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Resilient nations.*

Public Pulse XIII

October 2017

Prepared by UNDP Kosovo - *Public Pulse Project team*

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The views expressed in this document are those of the opinion poll respondents and do not necessarily represent the views of either UNDP or USAID.

Executive Summary

This is the thirteenth Public Pulse Brief; it is based on the survey conducted during late September and early October 2017, and follows the tradition of previous briefs that examine the evolving situation in Kosovo¹ in its key aspects.

The latest poll results show an increase in satisfaction with performance of Kosovo institutions; approximately 36% of Kosovans declared to be satisfied with the legislative, executive, and judicial institutions combined (as compared to 21% in October 2016). While the overall satisfaction levels with Kosovo's political orientation remains low, the October 2017 poll demonstrates moderate increase (14% compared to 8% in October 2016). The perception of the citizens about safety has also increased by approximately ten percentage points.

Similarly, the Public Pulse Democratization Index (DI) and Economic Confidence Index (ECI), which track Kosovars' opinions of democratic practices (voting, freedom of expression, etc.) and perceptions of prevailing economic conditions both experienced an increase, but remain low. On a scale of 0, being the lowest, to 3, being the highest scores, the DI scored 1.37 and the EI scored 1.22. Despite the reported fluctuations in citizen perceptions, overall satisfaction levels with the performance of key Kosovo institutions remains rather low. Through the Public Pulse Poll citizens were asked to identify the paramount problems that Kosovo is facing today. Among others, citizens reported unemployment (40% as compared to 48% in October 2016), corruption (17% as compared to 7% in October 2016) and poverty (9% as compared to 21% in October 2016), as the biggest issues which affect their social wellbeing.

Besides highlighted paramount problems, 42% of Kosovans - the highest level since April 2014 - declared to be satisfied with the work of the Prime Minister. Whereas when comparing current results, with those of previous year, the increase in people's satisfaction is also noted with the President's performance (38%, as compared to 26% in October 2016). Similarly, the Assembly and the Speaker of the Assembly have both seen their highest levels of satisfaction since April 2014. The current poll also marks the highest increase, since April 2014, in the level of satisfaction with

¹ For UNDP, references to Kosovo shall be understood to be in the context of Security Council Resolution 1244 (1999).

the work of the Courts and Prosecutor's Office. In addition to the findings highlighted above, the present brief discusses other findings in order to provide an in-depth overview of the current situation in Kosovo.

Public Pulse Key Indicators

Perceived Satisfaction with the Performance of Kosovo's Institutions

The results of the present Public Pulse Poll show a general increase in people's satisfaction with the work of key institutions in Kosovo. About 36% of Kosovans seem to be satisfied with the legislative, executive, and judicial institutions combined. Between October 2016 and October 2017, satisfaction levels with the work of the Prime Minister and that of the central institutions increased by approximately 22 and 12 percentage points respectively, reaching highest levels since April 2014. Moreover, levels of satisfaction with the work of legislative institutions, such as the Assembly and the Speaker of the Assembly, also increased by approximately 13 and 11 percentage points. Similarly, the citizens' satisfaction with President's performance has also seen an increase of approximately 12 percentage points. The judiciary is no exception to this overall increase in people's satisfaction with the work of Kosovo's key institutions as the satisfaction level with the work of Kosovo courts has increased by approximately 15 percentage points since October 2016. The level of satisfaction with the work of the Prosecutor's Office also increased by approximately 17 percentage points, bringing it to a high level of 33% as compared to only 16% in October 2016 (*Table 1*).

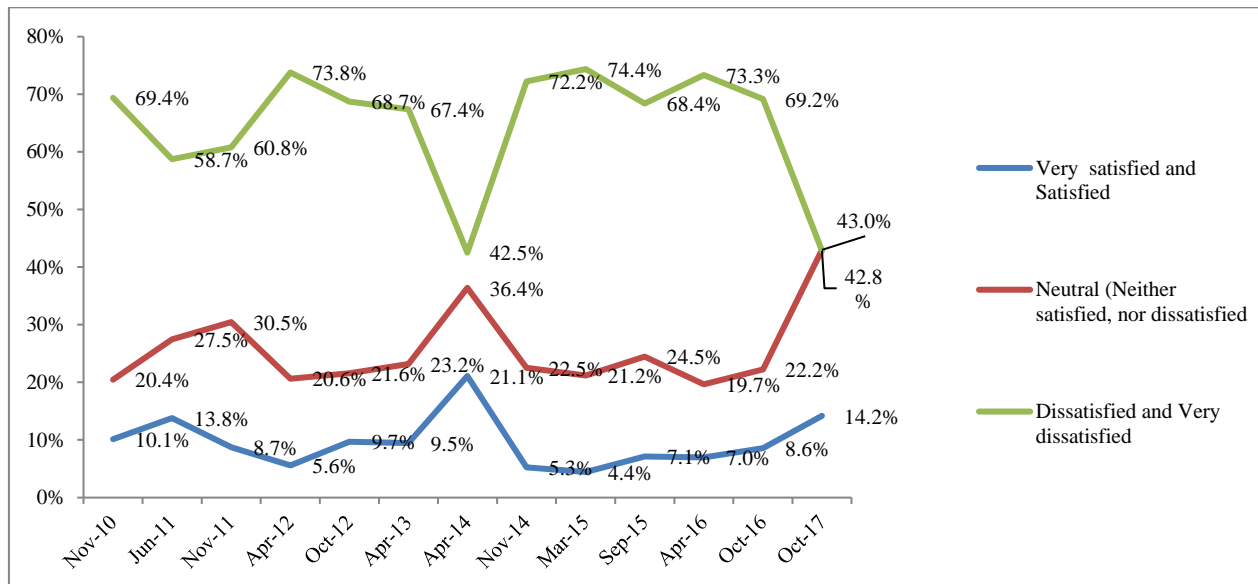
Table 1: Satisfaction levels with Kosovo's key executive, legislative, and judicial institutions

Political Indicators		Mar-07	May-08	Jun-09	Apr-10	Nov-10	Jun-11	Oct-12	Apr-13	Apr-14	Nov-14	Mar-15	Sep-15	Apr-16	Oct-16	Oct-2017	Trend
Satisfaction with executive	Central Institutions	30.5%	46.9%	53.1%	29.2%	25.1%	32.6%	27.2%	27.0%	44.2%	19.3%	18.1%	17.3%	17.8%	20.2%	32.4%	
	Prime minister	54.0%	72.0%	53.8%	36.4%	30.7%	37.6%	27.3%	30.4%	48.5%	34.1%	23.6%	14.6%	18.3%	19.7%	42.3%	
Satisfaction with legislative	Assemble	31.0%	51.4%	53.2%	34.1%	32.1%	41.0%	32.1%	32.3%	46.5%	16.1%	19.3%	19.9%	17.3%	18.9%	31.7%	
	Speaker of Assemble	35.4%	56.5%	51.6%	36.0%	33.3%	60.9%	44.7%	45.8%	57.8%	23.3%	20.1%	19.8%	24.3%	24.9%	36.0%	
Satisfaction with President	President	52.0%	74.0%	61.7%	54.9%	30.8%	54.1%	47.1%	45.1%	48.8%	40.7%	30.2%	30.4%	45.7%	25.5%	37.6%	
Satisfaction with judiciary	Court	20.0%	21.0%	32.7%	27.2%	18.5%	26.9%	24.3%	16.7%	37.5%	22.8%	17.2%	13.9%	18.4%	22.1%	36.9%	
	Prosecutor's office	22.7%	22.7%	31.7%	26.9%	15.1%	20.0%	15.0%	17.7%	38.1%	21.0%	17.0%	12.8%	16.9%	16.3%	33.1%	

Perceptions of Kosovo's Political and Economic Direction

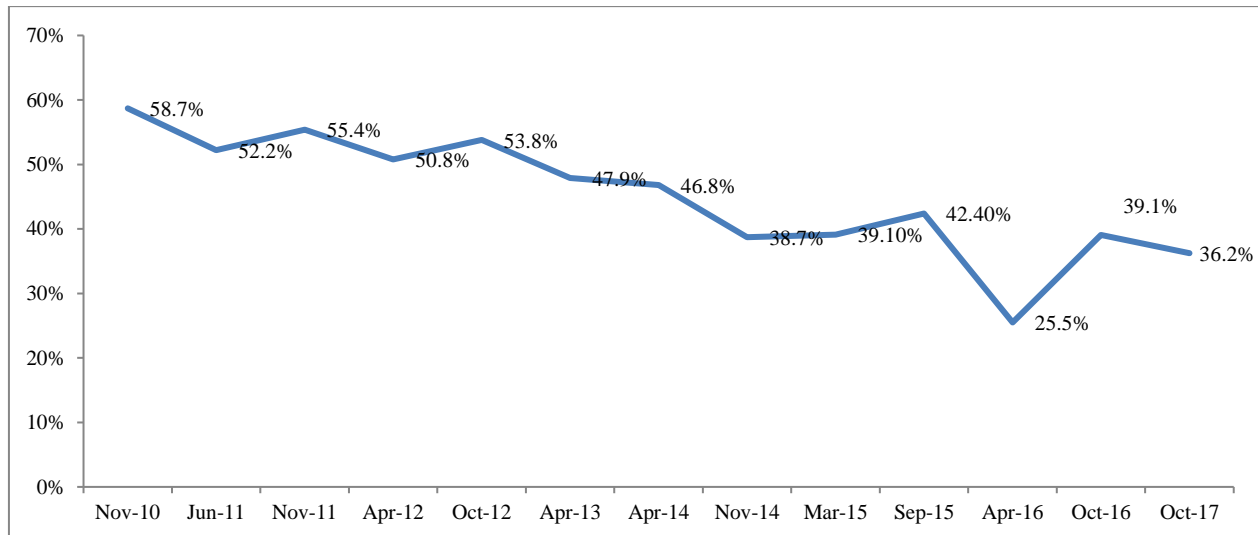
While a significant number of Kosovans seem to be satisfied with the work of main institutions the picture changes when they are asked about their satisfaction with the political direction in which Kosovo is headed. Only about 14% of Kosovans seem to be either satisfied or very satisfied with Kosovo's current political direction, while almost half of them (43%) seem to be either dissatisfied or very dissatisfied with Kosovo's political direction. Similarly, almost 43% of Kosovans declared to be neutral about this issue (*Figure 1*).

Figure 1: Satisfaction with Kosovo's political direction

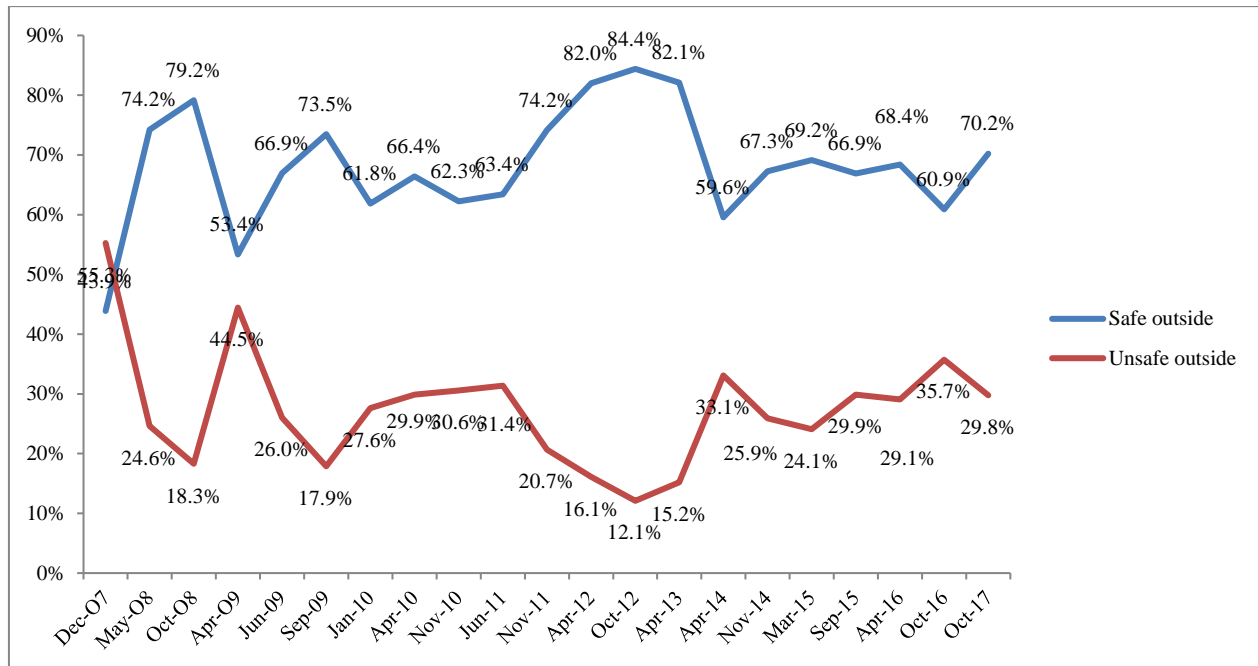


Although citizens' dissatisfaction with Kosovo's political direction decreased significantly in comparison to 2016, current findings indicate that 36% of Kosovans are still willing to join public protests for political reasons. When analysing these findings along ethnic lines, a higher percentage of K-Albanians (38.5%) than of K-Serbs (6%, compared to 39.5% in October 2016) are willing to join protests for political reasons. Only 14% of members of other ethnic groups (compared to 28% in October 2016) declared to be willing to protest for political reasons (*Figure 2*).

Figure 2: Percentage of respondents who would join protests for political reasons

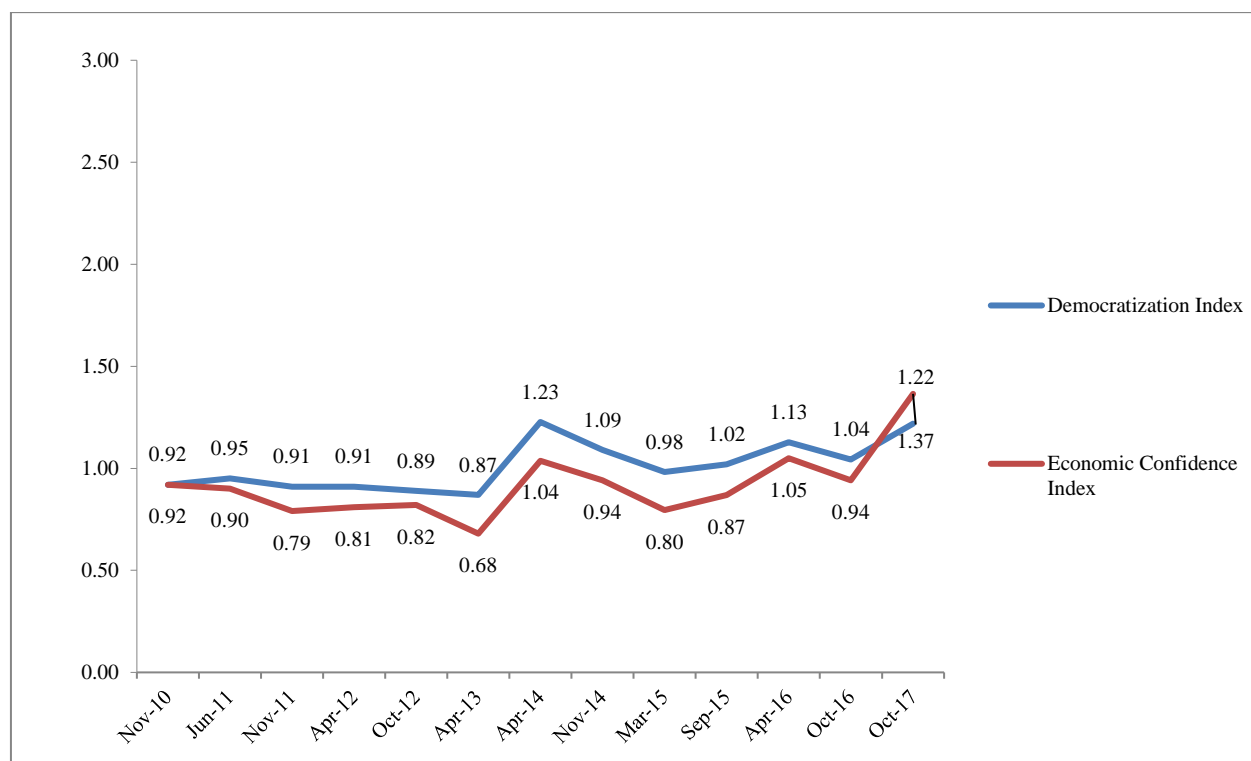


As an indicator of security, respondents were also asked whether they feel safe or unsafe while out on the streets. The data from October 2017 show a decrease in the number of people who feel unsafe as only 31% of Kosovans declared that they felt unsafe while outdoors (as compared to 36% in October 2016). A total of 70% of respondents declared to feel generally safe while outdoors (as opposed to 61% in October 2016) (*Figure 3*). When this data was analysed by gender, no significant differences were noted between the percentage of women and men who declared to feel safe in the streets (*Figure 3*).

Figure 3: Perception of safety

Democratization and Economic Confidence Indices

The October 2017 opinion poll results show that the DI (1.37) has reached the highest level since November 2010, with an increase of about 0.33. No significant differences were noticed among the opinions of men and women concerning democratization processes in Kosovo. However, since the DI ranges from 0 to 3, the current DI levels indicate that the majority of Kosovans do not have positive opinions about the democratic processes. Economic Confidence Index (ECI) ranges between 0 and 3 where an ECI of 0 to 1.5 means majority of Kosovans have no confidence in the economy (they view economic conditions unfavourably and they are less optimistic about the future of the economy) and where an ECI of 1.5 and above means majority of Kosovans have confidence in the economy (they view economic conditions favourably and they are more optimistic about the future of the economy). The current Public Pulse poll data shows Kosovo's overall ECI at 1.22 (as opposed to 0.94 in October 2016), indicating positive increase since last year. However, this still does not mean that Kosovans have a favourable opinion on the economy (Figure 4).

*Figure 4: Democratization and Economic Confidence Indices*²

In order to determine which indicators impacted the increase of DI, October 2016 data were compared with those of the current survey. The following DI components found their place among those which impacted the general increase: the media enjoys the freedom of expression (52% as compared to 42% in October 2016), the independence of judiciary system in Kosovo (31% as compared to 22% in October 2016), and that Kosovo Constitution and valid laws are democratic and respect the human rights (41% as compared to 32% in October 2016). While in October 2016 only 28% of respondents believed that elections in Kosovo are democratic and held in accordance with international standards, 45% of respondents believed so in October 2017³. Other components that showed a significant increase in citizens' perceptions include: citizens' trust that central institutions are working according to the priorities of Kosovo citizens (25%) and that the Assembly monitors the central institutions' performance (36%) (*Table 2*).

² See the last page of the document for more information on the calculation of indexes.

³ The current poll took place after the central elections in Kosovo (11th of June 2017) but before municipal ones (22 October 2017).

Table 2: Trend analysis of DI components

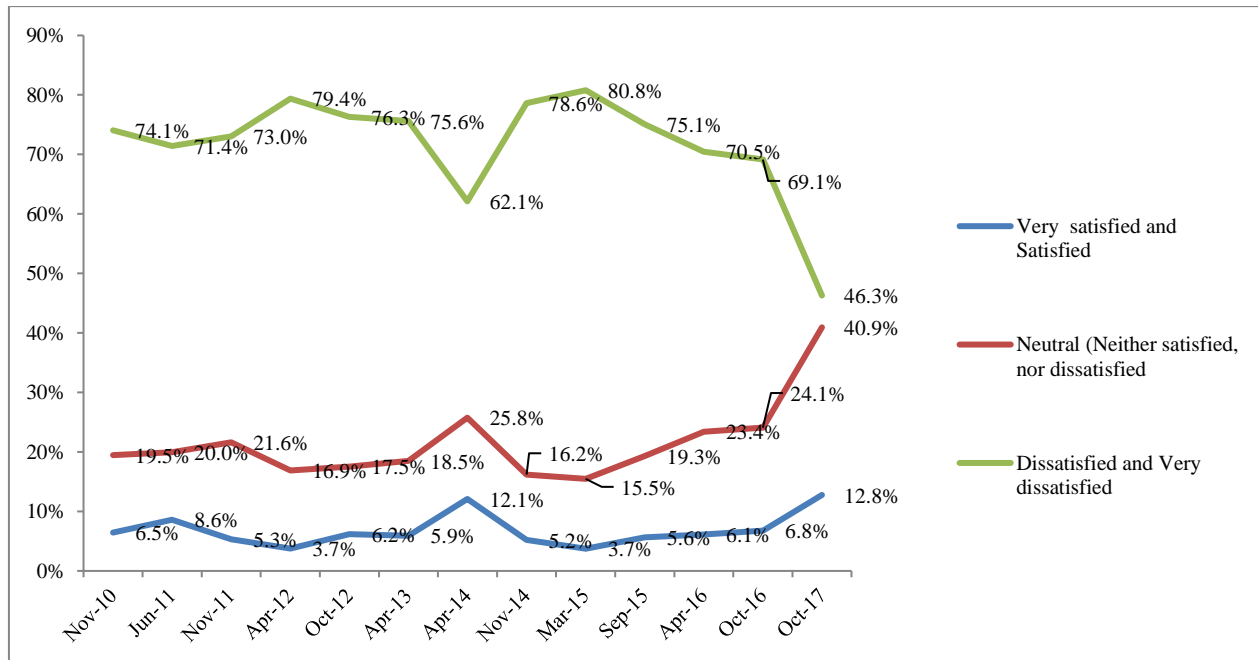
Yes Mainly and Yes fully	Nov-10	Jun-11	Nov-11	Apr-12	Oct-12	Apr-13	Apr-14	Nov-14	Mar-15	Sep-15	Apr-16	Oct-16	Oct-17	Trend
Are the elections in Kosovo democratic and in accordance with international standards?	31.0%	29.3%	23.1%	17.0%	16.2%	15.0%	36.4%	34.0%	26.2%	23.0%	30.3%	28.0%	44.6%	
Does the Parliament monitor the performance of Central Institutions?	20.7%	20.7%	19.4%	16.7%	17.7%	17.5%	28.5%	21.5%	21.2%	21.8%	26.6%	30.8%	36.1%	
Is Judiciary System in Kosovo independent on its decisions?	13.2%	15.6%	11.3%	12.3%	15.7%	10.6%	24.8%	16.0%	13.6%	17.6%	21.0%	21.6%	31.2%	
Does media in Kosovo enjoys the freedom of expression?	29.2%	33.9%	33.3%	34.7%	37.3%	24.6%	45.4%	39.6%	35.5%	46.5%	47.3%	42.3%	52.5%	
Does Civil Society in Kosovo serve as, a truthful monitor of democratic developments in Kosovo?	22.6%	18.9%	20.3%	19.0%	24.4%	18.3%	28.8%	21.3%	19.5%	23.1%	32.1%	30.1%	34.3%	
Is your Local (municipal) Government working according to priorities of Kosovo citizens?	27.7%	26.7%	29.0%	25.7%	27.3%	26.1%	32.6%	29.5%	23.3%	27.2%	28.9%	30.4%	34.0%	
Are Central Institutions in Kosovo working according to priorities of Kosovo citizens?	14.3%	16.1%	14.6%	12.9%	15.3%	16.4%	26.4%	18.2%	11.8%	15.5%	18.9%	17.9%	24.7%	
Is Kosovo Constitution as well as Laws in power democratic and do they respect the Human Rights?	32.6%	27.9%	26.5%	25.9%	26.0%	33.0%	35.3%	24.2%	23.5%	19.8%	31.7%	31.8%	41.4%	
Regardless of daily politics and looking forward to the future, do you agree that the democratic processes in Kosovo are instituted and are going towards the right direction?	25.6%	24.5%	17.9%	18.1%	18.6%	23.0%	33.0%	19.5%	17.3%	15.4%	23.1%	23.8%	29.7%	

Similarly, the current affirmative responses of the ECI component were compared with those from October 2016. Here, it is also noted that all components had a part to play in the general increase. The results reveal that Kosovans' positive short-term expectations (six month) regarding their families' total incomes and employment conditions has been increased to 22% and 19%, respectively. In addition, their assessment regarding the current business and employment conditions also increased by 18% and 19% respectively, as compared to October 2016 (*Table 4*).

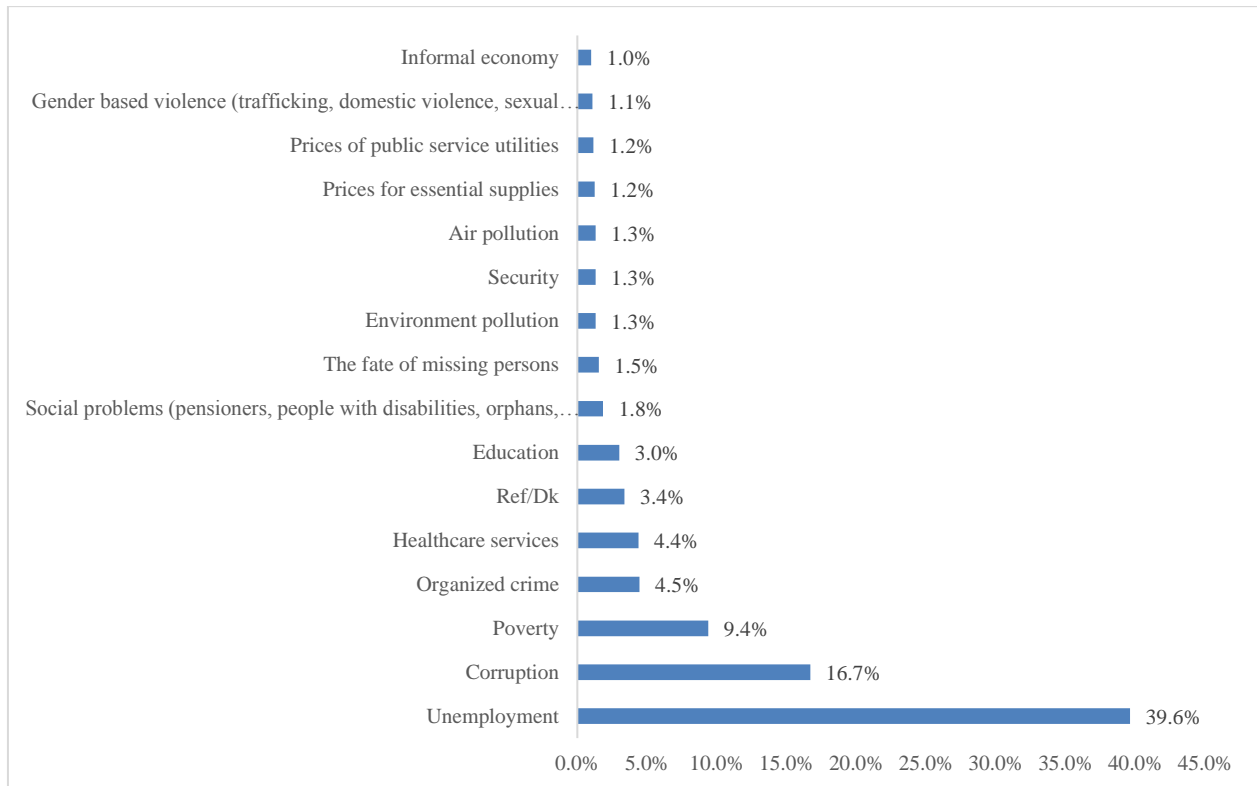
Table 3: Trend analysis of ECI components

Favourable	Nov-10	Jun-11	Nov-11	Apr-12	Oct-12	Apr-13	Apr-14	Nov-14	Mar-15	Sep-15	Apr-16	Oct-16	Oct-17	Trend
What are your expectations regarding your family's total income six months from now	16.8%	12.1%	8.5%	9.9%	9.6%	7.6%	17.0%	19.7%	15.1%	15.9%	23.4%	18.0%	22.4%	
What is your assessment of the current business conditions	10.7%	9.7%	6.0%	7.9%	6.7%	4.8%	11.6%	8.8%	8.1%	8.3%	14.4%	13.1%	17.9%	
What is your assessment of the current employment condition	4.0%	3.3%	3.8%	3.4%	3.8%	5.1%	9.2%	7.7%	5.0%	6.8%	10.3%	7.7%	17.1%	
What are your expectations regarding employment condition six months from now	14.3%	12.4%	8.0%	7.6%	7.4%	6.4%	13.7%	7.3%	6.0%	8.0%	14.0%	10.7%	18.7%	

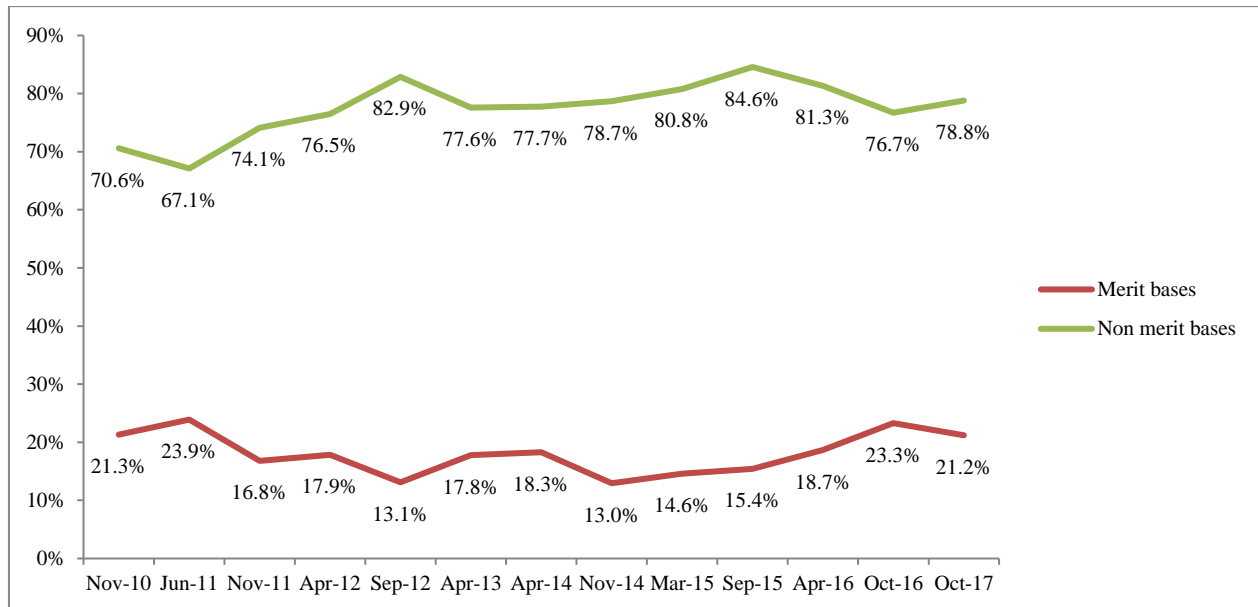
Even though the increase in ECI is notable, the findings highlight that there is more dissatisfaction with the economic direction than political direction of Kosovo: approximately 46% of respondents are either dissatisfied or very dissatisfied with Kosovo's current economic direction, while only about 18% are satisfied. When analysed on ethnic basis, the opinion poll data indicate that the proportion of dissatisfied K-Serbs (57%, as compared to 63% in October 2016) remains higher than that of K-Albanians (47%, as compared to 69% in October 2016) and K-other communities (20%, as compared to 73% in October 2016) (*Figure 5*).

Figure 5: Satisfaction with Kosovo's economic direction**Perception of Paramount Problems Currently Facing Kosovo**

More than 65% of Kosovans consider that the largest problems facing Kosovo today are related to the socio-economic conditions. Respondents selected unemployment (40% as compared to 48% in October 2016), corruption (17% as compared to 7% in October 2016), and poverty (9% as compared to 21% in October 2016) as three biggest issues which impact their social wellbeing. This poll also showed that around 4% of Kosovans consider organized crime and healthcare services among other pressing concerns (*Figure 6*).

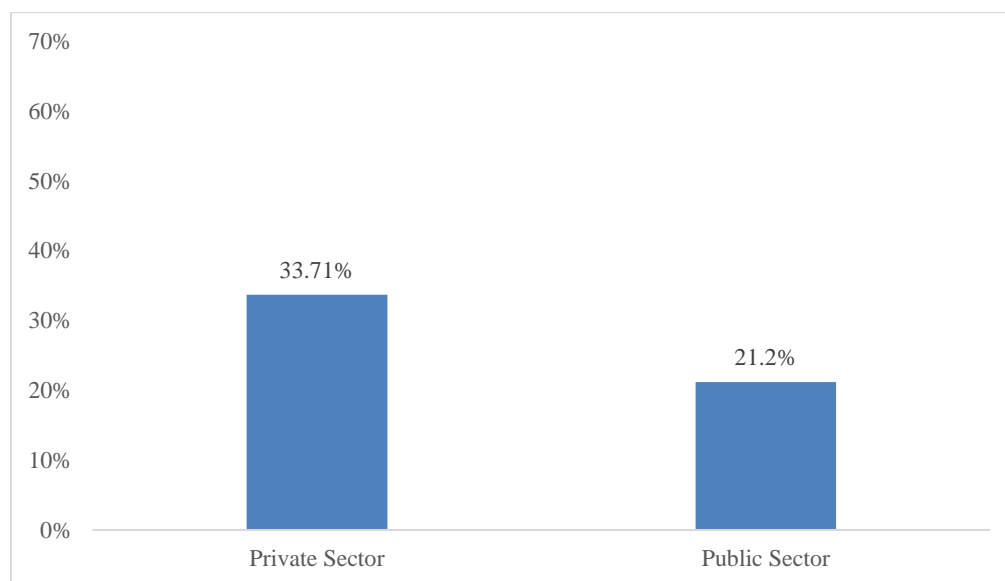
Figure 6: Perception of paramount problems Kosovo faces

Since Kosovans perceived unemployment as the biggest problem, they were asked about their opinions about the merit-based employment possibilities in the public sector. The findings reveal that majority of Kosovans remain sceptical about merit-based employment in the public sector. Given that the public sector is the largest employer in Kosovo, this explains why only 19% of respondents are optimistic about finding employment in the next six months (*Table 3*). Furthermore, majority of Kosovans (79%) believe that family connections, bribes, party alliances, and other non-merit based factors are most helpful in gaining employment in the public sector. Only around 22% of respondents believe that education, professional experience, and vocational training help to effectively gain employment in the public sector (*Figure 7*).

Figure 7: Perceptions of meritocracy in gaining employment in the public sector

Majority of Kosovans remain sceptical about merit based employment in the private sector as well. Nevertheless, the findings reveal that the perceptions on the merit based employment in private sector stand a little bit better, 34% of respondents believe that professional experience, vocational training, and education are important for gaining employment in the private sector. Overall, perceptions on merit-based employment opportunities remain on the low levels for both private and public sectors (*Figure 8*).

Figure 8: Perceptions of meritocracy in gaining employment in the public sector



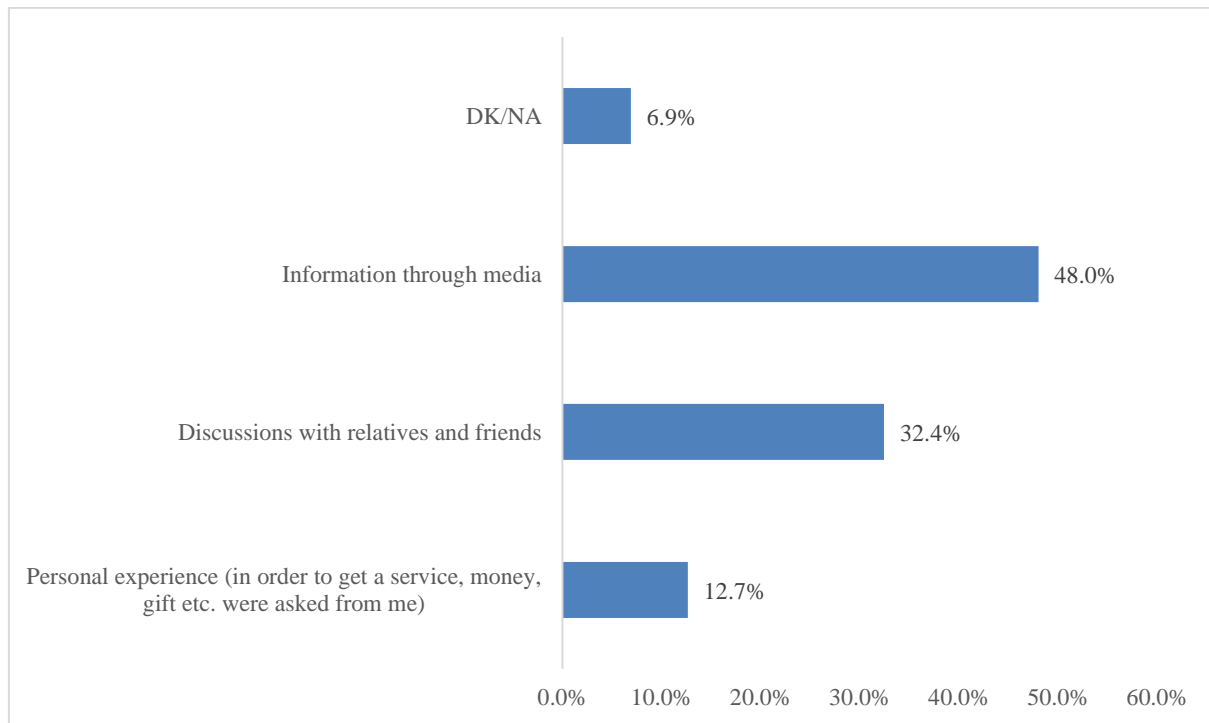
Even though the corruption continues to remain a phenomenon that Kosovan society is worried about, the overall percentage of citizens who perceive that the large-scale corruption is present in various institutions has decreased (20% as compared to 36.5% in October 2016). Institutions that Kosovans perceive to have the highest prevalence of large-scale corruption are: healthcare providers 25.5% (as compared to 50% in October 2016), Kosovo Electricity Distribution Company (KEDS) 20.5% (as compared to 31% in October 2016), the courts 25% (as compared to 49% in October 2016), customs 23% (as compared to 45% in October 2016), and central administration 31% (as compared to 49% in October 2016). Although generally the percentages have decreased for several institutions, the Kosovo Police (15% as compared to 21% in October 2016), international organizations (10%), and banks (10%) remain as the institutions with the least perceived large-scale corruption (*Table 4*).

Table 4: Perceptions of the prevalence of large-scale corruption in national and international institutions in Kosovo

	Nov-10	Jun-11	Nov-11	Apr-12	Oct-12	Apr-13	Apr-14	Nov-14	Mar-15	Sep-15	Apr-16	Oct-16	Oct-17	Trend
Healthcare (hospitals and family healthcare centers)	47.9%	40.7%	49.8%	43.3%	51.6%	50.4%	40.4%	56.2%	52.6%	51.5%	37.9%	49.7%	25.5%	
KEDS (Kosovo Energy Distribution Services)	52.4%	47.9%	61.2%	47.8%	53.8%	48.8%	24.4%	39.1%	44.7%	35.6%	31.1%	31.4%	20.5%	
Courts	49.7%	41.6%	55.6%	44.5%	47.5%	56.4%	32.2%	42.1%	42.9%	46.9%	42.3%	49.3%	24.9%	
Customs	45.1%	42.3%	53.7%	43.2%	49.9%	58.9%	22.5%	33.4%	38.7%	41.3%	32.3%	45.2%	22.7%	
Central administration	47.5%	41.4%	43.3%	39.5%	35.7%	46.1%	24.0%	37.5%	38.5%	36.0%	36.6%	49.2%	30.7%	
PAK (Privatization Agency of Kosovo)	52.0%	40.5%	51.9%	49.4%	46.4%	48.7%	24.6%	34.8%	37.1%	38.3%	39.2%	45.7%	24.9%	
Municipalities (local government)	32.9%	30.4%	31.9%	30.1%	32.2%	38.9%	20.6%	33.2%	33.8%	28.6%	30.0%	40.2%	25.5%	
EULEX police (CIVPOL)	22.9%	26.2%	27.1%	28.3%	28.7%	38.3%	11.1%	16.5%	32.2%	35.2%	28.8%	34.1%	20.9%	
Education (schools, University)	14.4%	13.1%	17.3%	26.2%	23.5%	31.6%	13.0%	24.3%	29.3%	29.0%	17.5%	31.0%	16.3%	
TAK (Tax administration of Kosovo)		24.9%	36.5%	38.1%	33.6%	42.5%	16.5%	28.0%	28.1%	25.0%	18.2%	32.5%	17.4%	
PIK	34.0%	32.4%	46.6%	41.8%	45.1%	41.4%	15.4%	21.3%	25.9%	25.2%	18.4%	29.6%	17.0%	
Banks	14.4%	14.9%	22.0%	20.5%	22.8%	37.5%	12.0%	17.0%	24.3%	23.3%	23.1%	24.4%	13.1%	
International organizations	14.7%	12.3%	20.3%	19.3%	20.8%	24.8%	10.8%	16.2%	20.4%	22.9%	16.0%	28.0%	10.8%	
Kosovo Police (KP)	15.2%	15.5%	19.5%	19.4%	28.0%	30.3%	11.5%	16.1%	20.4%	19.0%	13.6%	21.1%	14.9%	

In order to understand what shaped perceptions of Kosovans regarding the presence of large-scale corruption in local and international institutions in Kosovo, the respondents were asked where they obtained information on this issue. The findings reveal that almost half of them (48%) formed their opinions through print and electronic media, followed by conversations with friends and relatives (32%), and through other sources (7%). However, 13% of respondents declared that they formed their opinions based on personal experiences where, in order to receive certain services, they were asked for money, gifts or other favours (*Figure 9*).

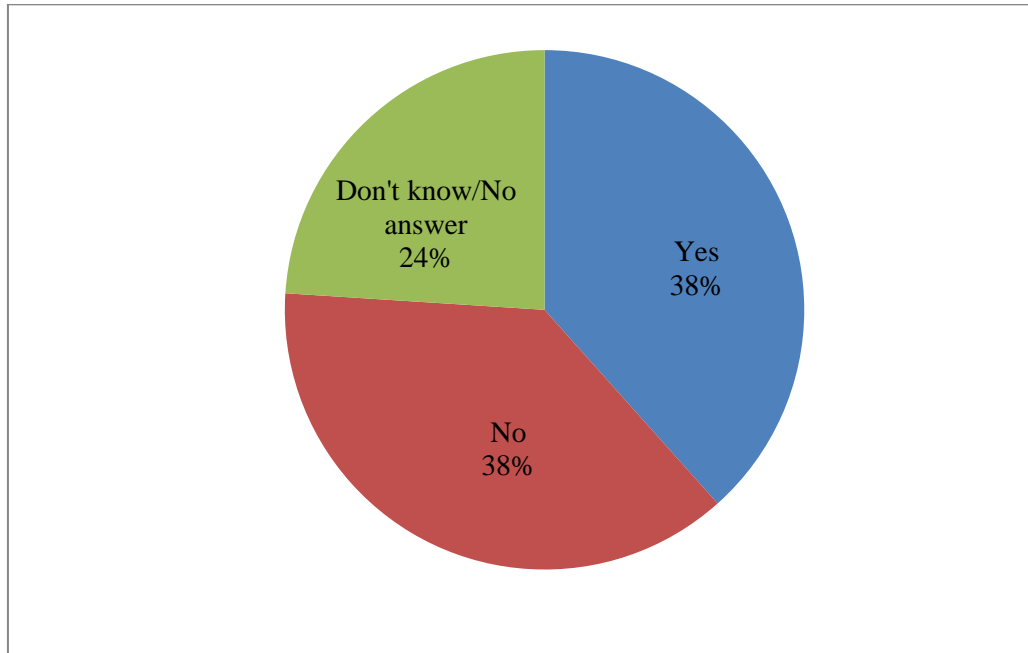
Figure 9: On what do you base your evaluations about the extent of large-scale corruption?



Attitudes towards voting

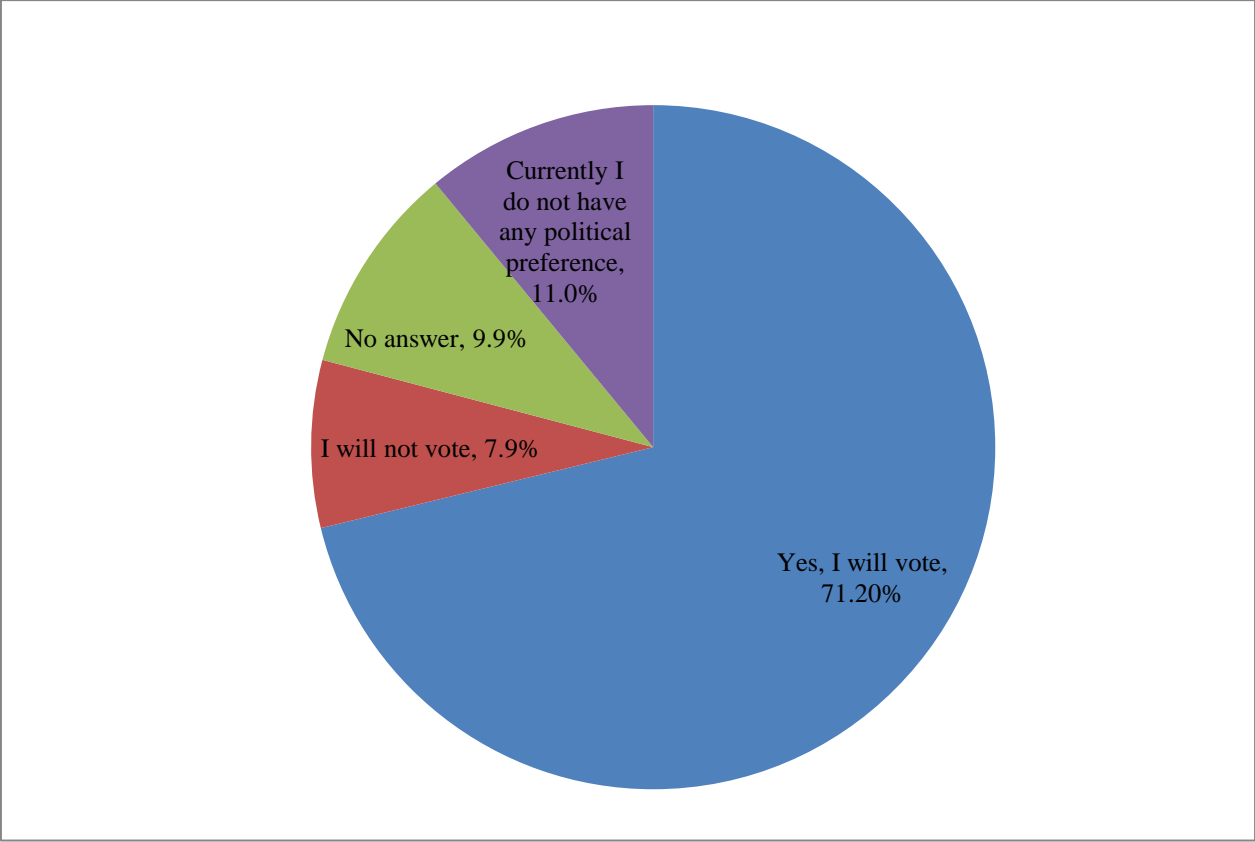
Intentions to vote are important to understand society's general political mood. Unfortunately, the latest survey results reveal attitudes on voting among Kosovans are pessimistic where a significantly high number of respondents believe that their vote cannot change the situation in Kosovo (38% as compared to 52% in October 2016) or do not know whether their vote can change the situation in Kosovo (24%). Only 38% of potential voters believe that their vote can change the situation in Kosovo (*Figure 10*).

Figure 10: Perceptions of one's ability to make change through voting



The Public Pulse survey also asked the respondents about their voting preferences. Findings indicate that 71% of respondents (as compared to only 36% in October 2016) would vote for a particular political party or a coalition if the central elections were to take place in the near future, while 11% of respondents did not have any political preferences. Furthermore, there is a significant percentage of those who stated that they will not vote in case of central elections (8% as compared to 22% in October 2016) and those that did not answer this question (10% as compared to 27% in October 2016) (*Figure 11*).

Figure 11: Voting preferences



Methodology

The findings presented in this Brief are based on an opinion poll which surveyed 1,305 Kosovan citizens over the age of 18. The sample included both men and women from all Kosovan municipalities and regions, covering both rural and urban areas. Specifically, the sample included 895 Kosovo Albanians, 210 Kosovo Serbs, and 200 Kosovo non-Serb minorities (namely Turkish, Bosnian, Gorani, and Roma, Ashkali and Egyptian community/RAE). The survey was conducted based on a multi-staged random probability sampling. The sample is representative of households in Kosovo. The survey was conducted during September and early October 2017. Additional data obtained through this poll will be made available through Public Pulse Analysis and Action Paper documents.

Note for Weighting the Totals

Public Pulse surveys oversample minorities in order to disaggregate data by ethnicity. However, when calculating total numbers, the team weighed data by actual population figures.

Since 2002, we have used the following percentages for weighing the totals for Kosovo's population:

- K-Albanians 88%,
- K-Serbs 6%, and
- Others (Bosnians, Turks, Gorani, RAE) 6%.

According to the latest registration of the population and official results from the Kosovo Agency of Statistics, the current ethnic composition is as follows:

Ethnicity	Population	Percent
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K-Albanian	1,616,869	92.93
K-Serb	25,532	1.47
K-Turk	18,738	1.08
K-Bosnian	27,533	1.58
Roma	8,824	0.51
Ashkali	15,436	0.89
Egyptian	11,524	0.66
Gorani	10,265	0.59
Others	2,352	0.14
Total	1,739,825	100.00

If we were to follow the above figures for our surveys, the weighting would be as follows:

- 93% K-Albanians,
- 2% K-Serbs, and
- 5% K-others.

Taking into consideration that K-Serbs in the northern Kosovo did not participate in the population census, along with the general observation that the participation rate of K-Serbs in the rest of Kosovo was lower, we have estimated a need to add another 34,000 K-Serbs, bringing the total to around 61,532. This also increases the total Kosovo population to 1,779,825.

When these changes are taken into consideration, the weighting in our surveys was applied in the following manner:

- 92% K-Albanians,
- 4% K-Serbs, and
- 4% K-others (Bosnians, Turks, Gorani, RAE).

Calculation of Indexes

The Democratization Index is a composite average based on the evaluation of the respondents' level of agreement or disagreement regarding developments in the following processes in Kosovo: extent of free and fair elections, Assembly monitoring, the performance of central institutions, independence of the judiciary system, freedom of expression and media, existence of a watchdog civil society in Kosovo, operation of institutions based on the priorities of citizens, constitution and laws based on human rights, and whether local governments work according to the priorities of citizens. This Index is a continuous measure which can range from 0 -3 (maximum), where a score of 0 means that none of the respondents consider democratization on the right track, and a score of 3 means that all respondents fully agree that democratization is on the right track.

The Economic Confidence Index is a composite average which is calculated based on respondent's evaluation on favourable or unfavourable prevailing economic conditions in Kosovo. Specifically, respondents evaluate the following conditions: expectations regarding their family's total income and employment conditions in the next six months, and an assessment of the current business and employment conditions. The values can range from 0 (minimum) to 3 (maximum) where the range of 0-1.5 indicates unfavourable assessment of the economic situation and the range 1.5-3 indicates mostly favourable assessments.