

## **Final Opinion Poll Report**

### **CITIZEN SATISFACTION SURVEY**



## Table of Contents

|  |    |
|--|----|
| Executive summary .....  | 3  |
| 1. Methodological notes .....  | 5  |
| 2. Description of the sample.....  | 7  |
| 3. About the survey .....  | 8  |
| 3. 1 Facts .....   | 8  |
| 3.2 Specific features and context of the survey .....  | 11 |
| 3.3 About the implementers: European PROGRES Programme and CeSID .....                                   | 15 |
| 4. Key research findings.....  | 16 |
| 5. General perceptions of local authorities and their institutions.....                                  | 20 |
| 6. Contacts of members of the public with municipal services and satisfaction with their operation ..... | 27 |
| 7. Perception of the extent of corruption at local authorities .....                                     | 38 |
| 8. Directions and priorities of municipal development.....   | 42 |
| 9. Local authorities and economic development .....  | 47 |
| 10. Satisfaction with areas of daily life .....  | 49 |
| 11. Perceptions of safety.....   | 51 |
| 12. Perceptions of living standards .....  | 53 |

## Executive summary

*This Citizen Satisfaction Survey* was carried out by CeSID, with support from the European PROGRES Programme. This is the third research cycle of this study (the first took place in 2010, and the second in 2013), and was carried out initially in 25, and subsequently in 34 municipalities/cities in Southern, South-Eastern and South-Western Serbia.

The survey involved a representative sample of 8,256 members of the public. The sample was constructed so as to be representative for each individual local authority, whilst each local authority was weighted by population for purposes of the final, aggregate report for the entire region surveyed.

The primary purpose of this survey was to acquaint the municipalities and their institutions, but also all other stakeholders (international and civil society organisations, members of the public) with the findings that show how satisfied citizens are with the performance of local authorities and the overall conditions in their respective local communities.

As this *Citizen Satisfaction Survey* has now been performed thrice, its results provide a valuable basis for monitoring trends, both in terms of the relationship between local residents and their local authorities and communities in general, and in terms of the performance of cities and municipalities in making interventions promoted by development programmes. Moreover, the results of the survey constitute a solid foundation for further development of local authorities and improvement of their performance.

Encouragingly, there has been a constant upward trend in the number of respondents who feel the local authorities take their interests into account and provide services appropriate to their needs. Another positive finding is the growth in optimism about the political situation. In 2010, the respondents were the most critical when rating political stability, and have grown less so ever since. The 2013 survey recorded higher average scores, and this year's findings are the highest to date.

The better rating of the local political situation can certainly be attributed to the somewhat better perceptions of the performance of municipal authorities. There have also been positive developments in terms of respondents' confidence in local institutions, a major indicator not only of institutional performance, but also of legitimacy, the key underpinning of any government or public institution.

The 2017 findings reveal a decline in the number of residents directly involved in any form of civic participation in local government.

Judging by the findings, respondents can now accomplish their business with local governments more quickly. One of the most favourable findings of this year's citizen satisfaction survey pertains to how notices and signage are arranged in local governments.

Although the number of respondents claiming to have had cause to complain against a civil servant has gone down over the past four years, this figure of nearly one-fifth is still relatively high. By contrast, very few number actually did lodge complaints, a finding identical to that seen four years ago.

A slight decline in perceived corruption at the local level has occurred over the past four (or seven) years. This conclusion is borne out by the constant increase in the number of responses indicating few civil servants are corrupt or that none are so.

Agriculture is still perceived as the industry that should drive future economic development. Ranked second, with a slight decline in share, is light industry, whilst all other sectors have remained nearly unchanged relative to previous surveys.

A key question in citizen satisfaction surveys concerns actual satisfaction with various aspects of the local environment. Four years ago, as many as 60% of those polled claimed to be dissatisfied with the quality of life in their cities and municipalities, whilst as few as 15% were satisfied. Although disaffection still outweighs satisfaction, the gap has narrowed, with 44% of all respondents reporting dissatisfaction, and 23% claiming to be satisfied.

Perceptions of security in areas where respondents live have declined. There has been a constant increase in the number of respondents who feel unsafe due to issues with local infrastructure (such as poorly lit streets, unsafe thoroughfares, and the like)

Perceived living standards have been growing slightly since the first survey, performed in 2010; this change is visible at both extremes of the scale. We have thus recorded an increase in the number of respondents claiming to 'live well', as well as in the number of those whose perceived living standards are 'average'.

This report is structured so as to present key findings for all three research cycles (2010, 2013, and 2017) at the levels of the respective aggregate samples, whilst all individual surveys (for each municipality or city) are available as separate documents.

## 1. Methodological notes

|                                       |  |
|---------------------------------------|--|
| Survey carried out by                 | CeSID Opinion Polling Agency, implementing partner of the European PROGRES Programme   |
| Fieldwork                             | Between 21 October and 6 November 2017   |
| Sample type and size                  | Random, representative sample of 8,256 adult residents of 34 municipalities/cities   |
| Sample frame                          | Polling station catchment areas as the most reliable registration units  |
| Selection of households               | Random sampling without replacement – each second street address from starting point for each polling station catchment area |
| Selection of respondents by household | Random sampling without replacement – respondents selected by date of first birthday in relation to survey date              |
| Survey method                         | Face-to-face at home   |
| Survey instrument                     | 95-item questionnaire  |

This public opinion survey was carried out by CeSID, implementing partner of the European PROGRES Programme between 21 October and 6 November 2017 in the entire region covered by the programme, consisting of 34 municipalities and cities.

The survey involved a representative sample of 8,256 members of the public. The sample was constructed so as to be representative for each individual local authority, whilst each local authority was weighted by population for purposes of the final, aggregate report for the entire region surveyed.

The survey instrument used was a 95-item questionnaire developed in collaboration with the Programme.

The interviews were conducted face-to-face, in direct contact with respondents. During enumerator training, instructors insisted on adherence to two important rules that, in addition to the sample, together have a major impact on the representativeness of the survey: the order of steps in the field, and the 'first birthday rule'.

Adherence to the sequence of steps ensures that an enumerator can comprehensively cover each survey point, whilst the 'first birthday rule' prevents responses only from members of the public who first answer the door when an enumerator visits. Enumerators were required to interview the member of each household aged 18 or above whose birthday came soonest after the date of the enumerator's visit.

This also ensured the representativeness of respondents by gender, education, and age.

Apart from quantitative public opinion survey, three to four in-depth interviews with representatives of civil society organisation per municipality had been conducted. Findings from this interviews are available in separate reports for each municipality.

## 2. Description of the sample

The following categories of respondents were covered based on the methodology established for the study:

*Structure of respondents by gender:* 44% women, 56% men.

*Respondent age:* 18 to 29, 16%; 30 to 39, 17%; 40 to 49, 20%; 50 to 59, 19%; 60 to 69, 17%; 70 and above, 12%.

*Structure of respondents by education:* primary school or lower, 20%; two- or three-year secondary school, 20%; four-year secondary school, 39%; college/university, 18%; school/university student, 3%.

*Respondent occupation:* housewife, 15%; farmer, 10%; unskilled or semi-skilled worker, 17%; skilled or highly-skilled worker, 19%; technician, 16%; municipal civil servant, 2%; civil servant (excluding with local authority), 5%; school/university student, 6%; professional, 8%; employer, 2%.

*Current employment status:* employed with an employer, 28%; business owner, 2%; self-employed, 7%; unemployed, 39%; inactive (retired or unable to work), 24%.

*Monthly income per member of household:* up to RSD 10,000, 33%; RSD 10,000 to 20,000, 31%; 20,000 to 40,000, 18%; percent; over 40,000, 6%; would not say, 12%.

*Respondent ethnicity:* Serbian, 76%; Albanian, 5%; Bosniak, 14%; Roma, 3%; Bulgarian, 1%.

### 3. About the survey

#### 3.1 Facts

**This Citizen Satisfaction Survey** was carried out by **CeSID**, with support from the **European PROGRES Programme**. This is the third research cycle of this study (the first took place in 2010, and the second in 2013), and was carried out initially in 25,<sup>1</sup> and subsequently in **34 municipalities/cities in Southern, South-Eastern and South-Western Serbia**. Local authorities covered by the survey are part of ten different administrative districts of Serbia.

The survey covered the following municipalities and cities:

1. Leskovac, Bojnik, Crna Trava, Lebane, Vlasotince, and Medveđa (Jablanica District);
2. Priboj, Prijepolje, Nova Varoš, and Sjenica (Zlatibor District);
3. Ivanjica (Moravica District);
4. Novi Pazar, Tutin, and Raška (Raška District);
5. Vranje, Surdulica, Bosilegrad, Bujanovac, Preševo, Vladičin Han, and Trgovište (Pčinja District);
6. Kuršumlija, Blace, Prokuplje, and Žitorađa (Toplica District);
7. Gadžin Han, Aleksinac, Doljevac, Svrljig, and Merošina (Nišava District);
8. Brus (Rasina District);
9. Knjaževac (Zaječar District), and
10. Bela Palanka and Babušnica (Pirot District).

The primary purpose of this survey was **to acquaint the municipalities and their institutions**, but also **all other stakeholders** (international and civil society organisations, members of the public) **with the findings that show how satisfied citizens are with the performance of local authorities and the overall conditions in their respective local communities**.

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<sup>1</sup> Unlike the first survey, performed in 2010 in the 25 municipalities and cities covered at the time by the EU PROGRES Programme, the 2013 and 2017 surveys comprised nine additional local authorities: Bela Palanka, Babušnica, Knjaževac, Brus, Gadžin Han, Aleksinac, Doljevac, Svrljig, and Merošina. Comparisons were made between the research cycles wherever possible, and are indicated as such in both this report and individual reports for each local authority.

As this **Citizen Satisfaction Survey** has now been performed thrice, its results provide a valuable basis for **monitoring trends**, both in terms of the relationship between local residents and their local authorities and communities in general, and in terms of the performance of cities and municipalities in making interventions promoted by development programmes. Moreover, the results of the survey constitute a **solid foundation for further development of local authorities and improvement of their performance**. These changes are important for at least two reasons. Firstly, they will create preconditions for residents to be provided better services when accomplishing their everyday tasks in contact and communication with local bodies. The second reason is of strategic importance for European integrations, as up to 70 percent of all rules in the European Union (EU) accession process are adopted and apply at the local level. As such, any changes made by local governments have a direct bearing on Serbia's integration into the EU.

**The aim of this survey was to learn to what extent the residents of these 34 municipalities/cities were satisfied with the services and activities provided by their local authorities**, including, but not limited, to: co-operation with members of the public and their organisations in solving problems; trust in local institutions; integrity of local civil servants and office-holders; satisfaction with a broad range of day-to-day issues that cities and municipalities can influence; perceptions of corruption and local safety; and the role of the local authority in promoting local economic development. The survey's findings indirectly reveal the **state of good governance** across all aspects of this important concept: accountability, transparency, participation, efficiency, and non-discrimination, the equal treatment of all citizens by local institutions.

Most questions from the previous survey were retained in this round to ensure that the findings are comparable with those recorded both seven and four years ago. **The questionnaire was revised** in collaboration with the European PROGRES Programme **to ensure results are comparable but also to add new issues** of importance for the perception of the performance of local authorities **that have emerged due to the interval that has elapsed between the second and third rounds of the survey**.

As the survey was also carried out in the municipalities of Bujanovac, Preševo, and Medveđa, where ethnic Albanians account for a significant or majority share of the population, the questionnaires were translated into Albanian and administered by ethnic Albanian or Albanian-speaking enumerators.

Regional and local co-ordinators were trained by the CeSID survey team and a comprehensive set of instructions/manual was prepared for all of them; this document

contained detailed information about the survey, sample, research steps, and rules that had to be adhered to in the course of the survey.

**CeSID specially developed representative samples for each of the 34 municipalities/cities covered by the survey.** The number of residents included in each sample varied by municipality or city size and **ranged (on average) from 200 to 400 respondents. The total sample numbered 8,256 individuals.** All respondents were adults and residents of one of the 34 municipalities or cities.

A total of seven regional co-ordinators and more than 100 field staff were responsible for carrying out the survey.

This report is structured so as to present key findings for all three research cycles (2010, 2013, and 2017) at the levels of the respective aggregate samples, whilst all individual surveys (for each municipality or city) are available as separate documents.

### 3.2 Specific features and context of the survey

The **Citizen Satisfaction Survey** is specific in many aspects; to ensure that the findings presented here can be better understood, we will list several issues that should be borne in mind when interpreting the results presented in this report.

#### *1. Demographics of the region surveyed*

The territory of the survey has a total of 949,945 inhabitants, accounting for 13.45% of the total population of Serbia.<sup>2</sup> Nevertheless, the local authorities involved are characterised by major differences in terms of all fundamental demographic characteristics. In terms of **population**, the region contains both Serbia's least-populous municipality (Crna Trava, with a population of 1,339), and cities with in excess of 100,000 inhabitants (Novi Pazar, with 104,674, and Leskovac, with 138,132). Population size is the demographic feature that determines all other indicators of economic, social, and political development of any community: as such, this fact must be borne in mind when interpreting both individual reports and this aggregate report.

The cities and municipalities surveyed have vastly different **population growth rates**, and these largely determine the needs of each local community. The region is home to municipalities with both the highest and the lowest population growth in Serbia. Most of the municipalities (30) are experiencing depopulation, with an exceptionally low -39.3 per mille in Crna Trava, -27.5 in Gadžin Han, and -20.3 in Babušnica. At the same time, four municipalities covered by the survey have positive birth rates (Novi Pazar, Sjenica, Tutin, and Preševo), including the one with the highest birth rate in all of Serbia: Tutin, with +7.9 per mile.

The **average population age** in the region covered by the survey is 43. However, there are, again, major differences between local governments: for instance, whilst the average age in Crna Trava is 55, just some tens of kilometres away, in Preševo, the average resident is 22 years younger, at 33. These data are reflected in differences in age cohorts (for instance, there are greater numbers of children under 15, and young people aged between 15 and 30 in some municipalities); this also has a substantial bearing on the local governments' priorities and needs.

A number of local authorities surveyed are **multi-ethnic**, so the sample contains not only Serbs, the majority ethnic group, but also (substantial proportions of) Bosniaks/Muslims, Albanians, Roma, and Bulgarians (in Preševo and Bujanovac, ethnic Albanians are in the majority; in Novi Pazar and Tutin it is Bosniaks/Muslims; whilst

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<sup>2</sup> Statistical Office of the Republic of Serbia: Vital Statistics, 2016 population estimates, available at [devinfo.stat.gov.rs/Opstine/libraries.aspx/Home.aspx](http://devinfo.stat.gov.rs/Opstine/libraries.aspx/Home.aspx).

ethnic Bulgarians are in the majority in Bosilegrad). These data may indicate specific issues and needs of these cities and municipalities that cannot be ignored.

All of the above information has an exceptionally important influence on both the economic performance and the needs and challenges faced by each individual local authority included in the survey.

## ***2. Socio-economic characteristics of the region surveyed***

Unlike demographics, the socio-economic characteristics of the local governments surveyed are less varied and more similar.

According to the latest Government Order establishing a uniform schedule of development of regions and local authorities for 2014 (*Official Gazette of the Republic of Serbia*, No. 104/2014), which categorises municipalities and cities into five groups with reference to the national GDP per capita average, most of the local governments surveyed – as many as 17 – belong to the ‘severely underdeveloped’ category (Group 5). Let us take a closer look at the categories:

1. No municipality or city in the region surveyed are at or above the national GDP per capita average (Group 1);
2. Only the **City of Vranje** is at between 80% and 100% of the national average (Group 2);
3. A total of four local authorities, **Ivanjica, Novi Pazar, Leskovac, and Prokuplje** belong to Group 3 (between 60% and 80% of the national average; these are categorised as ‘underdeveloped’ municipalities);
4. Twelve municipalities surveyed are considered ‘exceptionally underdeveloped’, at under 60% of the national average. These are **Aleksinac, Blace, Brus, Vlasotince, Gadžin Han, Doljevac, Knjaževac, Nova Varoš, Priboj, Rekovac, Sjenica, and Crna Trava**;
5. As many as 17 municipalities in the region are deemed ‘severely underdeveloped’ (at under 50% of the national average). These are **Babušnica, Bela Palanka, Bojnik, Bosilegrad, Bujanovac, Vladičin Han, Žitorađa, Kuršumlija, Lebane, Medveđa, Merošina, Preševo, Prijepolje, Svrlijig, Surdulica, Trgovište, and Tutin**.

**Registered unemployment**<sup>3</sup> in the region surveyed stands at 16.9%: in other words, 169 of every 1,000 inhabitants are jobless. There are, however, significant differences between municipalities in terms of this indicator as well: the unemployment rate in Vranje, for instance, is 10%, whilst in Tutin it stands at above 25%.

The percentage at the national level is 9.6%, meaning that all municipalities and cities in this region are ranked lower than the Serbian average for this indicator.

The **average wage, less taxes and contributions**, in the region surveyed amounts to RSD 30,742, some 33% less than the national average (of RSD 46,097)<sup>4</sup>. The greatest differences for this indicator are present between Medveđa (at RSD 43,864) and Trgovište (as little as RSD 27,657). Incidentally, of all 34 local authorities surveyed, only Medveđa stands above the national average, with the remaining 33 below this line.

The **average poverty rate** in the region is 47%, significantly above the national average of 25.7%.<sup>5</sup> In other words, all of the region's municipalities and cities have estimated poverty rates higher than the average. Just how dire the situation is will be seen from the fact that the best-ranked communities, Vranje and Knjaževac, have poverty rates of 'just' 31 and 33 percent, respectively. And that is not all: the region is home to municipalities with Serbia's highest poverty rates, with Tutin, Bojnik, and Preševo, for instance, recording rates of in excess of 60%.

The region surveyed bears all the hallmarks of underdevelopment according to all socio-economic parameters. It has low standards of living, relatively high unemployment, and pervasive poverty; any differences between cities and municipalities are not significant in this regard. Put another way, all of these communities share a similar context that is important for interpreting the findings of this research, in particular its aspects that concern the economic situation and living standards.

### ***3. Political context of the third Citizen Satisfaction Survey***

**In all municipalities surveyed, the interval between the second and third research cycles saw local elections**, or elections for local legislatures: scheduled local elections were held in 33 local governments on 24 April 2016, whilst a snap local poll took place in Medveđa somewhat earlier, on 13 September 2015. These elections brought about some changes to the structure of the local authorities; it should also be noted that

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<sup>3</sup> National Employment Service and Statistical Office of the Republic of Serbia: Vital Statistics, 2016 estimates, available at [devinfo.stat.gov.rs/Opstine/libraries.aspx/Home.aspx](http://devinfo.stat.gov.rs/Opstine/libraries.aspx/Home.aspx).

<sup>4</sup> Statistical Office of the Republic of Serbia: Wage and Employment Statistics, 2016 data, available at [devinfo.stat.gov.rs/Opstine/libraries.aspx/Home.aspx](http://devinfo.stat.gov.rs/Opstine/libraries.aspx/Home.aspx)

<sup>5</sup> For detailed information and methodology used in calculating this indicator, see *Poverty Map of Serbia: Method and Key Findings*, Statistical Office of the Republic of Serbia and World Bank, 2016, available at [socijalnoukljucivanje.gov.rs/category/dokumenta?search-type=dokumenta&s=mapa](http://socijalnoukljucivanje.gov.rs/category/dokumenta?search-type=dokumenta&s=mapa).

the 2016 poll occurred together with a parliamentary and presidential election. These changes in government have affected public perceptions of a number of issues, especially ratings of the political situation or confidence in the head of the local government/Mayor and municipal/city institutions. This fact also ought to be taken into account when interpreting the findings.

#### ***4. Challenges and peculiarities***

**The municipalities and cities covered by the survey are (primarily) part of a region with pronounced *traditional political culture*** (including features of *patriarchal culture*), which, among other things, holds that the man is the key figure in the household. This, for instance, entails so-called ‘family voting’ in elections, where all members of the household bow down to the views of the ‘master’ or ‘head’ of the household. Therefore, the fact that **men outnumber the women in our survey (by 56 to 44 percent in the total sample)** should not come as a surprise, as most opinion pollsters face the same problem in this region. Nevertheless, this does not dramatically affect the distribution or quality of responses, as the views expressed are ‘shared’, as indicated above, and the perceptions would in all likelihood not differ dramatically even had more women been included in the sample.

**The fact that the survey was carried out using the face-to-face method in 34 municipalities/cities, across ten districts, on a sample of more than 8,000 respondents, shows just how demanding it was.** It should be added that, in smaller municipalities, up to 70 percent of the sample was made up of rural areas and remote mountain villages; even in larger municipalities or cities, rural areas accounted for up to 40 percent of the total sample. This was a particular challenge for the research team, and one that was successfully overcome on this occasion.

This year’s survey was carried out after a four-year interval since the last round of research, and seven years from the first survey, which took place in 2010. Revising the survey instrument (questionnaire) posed a particular challenge: the findings needed to remain comparable with those of both 2010 and 2013, whilst new questions had to be added to reflect the changes that occurred between the two (or three) cycles of research.

### 3.3 About the implementers: European PROGRES Programme and CeSID

**European PROGRES<sup>6</sup>** is the largest area-based development programme in Serbia, and aims at supporting sustainable development of 34 local authorities in the South, South-East, and South-West of the country. The programme is funded by two donors, the EU and the Swiss Government, together by the Government of the Republic of Serbia.

Implemented by the United Nations Office for Project Services (UNOPS) and the Department for Contracting and Financing of EU Funded Programmes (CFCU) of the Government of Serbia's Ministry of Finance, the Programme provides financial, technical and advisory support to its beneficiaries.

European PROGRES is focused on the attainment of four key results: 1) Strengthening local governance; 2) Increasing competitiveness of the local economy; 3) Social inclusion; and 4) Communication and raising public awareness about the importance of European integration.

The Programme relies on good practices and results from its predecessor, the **EU PROGRES Programme<sup>7</sup>**.

**CeSID<sup>8</sup>** is one of Serbia's leading opinion polling agencies. It boasts a well-developed network of regional and local offices made up of 500 trained interviewers and field co-ordinators.

The company combines think-tank and fieldwork components. The former is made up of some of the most influential Serbian experts in a number of fields: sociologists, political scientists, lawyers, statisticians, software developers, and media experts. By drawing upon its network of staff and consultants, CeSID is able to carry out research in various areas: political and sociological research; institutional analysis; B2B surveys; market surveys; as well as energy, sustainable development, psychology, and media surveys. CeSID's field network is comprised of five regional offices, 12 local centres, and co-ordinator teams in all 165 Serbian municipalities/cities. The company has to date carried out research using a variety of techniques, including quantitative and qualitative research, institutional analysis, and content analysis, and has also monitored and evaluated a wide variety of projects and activities.

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<sup>6</sup>For more information about the European PROGRES Programme, please visit [europeanprogres.org](http://europeanprogres.org).

<sup>7</sup> For more information about the EU PROGRES Programme, please visit [euprogres.org](http://euprogres.org).

<sup>8</sup> For more information about CeSID, please visit [cesid.rs](http://cesid.rs).

#### 4. Key research findings

Citizen satisfaction greatly depends on timely and accurate information and awareness of the state of the local community; promoting this awareness requires constant efforts by local authorities, and is easily reversed. Since 2010, the **proportion of respondents who claim to be aware 'as much as they need to be' has remained nearly identical, ranging from 35 to 37 percent.** Similarly, those who feel they are 'well aware' have never numbered more than 9%.

Encouragingly, **there has been a constant upward trend in the number of respondents who feel the local authorities take their interests into account and provide services appropriate to their needs.** This percentage stood at 22% in 2010, 26% in 2013, and is currently as high as 37%.

Another positive finding is the **growth in optimism about the political situation.** In 2010, the respondents were the most critical when rating political stability, and have grown less so ever since. The 2013 survey recorded higher average scores, and this year's findings are the highest to date.

**The better rating of the local political situation can certainly be attributed to the somewhat better perceptions of the performance of municipal authorities.** Respondents have in 2017 awarded better scores to their local representatives and civil servants than was the case four years ago. These changes are not reflected in major differences of the numbers involved, but they are certainly part of an overall trend whereby local institutions are rated better: this development can be gleaned from answers to both this and other questions in the survey.

**There have also been positive developments in terms of respondents' confidence in local institutions,** a major indicator not only of institutional performance, but also of legitimacy, the key underpinning of any government or public institution. Only heads of local authorities/Mayors were able to command trust of more than 20% of those polled until 2013, but this figure is now attainable by all other institutions. Confidence levels range from 20% for municipal/city councils to 27% for heads of local governments/Mayors.

**The 2017 findings reveal a decline in the number of residents directly involved in any form of civic participation in local government.** Whilst in previous surveys the percentages had ranged from 8 to 13 percent, depending on type of civic engagement, they now stand at between 4 and 8 percent.

Judging by the findings, **respondents can now accomplish their business with local governments more quickly.** And, whilst in 2010 and 2013 the numbers of those polled

who felt they could complete their dealings with local authorities quickly stood at 27 and 22 percent, respectively, in this survey they number 35%.

**One of the most favourable findings of this year's citizen satisfaction survey pertains to how notices and signage are arranged in local governments.** And, whilst seven and four years ago at most 9% of all respondents believed the provision of information at municipal offices was well organised, this figure is now much higher, standing at a full 47%.

Of the many possible obstacles to exercising their rights, **residents assign the greatest importance to lack of information (with the numbers being the same in both surveys where this question was asked, at 34%),** followed by the complexity of procedures (again reported by the same proportion of respondents, of 27%). Lengthy procedures are ranked third (with about 20%), whilst respondents believe that the impoliteness and lack of professionalism on the part of civil servants, as well as uncertain deadlines for accomplishing their business with local governments, are the least problematic.

Although the number of respondents claiming to have had cause to complain against a civil servant has gone down over the past four years (from 25 to 21 percent), this figure of nearly one-fifth is still relatively high. By contrast, only 5% actually did lodge complaints, a finding identical to that seen four years ago.

**A slight decline in perceived corruption at the local level** has occurred over the past four (or seven) years. This conclusion is borne out by the constant increase in the number of responses indicating few civil servants are corrupt (these range from 11 to 18 percent) or that none are so (from 4 to 7 percent). The topic of corruption was broadened in this survey with the introduction of a question designed to measure what corruption usually entails: giving and taking bribes. Those who claim to have given money in return for a service number 2% across the region: this may be a low figure in statistical terms, but is in practice a significant percentage. Equally worrisome is the finding that as many as 4% of those polled have been asked for a bribe, either directly or indirectly, by a civil servant.

**Agriculture is still perceived as the industry that should drive future economic development (as reported by 44% of those polled).** Ranked second, with a slight decline in share, is light industry (at 21%), whilst all other sectors have remained nearly unchanged relative to previous surveys. The public perception that agriculture is the way forward for most local authorities surveyed is also borne out by the fact that **nearly one-third of those polled (31%) feel municipal resources should be utilised to assist farmers,** the same finding as recorded in previous surveys.

A topic investigated in all three research cycles was public perception of the place and role of the local authority in local economic development. There has been significant progress in this regard, **as the overall rating of the economic situation is now much better than four or seven years ago.** Changes are in evidence for all three levels we looked at: local, regional, and national.

Apart from scoring the current economic situation, the respondents were asked to state to what extent, in their opinion, their local authority was ready to support the development of private enterprise. **More respondents now believe that local authorities do 'as much as they can' across all four types of municipal support, with numbers increasing by between 11 and 14 percentage points.** Respondents are more aware of the limitations faced by cities and municipalities in terms of business incentives, and are seemingly more understanding of the fact that support is not as strong as everyone would like it to be.

A key question in citizen satisfaction surveys concerns actual satisfaction with various aspects of the local environment. Four years ago, as many as 60% of those polled claimed to be dissatisfied with the quality of life in their cities and municipalities, whilst as few as 15% were satisfied. Although disaffection still outweighs satisfaction, the gap has narrowed, with **44% of all respondents reporting dissatisfaction, and 23% claiming to be satisfied.** A look at the individual issues reveals that the situation has either changed slightly or has remained the same. Perceived quality has declined for a very small number of issues, and, even where it has, the differences are truly slight. Residents are still the least satisfied with the state of the utility infrastructure (water supply, sewerage, district heating), as reported by 52% of those polled, and transportation, as cited by 51%. By contrast, satisfaction is still the highest with civic solidarity and readiness of fellow residents to help when needed (at 56%), quality of the education system (53%), and safety and security (48%).

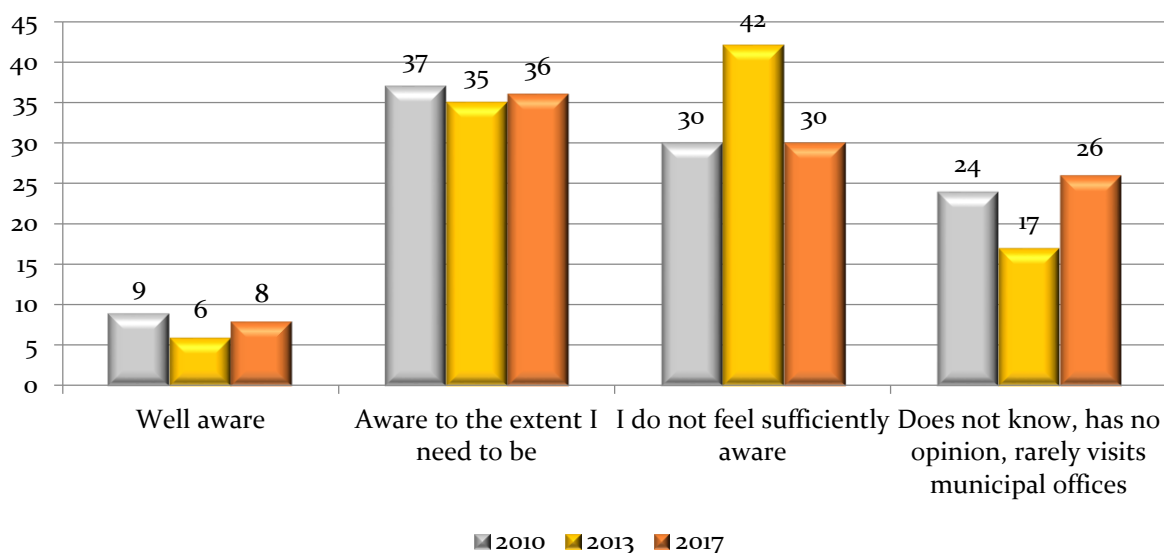
**Perceptions of security in areas where respondents live have declined.** Whilst seven years ago as many as 46% of those polled felt safe, this figure fell to 28% thereafter, and has now dropped even further, to 24%. On the other hand, the number of respondents who report feeling 'mostly' or 'completely' unsafe has been growing: from 15%, to 19%, to 23% in this survey. There has been a constant increase in the number of respondents who feel unsafe due to issues with local infrastructure (such as poorly lit streets, unsafe thoroughfares, and the like): this proportion has risen from 23% to 36% in this survey. By contrast, there has been a fall in feelings of insecurity due to crime or drug addiction. Finally, figures indicating concern over discord with fellow residents or inter-ethnic tensions, as well as fear of stray dogs, have remained almost unchanged.

**Perceived living standards have been growing slightly** since the first survey, performed in 2010; this change is visible at both extremes of the scale. We have thus recorded an increase in the number of respondents claiming to ‘live well’ (from 4 to 10 percent), as well as in the number of those whose perceived living standards are ‘average’ (from 22 to 25 percent). On the other hand, a decline is noticeable in the proportion of respondents who answered their living standards were ‘barely tolerable’ (from 33 to 28 percent) or ‘intolerable’ (17 to 6 percent). Apart from the reduction in the share of respondents whose perceived living standards are ‘intolerable’ or worse than before, **there has also been a decline in the number of residents who feel their municipality is a worse place to live than elsewhere in Serbia.**

## 5. General perceptions of local authorities and their institutions

Responses to the question of how aware residents are of what the local authority does reveal that efforts to raise public awareness are not a once-and-for-all process. In other words, **keeping residents informed requires constant and repeated efforts by all local governments, and is easily reversed.** The percentage of respondents claiming to be as aware as they need to be has remained nearly identical ever since 2010, and ranges from 35 to 37 percent. Similarly, those who feel they are ‘well aware’ have never numbered more than 9%; see Chart 1. Such efforts as are invested have borne fruit, as evidenced by changes in the number of respondents claiming not to be sufficiently aware. This figure has varied, and is currently at the same level as seen in 2010, or 30%.

*Chart 1. Do you feel you are sufficiently aware of what your municipality does?*

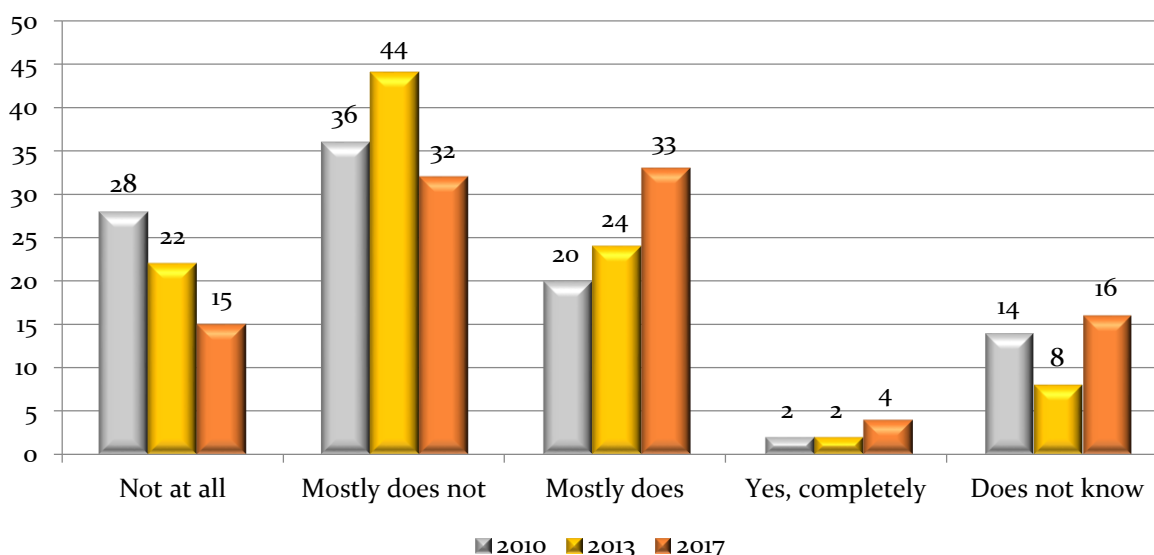


The greatest level of resident awareness was recorded in Sjenica (where 30% of all residents reported being ‘well aware’), followed by Blace (23%) and Surdulica (19%). By contrast, the greatest proportions of respondents who believed themselves to be ‘insufficiently aware’ was seen in Crna Trava (65%) and Vlasotince and Bojnik (57% each).

Encouragingly, **there has been a constant upward trend in the number of respondents who feel the local authorities take their interests into account and provide services appropriate to their needs.** This percentage stood at 22% in 2010, 26% in 2013, and is currently as high as 37% (this is the aggregate of the answers of ‘mostly’ and ‘completely’); see Chart 2. Although the number of respondents who hold the opposing view has remained high, it has nevertheless been on the decline since 2010 (from 64%, to 66%, to the current 47%). The conclusion we can draw here is that respondents have recognised some changes in how local governments behave that lead

them to feel the authorities are there to serve the residents, rather than vice versa. Nonetheless, this awareness and view ought to be reinforced, both with the authorities and with the general public.

*Chart 2. Does the local authority take the public's interests into consideration and provide services appropriate to the public's needs?*



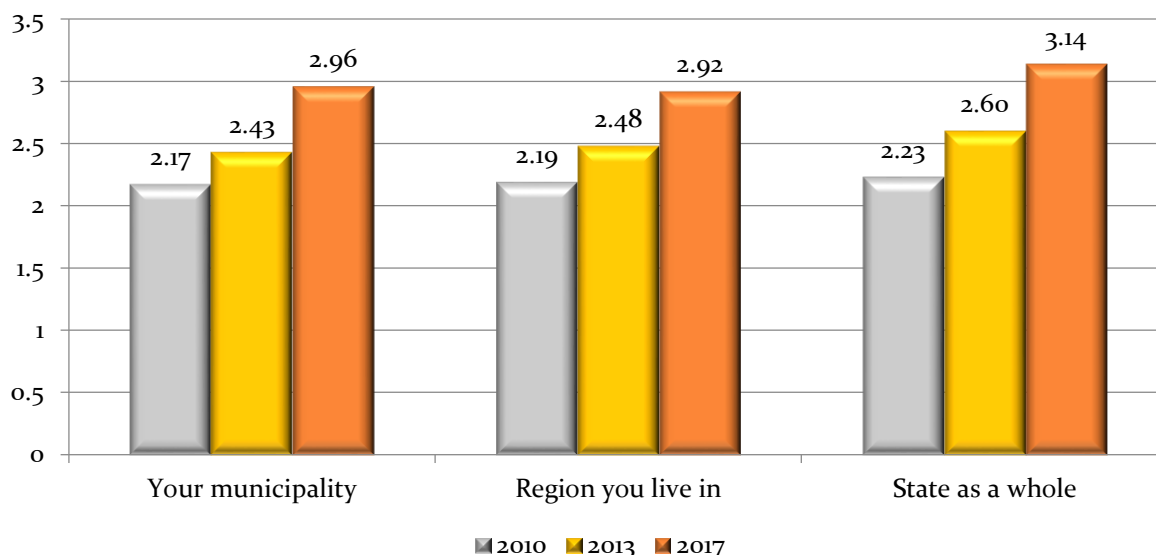
The best results with respect to this issue were seen in the City of Vranje (where as many as 20% of those polled said the local government met their needs fully), followed by Sjenica (18%), and Svrlijig (16%). On the other hand, the greatest dissatisfaction in this regard was exhibited in Vlasotince (56% of its residents claimed the local government did not meet their needs at all), Bojnik (54%), and Leskovac (38%).

Another positive finding is the **growth in optimism about the political situation**, notwithstanding the complex state of affairs, in particular in multi-ethnic communities of Southern and South-Western Serbia; see Chart 3. Perceptions were here captured by asking respondents to rate the political situation on a scale from 1 to 5 (with 1 being worst, and 5 best) at three levels, local, regional, and national. In 2010, the respondents were the harshest in their criticism of politics: across all three levels, the scores were closest to a 2. Optimism increased in the 2013 survey, and in this year's findings the score has almost reached a 3. Statistically speaking, there are no major differences in how the situation is perceived at the municipal and regional level, whilst the score for national politics is the best, exceeding a 3.

Apart from the trend whereby the political situation is perceived as getting better (which may mean it is seen as more stable or predictable, that politicians are closer to

the public, and so on), also perceptible is a trend for the local level to no longer be ranked the worst of all three tiers tested, as was the case seven and, to some extent, four years ago. All of these findings are, doubtlessly, positive, and indirectly reveal increasing satisfaction of citizens with the political situation in their local communities.

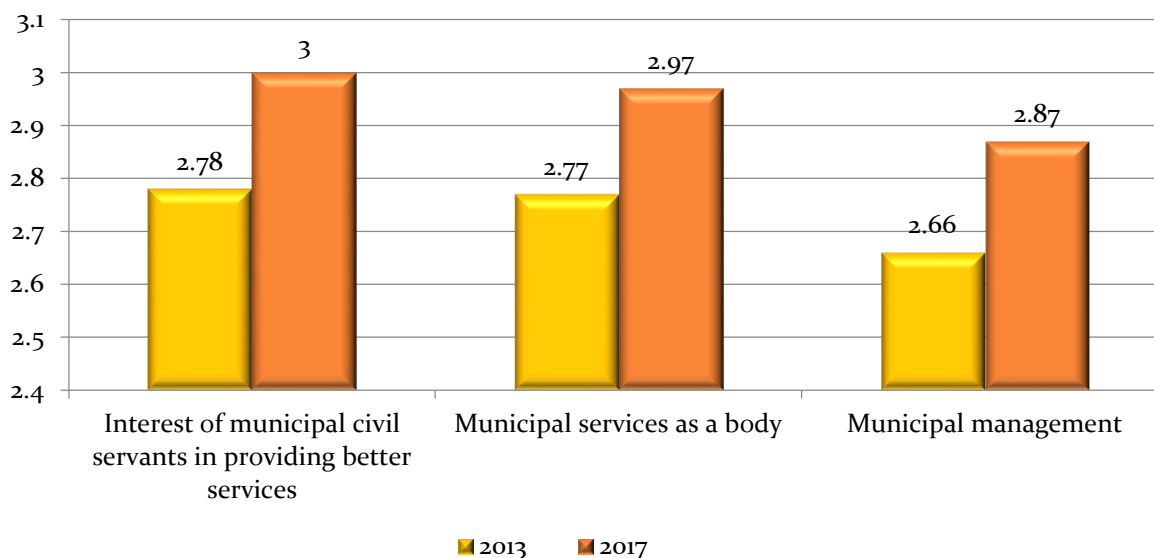
*Chart 3. Average rating of the political situation*



**The better rating of the local political situation can certainly be attributed to the somewhat better perceptions of the performance of municipal authorities; see Chart 4.**

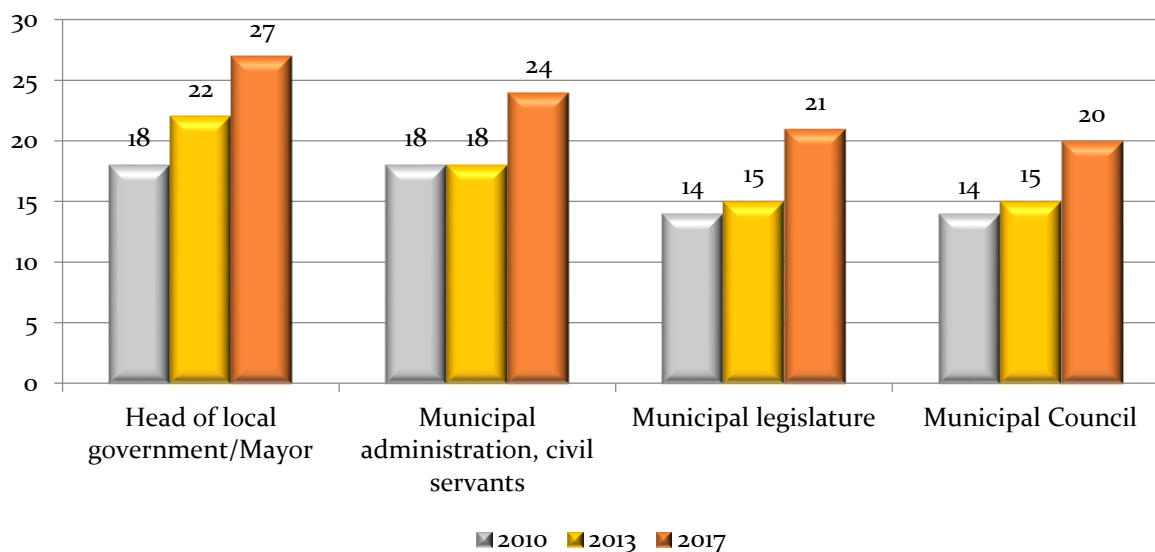
Respondents have in 2017 awarded better scores to their local representatives and civil servants than was the case four years ago. (By way of a reminder, this question was not included in the 2010 questionnaire.) These changes are not reflected in major differences of the numbers involved, but they are certainly part of an overall trend whereby local institutions are rated better: this development can be gleaned from answers to both this and other questions in the survey. Municipal services and administration have seen the greatest improvement and the best scores in this survey, a good indicator of just how far they have advanced to meet respondents' needs. Obviously, continuing efforts are required here to continue the upward trend or prevent a relapse.

*Chart 4. Average rating of the heads of the municipal administration*



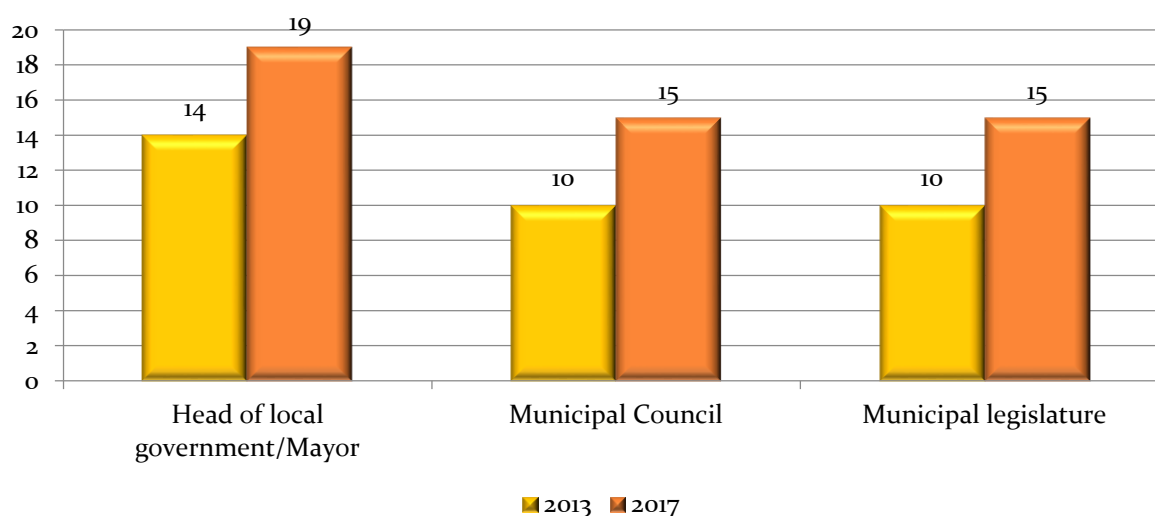
There have also been positive developments in terms of respondents' confidence in local institutions, a major indicator not only of institutional performance, but also of legitimacy, the key underpinning of any government or public institution; see Chart 5. Only heads of local authorities/Mayors were able to command trust of more than 20% of those polled until 2013 (with, for instance, 22% recorded in 2013), but this figure is now attainable by all other institutions. Confidence levels range from 20% for municipal/city councils to 27% for heads of local governments/Mayors. These are not drastic changes either, but neither could they be expected to be such: confidence in institutions has been eroded in Serbia in a long-standing trend, which is only now slowly being reversed. At any rate, it is very important to see a clear slow but steady trend of growing public confidence in local institutions, yet another indirect indicator of greater citizen satisfaction with life in their local communities.

*Chart 5. Trust in municipal institutions*



There are two reasons why respondents always single out the head of the local government/Mayor above all other local institutions: a) the first reason is conceptual in nature, and has to do with the fact that this office places the person occupying it into the forefront, and, particularly in smaller communities, ensures greater visibility and closer relationships with most residents; b) the second reason is practical, and concerns the public perception of the head of the local government/Mayor as someone who most meets the desires and needs of the residents; see Chart 6. A positive trend is in evidence with this question as well, with a slight increase in the number of respondents who feel that local institutions meet the needs of the public to a 'great' or 'very great' extent, from between 10 and 15 percent to between 15 and 19 percent.

*Chart 6. To what extent do local bodies meet the needs of the public?*



At the close of this segment of the survey, the respondents were asked a question to measure civic activism and local residents' options and habits in taking part in democratic processes such as referendums, public hearings, public consultations, and decision-making to introduce voluntary local taxes.

Direct civic participation in local governance, through decision-making or oversight of local government performance, is quite limited in the local authorities surveyed (as in other areas of Serbia). This finding reveals, on the one hand, an under-developed participatory political culture and low civic engagement, and, on the other, a lack of readiness, willingness, and capacity on the part of the local governments to organise these various forms of direct participation and to encourage members of the public to use and take part in them.

**The 2017 findings reveal a decline in the number of residents directly involved in any form of civic participation in local government.** Whilst in previous surveys the percentages had ranged from 8 to 13 percent, depending on type of civic engagement, they now stand at between 4 and 8 percent.<sup>9</sup>

These findings lead to two conclusions. The local residents seem to show a relatively low degree of participatory political culture and lack decision-making habits that could serve as useful means of oversight of local authorities. However, **residents will participate in direct democracy initiatives tested in the survey to the extent that the local authorities make such participation possible and allow it.** If the local authority does not call a referendum – and it alone can do so – no resident will be able to vote in it. By contrast, residents can initiate a referendum on an issue from the remit of the local authority (which would represent a particularly notable instance of direct democracy), but the statutory opportunities for doing so are very restrictive (organising the initiative, collecting and certifying signatures, number of signatures required in support of the initiative, etc.), and can be said to hinder rather than facilitate grass-roots initiatives. Given the poor national-level legislation governing the issue (which is generally just copied by local authorities in their byelaws) and the lack of political culture amongst residents and local political structures, it is no wonder that these four types of civic participation are rare. What can be done here? In view of the limited instruments available to residents, the local authorities should be responsible for using the facilities open to them to ensure that members of the public can voice their views and opinions when they have the need to do so. There are no obstacles, statutory or otherwise, that prevent, for instance, public debates and public hearings (that serve as

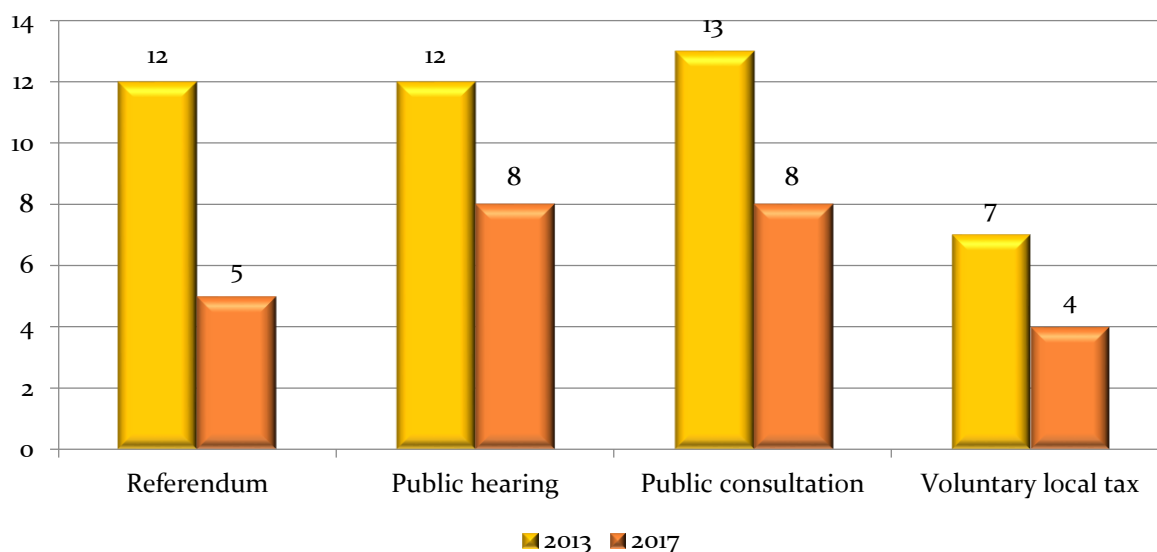
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<sup>9</sup> The question designed to test the participation of members of the public in these democratic processes was worded so as to allow multiple answers, whereby each resident could state all the forms of direct democracy they had taken part in. This means that a single resident could say that they had taken part in all four processes: referendum, public hearing, public debate, and voluntary local tax.

checks and balances for the local authorities) to be organised with respect to issues not mandated by law (such as, for instance, public debates about the budget), but also for other questions of interest for residents.

All of these general conclusions gain in importance in the light of new findings, which, as shown in Chart 7, reveal a decline in the number of residents taking part in these types of direct decision-making about issues from the direct remits of their local bodies.

*Chart 7. Active participation by the public in local decision-making*

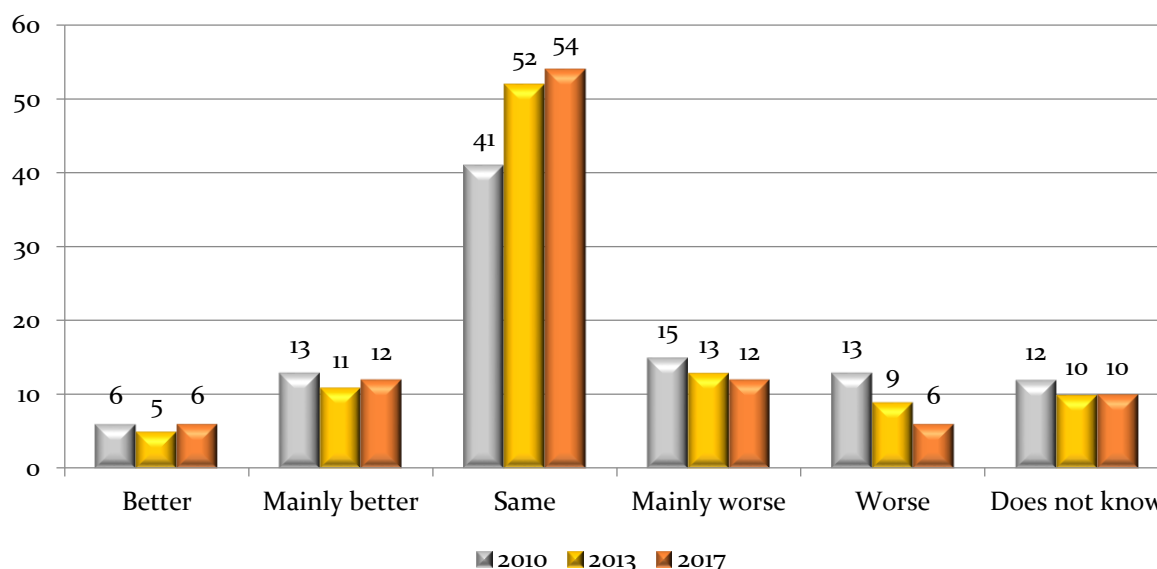


## 6. Contacts of members of the public with municipal services and satisfaction with their operation

Residents' views of their contacts with municipal services shows that the performance of these bodies has generally remained unchanged relative to seven or three years ago; see Chart 8. Most respondents (54%) still believe that municipal/city services are performing the same as they did three years ago. Further, nearly identical numbers of those polled now claim the state of affairs is now better (18% in aggregate). Yet, encouragingly, there has been a slight decline in the number of respondents claiming that performance has deteriorated relative to three years ago: in 2010, their proportion was 28%, in 2013, it was 21%, and now it stands at 18%.

It is not very likely to expect dissatisfied residents to become satisfied after only a short time: they will probably first report the view that there has been no change, and it will take time and effort on the part of the local government to increase the share of residents reporting improvement in this regard.

*Chart 8. Do municipal services operate better, the same as, or worse than three years ago?*



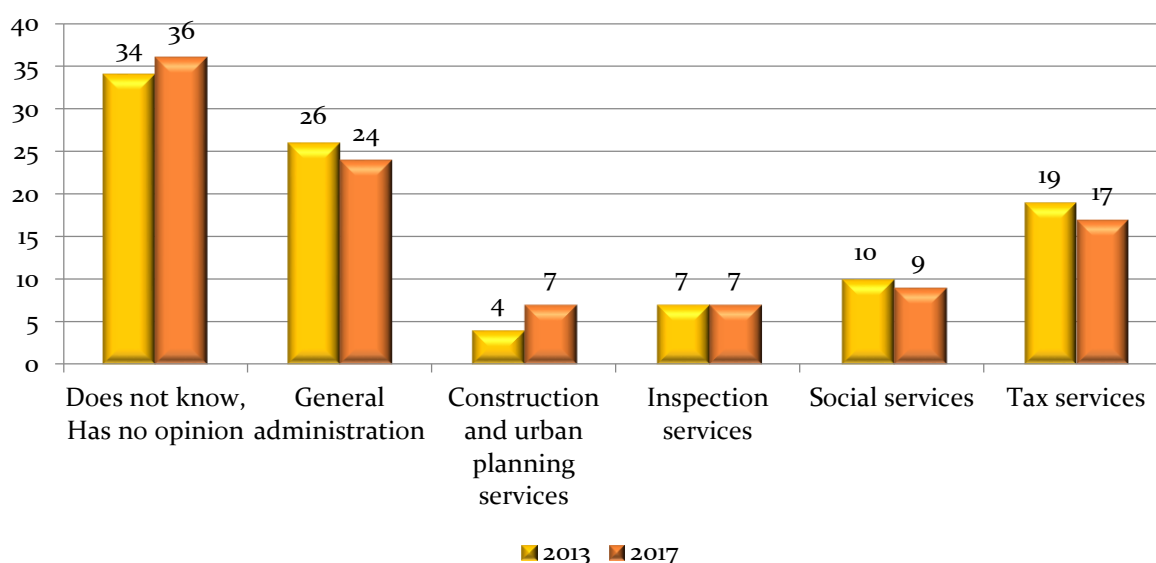
There are major differences between local governments in this regard. The inhabitants of Sjenica are the readiest to recognise improvement in the performance of local services, with as many as 47% feeling that the administration has improved (aggregate of the responses of 'better' and 'mostly better'). In addition to Sjenica, the best performers in this regard include Surdulica (36%), Vranje (35%), Preševo (29%), and Blace (26%). At the opposite end of the spectrum are Merošina, where as many as 42% of those polled feel local services have deteriorated (aggregate of 'mostly worse' and

‘worse’), followed by Žitorađa (38%) and Prokuplje and Kuršumlija (with 30% each). The proportion of residents who feel performance has remained ‘the same’ is by far the greatest in Doljevac, at as much as 80%.

Most residents (somewhat over one-third in this year’s survey) who visit municipal/city offices are unable to say which of the local services is the most successful at its job; see Chart 9. The service generally used most heavily by residents, general affairs (or general administration), has again received the best scores; by its very nature, this service allows residents to complete their business in one visit (for instance, taking out excerpts from civil registers or personal certificates, and the like). Ranked second is the local tax administration.

A major change that attention must be drawn to when analysing these data has to do with construction permitting. Whilst in 2013 only 4% of those polled felt this service performed the best, this proportion is now somewhat higher, at 7%. Electronic construction permitting, which has shortened waiting times, reduced corruption, and promoted efficiency, is in all likelihood the reason behind this slight but nevertheless undoubtedly positive change.

*Chart 9. Which of the following municipal services operate the best?*

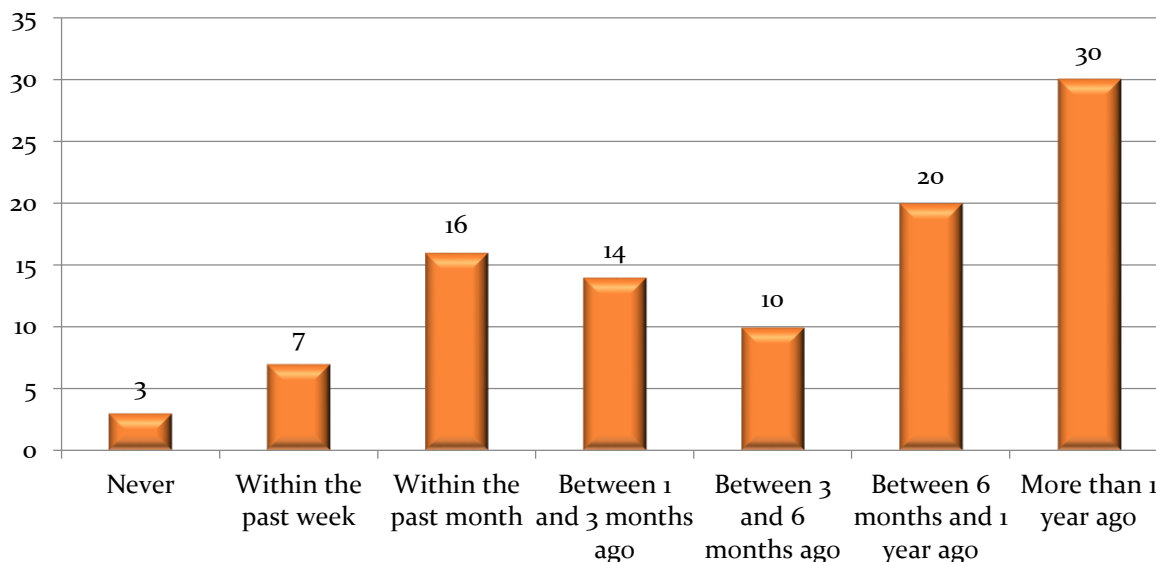


This poll introduced a new question to gauge the frequency of contacts with municipal services, so as to make it easier for the reader to understand the remoteness in time and relevance of the experiences on which respondents based their scores in this area.

The findings show that nearly every respondent in all local governments covered by the sample has had contact with a municipal service at least once: in other words, only 3%

were not in touch with one. Most residents (50% in aggregate) reported having visited the municipal offices 6 months or one year ago.

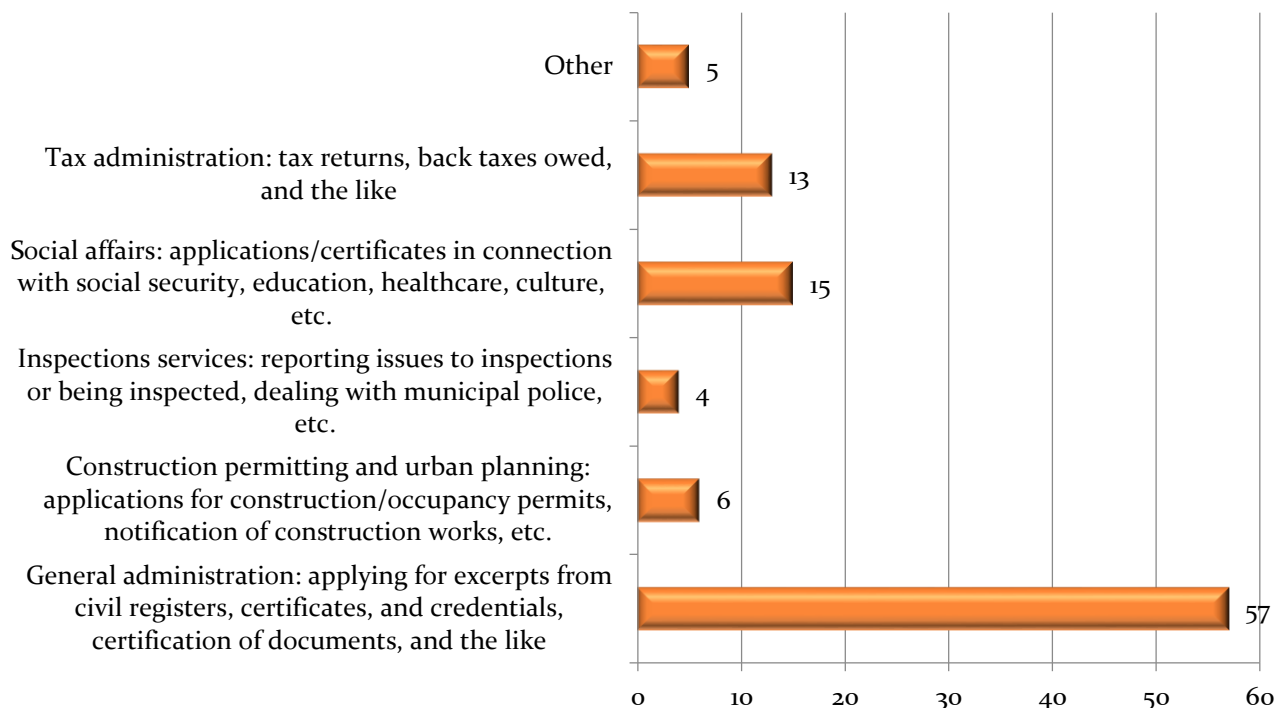
*Chart 10. When was the last time you visited the municipal office or municipal service centre (or service window)?*



Apart from the question about the most recent contact, another important query was related to which municipal service the respondent last communicated with, as it was both expected and likely for their scores to reflect that latest contact.

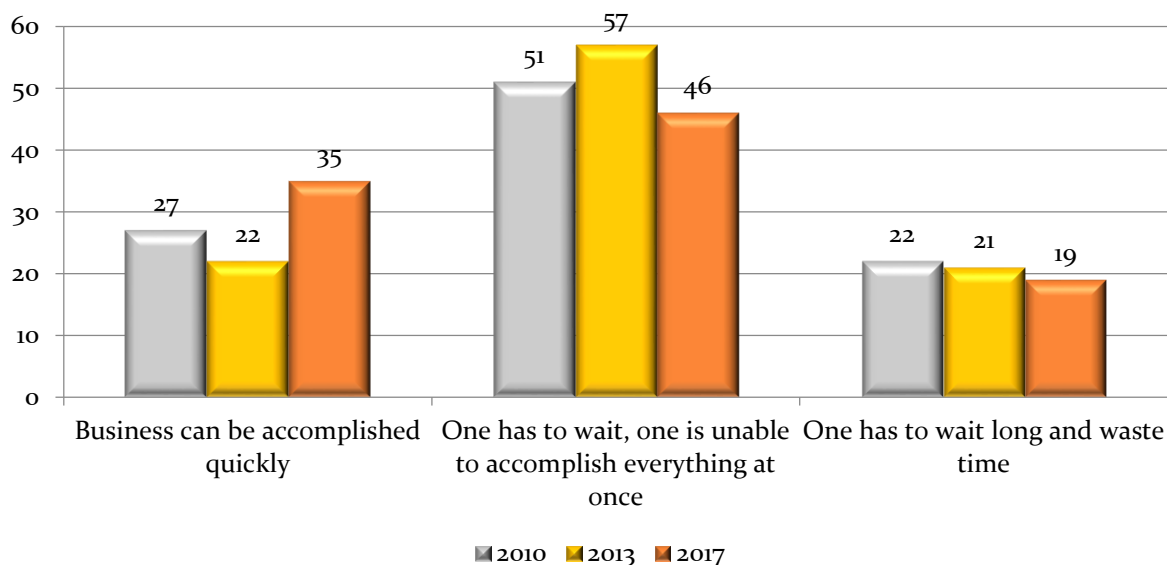
As many as 57% of those polled had their most recent contact with general administration, 15% communicated with what can broadly be termed 'social activities', whilst 13% did so with the local tax administration. All scores given in this section should be expected to reflect the performance of general administration: issuance of certificates and excerpts, and other similar tasks performed by a municipal general administration department. This is the context in which findings shown in Chart 9 ought to be interpreted: the reason why general administration is perceived as the best is, clearly, the frequency of contacts with this department.

*Chart 11. What was the most recent reason for your visit to the municipal/city offices or use of the e-Government web site for your municipality/city? (Which service were you in contact with?)*



Judging by the findings, **respondents can now accomplish their business with local governments more quickly**. And, whilst in 2010 and 2013 the numbers of those polled who felt they could complete their dealings with local authorities quickly stood at 27 and 22 percent, respectively, in this survey they number 35%; see Chart 12. There nonetheless remains a great deal of room to improve this area, as there has been no change in the number of respondents who feel a great deal of time is wasted, and that they are made to wait unjustifiably long (the findings here have seen minimal and negligible change, and range from 19 to 22 percent). As in previous polls, most respondents have again chosen the answer whereby the speed with which business with the local authority is not always optimal, but is still acceptable.

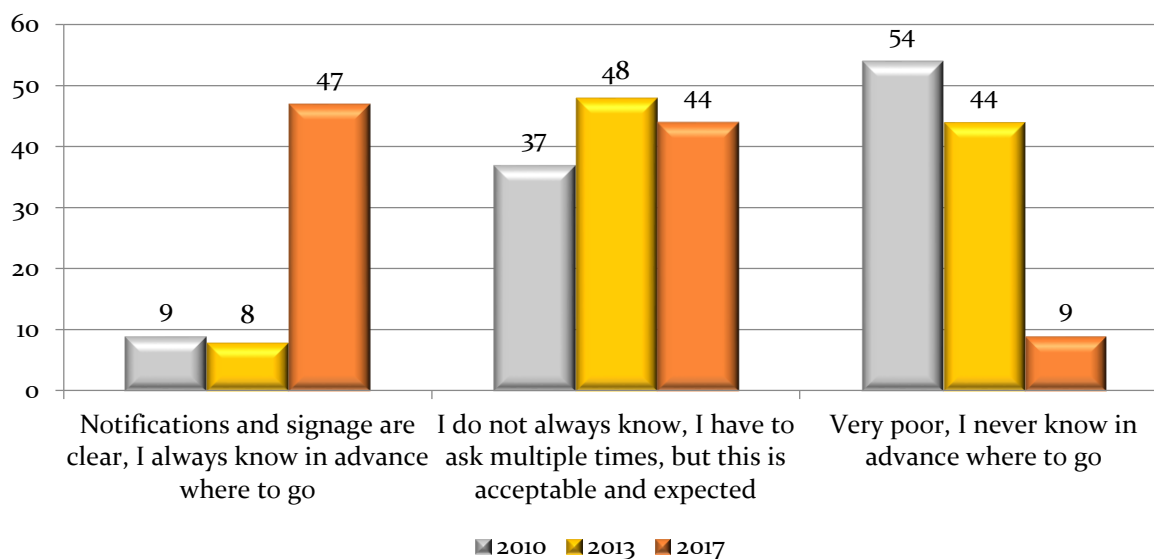
Chart 12. How quickly can you accomplish things at the municipal office when you visit?



The poll found major differences between the local authorities in this respect as well. Thus, judging by what respondents have reported, by far the best result in terms of citizen satisfaction with the speed with which procedures can be completed was recorded in Vladičin Han (where 79% of those polled chose the answer of ‘business can be accomplished quickly’). Tutin comes next (with 53%), followed by Blace (52%). The situation in Doljevac is much worse, where 40% of those polled feel they have to wait and waste time. This category also includes Merošina (where 30% share this view) and Aleksinac (at 25%).

**One of the most favourable findings of this year’s citizen satisfaction survey pertains to how notices and signage are arranged in local governments.** And, whilst seven and four years ago at most 9% of all respondents believed the provision of information at municipal offices was well organised, this figure is now much higher, standing at a full 47%. There has been, on the other hand, a comparable decline in the number of residents who have trouble accessing information, from 54 and 44 percent, respectively, to a mere 9%. Such vast differences cannot be explained only by a shift in perception: there must have been objective and real change in this area due to local governments’ activities to improve the way information is delivered to residents. The findings are highly positive, but also set new standards for local authorities, which ought to justify the trust placed in them by the public, maintain it at such a high level and, indeed, ensure further improvements are made.

Chart 13. Are notifications and signage clear at the municipal office?

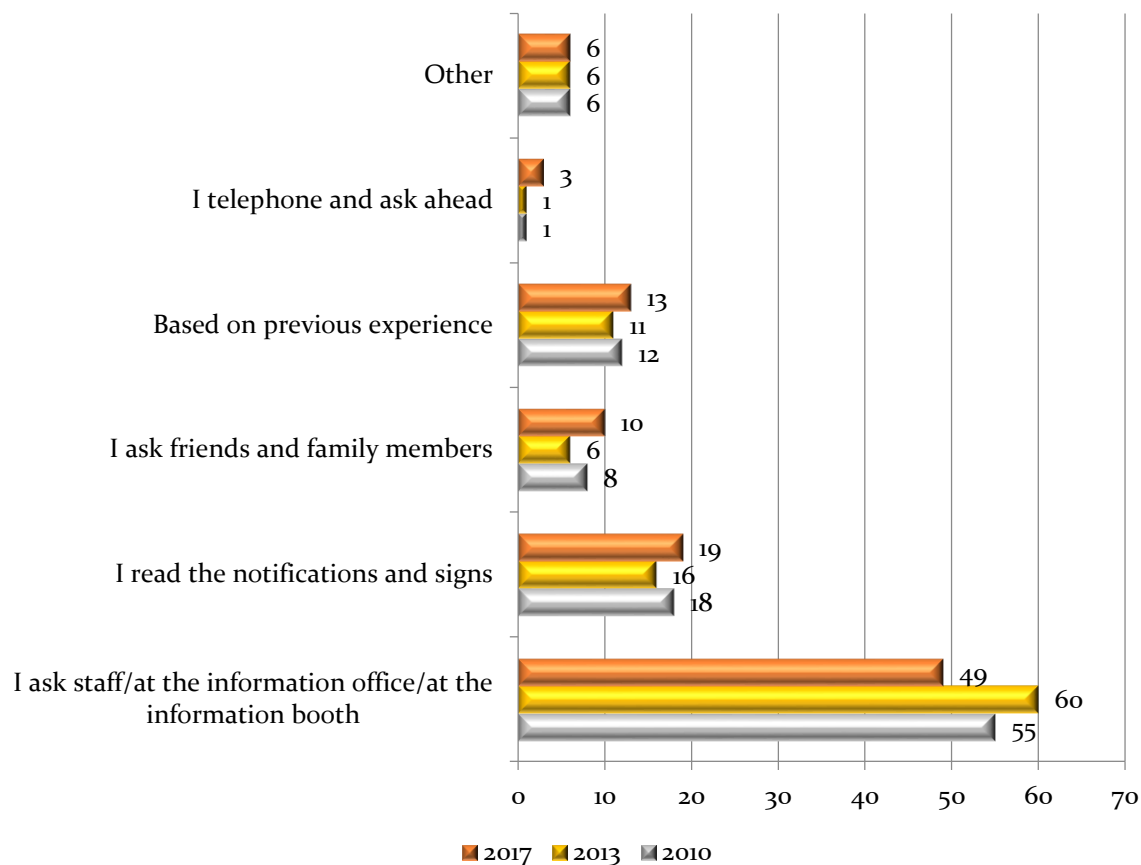


The inhabitants of Bosilegrad are the happiest with how information is provided in their town hall (as many as 77% there claim that ‘notifications and signage are clear’), followed by the residents of Vladičin Han (with 74%) and Knjaževac (70%). By contrast, in a number of municipalities the proportion of residents who believe information is difficult to obtain exceeds the average (of 10%); this group comprises Prokuplje (16%), Vranje (15%), Babušnica (14%), and Žitorađa and Lebane (11% each).

**The information booth (where available) and municipal staff are the key sources of information for residents who visit the local authority’s offices (as reported by 49%);** see Chart 14. This number is somewhat lower than in previous polls (when it stood at 55 and 60 percent, respectively), but is still much greater relative to all other responses.

All local authorities ought to in the future do more to provide better, clearer, and more comprehensive written information about procedures that their residents must follow. Written sources are used relatively infrequently, and this situation has not changed much. Once such written descriptions of procedures are developed, the local governments should do more to promote them, as this would make life easier for both civil servants and residents. The municipal officers would be required to devote less time to explaining issues and could so focus on actual casework and residents’ applications, whilst members of the public would find written information much more useful since it is much more accurate than one’s own experiences or those of others, which can prove unreliable.

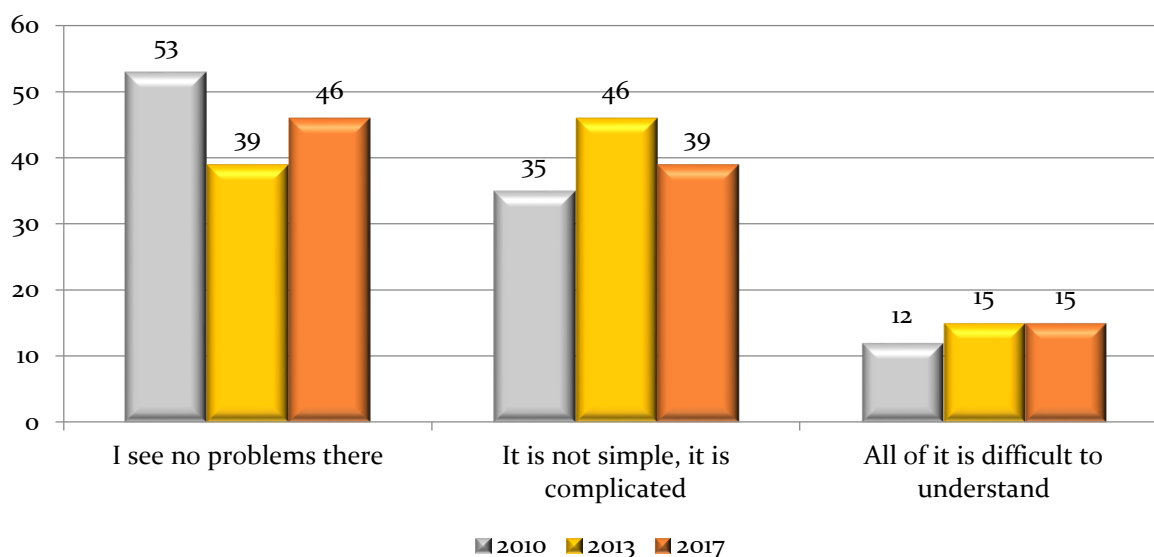
Chart 14. How do you know which office/window to go to at the municipal office?



Complicated procedures, a frequently cited obstacle to the exercise of citizens' rights with public administration bodies, do not seem to have changed much over the past seven years in the region surveyed. Although most respondents (45%) claimed there were no major issues with the complexity of procedures, it should not be ignored that 39% feel procedures are excessively complex, as well as that 15% often do not understand what some procedures may be about.

What should one make of the fact that the major strides made in local government performance are not reflected in how complex procedures are perceived to be? Firstly, numerous procedures followed by local governments are regulated by national legislation, and local authorities are unable to do much to simplify them; moreover, local governments also perform various delegated tasks for which procedures are prescribed by central government, again restricting local bodies' ability to simplify these processes. In these cases, local governments can invest additional effort into providing information to residents about the procedures they cannot change (by shortening deadlines, cutting documentation requirements, or reducing unnecessary steps).

*Chart 15. How would you rate the complexity of accomplishing your business at the municipal office?*

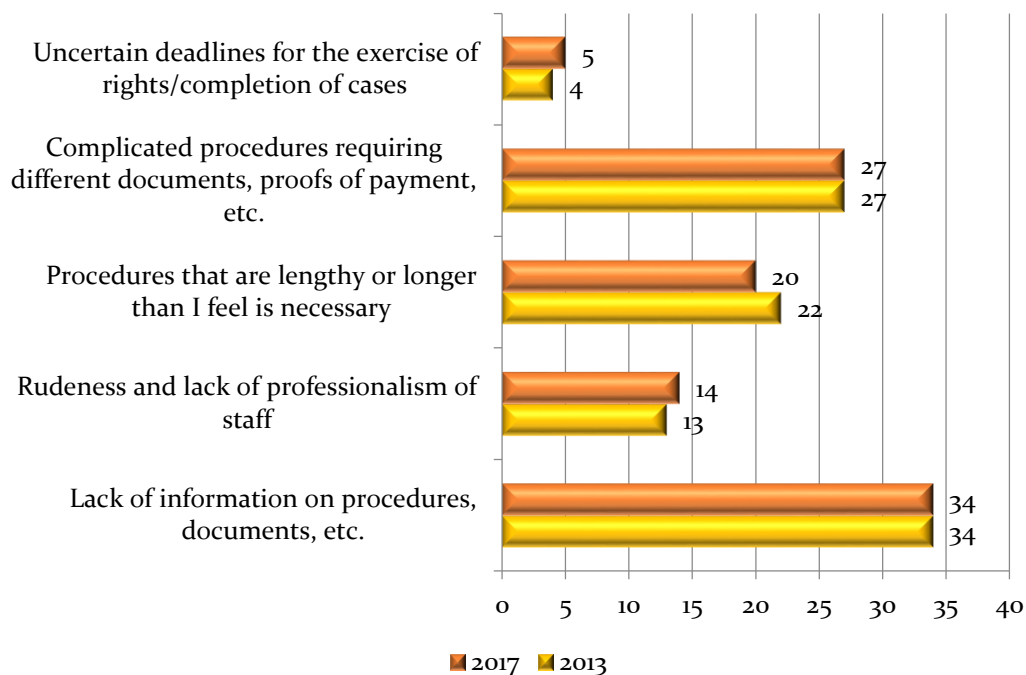


When it comes to how complex procedures are perceived to be, satisfaction is above-average (i.e. more than 46% of those polled claim to see 'no problems there') in many communities, with by far the best results seen in Bosilegrad (73%), Knjaževac (72%), Surdulica (65%), and Bela Palanka and Vladičin Han (61% each). This issue is at its most pressing in Doljevac and Kuršumlija (where the percentage stands at 27% each), as well as in Vlasotince (23%).

Of the many possible obstacles to exercising their rights, **residents assign the greatest importance to lack of information (with the numbers being the same in both surveys where this question was asked, at 34%),** followed by the complexity of procedures (again reported by the same proportion of respondents, of 27%). Lengthy procedures are ranked third (with about 20%), whilst respondents believe that the impoliteness and lack of professionalism on the part of civil servants, as well as uncertain deadlines for accomplishing their business with local governments, are the least problematic.

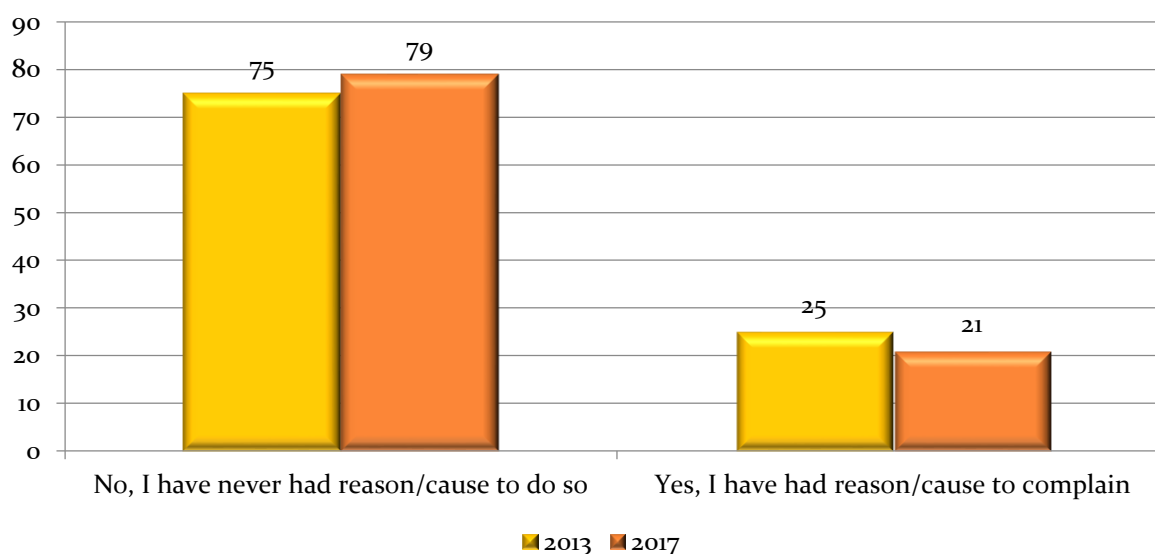
This question could be viewed as 'artificial' to some extent, since the respondents were required to focus on one key issue: in other words, they could not say none of the issues listed was a problem. The aim here was to allow the problems to be identified and ranked by their relative importance, and so the findings should not be viewed in absolute terms.

*Chart 16. What is the greatest impediment (obstacle) in communicating with the municipal administration?*



Although the number of respondents claiming to have had cause to complain against a civil servant has gone down over the past four years (from 25 to 21 percent), this figure of nearly one-fifth is still relatively high; see Chart 17.

*Chart 17. Have you ever had reason/cause to complain against a city/municipal civil servant?*



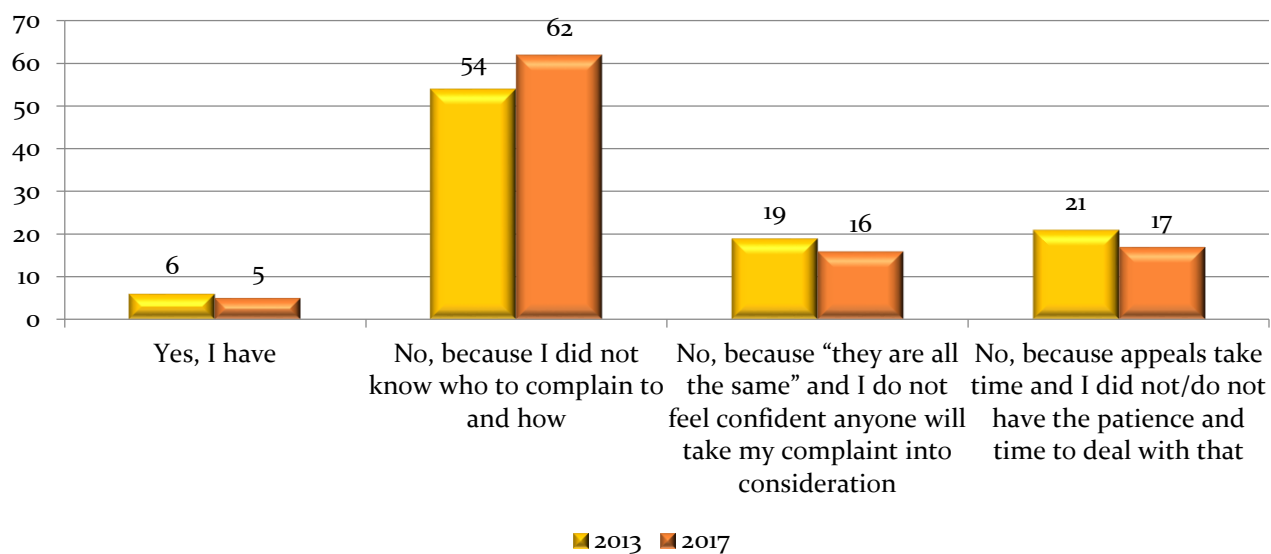
The greatest proportions of those polled in Merošina (36%), Žitorađa (35%), Prokuplje (34%), Vranje (32%), and Novi Pazar (31%) believe they had grounds to complain. By contrast, this figure is the lowest in Crna Trava (less than 1%), Bojnik and Vlasotince (3% each), and Svrlijig, Nova Varoš, and Gadžin Han (with 6% each).

By contrast, although 21% of those polled had reason to complain, a mere 5% actually did lodge complaints, a finding identical to that seen four years ago. See Chart 18.

**Lack of information as to how to complain and who to lodge grievances with has again come to the fore as the key reason for choosing not to complain** (as reported by 62% of those polled). Another 16% did not complain because they felt there was no municipal authority to deal with their complaint impartially, whilst a further 17% believed that the complaints procedure took excessively long and was a waste of time. These findings have not changed much relative to the 2013 survey.

Percentages of residents who believe that they have had cause, reason, or need to complain against a civil servant (whether in connection with a procedure or the outcome of a case) vary by municipality. However, **one thing that the surveyed local communities have in common is that however great the number of those who feel they have had cause to complain, the number of those who actually do so is always lower.** This fact underlines the chronic trend of mistrust in the ability of the municipal system and its leaders to consider its own failings and foster change from within. On the other hand, there is a significant percentage of those who cite lack of information about complaint procedures as the reason for not complaining against civil servants. Local authorities covered by this survey are in this respect no different from the trend seen in all communities throughout Serbia. As there has been no progress in this regard relative to the previous survey, all local authorities still have a great deal to do to establish an effective complaints system, which constitutes a key aspect of good governance.

*Chart 18. And have you ever actually complained against a civil servant, whether in connection with a procedure or the outcome of a case?*

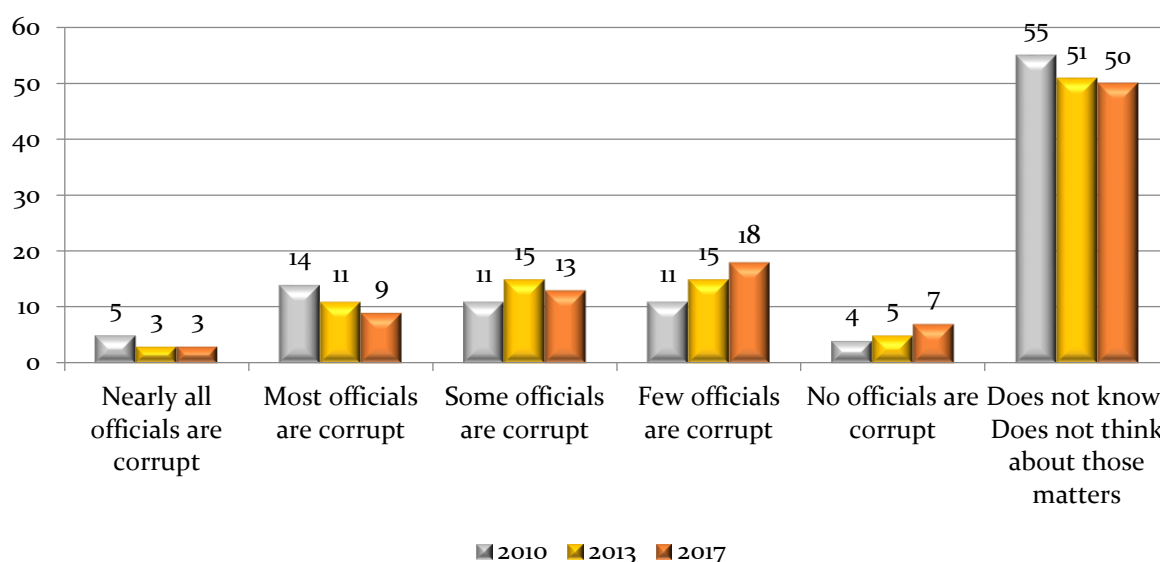


## 7. Perception of the extent of corruption at local authorities

Respondents were again asked to say how widespread they felt corruption was amongst officers of their municipality/city in terms of the estimated number of corrupt officers. Although residents most often said they could not tell, the distribution of other answers allows us to report a slight decline in perceived corruption at the local level over the past four (or seven) years. This conclusion is borne out by the constant increase in the number of responses indicating few civil servants are corrupt (these range from 11 to 18 percent) or that none are so (from 4 to 7 percent); see Chart 19.

Although corruption is following a downward trend (regardless of whether this is only a matter of perception, or is based in actual knowledge and experience), this finding should continue to focus on whether respondents recognise some local civil servants (or perhaps just one civil servant) prone to corruption: ready to seek or accept bribes and exceed the bounds of their authority to favour a particular member of the public (even if this involves breaching regulations or procedures, treating residents unequally, etc.). For as long as there are any civil servants who exhibit this type of behaviour, both preventive and repressive mechanisms will have to be strengthened to tackle corruption and its root causes.

*Chart 19. In your view, how widespread is corruption amongst municipal officials?*



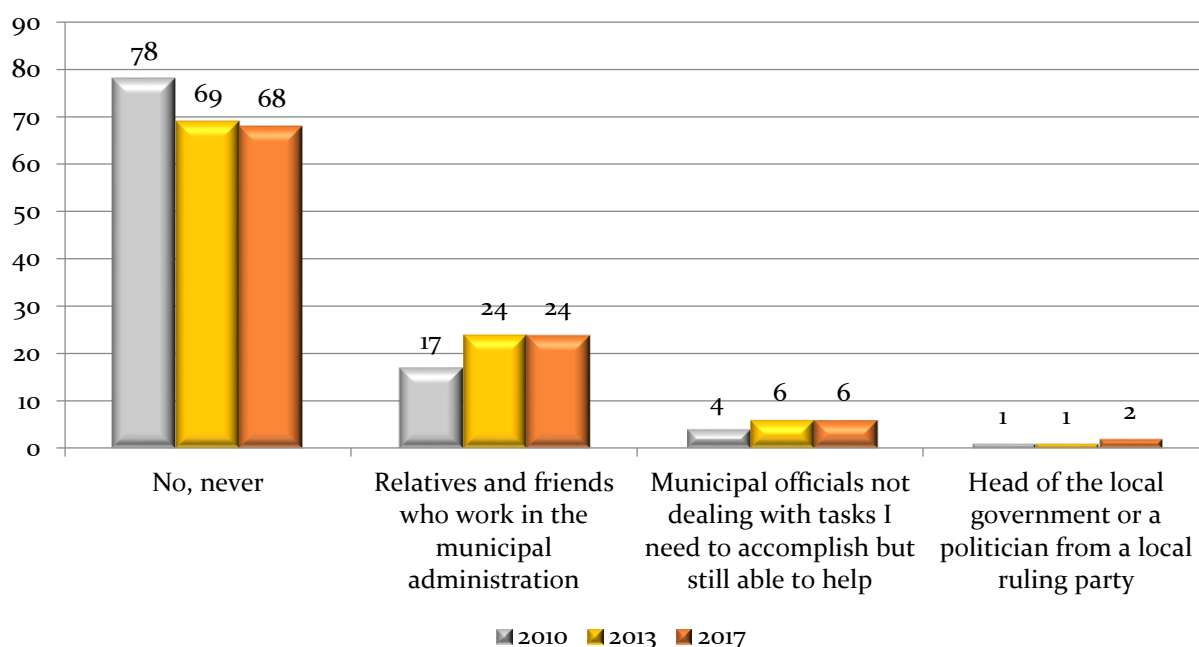
There is a very broad spectrum of possible causes and manifestations of corruption. Whilst some are criminal offences (for instance, giving or taking bribes, or abuse of power), others are instances of unethical behaviour that jeopardises institutional integrity and threatens the impartial and unbiased operation of the entire system. One of such forms of corruption is nepotism, the use of family connections, friendship, or

acquaintance to facilitate or expedite the exercise of legitimate rights, obtain benefits that would otherwise not be accessible, or ensure outcomes that would otherwise be different. All of these issues are highly significant from the perspective of equality and equity, as nepotism directly results in the creation of a privileged group of people, whilst at the same time denying rights to other residents who lack such underhand contacts with the local authority.

Unfortunately, the responses to this question reveal a slight negative trend in the municipalities surveyed. First off, there has been a decline in the number of respondents who reported never having used such connections (from 78 to 68 percent). Also, 2013 saw a slight increase in the proportion of respondents who claimed to have made use of this illicit option relative to 2010, with this figure remaining the same in 2017.

When interpreting these results, the question must be asked of whether there has actually been a change in respondents' habits, or whether they are now simply readier to admit to such behaviour to a greater extent and more freely. Whatever the answer may be (and it requires deeper and more complex analysis than can be made in this research alone), much more work and effort will be required to eliminate this practice, or at least reduce it to the level of isolated incident.

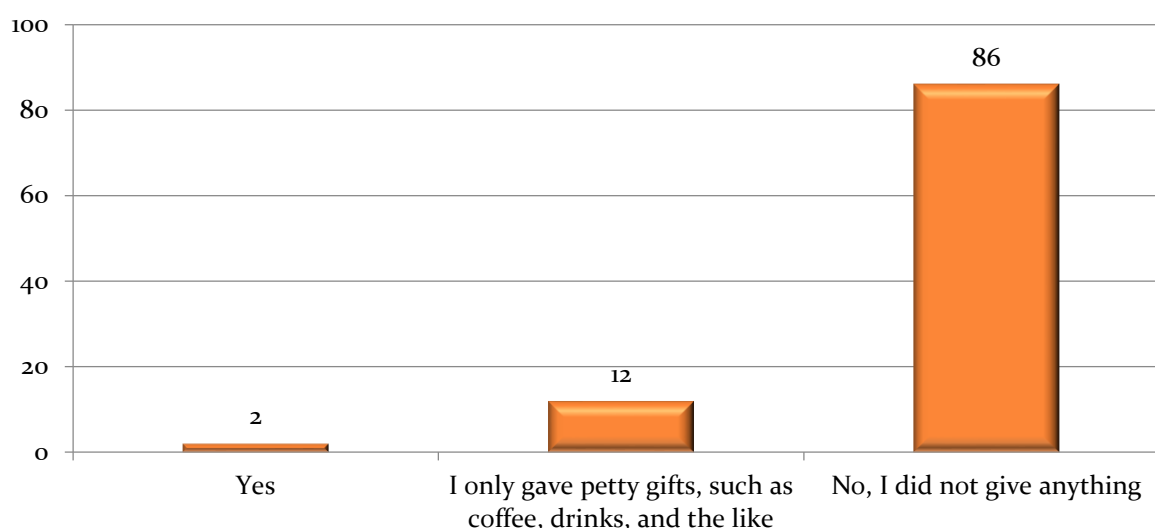
*Chart 20. Have you or have you not used connections or acquaintance to facilitate your dealings with the municipality?*



Our examination of corruption was broadened in this poll with the introduction of a question about giving and taking bribes, the most common form that corruption takes. With 2% of all respondents reporting this behaviour, it is relatively rare in statistical terms, but quite frequent in practice; see Chart 22. What does this actually mean? In absolute numbers, the 2% means a rather large proportion of residents of a municipality or clients of the local government admit to having committed a crime. Moreover, the figures imply that some (more or fewer) local civil servants are part of corruption rings in local authorities.

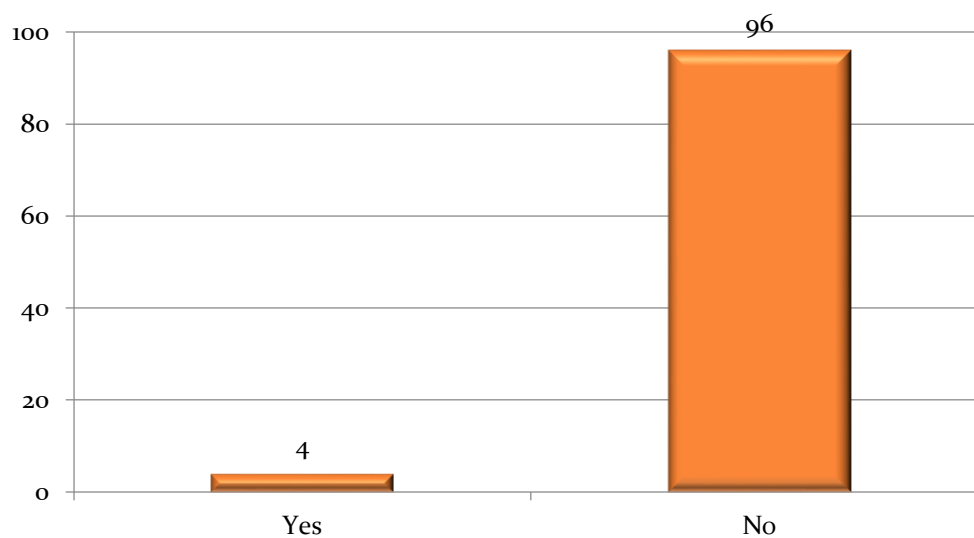
Also worrisome is the finding that another 12% of those polled are in the habit of treating civil servants to petty gifts such as coffee, beverages, sweets, and so on. Again, this implies that a not so insignificant number of civil servants are ready to receive these presents, a practice that should also be curtailed.

*Chart 21. Have you ever paid a municipal civil servant extra in exchange for a service?*



An equal cause for concern is the finding that as many as 4% of those polled have at some point received a direct or indirect request for a bribe from a civil servant; see Chart 23. These are serious results, and indicate more work needs to be done to introduce anti-corruption measures and raise awareness amongst both members of the public and civil servants about the harmful consequences of corruption.

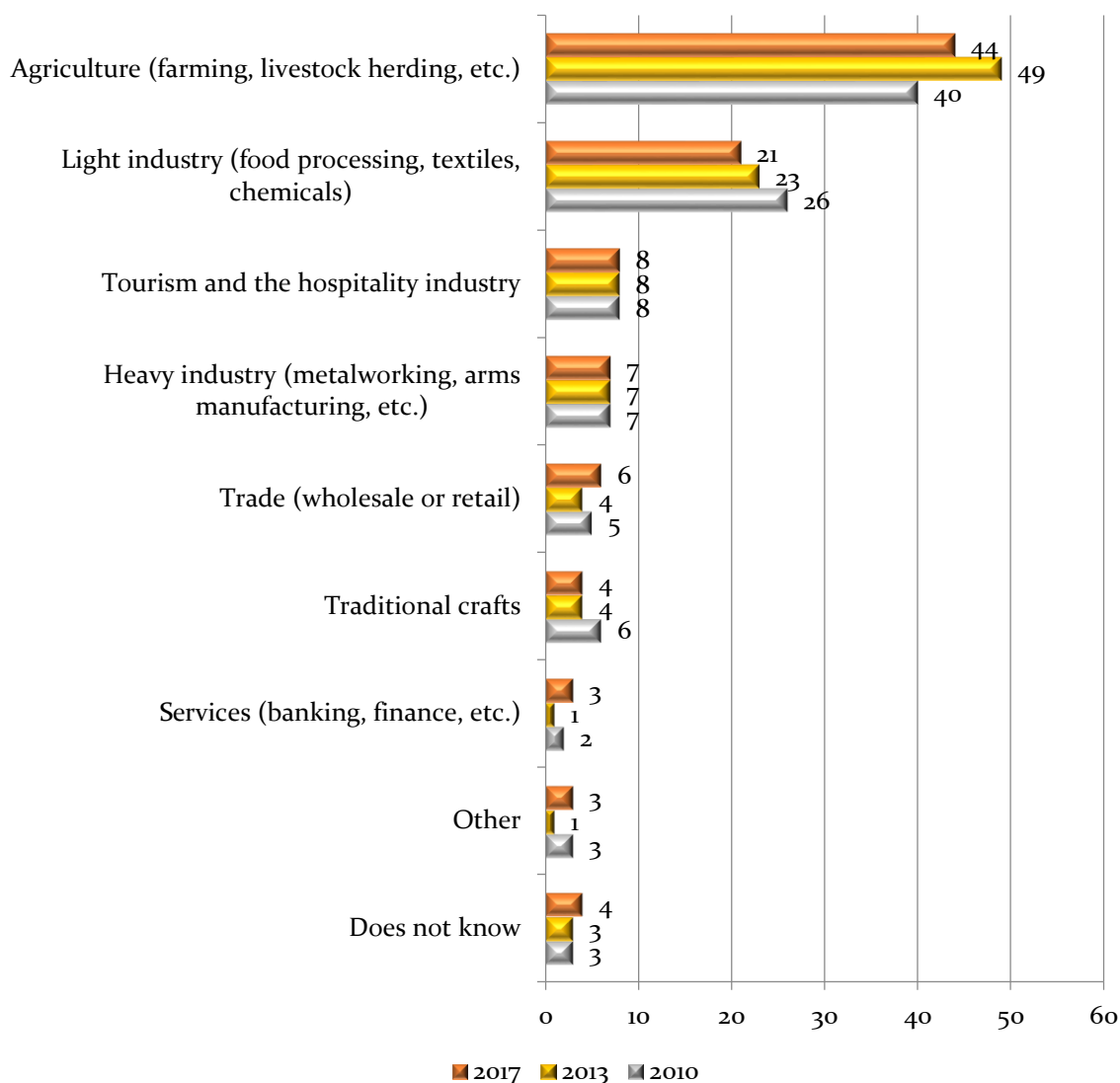
*Chart 22. Has a municipal civil servant ever requested extra payment for a service they were required to provide?*



## 8. Directions and priorities of municipal development

In each local authority, and, as such, in the entire region, agriculture continues to be perceived as the industry that should drive future economic development (as reported by 44% of those polled). This finding lies somewhere between the results of the two previous surveys (with 40% seen in 2010, and 49% in 2013); see Chart 23. Ranked second, with a slight decline in share, is light industry (at 21%), whilst all other sectors have remained nearly unchanged relative to previous surveys. This poll has seen a slight increase in the proportion of respondents who feel that local development should be based on trade and services.

*Chart 23. Which industry should be the basis of future economic growth of your municipality?*



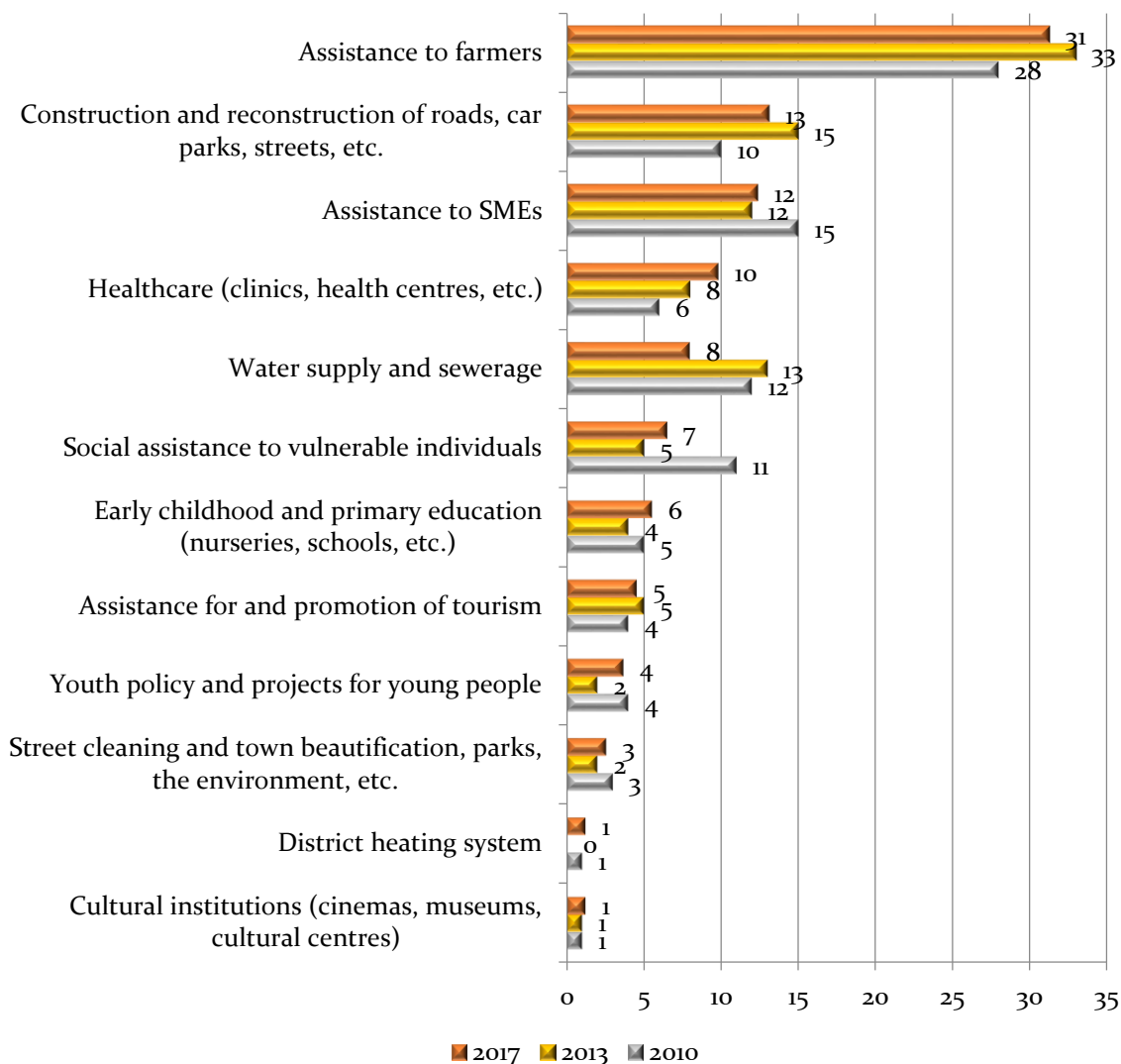
Agriculture is acknowledged as the driver of future development in 28 of the 34 communities covered by this survey. Nevertheless, there are major differences in how many residents accord priority to this industry, with the figures ranging from 28% in Raška to as much as 98% in Bojnik. In six communities it is light industry, rather than agriculture, that comes first (Novi Pazar, Preševo, Vladičin Han, Vranje, and Bela Palanka), with one opting for heavy industry (Priboj).

The public perception that agriculture is the way forward for most local authorities surveyed is also borne out by the fact that nearly one-third of those polled (31%) feel municipal resources should be utilised to assist farmers; see Chart 24. This finding has varied from one cycle to the next, but not to such an extent as to cause us to question the conclusion that assistance and incentives to farmers are the key area for municipal investment.

In second place by importance is **investment into infrastructure**, particularly roads, as well as **assistance, incentives, and subsidies for small and medium-sized firms**. There has been steady growth in the proportion of respondents who believe **investment into healthcare is of primary importance**, evidencing the ageing of local populations, poor state of repair of healthcare institutions, and increasing problems with attracting appropriate healthcare professionals in local communities (especially in smaller municipalities, which often lack doctors specialising in key fields of medicine).

As for other potential areas for investment, there have been no major or dramatic developments, and the state of affairs is similar to that seen in previous polls. Some slight changes are in evidence in the decline in the share of respondents who see investment into water supply and sewerage and social welfare programmes as priorities. This can mean either of two things: the situation in these fields may have improved, thus reducing the need for intervention and investment, or budgetary constraints may mean other priorities have come to the fore over the past four or seven years.

Chart 24. Which of the following areas should attract the most investment in the municipality?

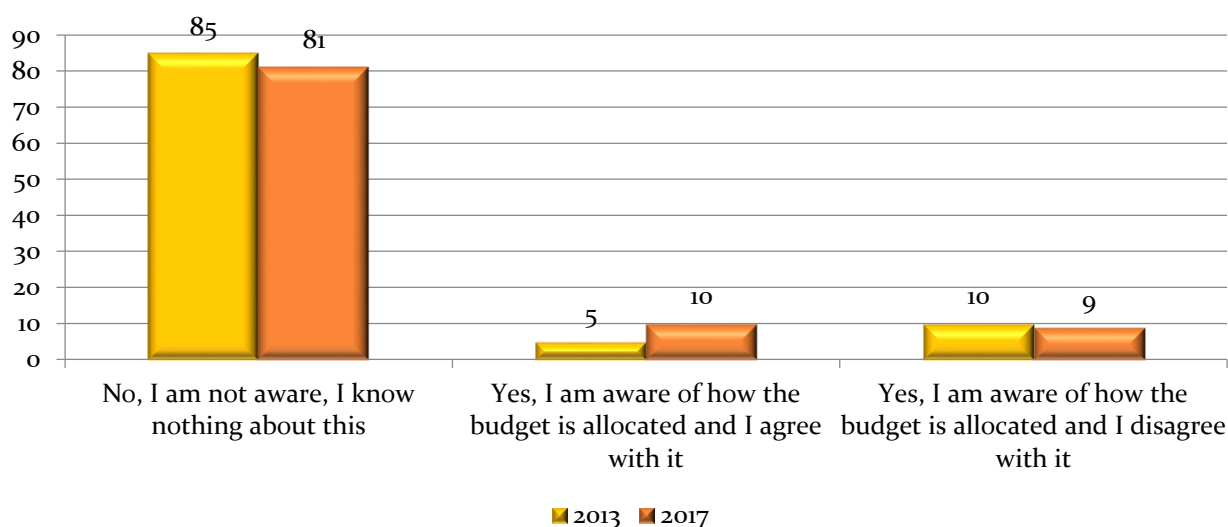


There are major differences between local governments in this respect. Although assistance to farmers is the most widely recognised priority in most communities, in some municipalities the findings indicate major issues in other areas as well, with those topics seen as warranting the most investment. For instance, in Doljevac and Tutin water supply and sewerage are seen as the most pressing problems (as reported by as much as 68% and 34% of those polled, respectively); road building and maintenance is also a major issue in Tutin (54%); assistance to SMEs is a priority for Bela Palanka (44%); and so on. Detailed information about these issues is available in individual reports for each community.

Most respondents are still completely ignorant of the budget policies of their cities and municipalities (as reported by 81% of those polled), and are unaware of the priorities even for the development-oriented segment of the budget; see Chart 25. Nevertheless, this percentage is somewhat lower than four years ago (when it stood at 85%), meaning

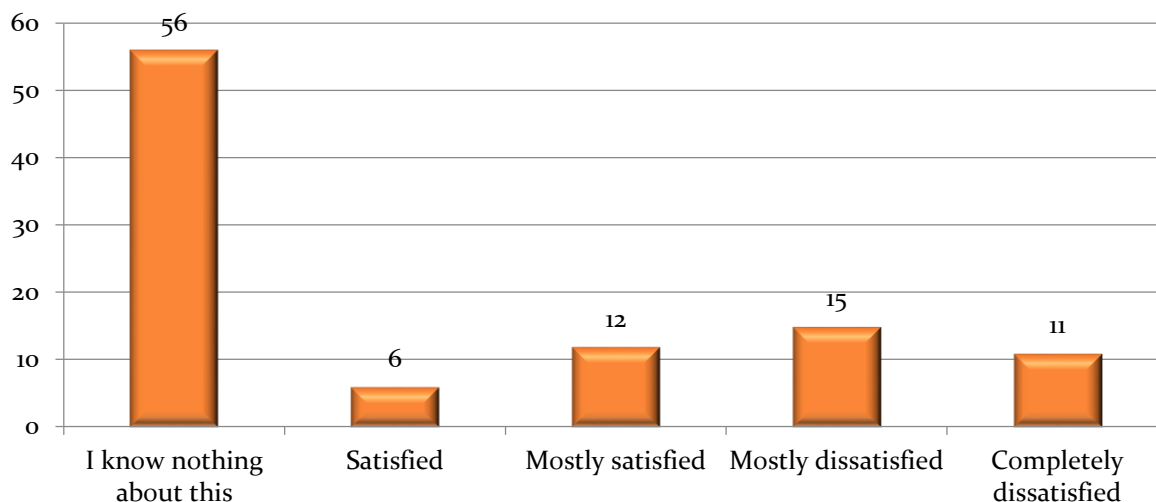
that more respondents are now aware of local budget policy. In a positive development, there has been an increase not only in the proportion of local inhabitants who feel they are sufficiently informed about this issue, but also in the share of respondents who agree with and support their local authorities' budget policies (from 5 to 10 percent). Of course, this finding ought to be interpreted with some reservation, as the question did not test actual but rather perceived knowledge, in common with all other such queries.

*Chart 25. Are you aware of budget priorities (allocation of the budget) of your local authority, and do you agree with them?*



In keeping with the overall purpose of the research, namely to gauge citizen satisfaction with various aspects of daily life in local communities, in this poll we also asked a simple question about satisfaction, or lack thereof, with how the local budget is managed. As expected, most respondents reported not knowing anything about this issue; see Chart 26. However, to properly understand the state of affairs in this area, we ought to also look at the distribution of responses (in aggregate, 18% satisfied vs 26% dissatisfied), which bears out the assumption that much more needs to be done to increase citizen satisfaction, or at the very least to promote knowledge of budget policy and understanding that the limited nature of budgets means not everyone will always be completely satisfied.

*Chart 26. Are you satisfied with how your local authority manages its budget?*

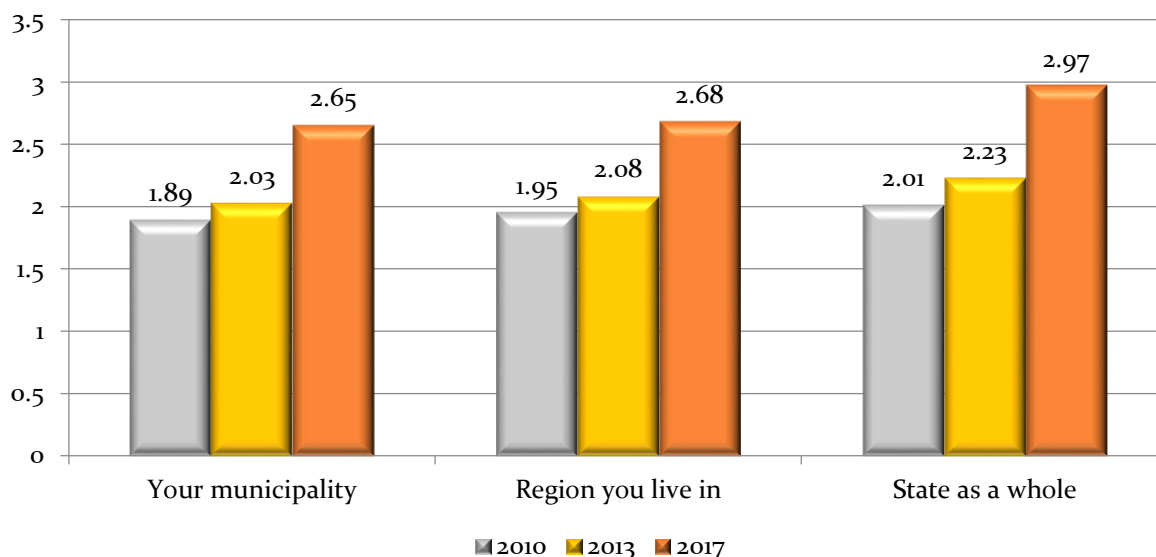


Although satisfaction with how local governments manage their budgets is relatively low across the board, this finding is much better than the average (which stands at 18%, the aggregate of 'satisfied' and 'mainly satisfied') in the following communities: Sjenica (52%), Bosilegrad (46%), Tutin (42%), Vranje (36%), Surdulica (33%), and so on. By contrast, dissatisfaction with budgeting is substantially above the average (of 26%) in Žitorađa (52%), Prijepolje (50%), Babušnica (44%), Vranje (41%), etc.

## 9. Local authorities and economic development

Each of the three cycles of the research focused on gauging public perceptions of the place and role of the local authority in local economic development. There has been substantial progress here, with the overall rating of the economic situation, the baseline question for this section, now much better than four or seven years ago. Changes are visible for all three levels tested (local, regional, and national). And, whilst in 2010 the score was under or at 2 (on a scale from 1 to 5), it is now closer to 3 for the national level; see Chart 27. The conclusion we can draw here is one of growing optimism about the economy, which can only be a positive development, given the social and economic characteristics of the region's municipalities as described in the introduction to this report.

Chart 27. Average rating of the economic situation



Apart from scoring the current economic situation, the respondents were asked to state to what extent, in their opinion, their local authority was ready to support the development of private enterprise; see Table 1.

Local governments' impact on the development of private enterprise was assessed through four discrete segments: *providing start-up capital*; *raising awareness for starting one's own business*; *reforming permitting regulations and procedures*; and *improving infrastructure*.

Although changes to the proportion of answers indicating that local authorities 'do enough' have been minimal over the past seven years (with the figure not exceeding 8% for any segment in any of the three polls), a key change that should inform interpretation of the findings in this area is the increase in responses claiming that local

governments do ‘as much as they can’. The share of these answers has increased from 11 to 14 percentage points across all four categories. What does this development mean? Local inhabitants are becoming more aware of the limitations that their cities and municipalities face in fostering business, and are, seemingly, more tolerant of the local governments’ failure to provide incentives that are as strong as everyone would like them to be. Obviously, this view has been slow to change, with all for categories dominated by the answer that local authorities are ‘not doing enough’ and ‘could do much more’, but the change is an indicator of growing public understanding and, as such, is certainly positive.

*Table 1. Does the local authority do enough to foster the development of private enterprise?*

|                               | Providing start-up capital |      |      | Raising awareness for starting own business |      |      | Reforming permitting regulations and procedures |      |      | Infrastructure (constructing industrial zones, technology parks, etc.) |      |      |
|-------------------------------|----------------------------|------|------|---|------|------|---|------|------|--|------|------|
| <b>Research cycle</b>         | 2010                       | 2013 | 2017 | 2010  | 2013 | 2017 | 2010  | 2013 | 2017 | 2010   | 2013 | 2017 |
| No, it could do much more     | 51                         | 48   | 40   | 45  | 44   | 35   | 43  | 55   | 37   | 47   | 48   | 39   |
| It is doing as much as it can | 20                         | 26   | 33   | 24  | 28   | 37   | 22  | 34   | 33   | 18   | 23   | 32   |
| It is doing enough            | 4                          | 4    | 7    | 5   | 6    | 8    | 5   | 4    | 8    | 4  | 5    | 7    |
| Does not know                 | 25                         | 22   | 20   | 26  | 22   | 20   | 30  | 7    | 22   | 31   | 24   | 22   |

## 10. Satisfaction with areas of daily life

A key question in citizen satisfaction surveys concerns actual satisfaction with the quality of various aspects of the local environment. Let us first take a look at responses to a question that provides a good indication of overall satisfaction levels: 'How satisfied are you with the overall quality of life in your municipality?'; see Table 2. Four years ago, as many as 60% of those polled claimed to be dissatisfied with their quality of life, whilst as few as 15% were satisfied. Although disaffection still outweighs satisfaction, the gap has narrowed, with 44% of all respondents reporting dissatisfaction, and 23% claiming to be satisfied. Even though much remains to be done to improve overall quality of life, a positive trend is in evidence: at this juncture, this favourable development can have both a practical and a psychological impact on local inhabitants, officials, and all other stakeholders able to influence quality of life.

A look at the individual issues reveals that the situation has either changed slightly or has remained the same. Perceived quality has declined for a very small number of issues, and, even where it has, the differences are truly slight.

Residents are still the least satisfied with the state of the utility infrastructure (water supply, sewerage, district heating), as reported by 52% of those polled, and transportation, as cited by 51%. By contrast, satisfaction is still the highest with civic solidarity and readiness of fellow residents to help when needed (at 56%), quality of the education system (53%), and safety and security (48%).

Overall dissatisfaction has declined the most relative to the previous survey (by 16 percentage points). In addition, local inhabitants are now less unhappy with the state of infrastructure and availability of sports and recreation venues (a decline of 13 percentage points), quality of the environment (with a decline of 12 percentage points), and transportation and availability of cultural institutions (a drop of 10 percentage points in both cases).

*Table 2. Satisfaction with areas of daily life in the municipality/city*

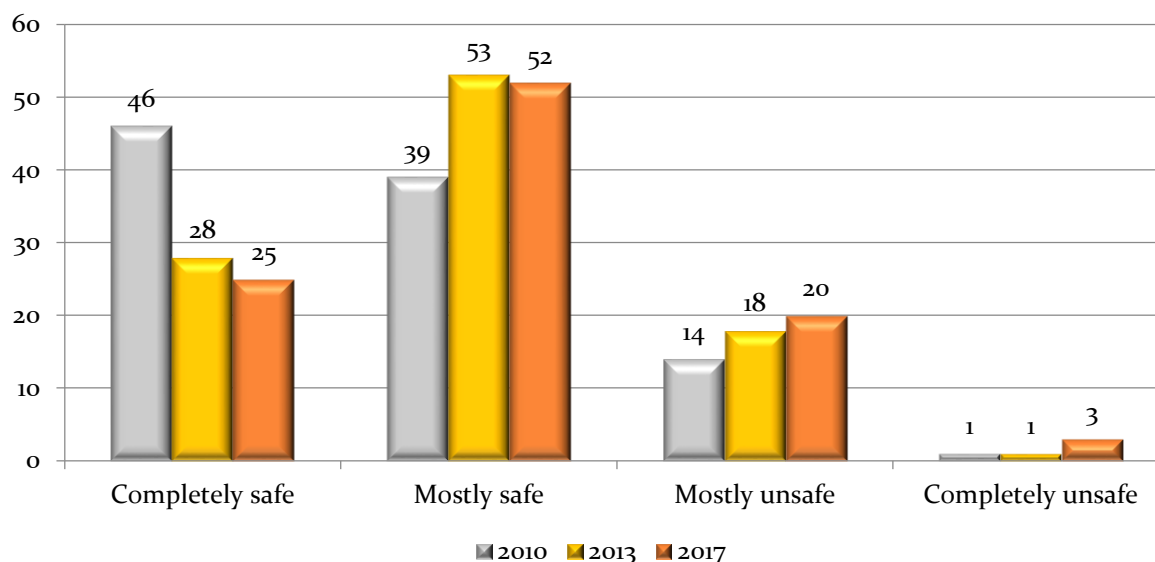
| <i>Area</i>   | <i>Cycle</i> | Does not know, has no opinion | Not satisfied | Indifferent | Satisfied |
|---|--------------|-------------------------------|---------------|-------------|-----------|
| State of infrastructure (heating, water supply, sewerage) | 2013         | 4                             | 63            | 14          | 19        |
|   | 2017         | 1                             | 65            | 14          | 20        |
|   | 2013         | 4                             | 52            | 19          | 26        |
| Transportation (urban or suburban)                        | 2017         | 4                             | 53            | 14          | 29        |
|   | 2013         | 3                             | 61            | 14          | 22        |
|   | 2017         | 3                             | 51            | 21          | 25        |
| Cleanliness of the city/town you live in                  | 2013         | 2                             | 55            | 16          | 27        |
|   | 2017         | 1                             | 50            | 17          | 32        |

|  |      |    |    |    |    |
|--|------|----|----|----|----|
|  | 2013 | 2  | 41 | 23 | 33 |
| Quality of educational institutions<br>(schools, nurseries, etc.)      | 2017 | 4  | 30 | 18 | 48 |
|  | 2013 | 6  | 27 | 18 | 49 |
|  | 2017 | 2  | 30 | 15 | 53 |
| Availability of retail outlets   | 2013 | 2  | 30 | 15 | 53 |
|  | 2017 | 1  | 33 | 15 | 51 |
|  | 2013 | 3  | 32 | 20 | 46 |
| Quality of healthcare (clinics, health<br>centres, etc.)               | 2017 | 2  | 45 | 15 | 38 |
|  | 2013 | 1  | 49 | 15 | 35 |
|  | 2017 | 2  | 45 | 21 | 31 |
| Availability of cultural institutions                                  | 2013 | 12 | 47 | 20 | 21 |
|  | 2017 | 8  | 50 | 22 | 20 |
|  | 2013 | 7  | 40 | 25 | 27 |
| Availability of facilities for sports and<br>recreation                | 2017 | 12 | 39 | 21 | 28 |
|  | 2013 | 7  | 46 | 21 | 26 |
|  | 2017 | 7  | 33 | 25 | 35 |
| Proximity of post offices, banks,<br>exchange offices, etc.            | 2013 | 2  | 38 | 13 | 47 |
|  | 2017 | 1  | 34 | 14 | 51 |
|  | 2013 | 4  | 33 | 17 | 46 |
| Safety and security in the street,<br>neighbourhood, etc.              | 2017 | 2  | 27 | 13 | 58 |
|  | 2013 | 1  | 27 | 15 | 57 |
|  | 2017 | 3  | 29 | 21 | 48 |
| State of municipal administration<br>(service windows, administration) | 2013 | 11 | 37 | 23 | 29 |
|  | 2017 | 9  | 38 | 28 | 25 |
|  | 2013 | 10 | 32 | 30 | 29 |
| State of local markets   | 2017 | 6  | 25 | 22 | 47 |
|  | 2013 | 5  | 20 | 24 | 51 |
|  | 2017 | 7  | 21 | 26 | 46 |
| Solidarity of the public and<br>neighbours, willingness to help        | 2013 | 3  | 19 | 15 | 63 |
|  | 2017 | 1  | 18 | 17 | 64 |
|  | 2013 | 4  | 18 | 22 | 56 |
| Townscape, urban planning,<br>construction                             | 2017 | 16 | 49 | 23 | 12 |
|  | 2013 | 23 | 40 | 23 | 14 |
|  | 2017 | 20 | 39 | 25 | 15 |
| Ability of all local residents to<br>exercise their rights equally     | 2013 | 13 | 40 | 20 | 27 |
|  | 2017 | 13 | 52 | 20 | 15 |
|  | 2013 | 11 | 50 | 23 | 17 |
| Public participation in designing and<br>executing the budget          | 2017 | 23 | 52 | 17 | 8  |
|  | 2013 | 22 | 46 | 20 | 12 |
| Overall quality of life in your<br>municipality                        | 2017 | 2  | 60 | 23 | 15 |
|  | 2013 | 4  | 44 | 29 | 23 |
| Quality of the environment in your<br>municipality                     | 2013 | 1  | 48 | 24 | 47 |
|  | 2017 | 4  | 37 | 27 | 33 |

## 11. Perceptions of safety

Perceptions of security in areas where respondents live have declined throughout the region comprising 34 local authorities. Whilst seven years ago as many as 46% of those polled felt safe, this figure fell to 28% thereafter, and has now dropped even further, to 24%. On the other hand, the number of respondents who report feeling ‘mostly’ or ‘completely’ unsafe has been growing: from 15%, to 19%, to 23% in this survey; see Chart 28. It is apparent that transformations that local communities are undergoing have been hurting social capital and cohesion (best summed up in a claim often heard in small towns, that ‘people don’t lock their doors even at night’). The deteriorating economic situation, growing poverty, altered perceptions of violence and its arguably more pervasive presence in the media and society, and even greater acceptability, have had an impact on people’s behaviour and promoted feelings of insecurity.

*Chart 28. Do you feel safe (secure) where you live?*



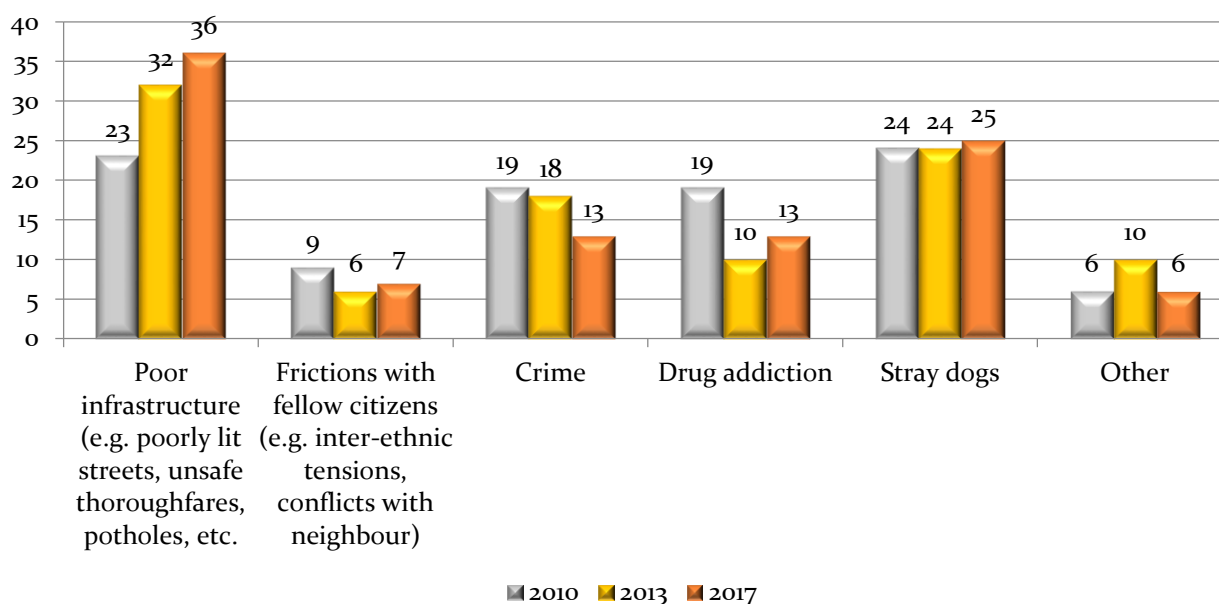
A slight upward trend in feelings of security is apparent over the past seven years. This increase is the most noticeable in larger cities and municipalities, where residents feel safe to an above-average extent (of 23%, the aggregate of ‘mostly’ and ‘completely safe’ across the entire sample); these are Novi Pazar (43%), Vranje (40%), and Leskovac (33%). The same trend is observable in some smaller communities (such as Lebane, Bosilegrad, and Medveđa, all with more than 30%). By contrast, subjective security is the lowest for the inhabitants of Gadžin Han, Svrlijig, Brus, and Vladičin Han (3% each), Prijepolje (4%), Blace and Crna Trava (5% each), and so on.

The reasons why inhabitants of the region feel unsafe have changed somewhat relative to 2010 and 2013; see Chart 29.

**First and foremost, there has been a constant increase in the number of respondents who feel unsafe due to issues with local infrastructure** (such as poorly lit streets, unsafe thoroughfares, and the like): this proportion has risen from 23% to 36% in this survey. By contrast, there has been a fall in feelings of insecurity due to crime or drug addiction. Finally, figures indicating concern over discord with fellow residents or inter-ethnic tensions, as well as fear of stray dogs, have remained almost unchanged.

The conclusions that can be drawn in this area are to some extent encouraging for local authorities in terms of how much they can do to improve the situation. Relatively small municipal investment into, for instance, street lighting or repairs to pavements or road surfaces, could contribute significantly to greater perceived security and safety amongst members of the public.

*Chart 29. What makes you feel unsafe?*

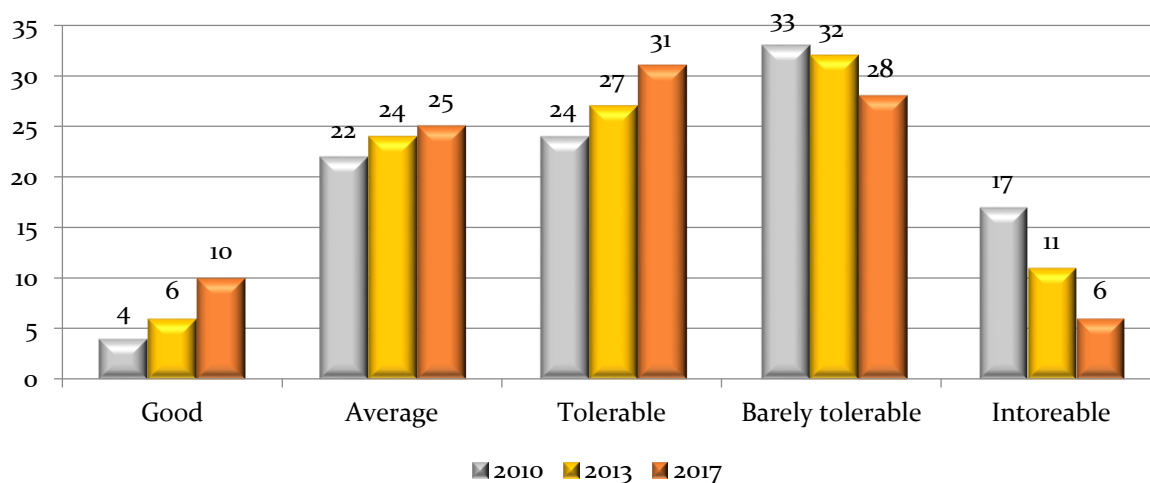


There are also major differences between communities in the drivers of insecurity. In some areas, as many as 100% of those polled chose poor infrastructure as the main reason for feeling unsafe (such as in Trgovište and Vlasotince); elsewhere the dominant concerns are drug addiction (Tutin, with 56%, and Aleksinac, at 35%), crime (Surdulica and Vladičin Han, with 37% each), frictions with fellow residents (Bojnik, Gadžin Han, Žitorađa, Svrlijig, Merošina, and Bela Palanka), and stray dogs (Nova Varoš and Ivanjica).

## 12. Perceptions of living standards

Perceived living standards have been growing slightly since the first survey, performed in 2010; this change is visible at both extremes of the scale. We have thus recorded an increase in the number of respondents claiming to 'live well' (from 4 to 10 percent), as well as in the number of those whose perceived living standards are 'average' (from 22 to 25 percent). On the other hand, a decline is noticeable in the proportion of respondents who answered their living standards were 'barely tolerable' (from 33 to 28 percent) or 'intolerable' (17 to 6 percent); see Chart 30. These data are certainly encouraging, even if they indicate nothing other than public perceptions and optimism. However, objective indicators of development and socio-economic data (discussed in greater detail in the introduction to this report) reveal that the public may rather be undergoing an adaptation to long-term deprivation and poor living conditions: in doing so, Serbians seem to be accepting and accounting for relatively low living standards as more tolerable, or, indeed, 'the new normal'. These considerations require looking at the findings from both angles at all times, and using both sets of information: subjective data, derived from opinion polling, and objective statistics.

*Chart 30. What are the circumstances in which you and your family live right now like?*

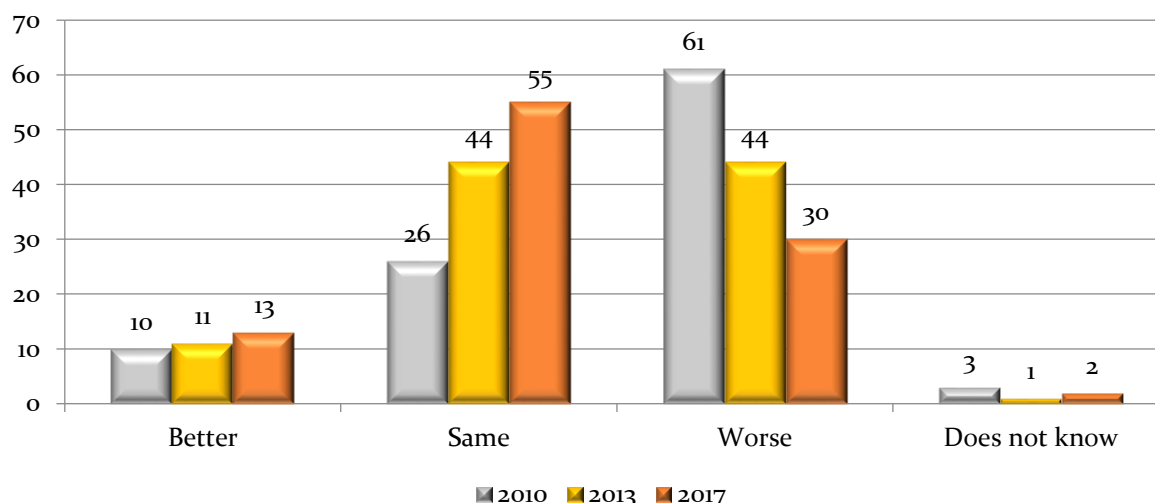


The only community that substantially differs from others in this regard is Tutin, where as many as 50% of all residents reported being 'well off'. Nowhere else is this percentage higher than 20%, and most commonly stands at close to the average of 10%.

The above finding should also inform our interpretation of answers to the question of how respondents see their living standards relative to three years ago. Although there has been a slight increase in the proportion of respondents claiming better living standards now than before (to 13%), the share of those polled who feel their circumstances are now the same has shot up (from 26 to 55 percent), coupled with a

drop in the percentage of residents who feel their quality life has deteriorated (from 61 to 30 percent); see Chart 31. Obviously, this improvement in living standards is open to interpretation: is it just that more respondents believe their quality of life has at least not deteriorated, or are there actually greater numbers of those who feel they are better off, which the poll did not identify as such.

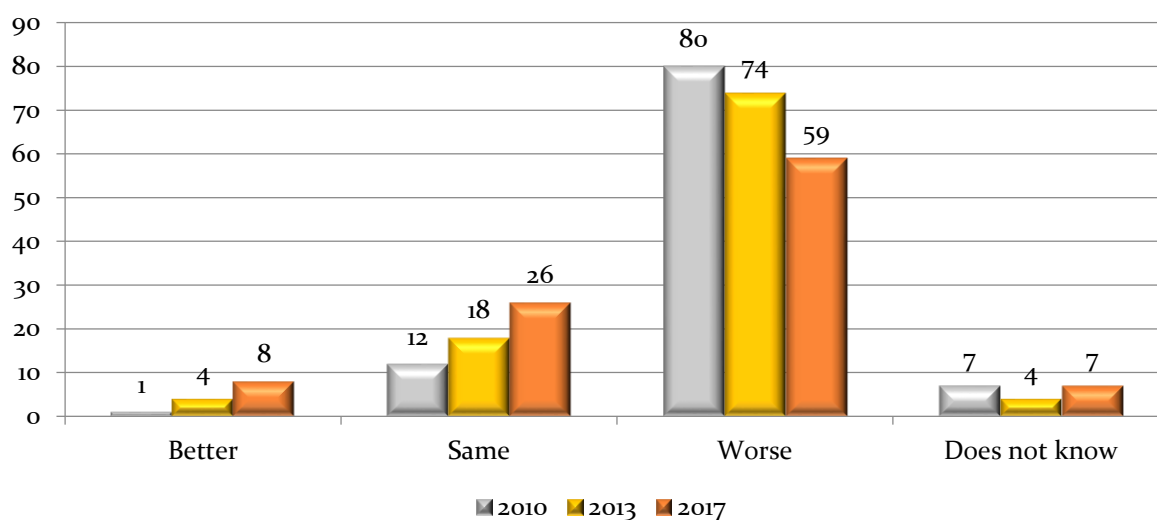
*Chart 31. When you compare how you live now with how you lived three years ago, is it better, the same, or worse?*



The number of respondents claiming their living standards are now better than they used to be is greater than the average (and stands at between 20% and a maximum of 30%) in the following communities: Tutin (29%), Surdulica (26%), Novi Pazar (24%), and Sjenica and Blace (22% each). Nevertheless, in a not insignificant number of areas the proportion of respondents who feel their living standards have deteriorated is greater than the average (i.e. higher than 40%): these are Babušnica, Knjaževac, Kuršumlija, Lebane, Medveđa, and Merošina.

Apart from the reduction in the share of respondents whose perceived living standards are 'intolerable' or worse than before, there has also been a decline in the number of residents who feel their municipality is a worse place to live than elsewhere in Serbia; see Chart 32. Interestingly, there has even been a slight increase in how many residents believe their areas are better places to live than elsewhere: this trend started at a mere 1%, only to rise to 4% in the second survey and 8% in the latest poll. At any rate, this indicates some optimism, regardless of any actual basis for it.

*Chart 32. Are living standards in your municipality better, the same as, or worse than in other Serbian municipalities?*



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