

DEMOCRACY AND HUMAN RIGHTS

REFORM IN UKRAINE: CHANGE FOR THE BETTER OR AN IMITATION OF PROGRESS?

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There is demand for systemic reform in Ukrainian society. The majority of citizens believe that these changes must be initiated by the country's leadership, primarily by the president.



Healthcare reform, police reform and decentralisation are the most widely known reforms launched since the Revolution of Dignity. Some 82.9%, 72.2% and 61.8% of the population have heard about them. However, only 15.3%, 20.6% and 32.6%, respectively have had a positive experience with the results of these reforms



Most citizens consider compromise for the sake of peace and the settlement of the armed conflict in eastern Ukraine unacceptable. Citizens are of the opinion that the most undesirable developments for Ukraine would include the recognition of Crimea as Russian territory, the transfer of control of Ukraine's gas transportation to Russia and a full amnesty for militants in the so-called Donetsk and Luhansk People's Republics (DPR and LPR).

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1

INTRODUCTION

In Ukraine, the word »reform« has become a buzzword, a term that is fashionable to use but often devoid of specific meaning. This development is a result of repeated announcements of reforms made by government officials since Ukrainian independence (and even in its final years as part of the Soviet Union), which were ultimately never implemented or did not achieve their goals.

At the same time, Ukraine requires numerous urgent changes, on which its very existence as a state depends. These changes must go beyond declarations and bring about genuine transformation.

We recall that the new authorities that came to power in 2014 after the Revolution of Dignity announced comprehensive reforms, which reflected the expectations of the public and were supported by the West.

However, 2019 saw power change hands following the presidential and parliamentary elections. As a result, Ukraine now has a new president, a new government and a new parliament. Reform continues to be a priority issue for the new team.

In this situation, it is important to gauge how the public perceives the reforms that were launched or announced in the past five years. For those who are responsible for developing and implementing systemic changes in the country, an understanding of what Ukrainians think about reform, their reasons and the consequences of this is crucial. This is an essential component of building dialogue with the public on the essence of and need for urgent change.

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METHODOLOGY

The study »Reform in Ukraine: Change for the Better or an Imitation of Progress?« was carried out by Gorshenin Institute and the Representation of the Friedrich Ebert Foundation in Ukraine in September-December 2019.

The object of the study: Ukrainians aged over 18, taking into account their main social and demographic characteristics (gender, age, region of residence).

The subject of the study: Ukrainians' attitudes regarding the implementation of reform.

The goal of the study: to research Ukrainians' attitudes towards reform in the country.

To achieve the stated goal, the following objectives were identified:

- assess the opinions of Ukrainians regarding the situation in the country;
- establish what Ukrainian society understands by the concept of »reform«;
- establish how citizens rate the mechanism for the implementation of reform, the driving forces of change in the country, and current obstacles to reform;
- establish whether Ukrainians are prepared to endure financial hardship in exchange for successful reform;
- identify the most widely known reforms since Ukraine's independence;
- ascertain what citizens know about the reforms that were initiated during Petro Poroshenko's presidency, and how they feel about them;
- ascertain whether Ukrainians know which reforms President Volodymyr Zelenskyy and his team intend to carry out;
- establish whether Ukrainians have faith in the success of the reforms planned by President Volodymyr Zelenskyy's new team;
- analyse how Ukrainians rate key sector reforms such as healthcare reform, decentralisation, labour law reform, pension and land reforms, etc.;
- ascertain what changes Ukrainians would accept in order to achieve peace in Donbas.

of Ukraine: centre (Kyiv), west (Lviv), east (Dnipro), south (Odesa) and north (Chernihiv). Eight respondents took part in each group (six participants from a regional centre and two from small towns in the same region). Discussion participants were Ukrainian citizens aged 18 to 65. Each group comprised an equal number of men and women.

The results of the focus group research were used to develop the questionnaire for our all-Ukrainian survey. The opinions expressed by participants in the discussions were also used to help us better understand the data obtained during face-to-face interviews.

Face-to-face interviews were conducted by respondent place of residence in November-December once the results of the focus group had been analysed. A total of 2,000 respondents aged 18 and over were interviewed in all regions of Ukraine (excluding the occupied territories of Donetsk and Luhansk, the Autonomous Republic of Crimea and the city of Sevastopol). We used quotas for region of residence, gender and age of respondent. Coverage error does not exceed +/- 2.2%.

Methods of information collection. In September 2019, five focus group discussions were held in the following regions

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KEY FINDINGS

3.1. UKRAINIAN PUBLIC OPINION REGARDING THE SITUATION IN THE COUNTRY

The study has shown that Ukrainians are quite critical of the reforms introduced by the authorities in the years since Ukraine declared independence. Some participants in focus group discussions suggested that the systemic changes introduced over the 28 years since independence could even be referred to as an »imitation of reform« which politicians used to cream off budget funds.

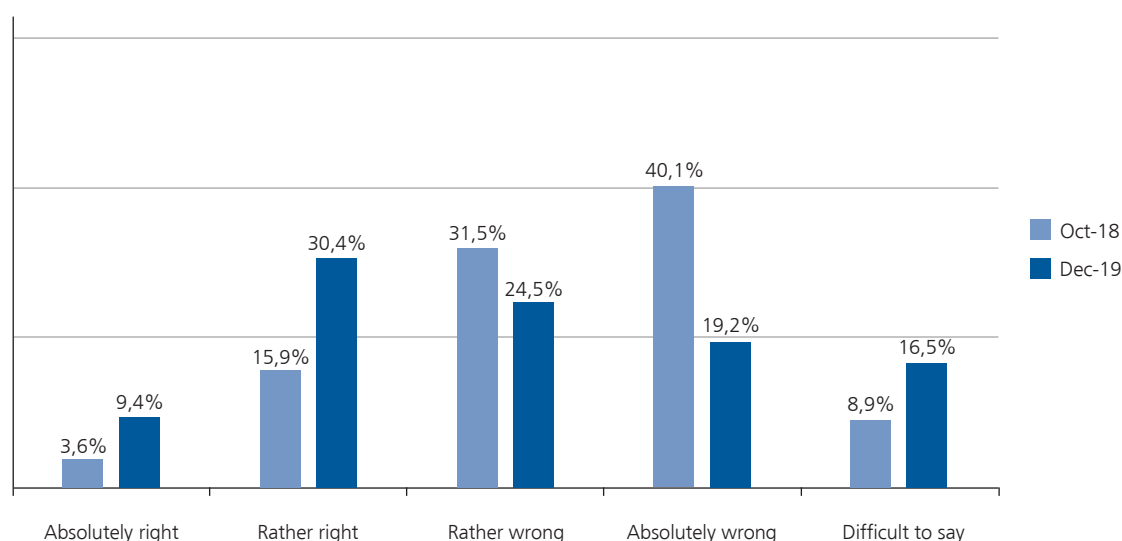
At the same time, this quantitative study found that almost half of the Ukrainians surveyed (43.7%) believe that things are moving in the wrong direction in Ukraine (19.2%: »absolutely wrong«, 24.5%: »rather wrong«). A somewhat lower number of respondents (39.8%) said that things were moving in the right direction (9.4%: »absolutely right«, 30.4%: »rather right«).

Residents of western Ukraine are most critical: 42.7% of them believe that things are moving in the wrong direction, while 33.4% think the opposite. The most optimistic respondents were those living in the centre of Ukraine (47.1% of respondents said things were moving in the right direction and 41.3% felt they were moving in the wrong direction) and the south (45.7% gave a positive response and 39.3% responded in the negative). Further, the answers to this question differed depending on the respondent's age: young people were more likely to say that things were going in the right direction (51.9%), whereas older respondents thought otherwise (53.5%).

It is worth mentioning that, according to the nationwide study carried out by Gorshenin Institute in October 2018 (n=2,000 respondents), in other words six months before the Ukrainian presidential election, the overwhelming majority of citizens (71.6%) thought that things were moving in the wrong direction, 31.5% said that developments were »rather wrong«, and only one in five respondents (19.5%) said that things were moving in the right direction (3.6%: »absolutely right«, 15.9%: »rather right«).

Graph 1

Responses to the question »Do you think things in Ukraine are generally moving in the right or wrong direction?«



The lower number of people with a critical opinion of the situation in the country has to do with a large credit of trust in the new authorities represented by President Volodymyr Zelenskyy. This is confirmed by the fact that when asked the question »Are you satisfied with the work of The President of Ukraine Volodymyr Zelenskyy?«, almost half of all respondents (47%) answered in the affirmative (11.3%: »absolutely yes«; 35.7%: »rather yes«). Just over one third of respondents (35.5%) expressed dissatisfaction (16.6%: »absolutely not«, 18.9%: »rather not«), and 17.5% found it difficult to answer the question.

The level of satisfaction with the work of President Volodymyr Zelenskyy correlates with answers to the question about the direction of developments in Ukraine. However, it is worth noting that there is a significant difference between respondents' assessments of the president and their opinion of other government agencies.

In particular, nearly half of respondents (47.2%) are not satisfied with the work of the back-then Oleksiy Honcharuk's Cabinet of Ministers (23.6%: »absolutely not«, 23.6%: »rather not«). Almost a quarter of respondents (26.9%) have a positive opinion of the government (4.4%: »absolutely yes«, 22.5%: »rather yes«), and almost the same number of respondents (25.9%) found it difficult to answer this question.

At the same time, one in two Ukrainians (54.4%) is dissatisfied with the work of the Verkhovna Rada of Ukraine (parliament of Ukraine) (28.9%: »absolutely not«, 25.5%: »rather not«). One in four respondents (25.4%) rate the work of MPs positively (4.1%: »absolutely yes«, 21.3%: »rather yes«), while one in five respondents (20.2%) could not make up their mind on the matter.

3.2. WHAT UKRAINIANS UNDERSTAND BY THE NOTION OF »REFORM«

During focus group discussions, respondents tended to associate the notion of »reform« with positive changes in the country, more efficient operation of its institutions, and better living standards for its citizens. Study participants noted that the term »reform« prompted associations with words such as »change«, »improvement«, »movement«, »innovation«, »transformation«, »evolution« and so on.

” Change, innovation. Higher salaries.
39-year-old woman, Lviv.

” Some changes for the better. Global changes.
20-year-old man, Kyiv.

” Improved material well-being of society.
57-year-old man, Chernihiv.

” Reform is about making the state more effective. And it is not a given that changes will immediately improve people's lives. Sometimes reforms can be very painful. However, after a while the state machinery starts to work better.
41-year-old man, Kyiv.

That said, the study has shown that one in two respondents (48.9%) have negative associations when they hear about the implementation of reforms in Ukraine. Over a third of respondents (37.1%) stated that they had positive associations when reforms in Ukraine were mentioned.

These results could be due to the fact that every political actor that has come to power in Ukraine has publicly announced the need to introduce reforms but there have still been no significant changes, or reforms have only been partially implemented.

3.3. CONDITIONS FOR IMPLEMENTING EFFECTIVE REFORMS AND THE DRIVING FORCES OF CHANGE

Ukrainian citizens believe that above all successful reforms require a strong leader (41.4%), an appropriate legislative framework (34.2%), the political will of the country's leadership (33%) and coordinated work of government offices (30.9%). Far less frequently, respondents referred to the importance of conditions like an active civil society (12.4%), public demand in general (11.9%), and support for reforms from big business and oligarchs (11.5%).

Another similar question asked who, in the respondent's opinion, must be the driving force of reform. Most respondents (61.3%) said that the President of Ukraine must be the driver of reforms. This option was particularly popular with residents of eastern Ukraine (73%).

Table 1
Responses to the question »Are you satisfied with work of...?«

	Absolutely yes	Rather yes	Rather not	Absolutely not	Difficult to say
...President of Ukraine Volodymyr Zelenskyy	11,3%	35,7%	18,9%	16,6%	17,5%
...Oleksiy Honcharuk's Cabinet of Ministers	4,4%	22,5%	23,6%	23,6%	25,9%
...Verkhovna Rada of Ukraine	4,1%	21,3%	25,5%	28,9%	20,2%

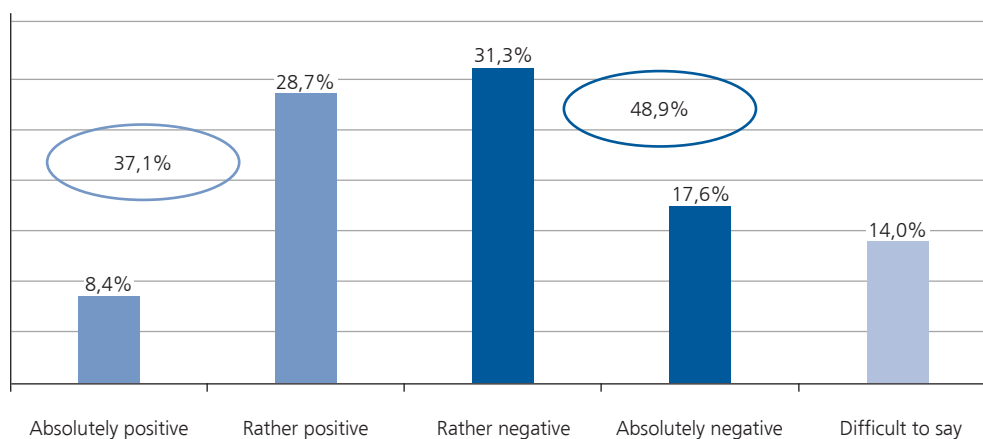
Figure 1

Associations with the word »reform« (based on focus group participants' responses)



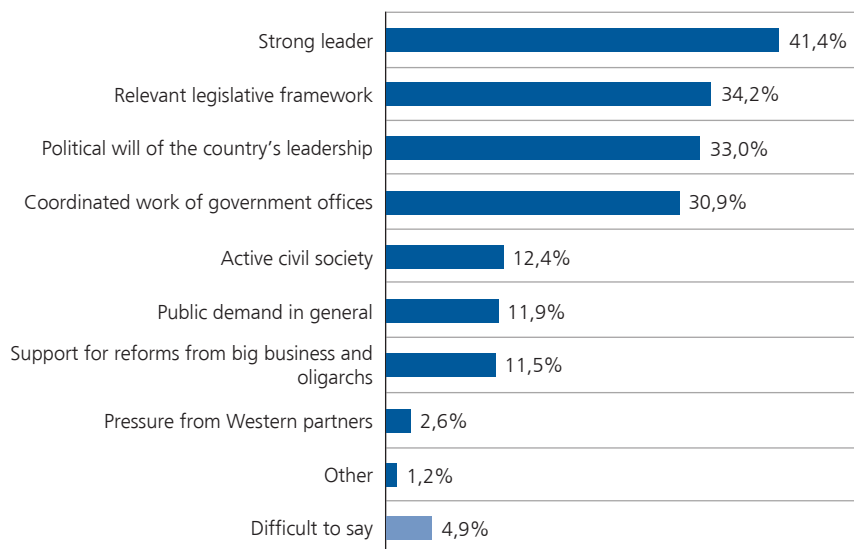
Graph 2

Responses to the question »What associations do you have when you hear about reforms in Ukraine: positive or negative?«



Graph 3

Responses to the question »In your opinion, what is the most important requirement for the successful implementation of reforms?« (respondents could choose up to two options)



Almost every second respondent (47.9%) believes that the government must be the driving force of reforms while nearly one third of respondents (31.6%) named the Verkhovna Rada.

Only one in five Ukrainians (19%) suggested that society in general must act as the engine for reform while one in ten respondents (10.4%) wanted this role to be carried out by the local authorities. Even fewer people thought that reforms must be taken forward by NGOs, volunteers and activists (2.6%), as well as Western partners or international organisations (2.2%).

The last two questions show that even 28 years after the collapse of the Soviet Union, the ideas of paternalism and leader-oriented centrism are still popular in Ukrainian society. In particular, as far as the implementation of reforms is concerned, a large share of Ukrainians relies on a strong leader, usually the president, who will come to

power and be able to radically change the situation in the country.

At the same time, it is quite telling that most respondents attach no significance to the public, in particular civil society, as a factor in the introduction and implementation of reforms. These results mean that Ukraine is faced with the very important task of improving the population’s political awareness.

It is also worth mentioning that only 2.2% of respondents believe that Western partners and international organisations should be the driving force of reform. That said, most Ukrainians (65.8%) agree that Western institutions influence the progress of reforms in Ukraine. Some 33.8% consider this influence to be positive and 32% said it was negative. Only 16% of respondents did not think that international organisations and Western partners had any impact on the progress of reforms in Ukraine, while one in five Ukrainians (18.2%) found it difficult to answer this question.

Graph 4
Responses to the question »In your opinion, who has to be the driving force of reform?« (respondents could choose up to two options)

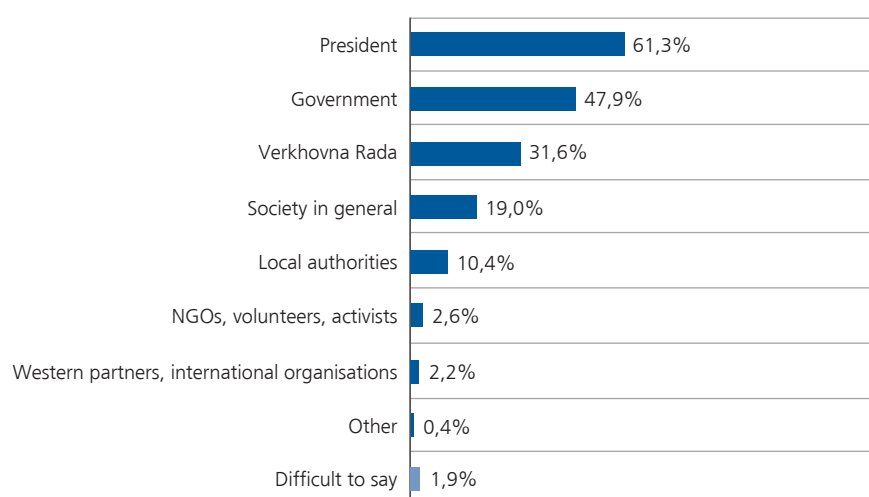
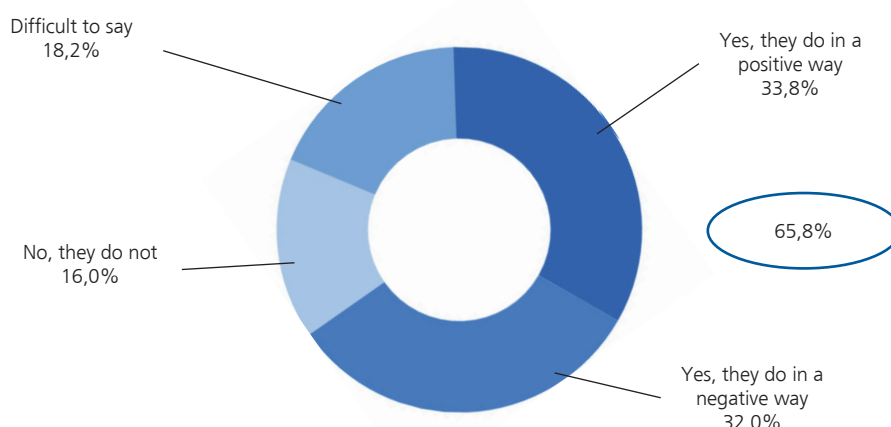


Table 2
Breakdown of responses to the question »In your opinion, who has to be the driving force of reform?« by region of residence

	REGION				
	North	Centre	East	West	South
President	58,5%	59,8%	73,0%	55,4%	55,6%
Government	44,3%	46,0%	44,0%	53,0%	53,0%
Verkhovna Rada	35,5%	34,4%	30,6%	27,3%	32,9%
Local authorities	13,7%	5,1%	6,1%	17,6%	3,4%
Western partners, international organisations	2,8%	1,4%	0,6%	3,7%	1,7%
NGOs, volunteers, activists	2,4%	3,6%	2,1%	2,8%	2,1%
Society in general	21,3%	23,2%	18,4%	17,2%	15,0%
Other	0,0%	1,1%	0,6%	0,2%	0,0%
Difficult to say	1,9%	1,1%	1,3%	2,6%	2,6%

Graph 5
Responses to the question «In your opinion, do Western partners and international organisations influence the progress of reforms in Ukraine?»



The idea that Western partners and international organisations have a positive impact on the progress of reforms in Ukraine is mostly shared by those living in the west (49.5%) and centre (42.4%) of the country. Citizens living in the south (54.3%) and east (40.5%) tended to describe this impact as negative. Ukrainians aged 18 to 29 (43.5%) often described this influence as positive, while those over the age of 60 (35.4%) consider it to be negative.

Participants in focus group discussions gave similar answers when asked who should initiate reforms. Mostly, they mentioned the central government authorities first (primarily the president) as the main driving force of reform.

” The president and his team. With his Verkhovna Rada, the way it is now, and with his government. There should be a team.
61-year-old man, Dnipro.

” The president must set the goals and others must systematically work towards it. One goal followed by the second, third, fourth and so on.
42-year-old woman, Dnipro.

” All reforms, in principle, are carried out by means of laws. Our legislature is the Verkhovna Rada.
46-year-old man, Odesa.

” The government, in principle, the Cabinet of Ministers.
47-year-old man, Lviv.

In the course of discussions, respondents quite often concluded that society and NGOs, as representatives of the population, should also have an impact on reforms in the country and that when introducing reforms the authorities should take citizens' needs into account.

” People must solve community issues and offer their ideas to the authorities. Now there are websites where you can vote, where people can promote their proposals. And they should be promoted by people who understand what, where and how it should be done. Well, I do not know whether this has to be a lawyer, but at least a person who understands where he should go and how to exert pressure.

27-year-old man, Dnipro.

” It seems to me that the ideas for reform stem from what the public wants. Later they have to be implemented by the government, the president, etc.
18-year-old woman, Lviv.

” As a representative of an NGO, I understand perfectly well what «civil society» is. This is a huge sector. As a rule, it initiates reforms. This is not just one single person but a huge movement. It includes NGOs, charity foundations, social entrepreneurship. We are closer to people and we know their real needs. We are more flexible than government institutions, which are very conservative... There should be joint efforts.
45-year-old woman, Kyiv.

Overall, having analysed the responses given by focus group participants, we can construct the following subjective model of a mechanism of reform in the country (see Figure 2).

In the course of focus group discussions, respondents summarised the key obstacles to the implementation of effective reforms. In particular, they mentioned the following factors of relevance:

- corruption;
- officials and politicians who do not want to work for the benefit of the state;
- the mentality of the population, unwillingness to change anything, striving for stability;

Table 3

Breakdown of responses to the question »In your opinion, do Western partners and international organisations influence the progress of reforms in Ukraine?« by region of residence and age

		Yes, they influence it positively	Yes, they influence it negatively	No, they do not influence it	Difficult to say
AGE	18-29	43,5%	22,9%	14,5%	19,1%
	30-44	33,1%	32,1%	17,6%	17,2%
	45-59	31,5%	33,6%	16,2%	18,7%
	60 and over	31,0%	35,4%	15,2%	18,4%
REGION	North	33,6%	32,2%	12,1%	22,0%
	Centre	42,4%	23,9%	14,9%	18,8%
	East	21,0%	40,5%	19,3%	19,1%
	West	49,5%	18,0%	17,1%	15,4%
	South	15,8%	54,3%	14,1%	15,8%

Figure 2

Mechanism of reform (based on responses from focus group participants)



- repeated change of power in the country, new authorities’ aversion to the idea of succession of reforms (participants in focus groups believe that state leaders lacked the time required to complete the reforms initiated);
- incompetence of the executive, poor documentation, imperfect mechanisms of reform;
- lack of control over the implementation of reforms and of the system for holding responsible parties accountable for failed policies;
- insufficient funding;
- external influence, the influence of other countries on domestic policy.

” Because those who stood at the origins of these reforms deliberately did not carry out reforms in a way that would benefit their country and their people.

68-year-old woman, Chernihiv.

” What we have is only an imitation of reform. At first, reforms seem to be going well, right? Then they come to nothing. Then the government changes again, the Verkhovna Rada changes, and we start again. We start with the reforms all over again.

54-year-old man, Kyiv.

” I think that corruption was an obstacle because the interests of big capital were pursued.
55-year-old woman, Dnipro.

” People lack patience, they are not willing to respect each other and, for some reason, they always expect others to do something for them. They are not willing, I don’t know, to keep their own morals their own home in order.
30-year-old woman, Dnipro.

It is important to mention that when discussing corruption, respondents often held politicians and law enforcement agencies responsible for resolving this problem. At the same time, they did not display any willingness to resist this social phenomenon, noting that they deemed it acceptable to be able to »solve problems« with the help of money and gifts, or use »connections«.

3.4. REFORMS AND THE POPULATION'S STANDARD OF LIVING

Asked whether they considered it realistic to simultaneously implement reforms and improve social standards, half of Ukrainians (51.5%) answered in the affirmative (17.4%: »strongly agree«, 34.1%: »rather agree«). Almost a third of respondents (34.9%) do not think this can be done (13.1%: »strongly disagree«, 21.8%: »rather disagree«).

Young people aged 18 to 29 tend to think that it is possible to improve social standards while implementing reforms (19.7%: »strongly agree«, 37.1%: »rather agree«), while older people, in other words respondents over the age of 60, tend not to believe this is feasible (15.2%: »strongly disagree«, 23.7%: »rather disagree«).

At the same time, most Ukrainians (61.2 %) are not prepared to endure material hardship for the success of reforms (30.7%: »strongly disagree«, 30.5%: »rather disagree«). Almost one third of Ukrainians (30.4%) said that they were willing to endure temporary material hardship for the success of reforms (5.7%: »strongly agree«, 24.7%: »rather agree«).

Ukrainians over the age of 60 are not willing to endure material hardship (35.4%: »strongly disagree«, 31%: »rather

disagree«). Those aged 45 to 59 share this opinion (31.1%: »strongly disagree«, 33.3%: »rather disagree«), whereas 18-29-year-olds are prepared to tolerate such problems (8.1%: »strongly agree«, 33.6%: »rather agree«).

The answers to the last two questions show that Ukrainians favour populist solutions. This attitude to state policy matches the rhetoric of the incumbent authorities according to which there is a need for quick reforms and credible results.

We acquire a better understanding of Ukrainians' attitudes towards reforms if we analyse the focus group discussions. Overall, discussion participants were reluctant to leave their comfort zones out of fear of change and the unknown. In their view it was unacceptable to allow a temporary deterioration of people's standard of living in exchange for the success of reforms. The most frequently given arguments were:

- the lack of positive reform cases in the past;
- low standards of living of the population;
- social injustice in Ukrainian society (the absence of a middle class, a wide gap between the material well-being of most citizens and representatives of big business and the authorities);
- high level of corruption in the country (especially among representatives of the authorities on all levels).

Graph 6

Responses to the question »Do you think it is realistic to carry out reforms and improve social standards at the same time?«

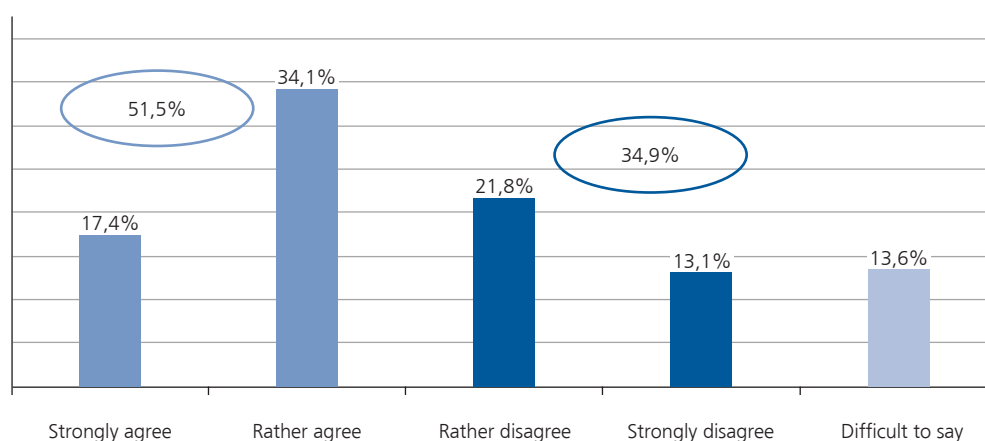


Table 4

Breakdown of responses to the question »Do you think it is realistic to carry out reforms and improve social standards at the same time?« by age

	AGE			
	18-29	30-44	45-59	60 and over
Strongly agree	19,7%	17,4%	16,7%	16,6%
Rather agree	37,1%	35,6%	34,7%	30,6%
Rather disagree	20,0%	20,7%	21,7%	23,7%
Strongly disagree	7,0%	13,9%	13,7%	15,2%
Difficult to say	16,2%	12,5%	13,2%	13,9%

Graph 7
Responses to the question «Are you willing to endure temporary material hardship (higher tariffs, prices, etc.) for the success of reforms?»

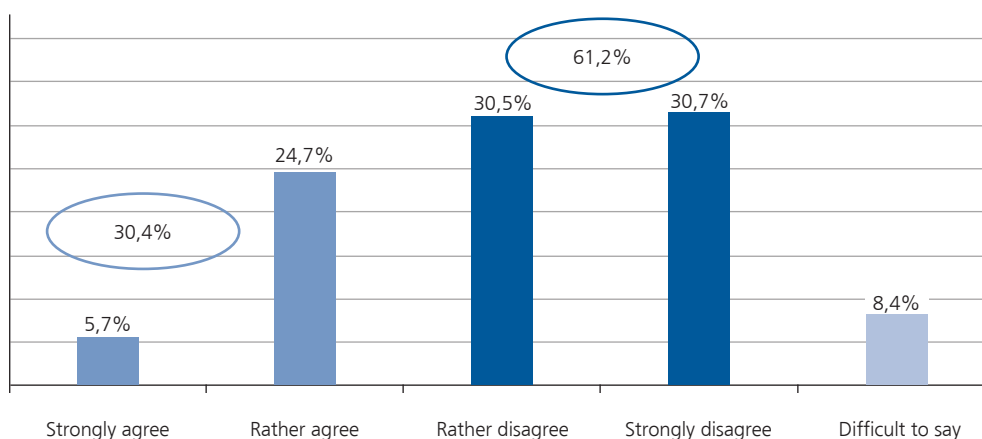


Table 5
Breakdown of responses to the question «Are you willing to endure temporary material hardship (higher tariffs, prices, etc.) for the success of reforms?» by age

	AGE			
	18-29	30-44	45-59	60 and over
Strongly agree	8,1%	6,1%	5,2%	4,3%
Rather agree	33,6%	24,7%	23,0%	21,0%
Rather disagree	28,1%	28,4%	33,3%	31,0%
Strongly disagree	20,0%	31,9%	31,1%	35,4%
Difficult to say	10,1%	8,8%	7,5%	8,3%

“ Reforms have been imitated here for 20 years. They simply steal money under the guise of this imitation of reform. People see it all, and they don't really like it.
41-year-old man, Kiev.

“ You know, if you look today at all those reforms we have had, every reform resulted in our standard of living deteriorating further. They are effectively letting us down all the time... So, as for me, for example, I support reforms that do not result in our well-being declining even more..
51-year-old woman, Lviv.

“ They have pushed people over the edge anyway.
46-year-old man, Odesa.

“ When, in society, a certain number of people suffer while others line their pockets, making hay, this is unfair. If it applies to everyone, it should include everyone: doctors, teachers...
39-year-old woman, Lviv.

Similar opinions were heard from focus group participants when explaining why they were not prepared to endure material hardship. They listed reasons like:

- desire to «have a decent life» today;

- fake reforms in the past, the absence of positive changes over the years since Ukraine's independence;
- high level of corruption which rules out positive reform;
- social injustice: everyone, except the representatives of big business and the authorities, have to «tough it out».

“ I would not want things to get worse... I want to live now, not then.
42-year-old woman, Dnipro.

“ See, they have promised us so much lately, various reforms, right? What have they done? Nothing. It has only got worse. Before you ask a person to do something, you should at least give him a sweet to make it worthwhile. See? They have pushed people to the edge, everyone is on their own now... So show me at least some light at the end of the tunnel, tell me that it will be fine in the end, then you will have me on board.
61-year-old man, Dnipro.

“ Girls here said that the Poles had struggled for ten years, so to speak. I have been struggling since 1991... I don't see any constructive changes.
51-year-old woman, Lviv.

Some focus group participants considered it possible that the standards of living of their family and society as a whole might temporarily deteriorate. In their words, a decline in the standard of living of the population is an integral component of the initial stages of reform, and society has no choice in this regard. For example, respondents noted that in a similar fashion, some European countries that had to »tighten their belts« for a while managed to make a leap forward in terms of their social and economic development.

” I think that it is acceptable... I mean some transition period, quite a difficult one. I think that we can wait for a while for changes for the better to take place.

35-year-old woman, Kyiv.

” Historically, all developed countries went through this... People were literally starving. Like in Great Britain 200 years ago or in Germany.

20-year-old man, Kyiv.

” If you go to the gym, your whole body aches a lot for two weeks after. And then you get results. What I am trying to say is that you always need to invest something for the sake of some positive prospects... Any business starts with an investment.

30-year-old woman, Dnipro.

” I think that the state is like a woman. She needs to struggle through those nine months of pregnancy... to give birth to perhaps the dearest person in the world. The person who she may love more than her parents... It's the same here. The state, its people must suffer for a while to achieve results, but what is really important is to have those results.

33-year-old man, Lviv.

” Do we even have a choice? I don't think we do. So we just have to put up with this.

42-year-old woman, Dnipro.

At the same time, some respondents suggested that they were ready to endure certain material hardship (mostly from a few months to a year) if changes in the country result in higher standards of living for the population in the future. They mentioned certain conditions for this, in particular:

- reforms must have a clear direction;
- authorities must be consistent in implementing reforms;
- authorities must give detailed reports at each stage of reform;
- taxes in a country that undergoes reforms should be in proportion to the material wellbeing of an individual (for example, one per cent for those with an income of up to UAH 1,000, ten per cent for incomes up to UAH 100,000).

” I think everything depends on how things go... We can wait for a long time if there are visible results. Let these be baby steps, but it should be clear that some changes have taken place, followed by some other, even if small ones, but they should exist. In this case, we can wait... The most important thing is to see the direction, then people will wait. If there is no direction, people will have no patience...

27-year-old man, Dnipro.

” We need to wait but not too long, not so that our patience gets too thin.

47-year-old man, Lviv.

” Indeed, if you see that there are going to be results, when someone clearly explains why you need to have patience, you can put up with this. Otherwise they are just giving people a hard time.

35-year-old man, Lviv.

” I don't mind suffering but only as much as anyone else. If we chip in a thousand, they must give millions. Some country once suggested that its billionaires give a million each to lift it from the ruins. So why do we have to go through this when they don't want to?

44-year-old woman, Chernihiv.

Interestingly, some focus group participants suggested that the following restrictions were unacceptable during reforms:

- the population's incomes cannot go down when officials' salaries reach hundreds of thousands of hryvnyas;
- utility tariffs cannot be increased;
- the material status of the most vulnerable groups of the population cannot deteriorate.

” Perhaps, in times like this everyone needs to tighten their belts. It's therefore very unpleasant when a new government comes, young people get appointed with salaries that are so high that, if taken combined, they would be enough to support several Chernihivs... I cannot wrap my head around this: why do they need to be paid salaries of [UAH] 100,000 or 200,000?

61-year-old man, Chernihiv.

” I would say that no reform should adversely affect the socially unprotected groups of the population, including people with disabilities.

52-year-old man, Odesa.

3.5. HOW UKRAINIANS RATE REFORMS INTRODUCED SINCE INDEPENDENCE

One in five Ukrainians (19.3%) believes that the most effective reforms were implemented under President Petro Poroshenko. Some 13% say that the most effective reforms were launched under President Leonid Kuchma, 9.6% believe

this happened under Viktor Yanukovych, 4.3%, under Viktor Yushchenko, and 2.9%, under Leonid Kravchuk. Around one third of citizens (32%) believe that there have been no effective reforms in Ukraine under any president, and 18.9% selected the option »difficult to say«.

If we look at the breakdown of answers by respondents' region of residence, we can see that the largest share of those who think that reforms were most actively implemented under Petro Poroshenko live in the west (35.8%) and centre (23.9%) of Ukraine, while respondents in the east and south of the country believe that the most progress on reforms was achieved under President Leonid Kuchma (22.6% and 19.7%, respectively).

Focus group participants decided which was the most favourable period for the development of Ukraine exclusively on the basis of their own financial situation. The period most frequently mentioned was from 2010 to 2014, when Viktor Yanukovych and his Party of Regions were in power. They often spoke positively about the period that coincided with Leonid Kuchma's second term.

Respondents in almost all cities listed the following features of Viktor Yanukovych's time in office:

- stability;
- industrial development;
- the absence of steep increases in prices for various commodity groups;
- high salaries;
- increases in pensions and social benefits;
- higher birth rates.

According to respondents, Leonid Kuchma's tenure was best described by:

- the country's stable political course;
- industrial development;
- the start of private entrepreneurship.

However, some participants in the discussions on changes in the country recalled the years of Petro Poroshenko's presidency. They described this period as the most productive in terms of reforms:

- systemic reforms in various sectors were introduced;
- the European orientation of Ukraine's foreign policy was anchored;
- Ukraine received the tomos.

Graph 8

Responses to the question «In your opinion, under which of the previous presidents were the most effective reforms carried out?»

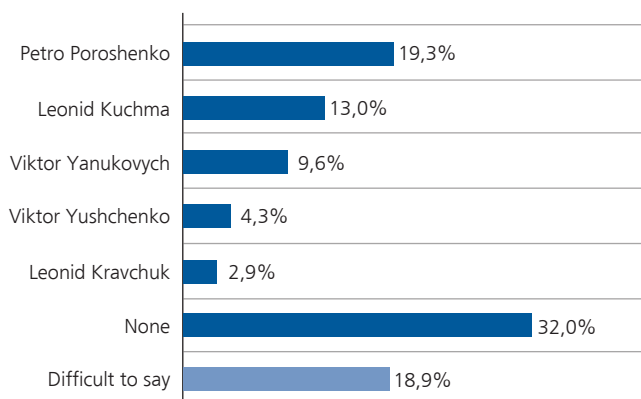


Table 6

Breakdown of responses to the question »In your opinion, under which of the previous presidents were the most effective reforms carried out?« by region

	REGION				
	North	Centre	East	West	South
Leonid Kravchuk	2,1%	3,6%	4,6%	2,0%	1,3%
Leonid Kuchma	14,0%	5,4%	22,6%	3,9%	19,7%
Viktor Yushchenko	4,5%	5,4%	3,8%	4,4%	3,0%
Viktor Yanukovych	5,7%	10,1%	17,2%	2,9%	14,1%
Petro Poroshenko	13,5%	23,9%	10,3%	35,8%	5,6%
None	39,1%	36,6%	24,3%	31,7%	31,6%
Difficult to say	21,1%	14,9%	17,2%	19,3%	24,8%

Let us take a closer look at the reforms launched by the previous authorities (under President Petro Poroshenko, Prime Ministers Arseniy Yatsenyuk and Volodymyr Groysman).

In terms of the reforms introduced after the Revolution of Dignity, Ukrainians above all recalled the healthcare reform (82.9%). However only one in six respondents (15.3%) experienced a positive impact from the reform, whereas for every second respondent (52.3%) the impact of the reform was negative. The positive results were mentioned most frequently in central Ukraine (22.1%) while the east (69.4%) and south (65.4%) tended to focus on the negative.

Most Ukrainian citizens (72.2%) were also aware of the police reform, with 20.6% referring to its positive results and 33.9% focusing on the negative ones. Most people who spoke highly of the reform live in the west (28.3%) and centre (25.4%) of the country. Negative feedback mostly came from respondents from the south (55.6%) and east (48.8%) of Ukraine.

Some 61.8% of Ukrainians were familiar with the decentralisation and local self-government reform, with 32.6%

saying they had experienced positive results and only 12.9% mentioning the negative ones. The positive effect of decentralisation was mostly keenly felt in the centre (42%) and west (40.4%) of the country, while respondents from the south spoke about negative experiences (20.1%).

It should also be noted here that every second Ukrainian citizen knew about anticorruption (53.6%), pension (48.3%), security and defence (48.1%) reforms. When it comes to the first two of these reforms, respondents mostly referred to negative impacts: anticorruption reform: 35.7%, pension reform: 27.7%. One in four respondents (25.3%) praised the defence reform.

Over one third of Ukrainians were aware of judicial (38.3%) and education (38.2%) reforms. In their experience, the results of judicial reform were mostly negative (22.7%). In terms of education reform, including the establishment of the New Ukrainian School, respondents' opinions were split almost equally: 12.3% mentioned the reform's positive results while 15.7% spoke of the negative impact.

Table 7

Responses to the questions »Do you know which reforms were launched under President Petro Poroshenko?« and »Have you experienced any positive/negative results from these reforms? If so, which?« (respondents could choose several options)

	Know	Positive results	Negative results
Security and defence reform	48,1%	25,3%	12,0%
Decentralisation and local self-government reform	61,8%	32,6%	12,9%
Anticorruption reform, establishment of anticorruption bodies	53,6%	6,3%	35,7%
Police reform	72,2%	20,6%	33,9%
Tax reform	22,6%	3,0%	12,6%
Pension reform, social security reform	48,3%	8,8%	27,7%
Election law reform	11,2%	3,2%	4,2%
Healthcare reform	82,9%	15,3%	52,3%
Education reform, establishment of the New Ukrainian School	38,2%	12,3%	15,7%
Judicial reform	38,3%	3,7%	22,7%
Prosecution reform	17,4%	1,9%	9,6%
Public administration reform	11,7%	2,7%	5,2%
Vetting of officials	35,4%	6,9%	17,9%
State procurement reform (ProZorro)	21,5%	7,7%	6,7%
Deregulation and business development	9,2%	2,2%	4,1%
Banking and financial reform	10,4%	2,3%	4,7%
Energy reform	19,3%	4,1%	10,0%
Housing and utilities reform (including the creation of condominium associations)	35,8%	15,1%	11,3%
E-governance development	11,0%	3,9%	4,4%
Other	1,1%	0,8%	0,4%
Difficult to say	6,4%	35,1%	19,2%

3.6. REFORMS INTRODUCED BY PRESIDENT VOLODYMYR ZELENSKYI'S TEAM

Overall, Ukrainians are quite optimistic about the prospects of reform in Ukraine under President Volodymyr Zelenskyy. As focus group participants in various regions of Ukraine put it, they base their positive expectations of reform being implemented by the current president's team on the following factors:

- Volodymyr Zelenskyy and his team demonstrate firm intention to drive changes in the country;
- the president can take unpopular steps which may negatively affect his rating;
- Volodymyr Zelenskyy's positive personal traits;
- positive examples of the achievements already accomplished (for example, the release of Ukrainian prisoners as part of a prisoner exchange between Ukraine and Russia as an example of the president's effective performance; lifting MPs' immunity from prosecution);
- »new faces« on Volodymyr Zelenskyy's team, who are not corrupt.

” I think that he is a generally ambitious person. In fact, if Zelenskyy dared to poke fun at the authorities, perhaps, he understood why things were the way they were. I don't think he will repeat their mistakes; if no one gets in his way, positive changes might happen here.

51-year-old woman, Lviv.

” I believe they tackled problems from the start. Look how he and his team immediately went on a tour of Ukraine, including Kharkiv, Odesa and Uzhhorod. I watched all those broadcasts about how they identified problems. Corruption, who did what. They send these people to the Security Service of Ukraine straight away. So that these people could be removed immediately.

35-year-old woman, Dnipro.

” Our prisoners in Russia have recently been released. He called the President of Russia directly.

42-year-old woman, Dnipro.

” Let us start by saying that from the very first days he has been showing that he is trying to do something and, one way or another, but over these two or three... How many? Over six months, there were things that people had been promised for years and he did just that. It is a big advantage! For example, MPs' immunity from prosecution.

39-year-old woman, Lviv.

Respondents' negative expectations regarding Volodymyr Zelenskyy and his team's capacity to implement effective reforms were mostly related to the following factors:

- Volodymyr Zelenskyy's lack of independence, his dependence on Ihor Kolomoyskyi;

- the president's actions not being strict enough;
- not fulfilling promises, lack of positive examples of Volodymyr Zelenskyy's actions;
- obstacles being put in his way by the previous authorities;
- »old faces« in the Verkhovna Rada;
- unpredictable behaviour of presidential team members.

” I don't know. The new president has been in office for over 100 days but there have been no positive developments anywhere.

53-year-old woman, Chernihiv.

” See, the issue here is that he is not an independent decision-maker. On the one hand, there is Kolomoyskyi hovering over him, on the other hand, there is the Soros Foundation. Had he got rid of them all and come to power on his own, using his own money earned from Kwartal [Zelenskyy's production company], he would have been an independent president.

61-year-old man, Dnipro.

” ... He promised to end the war but he did not... It would take more than two days.

61-year-old man, Dnipro.

” The new authorities are not as tough as the previous ones...

52-year-old man, Odesa.

” The most important thing is for young people to make it into parliament. Because old officials have compromising information about each other, they have their own businesses. It is such a spiders' web. Nothing will change until these people have been completely removed from their seats.

35-year-old woman, Dnipro.

Overall, focus group participants were mostly in favour of the new team carrying on all the reforms that were launched by the previous authorities. In their words, this should be done because the state has already spent significant amounts of money on the initial stages of reform.

They listed the following priority reforms:

- law enforcement reform,
- anticorruption reform,
- judicial reform,
- healthcare reform,
- pension reform.

In the course of discussions, respondents also pointed out that in addition to introducing sectoral reforms, Ukraine needs to reform its government apparatus. They suggested that it was necessary to crack down on the oligarchic »system« which has developed since Ukraine declared independence. They named several sectors where reform is necessary but which, in their opinion, the authorities are neglecting. These are the environment, culture and sports.

” All of this just needs to be completed. We have already spent money on this. We are on the track already... This is our main problem. Every authority comes up with initiatives and laws with a timeline of 10, 15, 20 years. But the authorities only have five [years]... So they did something for five years, started something. And then they couldn't care less what happens.

26-year-old woman, Odesa.

” I think that it is necessary to radically change everything. Above all, the anticorruption programme... This anticorruption programme will trigger changes in all other programmes. That's what I think. The pension [programme] must be radically changed, and the pension age must be lowered.

53-year-old woman, Kyiv.

” The top ones, perhaps, judicial and law enforcement [reforms]. If they work, if there is accountability, if there are normal conditions, they would be scared... They would start working on healthcare reform, they would make sure that everything is fine. Education [reform] must come next. One [reform] after the other, they will go on and on. Judicial and law enforcement.

39-year-old woman, Lviv.

Among the reforms planned by President Volodymyr Zelenskyy's team, land reform is the best-known reform among Ukrainians with 82.2% having heard of it. Some 32.7% of respondents consider it necessary, whereas 38.2% suggested that it was untimely.

Almost every second Ukrainian (46.8 per cent) had heard that the new authorities were going to implement a healthcare reform. Some 46% suggested that this was exactly the reform they should focus on.

Over one third of Ukrainian citizens (38.2%) had heard about the anticorruption reform, with 38.1% of respondents saying that the new authorities should focus on this very reform.

Ukrainians were also aware of the authorities' plans to carry out decentralisation and local self-government reform (25.1%) and judicial reform (20.8%). Some 23.9% believe the country's leadership should focus on judicial reform, 22.2% on local self-government reform.

Ukrainians expect reforms to produce practical results in the course of a year, as evidenced by 36% of responses. One in four respondents (24.8%) believes that the president

Table 8

Responses to the questions »Which of the reforms planned by President V. Zelenskyy and his team are you aware of?«, »In your opinion, which reforms should be the main focus of the new government?« and »Which reforms do you consider unnecessary or untimely?« (respondents could choose several options)

	Planned	Must be the focus	Unnecessary
Land reform	82,2%	32,7%	38,2%
Security and defence reform	18,7%	22,0%	1,6%
Decentralisation and local self-government reform	25,1%	22,2%	4,5%
Anticorruption reform, creation of anticorruption bodies	38,2%	38,1%	2,6%
Police reform	19,6%	17,1%	5,3%
Tax reform	18,2%	14,8%	3,4%
Pension reform, social security reform	31,2%	34,7%	2,5%
Election law reform	11,6%	7,1%	4,2%
Healthcare reform	46,8%	46,0%	3,8%
Banking and financial reform	12,1%	9,3%	6,7%
State property management reform (privatisation of state-owned companies)	18,8%	8,4%	9,6%
Judicial reform	20,8%	23,9%	2,8%
Prosecution reform	12,4%	13,3%	2,8%
Constitutional reform	14,8%	8,9%	6,1%
Public administration reform	8,9%	7,2%	2,1%
Vetting of officials	16,2%	15,5%	3,8%
State procurement reform (ProZorro)	8,4%	6,9%	1,7%
Deregulation and business development	10,0%	9,9%	2,8%
Energy reform	20,7%	24,9%	2,0%
Housing and utilities reform (including the creation of condominium associations)	16,0%	15,1%	3,2%
E-governance development	19,6%	11,9%	7,4%
Other	0,4%	0,7%	0,3%
Difficult to say	11,7%	17,2%	41,8%

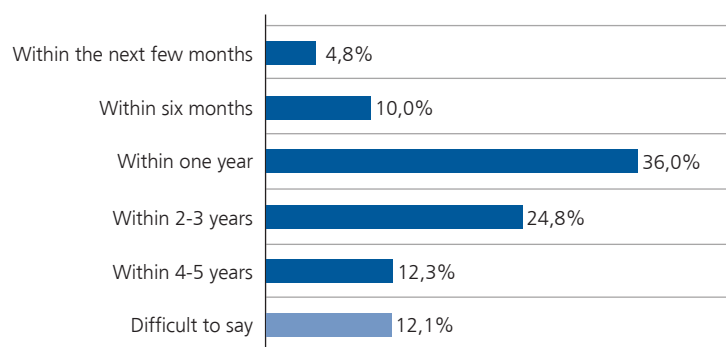
and his team must demonstrate the practical results of their reforms within two or three years, one in six respondents (12.3%) expected such results within four or five years, and one in ten Ukrainians (10%) expected reforms to produce results within six months.

lack of political will (22.7%), the armed conflict in Donbas (22.1%), Russia's interference in Ukraine's domestic policy (17.3%), differences within Volodymyr Zelenskyy's team (16.8%), a lack of funds in the state budget (11.3%), opposition and political opponents (10.2%).

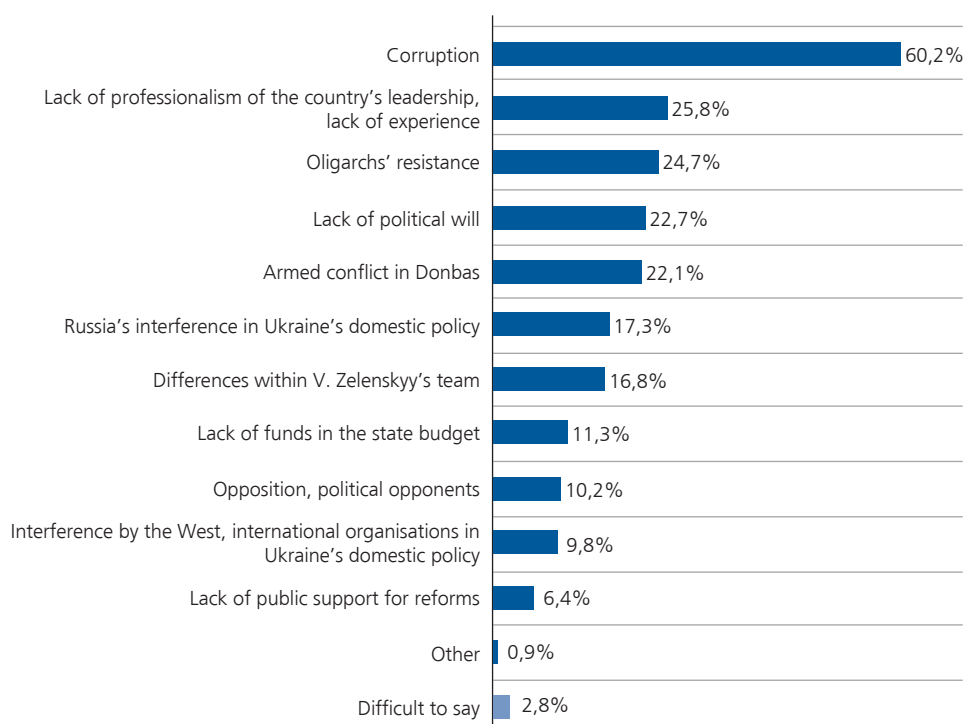
Most Ukrainians (60.2%) believe that corruption can prevent the new authorities from introducing reforms. Around a quarter of respondents stated that obstacles might include the lack of professionalism on the part of the country's leadership, lack of experience (25.8%) and oligarchs' resistance (24.7%). Other reasons which may prevent the new authorities from implementing reforms include the

At the same time, most Ukrainians (67.8%) did not think that corruption will be defeated during the five years of Volodymyr Zelenskyy's presidency (37.7%: »strongly disagree«, 30.1%: »rather disagree«). However, 21.2% believe that the incumbent head of state can cope with this task (3.9%: »strongly agree«, 17.3%: »rather agree«).

Graph 9
Responses to the question »In your opinion, how quickly must President V. Zelenskyy and his team demonstrate the practical results of reforms?«

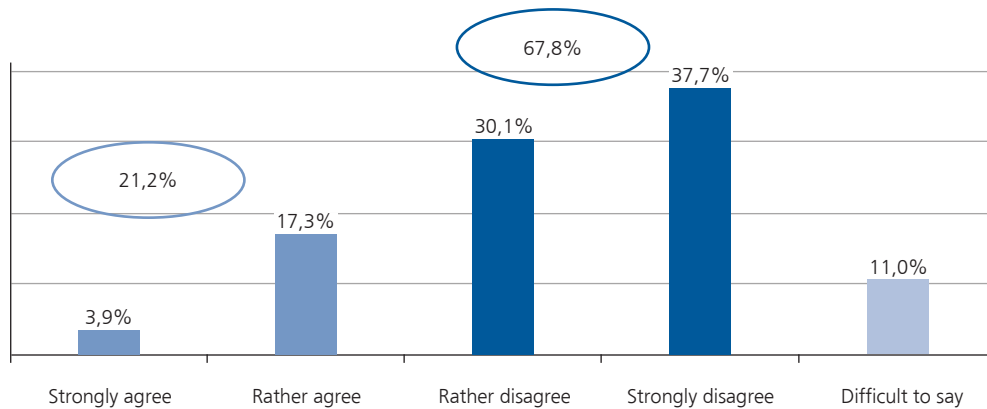


Graph 10
Responses to the question »What might prevent the new authorities from implementing reforms?« (respondents could choose up to three options)



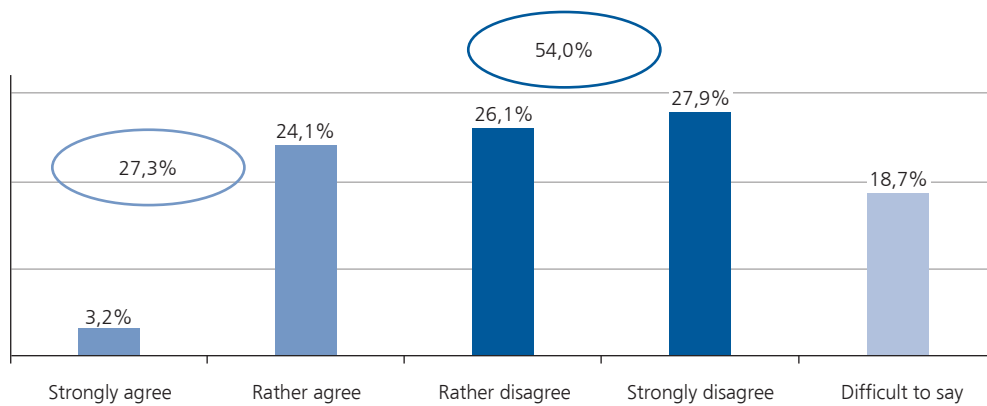
Graph 11

Responses to the question »Do you think that corruption will be defeated during the five years of Volodymyr Zelenskyy's presidency?«



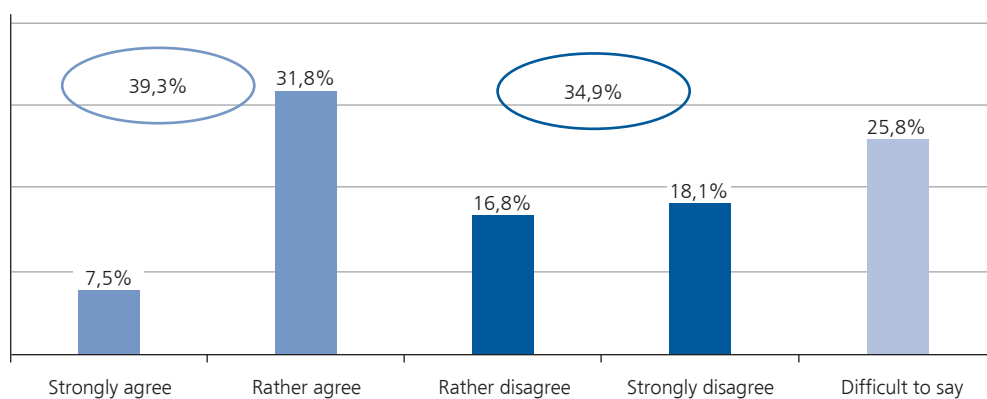
Graph 12

Responses to the question »Do you think that the country's economy will grow by 40% during the five years of Volodymyr Zelenskyy's presidency?«



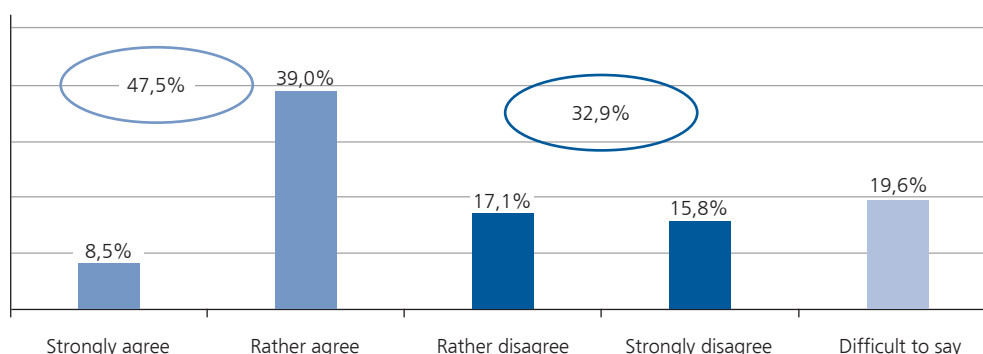
Graph 13

Responses to the question »Do you think that the Donbas conflict will be settled during the five years of Volodymyr Zelenskyy's presidency?«



Graph 14

Responses to the question «Do you think that 90% of government services will be provided electronically during the five years of Volodymyr Zelenskyy's presidency?»



Further, over half of Ukrainians (54%) did not expect the economy to grow by 40% during Volodymyr Zelenskyy's tenure (27.9%: «strongly disagree», 26.1%: «rather disagree»). One in four respondents (27.3%) was more optimistic and believes that the country's GDP can nearly double in the coming years (3.2%: «strongly agree», 24.1%: «rather agree»).

Prime Minister Oleksiy Honcharuk presented this ambitious economic goal after his government was formed.

At the same time, over a third of Ukrainian citizens (39.3%) believe that the Donbas conflict will be settled during the five years of Zelenskyy's presidency (7.5%: «strongly agree», 31.8%: «rather agree»). Slightly fewer people (34.9%) thought the opposite (18.1%: «strongly disagree», 16.8%: «rather disagree»).

Also, almost half of Ukrainians (47.5%) believe that 90% of government services will be provided electronically (8.5%: «strongly agree», 39%: «rather agree»). In contrast, one third of respondents (32.9%) did not believe in the full implementation of these plans by the new authorities (15.8%: «strongly disagree», 17.1%: «rather disagree»).

3.7. CITIZENS' ATTITUDES TOWARDS KEY SECTORAL REFORMS

We asked a number of questions about the key sectoral reforms: health and pension reforms, labour market reform, decentralisation, land reform, police reform, etc.

3.7.1. Healthcare reform

Let us recall that, according to the survey findings, of all the reforms launched by the previous authorities, healthcare reform is best known among Ukrainians (82.3%). At the same time, half of respondents (52.3%) stated that they had experienced negative results from this reform (see

Table 7). Slightly fewer respondents (46%) believe that Zelenskyy's team should prioritise this reform above the others (see Table 8).

Most respondents (54.9%) deem it necessary for the new authorities to carry on with the healthcare reform launched by their predecessors. Of them, 14.7% support the idea that the previous authorities' healthcare reform course should be continued in full. Some 40.2% believe that Volodymyr Zelenskyy's team should continue reforming the healthcare sector with certain adjustments. However, 30% of Ukrainians stated that the new authorities should launch a new reform from scratch. A total of 6.7% of respondents said that it was completely the wrong time for healthcare reform.

The breakdown of respondents' answers by region of residence shows that across Ukraine people recognise the need to reform the healthcare sector. However, the idea of carrying on with the changes planned and launched by the previous government is the most popular among residents of the centre (22.5%) and west (20.4%) of the country. More often than those living in other parts of Ukraine, respondents in the west (48.8%) and north (43.1%) are in favour of continuing healthcare reform with some adjustments. At the same time, twice the number of people in the east believe that it is necessary to start a completely new healthcare reform, with 42.8% supporting this option.

One of the most striking changes in healthcare for ordinary citizens in recent years was patients signing contracts with family doctors, therapists and paediatricians. The majority of respondents (82.1%) have already signed contracts with doctors, and only 16% have not done so.

Most Ukrainians (53.7%) share a positive opinion about the signing of contracts with primary care physicians, whereas 30.6% are critical of the system. A total of 15.7% could not make up their mind on the matter.

Graph 15

Responses to the question «Do you think that the new authorities should continue implementing the healthcare reform launched by the previous government?»

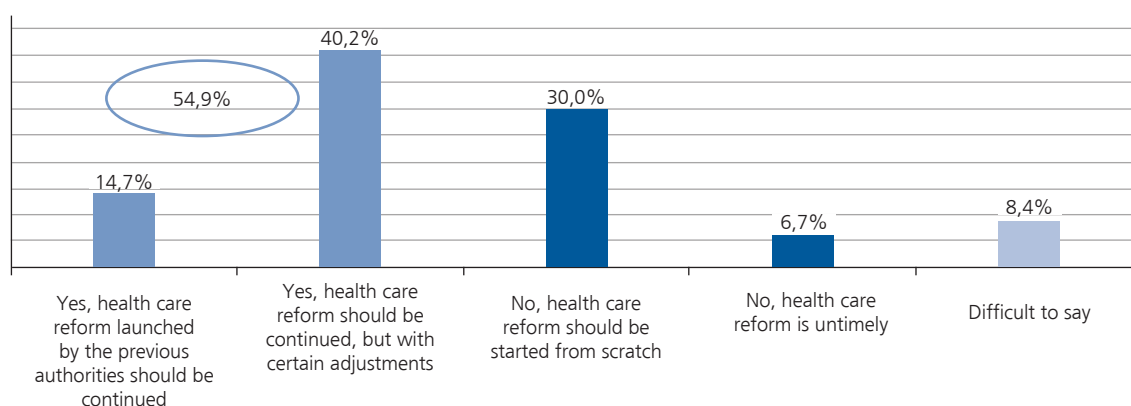


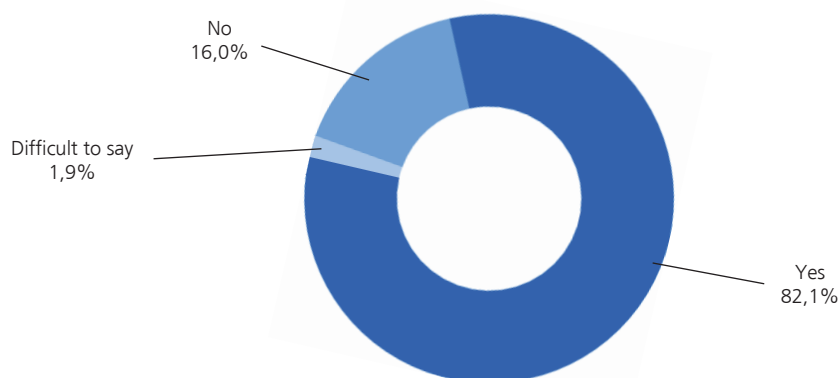
Table 9

Breakdown of responses to the question «Do you think that the new authorities should continue implementing the healthcare reform launched by the previous government?» by region of residence

	REGION				
	North	Centre	East	West	South
Yes, healthcare reform launched by the previous authorities should be continued	12,8%	22,5%	8,6%	20,4%	9,0%
Yes, healthcare reform should be continued, but with certain adjustments	43,1%	39,5%	33,5%	48,8%	30,3%
No, healthcare reform should be started from scratch	24,4%	25,7%	42,8%	16,3%	47,9%
No, healthcare reform is untimely	10,0%	5,8%	7,6%	5,1%	3,4%
Difficult to say	9,7%	6,5%	7,5%	9,4%	9,4%

Graph 16

Responses to the question «Have you signed a contract with a family doctor/therapist?»



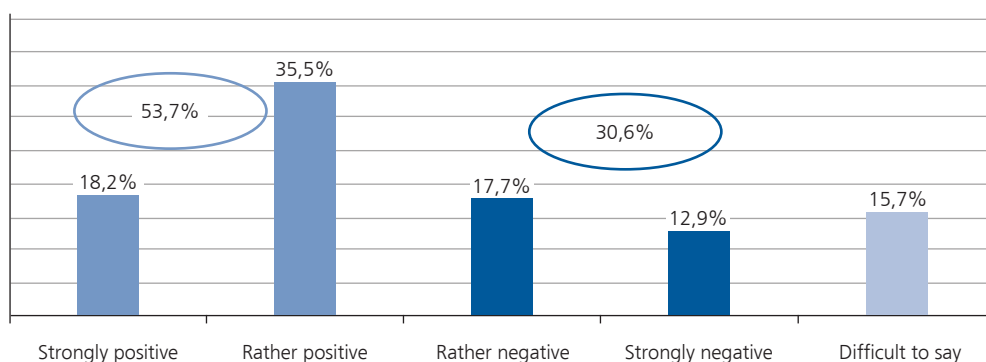
Most respondents (63.3%) support the idea of the president and his team launching state medical insurance in Ukraine (29.8%: «strongly positive», 33.5%: «rather positive»). Some 15.7% oppose this idea (6%: «strongly negative», 9.7%: «rather negative»). There were 21% of respondents who could not make up their mind on the matter.

If we look at focus group studies, we can see that respondents are quite receptive to the idea of healthcare

reform, however they repeatedly said that in practice, it often turned out not to be as effective as they had hoped. They name the following achievements of the previous government in healthcare: ability to independently choose a family doctor or therapist and sign a contract; medical institutions being equipped with computers; launch of an appointment booking service (e-queue); provision of certain groups of patients with free medication.

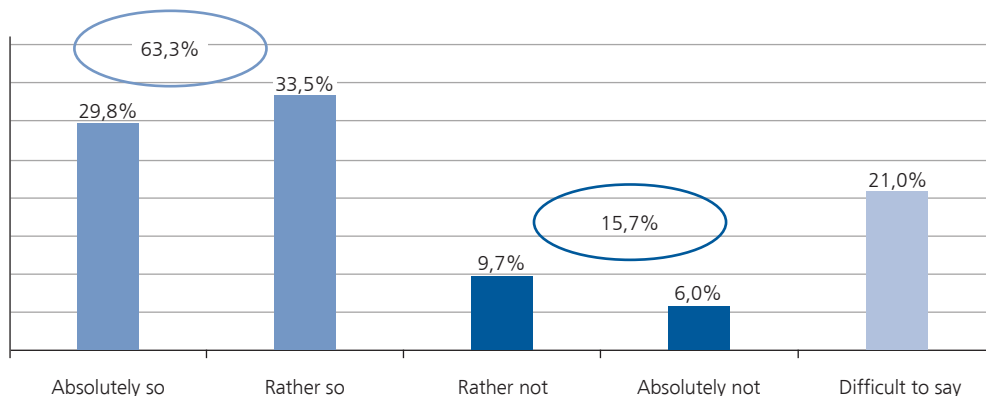
Graph 17

Responses to the question «What is your opinion on the system of patients signing contracts with primary care doctors (family doctor, therapist, paediatrician)?»



Graph 18

Responses to the question «Do you support the idea of Volodymyr Zelenskyy's team launching state medical insurance in Ukraine?»



However, it was mentioned on more than one occasion that patients, doctors and officials in the regions were not willing to accept all innovations in this area. Negatively commenting on the reform, several people mention former acting Health Minister of Ukraine Ulana Suprun.

Nevertheless, focus group participants and respondents of the mass survey believe that healthcare reform must be a priority for the new authorities. They also mentioned that healthcare reform had not been completed. Participants in discussions stressed that they had not heard from Volodymyr Zelenskyy's team about how they were going to continue this reform. Some of respondents say that it was important for Ukraine to introduce insurance-based medical care.

“ Healthcare reform is not finished yet. If it is completed, that would be excellent. Add medical insurance available to all to this and it will be absolutely perfect.
35-year-old woman, Kiev.

“ In my opinion, this reform is completely premature. No one was ready for it. Not financially, morally, in no way at all. It was simply pushed on us. I mean

people's perception, even I was not ready for what was happening.

51-year-old woman, Lviv.

“ Medical reform flopped in the regions. Because there are a lot of pitfalls. They designed it but there is no foundation. The mechanism and idea are good, but our people are not ready for this, they are not willing work out how to use the new system.
30-year-old woman, Dnipro.

“ ... They have started allocating money for drugs after all. I know because my parents are ill and now they get some cardiovascular medications, prescriptions are issued.
35-year-old woman, Dnipro.

“ My only experience with healthcare reform was when I signed these contracts.
20-year-old man, Kyiv.

“ You see, this Suprun is a black mark that will always be part of the history of our Ukraine. Just a nightmare!
68-year-old woman, Chernihiv.

3.7.2. Local self-government and decentralisation reform

Most Ukrainians (68.3%) believe that the new authorities should continue implementing the local self-government and decentralisation reform launched by the previous government. Of them, 28.7% were in favour of the full continuation of the reform that is already being implemented. At the same time, 39.6% of respondents suggest that decentralisation reform should continue with certain adjustments.

In contrast, 8.7% of respondents say that the authorities should start decentralisation reform from scratch. Some 5.8% believe that this reform was untimely.

If we look at the breakdown of responses by region of residence, we see that representatives of all regions believe that the new authorities must implement local self-government and decentralisation reform. The main difference is that in the east there are slightly fewer people (20.8%) who think that the reform launched by the previous authorities should be continued in full. By comparison, there are 33.6% respondents in the west who share this opinion.

Almost half of respondents (45.3%) mentioned positive changes that they had already observed in their town or city as a result of decentralisation (10.7%: »definitely positive«, 34.6%: »rather positive«). On the other hand, 11.6% believe that there were negative changes as a result of the reform (4.1%: »definitely negative«, 7.5%: »rather negative«). Moreover, one in three respondents (30.7%) say that there were no changes in their population centres.

Here it is worth pointing out that over half of respondents residing in the south and west of the country (53.4% and 51.4%, respectively) believe there had been positive changes as a result of decentralisation: 11.1% of respondents in the south referred to »definitely positive« changes in their population centres, 42.3% talked about »rather positive« changes; in the west, the corresponding figures were 12.1% and 39.3%, respectively.

In the centre and east of the country, people tended to say that decentralisation had not brought any changes to their population centres (40.2% and 34.6%, respectively).

Graph 19

Responses to the question »Do you think that the new authorities should continue implementing the local self-government and decentralisation reform launched by the previous government?«

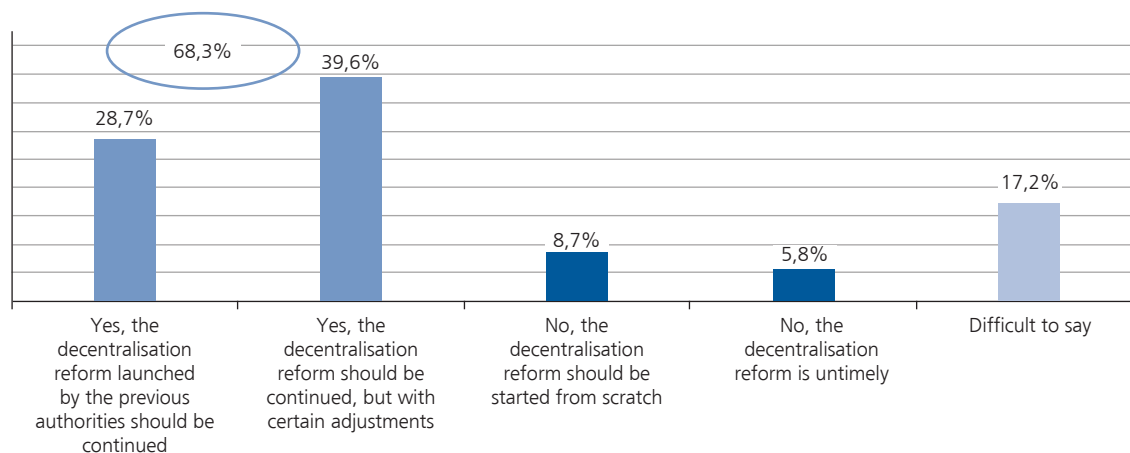


Table 10

Breakdown of responses to the question »Do you think that the new authorities should continue implementing the local self-government and decentralisation reform launched by the previous government?« by region of residence

	REGION				
	North	Centre	East	West	South
Yes, the decentralisation reform launched by the previous authorities should be continued	30,3%	31,9%	20,8%	33,6%	28,2%
Yes, the decentralisation reform should be continued, but with certain adjustments	37,9%	41,3%	42,8%	38,2%	36,8%
No, decentralisation reform should be started from scratch	8,8%	4,7%	10,9%	6,2%	13,7%
No, decentralisation reform is untimely	3,6%	5,4%	9,4%	5,7%	2,6%
Difficult to say	19,4%	16,7%	16,1%	16,3%	18,8%

Graph 20

Responses to the question »What changes have there been in your population centre as a result of decentralisation?«

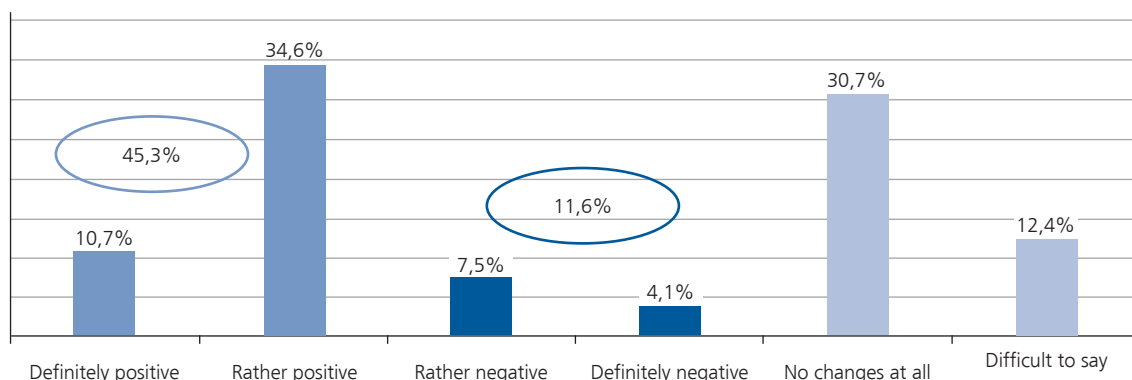


Table 11

Breakdown of responses to the question »What changes have there been in your population centre as a result of decentralisation?« by region of residence

	REGION				
	North	Centre	East	West	South
Definitely positive	14,0%	12,3%	5,5%	12,1%	11,1%
Rather positive	30,6%	31,9%	31,0%	39,3%	42,3%
Rather negative	7,3%	4,3%	10,3%	5,1%	10,3%
Definitely negative	5,9%	2,9%	3,6%	3,3%	4,7%
No changes at all	26,8%	40,2%	34,6%	29,4%	20,9%
Difficult to say	15,4%	8,3%	14,9%	10,8%	10,7%

These data match the figures cited earlier (when, of the reforms launched five years ago, respondents named decentralisation as the one that has had a positive impact on their life). A similar trend is evidenced by the results of focus group discussions during which respondents described local self-government and decentralisation reform as virtually the only successful one. It is also worth noting that this reform (like many others, including healthcare reform) is associated with the previous government.

” A very strong decentralisation reform has taken place. In my opinion, this is one of the fundamental reforms for the state because the direction of financial flows at the level of the country’s leadership has changed.

26-year-old woman, Odesa.

” At the moment, I like the decentralisation reform... There are communities now, their financing has improved. People in our village were left with almost no medical care in the past. And now the community, the head of the community, are taking care of this, he pays a salary to the nurse using the community money. People now feel more confident.

53-year-old woman, Chernihiv.

” I see this as an achievement by the previous government. Because... village budgets receive 60%

of the budget which they use to pay for their costs.
45-year-old woman, Kyiv.

” I will start with decentralisation because there were no roads, parks, nothing around my house for years... Now, because money does not go astray, to that treasury, it goes directly [to the regions] ...
33-year-old man, Kyiv.

” For example, there are private entrepreneurs, businesses that are registered locally. This money used to go somewhere: to a district, region, elsewhere. Now it arrives in the accounts of this population centre. And then this population centre decides where money should go and how much: a road should be built in one place, a garden or street lighting elsewhere.
39-year-old woman, Lviv.

” As for decentralisation, there is indeed some progress. Even if you recall Poroshenko’s visit to Odesa... And Trukhanov spent a long time speaking and thanking him. In the end, he said a key phrase: »Above all, I am thankful to you for not standing in our way.« And indeed, we see that a lot has been happening in recent years. I have lived in Odesa since I was born. I have never seen such global changes in the city as those happening literally in the last four or five years. Especially as far as the city itself is concerned.

52-year-old man, Odesa.

3.7.3. Land reform

Almost half of Ukrainians (47.4%) are not in favour of permitting Ukrainian citizens and companies to buy farmland. Asked »Do you think that Ukrainian citizens and Ukrainian companies should be permitted to buy/sell farmland?«, 33.7% of respondents answered »strongly disagree«, while 13.7% chose the option »rather disagree«.

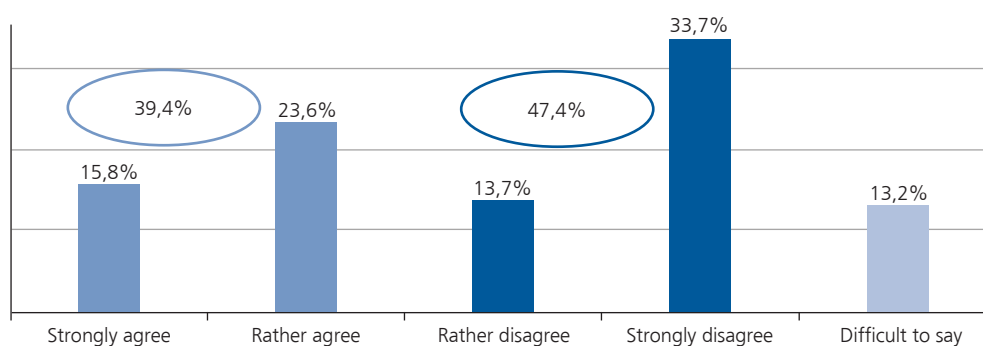
In contrast, 39.4% of respondents support the introduction of a land market for Ukrainians (15.8%: »strongly agree«, 23.6%: »rather agree«).

At the same time, most Ukrainian citizens (86.1%) oppose the sale and purchase of farmland by foreign citizens and companies. Some 72.7% flatly say that they »strongly disagree«, while 13.4% opted for »rather disagree«.

It is also worth mentioning that the survey has found that around three quarters of Ukrainian citizens (74.4%) do not have a plot of land, while some 22.8% said they own a plot of land.

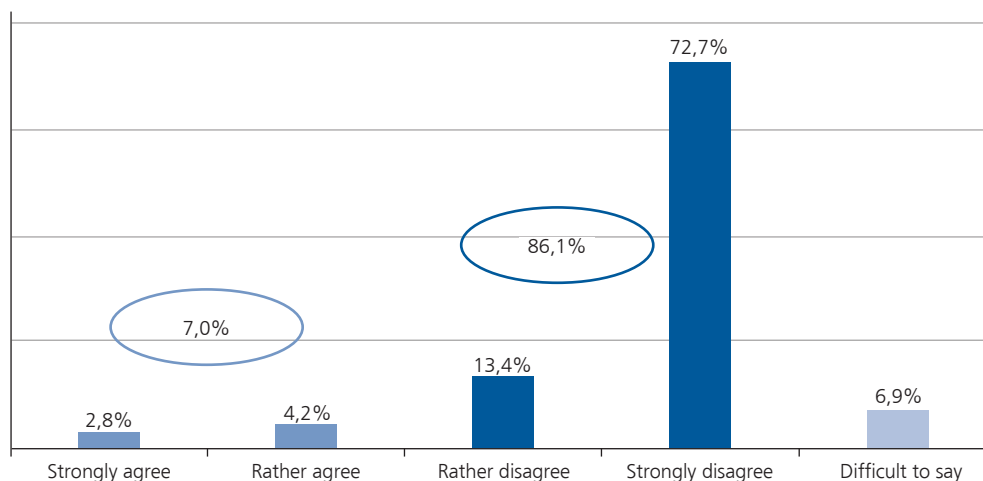
Graph 21

Responses to the question »Do you think that Ukrainian citizens and Ukrainian companies should be permitted to buy/sell farmland?«



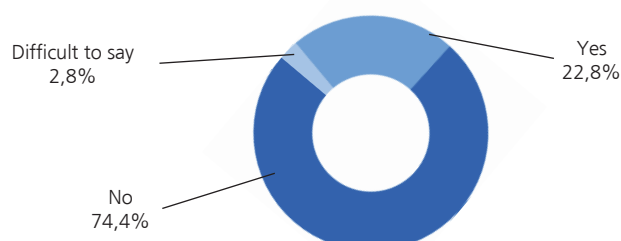
Graph 22

Responses to the question »Do you think that foreign citizens and foreign companies should be permitted to buy/sell farmland?«



Graph 23

Responses to the question »Do you own a plot of land?«



3.7.4. Privatisation of state-owned companies

The majority of Ukrainians opposes the privatisation of state-owned companies or parts thereof, in particular the state-owned concern Ukroboronprom (Ukrainian Defence Industry) (76.9%), state-owned banks (72.5%), state-owned ports (72.4%), Ukrzaliznytsya (Ukrainian Railways) (69.7%), state-owned mines (64.5%), Ukrspyrnt (beverages) (63.9%) and Ukrposhta (Ukrainian Postal Service) (63.7%).

3.7.5. Police reform

As was mentioned above, police reform is the second most well-known reform launched by the previous government: 72.2% of respondents have heard about it. In addition, one in five Ukrainians (20.6%) felt the results of this reform had been positive, while one in three (33.9%) had a negative experience of the reform (see Table 7).

Some 17.1% of respondents believe that President Volodymyr Zelenskyy’s team should focus on police reform, which is not a particularly high figure. By comparison, 46% of Ukrainians named healthcare reform as a priority, 38.1% opted for anticorruption reform and 34.7% expressed their support for pension reform (see Table 8).

Of relevance here is that, according to the survey findings, most Ukrainian citizens (88.4%) said that neither they nor their families and friends have had to give a bribe to the police in the past year. At the same time, 7.7% of respondents confessed to having had such an experience over the past year.

3.7.6. Legalisation of gambling and amber extraction

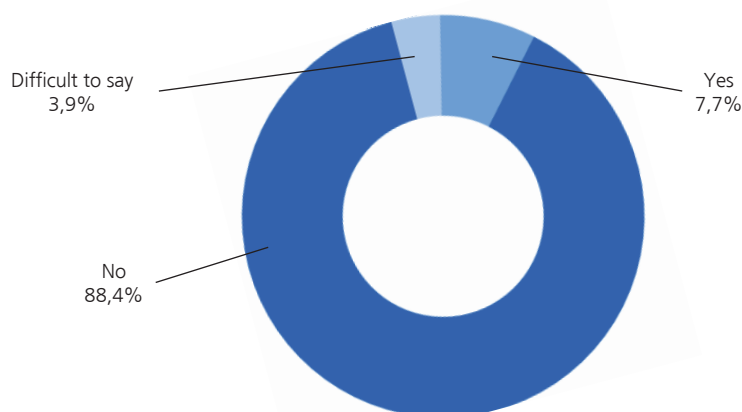
One of the priorities announced by the new government is the decriminalisation of the gambling business. Survey findings show that almost every second Ukrainian (45.7%) supports the legalisation of the gambling business: 26.9% of respondents said that they »strongly agree« and 18.8% chose »rather agree«. Almost the same number of respondents (46.3%) opposes the legalisation of the gambling business in Ukraine: one third of respondents (34.2%) opted for »strongly disagree« and 12.1% went for »rather disagree«.

Another initiative proposed by the new government team is the legalisation of amber extraction. Most respondents (70.8%) support it (41.1%: »strongly agree«, 29.4%: »rather agree«) and only 14.6% oppose it (7.8%: »strongly disagree«, 6.8%: »rather disagree«). There were 14.6% of respondents who could not answer the question.

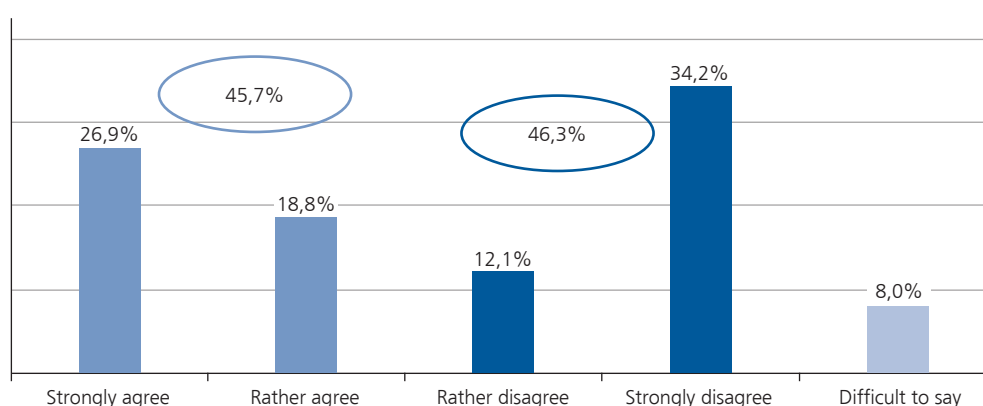
Table 12
Responses to the question »Do you think the following state-owned companies should be privatised, fully or partially?«

	Yes, in full	Yes, partially	No	Difficult to say
Ukrzaliznytsya	7,3%	12,8%	69,7%	10,2%
Ukrposhta	10,4%	14,5%	63,7%	11,4%
Ukrspyrnt	10,2%	12,9%	63,9%	13,0%
State-owned banks (Oschadbank, PrivatBank, Ukreximbank)	4,5%	11,6%	72,5%	11,4%
Enterprises of the state-owned concern Ukroboronprom	5,1%	7,0%	76,9%	11,0%
State-owned mines	9,3%	12,5%	64,5%	13,7%
State-owned ports	7,4%	10,0%	72,4%	10,2%

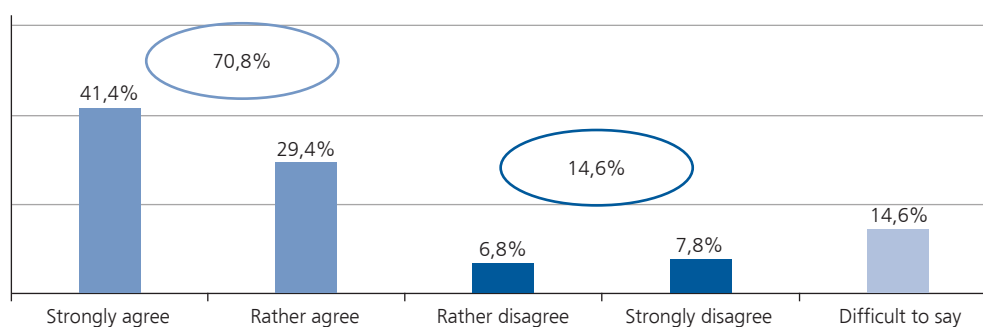
Graph 24
Responses to the question »Have you or your families and friends had to give a bribe to a policeman in the past year?«



Graph 25
Responses to the question «Do you support the government's initiative to legalise the gambling business?»



Graph 26
Responses to the question «Do you support the government initiative to legalise amber extraction?»



3.7.7. Pension reform

Let us recall that one third of Ukrainians (34.7%) believe that President Volodymyr Zelenskyy and his team should focus on pension and social security reforms (see Table 8).

Some 40.5% of citizens support the idea of moving from the pay-as-you-go pension system to the defined contribution pension system (14%: «strongly positive», 26.5%: «rather positive»), while 35.8% oppose the idea (17.2%: «strongly negative», 18.6%: «rather negative»). One quarter of respondents (23.7%) found it difficult to answer the question.

The breakdown of the answers to the question about the pension system by respondents' age showed that Ukrainians who fall into the 18-29 and 30-44 age brackets are more inclined to support the idea of moving from the pay-as-you-go pension system to the defined contribution pension system than older people.

By comparison, the all-Ukrainian study «Ukrainians' attitudes towards social democracy» (n=2,000), which was conducted by the Gorshenin Institute and Friedrich Ebert Foundation in Ukraine in 2018, asked Ukrainians what sort of pension system the country should have. Over one third of respondents said that Ukraine's pension system should be pay-as-you-go (36.4%) or mixed (pay-as-you-go and based on defined contributions) (36.2%). Nearly one in five Ukrainians (18.5%) said that the country should have a defined contribution pension system. There were 0.6% of respondents who chose the «other» option and 8.3% could not make up their mind.

In the same study, most respondents (94.9%) noted that the quality of pension provision in Ukraine is low (64.9%: «definitely low», 30%: «rather low»). Only 3.7% of respondents said that pension provision in the country is of high quality (0.2%: «definitely high», 3.5%: «rather high»).

Graph 27

Responses to the question »How do you feel about the idea of moving from the pay-as-you-go pension system (money to pay pensions is taken from working citizens' taxes) to the defined contribution pension system (deductions from salaries are accumulated in special accounts)?«

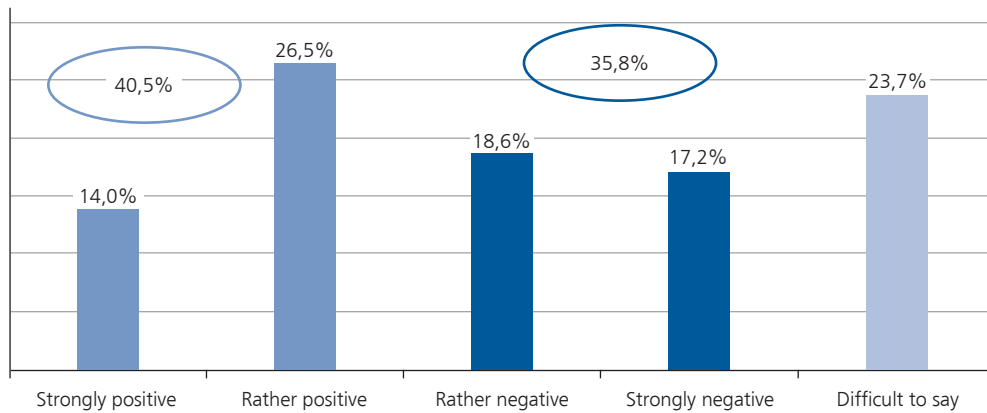


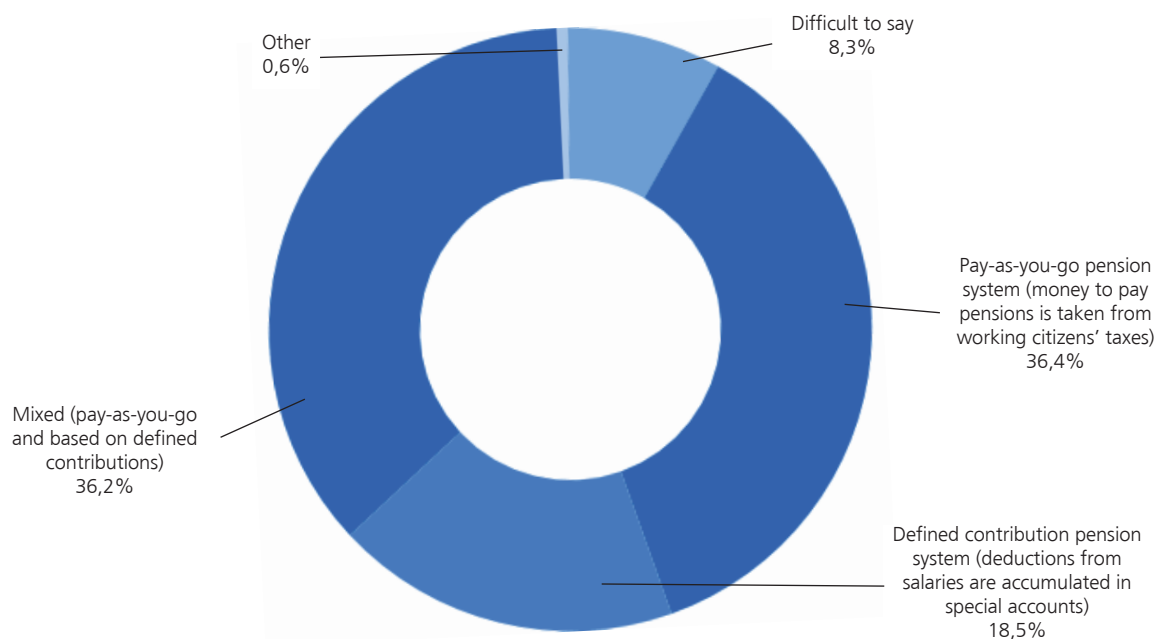
Table 13

Breakdown of responses to the question »How do you feel about the idea of moving from the pay-as-you-go pension system (money to pay pensions is taken from working citizens' taxes) to the defined contribution pension system (deductions from salaries are accumulated in special accounts)?« by age

	AGE			
	18-29	30-44	45-59	60 and over
Strongly positive	17,1%	18,0%	12,6%	10,1%
Rather positive	32,5%	32,9%	26,3%	18,0%
Rather negative	13,9%	13,5%	21,5%	22,5%
Strongly negative	9,9%	14,1%	18,0%	23,0%
Difficult to say	26,7%	21,5%	21,5%	26,3%

Graph 28

Responses to the question »In your opinion, what sort of pension system should Ukraine have?« (2018 survey, n=2,000)



3.7.8. Reform of labour law

We also asked Ukrainians about one of the hottest topics being debated by experts in the context of government efforts to develop a draft of the new Labour Code, namely the expansion of reasons for and simplification of the dismissal procedure.

The vast majority of respondents do not agree that the new Labour Code should give employers the right to dismiss pregnant women and women on maternity leave (94.4%), employees on annual leave or sick leave (93.1%), and people with disabilities (92.8%).

3.7.9. Tax reform

In spring 2019, parliament passed a number of laws significantly expanding the mandatory use of cash registers and electronic fiscal devices for sole proprietors. These novelties caused a stir in the media and generated a lively debate among experts.

Interestingly, every other citizen (50.2%) supports the mandatory introduction of cash registers for sole proprietors (25.9%: »absolutely«, 24.3%: »rather yes«) whereas over a quarter of respondents (29.2%) oppose the idea (14.4%: »absolutely not«, 14.8%: »rather not«).

Graph 29

Responses to the question »How would you rate the quality of pension provision in Ukraine?« (2018 survey, n=2,000)

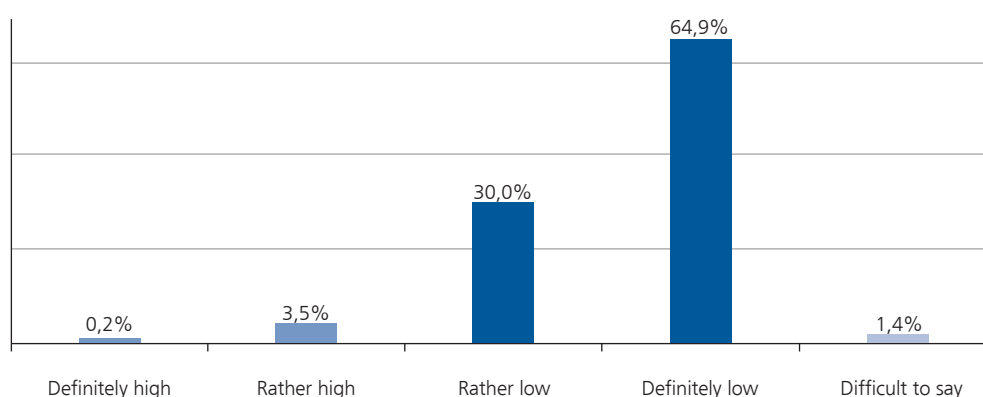


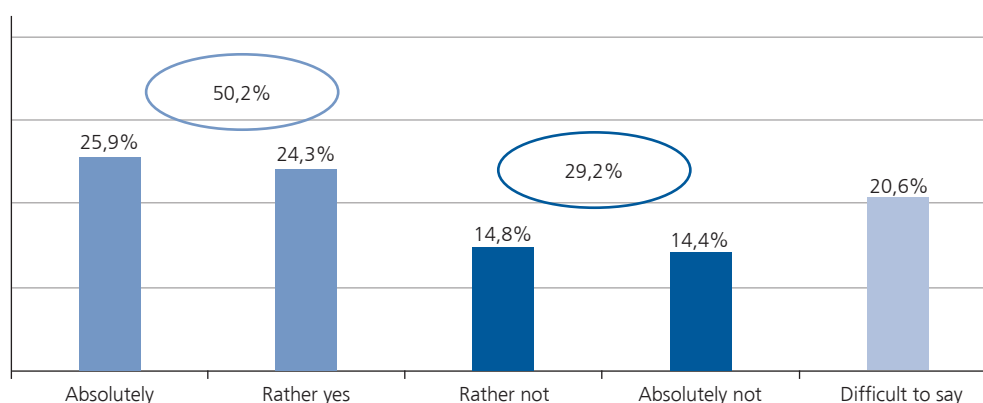
Table 14

Responses to the question »The Ukrainian government is developing a new Labour Code. Do you agree that this document should give employers the right to dismiss...?«

	Strongly agree	Rather agree	Rather disagree	Strongly disagree	Difficult to say
...employees on annual leave or sick leave	0,6%	2,6%	14,5%	78,6%	3,7%
...pregnant women and women on maternity leave	0,6%	1,6%	12,8%	81,6%	3,4%
...people with disabilities	1,4%	1,3%	12,7%	80,1%	4,5%

Graph 30

Responses to the question »Do you support the mandatory introduction of cash registers for sole proprietors?«



3.8. WAYS OF SETTLING THE CONFLICT IN DONBAS

As part of the study, respondents were asked a number of questions on what they consider to be an acceptable price to pay for settling the armed conflict in eastern Ukraine.

In public opinion, what is an acceptable sacrifice for the country to achieve peace in Donbas?

According to the study findings, Ukrainian citizens deem it unacceptable to transfer control of Ukraine's gas transportation system to Russia (77.7%) and recognise Crimea as Russian territory (77.6%). Ukrainians are also flatly opposed to a full amnesty for militants of the self-proclaimed Donetsk and Luhansk People's Republics (DPR and LPR) and local elections in the temporarily occupied territories of Donbas on the militants' terms (68.7%).

In addition, the majority of respondents object to the establishment of local police, courts and prosecutors' offices

in certain districts of the Donetsk and Luhansk regions (collectively known as ORDLO) exclusively comprising local representatives (61.9%). They also oppose the enshrining of a »special status« for ORDLO in the Constitution of Ukraine (55.7%).

Some 59.9% of respondents flatly oppose the federalisation of Ukraine. However, 22.1% think the opposite. Almost every second respondent (56.5%) considers it unacceptable to give the Russian language the status of the country's second official language whereas one third of respondents (32.8%) are of the opposite opinion.

It is worth pointing out that respondents consider it unacceptable for Ukraine to move from its European course (61.4%). However, this would be an acceptable scenario for almost a quarter of respondents (23.1%). At the same time, over half of respondents (54.8%) consider it unacceptable for Ukraine to give up its aspirations for NATO membership. However, almost one third of Ukrainians (29.9%) consider this to be an acceptable option.

Table 15

Responses to the question »Which compromises do you consider acceptable/unacceptable in order to achieve peace in Donbas?«

	Acceptable	Unacceptable	Difficult to say
Federalisation of Ukraine	22,1%	59,5%	18,4%
Enshrining of a »special status« for certain districts of Donetsk and Luhansk regions in the Constitution	27,6%	55,7%	16,7%
Local elections in the temporarily occupied territories of Donbas on militants' terms	17,4%	68,7%	13,9%
Full amnesty for DPR and LPR militants	11,9%	72,4%	15,7%
Establishment of local police, courts and prosecutors' offices in ORDLO formed exclusively by local representatives	17,5%	61,9%	20,6%
Recognition of Crimea as Russian territory	9,0%	77,6%	13,4%
Ukraine's moving from European course	23,1%	61,4%	15,5%
Ukraine's giving up on NATO membership bid	29,9%	54,8%	15,3%
Russian having status of the second official language	32,8%	56,5%	10,7%
Transfer of control of Ukraine's gas transport system to Russia	6,4%	77,7%	15,9%

4

CONCLUSIONS

This qualitative and quantitative study shows that Ukrainians are deeply disappointed that the many reforms announced and initiated by the authorities at various times since Ukraine's independence have not been implemented to completion. Moreover, some focus group participants noted that the government's attempts to introduce any changes were more of an »imitation of reform« used by politicians to conceal corruption schemes and embezzle budget funds.

Despite this, citizens are relatively optimistic about the situation in Ukraine today. Thus, more than a third of respondents in the mass survey said that the country was developing in the right direction, which is twice as many as there were on the eve of the presidential election campaign a year ago. In particular, this figure is due to a large credit of trust in President Volodymyr Zelenskyy.

However, Ukrainians are quite restrained when it comes to assessing the prospects of developments in the country and the possibility of implementing effective reforms. Thus, participants in the discussions were concerned about the possible deterioration of the situation because of the continuing armed conflict in Donbas, pressure from Russia and Western partners on Ukraine, and corruption. Respondents also mentioned the inexperience of Volodymyr Zelenskyy and his team, and their possible dependence on oligarchs.

It would be fair to say that there is demand in society for systemic change in the country. Moreover, according to the majority of citizens, these changes should be initiated by the state leadership, first and foremost by the president. Respondents stressed that the key to the successful implementation of reform is a strong leader, the political will of the state leadership, as well as the relevant legal framework.

At the same time, according to the study, Ukrainians do not consider the actions of citizens and society as a whole to be a decisive factor for such changes. This shows that paternalistic sentiments and belief in a strong political leader, not faith in one's own strength, prevail in Ukrainian society.

According to respondents, the role of international partners in advancing reforms is not crucial either. In addition, when assessing the impact of Western countries and inter-

national organisations on the implementation of changes in the country, 33.8% described it as positive. Almost the same number of people (32%) talked about the negative impact of Western partners. Interestingly, this indicator depends on the age of respondents: young people aged 18-29 tended to give positive answers, while those over the age of 60 opted for negative ones. This situation may be the result of the Russian propaganda rhetoric aimed at changing Ukraine's pro-Western course. The main slogan used by this propaganda is »Ukraine is under external control«.

It is also important to point out that Ukrainians are quite well informed regarding the many reforms that have been launched in the country in recent years, and they have even felt the effects of these changes. In the focus group discussions, the reforms that featured most prominently were healthcare reform, decentralisation of power, police reform, as well as judicial reform and education reform. However, the attitudes towards these reforms, with the exception of decentralisation, are quite pessimistic.

A similar trend is observed in the quantitative study. According to the results of the survey, Ukrainians felt the most positive effects resulted from the reform of local self-government and decentralisation of power. When respondents were asked what changes had taken place in their population centres as a result of decentralisation, almost half of them said that these changes had been positive (with positive changes being more frequently mentioned by residents of the south and west). However, a third of respondents said that there had been no changes at all. At the same time, the vast majority of respondents believe that the new government should continue decentralisation reform either as it was conducted by their predecessors, or with some adjustments.

According to the survey, healthcare reform is the most widely known (82.9% were aware of it). Almost the same number of people (82.1%) have already signed contracts with their family doctors or therapists. At the same time, more than half of Ukrainians (52.3%) believe that this reform has had negative consequences for them. In the west and centre, the assessment of this reform is slightly more favourable than in other regions of the country. The worst perception of changes in healthcare is among those living in the east.

The survey also showed that the vast majority of respondents believe that the current government should pursue healthcare reform as one of its highest priorities. The response most frequently given was that it was necessary to continue the reform, which has already begun, but with certain adjustments. As regards the innovations in medical care, the majority of respondents support the idea of launching state medical insurance in Ukraine.

Another notable reform was police reform. One in three respondents said that they had felt the negative impact of this reform, and one in five respondents said that the results of the reform were positive for them personally. Also, the vast majority of Ukrainians answered that over the past year they or their relatives had not had to give bribes to the members of the police force that was established during the reform.

When speaking about which areas Volodymyr Zelenskyy's team should focus on, respondents of the qualitative research mentioned the following reforms: health, anticorruption, pension, land, energy, judicial and decentralisation.

It is striking that hardly any respondents said that any of the reforms mentioned were unnecessary today. In this sense, land reform was an exception: more than a third consider it untimely. The same trend was observed with regard to the introduction of a land market: almost half of respondents oppose granting permission to Ukrainians to buy and sell farmland. At the same time, the vast majority of respondents said that foreigners should not be allowed to buy Ukrainian land.

The study also found that Ukrainians are sceptical about the privatisation of state-owned companies and do not believe that private companies can run these services effectively. The vast majority of citizens do not support the idea of full privatisation or sale of certain parts of large state-owned companies such as Ukrzaliznytsya, Ukrposhta, Ukrspyrnt, as well as state-owned banks, ports, mines and defence enterprises.

In the course of the discussions, respondents spoke not only about the need to reform certain industries, but also about restructuring the work of the state apparatus per se. They repeatedly expressed the idea that it is necessary to eradicate the oligarchic »system«, which has developed since Ukraine declared independence. They also identified several areas of social life that need to be reformed but, according to focus group participants, are neglected by the authorities. Above all, they mentioned the environment, culture and sports.

According to the results of the study, it can also be concluded that Ukrainians are very receptive to populist decisions. This is why simple and highly public, but not always realistic statements by politicians are perceived positively by the Ukrainian public.

In particular, most Ukrainians believe that it is possible to simultaneously carry out reforms in the country and im-

prove social standards. At the same time, when respondents of the quantitative survey were asked whether they were willing to endure temporary financial hardship for the success of reforms, the majority answered in the negative. Focus group participants also often seemed reluctant to step out of their comfort zone, being fearful of change and uncertainty.

In the course of the survey, respondents said that the government should demonstrate the practical results of their reforms in the near future. The most common opinion was that people should feel the effects of the reforms within a year. This trend can also be attributed to the demand for populist policies and quick solutions. At the same time, if Volodymyr Zelenskyy and his team fail to show specific evidence of changes to the country in a relatively short period of time, this may become a contributing factor to more public disillusionment with the government.

It should also be emphasised that, despite the fact that Ukrainians have high hopes for President Zelenskyy, according to opinion polls, they do not believe that the current head of state will be able to overcome the main obstacle to effective reform, which is corruption.

It is worth mentioning that during focus group discussions on the issue of corruption, respondents held public servants, officials and law enforcement agencies fully responsible for solving this problem. At the same time, according to the study, the population is not prepared to oppose this phenomenon itself. In addition, participants in the discussions criticised corruption »at the highest level« but, at the same time, considered it acceptable to use »connections« to »solve problems« if necessary.

The topic of reform is closely linked with the country's overall domestic and foreign policy agenda. One of the defining issues here is the armed conflict in eastern Ukraine. Ukrainians are at odds over whether the situation in Donbas is likely to be resolved during Volodymyr Zelenskyy's presidency, with a third of Ukrainians believing that the president's team will be successful in this regard and almost as many people having no faith in that happening. One in four respondents appeared undecided on the issue. Against this background, it is important to note that the majority of citizens consider it unacceptable to compromise for the sake of peace. According to Ukrainians, the most unacceptable scenarios include the recognition of Crimea as Russian territory, the transfer of control of Ukraine's gas transportation system to Russia, as well as a full amnesty for the militants of the so-called DPR and LPR. However, a third of respondents said that Russian could be given the status of the second official language, with almost 30% in favour of giving up on Ukraine's NATO membership bid.

Interviews and focus group studies show that there is demand in Ukrainian society for the continuation of reforms and changes. The Ukrainian government, which currently enjoys public support, thus needs to use this window of opportunity to implement the most important reforms.

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FRIEDRICH EBERT FOUNDATION REPRESENTATION IN UKRAINE

The Friedrich Ebert Foundation is a political fund headquartered in Germany. Our activities are focused on the key ideas and values of social democracy: freedom, justice and solidarity. Our international cooperation is facilitated by a network of representative offices in over 100 countries around the world. Our efforts are aimed at supporting peaceful cooperation and human rights, providing assistance to the creation and consolidation of democratic institutions based on the principles of social

justice and rule of law, such as free trade unions and strong civil society.

We actively stand for a social, democratic and competitive Europe in the framework of European integration processes. Guided by these principles since its opening in 1996, the FES Representation in Kyiv has supported dialogue with Ukrainian partners on a wide range of issues such as sustainable democratic development and human safety.

REFORM IN UKRAINE: CHANGE FOR THE BETTER OR AN IMITATION OF PROGRESS?



There is demand for systemic reform in Ukrainian society. The majority of citizens believe that these changes must be initiated by the country's leadership, primarily by the president.



Healthcare reform, police reform and decentralisation are the most widely known reforms launched since the Revolution of Dignity. Some 82.9%, 72.2% and 61.8% of the population have heard about them. However, only 15.3%, 20.6% and 32.6%, respectively have had a positive experience with the results of these reforms.



Most citizens consider compromise for the sake of peace and the settlement of the armed conflict in eastern Ukraine unacceptable. Citizens are of the opinion that the most undesirable developments for Ukraine would include the recognition of Crimea as Russian territory, the transfer of control of Ukraine's gas transportation to Russia and a full amnesty for militants in the so-called Donetsk and Luhansk People's Republics (DPR and LPR).