

**“Albania in the next ten years –
Politics, Economy, Society - Perceptions”**



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INTRODUCTION

Albania in the Next Ten Years marks the conclusion of a two-stage project entitled *Twenty Years After: Rethinking Democracy and the State in Albania*. The aim of the project was to gauge the perceptions of the Albanian public on the period in Albanian history commonly referred to as the ‘transition,’ as well as to understand Albanians’ expectations about the future. The data gathered by this project constitutes a valuable addition to the rich body of data gathered over the years by the Albanian Institute for International Studies through a considerable number of surveys that have, for the most part, focused on the issues of Euro-Atlantic integration, state and institution building, the implementation of democratic standards, and, to a lesser extent, on social issues and the economy. This project is distinct because it is the first attempt to offer an overview of not only the way in which the Albanian public has experienced the post-Communist transition, but also the way in which this experience has shaped their expectations for the future.

As implied by the title, *Albania in the Next Ten Years* is a survey focusing on expectations. It aims to explore the way in which Albanians see the near future of their country. The choice of ten years was not arbitrary, nor was it motivated by the understanding that, the longer the stretch of time on which respondents would be asked to give an opinion, the more their responses would move into the realm of fantasy and pure speculation. The survey is, rather, a

calculated choice since the next ten years are going to be crucial to the integration of Albania into the European Union; a development that would mark the end of the transition period as it is currently understood in the Albanian public debate. Survey after survey has shown that most Albanians believe that 2020 will most likely be the year in which Albania gains EU membership.¹

A note on the evolution of the term *transition* over the last two decades is in order at this point. One can distinguish between two different stages of the usage of this word. Initially, *transition* meant transition, i.e. the period of time marking the passage from one system to another, from an authoritarian, Communist social, political, and economic system to a democratic, free market, capitalist system. In recent years however, a serious debate has taken place in which a majority of experts on economy and politics seem to agree that it makes little sense for one to speak of *transition* any longer, at least not in the traditional sense (the paradigm that offered the analytical framework with which to explain the reality of 21st century Albania). The realities of present day Albania, according to this view, are not merely transitory, but rather have morphed into a proper system with its problems, shortcomings, achievements and successes. That said, people in Albania continue to speak about ‘the transition.’ However, this is a more figurative, arbitrary use of the term. This is a kind of transition that is defined by the success or failure of Albania’s integration process. In other words, this is a transition toward the EU that will conclude only when the country manages to gain accession to the EU.

This year Albania celebrates its 100th anniversary of independence. Out of these 100 years, more than 20 have been spent in the ‘transition mode,’ witnessing mostly controversial progress characterized by major breaking points.

Focusing on the achievements, Albania is a member the North Atlantic Treaty Organization (NATO), and is a potential candidate country to access the EU. Since the end of 2010, Albanians have been able to travel freely in most European countries, signaling

¹ AIIS: “European Perspective of Albania: Perceptions and Realities 2011”, www.aiis-albania.org

an important shift from the isolated past under communism and opening up countless possibilities for the younger generation.

However rule of law and the fight against corruption remain serious challenges. The political will and consensus needed to achieve real progress are feeble and have often failed, thereby dragging important reforms to tiring lengths and producing weak overall results. Indeed, the past three years log a political crisis that continues to develop on and off, one that has had tremendous negative influence on the country's overall democratic performance.² A number of contested problematic electoral processes, dramatic opposition protests (including a severe case that led to the tragic loss of four lives) as well as a high level of corruption scandals denounced in the media have unleashed extreme polarization in the society, and have kept the levels of intervention by the international community quite high.

With the consolidation of democratic processes and the strengthening of institutions it was expected that the role of international community in Albania would gradually be reduced. However what this study, as well as many others, shows once again is that the role of the international community is high and is expected to be high even in the future. Despite controversies that surround specific positions of different international actors and questions over efficiency and legitimacy, the international community never fails to impress and condition the behaviour of the local political class. An extreme example of this influence was made public when in the local elections of May 2011, the counting centers in Tirana resumed interrupted work only after key ambassadors showed up to follow the process.

In 2012, Albania is witness to a new political phenomenon, the emergence of new political nationalist movements and the strengthening of nationalistic rhetoric in existing parties. The Red and Black Alliance, turned into a political party, is the most evident

² The most recent Freedom House report categorizes Albania as a hybrid democracy. <http://www.freedomhouse.org/sites/default/files/Map%20of%20Regime%20Classifications%20NIT%202012.pdf>

manifestation of the new trend that will be tested for its appeal and popular strength in the elections next year.

Despite concrete progress demonstrated by macroeconomic indicators, the Albanian economy now stands threatened by the overall European economic crisis, especially by the implications of the financial crisis in Greece and the economic crisis in Italy. These two EU member states and immediate neighbours are not only Albania's key trade partners, but also host an overwhelming majority of Albanian migrants. Albania has yet to sketch its macroeconomic profile with a few key promising sectors still in need of serious investments.

The next decade will show whether Albania decides to complete the transition process, or to remain tangled up in the limbo of a hybrid regime. Whereas last year we answered the question "What is Albania like twenty year after the collapse of the communist regime?" this year we try to answer the question "What do Albanians expect for their country in the next ten years?" And as one can expect, given the confusing nature of developments in Albania, the responses given to the survey also show a level of confusion, a combination between pessimism and optimism, satisfaction and dissatisfaction, that would have been hard to understand without taking into account the rollercoaster that has been the last years of life in Albania.

EXECUTIVE SUMMARY

Albanians: mixed expectations about their future

The survey shows that a majority of Albanians do not think the country is going in the right direction. Indeed, 56 percent have a negative perception of the situation in Albania while only 34 percent have a positive outlook. The percentage of people who say that they don't know is also quite significant at 10 percent.

Despite their negative view on the overall situation of the country, respondents have more positive expectations about politics and the economy in the next ten years. Forty-eight percent believe that the political situation will improve (as opposed to 13 percent that think the opposite), while 47 percent believe the economic situation will get better (as opposed to 20 percent that believe it will deteriorate); perhaps an indication that respondents realize how inextricably the two are linked.

A considerable number of citizens believe that the status quo will hold on, with 28 percent of people expecting politics to stay the same and 23 percent expecting no changes in the economic situation of the country.

An even higher number, 52 percent, believe that the living conditions of their families will improve in the coming decade. Against these positive answers, only 9 percent are pessimistic about their living conditions in the future, while a similar 11 percent

believe that the overall economic conditions will worsen.

When talking about democracy, 42 percent of respondents believe that it will be consolidated, while a significant group, one third of the sample, believes that it will reflect the status quo.

Optimism about the economy is reflected in other responses. The 37 percent who deem the current economic crisis to be the biggest problem faced by Albania today drops to 13 percent when asked whether the economic crisis continue to constitute a problem during the next ten years. Similar optimism is revealed in answers to the questions on the situation in the education and health sectors over the next ten years with the majority answering that they will improve.

When evaluating a set of problems that the country is dealing with in the present and predicting the likelihood that they will carry the same gravity in the next decade, one issue stands out as a heavyweight constant in the citizens' answer. Twenty-one percent of those surveyed believe that corruption is the biggest challenge of Albania today, and 21 percent think it will still be the biggest challenge in the next ten years.

When considering the future there are also a number of Albanians worried about the destruction of the environment and rightful ownership of property.

Little faith in local institutions, ringing bells for justice

An unfortunately familiar result of these surveys is that Albanians do not trust their own local institutions. In fact, the most credible institution by far in their view is the international community, in which 30 percent of the respondents have a lot of faith and another 37 percent have some faith. The media is the second trustworthiest institution. Some 18 percent have a lot of faith in it, and a further 45 percent have some faith.

Perhaps unsurprisingly the institutions that have fared the worst are the courts and the Attorney General. Thirty percent of people

have some faith in the courts while 64 percent have very little or none. The Attorney General scores just a bit better with around 40 percent displaying trust and 54 percent saying they have little or no trust in this institution. Survey after survey in recent years has revealed that Albanians view their justice system, and especially the courts, as the most corrupt institutions in the country. These results confirm the same troubling reality that needs to be changed in order for the much advocated for judicial reform to be fully successful.

It is also unsurprising that the traditional political parties, such as the Democratic and Socialist parties, also score quite low; a result that hints at the exhaustion of the Albanian public with the prolonged period of political conflict. Only a third of respondents say that they trust these two main political parties, while an average of 60 percent of people are disillusioned with them. One can say that there is a certain degree of exhaustion with politics, which is also reflected in the low levels of credibility towards the main parties as revealed here.

The percentage that has little or no faith in institutions such as the prime minister, government, or political parties outweigh the percentage of those who have a lot of faith or some faith in the same institutions. Only the President, army and media buck this trend, with more than half of the total sample saying they do have faith in them, while civil society and the police follow close behind. There is a considerable percentage of respondents, a full quarter of the sample, who claim to have faith in the Red and Black Alliance, a newly created, nationalist party that has made of the criticism of the traditional way of doing politics the central theme of its political rhetoric

Respondents rightly assign a greater weight and responsibility to the government, parliament and prime minister for the future of the country. However, in yet another illustration of how sensitive the issue of the justice system has become to ordinary Albanians, we witness a show of maturity of the Albanian public opinion that finally seems to have realized that a functioning justice system is indispensable to the future of Albania as a European democracy. Hence, the respondents identify the courts as one of the most

important institutions for the future of Albania: just as important as parliament and the government, and more important than the prime minister.

However, if one considers the answers to this question in combination with the evaluation done for the future role of the international community one can also detect a note of resignation when it comes to the ability of the Albanian institutions to deliver. Once again the international community is judged by 76 percent of the respondents to be just as important as the highest institutions of the state to the development of the country. In what must be a vote of rejection, the two main parties, the Socialists and the Democrats, are seen as only partially by the public as important to their future. The media on the other hand is rightly seen as a very important actor by almost 80 percent.

When it comes to the basic social services, people seem to be optimistic or at least hopeful for the future in their responses. Hence 55 percent of those questioned said the quality of healthcare services will improve in the future, while 38 percent believe it will either stay the same or even worsen. When it comes to education the optimism is a bit paler with 49 percent expecting it to improve and 45 percent saying that it will remain the same or even worsen. There is an important difference to be made here between the two. The number of people who believe that the quality of education will be worse in the future is double that of those who think the same about healthcare, signaling growing discontent with the situation in the education system in the country.

Albanians believe that they have unequal access to justice, a conclusion with important social repercussions and that should be treated very seriously by decision makers. A vast majority, 83 percent, believes that there are people in Albania who are above the law. When questioned further on this issue, respondents clearly identified politics as the main reason for this situation. The single biggest group with 45 percent believes politicians are above the law, 18 percent identify “people with the right connections” as being

above the law, while a further 12 percent reply that rich people are above the law.

Property issues in Albania are one of the priority issues to be addressed as recommended by the European Commission. Indeed property issues have profound implications on justice, investment, and aggregate wellbeing. Forty-five percent of Albanians are not satisfied at all with the way these issues have been handled, a fact that might hint at the root of being distrustful to the justice system as well. An additional 28 percent are also not satisfied, while only 14 percent seem to be satisfied with it. Thirteen percent do not know or have not had any direct contact with this issue hence find it hard to answer.

Almost 30 percent believe that the biggest problem in Albanian politics is the quest for absolute power or for the centralization of power in one's hands, while another 21 percent think it is the political conflict between the main camps. Considerable groups of people, around 14 percent each, think that the lack of free elections and the current party leaders are the biggest problem. Eleven percent think that the problem is that constant leadership hence a lack of novelty in the names and characters of leaders.

Vulnerable health of democracy

In the area of democracy, the results of the survey make for somber reading. Sixteen percent say that Albania is a totally undemocratic country as opposed to 11 percent who believe it to be fully democratic. The percentages that think that it is more democratic than undemocratic and vice versa are almost identical, with respectively 32 and 33 percent. Even though the fact that almost half the respondents do not have a positive view of the levels of democracy in Albania is worrisome itself, the situation becomes all the more disturbing if one considers that these figures represent a serious deterioration from the results of the previous survey. Thus in 2011, only 6.5 percent said that the country is fully undemocratic,

56.7 percent that it is more democratic than undemocratic, and 22.8 percent that it is fully democratic.

When asked about the actors that have played the greatest role in the consolidation of democracy, the responses can once again be seen as a reflection on the Albanian political class and institutions. The biggest group, with 30 percent, identifies the international community as the greatest contributor, with the second group following close behind with some 26 percent giving credit to Albanian citizens. By comparison, only 10 percent believe that the government or political leadership deserve the merit for the consolidation of Albanian democracy.

Despite their pessimism about the current levels of democracy in Albania, respondents have a more positive outlook as far as the coming decade is concerned. Thus 42 percent, the biggest group, believe that it will consolidate. However, the second biggest group with 33 percent believes it will stay the same, which, in light of the abovementioned data on the perception of the levels of democracy, can hardly be interpreted as a positive judgment.

The results of the data offered about the perceived present and future role of the international community make for a very interesting read. Albanians have a steady opinion about the role of this community as a determinant in the political life of their country. Forty percent of respondents believe that the international community plays a very important role, followed by another 40 percent who believe its role is important. Only 16 percent think that this role is little or inexistent. The evaluation changes little when one considers the future. One third of the citizens think the international community will play a very important role in the next ten years, 42 percent think it will play an important role, and only 17 percent think its role will be little or irrelevant.

Considering that media is one of the strong pillars of democracy, it is worrying that 54 percent of respondents identify media as not credible or little credible, against 44 percent who say it is credible and very credible.

Only 42 percent of citizens believe that in the next ten years there will be free and fair elections in Albania, with 35 percent saying that this will not be the case and a large group, 23 percent, saying that they don't know. Citizens seem to be rather confused and pessimistic about elections despite their optimism related to the democratic consolidation of the country.

The economy: feeling the crisis

There is very considerable dissatisfaction with the current economic situation. Only 25 percent claim to be satisfied with their economic situation, against 39 percent who feel little satisfaction and 32 percent who are not satisfied at all with the situation.

The figures become even more negative when respondents compare their current situation with that of the previous year. Only 12 percent feel that their situation has improved, as opposed to 44 percent that believe their situation has become worse or much worse.

Data reveals that citizens have a very interlinked perception when it comes to their personal economic situation versus overall economic situation and do not separate the two. Hence the 47 percent in both cases believe that the personal economic situation and the overall economic situation will likely improve in the next ten years. The percentages of those who think that both will stay the same are very similar (24 and 26 percent) and the same is true for those who think they will worsen (12 and 11 percent).

Despite their optimism about the future, 58 percent would still leave Albania and emigrate elsewhere if they had the chance. Thirty-five percent say that they would not leave, while 7 percent don't know.

The reasons given for the emigration choice are mostly economy-related; however, a large group of the 35 percent of those that answered that they wish to leave did not identify the exact reason or had a combination of reasons. Twenty-two percent of those surveyed mention that they think their children's future has less potential in

Albania, and 20 percent mentioned their difficult living conditions. Ten percent say that they cannot make money in Albania.

The future and EU: high hopes

The majority of citizens, 55 percent say that they believe there is either a 100 percent or a very high possibility that Albania will join the European Union in the next ten years, with 23 percent responding that there is some chance. Only 17 percent think that there is little or no chance of this happening.

International relations: same friends, same foes

It comes as no surprise that an overwhelming majority of respondents, 72 percent identify the United States as the country that has exerted the greatest influence on Albanian governments over the past 20 years – a widely held belief reflected not only in surveys but also in editorials and debates in the media. However, only 35 percent believe that the US will continue to play the same role in the coming decade. Instead, the single biggest group, with 43 percent, believes that that role will be taken over by the EU. This decline of the importance of the US in Albanian affairs is also apparent in responses to the question about the strategic importance of various countries. Not only is the EU seen as being strategically more important to Albania now – 53 percent for the EU versus 30 percent for the US – but also the difference grows considerably when respondents are asked about the coming decade – 59 percent for the EU versus 22 percent for the US. The reason for the decline in importance of the US as compared to the EU is easier to identify given the desire of most Albanians to join the European Union.

A country, which is viewed positively and with which respondents believe Albania should increase regional cooperation,

is Turkey, whose economic and diplomatic presence has increased significantly over the past years. Fifty-eight percent of respondents believe that a lot of attention and importance should be vested with the process of collaborating with Turkey.

Respondents have been very traditional in the pointing out of threats: 23 percent have identified more Greece and Serbia as the greatest threat to the country's security. However, these results mark a significant decline compared to 2011 when respectively 51.6 and 47.9 percent of respondents saw Serbia and Greece as the greatest threats. Still, despite the reduction of the threat perception, there is no great desire on the part of respondents to invest in regional cooperation with these two countries.

Kosovo: rising support for unification

Relations with Kosovo are viewed by respondents as far more important than with any other country in the region.

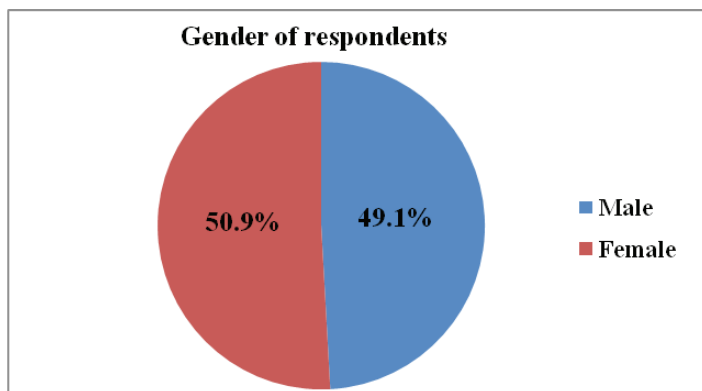
Responses reveal that support for unification with Kosovo has grown considerably since 2011. Thus 62 percent would vote in favor of unification in a hypothetical referendum, as opposed to 39 percent in the 2011 survey. Furthermore, 59 percent believe that unification would be positive; a figure that marks a dramatic change when compared with 2011 when only 9 percent responded in the same manner.

FINDINGS AND ANALYSIS

Sample description

The sample was almost equally representative of males and females. Thus 49.1 percent of the respondents were males, while 50.9 percent were females (*see Table 1*).

Table 1. Gender representation



The single largest age group in the sample was 18 to 29 years of age, representing 32.2 percent of the total; 20.2 percent belonged to the 30 to 39 group; 21.7 percent were of 40 to 49 years of age. Of the remainder, 20.4 percent were of 50 to 69 years of age, and only 5.5 were older than 70. Generally speaking, the age distribution of the

sample seems to represent what is thought to be the age distribution of the Albanian population as a whole (see Table 2).

Table 2. Age distribution of sample

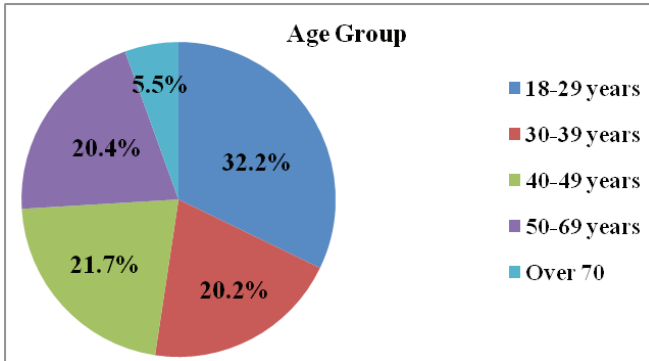
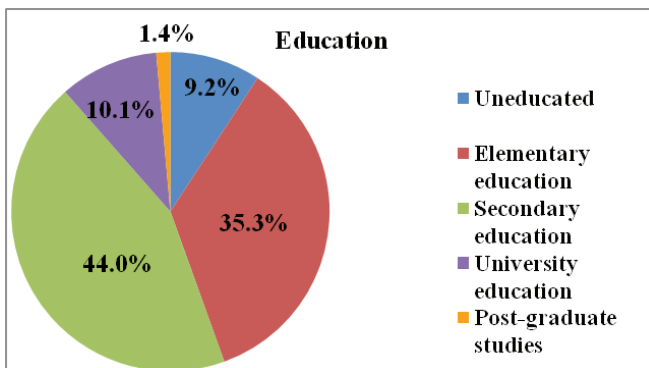


Table 3 illustrates the composition of the sample in terms of level of education being completed. Hence, 10.1 percent of the respondents have university education, as opposed to 35.3 percent with elementary education and only 1.4 percent has conducted post-graduate studies. A further 44 percent, by far the largest group, have completed secondary education.

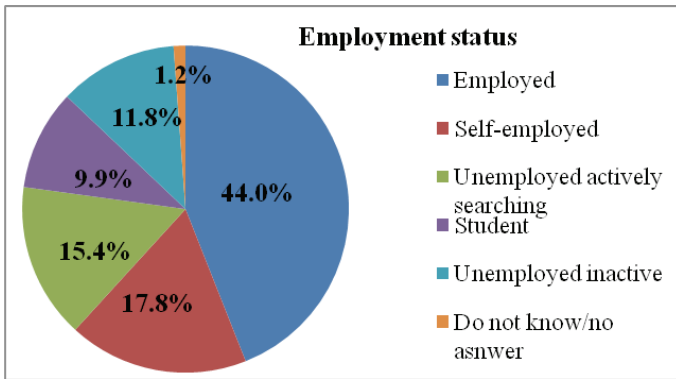
Table 3. Education levels of sample



In terms of employment the single largest group, with 44 percent, is

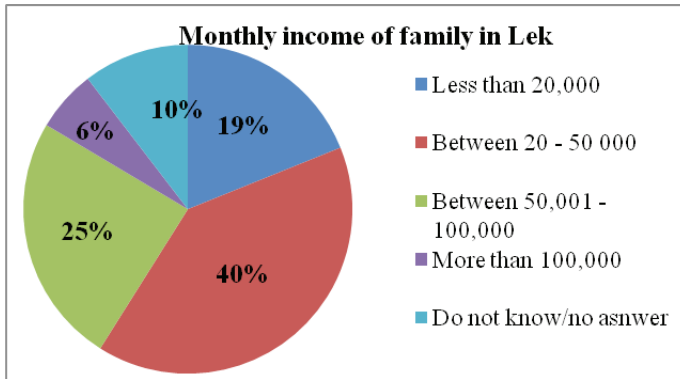
employed followed by 17.8 percent who are self-employed. Furthermore, 9.9 percent are still studying while 15.4 percent are unemployed but actively searching for a job, while 11.8 percent are unemployed and not searching for a job (see Table 4). There has traditionally been difficulty in Albania defining ‘self-employed’ when applied to people living in rural areas. Official data only counts ‘self-employed’ as all those Albanians, living in rural areas who possess a plot land, regardless of the fact whether they are working their land or not.

Table 4. Distribution by employment



When it comes to income, by far the largest group, with 40 percent of the total, falls in the 20 000 to 50 000 Lek per family per month, while 19 percent of families report income of less than 20 000 Lek per month (roughly 150 Euros). The majority of the sample can be categorized as below the average monthly income claimed by INSTAT after the last population census, which stands at 900 US dollars per family per month.

Table 5. Distribution by income



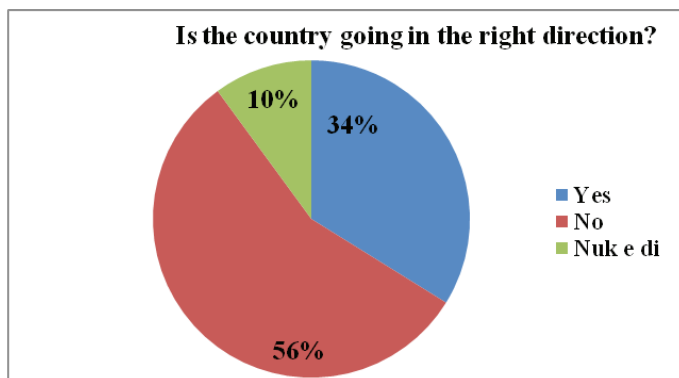
General questions

The key result of this survey is that the majority of Albanians, 56 percent of the respondents, do not think that the country is moving in the right direction. Economic issues and perspectives on the political situation on the ground seem to be the combined reasons behind this overall negative evaluation of the trend of developments in Albania. The fact that since 2009 the country has been mired in a seemingly intractable political crisis that has exerted its influence on all aspects of Albanian life has also influenced this perception. Feeble economic conditions, ever-present concerns about the rule of law, security, and EU integration have played a part too. Nevertheless, 34 percent of the sample believes that Albania is going in the right direction, while a considerable 10 percent has no opinion (see Table 6).

The percentages of those who believe the country is not going in the right direction are much higher for the 18 to 25 year old range and those over 70 years of age, with 66 and 67 percent, respectively. One possible explanation is that these age groups are also very vulnerable to conditions related to economic problems such as unemployment or pension level as compared to living standards. Similarly, the percentages of those who have a negative opinion on this question are far higher for those belonging to both unemployed categories, standing at 75 for those actively searching for a job, and 70 for those who are resigned to their status as unemployed. The highest percentage of those who believe the country is not going

in the right direction however, belongs to the group with family income below 20 000 Lek per month, with 78 percent.

Table 6. Is the country going in the right direction?

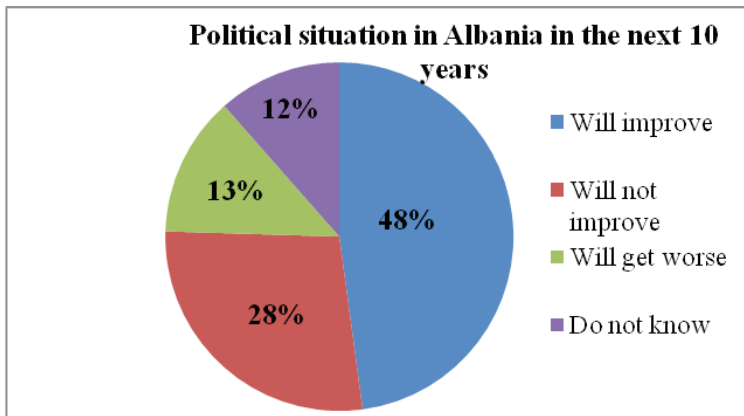


Despite their pessimism on the direction in which Albania is moving, and the political conflict between government and opposition, the single largest group of respondents, or 48 percent of the total, believes the situation will improve in the next ten years. With that said, 28 percent of the respondents believe that the situation will remain the same with 13 percent believing it will get worse (see Table 7). There are no significant differences according to age, education or income groups.

Table 7. Political situation in Albania in the next 10 years

As Table 8 shows, the percentage of those who believe the economy will get better in the next ten years, standing at 47 percent, is almost equal to those who believe that the political situation will get better. The percentage of those who believe it will stay the same stands at 23 percent, but one fifth of the respondents believe that the economic situation will get worse.

The Albanian economy has been affected by the overall financial and economic crisis in Europe. Since the crisis has been particularly

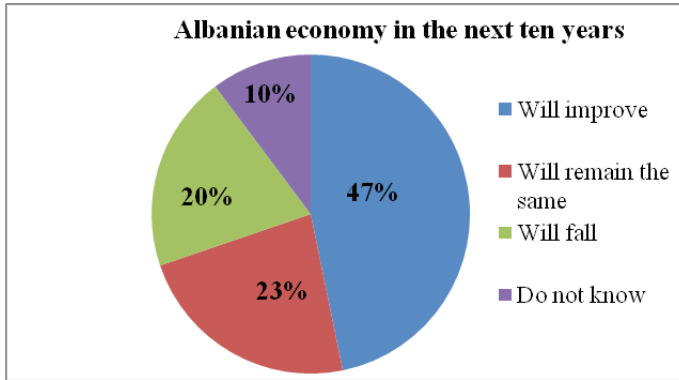


strong in Greece and Italy, Albania's main trade partners and main immigrant host countries, the implications for Albania have also been more direct. The rate of growth of the Albanian economy has slowed considerably and international financial institutions have also called for caution in administering public debt.

One factor that may account for this optimism in a context of a slowing economy may well have to do with the age of the respondents. In fact, the young age of the population of Albania (as well as Kosovo) is often used as an argument to explain the seemingly unjustified levels of optimism shown by Albanians in survey after survey despite the difficult economic conditions many of them still experience. One more important factor is that in general when answering this question it is hard to discern an objective estimation from the natural hope that people carry for the future. Hence, in expressing their optimism, citizens might as well be expressing their personal desire that such will be the case more than a rational evaluation concerning the future economic prospects.

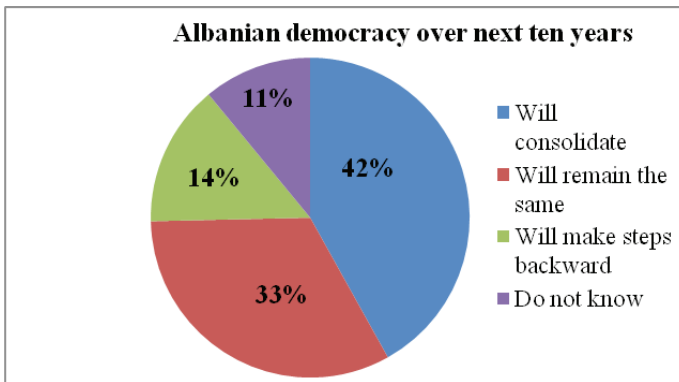
While the differences of opinion across age and income groups and employment status are negligible, the only difference is with those with income of less than 20 000 Lek who are far less optimistic than the rest with only 25 percent believing things will get better.

Table 8. Albanian economy in the next ten years



When asked about their expectations for Albanian democracy, the levels of optimism dropped significantly. Only 42 percent expect it will consolidate in the coming decade, while 33 percent believe it will stay the same. Judging from the answers given to some of the later questions in the survey, one can safely claim that at least for a considerable percentage of the will-stay-the-same category, this is in fact a negative judgment. A further 14 percent on the other hand believe it will get worse (see Table 9).

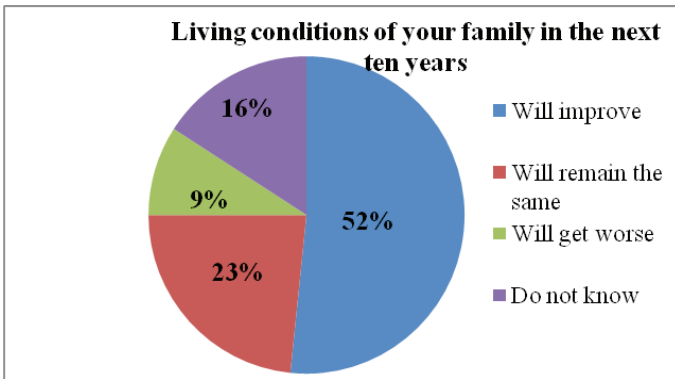
Table 9. Albanian democracy in the next ten years



Respondents were at their most optimistic when asked about the

living conditions of their own families in the next ten years. Fifty-two percent of them believe that things will get better for them and their families, as opposed to 9 percent who believe the opposite. Twenty-three percent believe they will stay the same (see Table 10). As far as this question is concerned and the high level of optimism displayed by the answers, the fact that it is a very personal question influenced by the personal hope that one's family will do better. A significant 16 percent doesn't know or cannot make an estimate.

Table 10. Living conditions of your family in the next ten years



When asked to rank the biggest problem they face today, the single largest percentage of the respondents, representing 37 percent of the sample, chose the economy, followed by corruption with 21 percent. However, only 13 percent believe that the economy will continue to be a problem, while the percentage of those who believe that corruption will continue to be a problem remains identical at 21 percent, perhaps a reflection of the fact that Albanians have lost faith in the ability of their governments and political class to fight corruption. It is also interesting to note that the percentage of those who see the destruction of the environment as a problem in the next ten years increases to 9 percent from 3 percent of those who see it as a problem today; indicating that the Albanian public is becoming more aware of the damage that is being inflicted on

the environment. It is interesting too to see what a small percentage of the respondents (only 5 percent) see the lack of free and fair elections as a big problem, especially since most political conflicts over the years can trace their origins in the contestation of elections (see Table 11). This might be explained with the timing of the survey that does not coincide with any important electoral year.

Table 11. The biggest problem Albanians face today and the biggest problem they will face in the next ten years

	Today	Next ten years
Economic crisis	37%	13%
Lack of hope for the future	10%	9%
Corruption	21%	21%
Lack of free and fair elections	5%	5%
Low level of implementation of law	8%	10%
Quality of education	2%	4%
Quality of health service	2%	2%
Destruction of the environment	3%	9%
Political conflict	4%	5%
Property issue	4%	7%
High levels of criminality	1%	2%
Other	1%	0%
Do not know	3%	11%
Total	100%	100%

State and governance

The main result from Table 12 is that Albanians do not really trust Albanian institutions, a troubling reality being reflected year after year in many polls of the public opinion.

In fact, the most credible institution by far in their view is the international community, in which 30 percent of the respondents have a lot of faith and another 37 percent have some faith. The media is the second trustworthiest institution. Some 18 percent have a lot of faith in it, and a further 45 percent have some faith.

Fifty-three percent of the respondents have some or a lot of faith in the institution of the President while only 40 percent reports the same about the government. The difference between the two institutions when it comes to those reporting no trust at all is also significant. While only 16 percent say that they hold no trust for the President a solid 31 percent say that they don't trust the current government at all.

Thirty-six percent of the people trust a lot or at some degree the Prime Minister, while 21 percent has little trust. Almost a quarter of the sample, 23 percent, has zero trust in the Prime Minister.

Perhaps unsurprisingly, the institutions that have fared the worst are the courts and the Attorney General. Fifty-four percent of the respondents say that they have little or no faith in the Attorney General, while one-third reports to have some

faith. Sixty-four percent of respondents are skeptical of the courts, and only one fourth of the respondents report some faith. Survey after survey in recent years has revealed that Albanians view their justice system, and especially the courts, as the most corrupt institutions in the country.

The institution of the Army enjoys a good level of credibility and there are signs that the police is being rehabilitated in the eyes of the public opinion with almost half of respondents reporting to have a level of trust in it, and only 17 percent reporting to have no trust at all.

It is also unsurprising that the traditional political parties, such as the Democratic and Socialist parties, score so low. Thirty-six percent of respondents say that they have full or partial faith in the majority party (the Democratic Party), while a slightly lower figure of 30 percent report the same degree of faith in the opposition leading party (the Socialist Party).

In recent years ordinary people as well as experts have started speaking out against the traditional political parties and accusing them of being more interested in their quest for power than in addressing the problems of the public. One can say that there is a certain degree of exhaustion with politics, which is also reflected in the low levels of credibility towards the main parties as revealed here. The score received by the Red and Black Alliance also seems to confirm this interpretation. This newly created, nationalist force, is calling on people – especially young people – to join it as an alternative to the old, decayed political system represented by the traditional heavyweights of the Albanian party system.

Half of the respondents trust the civil society in the country while only 16 percent of them say that do not trust CSOs at all. Civil society faces challenges in having a solid impact on public policy, and the European Commission issued progress reports have called on the government to include more civil society consultations in its legislation making and decision making processes.

Table 12. How much faith do you have in the following institutions?

	A lot	Some	Little	None	Do not know
President	18%	35%	27%	16%	4%
Government	13%	27%	27%	31%	3%
Prime Minister	18%	18%	21%	23%	34%
Courts	8%	24%	33%	31%	4%
Attorney General	7%	33%	33%	21%	7%
Police	13%	36%	29%	17%	4%
Army	20%	37%	27%	15%	0%
Civil Society	13%	36%	28%	16%	7%
Democratic Party	16%	20%	22%	37%	6%
Red and Black Alliance	10%	16%	24%	37%	13%
Socialist Party	11%	19%	25%	39%	6%
Media	18%	45%	19%	13%	4%
International Community	30%	37%	17%	10%	6%

At a first glance the results in Table 13 contain no unexpected results. Respondents rightly assign a greater weight and responsibility to the government, parliament and Prime Minister for the future of the country. Fifty-two percent say that the parliament is very important, 51 percent agree that the government is very important and 47 percent say that the Prime Minister's office is very important for the future of the country.

However, here we find another illustration of how sensitive the issue of the justice system has become to ordinary Albanians, and a show of maturity of the Albanian public opinion that finally seems to have realized that a functioning justice system is indispensable to the future of Albania as a European democracy. Fifty-one percent of the respondents identify the courts as one of the most important

institutions for the future of Albania: just as important as parliament and the government, and more important than the Prime Minister.

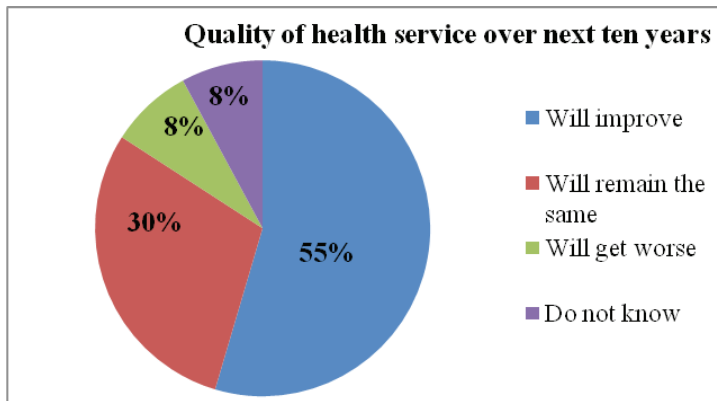
Considering the answers to this question in combination with those in Table 12, one can also detect a note of resignation when it comes to the ability of the Albanian institutions to deliver. Once again the international community is judged by respondents to be just as important as the highest institutions of the state to the development of the country. In what must be a vote of rejection, the public does not see the two main parties, the Democratic and Socialist parties, as important to their future. The media on the other hand is seen as a very important actor (see Table 13). One third of the respondents also say that civil society is very important for the future and 37 percent identify it as an important factor for the next years in Albania.

Table 13. On a scale of 1 to 4 evaluate the importance of the following institutions to the future of Albania

	Very important	Important	Rather important	Not that important	Not important at all	Do not know
President	33%	38%	18%	3%	6%	3%
Government	51%	33%	9%	1%	4%	2%
Parliament	52%	30%	9%	2%	5%	3%
Prime Minister	47%	32%	12%	2%	5%	3%
Courts	51%	30%	10%	1%	4%	3%
Attorney General	38%	39%	13%	2%	4%	4%
Police	43%	33%	16%	2%	2%	4%
Army	22%	37%	28%	5%	4%	4%
Civil Society	29%	37%	20%	2%	6%	5%
Democratic Party	20%	28%	24%	5%	18%	5%
Socialist Party	15%	27%	27%	7%	20%	6%
Media	40%	39%	12%	2%	3%	4%
International Community	46%	30%	12%	3%	4%	5%

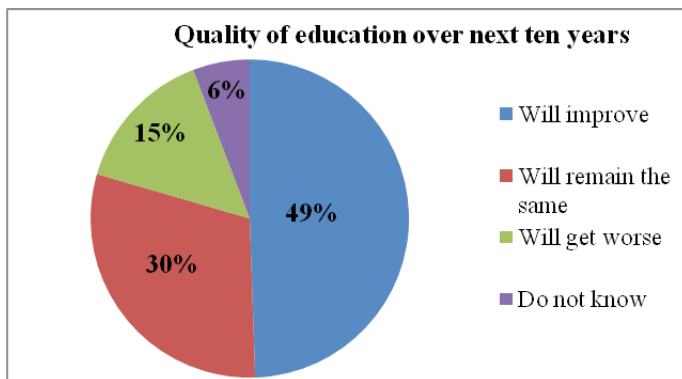
A majority of respondents, 55 percent, seem to believe that the health system will improve in the next ten years. In fact, currently the health system is in such a desperate state, that one is tempted to think that instead of optimism, the response to this question is motivated more by a cynical it-cannot-get-any-worse resignation. Furthermore, surveys show that next to the courts, health services are seen as the most corrupt sector of the Albanian state. It is also interesting to note at this point, that in the first stage of the project (*Twenty Years After: People on State and Democracy*) the general view of the respondents was that health service was of far better quality during Communism; one of the areas of life in dictatorship that is remembered with some nostalgia by Albanians.

Table 14. Quality of health services in the next ten years



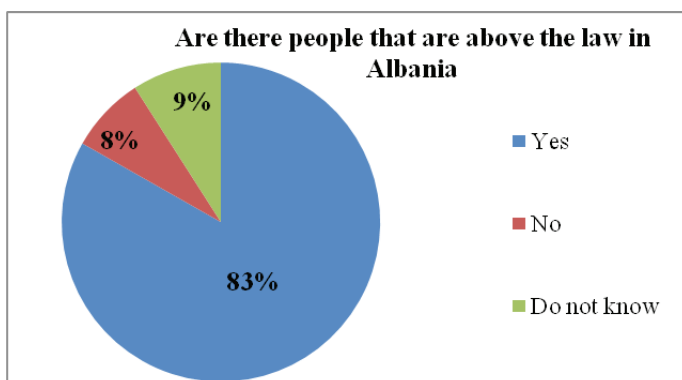
When it comes to the education system the respondents show a more moderate optimism than on the health service. Forty-nine percent believe that it will improve, but 15 percent think that it will get worse, while 30 percent believe that nothing will change.

Table 15. Quality of education services in next ten years



The results in Table 16 constitute perhaps one of the most damning indictments of the situation of the rule of law in Albania. A striking 83 percent of respondents believe that certain people in their country are above the law; a very high increase from 2011 when only 28 percent of respondents fully agreed with the statement. In fact, given this overwhelming response one can easily understand why the respondents have so little faith in the court system.

Table 16. Are there people in Albania that are above the law?



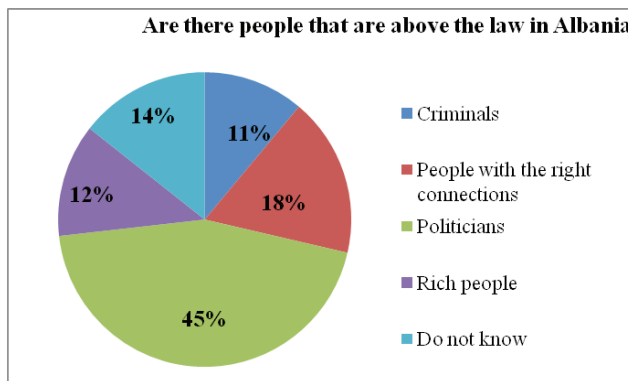
As Table 17 shows, the single biggest group of respondents, 45 percent, identify politicians as being above the law, while a further

18 percent identify the so-called people with the right connections as being beyond the reach of the law. Twelve percent of the people think rich people are above the law comparable to 11 percent that hold criminals to be above the law in Albania.

The experience of 22 years of transition has entrenched the perception that it is politics that stands at the root of this system of impunity that has been installed in Albania.

In 22 years, countless corruption affairs have been exposed in which politicians were directly involved, but one would be hard pressed to find even one case of a high ranking politician ending up in jail for his or her involvement. Even in those rare instances when the cases against ministers or members of parliament have actually made it to court, the cases have invariably been closed either on technicalities, or with the acquittal of the defendants despite the evidence brought against them. Although the way in which the question regarding those who are above the law was framed in the 2011 survey does not allow for a direct comparison, it is clear from the results that in 2011 too there was almost unanimous agreement between respondents that politicians are above the law.

Table 17. Are there people in Albania that are above the law?



The problem with property in Albania is yet another issue that reflects on the rule of law and the courts. Although a difficult issue

to solve to begin with, it has been compounded by governmental and judicial corruption, and it is hard to see how it can ever receive a satisfactory solution despite the fact that progress in the resolving of this issue is closely monitored also by Brussels, and conditions Albania's progress in the integration path. Not surprisingly, 45 percent of respondents are not satisfied at all with the way this problem has been handled, while a further 28 percent are not very satisfied. Thirteen percent of respondents did not give any answer or said that they don't know, signaling the level of confusion associated with the issue in general. Only 11 percent of the people are satisfied with the way it has been managed and the level of those very satisfied is statistically not relevant.

Table 18. Level of satisfaction with solution to the property question during these 20 years

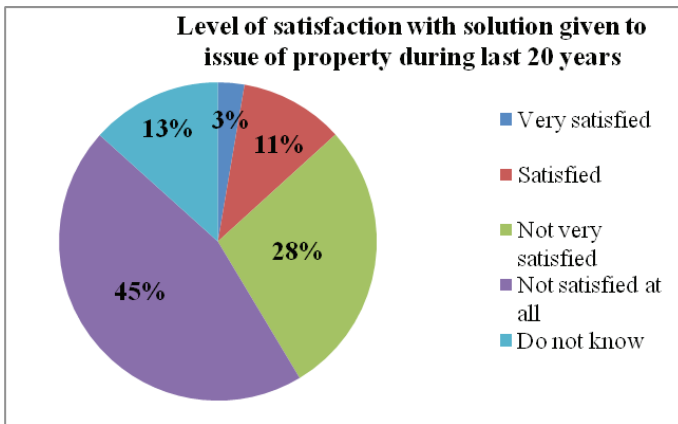
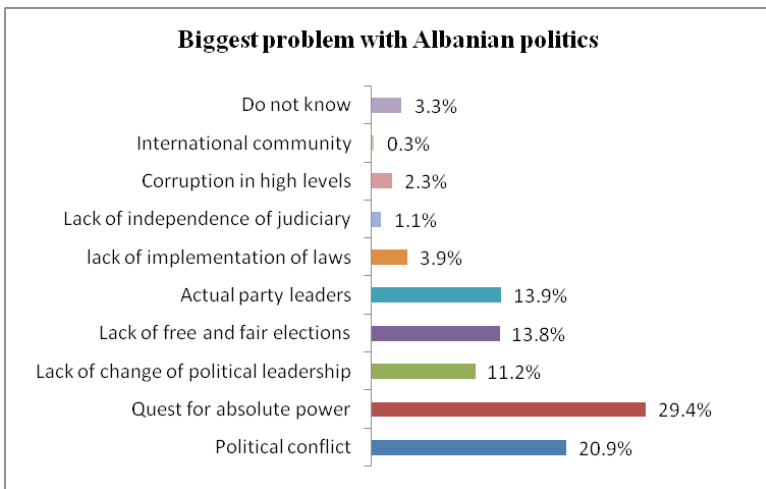


Table 19 clearly shows that respondents have a well-justified perception about the problem with Albanian politics during the transition as a whole, but especially during the last years, which have been marred by a very serious political conflict. Of the respondents, 29.4 percent, the biggest group, identify the quest for absolute power as the biggest problem, followed by 20.9 percent who see the fierce political conflict as the main problem. In line with the

cynicism shown vis-à-vis the traditional parties in the previous question, 13.9 percent see the actual leaders of the political parties as a problem, with a further 11.2 percent holding a similar view by judging that the failure to change the leadership of the parties is the biggest problem. A further 13.8 percent believe that the lack of free and fair elections is the biggest problem; a rather small percentage considering the fact that most of the political conflict since 2009 has revolved around the issue of the elections.

Table 19. Biggest problem with Albanian politics

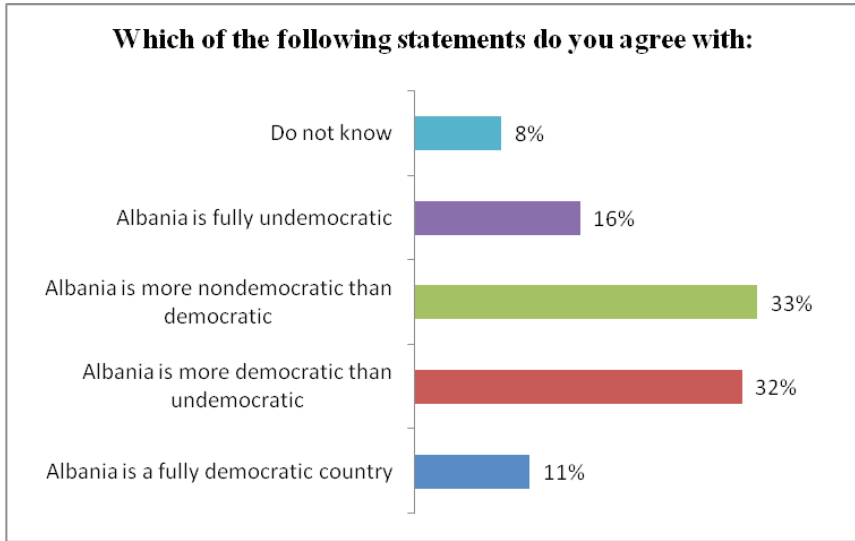


DEMOCRACY

As Table 20 shows, respondents have a negative view of the levels of democracy in Albania. 16 percent believes that Albania is fully undemocratic, as opposed to another extreme 11 percent that believes it to be fully democratic. Thirty-three percent, however believe that their country is more undemocratic than democratic, with an additional 32 percent believing it to be more democratic than undemocratic.

On the whole, these responses paint a very somber picture for a country that parted ways with an authoritarian Communist regime 22 years ago, that has gained NATO membership, and hopes to join the EU in the near future. Furthermore, one has to underline the fact that when compared to the 2011 survey (the first stage of the project) the scores of this year make for far more pessimistic reading. Only 6.5 percent responded that Albania is fully non-democratic in 2011 as compared to 16 percent in 2012. Furthermore, in 2011 56.7 percent believed Albania was more democratic than non-democratic, but in 2012 this percentage has fallen to 32 percent. Those who believe that Albania is more non-democratic than democratic on the other hand have increased from 14 percent in 2011 to 33 percent in 2012, while the percentage of those who believe it to be fully democratic has halved, from 22.8 percent to 11 percent in 2012.

Table 20. How democratic is Albania?



As illustrated in Table 21, the largest group of citizens, 30 percent, believes that the most important promoter of democracy has been the international community, followed by the second largest group, with 26 percent, that believes the country's citizens have been the most important factor. The government and political leadership received only 10 percent each; yet another indication of the negative perception Albanians have on their political and governance system.

Only 5 percent of the respondents believe that civil society has been the key promoter of democracy. The result received by the media, for which 7 percent of respondents identify it as a key promoter, is rather surprising given the fact that in previous replies respondents attached a far greater importance to the media as a factor in Albania's development. It is interesting to note that although the international community continues to be seen as the single most important factor that has contributed to the consolidation of democracy in Albania, the score received in 2012 with 30 percent is far lower than that received in 2011, which stood at 49 percent.

Table 21. Which of the following actors has played a more important role in the consolidation of democracy in Albania?

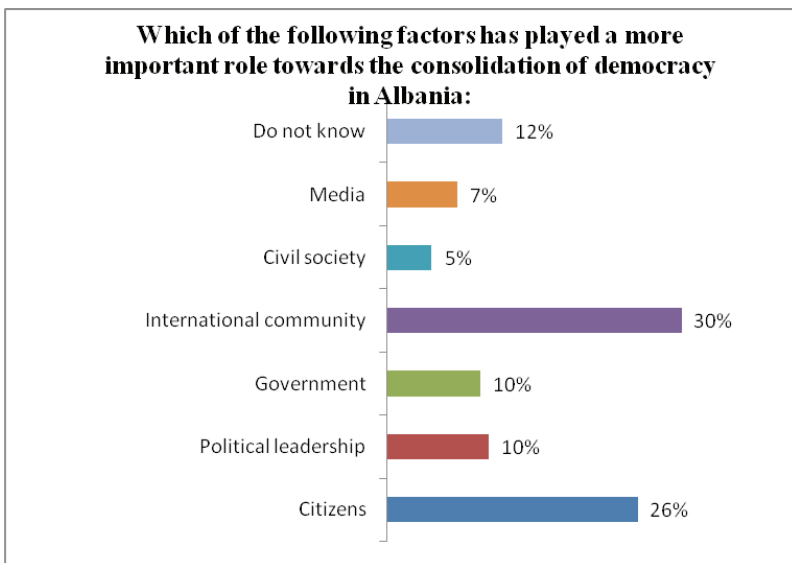
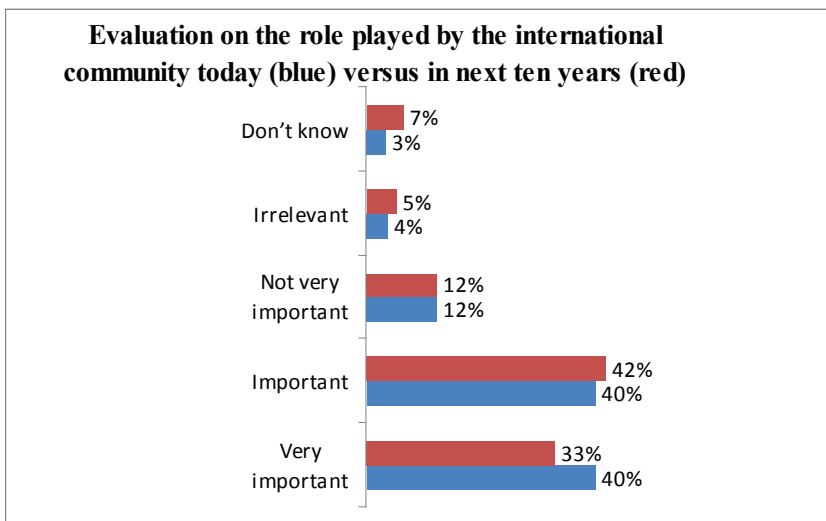


Table 22 reinforces the fact that in the eyes of the Albanian public the international community is a very important factor in developments taking place in their country, and that it shall continue to be so even in the next decade. Eighty percent believe it plays a very important or important role as opposed to a mere 4 percent who do not assign it any importance. In their considerations for the future Albanians modify slightly their evaluation with a 5 percent decrease in the total number of those who believe it will carry on a very important or important role. Hence, 33 percent of respondents believe it shall still retain a very important role, while 42 percent think it will be an important role. There is a minor increase in these that don't know the answer for the future.

Table 22. Your judgment on the role played by the international community today (blue) and in the future (red)



Results in Table 23 are perhaps an explanation for the insignificant importance attached by respondents to the media as an actor in the consolidation of democracy. Only 6 percent have a lot of faith in Albanian media, with a further 38 percent answering that they are merely credible. However, a majority of respondents believe that they are not credible (44 percent) and not credible at all (10 percent). The respondents' skepticism vis-à-vis the media may be influenced by the strong perception that, though not all, Albanian media are controlled by powerful business and political interests, a perception often supported by international reports.

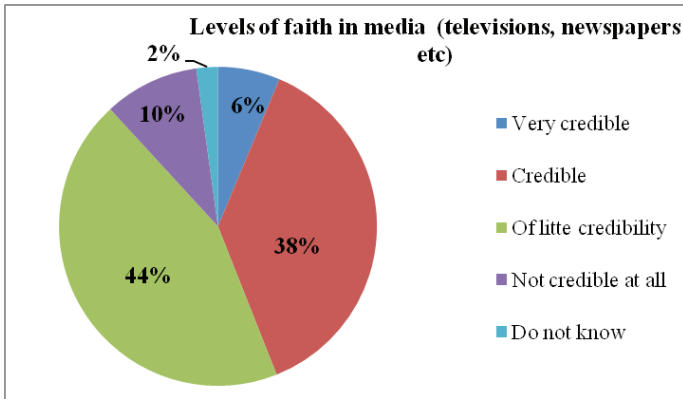


Table 23. Level of trust in Albanian media

Table 24 reflects pessimism for the future of Albania as envisaged by the respondents. Only 42 percent believe that free and fair elections will be held in their country in the next ten years; a worryingly low level of optimism, for a country that hopes to gain EU membership in the next ten years. Thirty-five percent answered that they think free and fair elections will be one of the problems with Albanian democracy in the next ten years. A large number of respondents, 23 percent, didn't answer, or said "I don't know" to this question, signaling confusion and lack of a clear picture for the political future of the country.

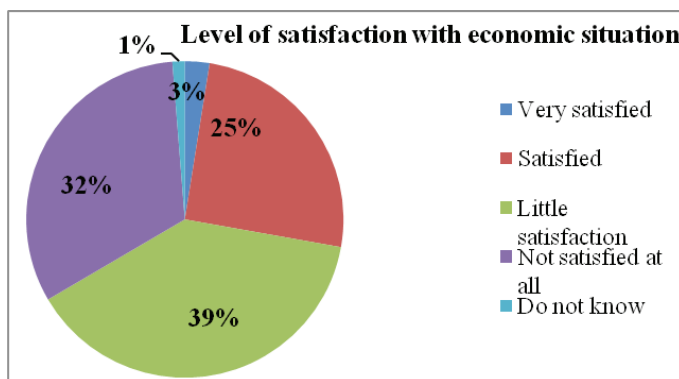
Table 24. Do you believe that there will be free and fair elections in Albania in the next ten years?

	Number	%
Yes	500	42%
No	417	35%
Don't know	274	23%
Total	1191	100%

The economy

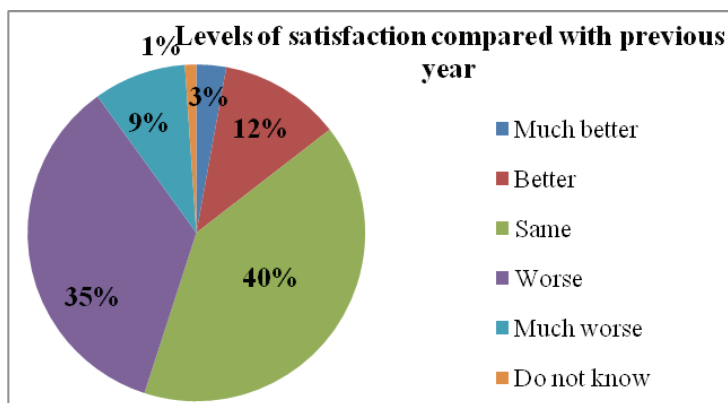
The majority of Albanian citizens show little or no satisfaction at all with the general situation of the Albanian economy. Thirty-nine percent feel little satisfaction while 32 percent are not satisfied at all. Only 25 percent say they are satisfied while another statistically dubious 3 percent are very satisfied. The level of the economy has been affected by slow growth and implications from the crisis in neighboring countries hence affecting the overall evaluation of citizens over it.

Table 25. Level of satisfaction with economic situation



Results in the Table 25 indicate that besides not being satisfied with the economic situation, there is in fact a growing dissatisfaction with it. Thirty-five percent of respondents think that the situation is worse than it was one year ago and a further 9 percent think that it is much worse as compared to a mere 15 percent who believe the situation has improved (again 3 percent) or much more improved (12 percent). The results seem to reflect the fact that the public is starting to feel the consequences of the economic slowdown of recent years.

Table 26. Level of satisfaction with economy compared to one year ago



The overwhelming majority of respondents believe that the wealth gap in the country is deep. Fifty-two percent of respondents believe it is very deep, with an additional 37 percent thinking it is deep. The responses seem to coincide with the actual situation in Albania, where according to official data, 4 to 5 percent of Albanians own more than 55 percent of all bank deposits. The aggregate perception on the wealth gap is an important indicator that shed slight on potential social frictions and hence is an important marker of the social divisions in Albania.

Table 27. Your opinion on the gap between rich and poor in the country

Despite the growing dissatisfaction with their current economic situation, respondents remain optimistic about the future. The single biggest group, with 47 percent, believes their personal situation will improve in the coming decade as opposed to a mere 11 percent who believe it will get worse. Again, the dominance of younger age groups and the effect of human hope seem to be the most plausible explanations in the absence of any follow up questions on the matter.

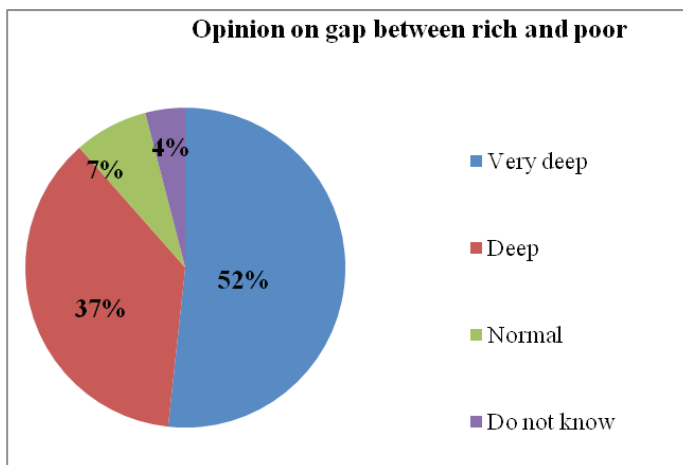
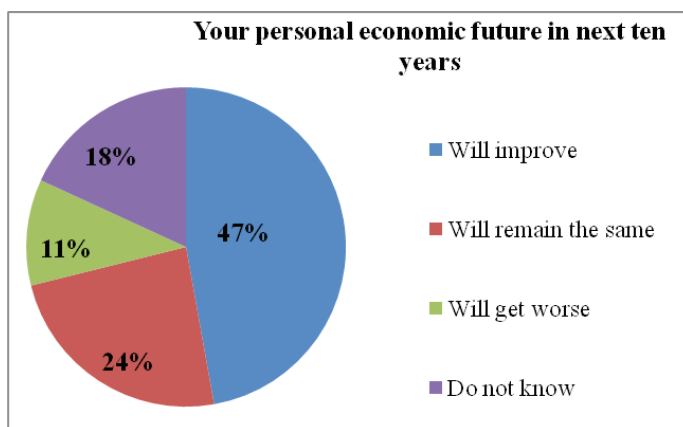
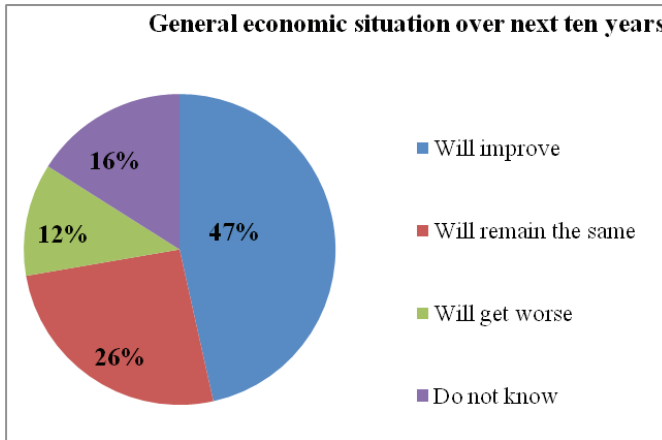


Table 28. Your personal economic situation in the next ten years



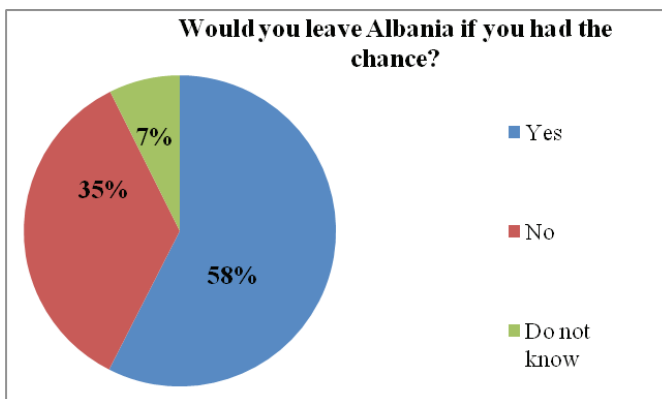
As table 28 shows, the results for the general economic situation are almost exactly the same as those related to the personal situation of the respondents.

Table 29. The general economic situation in the next ten years



Despite the levels of optimism on the future of the economy, however, the responses in Table 29 show that a strong majority of respondents, 58 percent, would still leave Albania if they had a chance. The figure is very high indeed and it shows that in the view of the respondents Albania still offers few chances for its younger generations to build a decent life in their country. Thirty-five percent of the respondents said that they would not leave the country while 7 percent didn't know.

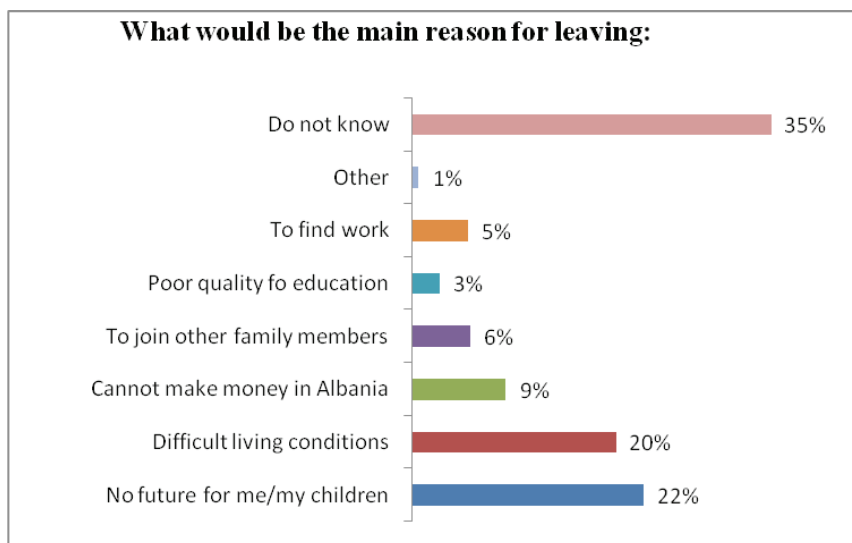
Table 30. Would you leave Albania if you had the possibility?



In an apparent contradiction to the optimism revealed about the future of the economy and the situation in Albania in general, the main reason why the respondents would leave Albania (22 percent) concerns their lack of hope for the future for themselves and for their children. Of course this consideration weighs on factors beyond the economy, including quality of basic services such as education, health care, equal opportunities etc. In light of this response one feels compelled to reinterpret and tone down the optimism of the previous answers. Economic reasons, namely difficult living conditions and the impossibility to make money in Albania, constitute the other most important reasons for living with respectively 20 and 9 percent of responses.

A large number of respondents, 35 percent, could not mention a specific reason for this response (either due to a combination of different reasons and the difficulty in picking one, or to confusion in their perception about the decision to immigrate).

Table 31. What would be the main reason for leaving?



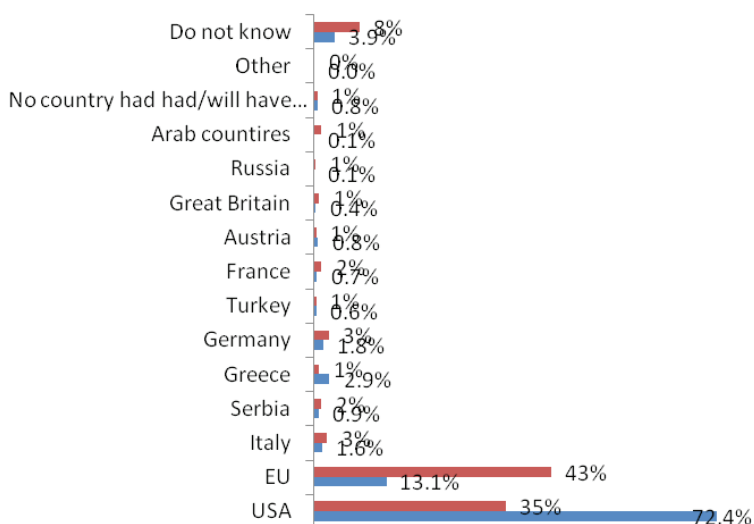
International relations

In the responses to question 30, 72.4 percent of respondents believe that the United States of America has exerted the greatest influence on Albanian governments since the fall of Communism, and only 13.1 percent believe that the European Union has had a greater influence. The explanation for this huge difference is perhaps explained by the fact that the messages sent by the European Union over the years have often had to compete with those of the chancelleries of the individual member states, none of which could hope to compete with the US in terms of influence. The role played by the US in bringing down the Communist regime, and the popularity the US enjoys among Albanians, offer additional explanations. However, when asked about the next ten years, the responses indicate that the Albanian public is aware that their future is in the EU and that the EU will play an increasingly important role than the US. That is why 43 percent of respondents have chosen the EU as opposed to 35 percent who believe the US will continue to exert greater influence.

Table 32. Which state has had the most influence on the Albanian government over the last twenty years/over the next ten years?

Significantly big groups (23 percent each) have opted for the usual culprits: Serbia and Greece when asked which state constitutes a threat to Albania's security. That said, however, it must be noted

Country with greatest influence on Albanian government over last 20 years/over next 10 years

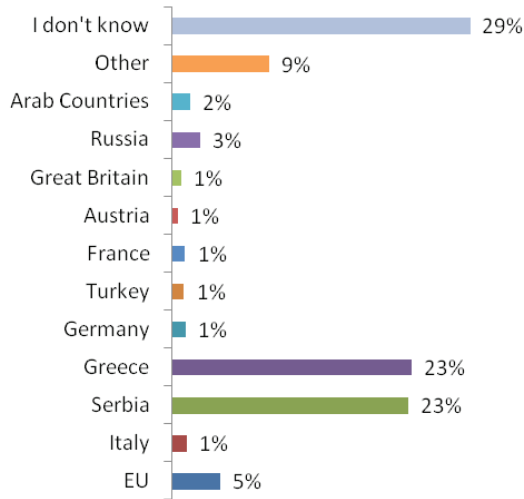


that the results of 2012 represent a far less hostile view of Greece and Serbia than those of 2011 when respectively 51.6 and 47.9 of respondents identified Serbia and Greece as the greatest threats to security in Albania.

Table 33. Which of the following states constitute the greatest threat to the security of Albania?

The fact that Greece and Serbia are seen as the main threats – in itself a product of history, friction about Kosovo or territorial claims, the way in which relations between the countries are portrayed in the media and of an increasingly nationalistic and even jingoistic political rhetoric – has influenced the answers of the respondents on regional cooperation, too. Thus Serbia and Greece have the lowest score on levels of 8 to 10, with Serbia having also the highest percentage of rejections. Bosnia and Herzegovina has also not fared well, but rather

Country representing biggest threat to Albania's security



than the product of some historical rivalry with that country, this situation seems to be the result of the insignificant level of relations and exchanges between the countries. Not surprisingly, Kosovo is by far the most important country for the respondents, followed by Turkey, which in recent years has increased its economic, cultural and political presence in Albania significantly.

Table 34. Indicate on a scale of 1 to 10, where 1 is “not at all” and 10 is “a lot” with which countries should Albania increase regional cooperation?

Regional cooperation	1	2	3	4	5	6	7	8	9	10
Bosnia and Herzegovina	14%	10%	8%	9%	17%	11%	9%	6%	4%	9%
Greece	15%	5%	6%	7%	14%	9%	7%	9%	10%	16%
Kosovo	3%	1%	2%	5%	5%	4%	7%	7%	12%	51%
Croatia	3%	5%	7%	7%	11%	11%	11%	13%	13%	17%
Montenegro	3%	6%	5%	7%	10%	10%	13%	11%	15%	19%
Macedonia	5%	6%	5%	6%	10%	9%	11%	12%	14%	20%
Serbia	32%	8%	9%	5%	9%	5%	5%	7%	6%	10%
Turkey	2%	1%	1%	3%	5%	4%	10%	13%	19%	39%

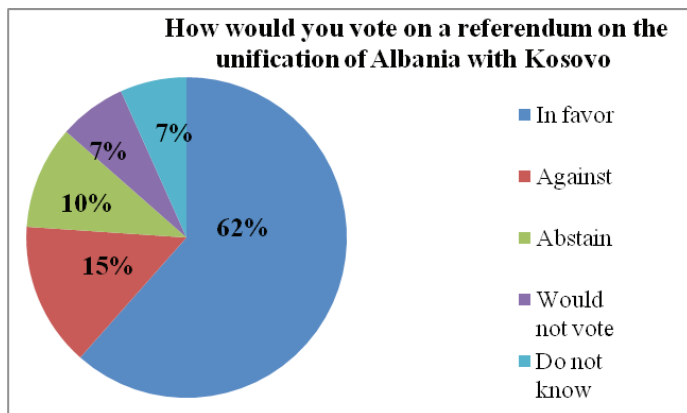
Answers in Table 35 seem to contradict somewhat those in Table 32, since the EU is judged to be the most important strategic partner of Albania for the moment, with 53 percent, as well as in the future with 59 percent. The US is but a distant second and declining from 30 percent actually to 22 percent in the next ten years. The levels of importance in terms of strategic partnerships, attached to the other countries in the list, are insignificant.

35. Which of the following countries/groups of countries is more important strategically to Albania (only one answer)?

	Now		In the next ten years	
	Number	%	Number	%
EU	634	53%	697	59%
Greece	37	3%	33	3%
Italy	47	4%	39	3%
Russia	20	2%	11	1%
USA	363	30%	264	22%
Turkey	17	1%	17	1%
Arab countries	14	1%	39	3%
Do not know	59	5%	91	8%
Total	1191	100%	1191	100%

Results in Table 36 show that an overwhelming majority of the public, 62 percent supports the idea of unification with Kosovo. Only 15 percent would vote against the union, and 10 percent would abstain. A very small percentage, 7 percent said that they would not participate in this kind of ballot. The results mark a significant change from 2011, when only 39 percent of respondents declared themselves in favor of unification, as opposed to 23 percent of respondents who were against unification.

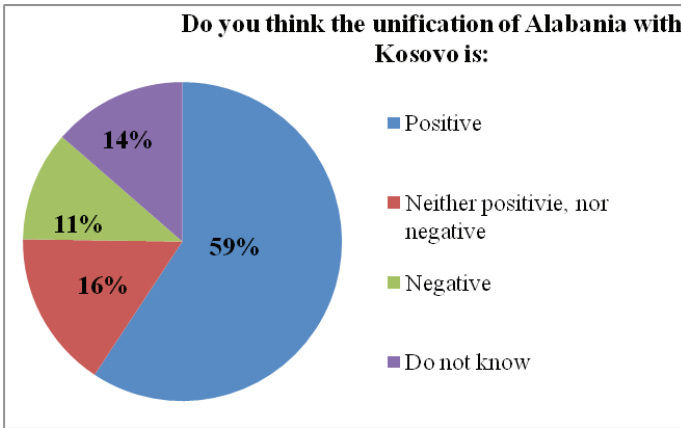
Table 36. How would you vote in a referendum for the unification of Albania and Kosovo?



Despite the debates and reservations about the viability of such a union, a majority of respondents, almost 60 percent, think that it would be positive. Sixteen percent see it neutrally, while only one in ten respondents thinks that it would be a negative development. The levels of support are high among all categories, but support among the above-70 age group is far higher standing at 76 percent. This result marks a dramatic change from the results scored in the 2011 survey when only 9 percent of respondents answered that unification would be positive, as opposed to 35 percent who claimed it would be negative. One is at a loss to explain this significant shift in attitudes, but perhaps the rise of nationalistically inspired political movements has had an influence on the opinions of the public vis-à-vis unification.

Table 37. Is the unification of Albania with Kosovo positive or negative?

In the last question of the survey, respondents were asked to evaluate the chances of Albania joining the EU in the next ten years. There is a widely held belief in Albania – expressed by experts and



the media - that the country stands a good chance to join the Union by the year 2020. Respondents also seem to share this opinion. Twenty-nine percent believe that it is 100% guaranteed that this will happen, while a 26 percent believe there is a good chance of this happening. Twenty-three percent of respondents believe that there is some chance of this coming true.

Table 38. What chance does Albania have to join the EU in the next ten years?

