



**National Democratic Institute for International Affairs
Montenegro**

**Key Findings of Public Opinion Poll
November 2008**

INTRODUCTION

This report presents and analyzes key findings from the second in a series of NDI political research in Montenegro in 2008 and 2009. The current series follows on from a series of 12 polls conducted by NDI between March 2001 and March 2004 and two conducted in 2007. The 2008 series uses a changed questionnaire that reflects current issues in society and will continue with two additional polls throughout the next year. Where possible, comparisons with previous NDI research are presented.

This research is the property of the National Democratic Institute for International Affairs (NDI) and produced with the financial support of the United States Agency for International Development (USAID) under the conditions regulated by Cooperative Agreement No. 170-A-00-06-00103-00. Opinions expressed herein are the author's and do not necessarily reflect the views of USAID. The research project is part of NDI's USAID-funded parliamentary assistance program and is intended to assist NDI's partners – the political parties represented in the Assembly of Montenegro – to improve their ability to represent the interests of and communicate with the people of Montenegro as the country pursues its Euro-Atlantic integration goals.

Between 31 October and 14 November, 1,250 residents in Montenegro participated in face-to-face interviews designed to measure their attitudes about current government institutions, the political situation, reform initiatives, Montenegro's Euro-Atlantic future, and other issues of importance to voters. The interviews were conducted in 16 of Montenegro's 21 municipalities. Excluded from the sample were the municipalities of Andrijevica, Kotor, Mojkovac, Šavnik, and Žabljak. Prism Research, a polling firm established in Australia with offices throughout the former Yugoslavia, conducted the fieldwork.

The margin of error on a sample of 1,200 is +/- 3 percent.

In the United States, Canada and Western Europe, political parties conduct public opinion surveys in order to test the public attitudes regarding topical issues of the day. Results are then used to develop plans to communicate with the public. If the planning is done effectively and implemented properly, a political party can successfully compete in elections. In this context, public opinion surveys are not used as a means of predicting the outcome of upcoming elections. **This report should equally be viewed as an assessment of public attitudes in Montenegro at the moment and not as a predictor of the outcome of any future elections.**

EXECUTIVE SUMMARY

While Still Higher than 50 Percent, Satisfaction with Government Declines

The summer has ended; and, depending on where one lives in Montenegro, winter has arrived or is coming. The current public opinion research findings wipe out any ‘summer-time’ bounce – i.e., optimism caused by the approach of summer – that may have been seen in the last poll, such that satisfaction with the Government and its reforms, as well as trust in state institutions, declined some 5-6 percent since May 2008. Also, fewer respondents are willing to say their economic situation has improved in the last two years. The most significant declines are a 12 percent decrease in satisfaction with health services and 7 percent decline in satisfaction with current municipal government – especially notable at the Coast and the northern municipalities of Nikšić, Pljevlja, and Plužine.

Respondents identify the level of salaries as the most important issue for them when choosing a political party for which to vote. When this issue is combined with the importance respondents assign to the protection of protecting workers’ rights and price increases, the ‘bread-and-butter’ issues of ordinary families are the most important issues for close to a majority of respondents. Thus, it is not surprising to see that one third of respondents continue to believe that Government’s highest economic priority should be creating new jobs and that almost two-thirds (61 percent) believe that the road to economic success is through the stimulation of small businesses as opposed to investment in big industry. Still, 31 percent of respondents think that high taxes makes it difficult to start a new business, while another 23 percent identify the lack of start-up capital as the problem.

Like the economic situation, trust in political parties has declined a bit. In addition, less than a quarter of respondents (or 11 percent less than in May) think that the political situation has improved in the last two years; and, more than two-thirds of respondents – including a large number of economically vulnerable groups – want the opposition to express a little bit or much more readiness to cooperate on the resolution of key issues. With these attitudes, 35 percent of respondents say they will vote for the Democratic Party of Socialists (DPS), while another 26 percent of respondents identify one of the larger opposition parties or groups, including the Socialist People’s Party (SNP), Serbian List (SL), or Movement for Changes (PzP). Still, another 30 percent either do not provide an answer, do not intend to vote, or are undecided.

Euro-Atlantic Integration

A majority of respondents (56 percent) considers relations with the European Union to be most important for Montenegro, and 43 and 23 percent of respondents identify European salaries or freedom to travel, respectively, as their understanding of a European quality of life. Still, 58 percent

believe that joining the European Union will not have that much affect on the lives of people in the near future, even if it is important for the country's international relations. In a straight 'yes-no' question, 54 percent oppose Montenegro becoming a member of the NATO Alliance with the largest number (43 percent) believing that membership will require Montenegrins to go fight in the wars of other countries. Still, the 46 percent that think Montenegro should join NATO see the biggest advantage as either another important step toward EU membership (34 percent) or greater regional stability (35 percent). Despite a two-percent increase in the number of 'no' responses since May, the change is insignificant since the margin of error on this poll is +/- 3 percent.

Defining Demographic Divisions

The most defining demographic differences exist among ethnic groups, especially between self-identified Serbs and Bosniaks – and, to a lesser extent, Muslims. Bosniaks are overwhelmingly, and Muslims generally, supportive of government institutions and its initiatives, while self-identified Serbs are generally or overwhelmingly negative. In November, NDI found that self-identified Albanians, Croats and others do not tend toward support for government positions as they have in the past – but, instead, toward opposition. The starkest change among these smaller minorities is a significantly greater distrust in their municipal governments. The finding could be the result of events at the very moment the poll was in the field or could signal a long-term trend. Subsequent research will help establish the facts.

The ethnic differences manifest themselves also in geographic differences where the ethnic groups are concentrated. Thus, the eastern municipalities of Montenegro (including Berane, Bijelo Polje, Plav, and Rožaje) express a much higher degree of support for government and its initiatives, while the northern municipalities (including the industrial towns of Nikšić, Pljevlja, and Plužine) are more pessimistic about government, its initiatives, and the future in general. They are also more likely to have no opinion – or to think that expressing it will not make any difference (i.e., to refuse to answer).

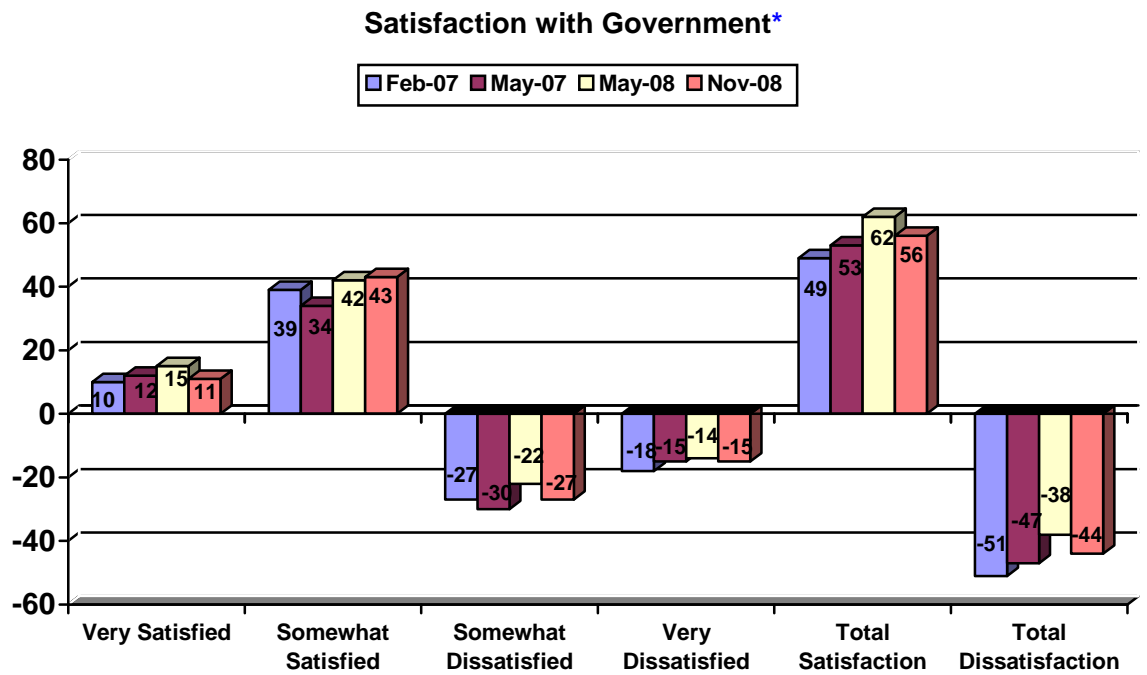
Finally, the data shows that pensioners are getting nervous about price increases, especially in the energy sector, which contrasts with the younger generations that are more optimistic about the future and the ability to overcome any challenge. Other demographic differences are seen between men and women, wherein women worry more about salary levels and price increases and tend to be milder in their political attitudes.

GOVERNMENT AND ECONOMIC SITUATION

While satisfaction with the current government remains above 50 percent, it has dropped 6 percent since May. At the same time, there is a 6 percent decline in the number of those who say that their economic situation is better than it was two years ago. Only 30 percent now say it is better, 37 percent say it is the same, and 32 percent that it is worse.

Dissatisfaction with the government and respondents' personal economic situation is higher in the North (which includes the municipalities of Nikšić and Pljevlja) and increases with age. In addition, there is a large gulf between self-identified Serbs and self-identified Bosniaks with the latter being 92 percent satisfied

with the current government and the former being 69 percent dissatisfied. Almost two-thirds of self-identified Montenegrins (64 percent) are also satisfied with the current government and more likely to consider their economic situation as improved.



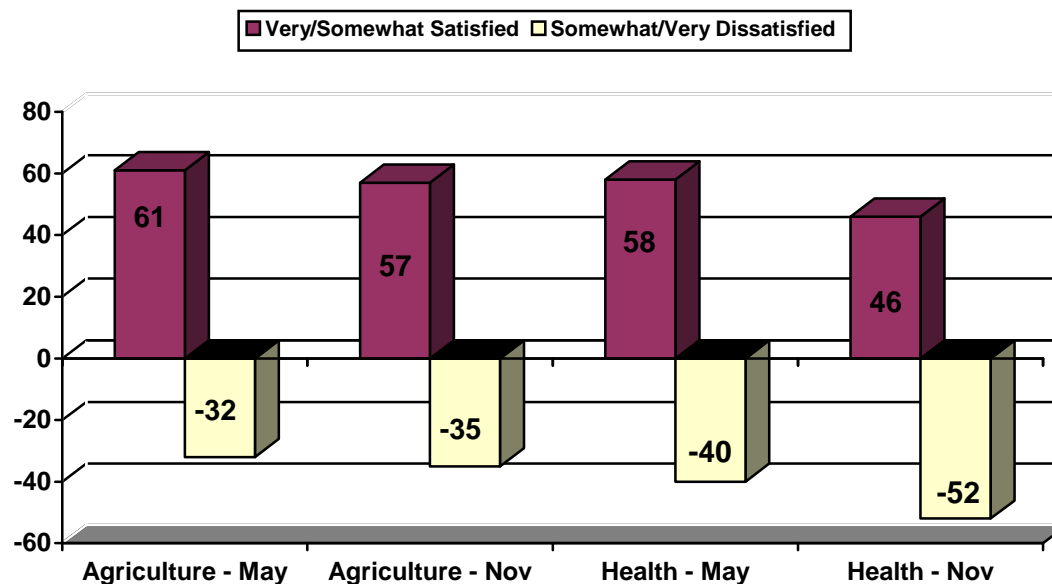
* The last two sets of columns do not include respondents who were unable to answer this question, presenting absolute percentages only for those who expressed an opinion.

Agricultural and Health Policies

Given the declining satisfaction with Government, it is understandable that there is a declining satisfaction with Government's agricultural and health policies since May (as presented in the table to the right).

While satisfaction with government support to the agricultural sector declined 4 percent, the more dramatic decline is in respondent attitudes toward the situation in the health services, which has declined 12 percent in the last six months and returned to levels seen in May 2007. Dissatisfaction increases with age and reaches a full 59 percent in coastal municipalities and 64 percent among those identifying themselves as ethnic Albanians, Croats, or something else. Self-identified Muslims at 70 percent and Bosniaks at 79 percent are most satisfied with health services.

Satisfaction with Government's Agricultural and Health Policies
(in percentage)

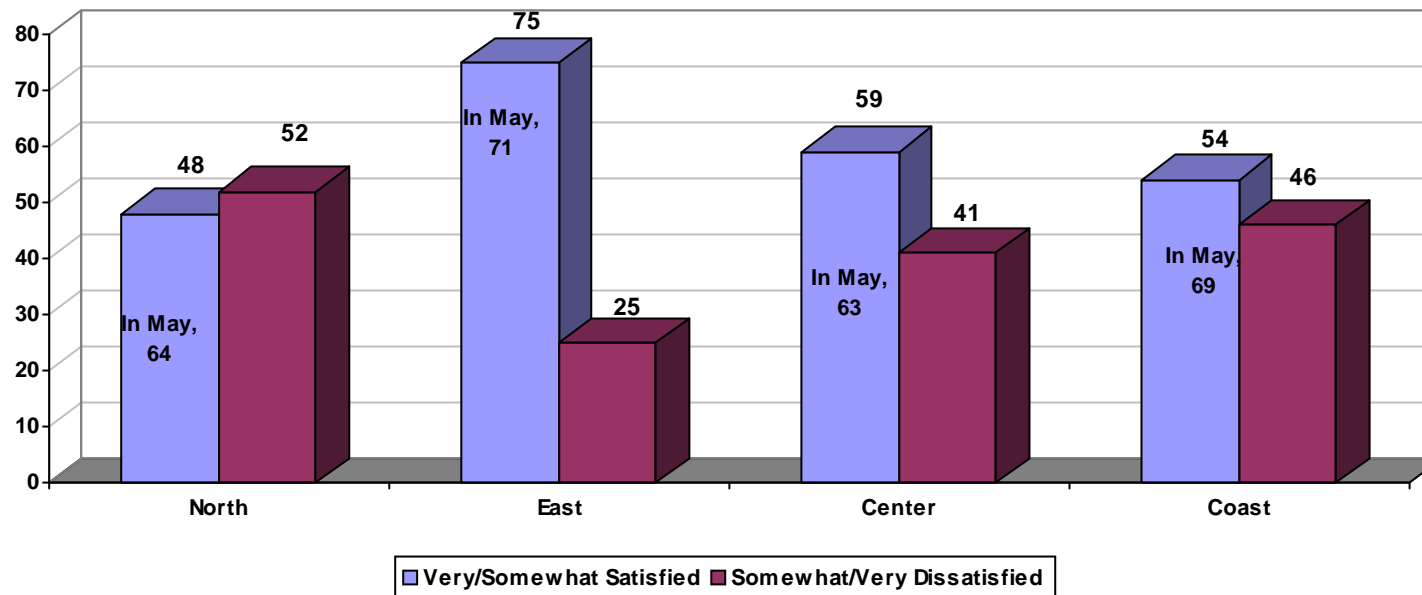


Attitudes toward Government support for development of the agricultural sector differ across ethnic groups and across the poorer municipalities. As such, while only 31 percent of those living in northern municipalities of Nikšić, Plužine, and Pljevlja are somewhat satisfied with that support, those living in eastern municipalities that include Berane, Bijelo Polje, Plav and others express 60 percent satisfaction. Equally, self-identified Montenegrins, Muslims, and Bosniaks are 67, 73 and 88 percent, respectively, satisfied with agricultural support, while self-identified Serbs are 56 percent dissatisfied and self-identified ethnic Albanians, Croats, and others 46 percent dissatisfied.

Satisfaction with Municipal Government

Nationwide, satisfaction with municipal government stands at 60 percent, which is a 7 percent decline since May and reflects a 16 and 15 percent, respectively, drop in satisfaction in northern and coastal municipalities. Differences among ethnic groups are similar to those seen in satisfaction with the national government. While 85 percent of self-identified Bosniaks continue to be quite satisfied, self-identified Serbs are even less satisfied than they were in May (47 percent now compared with 53 percent) and self-identified Albanians, Croats, and others are much less satisfied (only 40 percent).

Assessment of Current Municipal Government



- **North:** Nikšić, Pljevlja, and Plužine
- **East:** Berane, Bijelo Polje, Kolašin, Plav, and Rožaje
- **Center:** Cetinje, Danilovgrad, and Podgorica
- **Coast:** Bar, Budva, Herceg Novi, Tivat, and Ulcinj

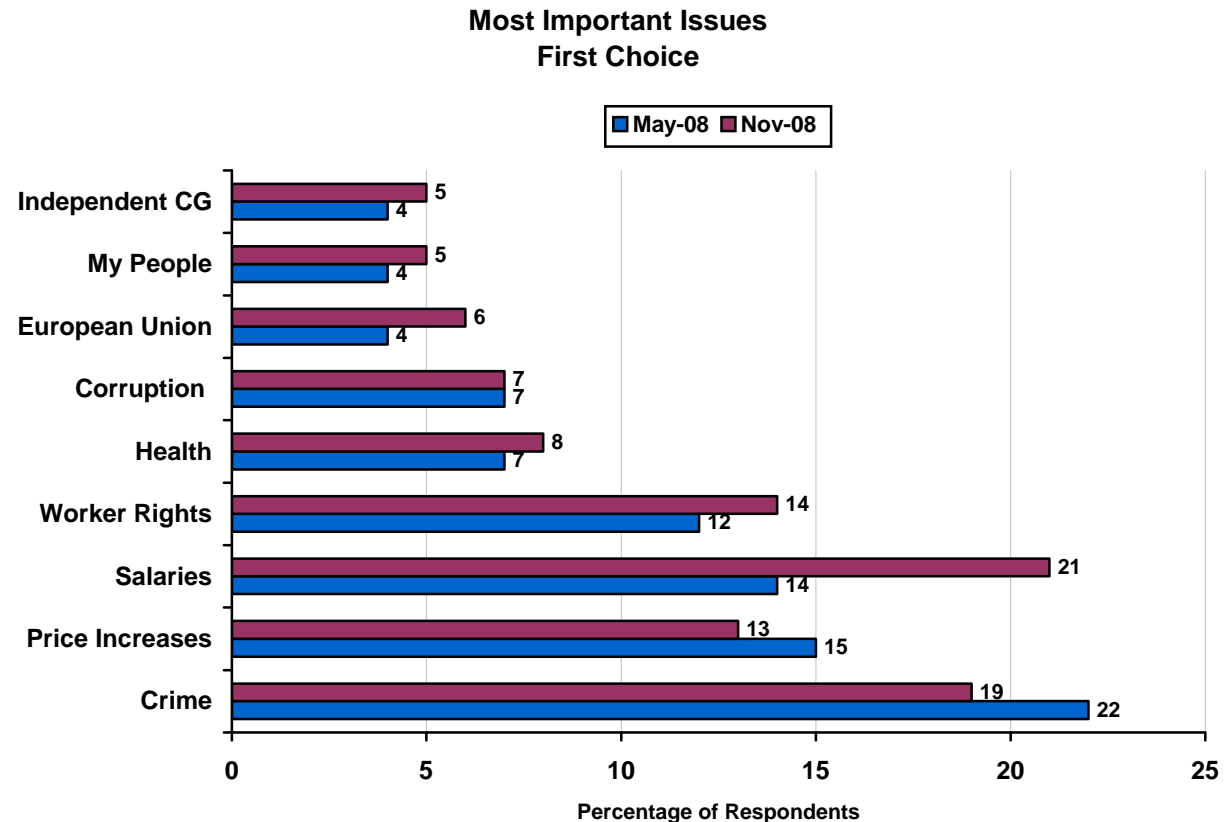
MOST IMPORTANT ISSUES

From the following list, respondents were asked to name the issues they consider most important when deciding for which party to vote, and the table to the right displays respondents' answers from May and November 2008:

- Salaries;
- Crime;
- Rights of workers;
- Price increases;
- Health;
- Corruption;
- European Union;
- My people in Montenegro; and,
- Independent Montenegro.

The importance of salary levels has increased since May; and, in fact, the importance of living standards – combining price increases, salaries, and worker rights – has increased as a whole from 41 to 48 percent.

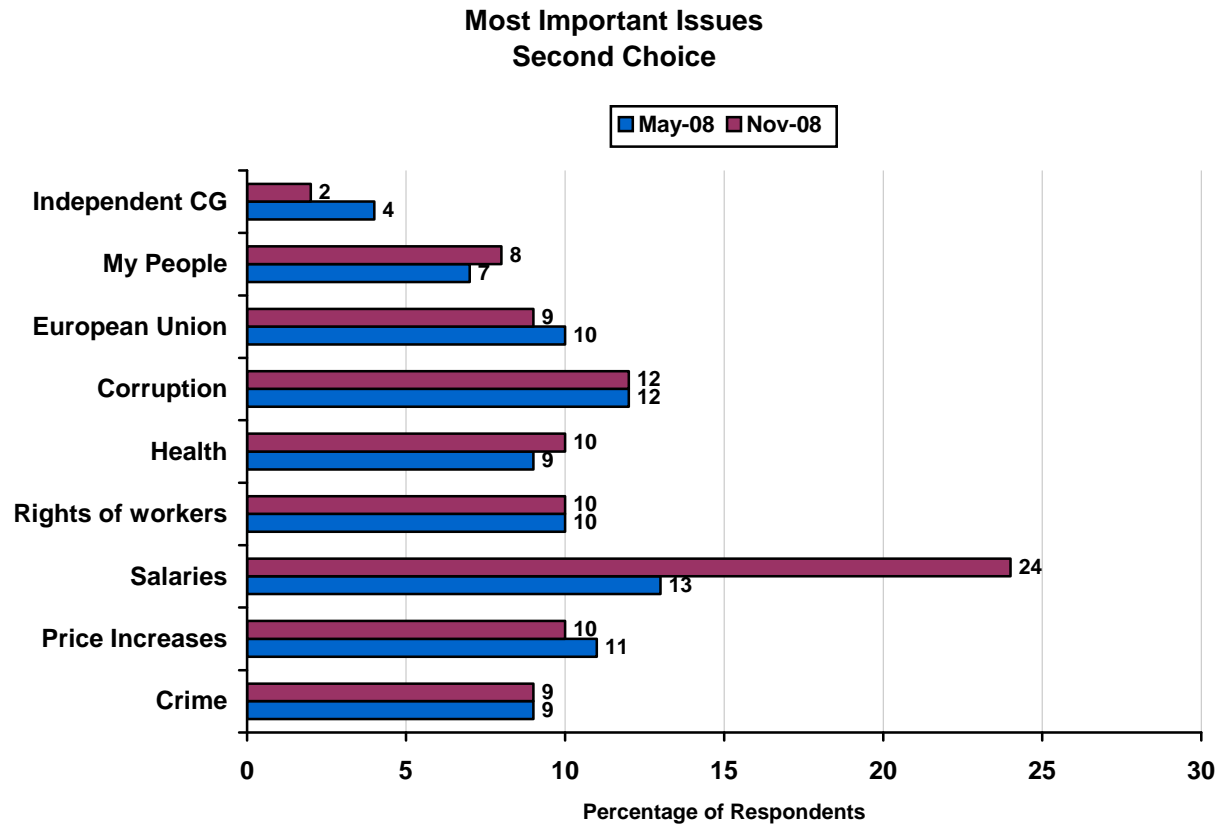
Those living in northern municipalities, especially Nikšić and Pljevlja, are more likely to choose price increases, while the importance of membership in the European Union is highest in eastern municipalities and among self-identified Bosniaks. Students and others with higher levels of education are relatively more likely to consider the issue of corruption as important.



Second Most Important Issue

Using the same list as displayed on the previous page, respondents were asked to choose a second most important issue when considering for whom to vote. The table at the right presents responses from opinion polls in May and November.

Again, respondents have assigned a much higher level of importance to the issue of salaries as a second choice. Almost half of respondents (45 percent) choose this option as a first or second choice. Similarly, 44 percent of respondents choose a ‘bread-and-butter’ issue as their second most important issue. In addition, self-identified Bosniaks are somewhat more likely than all respondents to choose healthcare as important. Finally, as education levels increase, respondents are more likely to choose either crime or corruption as important issues.



CHOOSING GOVERNMENT PRIORITIES

From a closed list, respondents were asked to identify what they thought should be Government's most important economic priority.

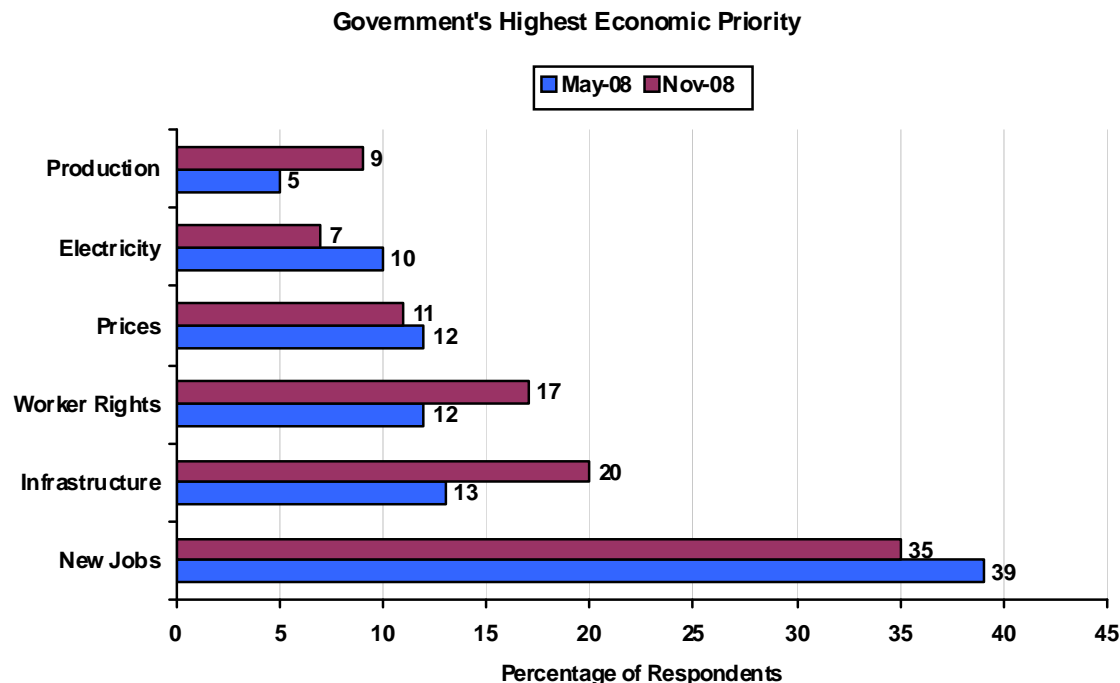
Government's Highest Economic Priority

The choices included:

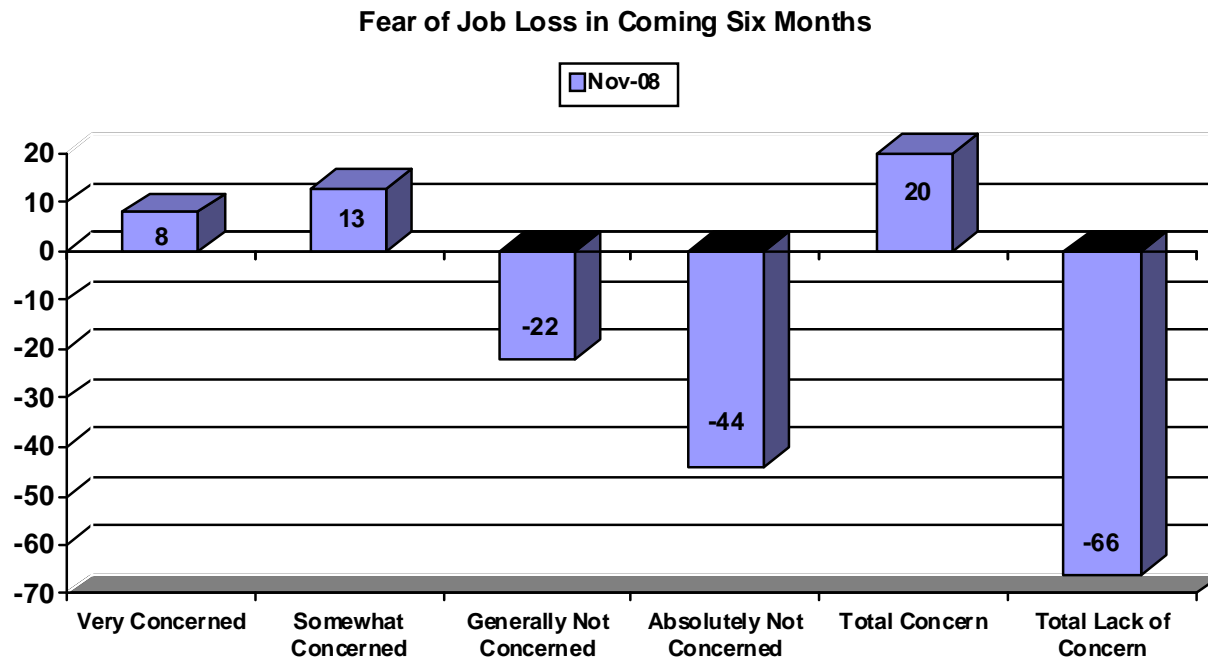
- Creating new jobs;
- Investing in infrastructure;
- Protection of workers' rights;
- Controlling price increases;
- Solving energy deficit; and,
- Stimulating production.

While more than one-third of respondents continue to believe that Government should focus on opening new work places (including a relatively higher percentage of those earning 201-300€ per month, those between the ages of 31 and 40, and those living in eastern municipalities), the importance of both investing in infrastructure and protecting workers' rights has increased noticeably. A higher percentage of self-identified Bosniaks (39 percent) and those in the highest income brackets (27 percent) choose infrastructure as a priority, while almost a quarter (24 percent) of those living in the industrial northern municipalities of Nikšić and Pljevlja want Government to concentrate on protecting workers' rights.

The fact that controlling price increases is not identified as a top priority is likely evidence that some respondents have determined, that, given the global economic slowdown, there is little that any government can do to control prices. Nonetheless, this issue is of concern for pensioners who have a higher propensity to think Government needs to focus its energy on this issue.



During focus group research conducted by NDI in October, participants frequently complained about the lost glory days of Yugoslavia, which secured jobs and substantial benefits for its citizens through large industrial complexes that now have a much reduced economic power. Focus group participants also regularly turned discussion about small- and medium-sized enterprises (SMEs) into a discussion about the insecurity of jobs in the private sector and the proliferation of nonproductive small businesses (e.g., cafés, boutiques, hair salons). To learn more about citizens’ views regarding these issues, NDI asked poll respondents what they believed to be the optimum development approach for improved living standards in Montenegro and the level of concern about losing their jobs in the next six months.



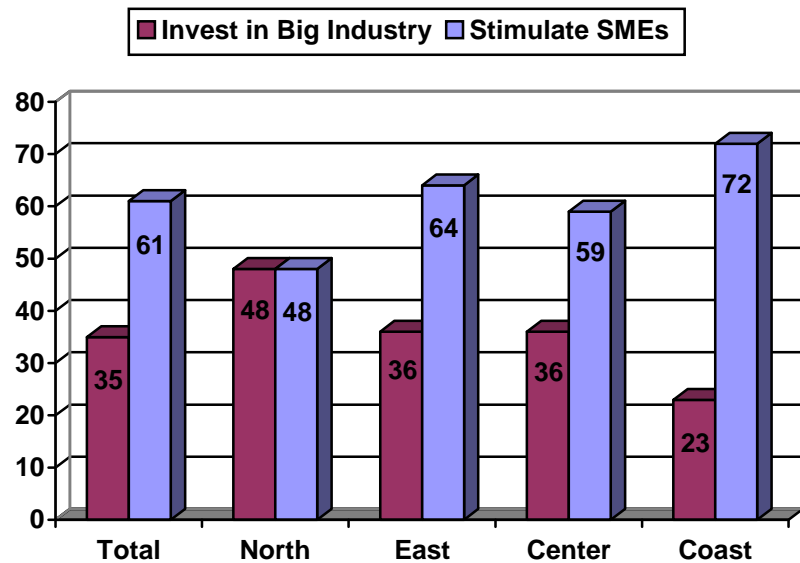
Higher levels of concern about job loss are expressed at the Coast, as well as among demographic groups that ordinarily have confidence in issues related to Montenegro’s economic development – namely, the employed and self-identified Bosniaks.

As can be seen from the chart on the next page, the biggest difference of opinion about development approaches exists between the industrial northern and coastal municipalities. In addition to these differences, a larger percentage of self-identified Muslims and Bosniaks at 71 and 79 percent, respectively, are

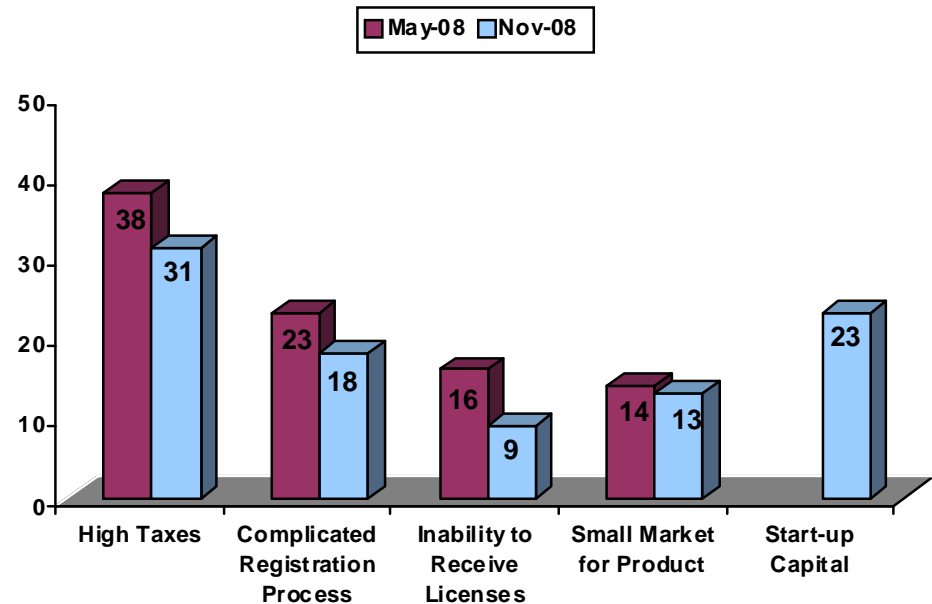
committed to the stimulation of small- and medium-sized enterprises (SMEs), while 43 percent of self-identified Serbs think investment in the big industrial companies could improve living standards. The older generation and those who currently have no income are also nostalgic for the former industrial powerhouses, while respondents with a university education favor the SME approach.

While those living in coastal and eastern municipalities may favor SMEs as a development approach, they are also more likely to be among the almost one-third of respondents who identify high taxes as the biggest obstacle to opening a business. Self-identified Bosniaks and Serbs are both proportionally more concerned about this issue, while those residing in the northern municipalities are more likely to identify the problem as a lack of start-up capital, an option that was not included in NDI's previous poll. Bosniaks are also more likely to identify complicated procedures.

Best Development Approach



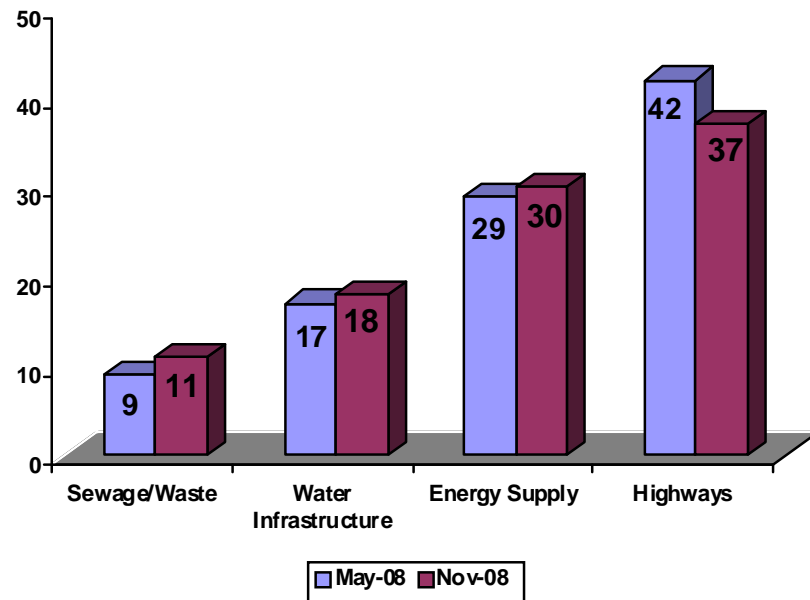
Obstacle to Starting Business



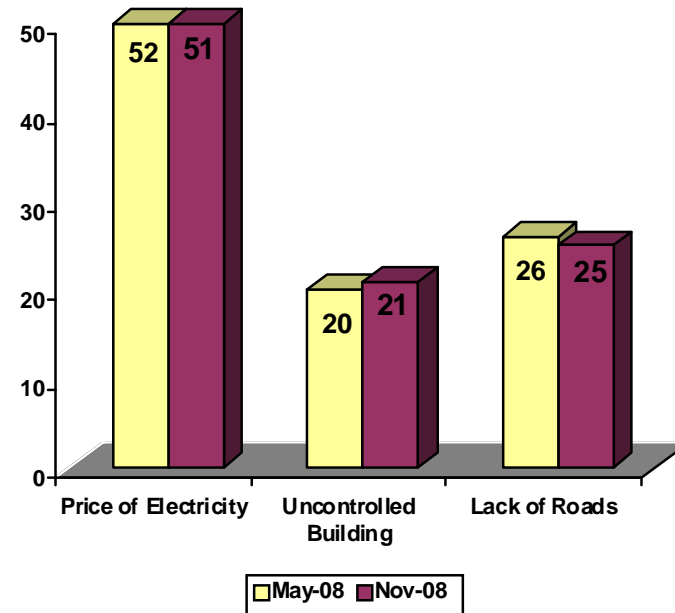
There is little change in respondents' opinions about the priorities for infrastructure investments. Again, the coastal municipalities have a greater interest than the average respondent in investments in water supply, and women express greater interest than men in investments in energy supply. The eastern municipalities, as well as students and those with higher incomes, demonstrate a greater interest in highway investments. As was the case in May, self-identified Bosniaks identify sewage and waste management more often and, this time, also have a greater interest in water supply.

There is also little change in opinion about potential threats to Montenegro's economic development in the near future – a majority continues to say it is the price of electricity. Concern about the price of electricity is pronounced particularly among the most vulnerable demographic groups – those with no incomes or small incomes, pensioners, and homemakers. It also concerns a greater proportion of self-identified Albanians and Croats, and those living on the coast.

Infrastructure Priority



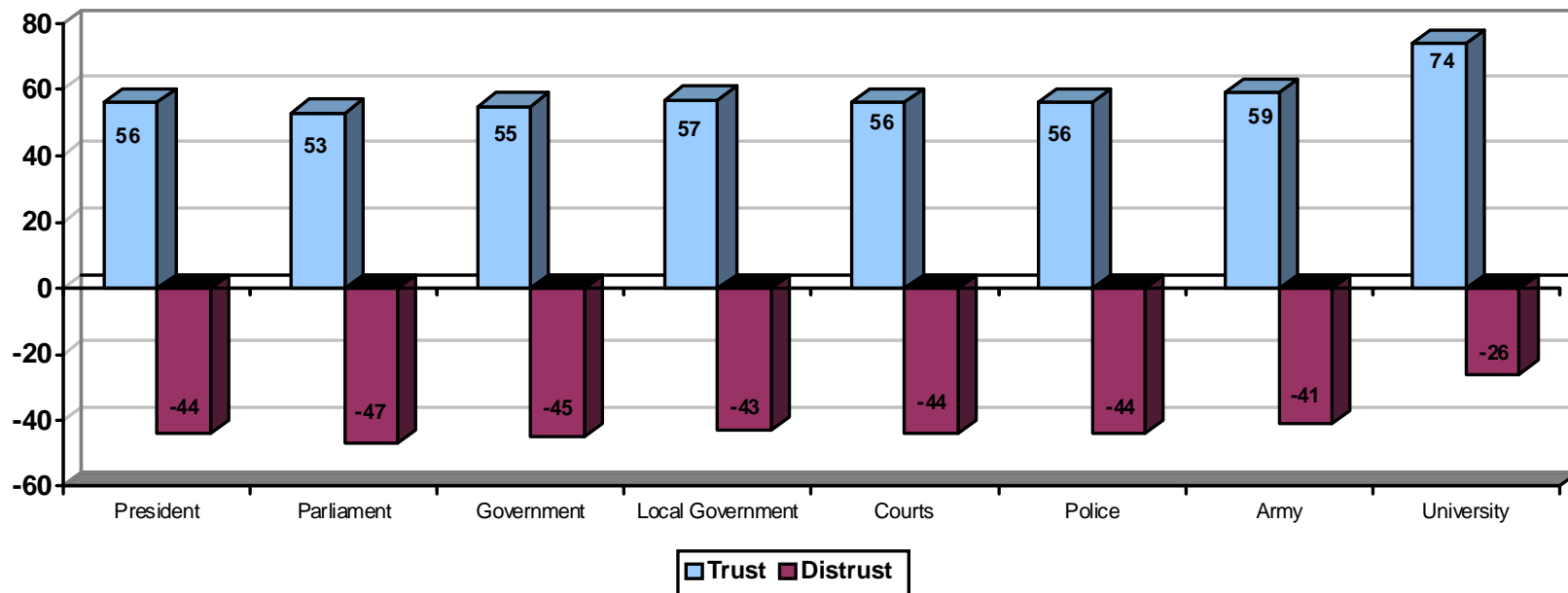
Greatest Threat to Montenegrin Development



TRUST IN STATE INSTITUTIONS

Respondents' faith in state institutions is decreased somewhat since May, and, with the presidential election farther away, trust in the office of the president declined the most (8 percent). The most significant change among demographic groups is the growing lack of trust among those who identify themselves as Albanian, Croat, or other small minority group of which 62 percent distrust local governments, 54 percent courts and police, and 51 percent the Army. Self-identified Serbs are 17 percent more likely to distrust all institutions, except the university, while self-identified Muslims and Bosniaks are 16 and 31 percent, respectively, more likely to trust all institutions.

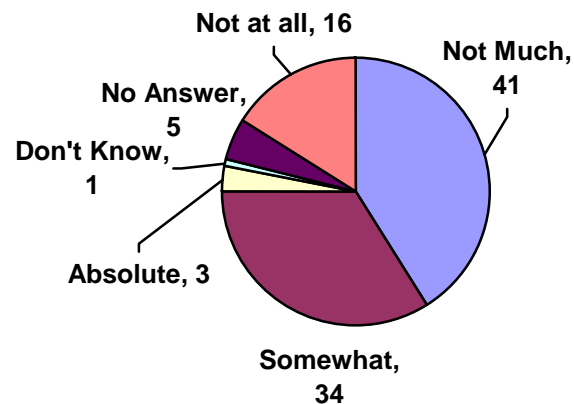
Trust in Institutions



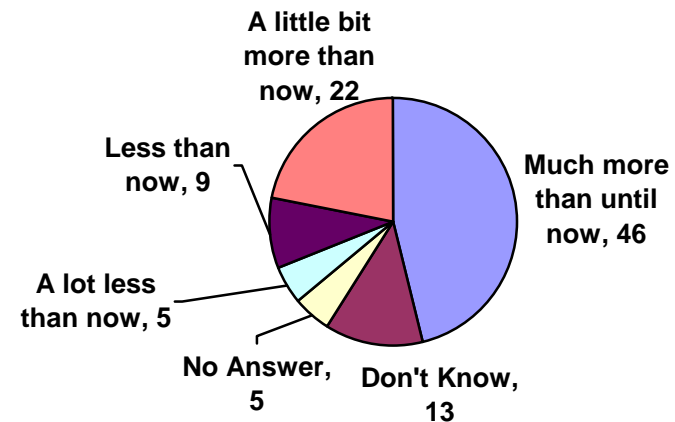
ATTITUDE ABOUT POLITICS, POLITICAL PARTIES, POLITICAL LEADERS, AND PARLIAMENT

Since May, there is little change in trust in political parties or attitude toward the behavior of the opposition. But, 11 percent fewer respondents say that the political situation is better than it was two years ago, while those who think that it is the same increased 9 percent. A significant majority of respondents (57 percent) do not trust political parties, which includes 67 percent of those living in central municipalities and 70 percent of those who identify themselves as Serbs. The economically vulnerable – that is, 57 percent of the unemployed and of those earning up to 200€ – want the opposition to express a much greater readiness to cooperate than it does now, as do two-thirds of self-identified Bosniaks and six in every 10 respondents living in coastal or eastern municipalities or identifying themselves as Albanian, Croat or another small minority group.

Trust in Political Parties
(percentage)

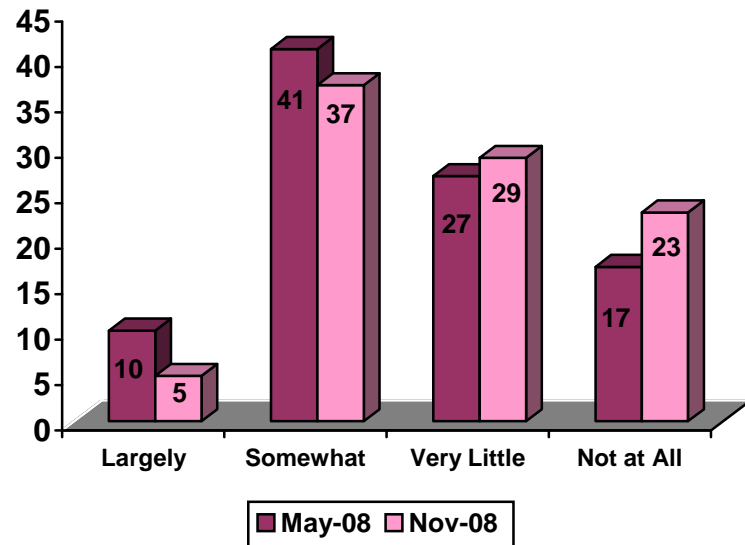


Opposition Readiness to Cooperate
(percentage)

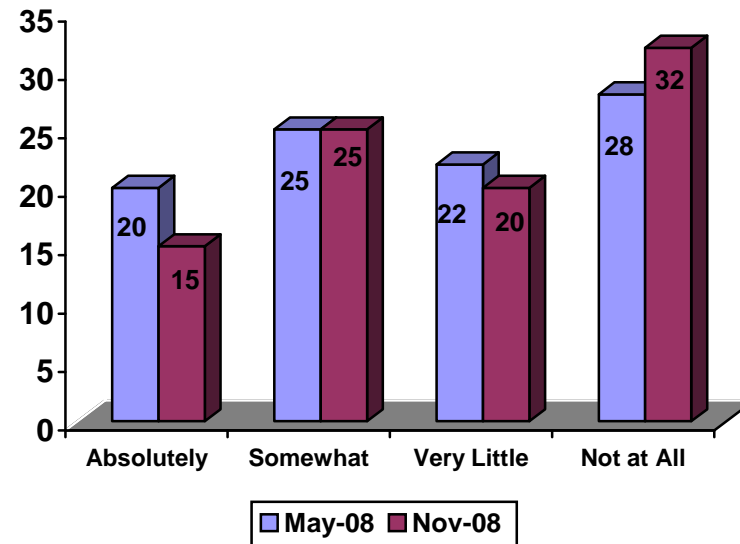


Since May, there are 9 percent fewer respondents (only 42 percent) willing to say that MPs represent citizens' interests largely or somewhat. While self-identified Bosniaks are quite satisfied, the most disappointed are self-identified Serbs of which one-third say that MPs do not represent citizens at all. In addition, a greater proportion (38 percent) of self-identified Albanians, Croats and other small minority groups think MPs represent citizens only a very little. Similarly, confidence in the fact that an MPs salary corresponds to their workload fell in November to 40 percent (a 5 point decline) with the most skeptical being those living at the Coast (44 percent), self-identified Serbs (41 percent), students and unemployed at 38 percent each, and those with little or no income at 30 percent.

Representation of Citizens' Interests in Parliament



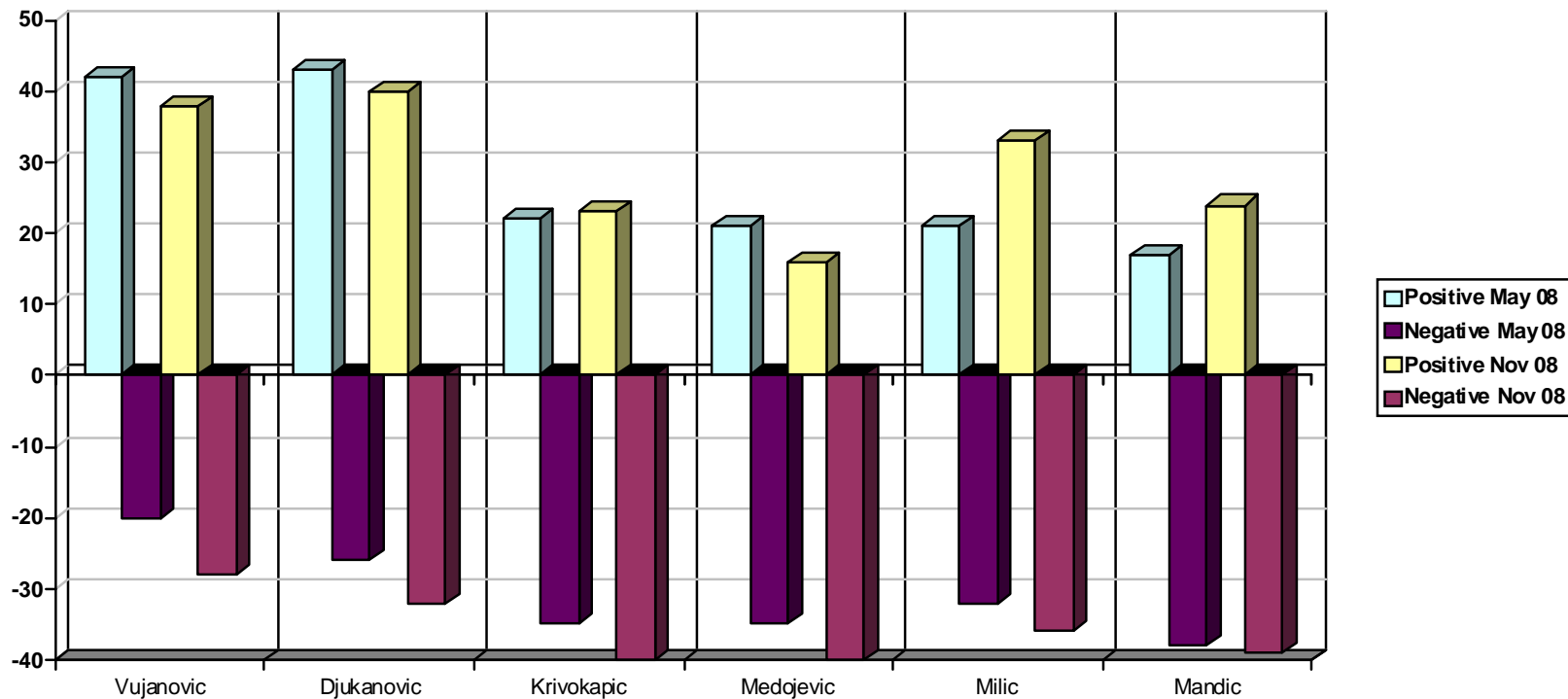
Salary of MP Corresponds to Work?



Attitudes toward Political Leaders

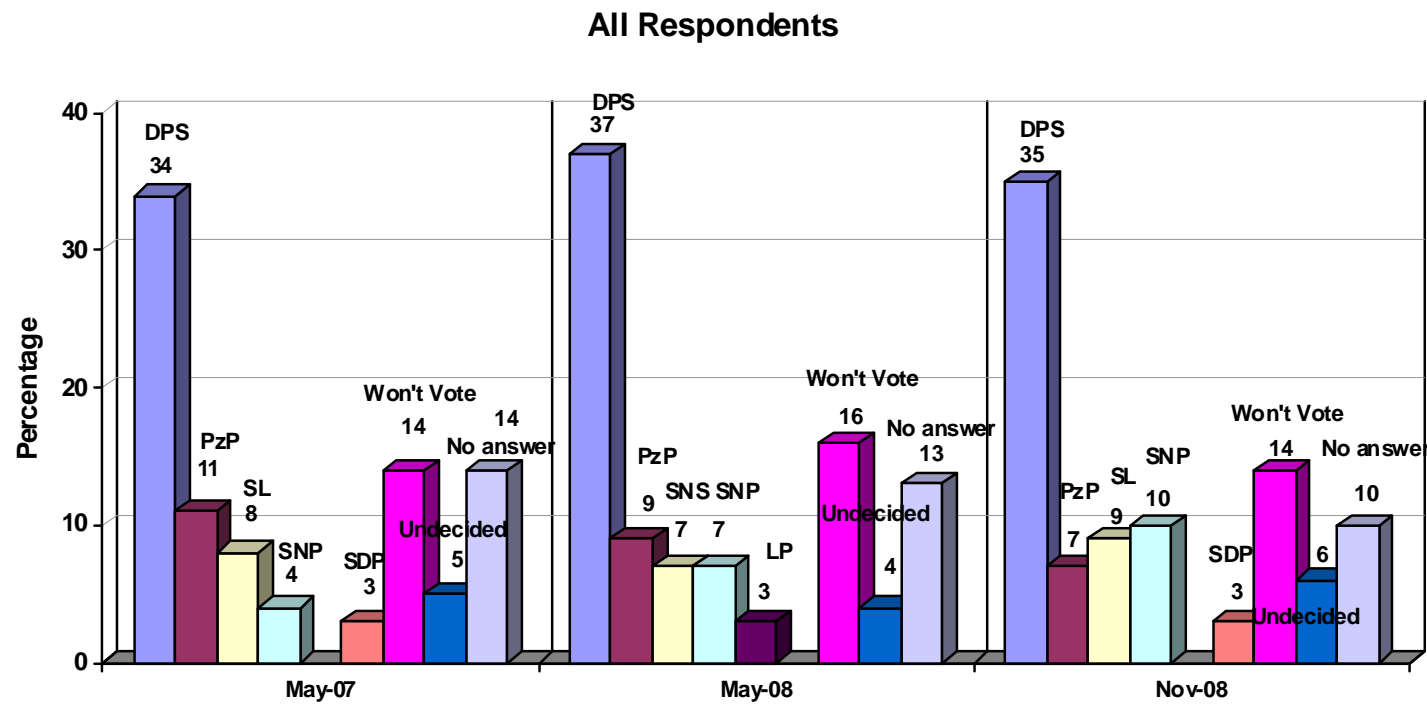
The attitude toward the leaders of the major political parties has not changed much since May. The most significant change is a 12 percent increase in the positive ratings of SNP president Srđan Milić. Also, a greater number of those living in villages have positive feelings about Prime Minister Milo Đukanović and SNS president Andrija Mandić and negative attitudes toward Milić and PzP president Nebojša Medojević.

Attitude toward Key Political Leaders
All Respondents



VOTE INTENTION

Respondents were asked: “If parliamentary elections were held this week, for which party would you probably vote?” The chart below displays the results for those parties chosen by more than 3 percent of respondents in May 2007, May 2008 and November 2008.



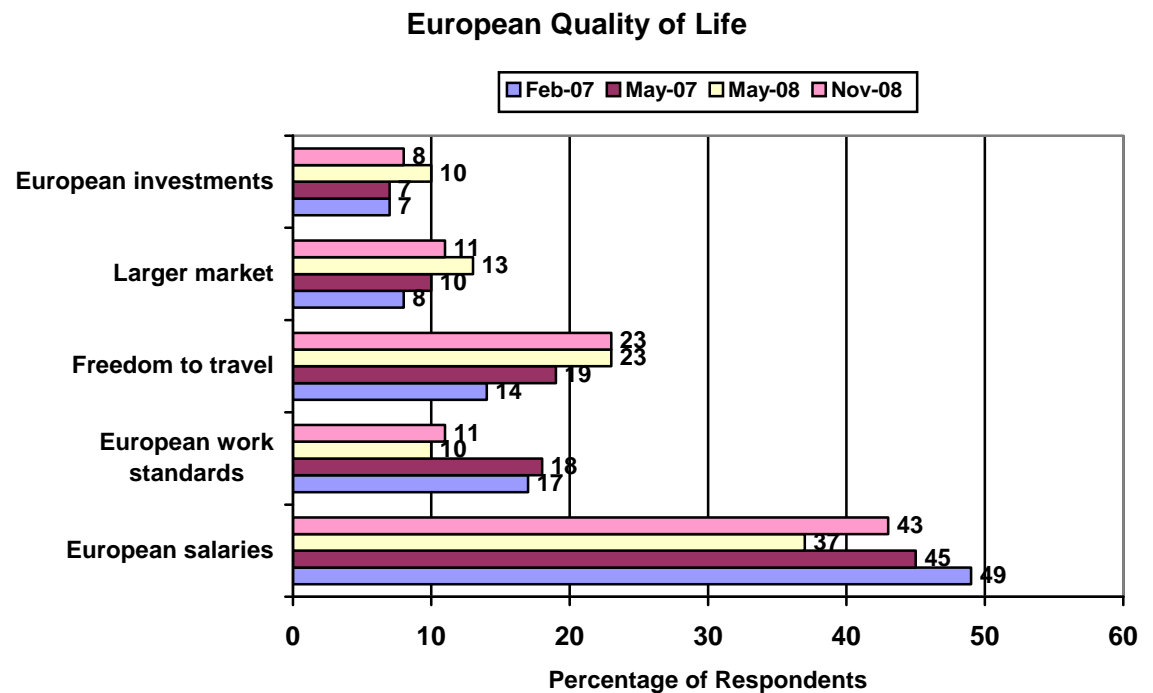
* All other parties received less than 3 percent of support among respondents sampled.

ATTITUDES TOWARD EURO-ATLANTIC INTEGRATION

With a larger number of self-identified Serbs (68 percent) and self-identified Albanians, Croats, and other small minority groups (69 percent), 58 percent of all respondents agree that **“Joining the European Union might be important for Montenegro’s international relations, but it will not have much affect on the lives of people in the near future.”**

An additional 6 percent of respondents in November consider European salaries as the meaning of a European quality of life, which includes a majority (50 percent) of those living in central municipalities. At 31 and 38 percent, respectively, self-identified Muslims and Bosniaks look forward to the freedom to travel as do 35 percent of those without income and 36 percent of those earning 201-300€ per month.

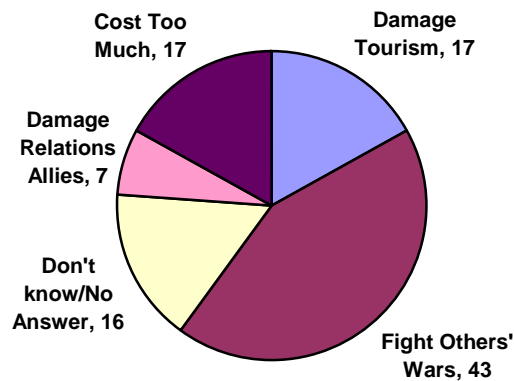
A majority (56 percent) of respondents considers relations with the European Union to be most important for Montenegro, which includes 66, 71, and 79 percent, respectively, of self-identified Montenegrins, Muslims, and Bosniaks. Still, one-third of those under the age of 40 identify the United States as Montenegro’s most important partner, and almost one-half (45 percent) of self-identified Serbs pick Russia.



NATO Alliance

In a simple ‘yes-no’ question, a majority (54 percent) responded that Montenegro should not become a member of the NATO Alliance, which includes a greater number of self-identified Serbs (86 percent). Those who answered negatively were asked to identify the biggest disadvantage of membership and four in 10 chose ‘having to fight other people’s wars.’ As the primary benefits, a little more than two thirds of those who were positive about NATO membership identified either regional stability or another step toward the European Union.

Disadvantages of NATO Membership
(percentage)



Benefits of NATO Membership
(percentage)

