



# The Economic Cost of Exclusion

Based on Sexual Orientation,  
Gender Identity and Expression,  
and Sex Characteristics in the  
Labor Market in the  
**Republic of North Macedonia**



Report | September 2023





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# Abbreviations

<b>ALMP</b>	Active Labor Market Program
<b>ERA</b>	LGBTI Equal Rights Association for Western Balkans and Turkey
<b>EU-SILC</b>	European Union Survey on Income and Living Conditions
<b>FRA</b>	European Union Agency for Fundamental Rights
<b>GDP</b>	Gross Domestic Product
<b>ILO</b>	International Labour Organization
<b>Ipsos</b>	Ipsos Strategic Marketing
<b>LFS</b>	Labor Force Survey
<b>LGBTI</b>	Lesbian, Gay, Bisexual, Transgender, and Intersex
<b>MKD</b>	Macedonian Dinar
<b>SOGIESC</b>	Sexual Orientation, Gender Identity and Expression, and Sex Characteristics
<b>UB</b>	Unemployment Benefits



# Foreword

For the first time in recent history, we are witnessing the reversal of years of development progress due to the multiple crises the world faces today. All around us, the uneven impact of the crises is in plain sight. From the inability to access vaccines in a timely way to the lack of adequate social protection systems, the poor and vulnerable have been hit the hardest, exacerbating inequality.

With this context, the proliferation of legislation that aims to criminalize or drastically increase criminalization of lesbian, gay, bisexual, transgender, and intersex (LGBTI) people is alarming. As evidenced by World Bank data and data from other development leaders, sexual and gender minorities are already among the most marginalized groups and thus at greater risk of being left behind in the responses to the current overlapping crises. Such discriminatory laws exacerbate homophobia and transphobia and regressive social and gender norms, fueling exclusion and undermining efforts to strengthen social inclusion.

In an effort to reduce discrimination and increase inclusion of sexual and gender minorities, the World Bank has been working to advance policies that aim to prevent discrimination in investment lending, through capacity building of World Bank staff and clients, and through the generation of data and evidence on the development outcomes for LGBTI people. In many countries, however, the lack of data remains a key constraint in the development of more inclusive policies and programs. To address this knowledge gap, the World Bank has committed to develop and fund a new, robust methodology to estimate the cost of exclusion. This methodology and the results from its application in Serbia and North Macedonia are presented in the report “The Economic Cost of Exclusion Based on Sexual Orientation, Gender Identity and Expression, and Sex Characteristics (SOGIESC)”.

This report is the first in a series that will shed light on the discrimination and exclusion LGBTI people face, and the resulting economic impact on the societies in which they live. A primary objective of the research is to provide policymakers, civil society, and development partners in North Macedonia with new data and evidence for strengthening the inclusion of LGBTI people. By looking at the economic costs of SOGIESC-based exclusion in the labor market, we aim to complement and strengthen the discourse and facilitate positive change on these issues.

The World Bank is dedicated to assisting our clients in ending extreme poverty and boost shared prosperity on a livable planet. We recognize that rising inequality and the exclusion of various social groups from services, markets, and opportunities is at odds with this commitment. By constructing socially sustainable communities and societies, in which individuals feel included in the development process and confident in their ability to benefit from it, we can ensure that everyone thrives in the long run. The inclusion of vulnerable groups is crucial not only for building a fair and equitable society, but also because exclusion is costly and impedes a society’s ability to reach its full potential.

If we are to chart a successful course through these challenging times, we must do better and move toward more sustainable and inclusive societies that reduce disparities and foster sustainable growth.

**Antonella Bassani**

Vice President for the Europe and Central Asia  
World Bank



# Acknowledgments

Research on the cost of SOGIESC-based exclusion from the labor market in the Republic of North Macedonia was conducted as a partnership between the World Bank, the LGBTI Equal Rights Association for Western Balkans and Turkey (ERA), Ipsos Strategic Marketing, and the Williams Institute.

The surveys were implemented, and the results analyzed, thanks to the tireless commitment of a team at Ipsos Strategic Marketing, led by Milena Lazic and Vojislav Mihailovic.

ERA was an essential partner in the realization of this research, in particular, Amarildo Fecanji and Biljana Ginova and their network of partners throughout North Macedonia who developed the outreach strategy, conducted the survey in the field, and encouraged people to respond.

Andrew R. Flores from the American University and the Williams Institute was the lead researcher and the central person responsible for the completion of the research.

At the World Bank, the team was led by Dominik Koehler, Leonardo Ramiro Lucchetti, and Clifton Cortez (Task Team Leaders). The team also drew on the expertise of Jovana Djindjic and Lidija Kuzmanov (independent consultants). Patricia Carley provided excellent editorial assistance.

The team is grateful for the advice and guidance received from a number of reviewers and advisers, including M. V. Lee Badgett (University of Massachusetts Amherst), Ari Shaw (Williams Institute), Nevala Sami (FRA), Karel Fric (FRA), Miltos Pavlou (FRA), Sigita Grundiza (EuroStat), Olga Martin Gonzalez (EC DG NEAR), George Perlov (Open for Business), Anna Einarsdottir (University of York), Eric Meerkamper (RIWI Corp), Natalie Shlomo, Ramiro Flores Cruz, and World Bank colleagues Arthur Alik Lagrange, Jose Antonio Cuesta Leiva, Anna Fruttero, Maria Beatriz Orlando, Kristen Himelein, Michael Wild, Renos Vakis, Nicholas Menzies, Natalia Millan, Guy Morel Kossivi Amouzou Agbe, Monica Robayo, Jorge Luis Rodriguez Meza, Rose Mungai, Bojana Naceva, Stephen N. Ndegwa, Varalakshmi Vemuru, Toni Joe Lebbos, Ana Maria Oviedo, Massimiliano Paolucci, Cveta Peruseska-Joncevska, Zurab Sajaia, Sulpice Paterné Mahunan Amonle, Paul Andres Corral Rodas, Paola Marcela Ballon Fernandez, Johannes Widmann, Olivera Kovacevic, Jeffery Tanner, Trang Van Nguyen, Tara Vishwanath, and Salman Zaidi.

The team is also grateful to Jovanco Sapundzioski, Stase Nolev, Ajrija Causoska, and Bojkica Markovska from the State Statistical Office of the Republic of North Macedonia for their guidance.

The team is particularly grateful to Xiaoqing Yu, Country Director for the Western Balkans, and Massimiliano Paolucci, Country Manager North Macedonia, for their leadership and unwavering support for the SOGI inclusion agenda and this research. The team would also like to thank Linda van Gelder, Country Director France, for her support and leadership in the early stages of the research.

All errors are the authors' alone, and the views expressed herein do not represent the position of the World Bank or its Executive Directors.

Funding for this work was generously provided by the Human Rights, Inclusion and Empowerment Trust Fund and Global Affairs Canada.





## Executive Summary

Recent research suggests that the effects of stigma, discrimination, and exclusion against lesbian, gay, bisexual, transgender, and intersex (LGBTI) people could be costing economies billions of dollars.<sup>1</sup>

There are numerous reasons for these costs, including adverse educational environments, employment discrimination, physical and mental health disparities, and violence. Stigma and discrimination may limit the ability of LGBTI people to reach their full potential and the ability of countries to maximize their human capital, even in societies that formally protect LGBTI people.

**The primary objective of this report is to estimate the economic cost of exclusion based on sexual orientation, gender identity and expression, and sex characteristics (SOGIESC) in the Republic of North Macedonia and to provide the country's policy makers, civil society, and development partners with new evidence for the ongoing policy dialogue on strengthening the social inclusion of LGBTI people.** To estimate the cost of exclusion, this report presents two theoretical models focused on the labor market and related issues. The first model centers mainly on the accumulated loss of individual wages due to the consequences of exclusion, which can be divided into three groups: (i) LGBTI people who are employed but not able to use their human capital to the maximum, resulting in reduced wages, (ii) LGBTI people who do not have jobs but are actively seeking work, resulting in increased unemployment, and (iii) LGBTI people who gave up looking for a job and have left the active labor force, resulting in reduced labor force participation or increased inactivity. It is important to consider not only the direct economic losses from lower incomes and labor productivity but also the related costs, such as decreased tax revenues and increased fiscal expenditures on active labor market programs (ALMPs) and unemployment benefits (UB). Therefore, the second model calculates the negative accumulated effect of exclusion on fiscal revenues (due to lower income and payroll taxes) and expenditures (due to higher expenditures for UB and ALMP). This study does not, however, aim to estimate the overall cost of exclusion, as, for instance, it does not examine the disparities in health and education.

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1. M. V. L. Badgett, A. Park, and A. Flores, "Links Between Economic Development and New Measures of LGBT Inclusion" (Los Angeles, CA: Williams Institute, 2018).







**Analyzing the economic cost of exclusion in the Republic of North Macedonia required the generation of new SOGIESC-disaggregated labor market data.** Such data are largely absent in most countries, including the Republic of North Macedonia, and therefore generating this data itself represents an important contribution to further the inclusion of LGBTI people in that country. A representative survey of the general population and of a purposive sample of LGBTI people was conducted in late 2021/early 2022 to document wages and labor force participation, largely relying on the European Union Survey on Income and Living Conditions and the Labor Force Survey in the Republic of North Macedonia, which are regularly conducted by the State Statistical Office of the Republic of North Macedonia.<sup>2</sup> Among LGBTI people, self-reported experiences of discrimination and stigma in the workplace were also collected.

**The main findings from the research suggest that among a wider population of people aged 60 or younger:**

- ✦ The percent unemployed was slightly higher among LGBTI people (13.5 percent) than the general population (12.0 percent), particularly among LGBTI people who experienced higher levels of workplace discrimination and stigma.
- ✦ Among LGBTI people, bisexual and intersex people reported greater experiences of workplace discrimination than others.
- ✦ Wage losses were highest for LGBTI men who reported the most workplace discrimination and stigma, but there were varied patterns among LGBTI women.
- ✦ The annual economic loss due to SOGIESC-based exclusion totaled 3,660,000,000 MKD (US\$64 million), or 0.51 percent of the 2021 GDP in the Republic of North Macedonia.
- ✦ The annual fiscal loss totaled 971,000,000 MKD (US\$17 million), or 0.13 percent of the 2021 GDP.

**The proposed theoretical models and data collection effort provide a way to quantify the cost of SOGIESC-based exclusions and suggest that reducing stigma and discriminatory experiences among LGBTI people can have a significant positive impact on the economy.** This would require, among other measures, the enforcement of existing legal protections against discrimination, a further strengthening of legal protections for LGBTI people in different fields (e.g., education, employment, health, private and family life, etc.), and reductions in the societal stigma faced by LGBTI people.

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2. These surveys do not include information on SOGIESC.





## Introduction

In recent decades, economic and social progress has contributed to a global reduction in poverty and income inequality.

The number of people living in extreme poverty—on less than US\$2.15 per person per day in 2017 purchasing power parity prices—has been steadily declining for over 20 years globally.<sup>3</sup> However, the recent shocks to the global economy resulting from the COVID-19 pandemic and rising energy and food prices have showed that this progress can be easily reversed. In 2020 alone, the number of people living in extreme poverty likely increased by 9 percent.<sup>4</sup> The current crisis will impact the already poor and marginalized disproportionately, threatening to erase decades of progress.

**The World Bank and all its member states are committed to ending extreme poverty while at the same time promoting shared prosperity in a sustainable manner.** These goals will remain far out of reach if the most vulnerable cannot participate in and benefit from the development process. Social inclusion and gender equality play key roles in further reducing poverty and promoting shared prosperity by improving the ability and opportunity of people who are disadvantaged on the basis of their identity to take part in society.<sup>5</sup> Building socially sustainable communities and societies where people feel they are part of development and believe they will benefit from it would enable all people to thrive over time.<sup>6</sup> Inclusion of vulnerable groups is important to building a more just and equitable society, but it is important also because excluding these groups is costly and hinders the ability of a society to achieve its full potential.

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3. World Bank, "Poverty and Shared Prosperity 2022: Correcting Course," (Washington, DC: World Bank, 2022).

4. Ibid.

5. World Bank, "Inclusion Matters: The Foundation for Shared Prosperity," (Washington, DC: World Bank, 2013).

6. P. Barron and others, "Social Sustainability in Development: Meeting the Challenges of the 21st Century," New Frontiers of Social Policy (Washington, DC: World Bank, 2023).



**The effects of exclusion are far reaching and harm individuals and their communities.** Even with formal protections, stigma and discrimination against lesbian, gay, bisexual, transgender, and intersex (LGBTI) people persists. Stigma, prejudice, discrimination, and exclusion of LGBTI people can begin at an early age, and can have many downstream effects on their well-being. Many LGBTI youth face exclusion in school by teachers and other students, which could discourage them from continuing their education and can also reduce the educational value of their years in school.<sup>7</sup> If exclusion and harassment in education prevent LGBTI youth from investing in their human capital (i.e., their knowledge and skills), there may be a reduced likelihood of gainful employment, particularly in higher-skilled jobs,<sup>8</sup> reduced productivity and earnings, and an increased likelihood of poverty.<sup>9</sup> Stigma, prejudice, discrimination, and exclusion of LGBTI people can also lead to poorer physical and mental health, lower life expectancy, and lower labor force participation.<sup>10</sup> In the aggregate, these adverse outcomes result in economic costs, such as higher health care and social protection costs, lower economic output, and fewer incentives to invest in human capital.<sup>11</sup> Indeed, recent research suggests that the effects of exclusion based on sexual orientation, gender identity and expression, and sex characteristics (SOGIESC) could be costing economies billions of dollars,<sup>12</sup> amounting to up to 1.7 percent of their GDP.<sup>13</sup>

The objective of this report is to estimate the economic cost of SOGIESC-based exclusion in the Republic of North Macedonia.

The aim also is to provide the country's policy makers, civil society, and development partners with new evidence for the ongoing policy dialogue on strengthening the social inclusion of LGBTI people. The study does not intend to provide a comprehensive assessment of the societal costs of exclusion in North Macedonia, such as disparities in health care and education. Instead, after engaging in a consultative process with state authorities and LGBTI civil society organizations, the study concentrates on the economic impacts of exclusion within the labor market.<sup>14</sup> The objectives of this analysis are thus to:

1. Expand the evidence base on SOGIESC-based exclusion in North Macedonia's labor market through primary data collection and inform data collection and analysis on LGBTI people
2. Estimate the economic and fiscal costs of exclusion of LGBTI people and start a policy dialogue to strengthen the social inclusion of LGBTI people
3. Complement the human rights dialogue with the socioeconomic development agenda

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7. M. V. L. Badgett, K. Waaldijk, and Y. Van der Meulen Rodgers, "The Relationship between LGBT Inclusion and Economic Development: Macro-Level Evidence," (World Development 120 (2019): 1–14).

8. Ibid.

9. M. Valfort, "LGBTI in OECD Countries: A Review," OECD Social, Employment and Migration Working Paper 198 (Paris: OECD, 2017).

10. OECD "Over the Rainbow? The Road to LGBTI Inclusion," (Paris: OECD, 2020)..

11. Ibid.

12. M. V. L. Badgett, A. Park, and A. Flores, "Links Between Economic Development and New Measures of LGBT Inclusion" (Los Angeles, CA: Williams Institute, 2018).

13. See UNAIDS, "The Economic Costs and Development Impact of Exclusion of LGBT People," March 14, 2014, <https://www.unaids.org/en/resources/presscentre/featurestories/2014/march/20140314homophobia>.

14. This report's focus on the economic consequences of LGBTI exclusion stands alongside human rights frameworks that make complementary arguments for the full inclusion of LGBTI people in society.





# LGBTI Exclusion in the Republic of North Macedonia

Since 2017, important legal and policy reforms that protect and promote the rights of LGBTI people have been introduced in the Republic of North Macedonia, but the effective implementation of legislation remains a challenge.

The European Commission Progress Report for North Macedonia for 2022 noted that the promotion of equality and the condemnation of hate speech, hate crimes, discrimination, and intolerance against LGBTI people should be systematic, and that additional efforts are needed to protect LGBTI people and ensure that they can exercise their rights.<sup>15</sup>

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15. EC, "Commission Staff Working Document – North Macedonia 2022 Report," (Strasbourg: European Commission, 2022).





Discrimination and violence based on SOGIESC in North Macedonia are perceived as common by members of the public. A public opinion poll conducted by the LGBTI Equal Rights Association for Western Balkans and Turkey (ERA) at the beginning of 2023 showed that 40 percent of respondents thought that psychological violence toward LGBTI people is frequent, and 30 percent thought that LGBTI people are regularly exposed to physical violence.<sup>16</sup>

**Labor market discrimination is also common for LGBTI people in North Macedonia, especially for those who are employed, and data suggest that many LGBTI people are not open about their SOGIESC at work.** Data collected by the European Union Agency for Fundamental Rights (FRA) in 2019 indicated that 13 percent of North Macedonia's LGBTI respondents felt discriminated against when looking for a job in the previous year, and 25 percent experienced discrimination at work due to being LGBTI.<sup>17</sup> Almost half (46 percent) of respondents reported hiding being LGBTI at work, while 46 percent were selectively open about their SOGIESC.<sup>18</sup> The lack of legal gender recognition makes transgender people particularly vulnerable to discrimination and exclusion, 28 percent of them felt discriminated against when looking for a job in the previous year.<sup>19</sup> According to the findings of a 2018 World Bank survey, 46 percent of LGBTI respondents from North Macedonia had heard or seen negative comments about or conduct against their colleague because they were perceived to be LGBTI.<sup>20</sup>

**The LGBTIQ Employment Equality Index was introduced in North Macedonia in 2017 by the Headhunter Group, a recruitment and human resource company, to rank companies based on their protection and support of the rights of LGBTI job seekers and employees.** The 2020 Index is based on a survey conducted among 70 companies and organizations in North Macedonia from a variety of industries. The overall results of the survey showed that companies in North Macedonia still have much to do in the direction of human resource policies and practices to protect and uphold the rights and dignity of minority job seekers and employees.<sup>21</sup> All of these findings point to the pressing need for concerted efforts to foster greater inclusion of LGBTI individuals in North Macedonia, ensuring that they fully enjoy their human rights and can positively contribute to society and the economy.



16. ERA, "Attitudes towards LGBTIQ+ People in the Western Balkans. Public Opinion in Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia, and Serbia," (Belgrade: LGBTI Equal Rights Association for the Western Balkans and Turkey, 2023).

17. EU Agency for Fundamental Rights (FRA), "Survey on Experiences of LGBTI People in Europe," LGBTI Survey Data Explorer, <https://fra.europa.eu/en/data-and-maps/2020/lgbti-survey-data-explorer>.

18. Ibid.

19. Ibid.

20. World Bank, "Life on the Margins: Survey Results of the Experiences of LGBTI People in Southeastern Europe" (Washington, DC: World Bank, 2018).

21. The Headhunter Group, "LBGT+ Employment Equality Index – 2020 Annual Report of Findings: North Macedonia February 2021," (Tirana: Headhunter Group, 2021).





# Methodology & Demographics

This report assesses the economic costs of excluding LGBTI people from the labor market by combining two simple bottom-up models.

The first model estimates the accumulated wage losses due to the consequences of exclusion, including costs stemming from (i) the reduced wages of working-age LGBTI people who are not able to use their human capital to the maximum, (ii) the increased unemployment of LGBTI people, and (iii) their reduced participation in the labor market. It is based on a model developed by the International Labour Organization (ILO) for estimating the cost of exclusion of people with disabilities.<sup>22</sup> Since this model does not take into consideration other potential costs, such as higher government expenditures, the second model adapts a World Bank framework, originally employed to estimate the costs of Roma exclusion from the labor market, to estimate the fiscal loss due to SOGIESC-based economic exclusion.<sup>23</sup>

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22. S. Backup, "The Price of Exclusion: The Economic Consequences of Excluding People with Disabilities from the World of Work," Employment Sector Working Paper 43 (Geneva: International Labour Organization, 2009).

23. World Bank, "Roma in Serbia – A Generation of Opportunities. The Economic and Fiscal Benefits of Roma Inclusion in the Western Balkans," (Washington, DC: World Bank, 2015), unpublished.



**Bearing in mind that the models are based on a comparison of the labor market outcomes of LGBTI people and the general population, data on gross wages and employment status from both populations were necessary.** The fiscal loss calculation further required net labor incomes. To avoid any exogenous factors that could impact the results (e.g., timing of the survey, survey vendor, data interview method, different questionnaires, among others), nearly identical online surveys for LGBTI people and for the general population were conducted to obtain the necessary data.<sup>24</sup>

**The data collection was led by Ipsos, in partnership with the World Bank, the Williams Institute, and LGBTI Equal Rights Association for the Western Balkans and Turkey (ERA).** Incomes and employment activity in the questionnaire largely relied on the European Survey on Income and Living Conditions (EU-SILC) and the Labor Force Survey (LFS).<sup>25</sup> The survey instrument (see Annex 1) was developed in close collaboration with ERA and LGBTI civil society organizations in North Macedonia. Ipsos fielded the general population survey to empaneled members of its survey pool, which is designed to be a representative sample of adults in North Macedonia. Ipsos also hosted the LGBTI survey online with a unique link for access. Participants were recruited using an outreach strategy developed by ERA and its national member organizations. Since the LGBTI population is considered hard to reach, participants were recruited through purposive methods to participate in the online survey. The sample was not probabilistic and is not necessarily representative of the LGBTI population in North Macedonia, but the study followed best practices as it relates to sampling hard-to-reach populations.<sup>26</sup> Respondents were classified as LGBTI if they had identities, attractions, or behaviors that indicated they were LGBTI.

**The demographics of the LGBTI sample, general population, and matched general population<sup>27</sup> are provided in Annex 2.** For the LGBTI sample, people were categorized by their sexual orientation, gender identity, and intersex status. The results were reported only for larger subgroups of LGBTI people.<sup>28</sup>

**LGBTI respondents were younger, more highly educated, more urban, and more likely to reside in the Skopje region than the general population.** These demographic differences are similar to findings in other studies but may be attributable to both compositional differences between the LGBTI population and the general population, as well as the data collection method and outreach strategy used to recruit LGBTI participants. Thus, estimates of LGBTI people should be interpreted as better-case results, where outcomes and demographic differences could be different for LGBTI people who were not reached by the survey.

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24. Alternatively, a single survey could have been conducted to capture the characteristics of the LGBTI population and could have been compared with the European Survey of Income and Living Conditions and the Labor Force Survey conducted by the Statistical Office for the entire population on a regular basis. However, comparability could have been compromised for the reasons stated.

25. Since the survey was designed to be shorter than the EU-SILC and LFS, the estimates of income and employment status presented in this report might differ from official statistics.

26. J. Wagner and S. Lee. "Sampling Rare Populations," in *Health Survey Methods*, ed. Timothy P. Johnson (New York: Wiley, 2014).

27. The matched general population approximates the characteristics of the LGBTI sample.

28. If a person was intersex, they were categorized as such. If a person indicated they were transgender but not intersex, they were categorized as transgender, including those who were gender non-binary. The remaining respondents were grouped by sexual orientation.



# Experiences of Workplace Discrimination and Exclusion among LGBTI People

The findings show significant levels of workplace discrimination in the Republic of North Macedonia.

Surveyed LGBTI people were asked to describe their experiences of workplace discrimination and exclusion. About 13.5 percent of the LGBTI sample had experienced workplace discrimination in hiring, firing, professional advancement, salary, tasks, and other job-related situations within the past five years, and 9 percent had experienced this type of discrimination in the past year. About 9 percent of the LGBTI sample had quit a job due to SOGIESC-based discrimination and 7 percent had taken a leave of absence for the same reasons. About 51 percent of the LGBTI sample reported hiding their LGBTI status at work often or always. Workplace experiences of verbal harassment about SOGIESC directed at oneself or at other colleagues were less frequent, with 13 percent reporting often or always encountering verbal harassment directed against oneself, and 37 percent reporting this harassment directed at others.

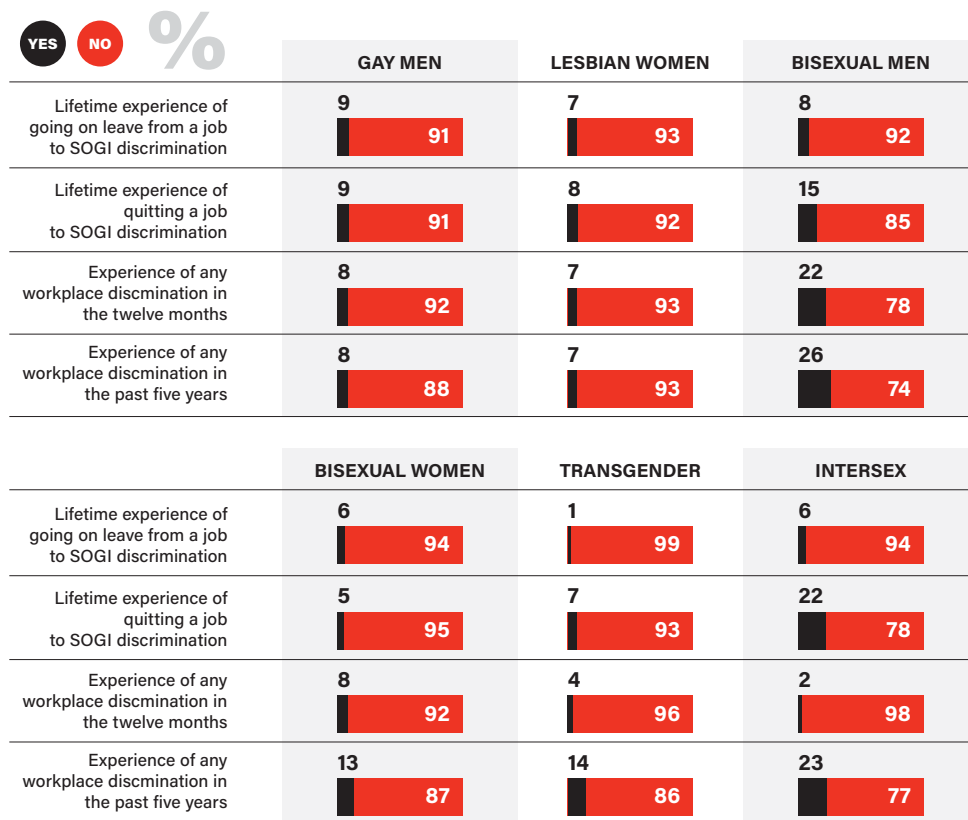
**Bisexual men and intersex persons reported more workplace discrimination and adverse workplace experiences.** Figure 1 summarizes the experiences of workplace discrimination broken down by LGBTI subgroups. Although lesbian, gay, bisexual women, and transgender participants reported experiences similar to the whole LGBTI group, bisexual men disproportionately reported workplace discrimination and lifetime experiences of quitting a job due to workplace discrimination. One in four intersex participants reported experiencing workplace discrimination in the past five years. Figure 2 shows that bisexual men tend to report greater frequency of adverse workplace experiences relative to other LGBTI subgroups.

**These indicators of workplace discrimination and exclusion were combined to create a discrimination scale.** The study used responses to develop a scale of adverse workplace experiences to create three equal-sized groups to represent those with low, moderate, and high levels of experiences with workplace discrimination. These three groups were then used to estimate the economic cost of SOGIESC-based exclusion.

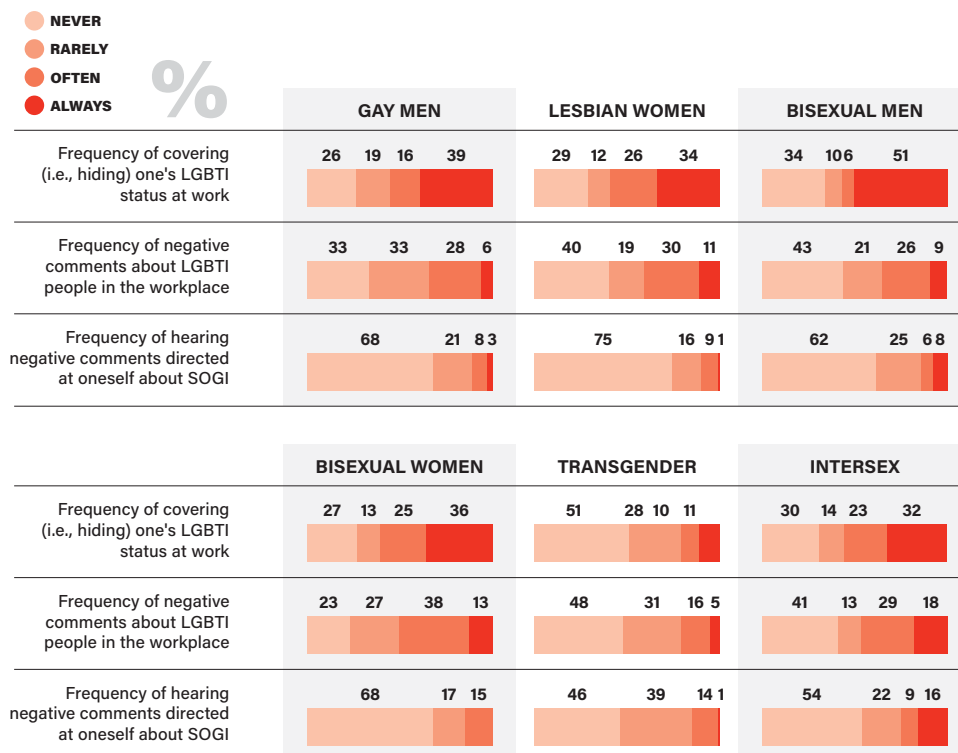




**Figure 1. Experiences and Effects of Workplace Discrimination and Exclusion by LGBTI Subgroup**



**Figure 2. Frequency of Adverse Workplace Experiences by LGBTI Subgroup**



NOTE: Numbers may not add to 100 due to rounding.

# The Economic and Fiscal Cost of SOGIESC-based Exclusion

The building blocks of the first theoretical model of the cost of exclusion include employment activity and inactivity, as well as income of the general population and LGBTI people by gender.<sup>29</sup>

The model further stratifies the LGBTI sample by their experiences of discrimination to estimate the cost of exclusion. Table 1 documents these variables by gender. Among men, median gross annual earnings were about 372,993 MKD (US\$6,547), and among women, 327,137 MKD (US\$5,742). These are similar to the official tabulations of the North Macedonia Statistical Office.<sup>30</sup> Activity and inactivity observed for men were also similar to those of the Statistical Office.<sup>31</sup> Among women, the study estimated that about 48 percent were employed, 14 percent unemployed, and about 38 percent inactive. The Statistical Office reported that 46 percent of women aged between 15 and 64 were employed, 8 percent unemployed, and 47 percent inactive in 2021.<sup>32</sup> Slight differences might be attributed to the different time frames, questionnaire format, and age ranges included, among other reasons.

**Table 1 also summarizes the median incomes and employment activity for the LGBTI sample broken down by current gender and discrimination strata.** Overall, the study found that 73.8 percent of LGBTI people were employed, 13.5 percent unemployed, and 12.7 percent inactive.<sup>33</sup> Earnings tended to be lower, and rates of unemployment higher, for those in higher discrimination strata than those in lower discrimination strata.

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29. A limitation of the theoretical model is that a cost cannot be derived for gender non-binary LGBTI people, as there is not a reference group in the general population. Future examinations of the theoretical model should consider the extent to which gender-based analyses affect the cost of exclusion estimate and what a baseline reference group would be for those who are non-binary.

30. The Statistical Office estimates average annual incomes in 2021 to be 514,644 MKD (US\$9,033).

31. Statistical Office, 2021. <https://makstat.stat.gov.mk/PXWeb/pxweb/en/MakStat/?rxid=46ee0f64-2992-4b45-a2d9-cb4e5f7ec5ef>

32. Ibid.

33. Since the sampling strategy for the LGBTI sample was purposive, it is not appropriate to directly compare incomes of the LGBTI sample to the general population. The compositional differences between the LGBTI sample and the general population likely impact earnings.



**Table 1. Median Gross Annual Incomes and Labor Activity for the General Population and the LGBTI Sample by Levels of Discrimination (aged 60 and younger)**

Group	Median Gross Income (MKD) <sup>a</sup>	$\beta$	Employed (%)	Unemployed (%)	Inactive (%)
<b>Men</b>					
General Population	372,993		68.2	10.2	21.6
LGBTI Sample	521,852		76.2	14.1	9.6
Discrimination Level					
None <sup>b</sup>	539,439	1	79.7	14.3	6.0
Low	511,976	0.95	74.3	11.3	14.4
Moderate	555,179	1.03	79.7	14.0	6.3
High	476,105	0.88	74.0	17.5	8.5
<b>Women</b>					
General Population	327,137		47.6	14.0	38.4
LGBTI Sample	533,856		70.6	12.8	16.5
Discrimination Level					
None <sup>b</sup>	426,939	1	71.6	13.9	14.5
Low	598,458	1.40	64.1	9.9	25.9
Moderate	476,479	1.12	73.8	14.2	12.0
High	486,356	1.14	73.8	14.3	11.9

<sup>a</sup> Only of earners in the past year. All estimates are of those aged 60 or younger. FRA weights are applied to the LGBTI sample.

<sup>b</sup> These estimates were derived from the weighted general population after matching on the background characteristics of the LGBTI sample.

**There is an estimated total economic loss of 3,660,000,000 MKD (US\$64 million) annually, or 0.51 percent of North Macedonia's GDP.** The elements of the cost of SOGIESC-based exclusion are combined to provide an overall estimate of economic loss in Table 2. These estimates assumed that LGBTI people comprise 7.68 percent of the adult population.<sup>34</sup> Among men, the study estimated that there was an economic loss of 2,712,000,000 MKD (US\$47.6 million) due to the cost of SOGIESC-based exclusion. Among women, the estimated economic loss was 948,000,000 MKD (US\$16.6 million). The study found that varying the size of the LGBTI population from 3 to 15 percent (not shown in the table) results in a range of costs from 1,430,000,000 MKD (US\$25 million) to 7,148,000,000 MKD (US\$125 million). Furthermore, some LGBTI people, particularly those facing lower levels of discrimination, reported higher wages and lower unemployment rates. This suggests a potential economic gain resulting from reduced discrimination, and highlights the potential economic benefits of implementing stronger inclusion policies.

34. European Union Agency for Fundamental Rights (FRA), "A Long Way to Go for LGBTI Equality - Technical Report," (Luxembourg: Publications Office of the European Union, 2020).



**Table 2. Economic Loss Estimates due to SOGIESC-Based Exclusion (aged 60 and younger)**

	Discrimination Level		
	Low	Moderate	High
	<b>Men</b>		
Percent of people in group	33.0	37.4	29.6
Number of people in group <sup>a</sup>	28,469	32,265	25,536
Loss productivity adjustment factor ( $\gamma_i^l$ )	0.121	0.003	0.146
Gain productivity adjustment factor ( $\gamma_i^g$ )	-0.029	-0.025	0.00
$P * n_i * \gamma_i^l$ (millions)	1,285	36	1,391
$P * n_i * \gamma_i^g$ (millions)	308	301	0
<b>Total economic loss (MKD millions)</b>	<b>2,712</b>		
	<b>Women</b>		
Percent of people in group	32.8	32.5	34.6
Number of people in group <sup>a</sup>	23,906	23,687	25,218
Loss productivity adjustment factor ( $\gamma_i^l$ )	0.114	0.003	0.004
Gain productivity adjustment factor ( $\gamma_i^g$ )	-0.296	-0.114	-0.129
$P * n_i * \gamma_i^l$ (millions)	892	23	33
$P * n_i * \gamma_i^g$ (millions)	2,315	883	1,063
<b>Total economic loss (MKD millions)</b>	<b>948</b>		
	<b>Men and Women Combined</b>		
<b>Total economic loss (MKD millions)</b>	<b>3,660</b>		

<sup>a</sup> Assuming that 7.68 percent of the North Macedonia population is LGBTI.

**The second theoretical model aims to estimate the fiscal loss.** Based on official data obtained from the country's National Employment Services report for 2020, the average annual unemployment benefit was 120,898 MKD per beneficiary, and the average annual active labor market programs expense was 116,050 MKD. The fiscal loss model then sums these expenditures and multiplies it by the difference in the share of the unemployment between the LGBTI sample and the general population. The study does not find additional expenditure losses, as the percent unemployed among LGBTI men and women was slightly lower than the matched men and women in the general population. Combining the estimated revenue and expenditure losses and weighting that by the size of the LGBTI population, the study estimates that fiscal losses total 971,000,000 MKD (US\$17 million) annually, or 0.13 percent of GDP.

**The two theoretical models show different elements of the economic cost of SOGIESC-based exclusion that harms the Republic of North Macedonia's economy.** The study findings suggest that wage losses vary by subgroups of individuals who self-report experiences of workplace discrimination and adverse workplace experiences. Adding to that, the higher percentage of LGBTI people who are inactive contributes to both wage losses. Thus, North Macedonia's economy is estimated to lose millions related to SOGIESC-based exclusion. Figure 3 puts all the elements together to highlight how the various experiences of stigma, prejudice, discrimination, and exclusion have downstream consequences on human capital that, in the aggregate, result in economic and fiscal losses.<sup>35</sup>

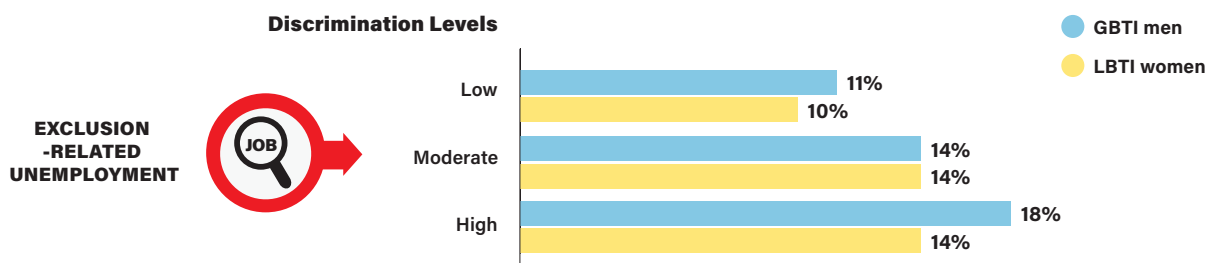
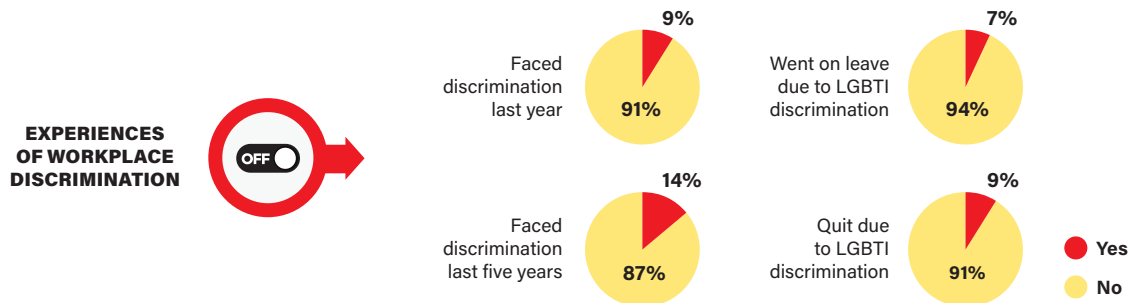
35. Some portion of the elements of the first cost model shares some of the estimated costs of the second cost model. Thus, it is not appropriate to combine these two cost estimates.





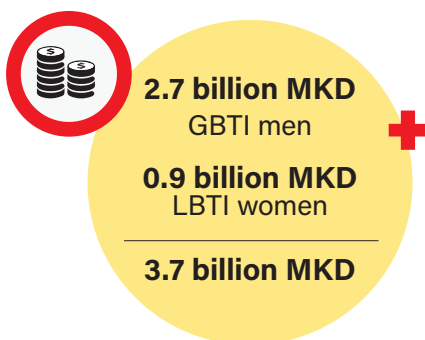
**Figure 3. The Economic and Fiscal Cost of SOGIESC-based Exclusion**

## Understanding wage loss in North Macedonia



## Total economic and fiscal cost of LGBTI exclusion

### ANNUAL WAGE LOSS

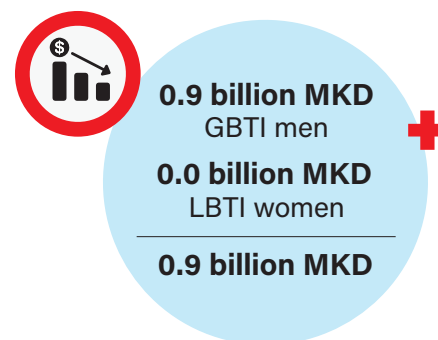


Wage loss due to LGBTI exclusion equals

**0.5%**

of the 2021 GDP in the Republic of North Macedonia

### ANNUAL FISCAL LOSS



Fiscal loss due to LGBTI exclusion equals

**0.1%**

of the 2021 GDP in the Republic of North Macedonia

# Conclusion

A nation's economy can be adversely affected by stigma and discrimination against LGBTI people.

There are many plausible theoretical mechanisms that explain how economies can be affected. Previous research clearly demonstrates theoretically and empirically how economies can lose because members of society are kept from their full potential<sup>36</sup>. LGBTI people are one such group where persistent stigma, prejudice, and discrimination may keep them from reaching their full human capital.<sup>37</sup> This study develops two theoretical models to quantify the economic and fiscal losses that result from excluding LGBTI people from the workforce and shows that the economy of the Republic of North Macedonia is losing out due to SOGIESC-based discrimination and exclusion in the labor market.

**A commitment to end extreme poverty and promote shared prosperity needs to consider marginalized segments of society.** Exclusion of some marginalized groups like LGBTI people may be entrenched such that economic development does not benefit them. In turn, failing to include all groups in the development process is costly and limits the ability of whole societies to achieve their full potential. The study findings for North Macedonia show that LGBTI people with more adverse workplace experiences are economically less well-off and more likely to be unemployed, evidencing the cost of SOGIESC-based exclusion. They further suggest that some LGBTI people who face fewer experiences of workplace discrimination and exclusion can actually benefit economies. Thus, building more inclusion could enhance North Macedonia's economic well-being.

**The findings presented here contain limitations.** The purposive sampling strategy for the LGBTI sample means that the extent to which the results are generalizable to all LGBTI people in the Republic of North Macedonia is unknown. It is likely that some of the most vulnerable LGBTI people were not reachable and thus not able to participate in the survey (e.g., individuals who lack access to the internet, reside in more rural locations, and/or lack stable housing or employment). The cost estimates may then be a lower bound of what may be a much higher cost, especially when taking into consideration the costs associated with discrimination in education, health, and other areas of life.

**There is ample opportunity for future research on the cost of excluding marginalized groups.** The theoretical models presented here do not provide a method to estimate the cost of exclusion for those who are gender non-binary, for example, and thus future work should develop models that are neutral with respect to gender. Further, the model could be extended to consider multiple axes of exclusion that may better characterize a person's economic and social well-being. This research also provides avenues for showing the benefits of creating supportive workplace environments, and these cost models also indicate what government and society can gain from being more inclusive of marginalized populations. The theoretical models presented in this report and implemented as part of the study can serve as useful starting points for these future endeavors.

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36. World Bank, "Inclusion Matters: The Foundation for Shared Prosperity," (Washington, DC: World Bank, 2013).

37. OECD, "Over the Rainbow? The Road to LGBTI Inclusion," (Paris: OECD, 2020).



# Recommendations

One of the primary objectives of this research was to provide North Macedonia's policy makers, civil society, and development partners with new data to strengthen the inclusion of LGBTI people.

North Macedonia, as a candidate for EU membership, has agreed to key reforms as part of the EU accession charter, and in its 2022 accession report, the European Commission pointed out that “despite having a legal framework that protects against discrimination and hate crime on the grounds of sexual orientation and gender identity, the implementing these laws remains challenging.”<sup>38</sup> Therefore, additional efforts are required to meet the requirements set forth in Chapters 23: Judiciary and Fundamental Rights, and Chapter 24: Justice, Freedom, and Security of the *acquis* for accession. Although important progress has been made, the data presented in this report show that more work is needed to ensure non-discrimination becomes a lived reality for LGBTI people in North Macedonia. This research for the first time puts a price on SOGIESC-based discrimination and exclusion in North Macedonia, providing additional incentives to promote an inclusive and equitable society. The research identifies three primary areas for action as described below:

## 1 Collect SOGIESC-disaggregated data.

**The LGBTI data gap remains large, and further research and data collection efforts are necessary to better understand the lived experience of LGBTI people and the challenges they face in different domains (e.g., employment, education, health, etc.).** The State Statistical Office of the Republic of North Macedonia should, in partnership with LGBTI civil society organizations, development partners, and experts, explore ways in which official surveys could begin to collect SOGIESC-disaggregated data in a safe, secure, and inclusive manner. Although this research adds to a growing dataset on the lives of LGBTI people, systematic and recurrent data collection by the State Statistical Office and other relevant institutions is essential to informing policy making and assessing the effectiveness of policies over time.

**Particular attention is required to ensure that non-binary, transgender, and intersex people, as well as LGBTI people with multiple intersecting marginalized identities, form part of future data generation efforts.** This research has shown that bisexual, transgender, and intersex people face unique challenges, but it also demonstrates the difficulty in reaching them as part of these kinds of data gathering activities. It is therefore necessary to develop not only inclusive instruments for collecting data but also new approaches to contacting hard-to-reach LGBTI subgroups.

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38. EC, “Commission Staff Working Document – North Macedonia 2022 Report,” (Strasbourg: European Commission, 2022).





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### Box 1. Collecting SOGIESC-Disaggregated Data: Emerging Practices

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Data on the lived experiences of LGBTI people are lacking globally, including in North Macedonia, limiting governments' ability to develop effective and targeted policy responses to address discrimination and exclusion. However, gathering such data is challenging for several key reasons.

As extensive literature has documented, LGBTI people worldwide face stigmatization, discrimination, and exclusion in everyday life, so they often decide not to be open about their identity. Data collection efforts that rely on face-to-face methods where respondents need to disclose their SOGIESC to an enumerator might lead to extensive underreporting, especially in situations where LGBTI people face extensive discrimination or when they doubt the confidentiality of the gathered data. Despite these challenges, an increasing number of statistical agencies are including SOGIESC-identifying questions in household surveys or censuses, for example in Argentina (2022), Ecuador (2022), or the United Kingdom (2021). FRA and the World Bank have successfully implemented large-scale online surveys of LGBTI people in the EU and the Western Balkans. Although these online surveys rely on a non-probabilistic convenient sample and cannot be considered representative, they provide important insights into the lives of LGBTI people. Regardless of the survey instrument, some key considerations to bear in mind are:

- 1. Use inclusive language:** Use language that is inclusive of all sexual orientations and gender identities and expressions, and avoid using binary or heteronormative assumptions.
- 2. Provide clear definitions:** Provide clear definitions of all terms to ensure that respondents understand the questions and can answer them accurately.
- 3. Ensure confidentiality:** Ensure that the data collected are kept confidential and that LGBTI individuals are not at risk of discrimination or persecution as a result of their responses.
- 4. Conduct outreach:** Work directly with local LGBTI organizations to encourage participation and ensure that respondents are aware of the purpose and importance of the questions.
- 5. Test questions:** Test questions with LGBTI individuals and organizations to ensure that they are clear, relevant, and respectful.

## 2 Effectively implement existing non-discrimination legislation.

**The legislative framework for protecting the rights of LGBTI people in the labor market in North Macedonia is largely in place, but additional efforts toward the consistent and effective implementation of legislation are still needed.** The Law on Protection and Prevention of Discrimination recognizes sexual orientation and gender identity as protected grounds of discrimination in different fields, including employment. Also, the Law on Labor Relations, the key policy in the domain of labor, prohibits discrimination based on sexual orientation and “other personal qualities” that can refer to gender and gender identity. However, the current data indicate the disparity between legal protections and the lived experiences of LGBTI people in the labor market. Additional meaningful efforts are required to ensure the full implementation of existing legal protections, and a thorough assessment of the relevant laws and policies is encouraged to close the legal gaps that might encourage discrimination and exclusion of LGBTI people.

**The Strategy for Equality and Non-discrimination for the period 2022–2026 identifies LGBTI people, among other groups, as vulnerable to discrimination and defines measures to promote equality in different fields, including work and labor relations.** However, LGBTI people are explicitly listed only within the measure concerning the prevention of hate speech, violence, and other forms of discrimination. The National Action Plan on the Rights of LGBTI People, which has been in preparation for several years, has still not been adopted. Fostering inclusive and equitable societies for all requires a concerted effort by the state across all sectors. The anti-discrimination strategy and action plan can play an important role, but adequate budget and ongoing monitoring are required to ensure their effective implementation. In addition, the government should consider reviewing existing reporting mechanisms and strengthening their effectiveness to ensure that they are accessible for LGBTI people and that they resolve cases without fear of exposure, retaliation, or further discrimination.

## 3 Make workplaces LGBTI friendly.

**Hostility toward LGBTI people in the labor market is costly for the economy and harmful to employers.**<sup>39</sup> As the existing research suggests, companies that have employee-friendly policies and practices experience various benefits, including better financial performance, stronger competitiveness in the labor market, and the increased engagement and motivation of employees.

**In order to meet legal responsibilities but also improve competitiveness and attract and retain the best possible talent, employers need to make their selection processes and workplaces inclusive for LGBTI people.** Therefore, the institutions in North Macedonia in charge of human resource management and development in public administration at the national and local levels, including the Ministry of Information Society and Administration, the Agency for Administration, the Academy for Professional Development of Administrative Officers, and the Macedonian Chamber of Commerce, can play an important role in promoting workplace diversity and SOGIESC inclusion.

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39. J. Miller and L. Parker, “Open for Business – Strengthening the Economic Case,” (London: Open for Business, 2018).





# Annex 1

## Data and Questionnaire

The following link provides access to the questionnaire and the datasets used for this analysis:  
<https://www.worldbank.org/en/region/eca/publication/economic-cost-of-exclusion-lgbti>.

# Annex 2

## Demographics

**Table A2.1.** Demographics of LGBTI Sample and General Population (aged 60 and younger)

	Under 60		Matched (under 60) <sup>a</sup>	
	LGBTI (n = 714)	General Population (n = 704)	LGBTI (n = 706)	General Population (n = 704)
<b>LGBTI Group</b>				
Gay Men	32.5%	--	33.0%	--
Lesbians	17.6%	--	17.7%	--
Bisexual Men	12.9%	--	13.1%	--
Bisexual Women	19.2%	--	19.5%	--
Transgender	15.6%	--	14.6%	--
Intersex	2.1%	--	2.1%	--
<b>Age</b>				
18–29	39.4%	27.8%	39.9%	39.6%
30–44	53.8%	39.7%	53.2%	53.2%
45–60	6.8%	32.4%	6.9%	7.2%
<b>Current Gender Identity<sup>b</sup></b>				
Man	53.5%	51.2%	54.2%	53.7%
Woman	45.2%	48.8%	45.8%	46.3%
Non-binary/Refused	1.4%	--	--	--
<b>Educational Attainment</b>				
Lower	5.9%	28.0%	6.0%	2.9%
Secondary	30.0%	52.9%	29.4%	33.0%
Higher	64.1%	19.0%	64.6%	64.0%
<b>Urbanicity</b>				
Urban	70.5%	29.6%	70.1%	70.0%
Suburban	4.7%	5.1%	4.7%	4.3%
Small Town	20.9%	31.9%	21.2%	21.1%
Rural	4.0%	33.4%	4.0%	4.7%
<b>Region</b>				
Eastern	5.4%	7.1%	5.5%	5.8%
Northeastern	2.8%	7.3%	2.9%	3.2%
Pelagonia	6.8%	14.9%	6.9%	8.9%
Polog	2.4%	17.2%	2.5%	2.6%
Skopje	70.4%	29.5%	70.1%	67.9%
Southeastern	4.2%	7.3%	4.3%	3.7%
Southwestern	3.0%	8.5%	3.0%	3.0%
Vardar	5.0%	8.2%	5.1%	5.1%

Note: Not all percentages may add up to 100 due to rounding.

<sup>a</sup> Since the matching method considers a respondent's gender in the LGBTI sample and sex in the general population, respondents who are gender non-binary are excluded in the matched analysis.

<sup>b</sup> Respondent's sex is reported for the general population.



**The matched general population approximates the characteristics of the LGBTI sample.** Table A2.1 also documents the demographics of the LGBTI sample and the general population when the latter is re-weighted to match the characteristics of the LGBTI sample. These weights minimize the differences observed between the LGBTI sample and the general population, particularly for age, educational attainment, urbanicity, and region of residence in the country. For the theoretical models, the matched estimates of the general population were used to approximate productivity levels and the ILO status of LGBTI people had they not been LGBTI.

**Table A2.2 documents the demographics of the LGBTI respondents by LGBTI subgroup.** Bisexual women and men tended to be younger than other LGBTI groups. Transgender and intersex people had lower levels of educational attainment than other LGBTI subgroups. All LGBTI respondents tended to reside in urban centers, and most LGBTI respondents resided in Skopje.

**Table A2.2** Demographics of LGBTI Sample by LGBTI Subgroup (aged 60 and younger)

	Gay Men (n = 184)	Lesbians (n = 70)	Bisexual Men (n = 41)	Bisexual Women (n = 82)	Trans People (n = 40)	Intersex People (n = 29)
<b>Age</b>						
18–29	34.7%	36.9%	46.8%	53.9%	29.4%	30.7%
30–44	59.5%	51.3%	42.1%	46.2%	64.3%	51.4%
45–60	5.8%	11.9%	11.1%	0%	6.3%	17.9%
<b>Educational Attainment</b>						
Lower	1.2%	5.4%	0%	0%	29.0%	1.7%
Secondary	23.4%	25.6%	32.6%	31.4%	41.0%	59.6%
Higher	75.4%	69.0%	67.4%	68.6%	30.0%	38.7%
<b>Urbanicity</b>						
Urban	72.9%	80.9%	58.2%	65.1%	72.5%	56.2%
Suburban	2.0%	3.4%	12.7%	1.9%	8.8%	1.7%
Small Town	19.3%	13.6%	27.3%	26.7%	18.8%	29.8%
Rural	5.7%	2.1%	1.8%	6.4%	0%	12.3%
<b>Region</b>						
Eastern	4.1%	3.1%	0%	11.9%	7.6%	1.7%
Northeastern	1.2%	2.1%	0%	7.3%	2.5%	12.3%
Pelagonia	8.6%	6.5%	9.0%	5.6%	2.5%	10.6%
Polog	2.9%	0%	7.2%	1.9%	1.2%	0%
Skopje	71.2%	79.2%	69.1%	58.8%	77.6%	47.2%
Southeastern	1.2%	3.1%	1.8%	8.2%	8.8%	3.4%
Southwestern	4.5%	2.1%	5.5%	0.9%	0%	10.6%
Vardar	6.2%	4.1%	7.3%	5.4%	0%	14.0%



