



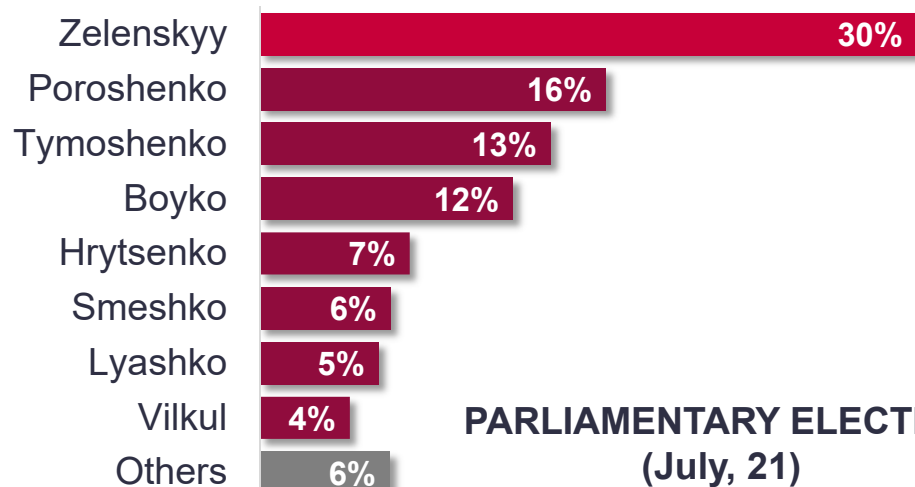
Razumkov
centre

UKRAINE

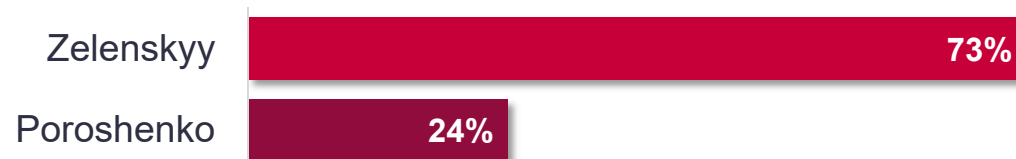
2019

**NEW GOVERNMENT:
PROSPECTS AND
CHALLENGES**

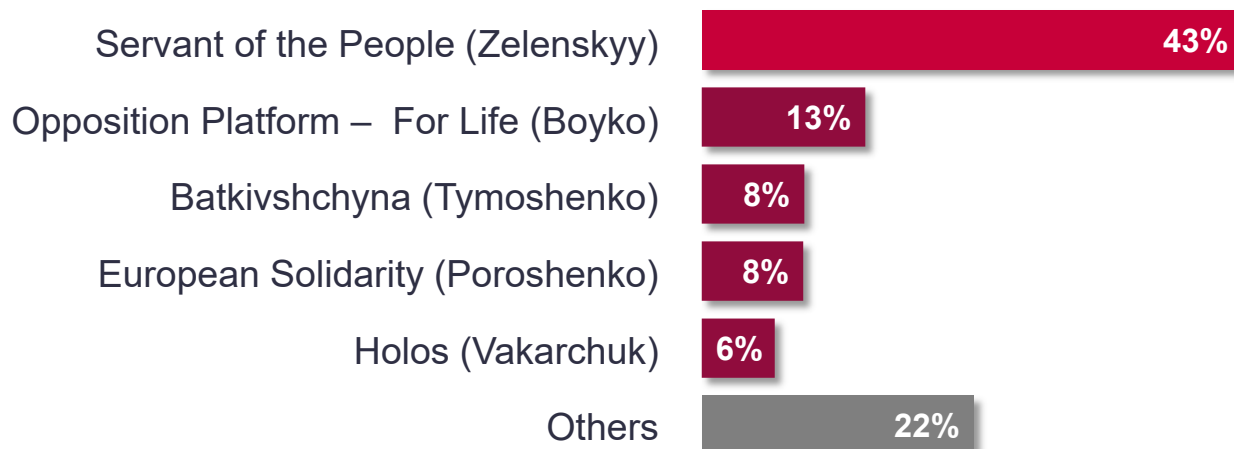
PRESIDENTIAL ELECTION: FIRST ROUND (March, 31)



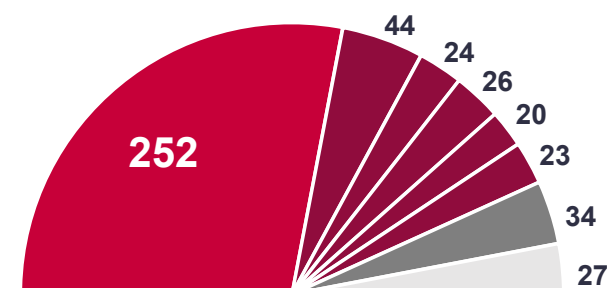
SECOND ROUND (April, 21)



**PARLIAMENTARY ELECTION
(July, 21)**



**THE NEW CONVOCAATION
OF PARLIAMENT (August, 29)**



WHY DID ZELENSKYY AND HIS PARTY WIN

DEMAND

The credibility crisis of old government, people's dissatisfaction in social-economic wellbeing, demand for new faces in politics



OFFER

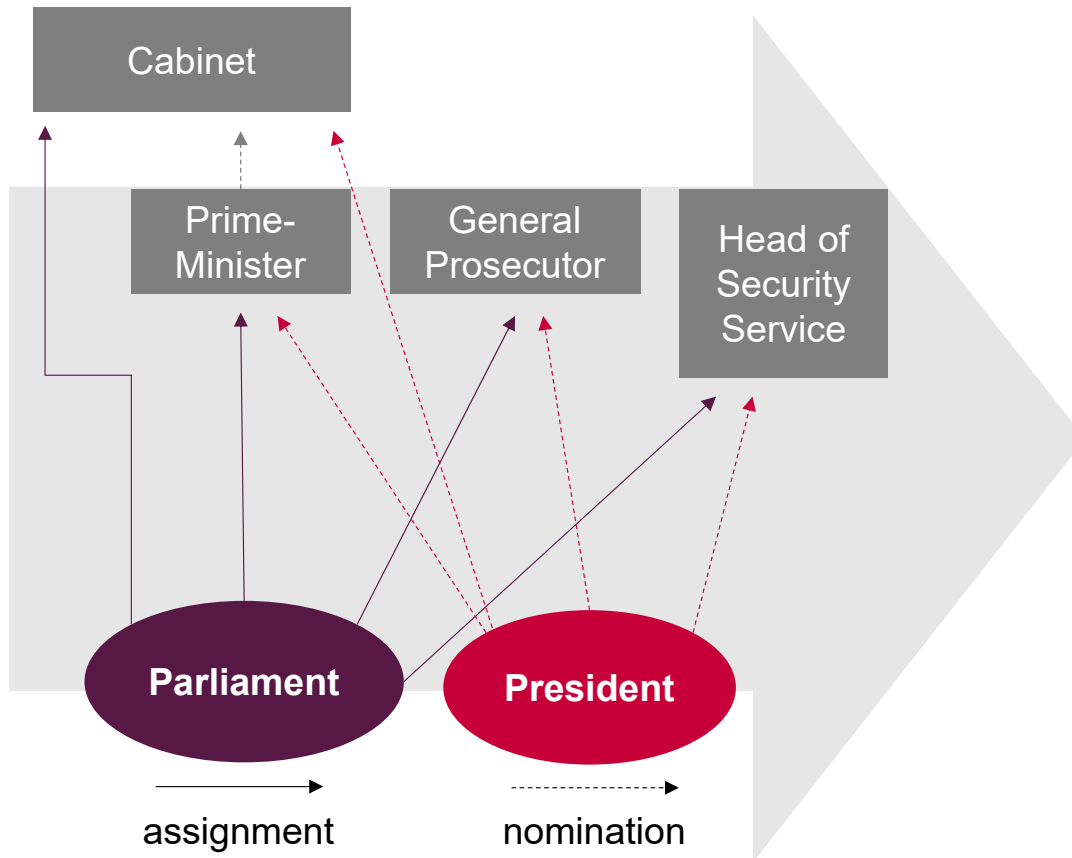
- **Popular comedian actor, who regularly appeared in satirical show and sitcom**
- **Anti-establishment rhetoric, 'catch-all' strategy, populist promises**

Success of 'a president' role in TV series 'Servant of the People', dissolution of Parliament on the inauguration day

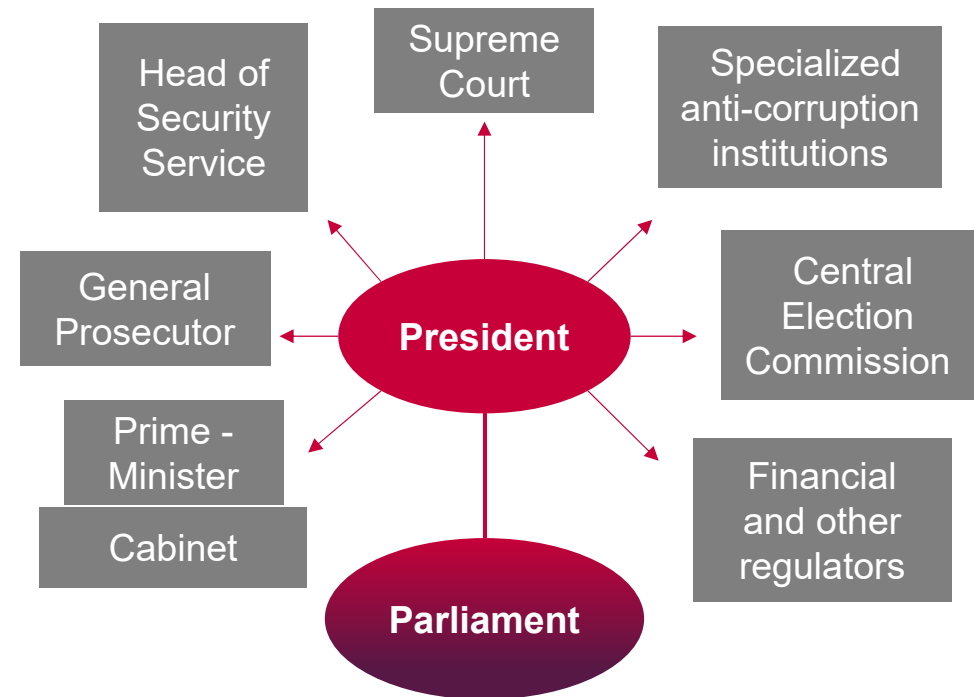
Success of 'Servant of the People' Party brand in the early election

'Servant of the People' candidates won 130 seats in 199 constituencies

Formally, Ukraine is a “Parliamentary-Presidential” republic...



But in case of one(presidential)-party majority,
the real center of decision-making is based
in the Office of President

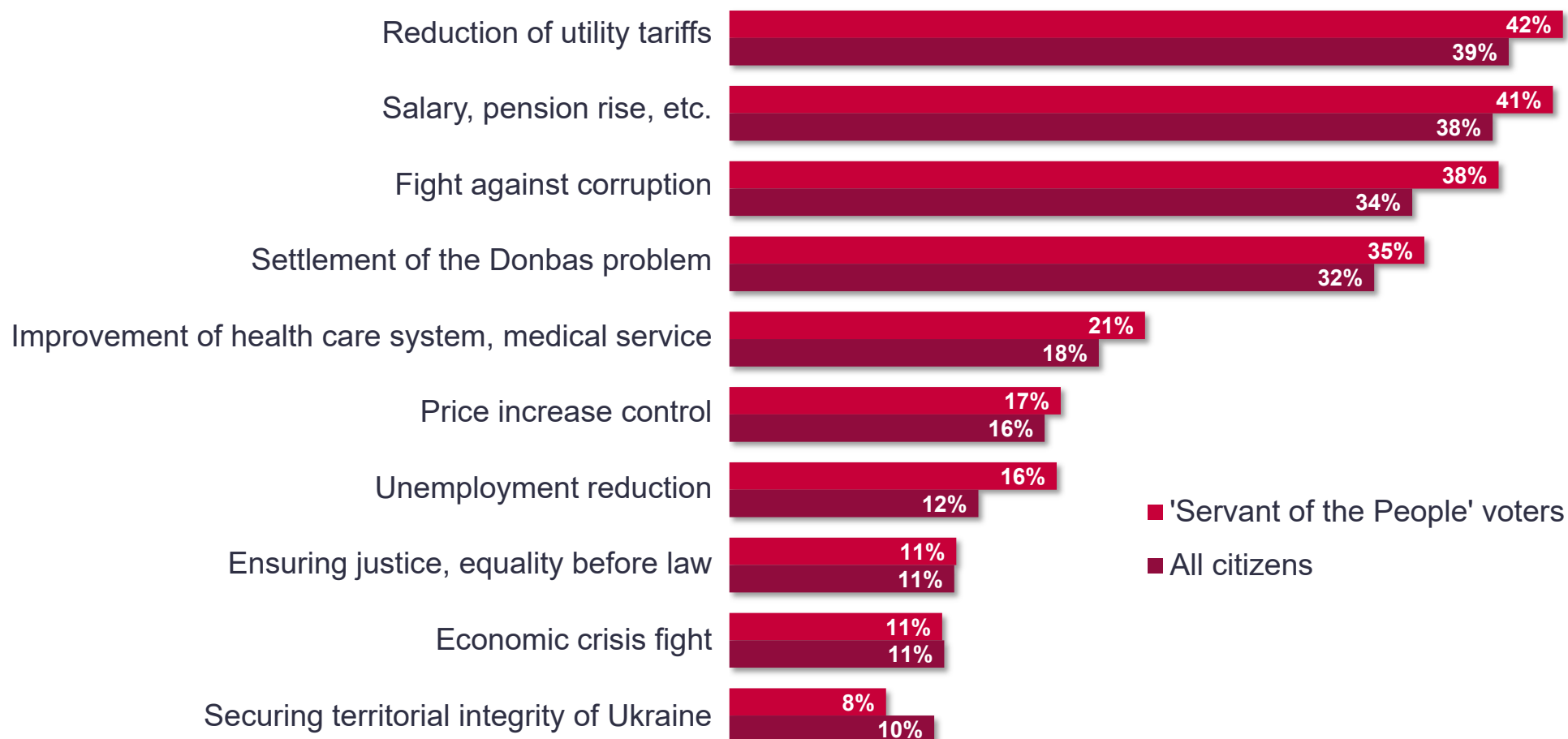


THE MAIN THESIS OF 'SERVANT OF THE PEOPLE' ELECTION PROGRAM

Direct Democracy	Lifting of immunity of MPs, revocation of MPs by voters, public veto on newly adopted laws, influence on government decisions by referendums
Foreign Policy	Implementation of the EU-Ukraine Association Agreement and extending cooperation with the EU and NATO, reloading relations with the neighbors in the West, 'commercial diplomacy' for the promotion of Ukrainian goods
Donbas and Crimea	Regaining the territorial integrity and sovereignty of Ukraine, informational reintegration of residents of the occupied territories of Ukraine
Defense	Defense spending of at least 5% of GDP, modernization of Ukrainian Military according to NATO standards
Security	Depriving the Security Service of Ukraine, the General Prosecutor Office and the National Police of the improper 'business infringement' functions, legal regulation of a gun ownership right
Corruption Fight	Reloading of the Prosecutor Office and Judiciary reform, independence of anti-corruption bodies, confiscation of corrupt officials property, monetary rewards for revealing corruption
Regulations and Taxes	Anti-monopoly measures, reduction of public authorities functions, availability of online administrative procedures, introduction of tax on withdrawn capital, reduction of the single social payment
Social Policy	"Optimization" of utility tariffs, Monetizing of all social benefits, introduction of the second level of state pension reform and compulsory health insurance system
Cultural Policy	Humanitarian policy aimed at uniting Ukrainians, support of the Ukrainian language and culture by fiscal incentives and priority state funding

EXPECTATIONS OF VOTERS

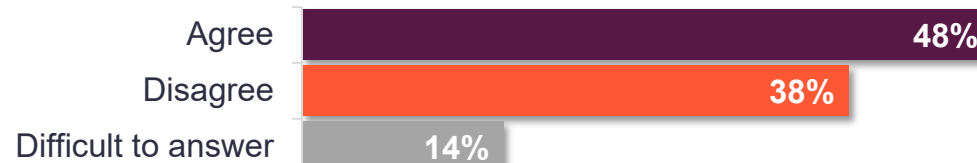
What are the priorities of a new parliament to be elected on July, 21?
NO MORE THAN THREE ANSWERS (July, 2019)



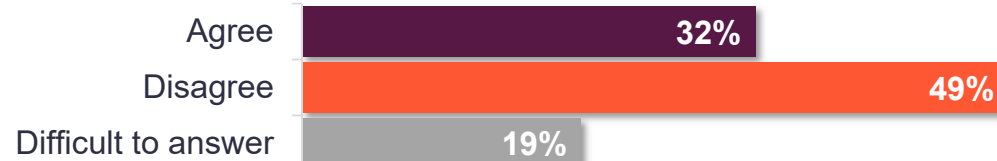
AMBIVALENCY OF 'SERVANT OF THE PEOPLE' VOTERS

Do you agree or disagree with the following statement? (June-July, 2019)
% 'SERVANT OF THE PEOPLE' Party's Voters

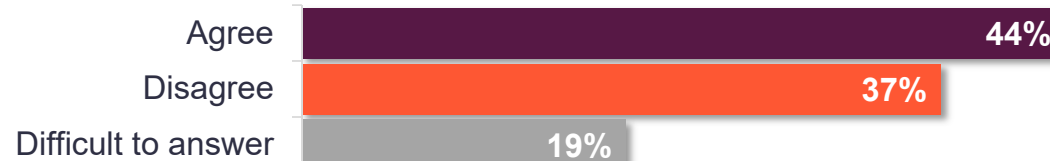
Peaceful settlement of the conflict in Donbas must be achieved at any cost



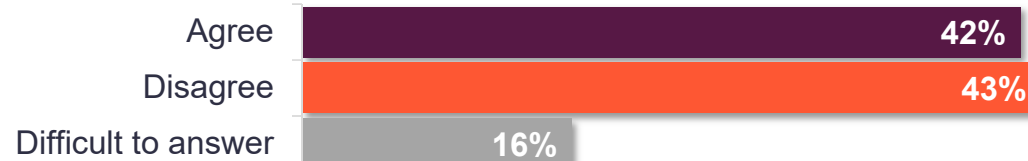
Occupied territories in Donbas should be regained by Ukraine under special conditions
(autonomous status, own police, own prosecution service and courts, language self-identification, amnesty to 'DPR/LPR' insurgents)



The new Parliament must continue reforms that have been carried out in the past 5 years



Citizens of Ukraine should have a right to buy and sell farmland freely



The new Parliament should counterbalance the new President not to let him to abuse his powers



- 1. Amendments to the Constitution for lifting MPs' immunity, adoption of Law on the impeachment of the President of Ukraine.** These initiatives correspond to public expectations and election promises.
- 2. Extending the President's constitutional powers.** Amendments to the Constitution giving the President the right to appoint heads of anti-corruption institutions, to form regulatory bodies and appoint their members have been supported by the Parliament and now they are under consideration of the Constitutional Court.
- 3. Revision of reforms of Judiciary System and the Prosecutor's Office.** Amending of respective laws that make possible to renovate radically the staff of the Prosecutor's Office and composition of bodies, responsible for integrity within Judiciary system, reduction of number of judges in the Supreme Court.
- 4. Increased activity of peaceful settlement in Donbas.** Disengagement of forces, agreeing to 'Steinmeier formula', efforts to unblock the Normandy format. Yet progress is achieved under pressure from Russia at Ukraine's expense.
- 5. Lifting the moratorium on farmland sales.** On November 14, Ukraine's Parliament has passed a bill in its first reading to remove a ban on farmland sale from October, 2020. This measure is not supported by majority of Ukrainian population and has been sharply criticized by the opposition.
- 7. Acceleration of state-owned property privatization.** On October, 2, the Parliament has cancelled legislative restrictions on privatization of a number of objects of transport (including Ukrainian Railways), coal and energy sectors.
- 8. Measures for attracting private capital to state property governing.** The Parliament has adopted Law on Concession (The Law was adopted on October, 3 and came into force on October, 22. It is expected that the concession mechanism will allow the state to attract significant private investment to modernize and enhance efficiency of infrastructural objects (sea and river ports, roads, airports).

1. The lack of systematic approach to policy formulation and its implementation in almost all spheres

- The absence of strategic policy papers, including coherent Presidential and Parliamentary majority programs, The absence of program and ideological clarity in 'Servant of the People' Party

2. Insufficiently motivated review of earlier reforms, failure to recognize possible negative outcomes, increased role of personal factors and weakening of institutions

- Judicial reform, Prosecutor's Office reform, Civil service reform

3. Decision-making that affects the interests of large social and professional groups without communication to them

- Small business, teachers, farmers, mining and other industries

4. Avoidance of mass media

- President's efforts to directly communicate with the public through YouTube video clips, restrictions in public access to socially important information from the President's Office, intention to limit media freedom by setting 'news standards'

5. Staff policy based on personal and political loyalty

- President's business companions and showbiz colleagues with subpar professionalism took up key appointments, including foreign policy and security sector

6. The behind-the-scene approach to developing and making strategic decisions in some spheres

- Lack of clear official position on the conflict in Donbas, contradictory statements of officials etc.

7. De facto refusal to fulfil some of the most publicly requested electoral commitments

- excusing their 'non-specificity' or 'the lack of authority' and the like (e.g. gas tariffs).

PUBLIC OPINION TENDENCIES

Which of the following are the most important issues for the country?*		
And for you personally?		
% of respondents		
	The most important problems of the country	The most important problems of the respondent
Fight against corruption	46.6	24.4
Salary, pension increase, etc.	46.1	63.0
Reduction of utility tariffs	43.9	64.2
Settlement of the Donbas problem	41.9	21.7
Securing of the territorial integrity of Ukraine	28.4	11.2
Price increase control	23.9	29.9
Improvement of health care system, medical service	22.6	35.5
Unemployment reduction	20.3	20.0
Ensuring justice, equality before the law	20.2	15.9
Normalization of relations with Russia	18.4	9.9

What reforms are of the highest priority?*
% of respondents

	July 2015	May 2016	October- November 2017	May 2018	June 2019
Anti-corruption reform	65.2	55.7	59.5	58.0	63.1
Health sector reform	35.9	33.4	44.3	46.5	57.1
Pension reform and reform of social protection	39.9	29.1	35.8	43.6	52.2
Law enforcement system reform (courts, prosecutors, police)	58.0	40.1	33.8	31.8	37.4
Government makeover and lustration	28.8	20.1	22.2	29.3	32.7
Reform of the national security and defence sector	30.9	24.0	21.0	21.5	26.4
Economic recovery of the territories of Donbas, controlled by Ukraine**	–	–	–	–	19.3
Electoral law reform	14.0	9.0	9.3	18.4	17.7
Education reform	11.9	10.1	18.4	16.4	15.1
Tax reform	21.5	16.8	9.7	12.6	13.4
Energy independence programme and energy sector reform***	–	11.3	6.9	11.5	12.5
De-centralisation and local self-governance reform	17.8	10.2	6.8	14.9	11.8

What reforms are of the highest priority?*
% of respondents

Deregulation and entrepreneurship development	14.0	10.3	8.3	9.0	9.7
Land reform	8.1	10.9	6.7	11.2	7.2
Constitutional reform***	–	8.1	4.7	7.6	6.3
Financial sector reform***	–	8.4	4.3	6.6	5.7
Public administration reform***	–	11.7	6.5	8.1	4.8
State property management reform***	–	5.7	3.1	5.6	3.3
State procurement reform***	–	2.0	2.7	4.5	1.8
Media Reform	1.2	1.5	1.5	1.4	1.2
Other	1.2	1.1	2.0	1.0	1.3
Hard to say	4.6	10.9	8.3	4.9	2.6

* Respondents were supposed to give not more than five acceptable answers.

** In the questionnaires of the previous polls, such response answer was not offered.

*** In the questionnaire dated July 2015 such response answer was not offered.

How did the situation change in Ukraine in the following areas compared with early 2019?
% of respondents

	Improved	Worsened	Did not change	Hard to say	Balance *
Freedom of speech	19.9	13.7	58.1	8.3	6.2
Level of democracy	17.4	13.6	61.1	7.9	3.8
National defence capability	18.8	15.9	53.2	12.1	2.9
Ukraine's international image	24.6	21.8	41.8	11.8	2.8
Interethnic relations	18.8	16.5	51.3	13.4	2.3
Situation with the observance of citizens' rights and freedoms	14.1	12.2	60.8	12.9	1.9
Citizens' attitudes towards the government	23.4	21.6	45.0	10.0	1.8
Situation of Ukrainian-speaking population	8.7	7.7	76.7	7.1	1.0
Government's attitudes towards citizens	20.2	20.6	49.2	10.0	-0.4
Situation of ethnic and religious minorities	6.7	7.4	71.8	14.2	-0.7
Situation of Russian-speaking population	6.9	10.8	71.5	10.8	-3.9
Compliance with law by civil servants	12.6	17.0	56.6	13.8	-4.4
Overall situation in the country	15.0	26.2	47.8	11.1	-11.2
Education	6.0	18.8	61.2	13.9	-12.8
Pensions	6.4	20.6	60.2	12.7	-14.2
Economic situation	9.0	23.5	59.3	8.1	-14.5
Crime	7.1	21.6	60.3	11.0	-14.5
Stability	11.9	27.9	50.4	9.8	-16.0
Citizens' confidence in the future	14.4	30.8	44.0	10.9	-16.4
Remuneration of labour	4.9	23.6	60.7	10.8	-18.7
My family's wellbeing	8.3	27.2	61.9	2.6	-18.9
Social security (social benefits, allowances, subsidies, etc.)	6.9	27.8	54.0	11.3	-20.9
Health care	6.5	30.8	55.1	7.6	-24.3
Prices and tariffs	4.6	50.3	39.1	5.9	-45.7

* The difference between the answers "Improved" and "Worsened".

November 2019

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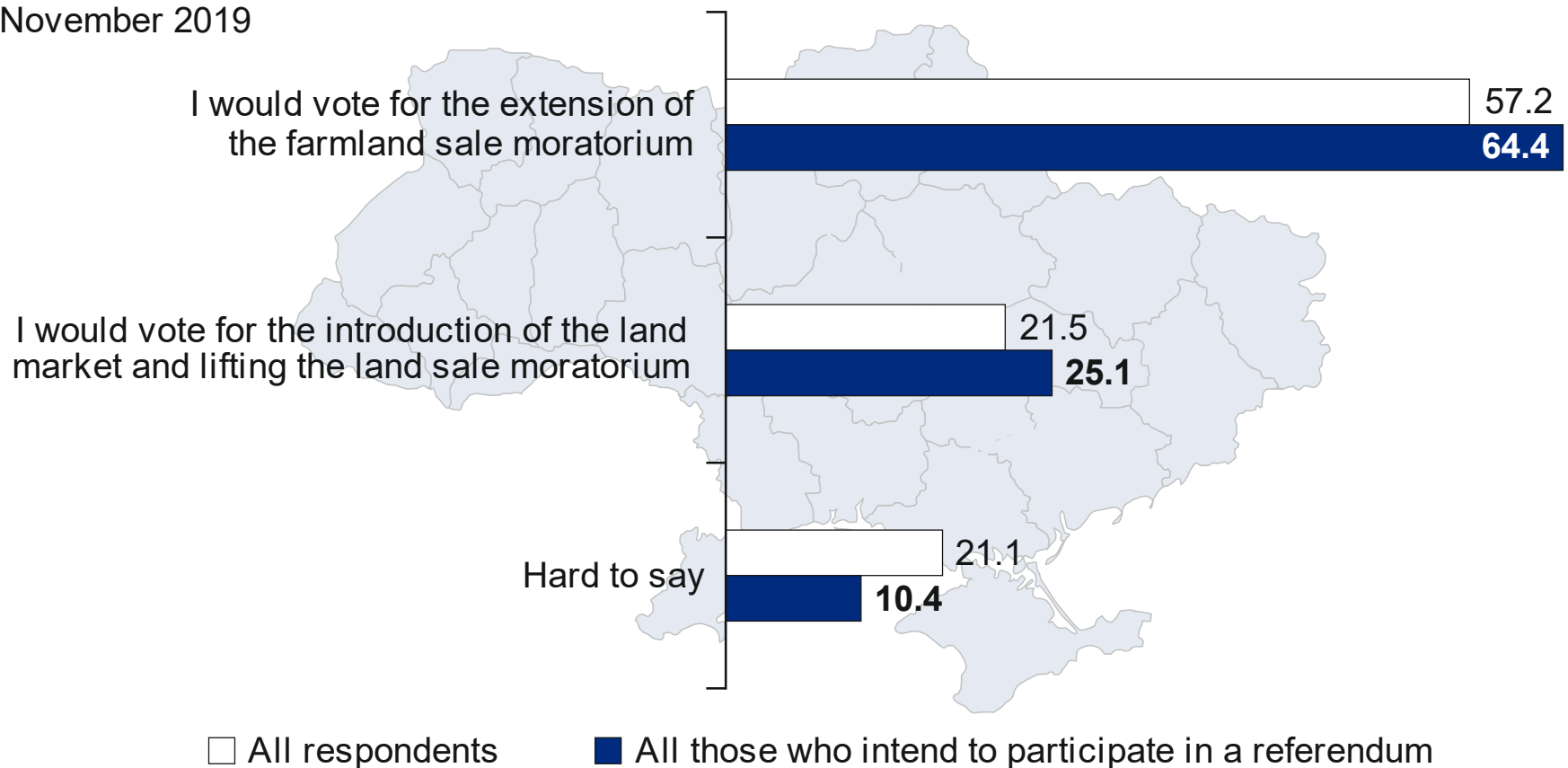
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* The difference between the answers "Improved" and "Worsened".

If a referendum on the introduction of the land market and lifting the farmland sale moratorium occurred next week, how would you vote?

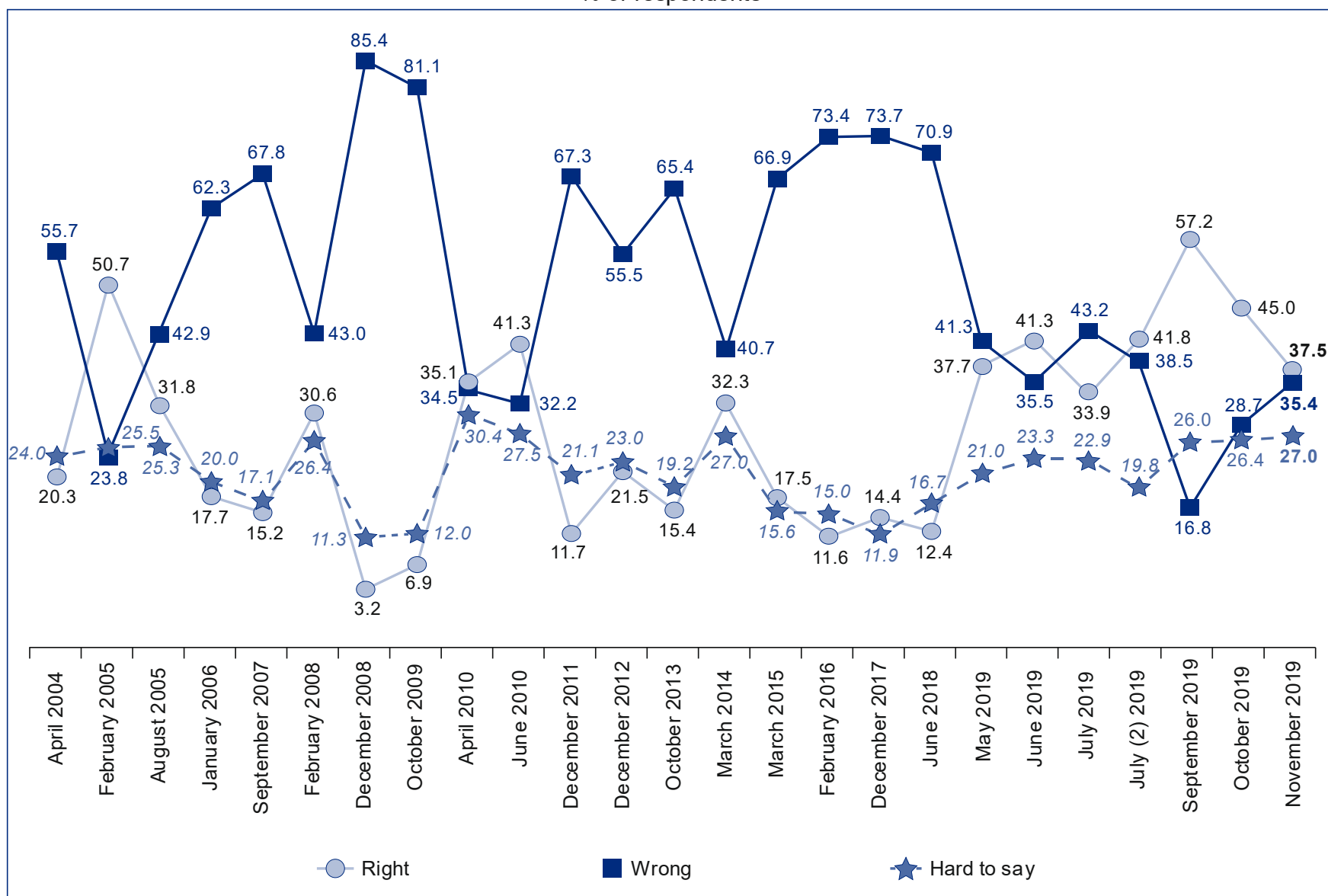
% of respondents

November 2019



Are developments in Ukraine moving in the right or wrong direction?

% of respondents



How much do you trust these social institutions? % of respondents

	Trust*			Distrust**			Hard to say			Balance***		
	September 2019.	October 2019	November 2019.	September 2019.	October 2019	November 2019.	September 2019.	October 2019	November 2019.	September 2019.	October 2019	November 2019.
President of Ukraine	79.4	69.9	68.2	13.5	21.9	24.8	7.2	8.1	7.0	65.9	48.0	43.4
Verkhovna Rada of Ukraine	56.7	47.2	43.7	25.1	37.9	44.7	18.2	15.0	11.5	31.6	9.3	-1.0
Government of Ukraine	56.9	45.2	44.2	21.8	38.0	43.8	21.3	16.7	11.9	35.1	7.2	0.4
The state apparatus (public officials)	26.0	20.8	19.8	55.4	62.7	68.5	18.6	16.5	11.6	-29.4	-41.9	-48,7
Armed Forces of Ukraine	73.6	74.7	70.3	20.1	17.7	23.2	6.3	7.7	6.6	53.5	57.0	47,1
Police	51.0	46.1	44.2	38.3	38.8	43.1	10.7	15.1	12.6	12.7	7.3	1.1
Security Service of Ukraine	45.7	42.6	42,2	38.6	37.9	40,7	15.7	19,4	17.0	7.1	4.7	1.5
The patrol police	45.0	42.6	39.7	42.6	42.1	46.6	12.3	15.3	13.6	2.4	0.5	-6.9
Courts (the judicial system)	15.1	14.3	14.2	71.7	70.1	73.2	13.2	15.4	12.5	-56.6	-55.8	-59.0
Political parties	21.6	16.3	17.8	63.4	65.9	66.4	15.1	17.7	15.7	-41.8	-49.6	-48.6
NGOs	51.7	49.2	50.6	33.4	32.3	33.3	14.9	18.5	16.1	18.3	17.0	17.3
Church	63.1	60.6	64.6	26.6	27.5	25.6	10.4	12.0	9.8	36.5	33.1	39.0
Ukrainian mass media	56.2	55.6	54.2	36.8	35.5	35.9	7.0	8.9	9.8	19.4	20.1	18.3
Western mass media	42.0	38.2	37.4	36.8	27.4	37,2	21.2	23.5	25.5	5.2	0.8	0.2
Russian mass media	9.9	11.0	7.4	79.9	76.3	79.9	10.2	12.6	12.8	-70.0	-65.3	-72.5

* The aggregate of answers "Trust" and "Mostly trust".

** The aggregate of answers " Distrust" and "Mostly distrust".

*** The difference between the aggregate of answers "Trust" and "Mostly trust" and the aggregate of answers " Mostly distrust" and "Distrust".

Is Ukraine able to overcome the existing problems and difficulties? % of respondents

