








Corruption Benchmarking in Serbia

Perception of corruption at the household level, 4th round

TNS Medium Gallup

Report prepared for UNDP Serbia, November, 2011

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- The United Nations Development Programme (UNDP) is supporting the Government of Serbia and civil society efforts to promote governance, accountability and transparency, and to combat corruption by monitoring corruption perceptions and the incidence of corruption at the household level.
- TNS Medium Gallup conducted the initial Corruption Benchmarking Survey in October 2009, the second round in March 2010 and the third in October 2010. This report presents the results of the fourth round, conducted in November 2011.
- The main goal of the survey was to explore Serbian citizens' perception of the level of corruption in Serbia, as well as their experience with corruption. The survey gathers data on public attitudes and the scope and incidence of corruption nationwide. The baseline for the survey and the questionnaire design was the Transparency International Corruption Barometer and benchmarking studies conducted in comparable countries.

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| | |
|-------------------------|--|
| SURVEY TYPE | <i>Ad hoc</i> quantitative field survey |
| TECHNIQUE | Direct, face to face interview |
| SAMPLE | Multi-stage random sampling Voting population of Serbia (18+) Total sample N = 604 Belgrade sub-sample N = 135 |
| TERRITORY | Serbia |
| QUESTIONNAIRE | Structured questionnaire: the same questionnaire is used in all four rounds (except for the question regarding the Anti-corruption Agency, which was posed only in the second, third and fourth rounds). |
| WEIGHT | By education and age |
| FIELDWORK PERIOD | November 04 th – 11 th , 2011 |

| | Initial survey October 2009 | 2 nd round March 2010 | 3 rd round October 2010 | 4rd round November 2011 |
|---------------------------------|--------------------------------|-------------------------------------|---------------------------------------|---|
| TOTAL SAMPLE | N= 1014 respondents | N= 601 respondents | N= 600 respondents | N= 604 respondents |
| Belgrade sub- sample | N=239 | N=175 | N=184 | N=135 |

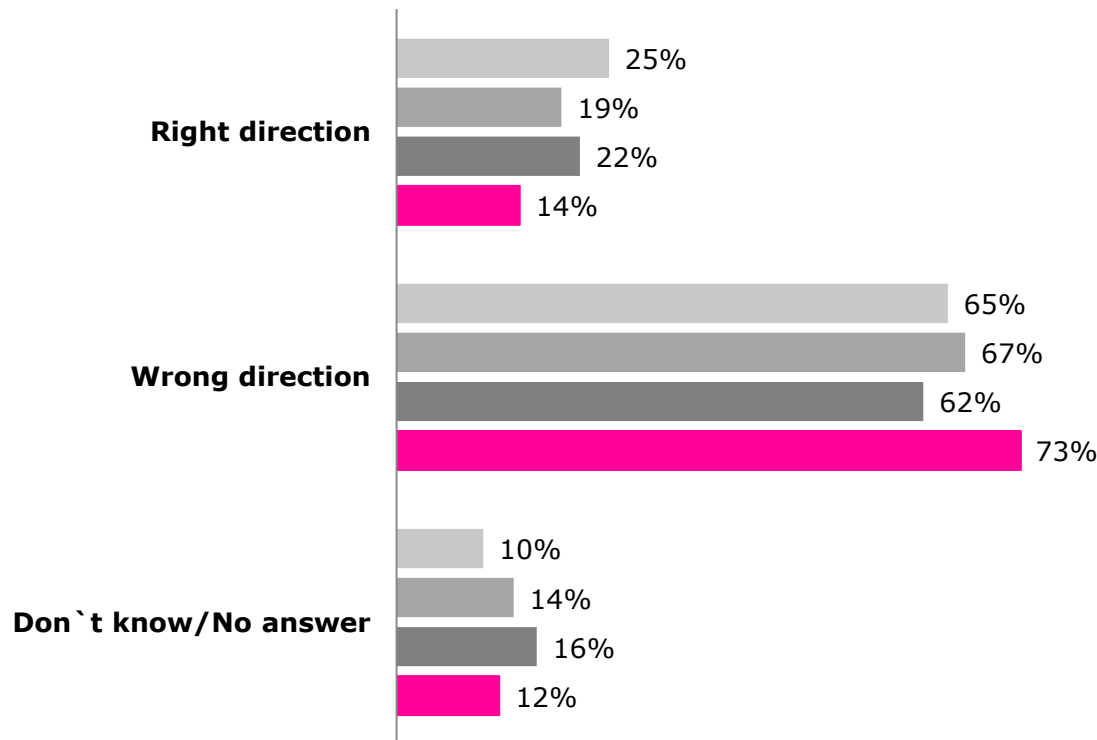
Socio-economic situation

Serbia – direction, where is it going

Negative impressions

In general, do you feel that things in Serbia are going in the right or in the wrong direction?

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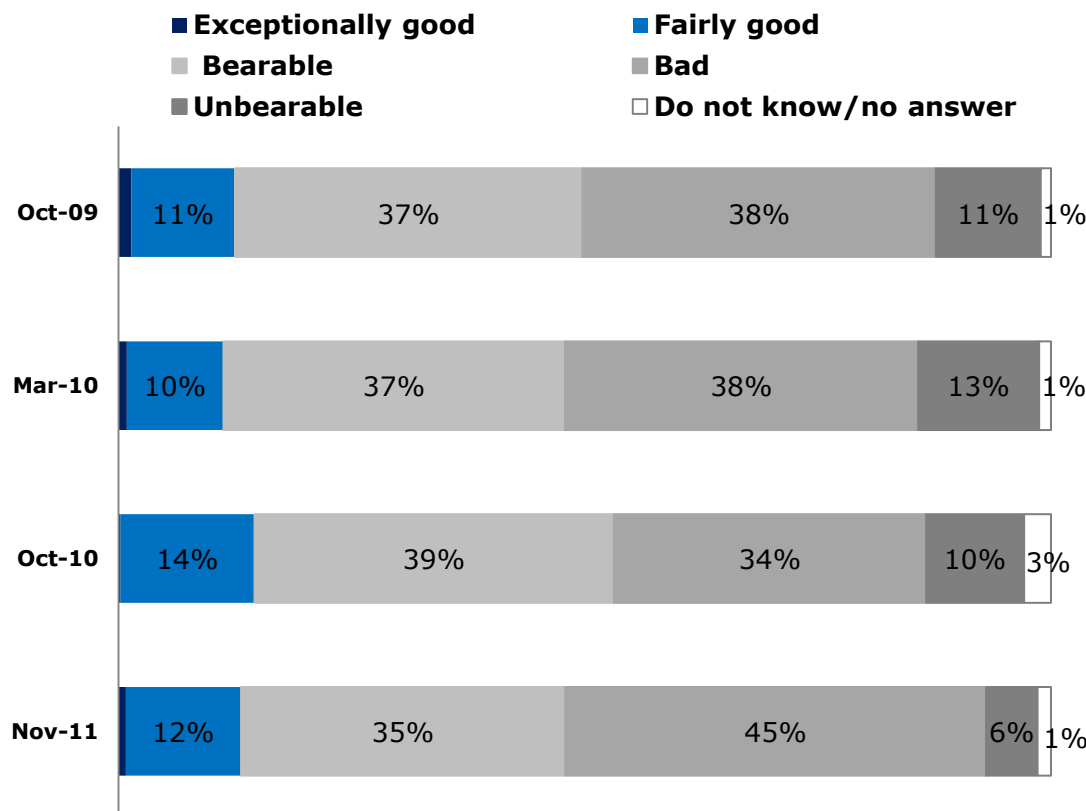
Serbian citizens' general impression regarding developments in their country is rather pessimistic. The majority feel that Serbia is heading in the wrong direction, while only 14% think that the country is heading the right way. There are also a high number of undecided respondents, revealing citizens' general confusion regarding this topic.

A comparison with all previous survey rounds shows that fewer respondents currently think that things are heading in the right direction.

Financial situation

Grim picture

How would you evaluate your current financial situation? Would you say it is...



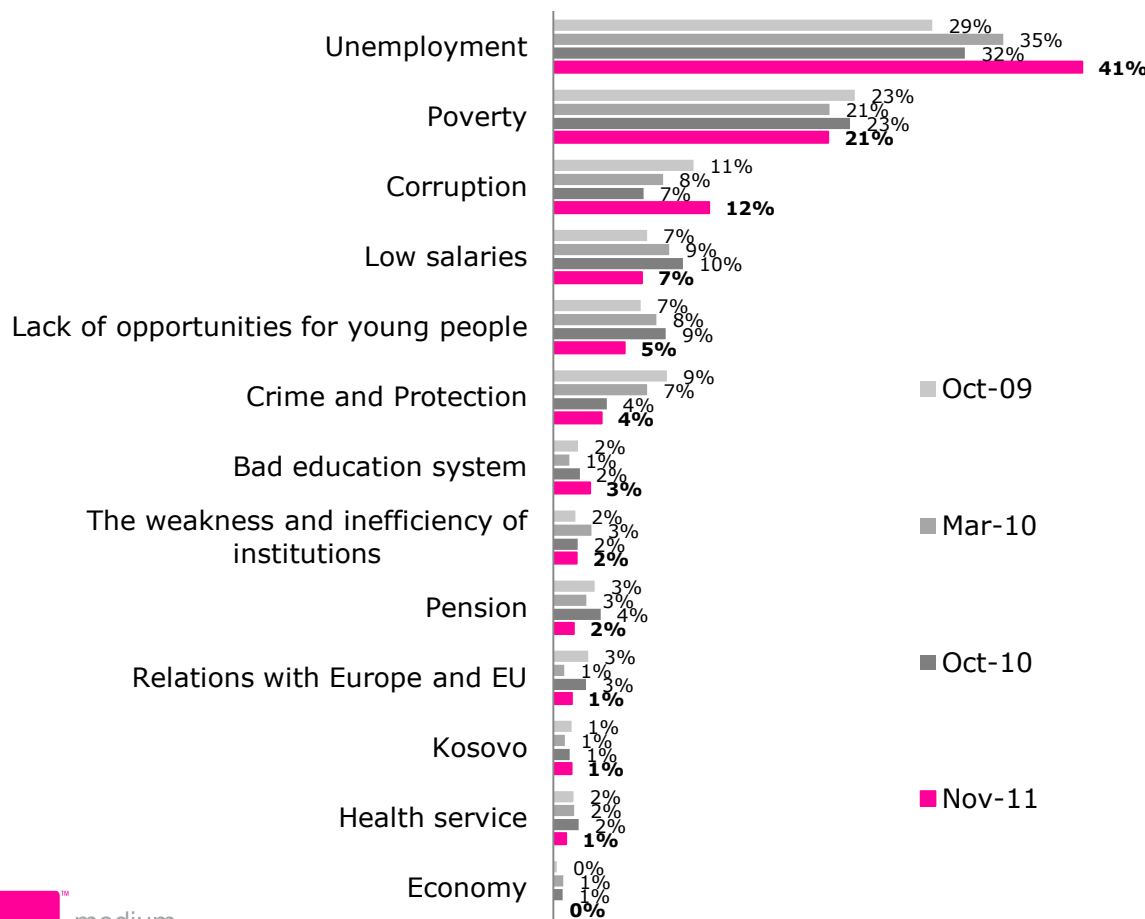
Results regarding the financial situation paint a grim picture. In November 2011, 51% of citizens describe their financial situation as bad or even unbearable. Only a small number of people are living pretty well, while 1% describes their situation as very good.

The dispersal of answers is very similar to those recorded in previous rounds. In November 2011, compared to the period one year earlier, slightly more people describe their financial situation as bad, but fewer people describe it as unbearable.

Most important social problems

Unemployment, corruption – grown

In your opinion, what is Serbia's most important social, economic or political problem today?



Unemployment proves to be the biggest and most important problem concerning the people of Serbia today – 41% of respondents report this problem. Poverty (21%), corruption (12%) and low wages (7%) also prove to be major and frequently cited problems.

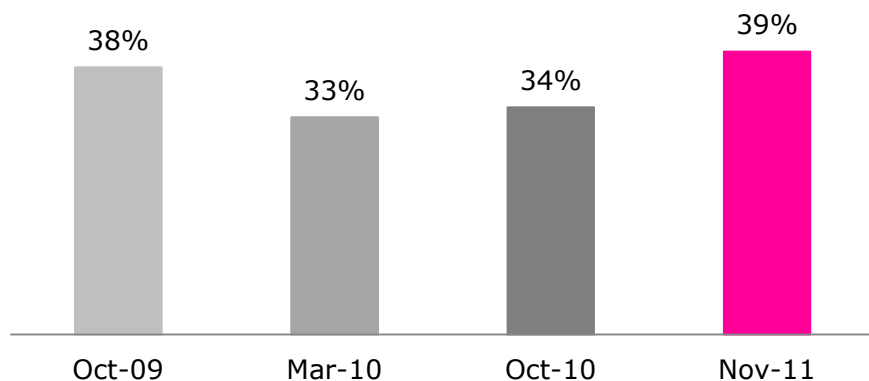
Unemployment and poverty have been the most serious chronic problems burdening the citizens of Serbia for a long time and they are mentioned most frequently in all four rounds of the survey. Corruption fell to fifth place in October 2010 from third in October, 2009, then from fourth in March 2010 to again find itself ranked third among social troubles in November 2011.

Experience with corruption

Experience with corruption

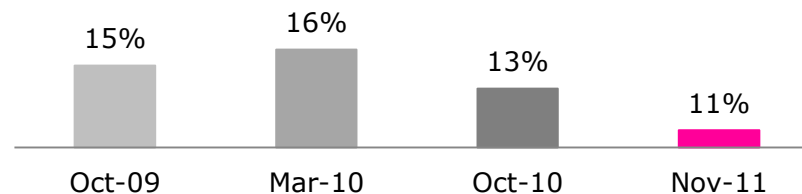
INDIRECT EXPERIENCE: Has anyone close to you (cousins or close friends) paid a bribe in any form (gifts or money) in the past three months?

% of YES answers



DIRECT EXPERIENCE: In the past three months have you paid a bribe in any form (gifts or money)?

% of YES answers

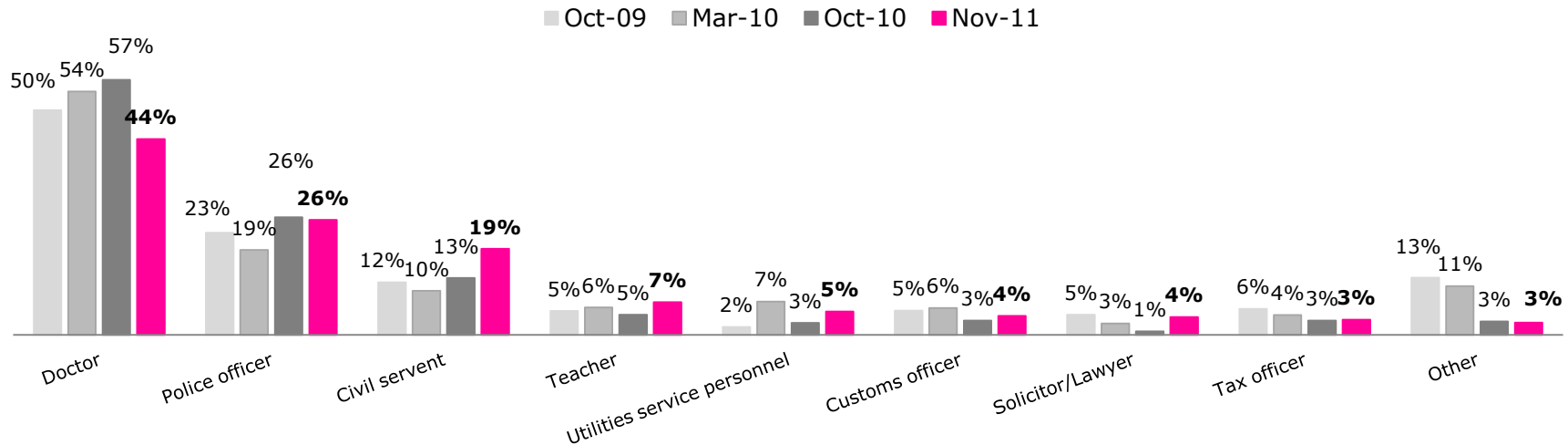


In November 2011, 39% of respondents say that someone in their closest social circle (relatives or close friends) has given a bribe in the previous three months. This is slightly higher than in the previous round of October 2010 (34%).

Fewer respondents (11%) report their direct involvement in corruption. The number of those who paid (or admit to paying) a bribe is similar to results in previous rounds. The majority of respondents who paid a bribe (56%) did so once, while 24% paid bribes twice, 12% paid three times and 8% did it four or more times.

Health sector registers greatest gain but still struggles most with corruption

To whom have you paid bribe in the past three months? MULTIPLE ANSWERS



In most cases the bribe was given to doctors (44%), then police officers (26%) and civil servants (19%). The trend of corruption among public administration officials is growing, though it is unchanged among the police and is declining among doctors. Corruption in other sectors is rarely reported.

The average sum of money paid as a bribe in November 2011 is €178. This is lower than the €255 paid in the previous survey round (October 2010) and slightly higher than the previous €169 (March 2010) and €164 (October 2009).

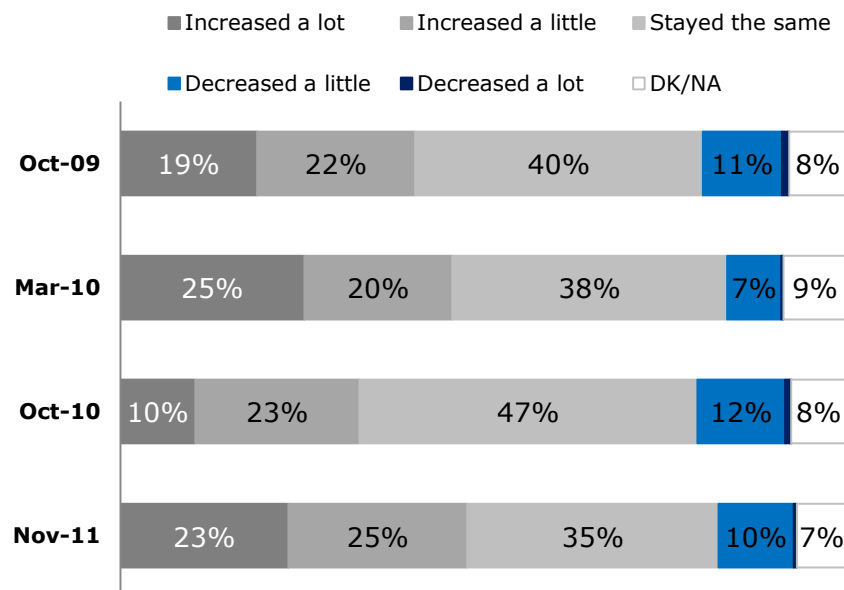
Those who paid bribes most commonly offered it themselves (70%), while 37% of respondents say that the bribe was requested. In this round there is an increase of directly sought bribes, especially in comparison to the previous round (23% in October 2010).

Corruption perception

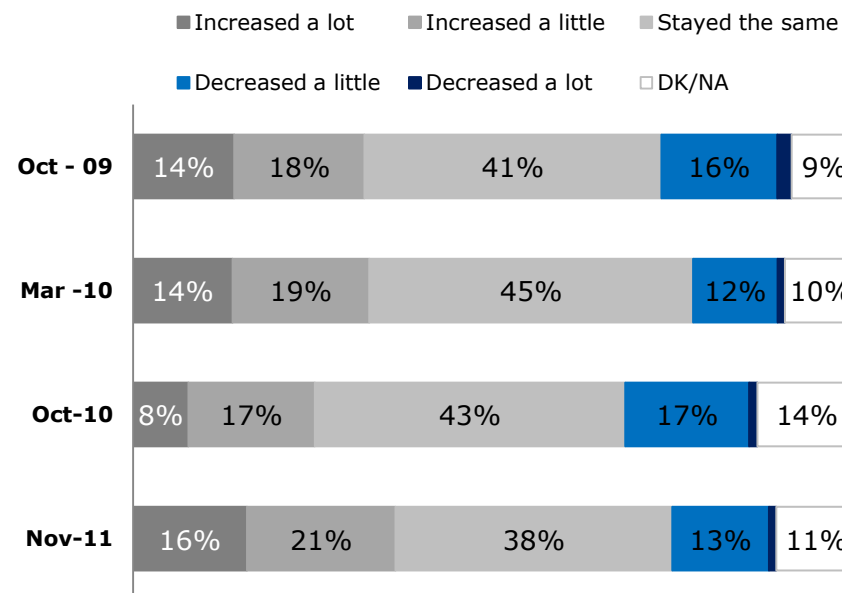
Level of corruption

Perception – corruption has increased Poor expectations for next year

In the past year, how has the level of corruption changed?



Do you expect the level of corruption to change in the next year? Will it...



In November 2011 a much larger proportion of respondents believe corruption levels have increased over the previous year.

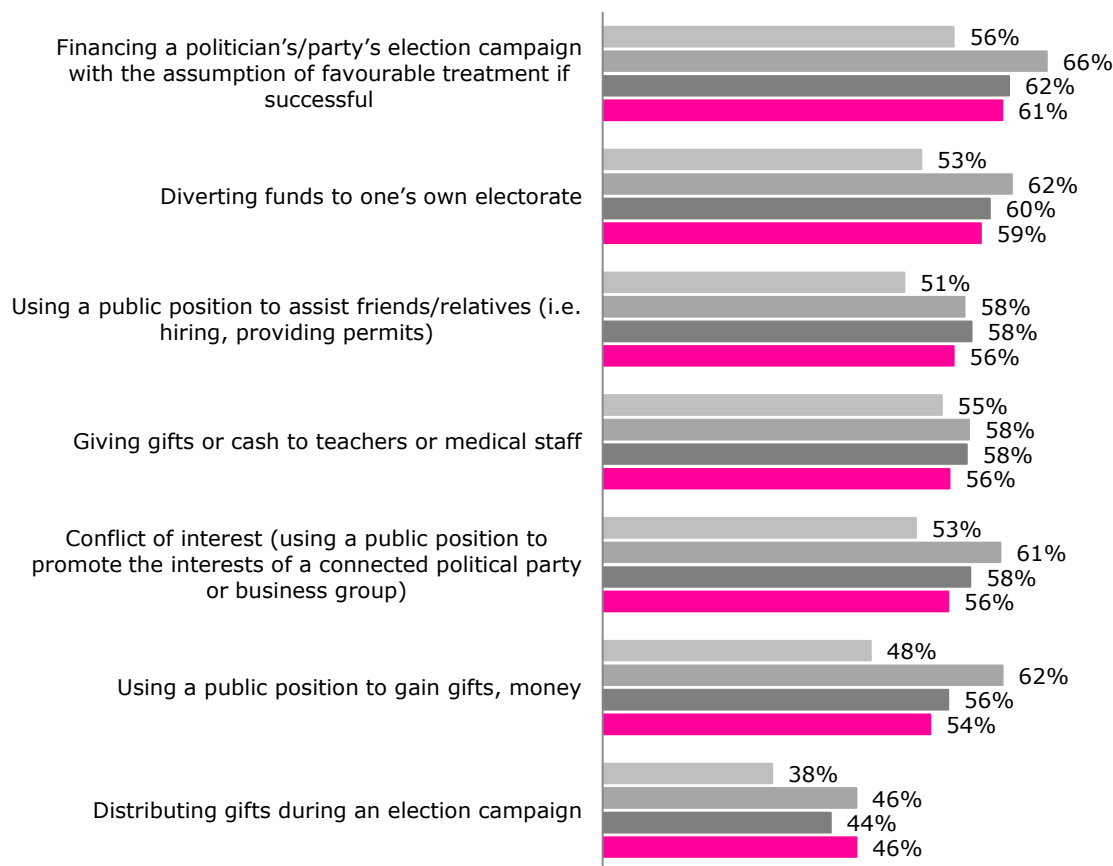
Expectations for next year regarding the level of corruption are slightly more negative than in previous rounds. In this round more people expect an increase and less expect a fall in corruption levels during the year ahead. However, the percentage of citizens expecting the level of corruption to remain the same is similar to figures recorded previous rounds and negative expectations remain more frequent than positive.

Presence of corruption

If you regard something as corruption, to what extent do you think it is present?

Scale 1 - 4, where 1 means "not at all" and 4 means "to a large extent". The graph shows % of 'to a large extent'

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Perceived level of all listed cases is somewhat lower then in a previous round of survey (except Distributing gifts in election campaign).

The three most common problems, according to respondents, are financing election campaigns in order to receive benefits in return, diverting state funds to favour a party's own electorate and using a public position to aid friends and relatives.

Attitudes and beliefs about corruption

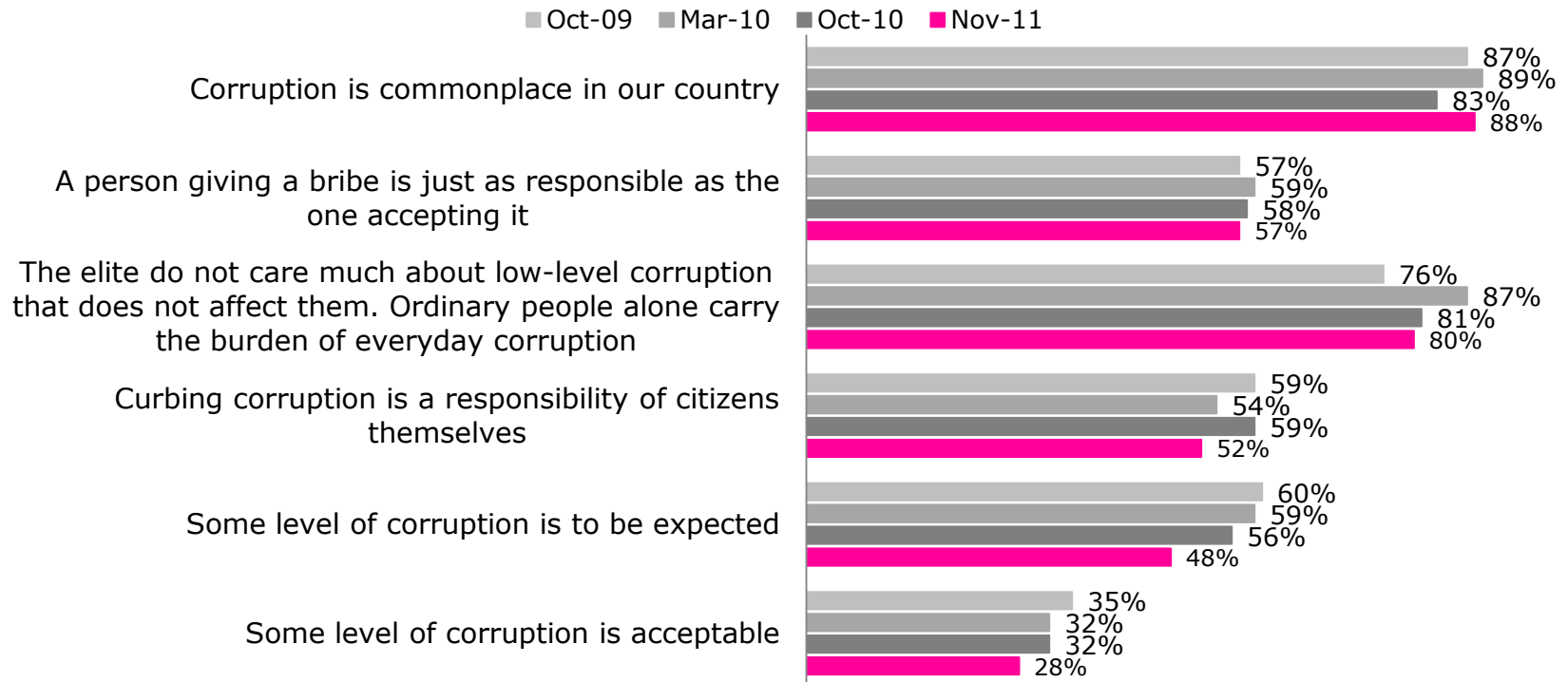
Accustomed to corruption

Serbia Corruption Benchmarking Survey,

4th round, November, 2011

Could you express your opinion regarding the following statements?

Scale 1 – 4; The table shows % of answers "Mostly agree" and "Completely agree" with the statement.



The results from the fourth round confirm those from previous rounds. Citizens are basically accustomed to corruption – 88% agree that corruption is commonplace in Serbia and 48% agree that some level of corruption is to be expected. Ordinary people feel that they are the victims of corruption in everyday life, while the elite are perceived as being protected and disinterested regarding corruption (80%). Despite the fact that the fight against corruption needs to be generated and led by the government, citizens seem to underestimate their own role, contribution and responsibility. Slightly more than half of respondents (52%) think that there is less corruption thanks to citizens themselves, while 57% think that a person giving a bribe is as responsible as the one accepting it.

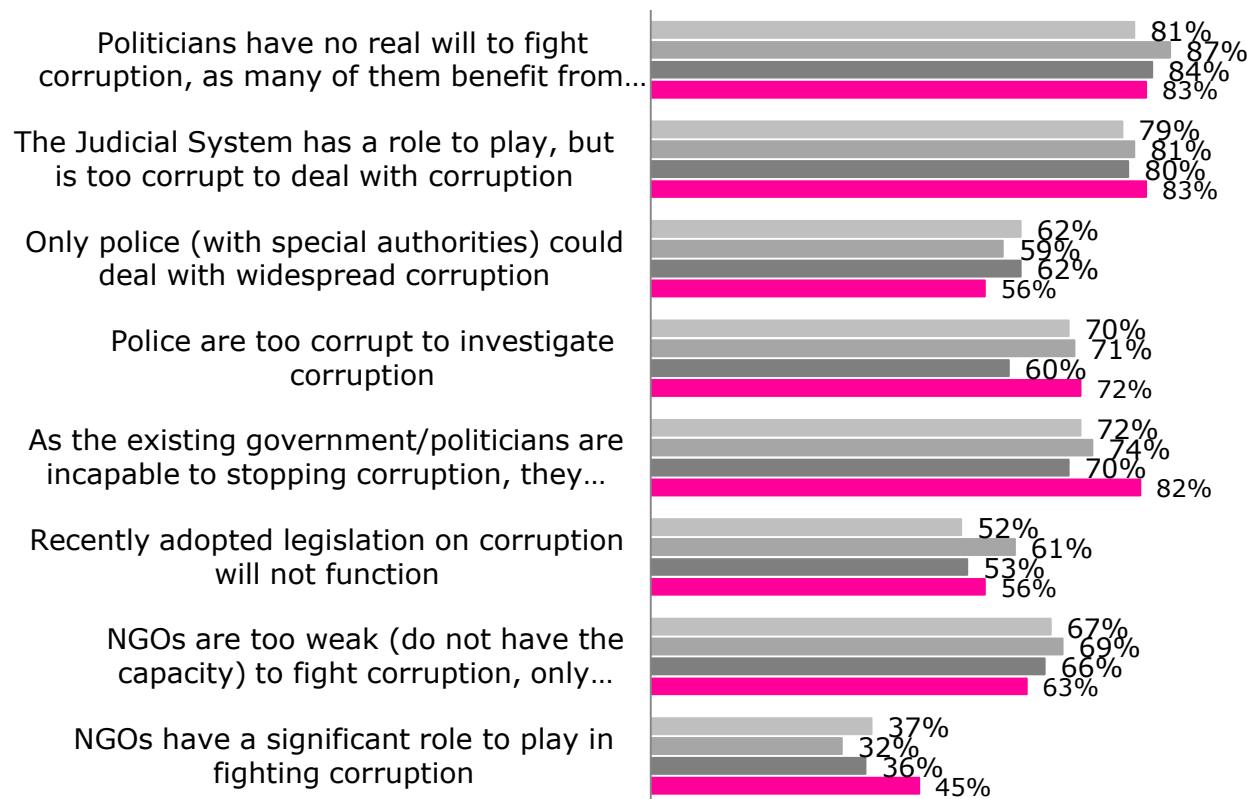
Attitudes and beliefs about corruption

Negative perception of politicians and judicial system

Could you express your opinion regarding the following statements?

Scale 1 – 4; The table shows % of answers "Mostly agree" and "Completely agree" with the statement.

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Respondents have a very negative perception of politicians and the judicial system. The public feel that they have no real will to combat corruption, because they are themselves corrupt. This was the prevailing opinion through all four rounds of the survey.

Furthermore, the majority believes that the government/politicians are incapable of stopping corruption and that, consequently, should be replaced. Furthermore, the belief that the police are too corrupt to investigate cases of corruption has increased compared to last year, from 60% to 72%.

Attitudes and beliefs about corruption

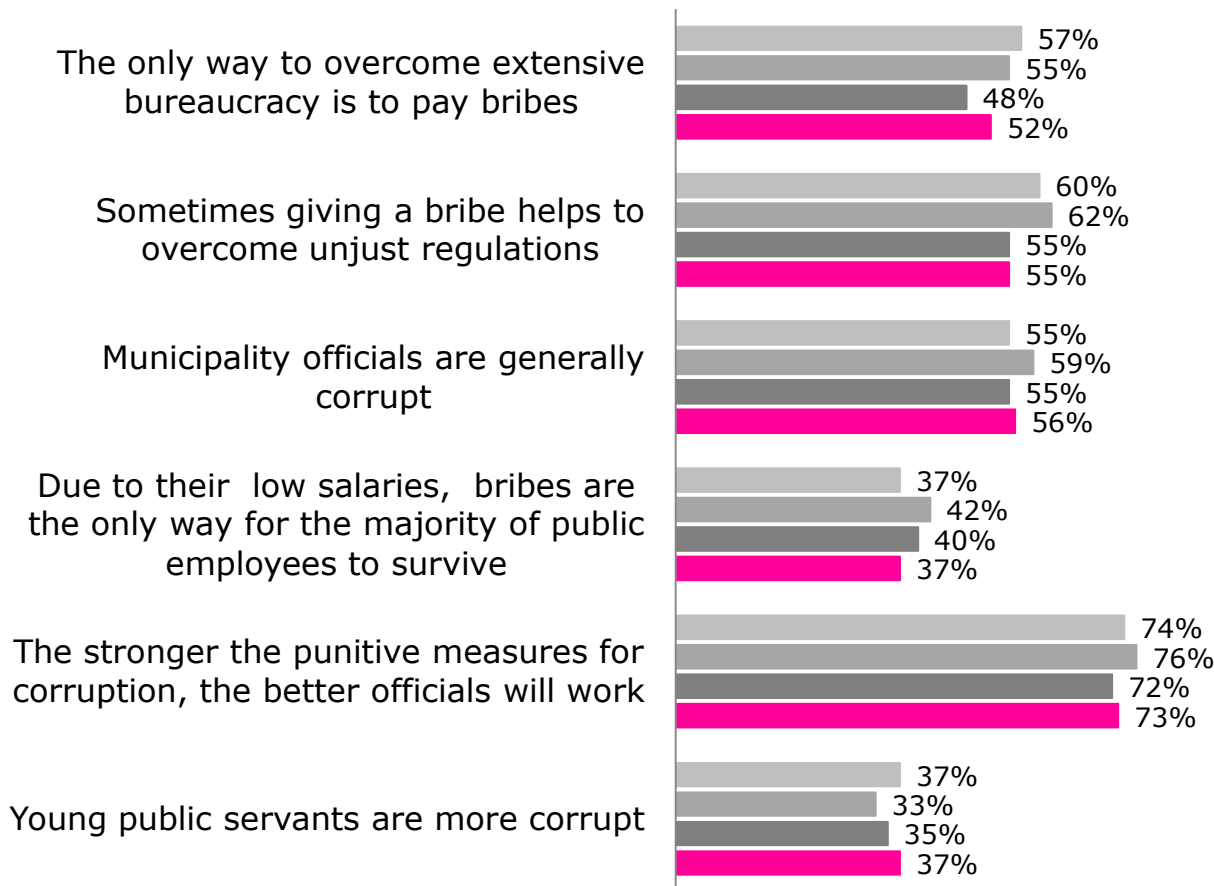
Serbia Corruption Benchmarking Survey,

4th round, November, 2011

Could you express your opinion regarding the following statements?

Scale 1 – 4; The table shows % of answers "Mostly agree" and "Completely agree" with the statement.

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Opinions regarding public administration and civil servants are generally similar to those of October 2010. The percentage of those who believe that paying bribes is the only way to overcome extensive bureaucracy has slightly increased from 48% in October 2010 to 52% in November 2011. The prevailing opinion is still that severe penalties are the best measure for reducing corruption in public administration. However, it is notable that there is some level of understanding for corruption among public sector employees - 37% of respondents believe that bribery is the only way for them to survive, due to their low salaries.

Attitudes and beliefs about corruption

Serbia Corruption Benchmarking Survey,

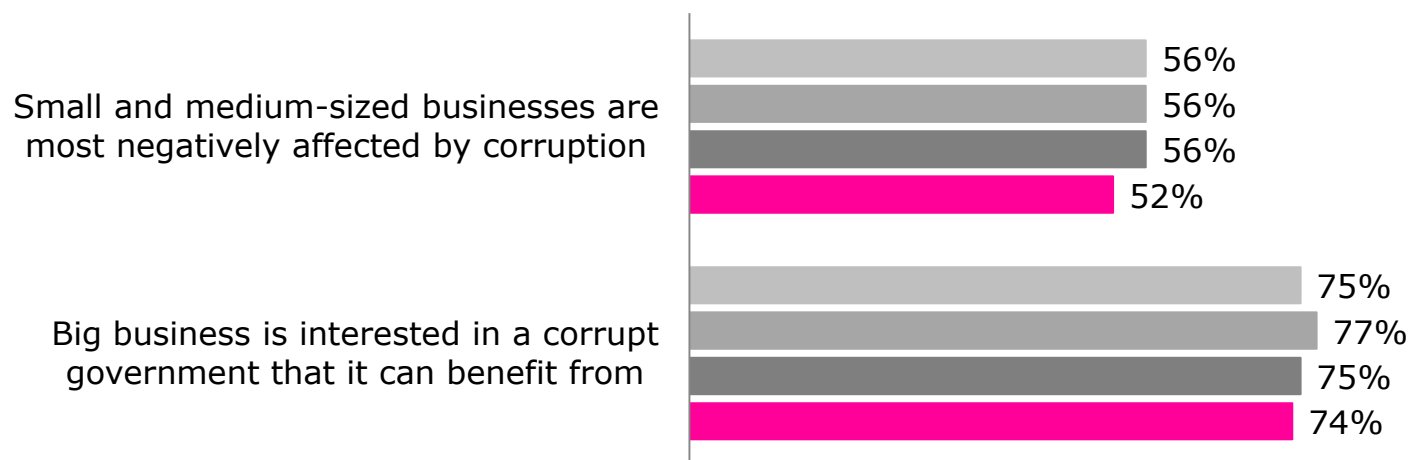
4th round, November, 2011

Large companies benefit and small and medium lose due to corruption

Could you express your opinion regarding the following statements?

Scale 1 – 4; The table shows % of answers "Mostly agree" and "Completely agree" with the statement.

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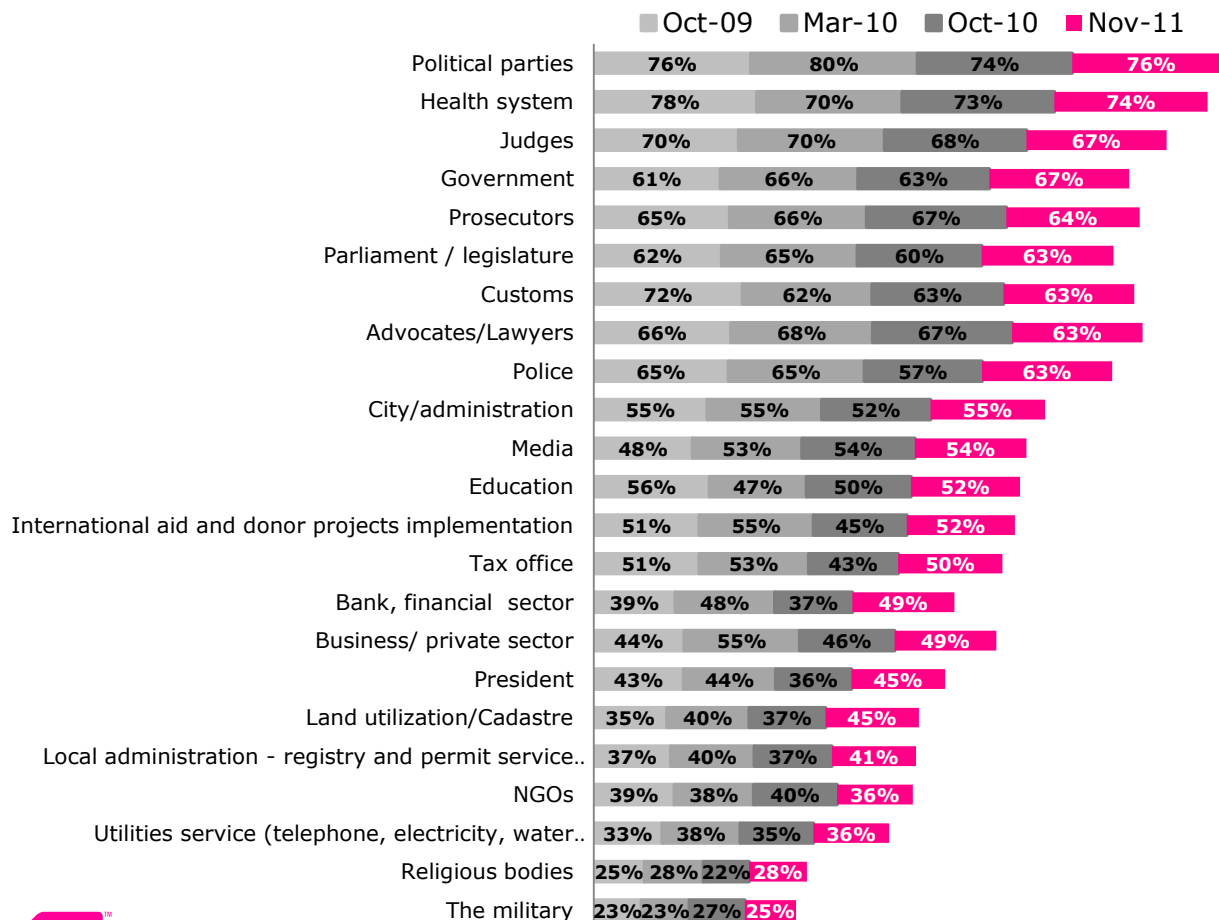
The prevailing opinion in all four rounds is that large companies are an important link in the corruption chain. A large majority of citizens (74%) think that it is in the interests of major enterprises to have a corrupt government that they are able to bribe, thereby realizing their own interests. Small and medium-sized businesses are perceived as a sector negatively affected by corruption.

Corruption by sector

Political parties top the list

To what extent do you perceive the following sectors in this country as being affected by corruption?

Scale 1 – 5; The graph shows % of answers "Significantly affected" and "Extremely affected".



Political parties are perceived as the most corrupt sector. They were also perceived as being most affected by corruption in the previous rounds.

International aid and donor projects, the tax office, private businesses, as well as banks and the financial sector, are perceived in November 2011 as very corrupt sectors by about half of the citizens of Serbia, which represents a worse result compared to October last year.

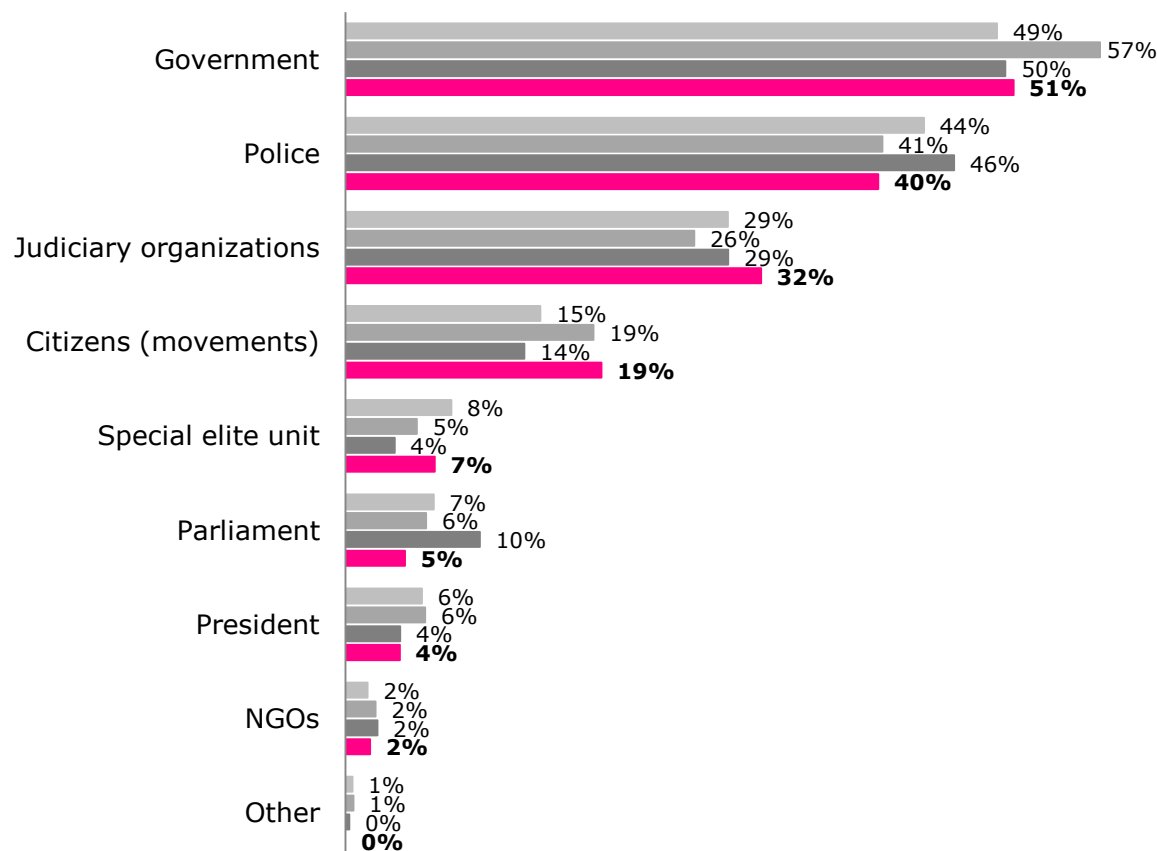
Anti-corruption leaders

Citizens and civic initiatives and judiciary - seen more often as leaders of this fight

Who should lead the fight against corruption?

MULTIPLE ANSWERS

■ Oct-09 ■ Mar-10 ■ Oct-10 ■ Nov-11



According to Serbian citizens, the government (51%) and the police (40%) should be leading the fight against corruption. In November 2011 the government and the police are less frequently mentioned in this sense. This reflects a decrease of trust in police initiatives aimed at combating corruption. Citizens and civic initiatives, judiciary and special elite units are referred to as leaders of this fight more often than in previous rounds.

Factors that hinder the fight against corruption

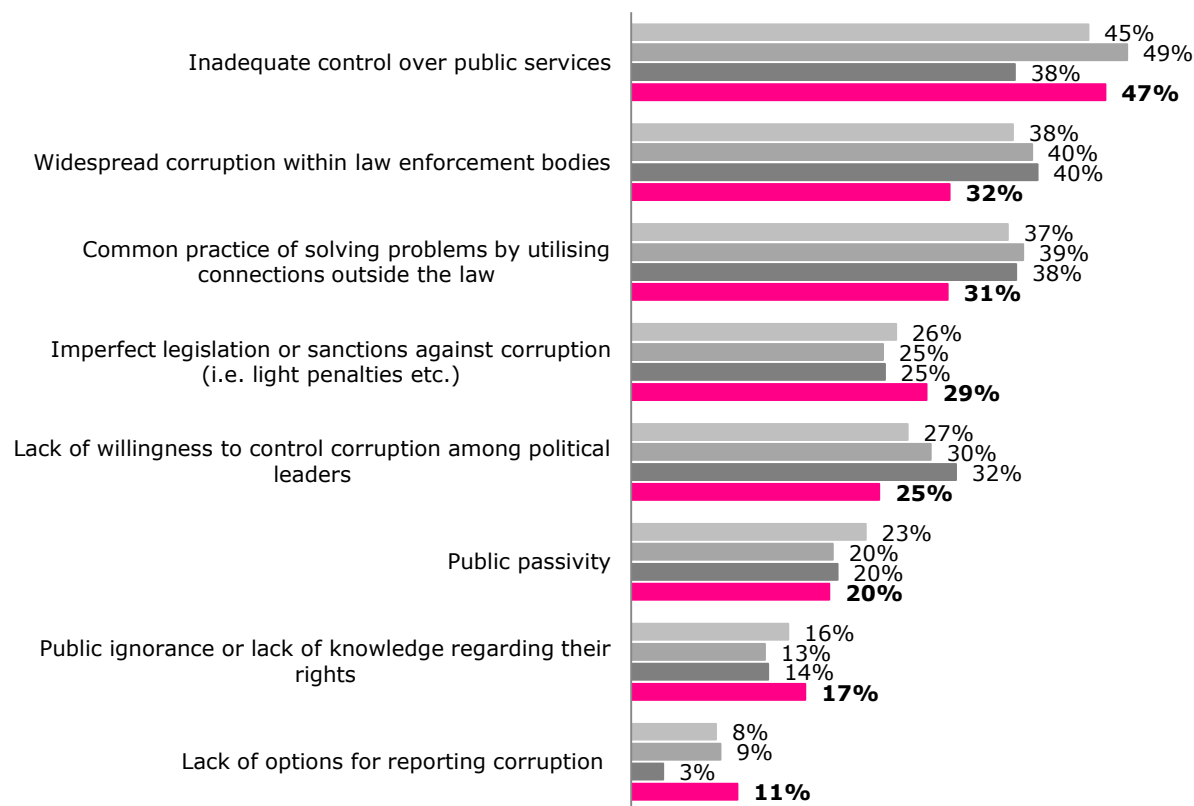
Serbia Corruption
Benchmarking Survey,

4th round, November, 2011

Inadequate control of state services as the most hindering factor

In your opinion, which factors most hinder efforts to combat corruption? MULTIPLE ANSWERS

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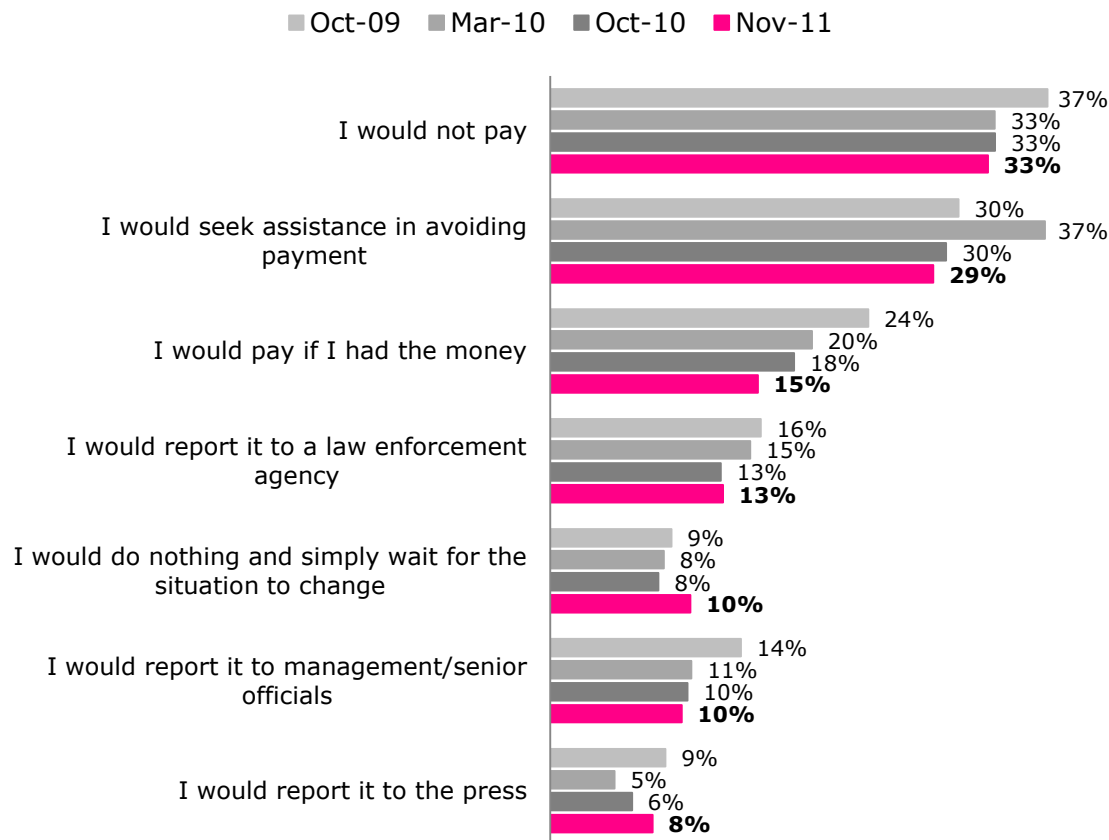


In November 2011, insufficient control over public services is perceived as the major factor hindering the fight against corruption. Other factors most commonly cited as hampering anti-corruption efforts are the common practice of solving problems by using connections outside the law, widespread corruption within bodies responsible for monitoring corruption and a lack of good legislation with inadequate (too lenient) penalties for corruption. In November 2011, 25% of citizens believe that there is a lack of will among politicians to control corruption, which marks a decrease on last year. The public's passivity and ignorance are also deemed as hindering the fight against corruption. Moreover, far more respondents now see a lack of options for reporting corruption as one of the problems.

Citizens reactions

Third of respondents would not pay a bribe

If you were in a situation in which you were directly requested to give a bribe to a public or private official, what would your possible reaction be? MULTIPLE ANSWERS



A third of respondents say they would not pay a bribe if one was solicited. In 29% of cases, they say they would try to avoid payment by looking for someone to help them, while 15% of respondents would agree to pay a bribe if they had the money.

Some 13% of respondents would report bribe solicitation to law enforcement bodies; 10% say they would report it to management and 8% would tell the press.

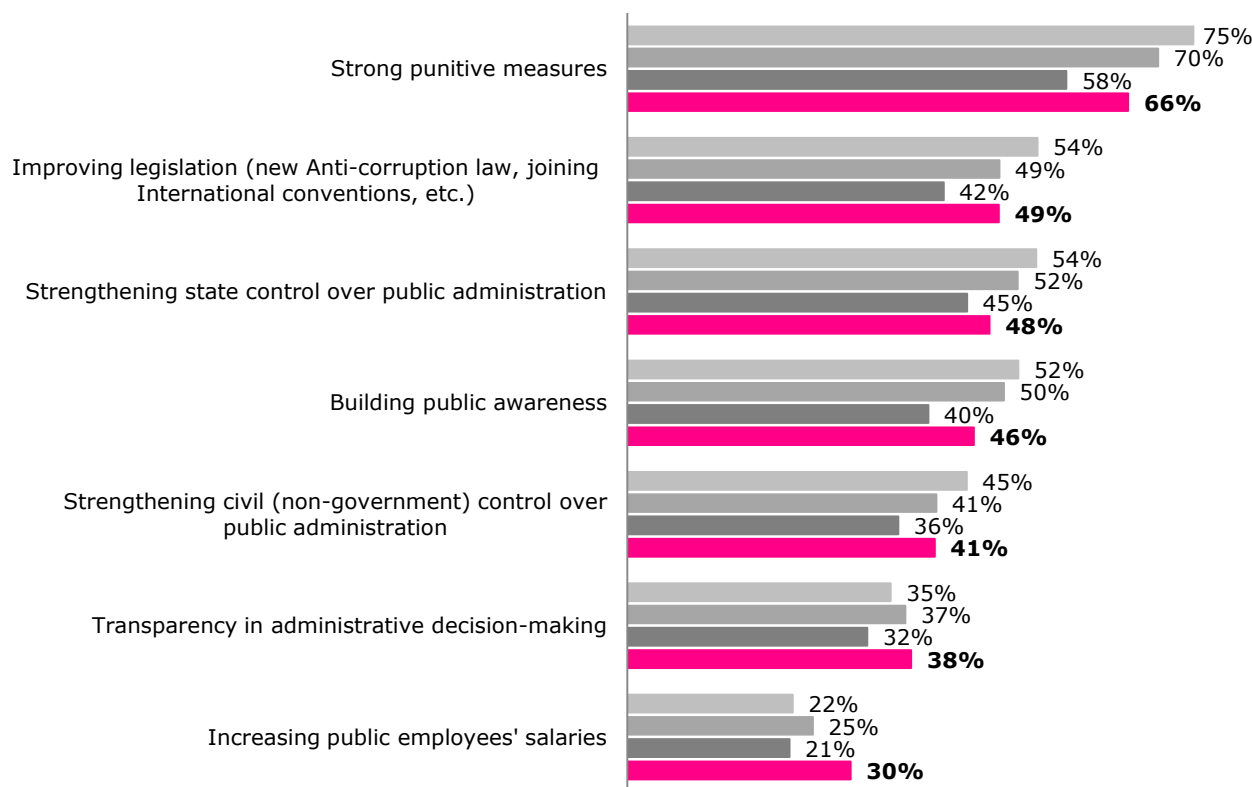
Measures to combat corruption

Strong punitive measures

To what extent do you think the following actions would be effective in preventing corruption?

1 - 4 scale where 1 means "Not at all" and 4 means "To a large extent". The graph shows % of "Large extent" answers.

■ Oct-09 ■ Mar-10 ■ Oct-10 ■ Nov-11



On the whole, belief in the strong effectiveness of measures aimed at preventing corruption has increased. It seems that people have gained faith that something could seriously be done with regard to the reduction of corruption.

Strong punitive measures are perceived as the most efficient instrument for reducing corruption. Respondents also believe that improving legislation and strengthening state control over public administration would also reduce corruption levels.

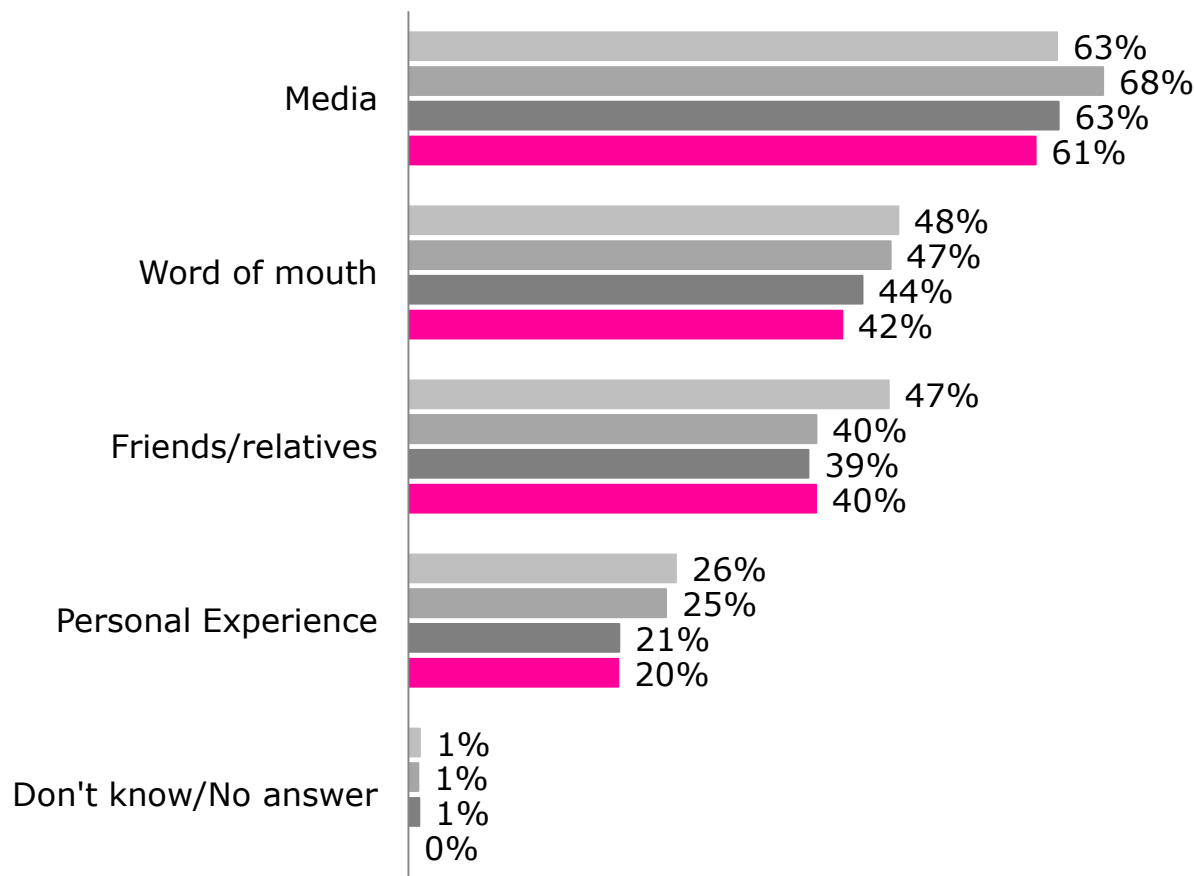
Informing about corruption and Anti-corruption Agency awareness

Informing about corruption

Media - most common source of information

Where do you get your information about corruption?

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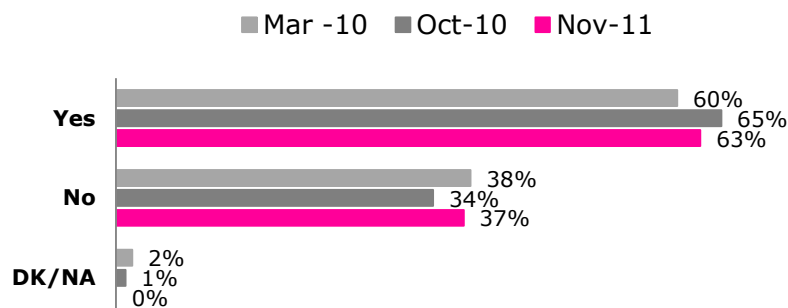


As in previous rounds, the November 2011 results reveal that people are mainly informed about corruption by the media (61%), while word of mouth (42%) and friends/relatives (40%) are the second and third most common sources of information respectively. Personal Experience represents a source for 20% of citizens.

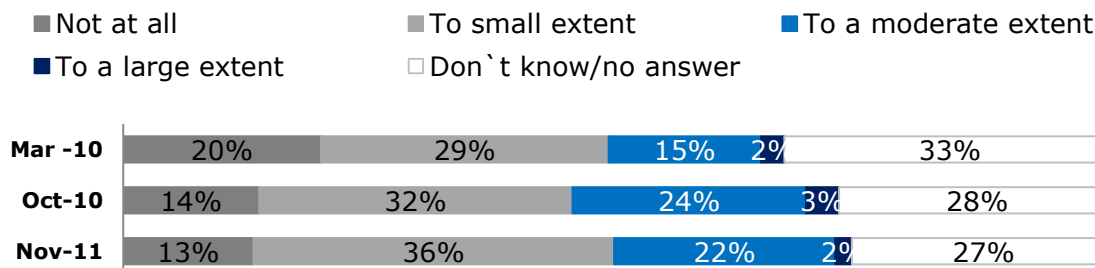
Anti-corruption Agency

Recognition and perception of the Agency's contribution similar as in the previous wave

Have you heard of the Anti-corruption Agency?



The Anti-corruption Agency is an independent state body with objectives and authority in the domain of combating corruption through different activities. In your opinion, to what extent does this body contribute to curbing corruption?



Awareness of the Anti-corruption Agency, ACA, is at levels similar to those recorded during previous rounds – in excess of 60% of citizens have heard of the ACA.

Most citizens believe that the ACA contributes to the clampdown on corruption to a lesser extent (36%), while 22% believe it contributes to a moderate extent.



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Thank you!

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