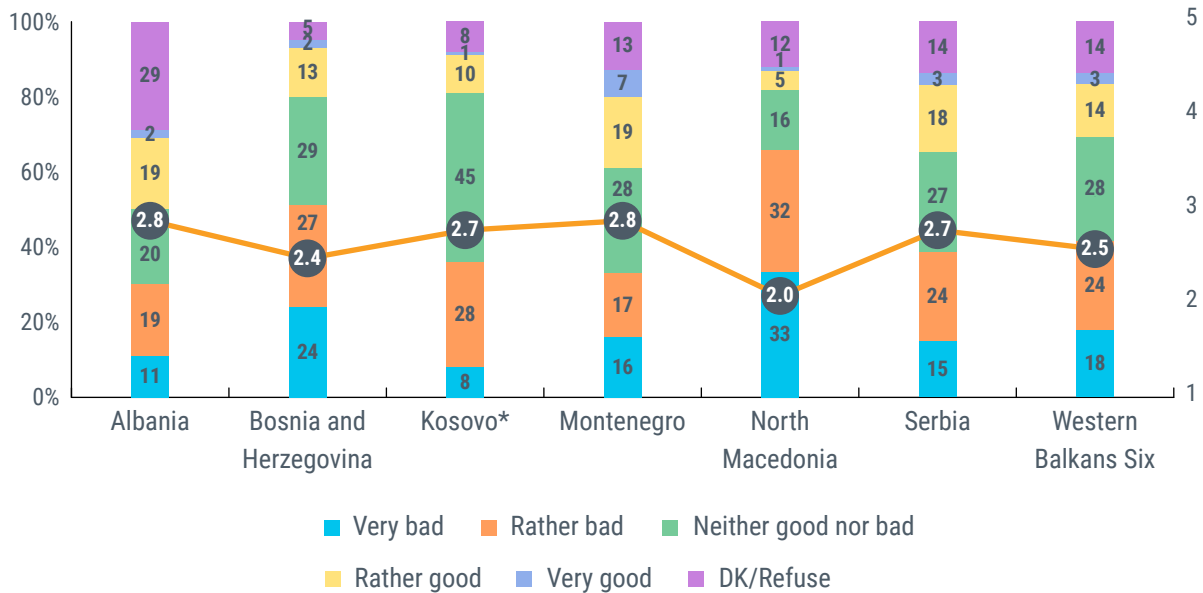


FIGURE 103

Justice System Evaluation: Rating Its Performance across Key Aspects – Execution of Judgements

Q38. [S PER ROW] How would you rate the justice system in terms of different aspects of its work?

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



Perceptions of the justice system’s execution of judgments amongst Western Balkan citizens vary, with 18% rating it as “very bad”, 24% as “rather bad”, 28% as “neither good nor bad”, 14% as “rather good”, and 3% as “very good”.

North Macedonia stands out with the highest levels of criticism among respondents, as 33% rate the execution of judgments as “very bad” and 32% as “rather bad”. Similarly, respondents in Bosnia and Herzegovina record substantial dissatisfaction, with 24% rating it as “very bad” and 27% as “rather bad”. Respondents in Kosovo* and Serbia also demonstrate notable dissatisfaction, with 8% and 15% respectively rating the execution of judgments as “very bad.”

When compared with the region, respondents in Montenegro exhibit more favourable perceptions, with 26% expressing satisfaction. However, despite this, a significant portion still rates it negatively, with 16% and 17% respectively rating it as “very bad” and “rather bad”.

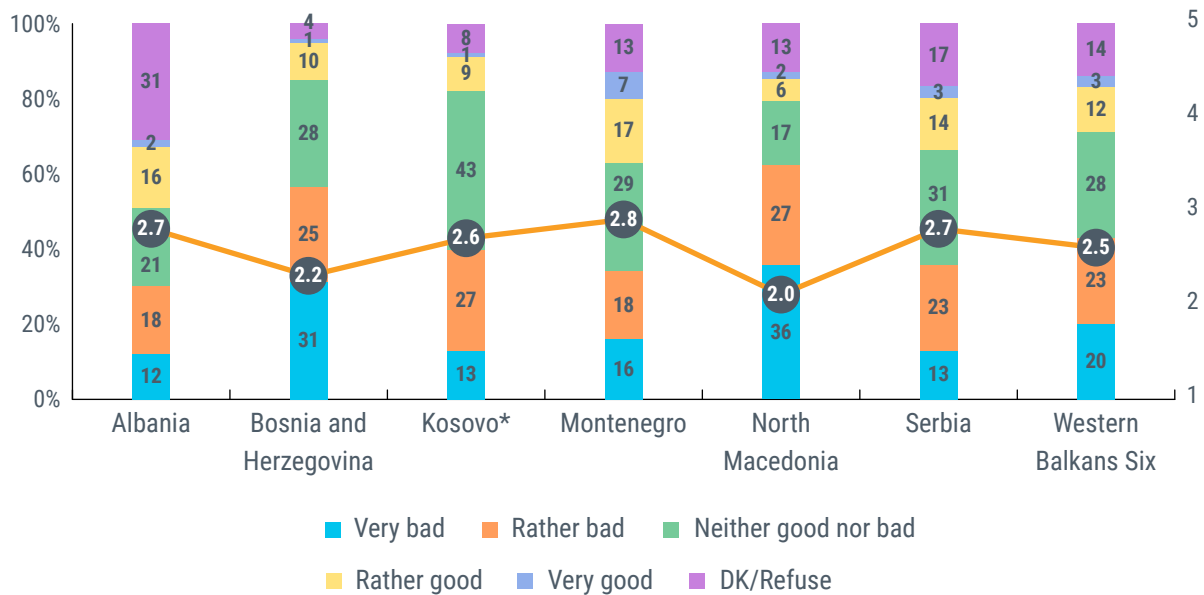


FIGURE 104

Justice System Evaluation: Rating Its Performance across Key Aspects – Length of Sentence

Q38. [S PER ROW] How would you rate the justice system in terms of different aspects of its work?

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



The Western Balkans shows a diverse range of opinions on the justice system, with 20% rating the length of sentences as “very bad”, 23% as “rather bad”, 28% as “neither good nor bad”, 12% as “rather good”, and 3% as “very good”.

While Albania demonstrates a relatively balanced viewpoint, with 12% rating it as “very bad”, 18% as “rather bad”, and 16% as “rather good” and 2% as “very good”, there is a considerable variation in opinions in other economies. Montenegro presents a more positive outlook, with 17% of respondents rating it as “rather good” and 7% as “very good”.

In contrast, respondents in Bosnia and Herzegovina and North Macedonia indicate a notably negative perception, with 56% and 63% respectively rating it as “very bad” or “bad”.

Serbia’s responses are relatively distributed, although 31% rated it as “neither good nor bad”. Respondents in Kosovo* show a neutral sentiment with 43% rating the length of sentence as “neither good nor bad”.

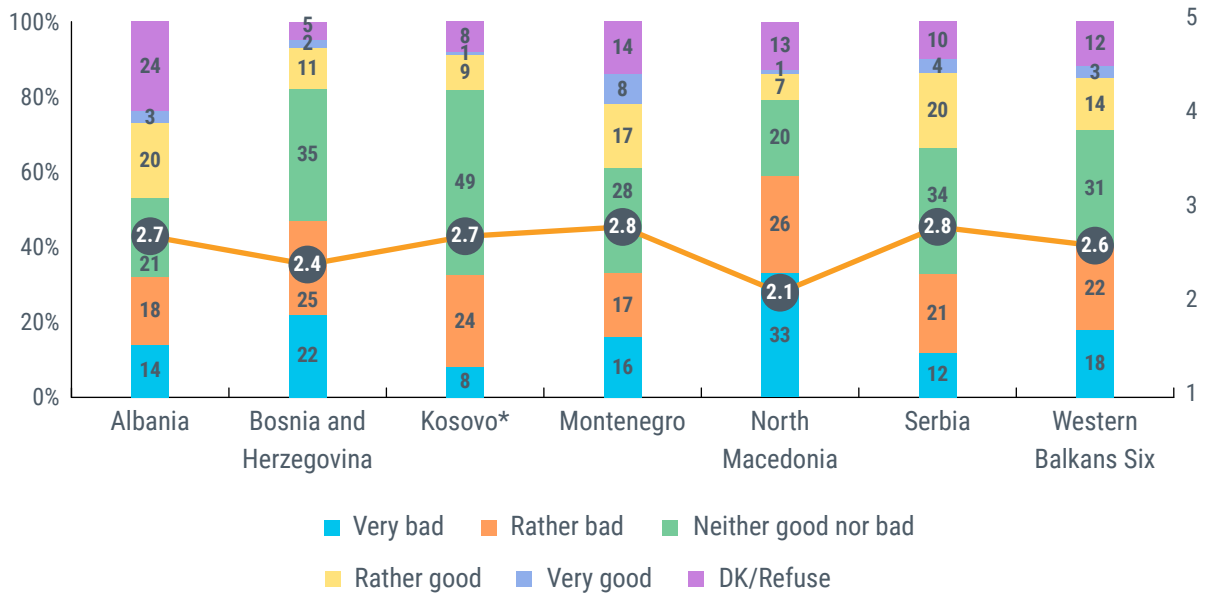


FIGURE 105

Justice System Evaluation: Rating Its Performance across Key Aspects – Transparency

Q38. [S PER ROW] How would you rate the justice system in terms of different aspects of its work?

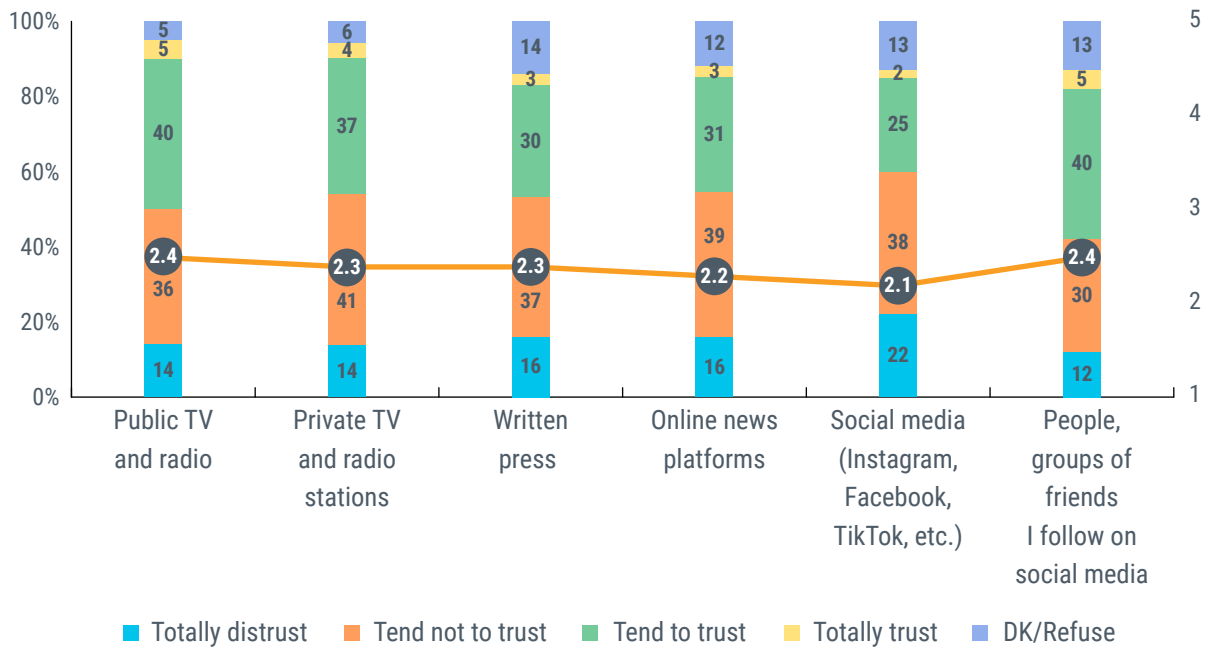
(All respondents, N=6000, scale from 1 to 5, share of total, %, mean)



Across the Western Balkans, views on the justice system’s transparency are diverse, with 18% rating it as “very bad”, 22% as “rather bad”, 31% as “neither good nor bad”, 14% as “rather good”, and 3% as “very good”.

In Albania, opinions are fairly evenly distributed, with 14% rating it as “very bad”, 18% as “rather bad”, and 20% as “rather good”. Respondents in Bosnia and Herzegovina demonstrate a slightly more negative perception, with 22% rating it as “very bad” and 25% as “rather bad”. A significant proportion of respondents in Kosovo* (49%) is rating it as “neither good nor bad”, while respondents in Montenegro and Serbia show a more balanced outlook, with varying levels of positive ratings.

Notably, respondents in North Macedonia exhibit a negative sentiment, with 33% rating the transparency of justice system as “very bad” and 26% as “bad”.


FIGURE 106
Trust and Reliability: Evaluating Your Information Sources
Q39. [S PER ROW] How much trust and reliability of information do you have in the following sources?
(All respondents, N=6000, scale from 1 to 4, share of total, %, mean)


The data reveals varying degrees of trust and reliability of information amongst the respondents in Western Balkan economies across different sources.

Public TV and radio and people, groups of friends followed on social media appear to garner the highest level of trust, with 40% tending to trust and 5% expressing total trust, although a significant portion also tends not to trust. Similarly, private TV and radio stations receive a similar level of trust, with 37% tending to trust, but with a higher percentage tending not to trust (41%).

The written press and online news platforms also exhibit a notable level of trust (33%), although lower compared to traditional broadcast media.

Social media platforms, on the other hand, face the highest level of distrust, with 22% totally distrusting them, and only 2% expressing total trust. Trust in information shared by people or groups followed on social media is relatively higher, with 40% tending to trust, suggesting a preference for information shared within personal networks over broader social media platforms.

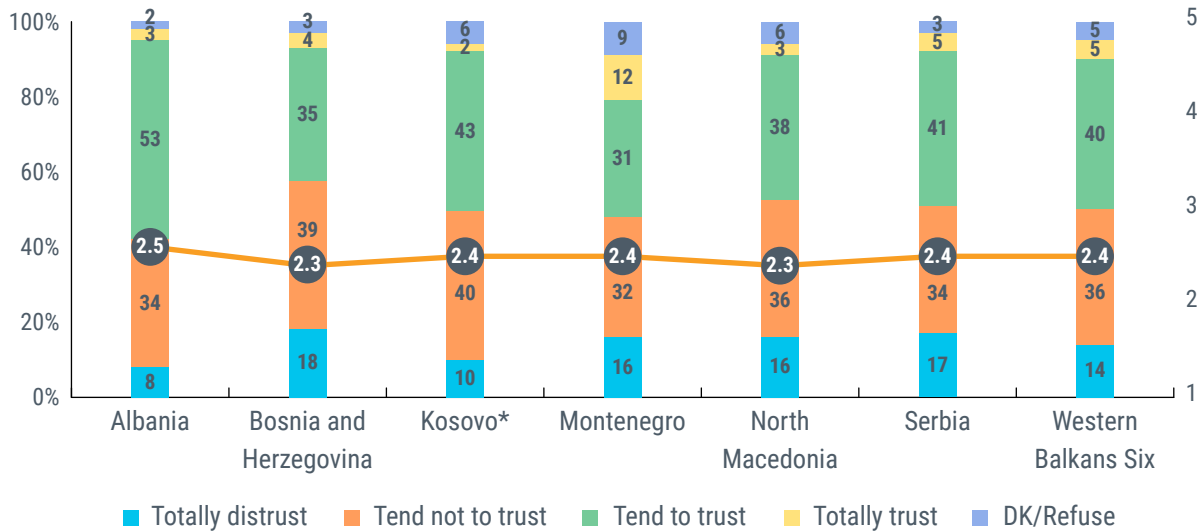


FIGURE 107

Trust and Reliability: Evaluating Your Information Sources – Public TV and Radio

Q39. [S PER ROW] How much trust and reliability of information do you have in the following sources?

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



In Western Balkans Six, 40% of respondents tend to trust public TV and radio, while 14% totally distrust it, reflecting a significant level of variation in perceptions regarding the trust and reliability of information from this source amongst the population.

Across all economies surveyed, respondents put some level of trust in public TV and radio as a reliable source of information, with percentages ranging from 43% to 56%. However, there is also a considerable portion of respondents who totally distrust or tend not to trust, with percentages ranging from 45% to 52%.

Notably, respondents in Albania, Kosovo* and Serbia exhibit the highest levels of trust, with 56%, 45% and 46% respectively trusting public TV and radio. Conversely, respondents in Montenegro demonstrate the highest level of total trust at 12%, while respondents in Bosnia and Herzegovina have the highest percentage of total distrust at 18%.

Overall, while public TV and radio are generally trusted sources of information, there is a notable proportion of respondents who remain sceptical or express distrust.

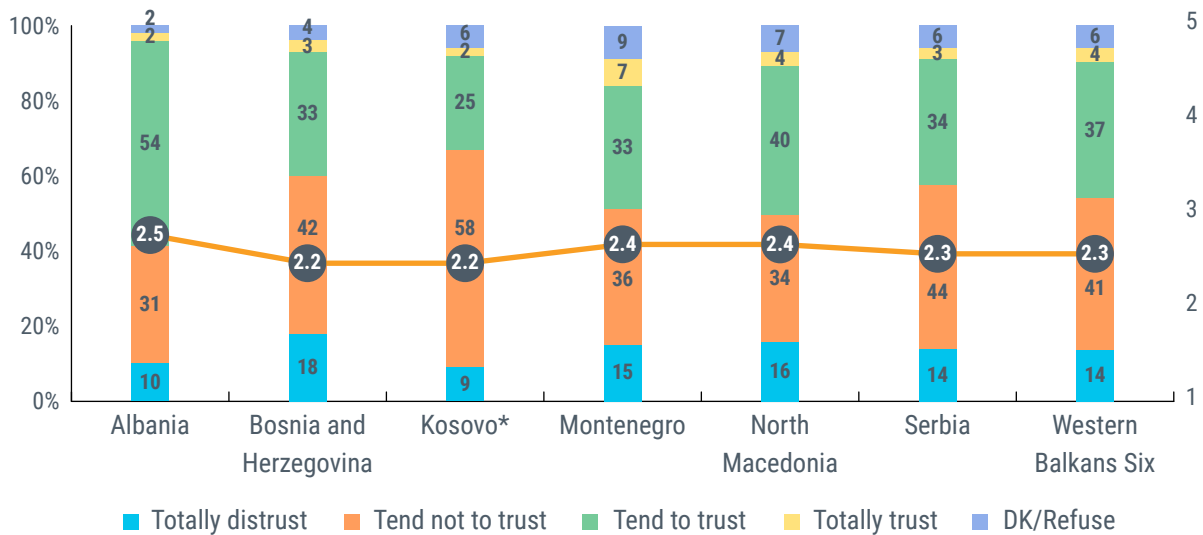


FIGURE 108

Trust and Reliability: Evaluating Your Information Sources – Private TV and Radio

Q39. [S PER ROW] How much trust and reliability of information do you have in the following sources?

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



The Western Balkans Six exhibit diverse levels of trust and reliability in media sources, with the latest data indicating that 14% of respondents totally distrust, 41% tend not to trust, 37% tend to trust, and 4% totally trust private TV and radio stations.

Albania stands out from other economies in the Western Balkans with its relatively higher level of trust and reliability in private TV and radio stations, as indicated by 56% of respondents tending to trust or totally trusting, compared to 41% who tend not to trust or totally distrust.

Respondents in Bosnia and Herzegovina, Montenegro, North Macedonia, and Serbia collectively demonstrate a similar trend in their levels of trust in and reliability of information from private TV and radio stations, with significant proportions indicating distrust (ranging from 50% to 60%) and relatively lower levels of trust (ranging from 36% to 44%), suggesting a prevailing scepticism or lack of confidence in these media sources across these economies in the Western Balkans.

Notably, respondents in Kosovo* display a distinctive pattern with the lowest level of trust (27%) and the highest tendency of distrust (67%) in private TV and radio stations amongst Western Balkan economies, suggesting notable scepticism or dissatisfaction with these media sources.

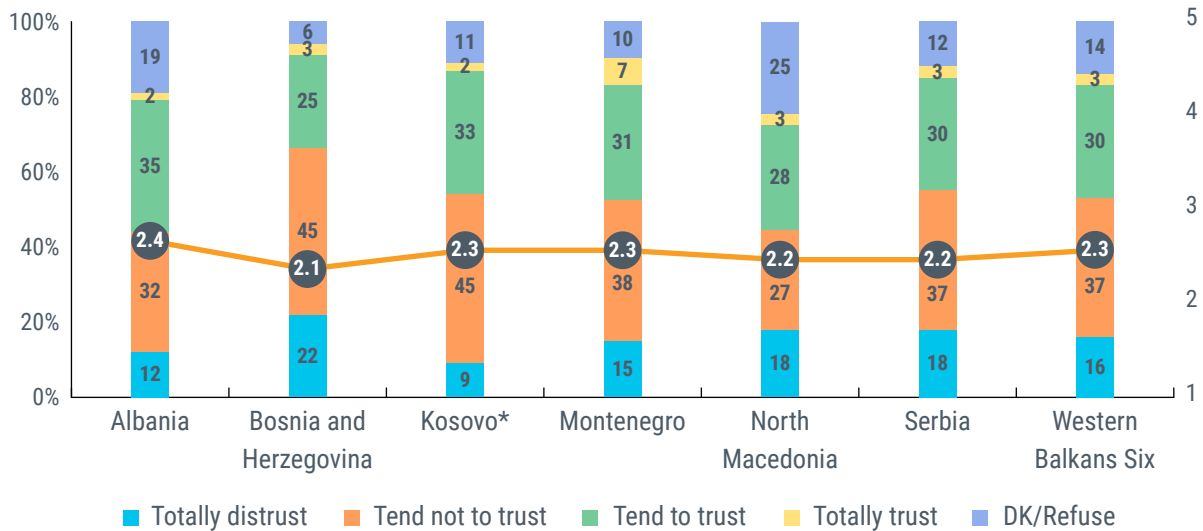


FIGURE 109

Trust and Reliability: Evaluating Your Information Sources – Written Press

Q39. [S PER ROW] How much trust and reliability of information do you have in the following sources?

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



In the Western Balkans Six, respondents express varying degrees of scepticism towards the reliability of information from the written press, with 16% totally distrusting, 37% tending not to trust, 30% tending to trust, and only 3% expressing total trust.

Bosnia and Herzegovina stands out with the highest percentage of respondents expressing total distrust at 22%, followed closely by Serbia and North Macedonia at 18% each. Respondents in Montenegro also exhibit relatively high levels of total distrust, with 15%.

Respondents in Albania and Kosovo* show lower levels of total distrust, 12% and 9% respectively, when compared with other economies.

While there are differences in the exact percentages, there is a consistent trend across these economies indicating a significant portion of the population harbouring doubts about the trustworthiness of the written press as a source of information.

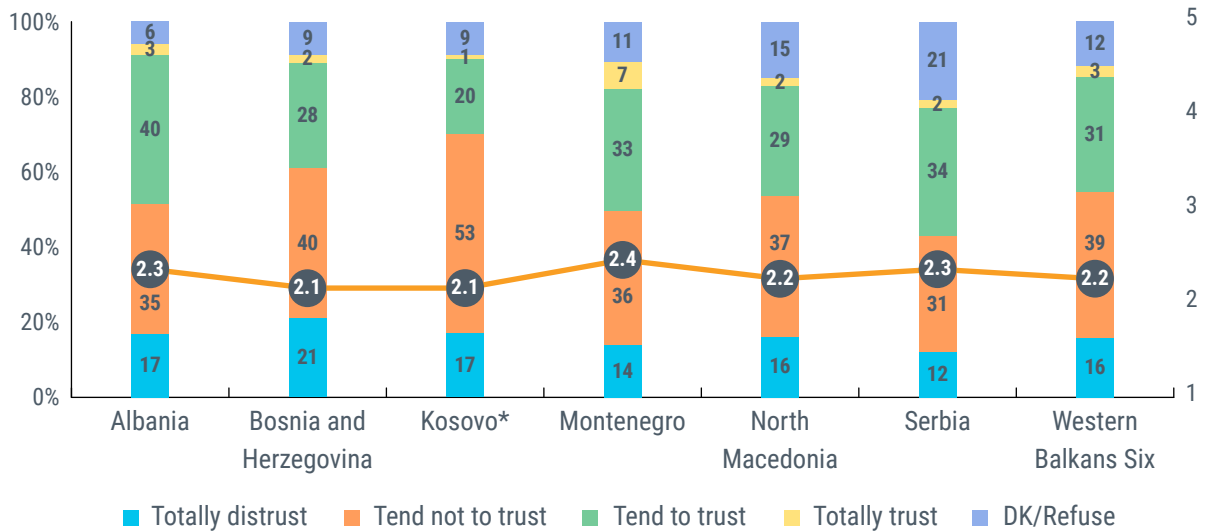


FIGURE 110

Trust and Reliability: Evaluating Your Information Sources – Online News Platforms

Q39. [S PER ROW] How much trust and reliability of information do you have in the following sources?

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



In the Western Balkans Six region trust in online news platforms varies, with trust levels ranging from 31% to 43% across different economies.

In Albania, Bosnia and Herzegovina, Montenegro, North Macedonia, and Serbia, between 43% and 61% of respondents do not trust online news platforms, indicating a substantial degree of scepticism.

Notably, Kosovo* stands out with the highest percentage of respondents expressing distrust, at 70%, and the lowest percentage of trust, at 21%.

Conversely, respondents in Albania and Montenegro show a relatively higher level of trust, with 43% and 40% of respondents respectively trusting online news platforms.

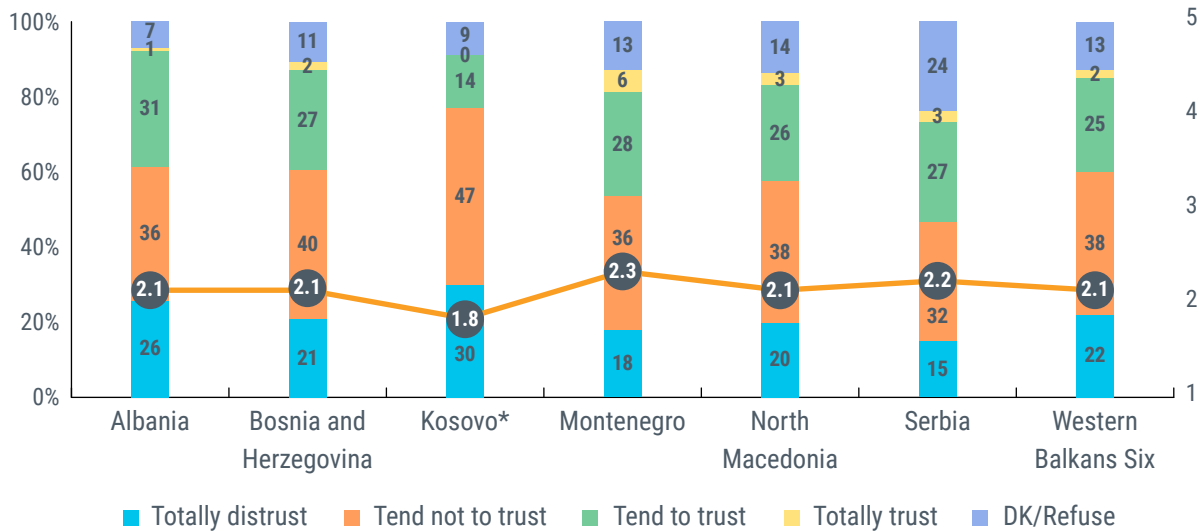


FIGURE 111

Trust and Reliability: Evaluating Your Information Sources – Social Media

Q39. [S PER ROW] How much trust and reliability of information do you have in the following sources?

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



The data on trust and reliability of information on social media platforms across Western Balkan economies reveals a significant level of scepticism amongst the respondents. Across the board, there is a considerable percentage of individuals who totally distrust social media, ranging from 15% to 30% in individual economies, with Kosovo* demonstrating the highest level of total distrust at 30%.

Additionally, tend-not-to-trust percentages range from 32% to 47%, indicating a widespread lack of confidence in the reliability of information disseminated through social media channels. Interestingly, Kosovo* stands out again with the highest percentage of distrust responses (77%).

On the other hand, trust percentages vary from 14% to 34%, with Montenegro having the highest level of trust at 34%. However, even in Montenegro, the majority of respondents either tend not to trust or totally distrust social media platforms (54%).

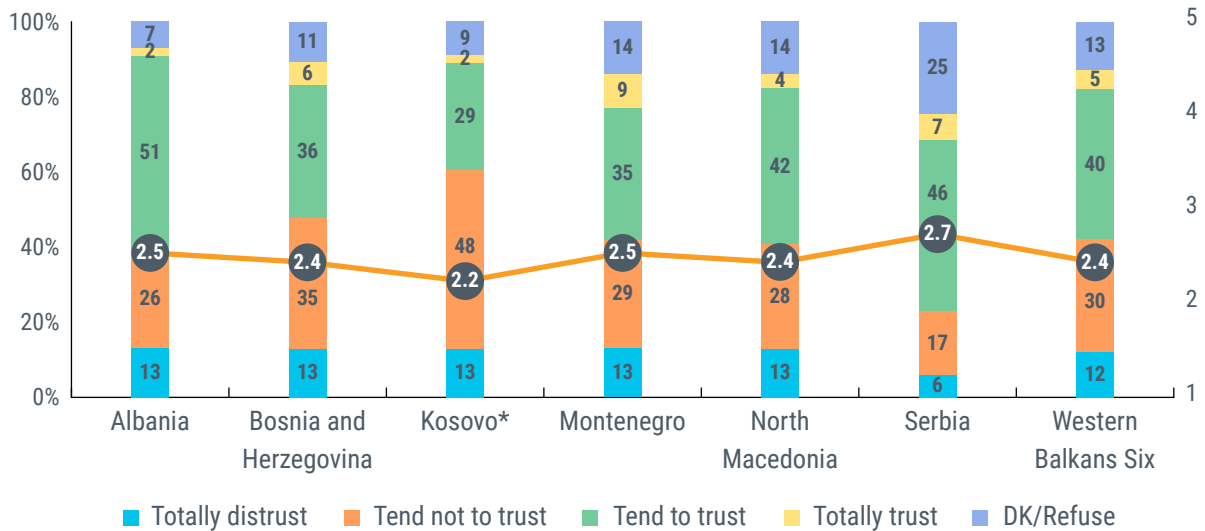


FIGURE 112

Trust and Reliability: Evaluating Your Information Sources – People and groups of friends I follow on social media

Q39. [S PER ROW] How much trust and reliability of information do you have in the following sources?

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



Across Western Balkan economies, trust in information from people and groups followed on social media varies. Generally, there is a higher level of trust compared to distrust or tendency not to trust.

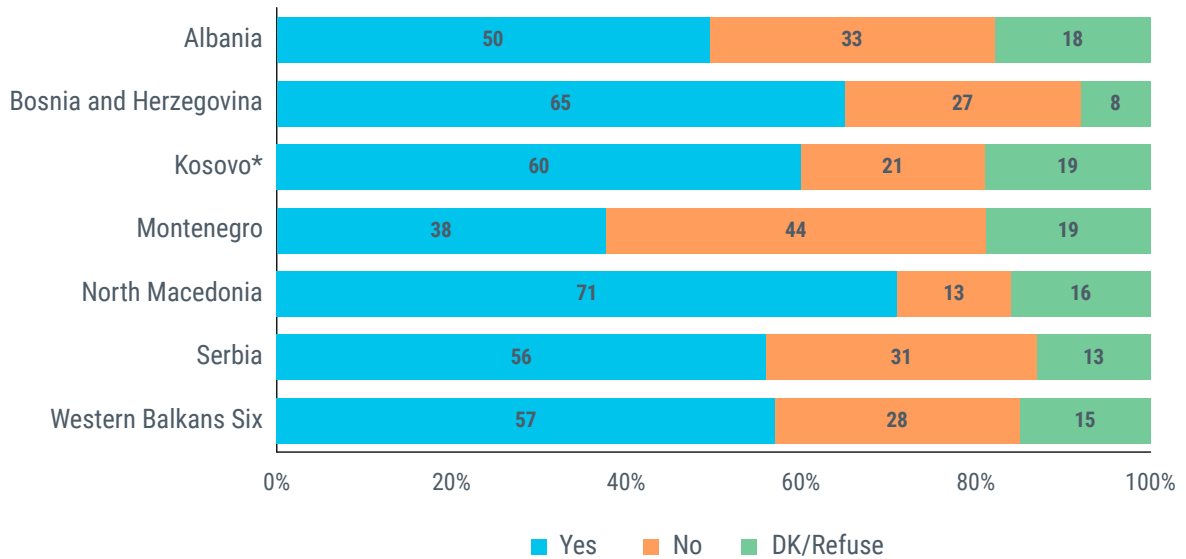
Notably, respondents in Albania and Serbia exhibit the highest level of trust at 53%, followed by Montenegro and North Macedonia at 44% and 46% respectively.

However, there is still a notable percentage of respondents who either totally distrust or tend not to trust information from these sources, indicating a degree of scepticism. For instance, Bosnia and Herzegovina and Kosovo* have 48% and 61% distrust responses, respectively.



FIGURE 113

The Surge of Fake News and Disinformation
Q40. [S] In your view, has there been a raise of fake news and disinformation in [ECONOMY] in the past 12 months?
(All respondents, N=6000, share of total, %)



The data reveals a concerning trend regarding the prevalence of fake news and disinformation across Western Balkan economies over the past 12 months. A significant majority of respondents, comprising 57%, expressed agreement with the notion that there has been a rise in fake news and disinformation. However, this perception is lower compared to 2023, with 8 points less (previously 65% claimed that fake news and disinformation had increased in the past 12 months).

This sentiment is echoed across individual economies, with figures ranging from 38% in Montenegro to as high as 71% in North Macedonia. Only a minority of respondents, ranging from 13% in North Macedonia to 44% in Montenegro, reported not observing such a rise.

Systematic disinformation campaigns, often by foreign entities as part of hybrid warfare, including cyber-attacks, are impacting Western Balkan economies by influencing societal debates, creating divisions, and interfering with democratic processes.¹⁶

¹⁶ Metamorphosis Foundation for Internet and Society, "Geopolitical Perspective of Disinformation Flows in the Western Balkans", 2023, <https://metamorphosis.org.mk/wp-content/themes/metamorphosis/download.php?id=42384>



NOTE ON METHODOLOGY

Quantitative research methodology was used for Public Opinion Survey as well as CAPI (Computer-Assisted Personal Interviewing) as the data collection method. The survey was conducted via personal household interviews carried out by trained interviewers from Data Centrum Research Institute, between March and April 2024, in Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, North Macedonia and Serbia.

Fieldwork and data collection was implemented between 5 March and 4 April.

Questionnaire

The survey questionnaire was provided by the RCC. The Public Opinion Survey questionnaire was composed of a total of 43 questions, including the extra section and the demographics (region, size of settlement, gender, age, education, nationality, marital status, household income and self-assessed social status of the respondent).

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

RCC reviewed and approved all the translations of the questionnaires.

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

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

Duration of Interview: 20-25 minutes

Response Rate: 22% on average

Interviewers

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

Pilot Testing

A pre-test of up to 50 interviews with the general population was conducted, which is not included in the final sample. Respondents from different age groups and genders were included in the pilot phase.



Sample

Public Opinion Survey was conducted amongst N=1000 respondents in each economy, aged 18+ with the total of 6,000 respondents for the entire SEE region.

For the Public Opinion Survey, the target respondents were the following:

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

Stratification/selection procedure:

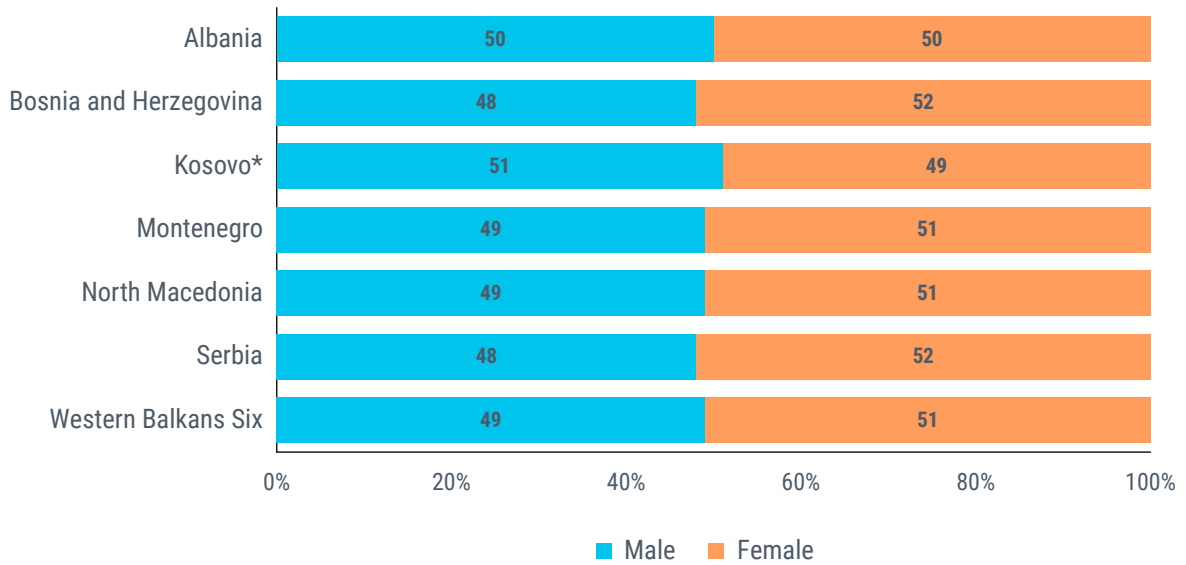
To achieve a fully representative sample of the targeted population, a multistage stratified cluster was applied by using the last official census data in each economy. Administrative area/regions and cities/villages were selected and a certain number of starting points was pre-selected in each city and village based on the population of the area. Selection of households was done using the random route method; the interviewer started selecting the households to participate in the research from each starting point by 'knocking' on every third household. The selection of respondents was done using the birthday method – the family member who has the nearest coming birthday. The number of respondents was calculated proportionally based on the number of inhabitants in each settlement in the region/county, while the number of sampling points was defined based on the obtained number of respondents (for each region/ county and each size of settlement). The maximum number of respondents per one sampling point was 5-10 on average.



Serbia, one can observe that the region of Centralna i Zapadna Srbija is slightly ahead of Vojvodina, with 27.5% of total respondents compared to Vojvodina’s 25.8%, followed by Beograd with 25.4% of total respondents. In Kosovo*, the capital city Prishtina leads the way with 28.4% of total respondents, followed by the city of Prizren with 22%, and Peje with 12.4%. All three Kosovo* cities together make up 62.8% of the total respondents of this economy.

FIGURE 115

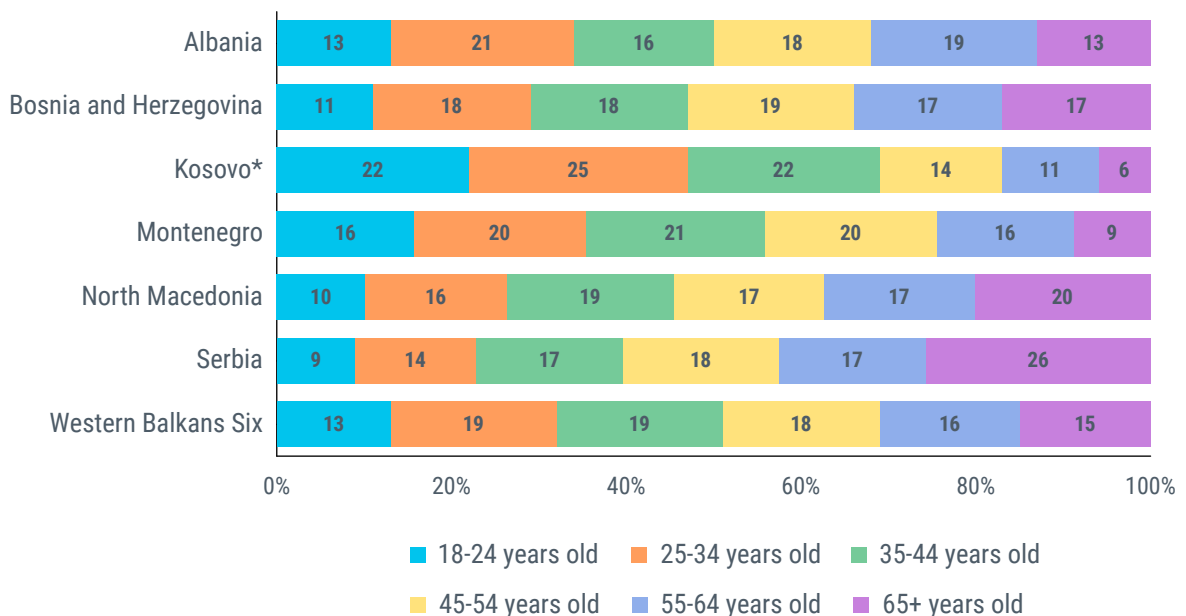
Sample Structure by Gender



The graph above clearly indicates an almost equal distribution for both genders in each of the Western Balkans Six with an average of 49% of males and 51% of females for the entire region.

FIGURE 116

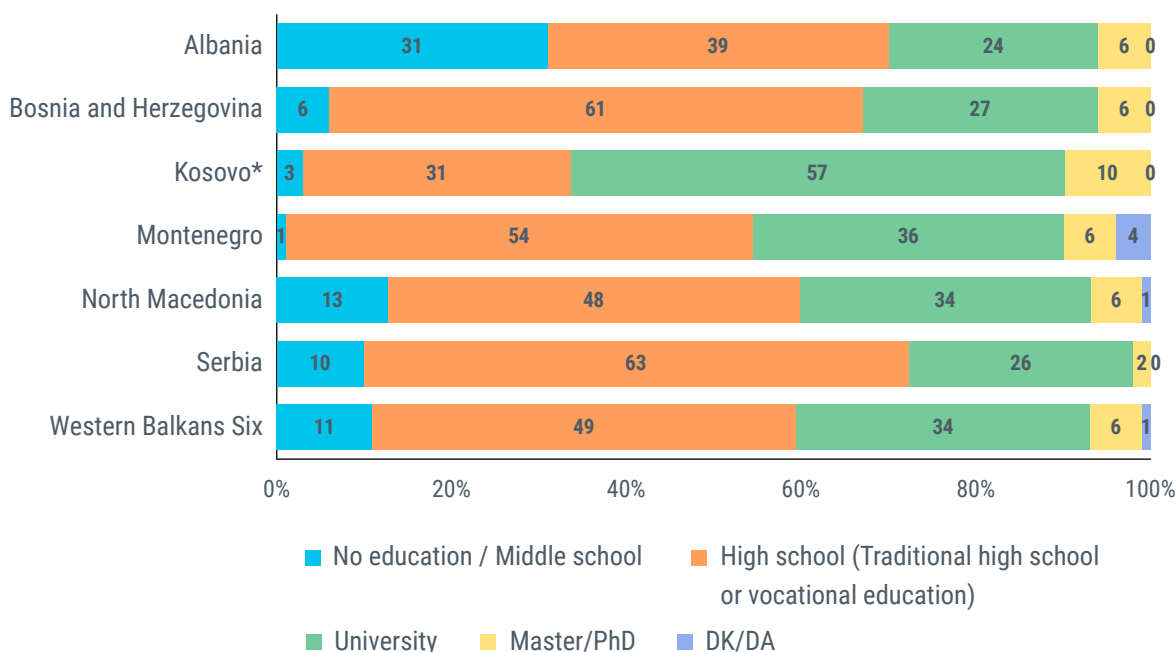
Sample Structure by Age





The graph above indicates that on a regional average 32% of total respondents fall between the ages of 18 and 34 years old, and 37% of total respondents fall between the ages of 35 and 54, whereas the age group of 55 to 65+ account for the remainder 31%. Kosovo* has the least number of respondents between the ages of 55 and 65+, accounting for a total of 17%, whereas North Macedonia has an almost equal distribution between the age group of 35 to 54 years old and ages of 55 to 65+, at 36% and 37%, respectively. Looking at the other side of the age spectrum, Kosovo* leads the way with the largest number of respondents ranging between the ages of 18 and 34 years old, at 47%, almost half of the total number of respondents.

FIGURE 117 Sample Structure by Education

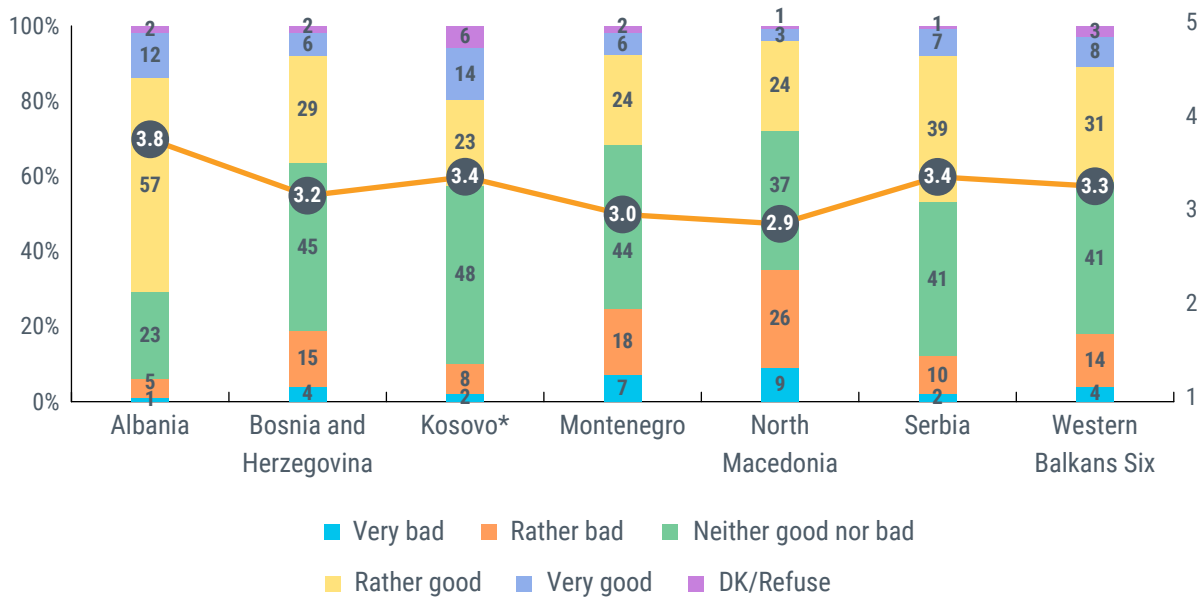


The graph above shows that on average majority of respondents hold an educational degree, with 49% of them having a high school diploma, and 34% of the respondents having a university degree. It is interesting to note that Albania has the highest number of respondents without education, standing at 31% of Albania’s total respondents. Without Albania in the picture, the average percentage of responders without a degree would have stood at 6.6%, instead of the current 11%.



FIGURE 118

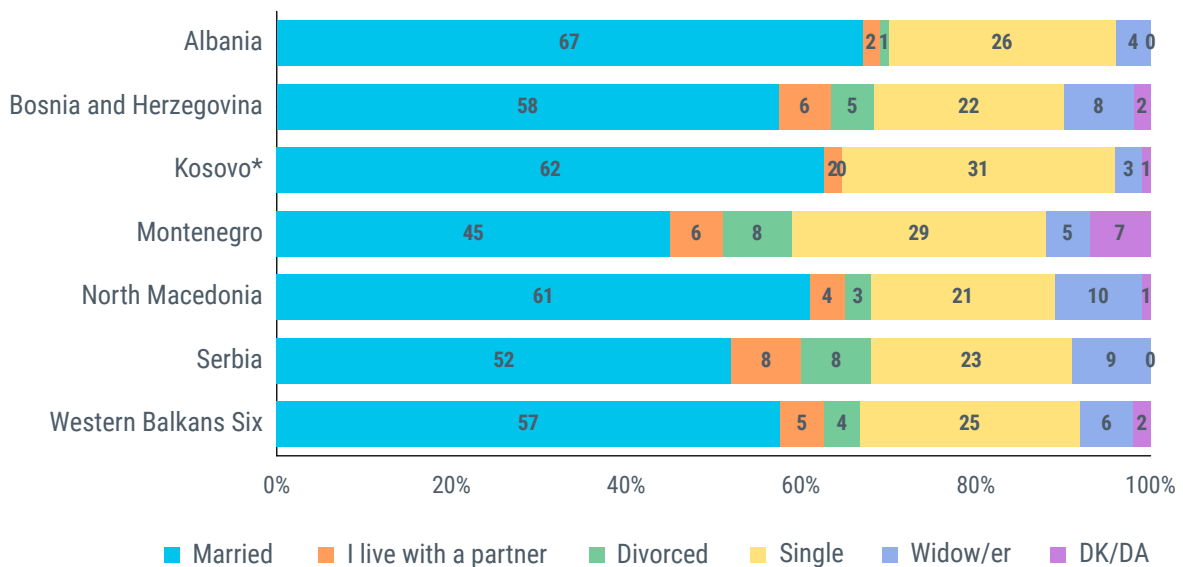
Perceived Availability of Education Opportunities in the Economy



It can be observed from the graph above that the perceived availability of education opportunities stands at 3.3 on average, which can be classified as “rather good”. Albania leads the way with 3.8%, only 0.2% away from the “very good” status. Kosovo* and Serbia follow, both having an equivalent average of 3.4% (rather good). North Macedonia is the economy with the least positive view with 2.9% perception rate (neither good nor bad).

FIGURE 119

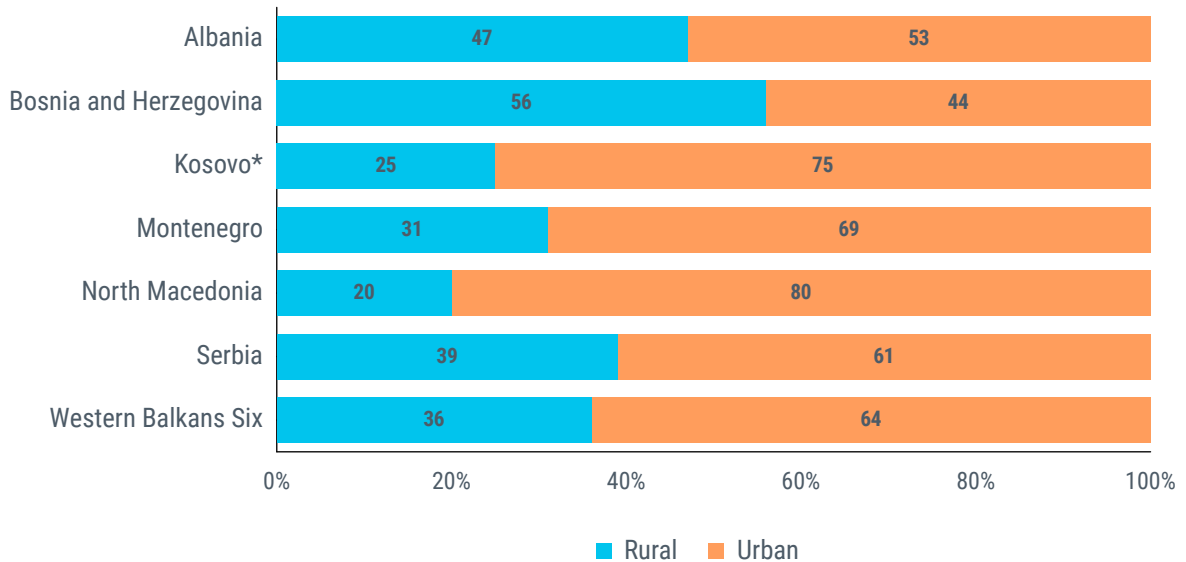
Sample Structure by Marital Status





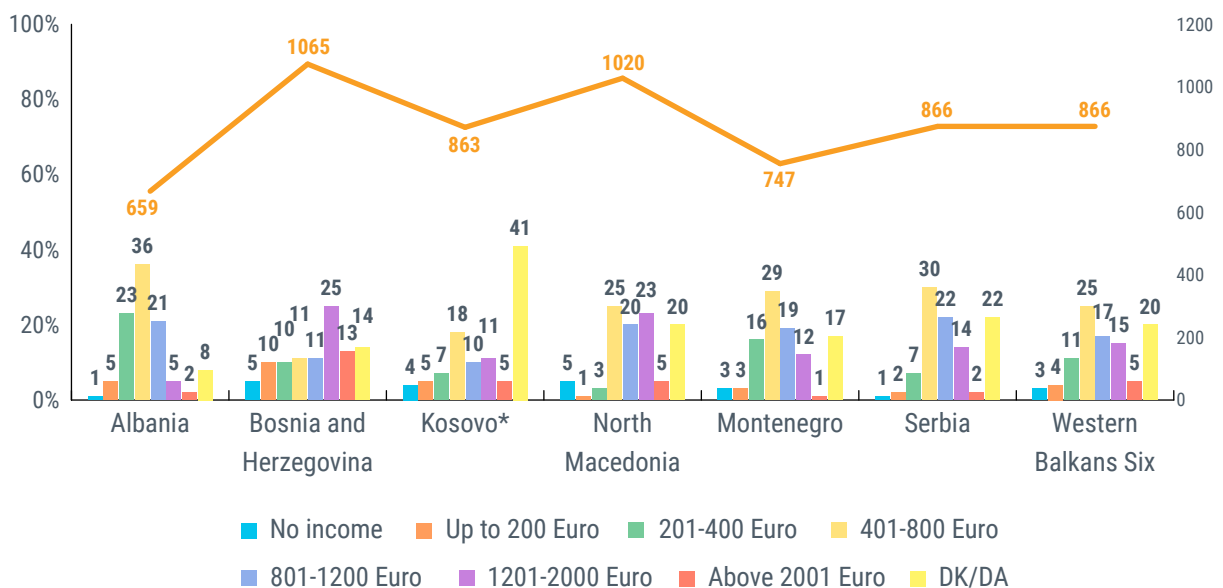
The graph above paints the picture of marital status of region’s respondents where majority of respondents are married, at 57% on average, followed by 25% of responders being single and 6% of widowed respondents while the ones living with a partner but not officially married account for 5% of total respondents.

FIGURE 120 Sample Structure by Urbanisation



From the urbanisation perspective, on average, majority of respondents fall in the urban category with 64% of region’s respondents living in urban areas and 36% of them living in rural areas as shown in the graph above. Bosnia and Herzegovina is the economy with an inverted proportion, with 56% of its respondents living in rural and 44% in urban areas.

FIGURE 121 Sample Structure by Monthly Income in the Household





On average, a significant number of those surveyed did not answer the monthly income question, 20% of total respondents. At the top is the category that earns a monthly income between 401 and 800 euros, accounting for 25% of total respondents. Bosnia and Herzegovina has the highest aggregate higher income rates starting from 2001 euros / month and above, at 38% of total respondents. On that metric, Albania has the least number of higher income earners, 7% of total respondents. On average, 7% of total respondents have an aggregate of no income to 200 euros income/month.

FIGURE 122

Sample Structure by Employment Status

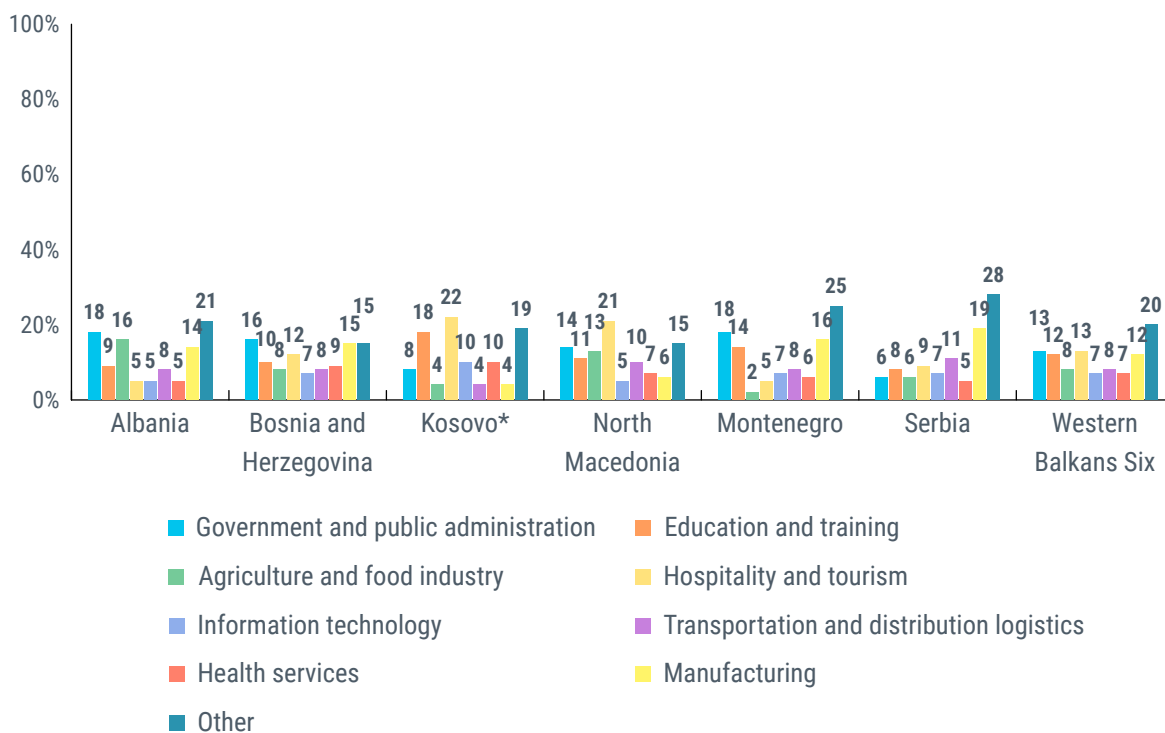


It can be observed from the employment status graph that the majority of respondents are employed, with an average of 52% of them being in employment, followed by 17% of housewife/houseman status, and 11% of total respondents being unemployed. When it comes to the employment status, Kosovo* leads the way with the largest proportion per economy, 65% of total respondents being employed at the time of the survey. On the same spectrum, Albania is the economy with the lowest proportion of employment per economy, standing at 39% of its total respondents.



FIGURE 123

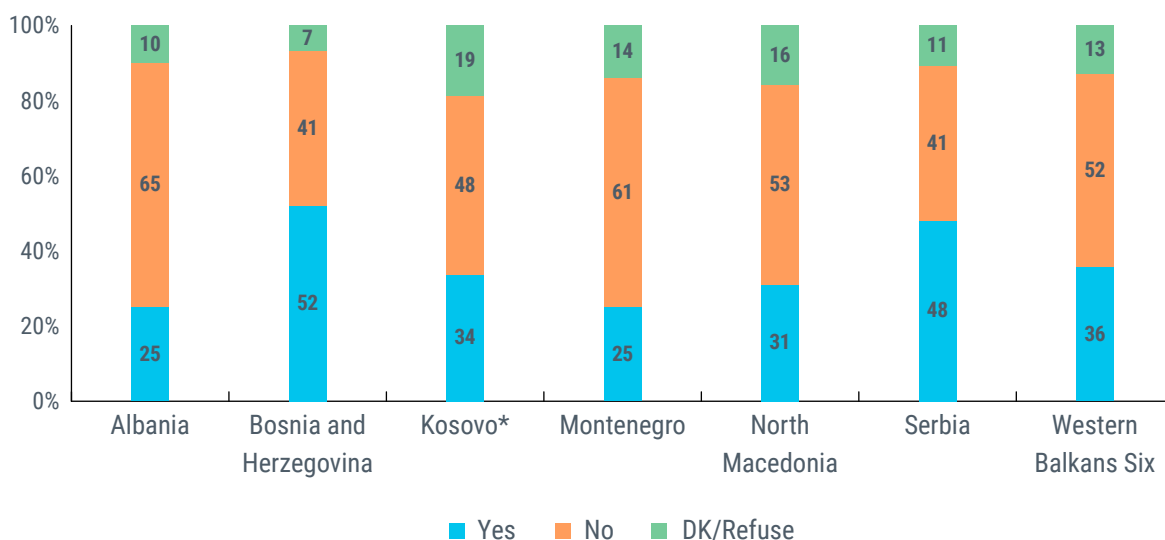
Sample Structure by Employment Sector



The sample structure by employment sector shows that, on average, the highest proportion of respondents falls into the “other” category, 20%, followed by government and public administration, and tourism sector each accounting for 13% of respondents on average. The public and tourism sectors and “other” category on average make up 46%, almost half of total respondents in the entire region.

FIGURE 124

Belief in the Existence of a Gender Pay Gap in the Economy

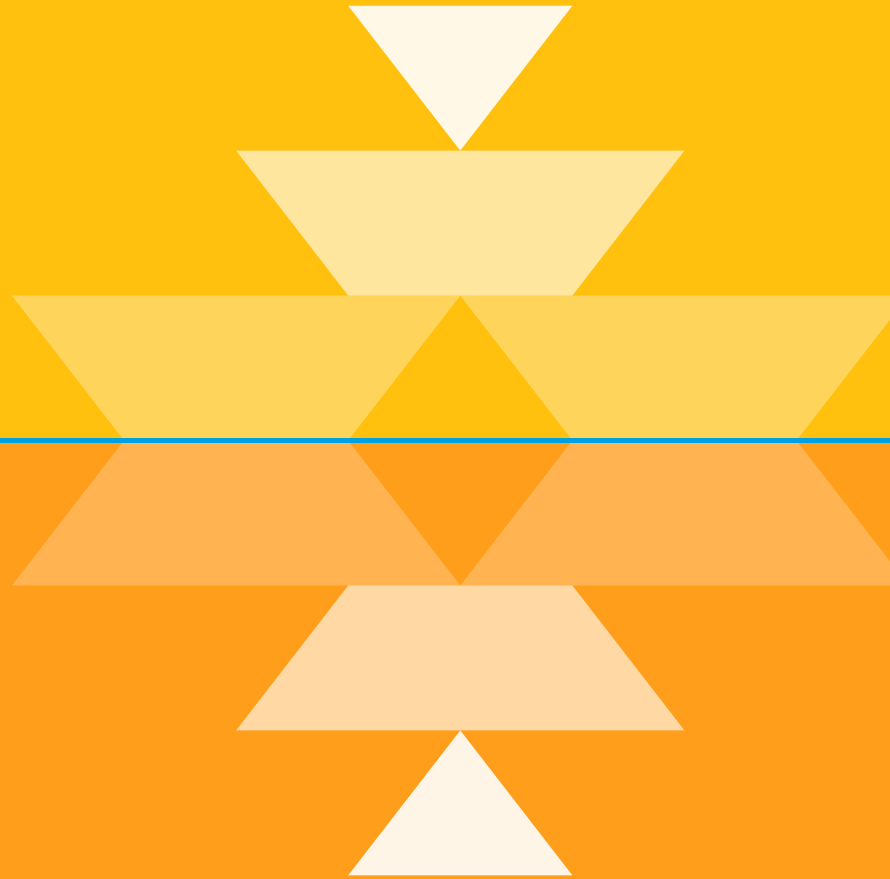




It can be seen in the graph above that, on average, 52% of respondents do not believe that there is a gender pay gap, whereas 36% of them do believe such a statement to be true. The economies with an inverse proportion to the region's average are Serbia and Bosnia and Herzegovina, with Serbia having 48% of respondents believing in the existence of a gender pay gap, and 41% not believing, and Bosnia and Herzegovina having 52% and 41% of respondents believing and not believing in the existence of a gender pay gap, respectively. It is interesting to note a significant presence of respondents who refuse to answer this question with a regional average of 13%, and with Kosovo* leading the way with 19% of respondents refusing to answer this question.

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