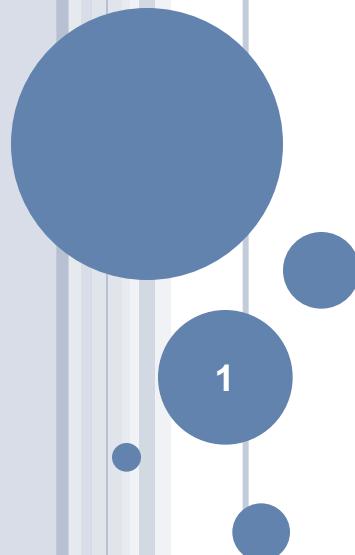




# PUBLIC OPINION IN KOSOVO BASELINE SURVEY RESULTS NOVEMBER, 2010



# METHODOLOGY

- Quantitative research using face-to-face method within household
- Sample size n=1500 respondents age 18+ throughout Kosovo
- Stratified Random Sample (by region, settlement type, gender and ethnicity)
  - Random walk technique, using every third house on the left side of the street
  - Random selection of respondent within HH using next birthday
- Data Collection Time Period: November 8 – 15, 2010
  - Interviewing began on Nov. 5. However, one political party changed leadership on November 7<sup>th</sup> and the fieldwork restarted on November 8<sup>th</sup> with a revised questionnaire.
- Margin of error for the full sample is +/- 2.5% at the 95% confidence level, while findings that pertain to subgroups are subject to a higher margin of error.

# SAMPLE DEMOGRAPHICS

- 53% Male, 47% Female
- 67 % Kosovo Albanians, 19% Kosovo Serbs, 14% Kosovo Other Minority
  - Serbs and other minorities were oversampled to make findings pertaining to those populations statistically reliable. For analysis the sample is weighted to reflect the best projected breakdown of the overall population (K-Alb 92%, K-Serb 5.3%, and Other Minorities 2.7%)
- 38% Employed, 22% Unemployed, 39% Other
  - Other includes retirees, students and housewives

# OVERVIEW

The Baseline Survey was designed to measure the attitudes of the Kosovo population regarding the direction of life in Kosovo, public priorities, public figures, governing and political institutions, vote intentions and selected policy matters in advance of the extraordinary election scheduled for December 12, 2010.

The data reveal a population roughly divided as to the general direction of life in Kosovo, somewhat satisfied with Kosovo's progress since independence was declared in February of 2008 and fairly optimistic about the year ahead.

Jobs (economic development) and corruption are cited overwhelmingly as the most important problems facing Kosovo.

While respondents evince some satisfaction with progress on secondary issues such as health care and education, no such satisfaction exists regarding efforts to combat corruption, and very little with the management of the economy and creation of jobs.

# OVERVIEW

Regarding the performance of Kosovo's public institutions (the Government, National Assembly, Political Parties and NGOs/CSOs), Albanian respondents were most satisfied with NGOs/CSOs and least satisfied with the Kosovo Government.

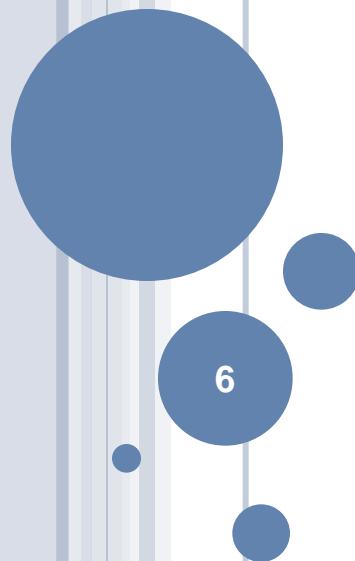
Kosovo Serbs had a negative view of all institutions, but, in a subsequent question, 90% of Serbs agreed with Albanians and other minorities that NGOs and CSOs have an important role in helping Kosovo progress toward a better future.

Almost nine-in-ten respondents said they will definitely or probably vote in the parliamentary elections. While this is almost certainly an overstatement, it also indicates significant interest in the election. Over half expressed at least some interest in participating in campaign activities if they were invited to do so.

An overwhelming majority of Kosovars (of both genders) view it as important to have more women in the Kosovo National Assembly.

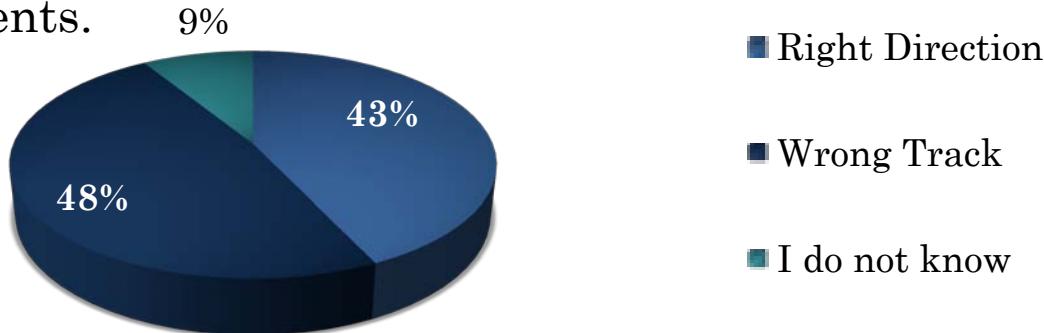


# KOSOVO'S DIRECTION AND KEY ISSUES



# GENERAL DIRECTION OF KOSOVO

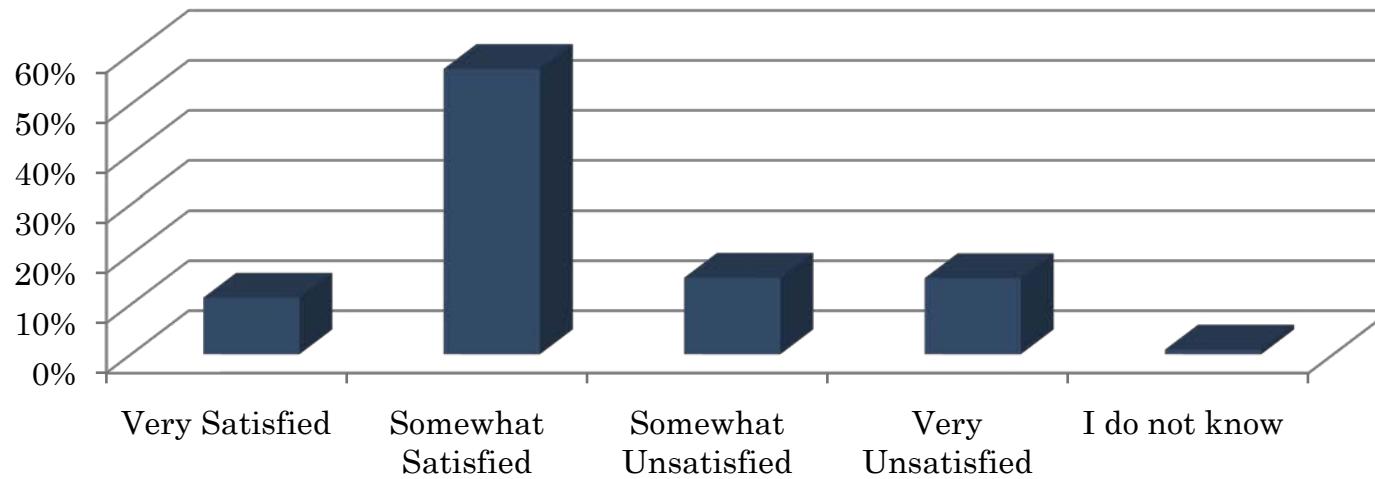
All Respondents.



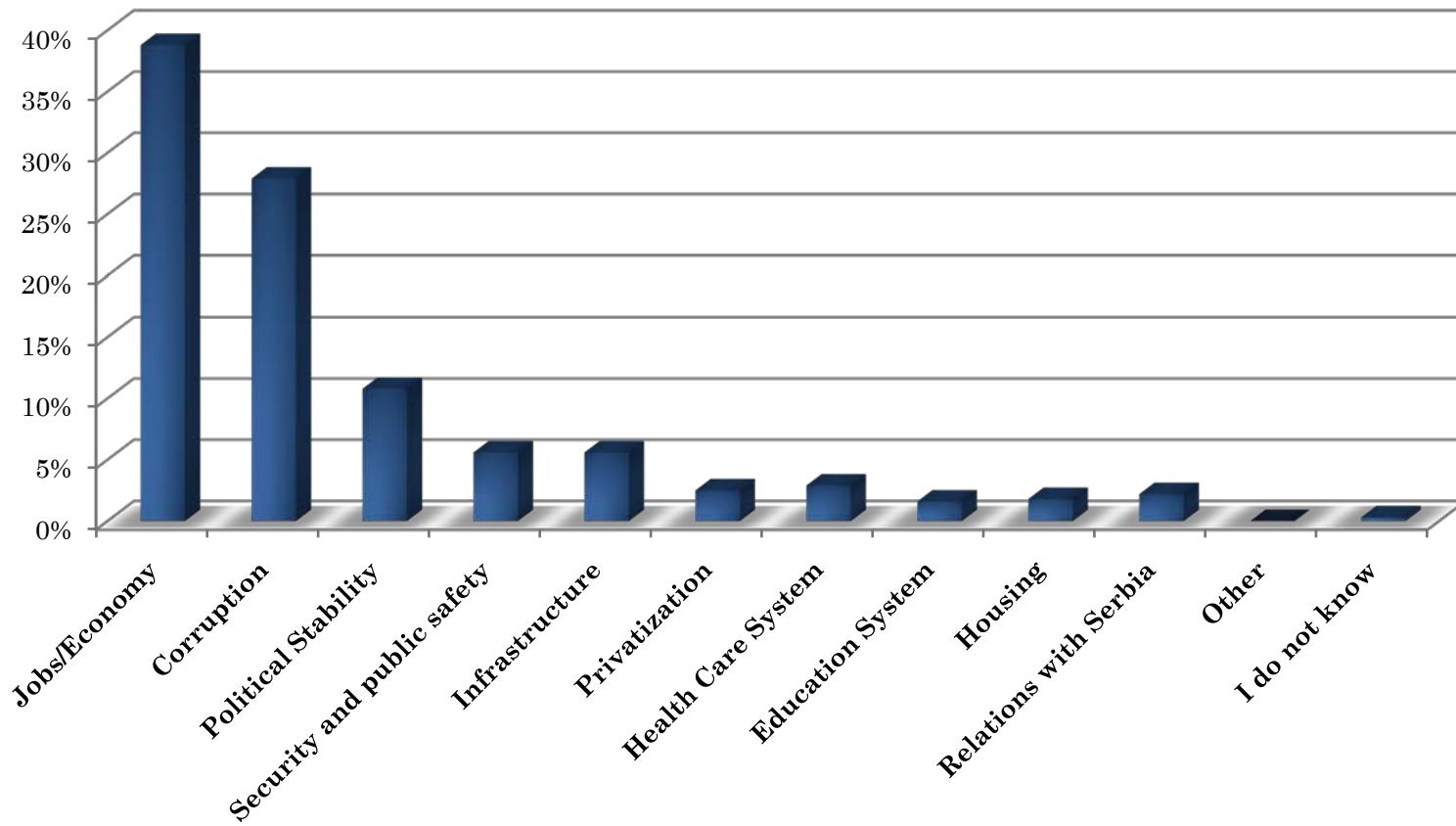
- Geography and ethnicity drive perceptions of Kosovo's overall direction:
  - Majorities of respondents in the regions of Gjakova and Mitrovica believe Kosovo is going in the right direction, while in Prishtina, Peja and Ferizaj the opposite is true.
  - Only 25% of Kosovo Serbs see Kosovo moving in the right direction, while about 44% of Albanians and other minorities hold this view
- There are no appreciable differences along the lines of employment status, age or gender

# SATISFACTION WITH KOSOVO'S PROGRESS SINCE INDEPENDENCE

- A majority of all respondents are at least somewhat satisfied with Kosovo's progress since independence
  - 70% of Kosovo Albanians are very (11%) or somewhat (60%) satisfied, while only 28% of Serb respondents are satisfied with Kosovo's progress.



# TOP PRIORITIES (AGGREGATED)

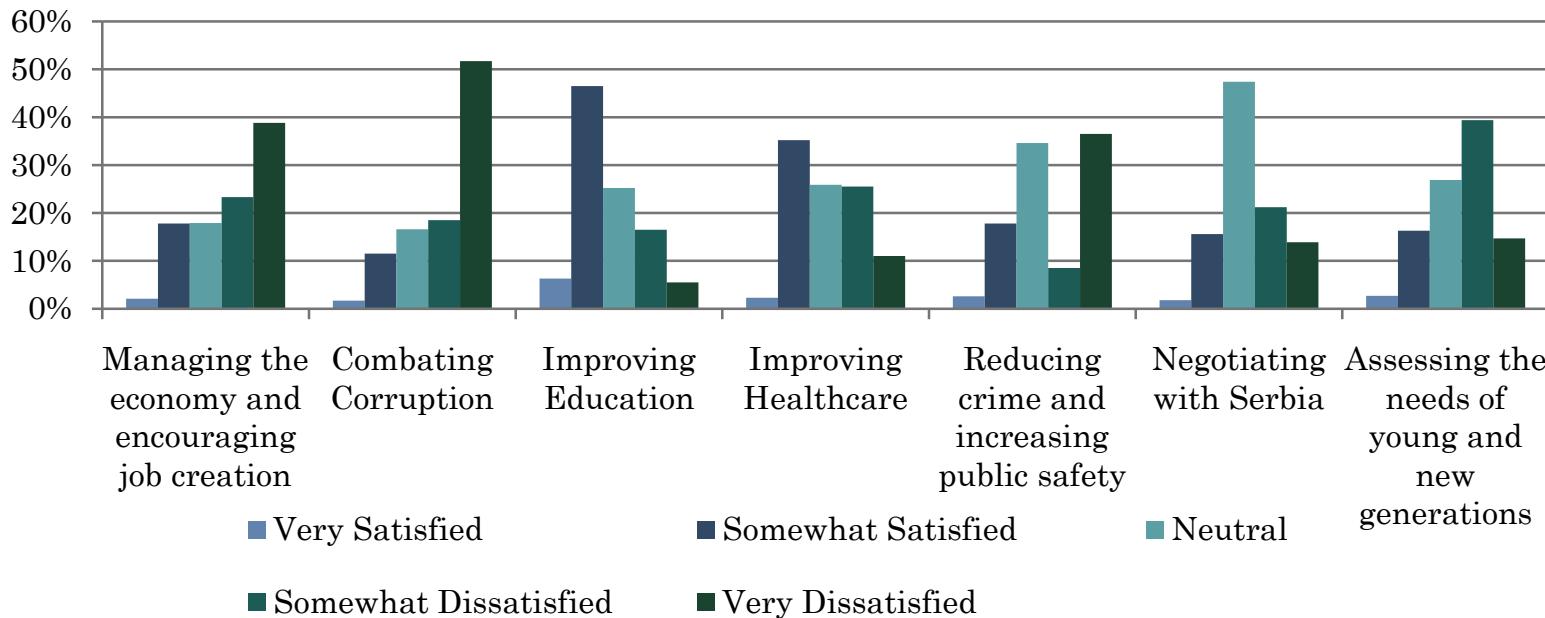


## TOP PRIORITIES

- Jobs and the economy: Across all geographic and demographic categories, the most important problem facing Kosovo is clear
  - 62% of all respondents agree, including 63% of Albanians, 48% of Serbs and 73% of other minorities
  - Almost one quarter of Serbs name security and public safety issues as the biggest problem facing Kosovo
- Corruption is named by majorities of Albanians and other minorities, and a plurality of Serbs, as the second biggest problem facing the state.
  - 25% of Serbs mention jobs, and 13% point to relations with Serbia as the second biggest problem

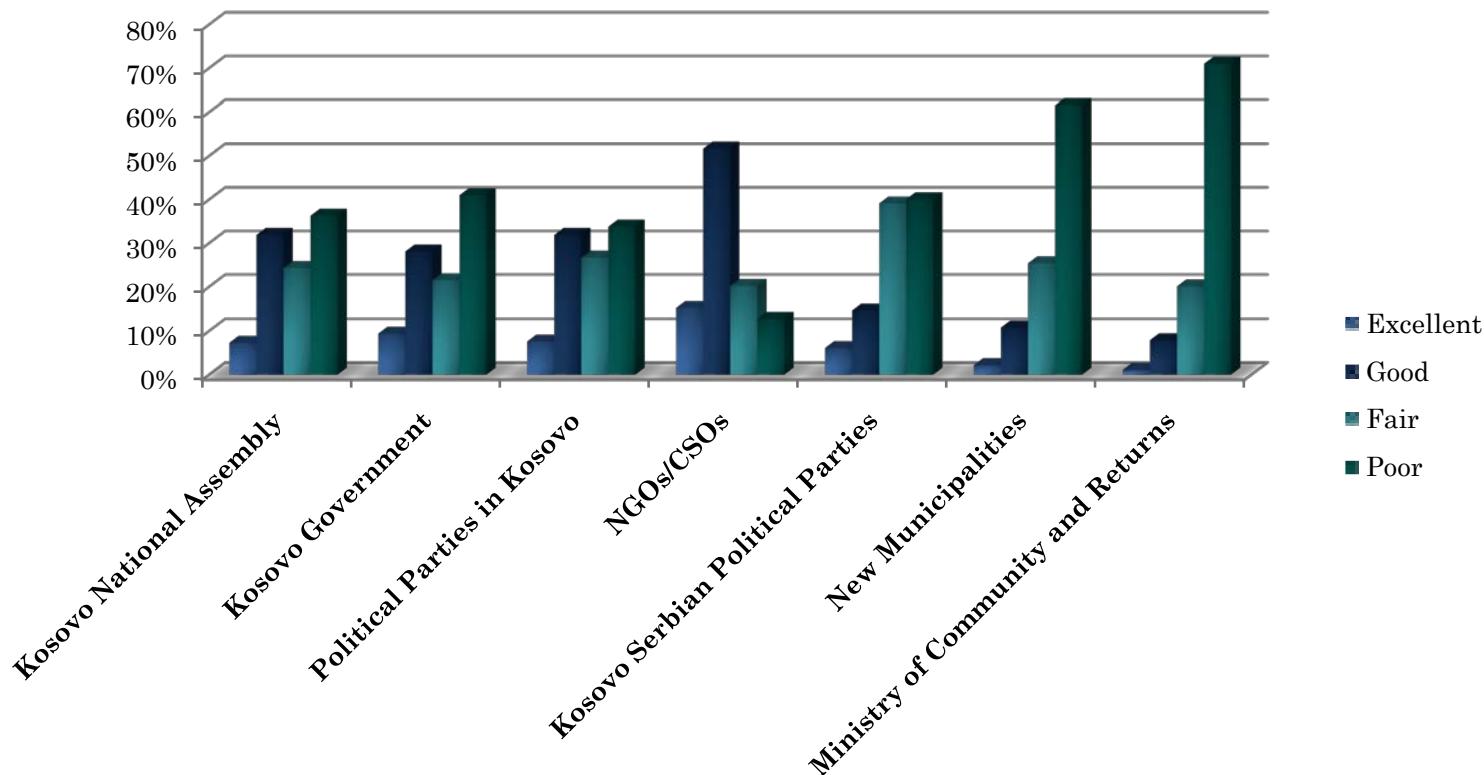
# SATISFACTION WITH ISSUES POST INDEPENDENCE

- Respondents are least satisfied with management of the economy/job creation and combating corruption
- Respondents are most satisfied with improvements in education and healthcare

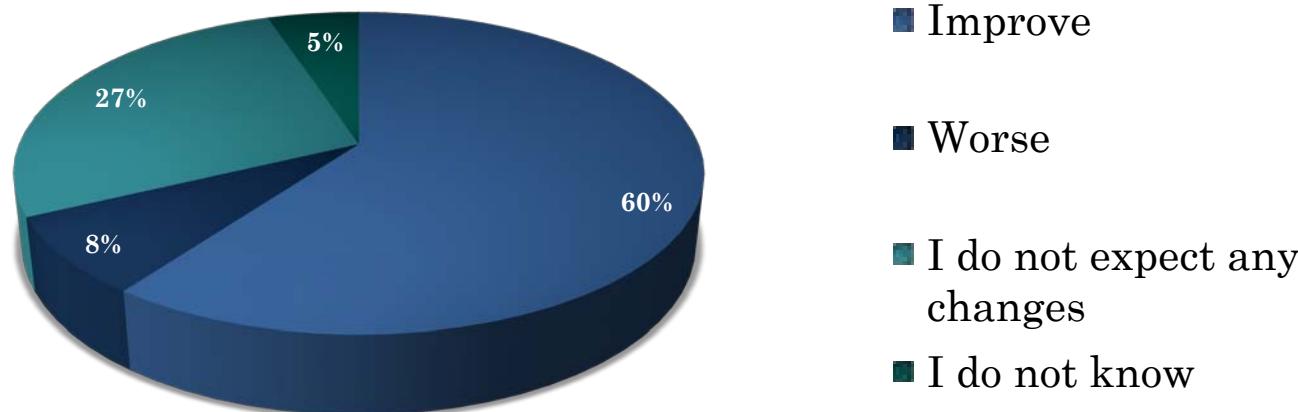


# HOW WOULD YOU RATE THE PERFORMANCE OF THE FOLLOWING INSTITUTIONS IN KOSOVO'S PUBLIC LIFE?

NOTE: KOSOVO ASSEMBLY, GOVERNMENT, PARTIES AND NGOS ASKED OF ALL RESPONDENTS;  
SERB PARTIES, NEW MUNICIPALITIES AND MINISTRY OF C&R ASKED OF SERB RESPONDENTS ONLY



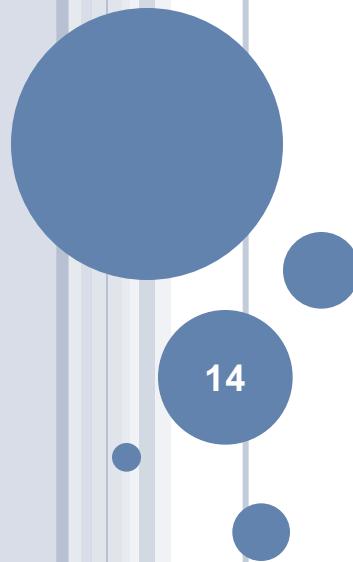
# IN 2011, HOW WILL FAMILY LIFE COMPARE TO TODAY?



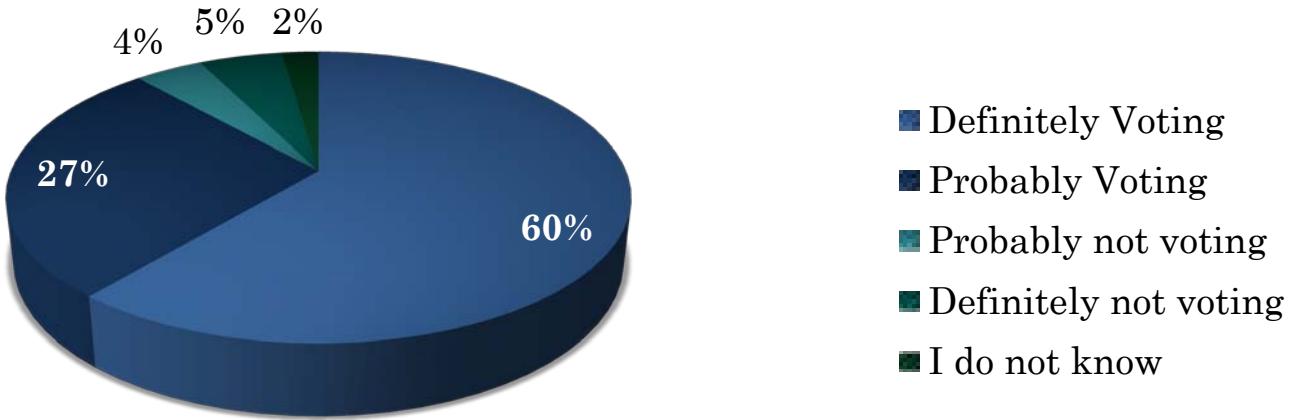
- Kosovo Albanians (62%) and Other Minorities (66%) are much more optimistic than Kosovo Serbs (24%)
- Upward of 70% of respondents from the Mitrovica, Ferizaj and Gjakova regions expect improvements in the year ahead, while feelings were more muted in other areas.
- Women are slightly more sanguine than men (63%-58% expect improvement)



# 2010 PARLIAMENTARY ELECTIONS

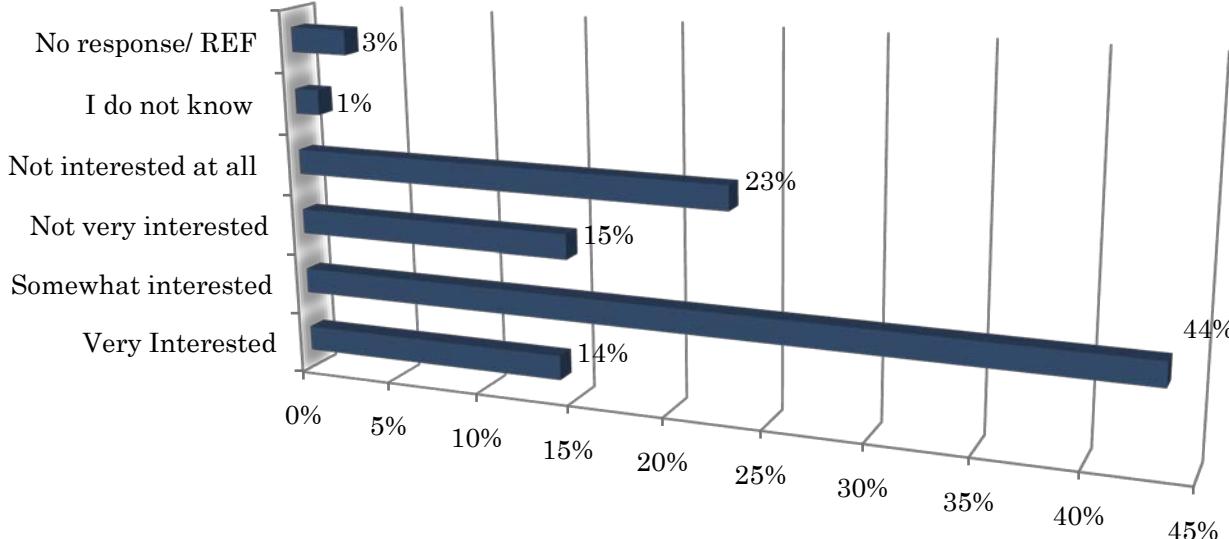


# CENTRAL ASSEMBLY ELECTION: VOTER TURNOUT



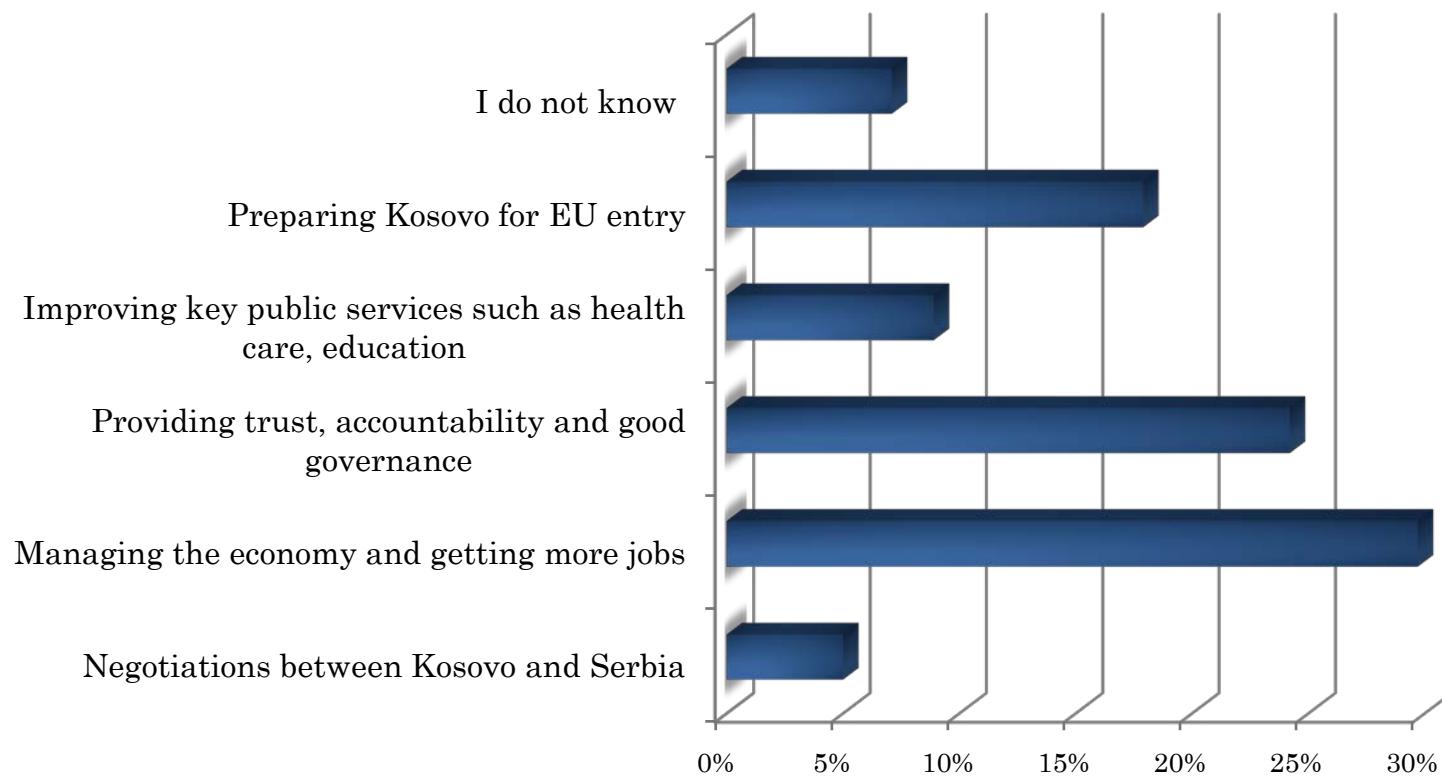
- Across every subgroup with the exception of ethnicity, Kosovars declare their intention to participate in the December, 2010 elections
  - Respondents from the Gjakova and Ferizaj regions are particularly emphatic, with 86% and 79% respectively saying that they will vote.
- 35% of Kosovo Serbs are seriously inclined to vote, while almost 40% declare that they will definitely not vote

# PARTICIPATE IN ELECTION CAMPAIGN

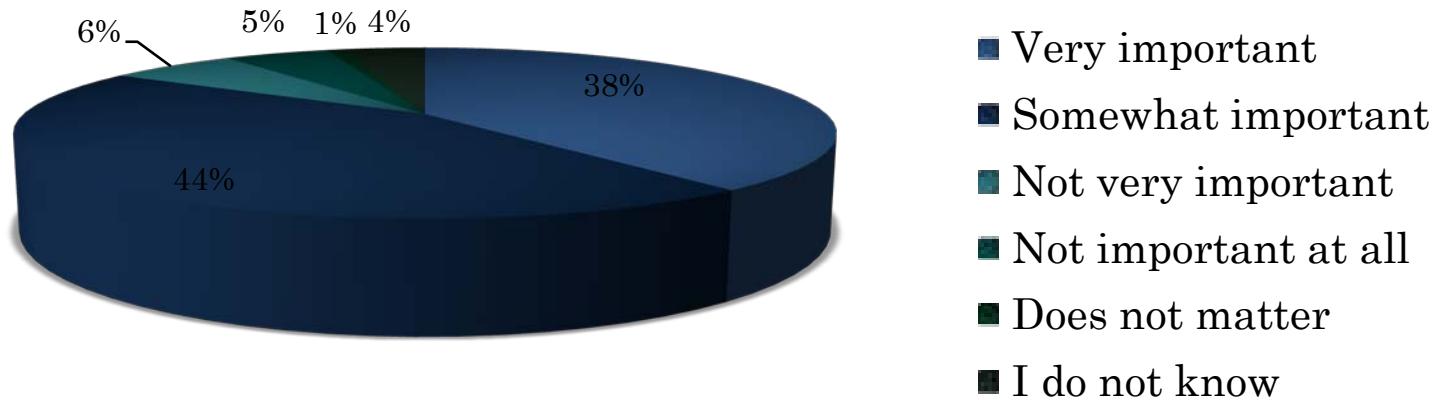


- Almost 6-in-10 Kosovo Albanian respondents express interest in participating in election campaign activities
- Majorities in Mitrovica (81%), Peja (70%) and Prishtina (60%) interested in participating
- Age seems to be a factor in campaign participation, as the average age of interested respondent is 36 while the average age of non-interested respondent is 41
- Interestingly, the unemployed are the least inclined to participate in election activities (51%), while 60% of those with jobs and 59% of retired / students / housewives are interested in participating

# WHICH ISSUE WILL BE THE MOST IMPORTANT FOR YOU, WHEN DETERMINING WHICH PARTY YOU WILL VOTE FOR IN THE COMING ELECTION?

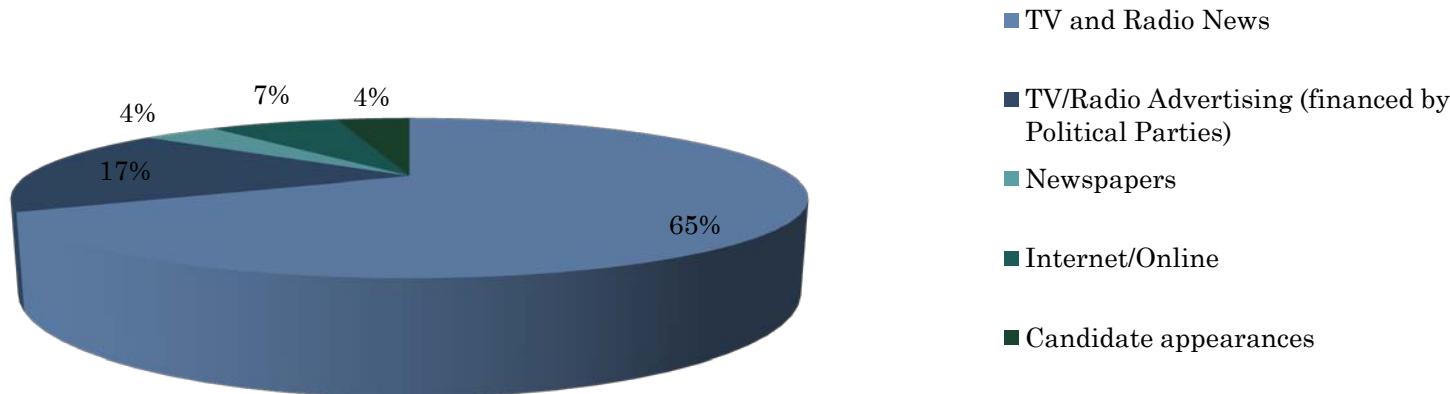


# IMPORTANCE OF MORE WOMEN IN NATIONAL ASSEMBLY



- There is broad agreement on the importance of increasing women's representation in the National Assembly
  - Women exhibit more intensity on the question, with 49% saying it is "very" important, compared to 29% of men
  - While 84% of Albanians agree, only 46% of Kosovo Serbs see increased representation of women as important, and 25% say it is not important at all
  - Respondents in Gjakova, Ferizaj and Gjilan feel particularly strongly about the issue (55%-70% "very important")

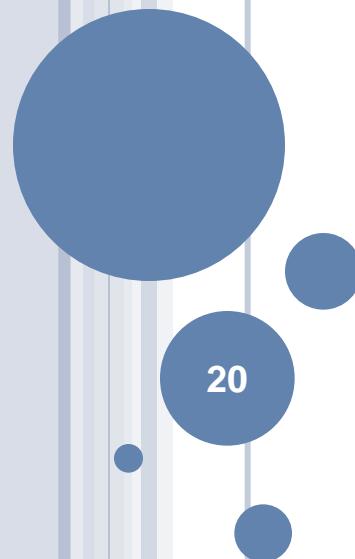
# SOURCES OF CAMPAIGN INFORMATION



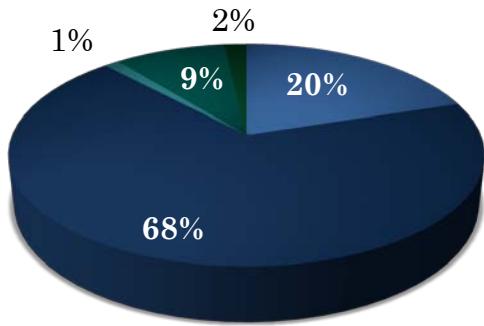
- TV and Radio News is by far the greatest source of campaign information for Kosovars, followed distantly by electronic advertising financed by political parties
  - However, among Kosovo Serbs, a majority (52%) will rely on party advertising, with 10% looking to newspapers, and only 6% pointing to broadcast news as their primary source of campaign information



# POLICY QUESTIONS

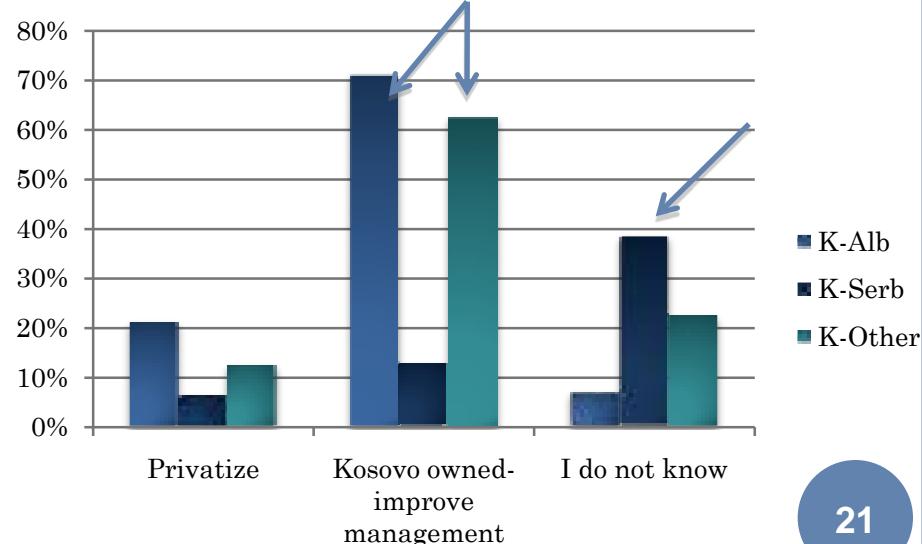


# PTK AND TREPCA MINE: WHAT SHOULD BE DONE?



- While 7 in 10 K-Albanians favor state ownership with improved management, K-Serbs are at a loss as to what should be done, as most don't know or simply refuse to answer
- Men are a bit more likely (24%) than women (16%) to favor privatization

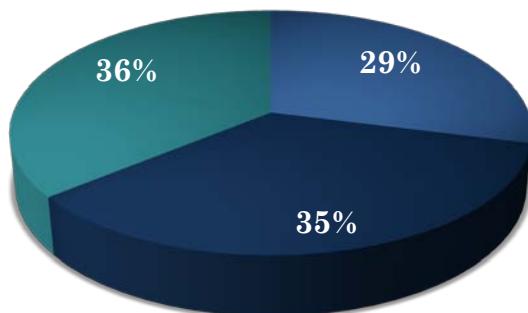
- Privatize
- Remain within ownership of Kosovo but improve management
- Not sure
- I do not know
- No response/ REF



# BEST POLICY FOR THE ECONOMY AND JOB CREATION

NOTE: CLOSED LIST OF RESPONSES; ASKED ONLY OF K-ALBANIANS & OTHER MINORITIES

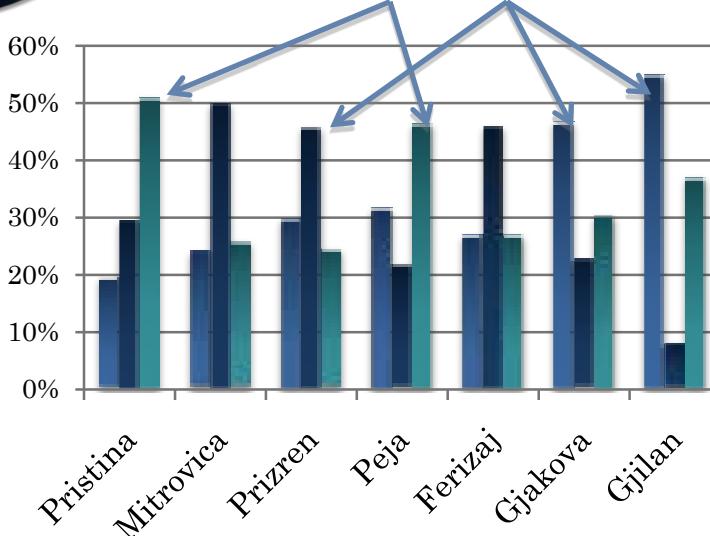
## All Respondents



■ Public Private Partnerships

■ No government interference but stabilizing environment

■ Government led investments



## By Region

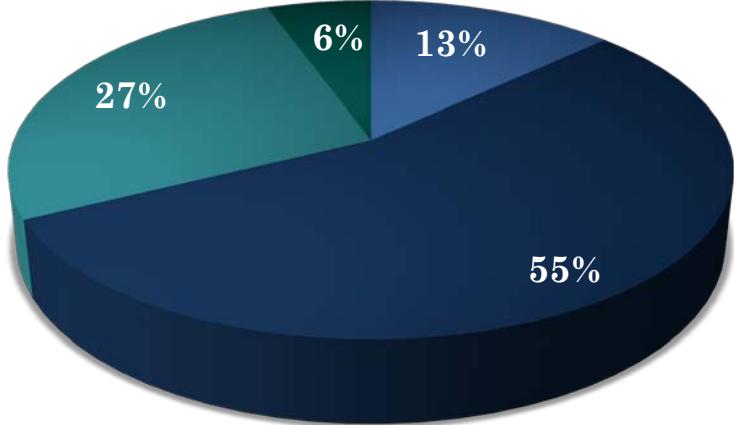
■ Public Private Partnerships

■ No government interference but stabilizing environment

■ Government led investments

# BEST POLICY FOR CORRUPTION AND MISMANAGEMENT

NOTE: CLOSED LIST OF RESPONSES; ASKED ONLY OF K-ALBANIANS & OTHER MINORITIES

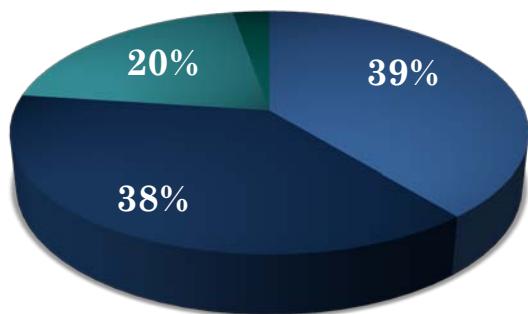


- Making sure that the National Assembly has the resources
- Reform the justice system, hire more judges and prosecutors
- Give more powers and resources to the Kosovo anti-corruption
- Introduce witness protection programs to help get the evidence

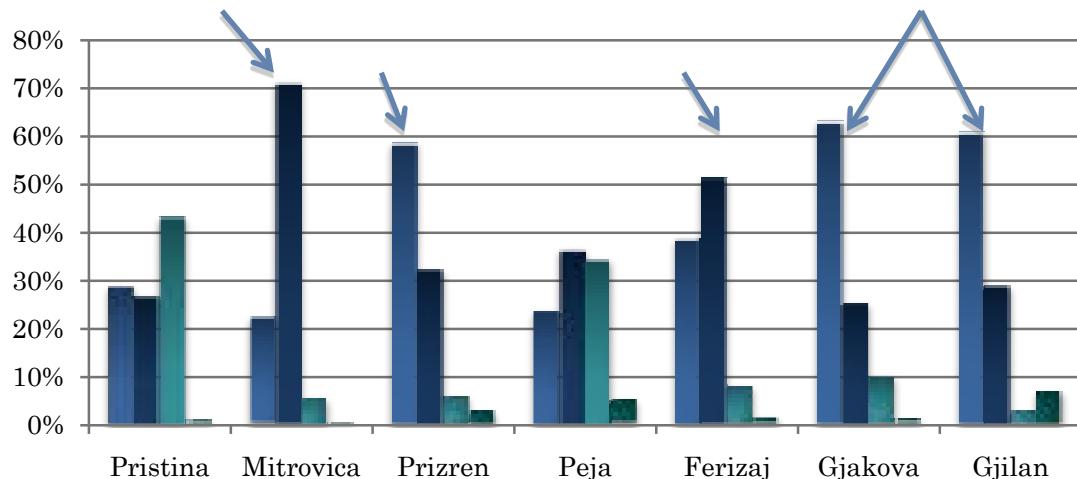
- Cross tabulations (employment status, age, gender, region, ethnicity etc.) show no appreciable variation in responses among different demographic cohorts or between Kosovo Albanians and Other Minorities

# ACTION TOWARDS EU INTEGRATION

NOTE: CLOSED LIST OF RESPONSES; ASKED ONLY OF K-ALBANIANS & OTHER MINORITIES



- Establishing rule of law and significantly reducing corruption
- Cutting unemployment and having decent social benefits
- Creating a stable and attractive investment climate
- Stronger human rights protection



- Establishing rule of law and significantly reducing corruption
- Cutting unemployment and having decent social benefits such
- Creating a stable and attractive investment climate
- Stronger human rights protection