



USAID | **KOSOVO**
NGA POPULLI AMERIKAN
OD AMERIČKOG NARODA

KCBS SATISFACTION SURVEY

KOSOVO CLUSTER AND BUSINESS SUPPORT PROJECT



19 January 2007

This publication was produced for review by the United States Agency for International Development. It was prepared by the KCBS project team of Chemonics International Inc. based on a Final Report prepared by Management and Development Associates [MDA].

KCBS SATISFACTION SURVEY

THE KOSOVO CLUSTER AND BUSINESS SUPPORT [KCBS] PROGRAM COMPLETED ITS FIRST TWO YEARS IN SEPTEMBER 2006, AND HAS TWO MORE YEARS TO FULFILL. THIS REPORT DESCRIBES THE FINDINGS OF A SURVEY OF THE VARIOUS STAKEHOLDERS IMPACTED BY THE PROGRAM. THE SURVEY EVALUATES THE EXTENT TO WHICH STAKEHOLDERS ARE INFORMED ABOUT THE PROGRAM, PARTICULARLY ITS MAIN OBJECTIVES; THEIR RELATIVE SATISFACTION WITH THE DELIVERY OF THE PROGRAM BY THE KCBS TEAM; AND THE RELATIVE BENEFITS THAT THEY HAVE GAINED FROM BEING A STAKEHOLDER IN THE PROGRAM. THE REPORT CONCLUDES WITH SOME RECOMMENDATIONS FOR FUTURE FOCUS AND ACTIVITIES THAT MIGHT BE ADDED TO THE PROGRAM.

Kosovo Cluster and Business Support project "KCBS Satisfaction Survey"
Contract No. AFP-I-00-03-00030-00, TO #800

This report submitted by Chemonics International Inc. 19 January 2007

The author's views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.

CONTENTS

PURPOSE OF ASSIGNMENT	1
BACKGROUND	1
EXECUTIVE SUMMARY	2
FIELD ACTIVITIES TO ACHIEVE PURPOSES	3
TASK FINDINGS AND RECOMMENDATIONS	4
CONCLUSIONS AND RECOMMENDATIONS FOR FUTURE ACTIVITY	25
ANNEXES	28

PURPOSE OF ASSIGNMENT

The purpose of this assignment is to conduct a survey of the various stakeholders impacted by the Kosovo Cluster and Business Support Program. The Program has completed its first two years, and has two more years to complete. The survey will evaluate the extent to which stakeholders are informed about the program, particularly its main objectives; their relative satisfaction with the delivery of the program by the KCBS team; and the relative benefits that they have gained from being a stakeholder in the program.

BACKGROUND

A. Program Goals:

The KCBS program is to stimulate economic growth and to improve employment opportunities for Kosovar citizens. Tangible results sought under this contract will contribute to new employment opportunities by removing many of the administrative barriers to investment and job creation, turning the governing authorities into competent supporters of business growth, and increasing and improving the overall economic performance of enterprises and industries in at least the three identified business clusters: Livestock, Fruit and Vegetables and Construction Materials.

- ◆ Overarching objective: To Accelerate Private Sector Growth.

The program envisions an activity that will be implemented through two separate components to reach the overall goal.

- Component 1, General Business Support: This component is directed toward developing and putting into operation a program to overcome factors known to be inhibiting economic growth and employment.
- ◆ Component Objective: To Improve the Business Operating Environment
 - Component 2, Cluster and Enterprise Development: This component is directed toward working with and facilitating focused assistance to address whatever aspect of the clusters is inhibiting a selected industry's growth.
- ◆ Component Objective: To Increase the Competitiveness of the Clusters

B. Mid-Program Review:

In a mid-Term evaluation of the KCBS program undertaken for USAID by SEGURA/IP3 Partners LLC, the consultants were asked by USAID "What improvements should be made in the KCBS performance monitoring system?" In their report to USAID, SEGURA recommended that KCBS conducts Client Satisfaction Surveys semi-annually using independent contractors.

It has been agreed with USAID that early in Year Three of the program, KCBS will contract with a local business service provider to carry out the first survey. The parties to be surveyed will be the project's stakeholders. These include KCBS cluster clients and other enterprises in the three clusters indirectly impacted by KCBS interventions; local association boards; local business service providers [BSPs] and NGOs to whom KCBS has contracted work, either through grants or subcontracts; Ministries and their Departments with which KCBS has interacted and which have supposedly benefited from the KCBS project and its interventions; and other donor organizations.

EXECUTIVE SUMMARY

MDA – Management and Development Associates - was contracted by KCBS to conduct a Stakeholder Satisfaction Research targeting both the Stakeholders and the Cluster Clients. The project had the following phases:

- Design different questionnaires for two target groups,
- Conduct the surveys,
- Deliver a report with findings, conclusions and recommendations,

59 Cluster Clients Surveys and 40 Stakeholder Surveys were completed. The preferred method of surveying the above mentioned people was face to face; however, some of the clients preferred to complete the survey by other means. Hence, some surveys were conducted using other methods of communication such as email, fax, and phone.

In answering questions – other than those requiring a straight “Yes” or “No” answer - interviewees were asked to rate their answers 1 through 5, where 1 = poor; 2 = fair; 3 = satisfactory; 4 = good; and 5 = exceptional. If some interviewees answered a question with “Not Applicable” these interviewees were excluded from the size of the sample when determining the overall average response to that question

On the 15 questions that were asked of Cluster Clients, which required a rating answer, the average score was 3.85; on the 12 questions that were asked of Stakeholders, which required a rating answer, the average score was 3.98.

The final question asked of interviewees was “what other services and assistance did they think KCBS should provide to the business community? (services, clusters, events, workshops, seminars, trainings)”. [It should be noted that additional financial assistance as an answer was excluded]. The most frequently made requests by Cluster Clients were for more trainings, seminars and workshops; technical assistance from experienced international experts; and assistance in understanding and getting access to regional markets. The Stakeholder interviewees also most frequently requested more trainings, seminars and workshops; they also requested assistance in certification processes, and more involvement by KCBS with the financial institutions.

MDA conclude that overall, Cluster Clients are satisfied with the level of advisors and experts provided by KCBS. However, KCBS should stress the importance of involvement of cluster clients in the KCBS project, and should strive to reach out to every business belonging to the cluster sectors and provide them with information regarding the services that KCBS can provide. MDA recommend that KCBS conduct a needs analysis with all cluster clients to help when compiling the yearly plan for educational seminars and workshops. MDA also recommend that KCBS prepare a weekly or monthly newsletter in which KCBS services would be explained and offered to all cluster clients.

As a result of the Stakeholder survey, MDA make similar recommendations that KCBS improve the communication of its role and activities, as well as the project’s achievements. MDA also suggest that KCBS should research the possibility of including other clusters in the program. While the attendance in seminars/workshops of surveyed stakeholders was 93%, and the quality and quantity of seminars/workshops scored 3.8 out of 5, MDA recommend that KCBS should implement better quality control when implementing seminars/workshops. This conclusion is prompted as a result of some of the comments received in answer to the final question about additional services.

FIELD ACTIVITIES TO ACHIEVE PURPOSES

The initial number of surveys that we projected on conducting in our research was 110 (10 more than requested). Of these, 60 were to be Cluster Clients and 40 were to be Stakeholders. The reason why we chose a higher number of individuals to take the survey is because of our concerns that the desired number of surveys conducted would not be reached. The 110 targeted individuals were chosen randomly from their group and assigned as shown in the table below:

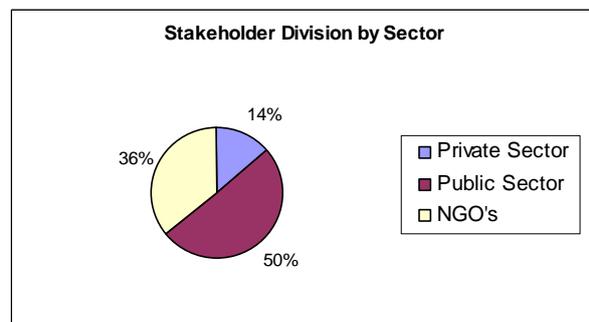
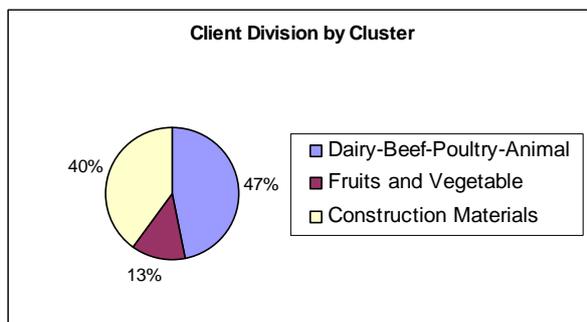
Type	Number	Interaction level with KCBS			Nationality		
		3	2	1	Albanian	Serb	Other
Clusters	64	34	12	18	55	9	0
Stakeholders	46	28	16	2	35	2	9
Sub-Total		62	28	20	90	11	9
Total	110	110			110		

The goal for completing 40 Stakeholder Surveys has been achieved. The areas in which we faced difficulties achieving the projected number of surveys were with the Cluster Clients. We initially faced some difficulties due to wrong contact information. While we made many attempts to reach/meet these individuals, in many cases we failed. In the end we managed to complete 59 Client Surveys.

The formats for the surveys are shown in the Annexes. The preferred method of surveying the above mentioned people was face to face; however, some of the clients preferred to complete the survey by other means. Hence, some surveys were conducted using methods of communication such as email, fax, and phone.

All interviewees, both Cluster Clients and Stakeholders, were asked at the end of the interview what other services and assistance did they think KCBS should provide to the business community? (services, clusters, events, workshops, seminars, trainings). Specifically, financial assistance was excluded. All the comments from the surveys have been extracted and translated (if needed) without reformulating them. Comments from the Cluster Clients were separated by cluster; and from Stakeholder Clients separated by Private Sector, Public Sector and NGOs. Several answers were given repeatedly.

Cluster members targeted for this survey belonged to all three KCBS clusters: Dairy-Beef-Poultry-Animal Feed, Fruits and Vegetable, and Construction Materials. Information was gathered from 59 out of 60 (98.33% of target) individuals chosen randomly by MDA and approved by KCBS. We made numerous attempts to contact and meet the remaining individual, but were unsuccessful. Stakeholders targeted for this survey belonged to the Private, Public and NGO sectors. Information was gathered from 40 individuals (100% of target) chosen randomly by MDA and approved by KCBS. Distribution of the interviewees by cluster and sector is shown below:



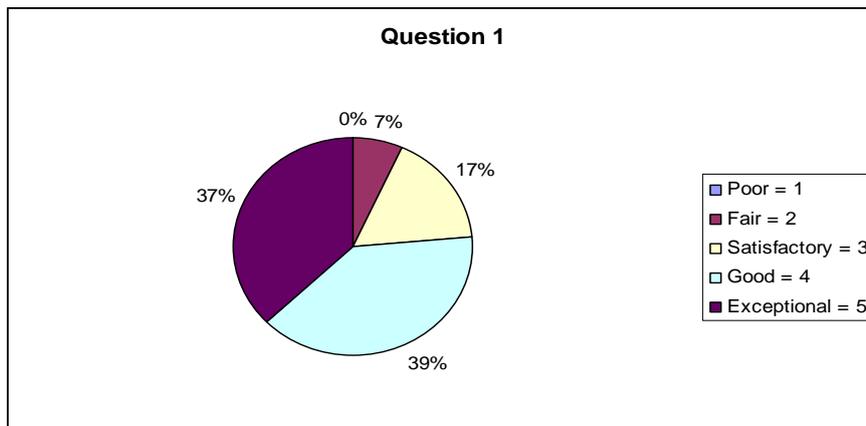
TASK FINDINGS AND RECOMMENDATIONS

A. CLUSTER CLIENT SURVEY

Question 1: How informed are you about the KCBS program and its role?

The overall average is 4.1 out of 5.

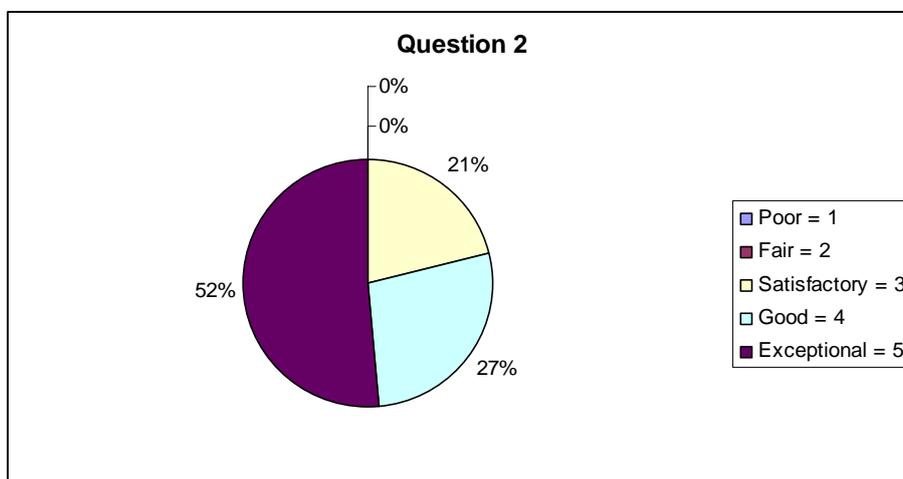
Valuation Marks	1	2	3	4	5	NA	Total
Dairy-Beef-Poultry-Animal Feed	-	3	6	8	9	-	26
Fruits and Vegetable	-	-	2	5	6	-	13
Construction Materials	-	1	2	10	6	-	19
Other	-	-	-	-	1	-	1



Question 2: How would you rate the communication of the main KCBS activity?

The overall average is 4.0 out of 5.

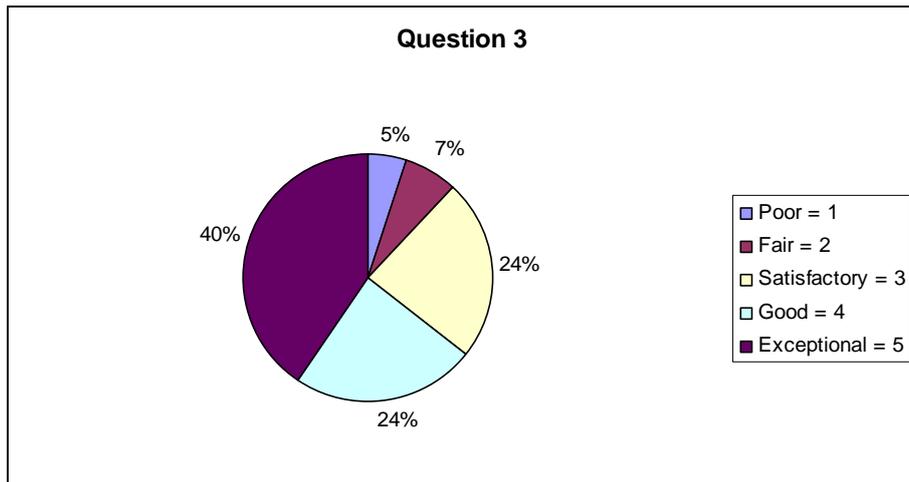
Valuation Marks	1	2	3	4	5	NA	Total
Dairy-Beef-Poultry-Animal Feed	3	1	6	7	9	-	26
Fruits and Vegetable	-	-	4	4	5	-	13
Construction Materials	-	-	3	4	12	-	19
Other	-	-	-	1	-	-	1



Question 3: How would you rate KCBS's staff involvement in helping you expand or start a new venture?

The overall average is 3.9 out of 5.

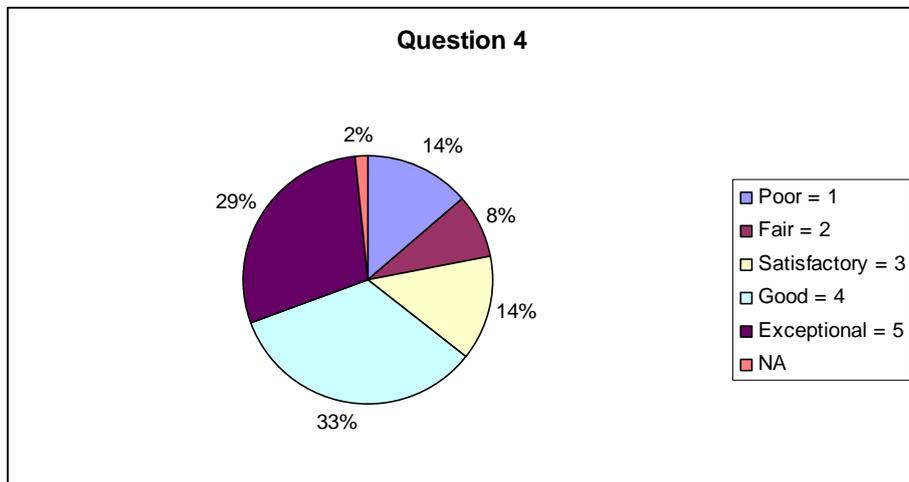
Valuation Marks	1	2	3	4	5	NA	Total
Dairy-Beef-Poultry-Animal Feed	3	2	8	5	8	-	26
Fruits and Vegetable	-	-	3	5	5	-	13
Construction Materials	-	2	3	4	10	-	19
Other	-	-	-	-	1	-	1



Question 4: How satisfied are you overall with the help you have received from KCBS?

The overall average is 3.6 out of 5. One person marked this question NA.

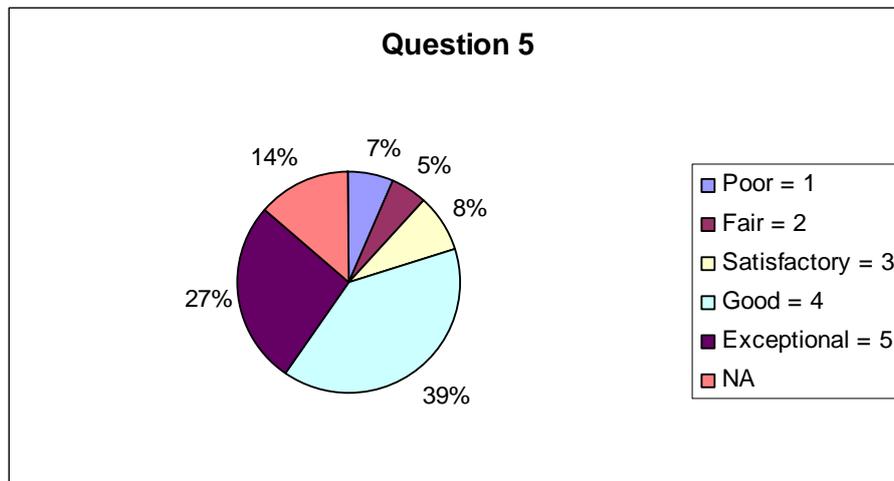
Valuation Marks	1	2	3	4	5	NA	Total
Dairy-Beef-Poultry-Animal Feed	6	4	3	8	4	1	26
Fruits and Vegetable	1	1	2	4	5	-	13
Construction Materials	1	-	3	8	7	-	19
Other	-	-	-	-	1	-	1



Question 5: How would you rate customer service and responsiveness at KCBS?

The overall average is 3.9 out of 5. One person marked this question NA.

Valuation Marks	1	2	3	4	5	NA	Total
Dairy-Beef-Poultry-Animal Feed	4	2	2	13	4	1	26
Fruits and Vegetable	-	1	2	6	4	-	13
Construction Materials	-	-	1	4	7	7	19
Other	-	-	-	-	1	-	1



Question 6: Have you ever Attended an educational seminar and/or workshop organized by KCBS? (Yes / No)

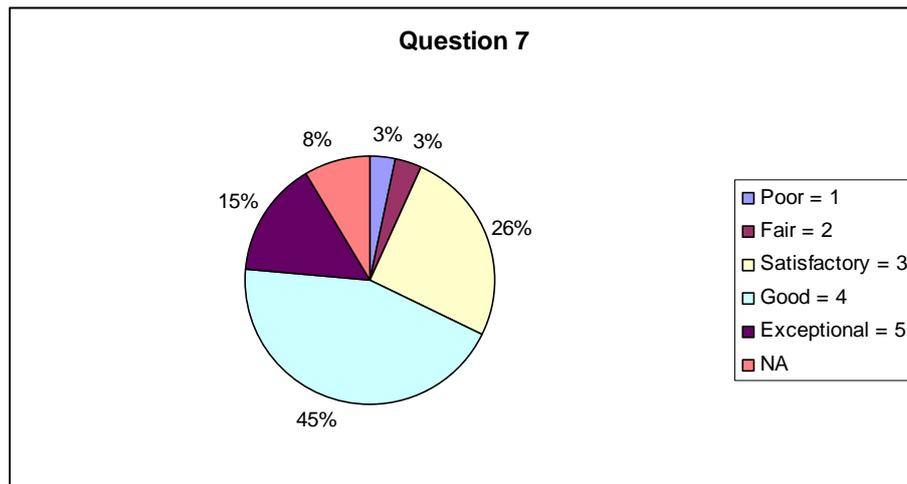
52 out of 59 (88%) of cluster clients have attended an educational seminar and/or workshop organized by KCBS.

Valuation Marks	Yes	No	Total
Dairy-Beef-Poultry-Animal Feed	24	2	26
Fruits and Vegetable	11	2	13
Construction Materials	16	3	19
Other	1	-	1

Question 7: If yes, how would you rate the quantity of educational seminars and workshops?

The overall average is 3.7 out of 5. Five persons marked this question as NA.

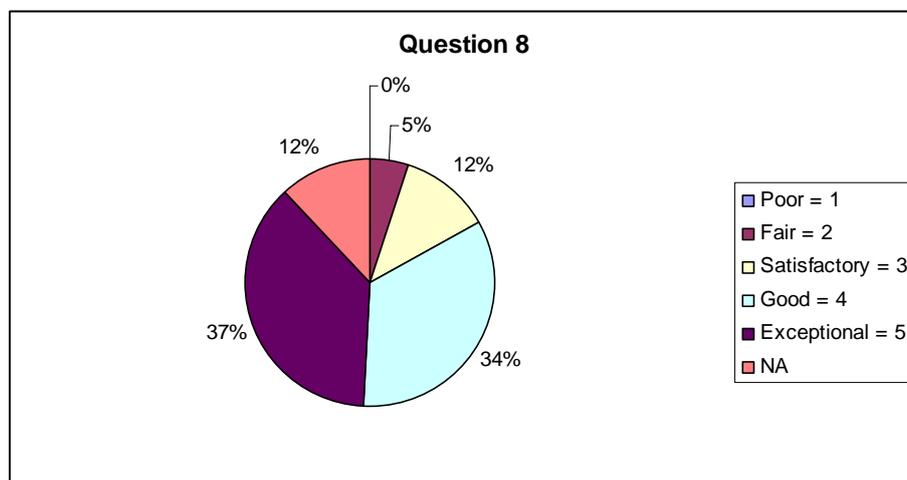
Valuation Marks	1	2	3	4	5	NA	Total
Dairy-Beef-Poultry-Animal Feed	2	1	10	8	4	1	26
Fruits and Vegetable	-	-	2	7	2	2	13
Construction Materials	-	1	3	10	3	2	19
Other	-	-	-	1	-	-	1



Question 8: If yes, how would you rate the quality of educational seminars and workshops?

The overall average is 4.2 out of 5. Seven persons marked this question as NA.

Valuation Marks	1	2	3	4	5	NA	Total
Dairy-Beef-Poultry-Animal Feed	-	2	4	9	10	1	26
Fruits and Vegetable	-	-	2	4	5	2	13
Construction Materials	-	1	1	7	6	4	19
Other	-	-	-	-	1	-	1



Question 9: Have you been awarded a grant or sub-contract by KCBS? (Yes / No)

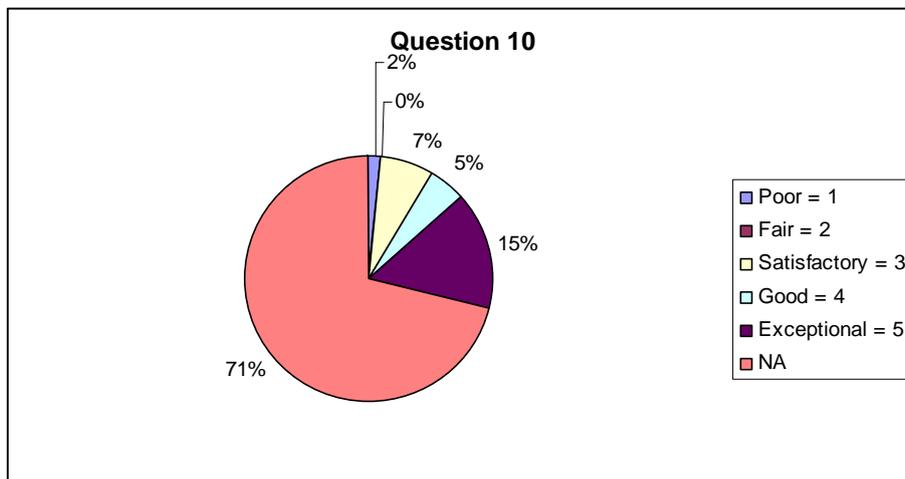
15 out of 59 (25%) of cluster clients have been awarded a grant or sub-contract by KCBS. 75% of surveyed cluster clients have not been awarded a grant or sub-contract. Two persons answered NA.

Valuation Marks	Yes	No	NA	Total
Dairy-Beef-Poultry-Animal Feed	8	16	2	26
Fruits and Vegetable	5	9	-	13
Construction Materials	1	17	-	19
Other	1	1	-	1

Question 10: If yes, how would you rate your relationship with KCBS regarding the grant or sub-contract?

The overall average is 4.3 out of 5. Forty two persons (71% of people surveyed) marked this question as NA.

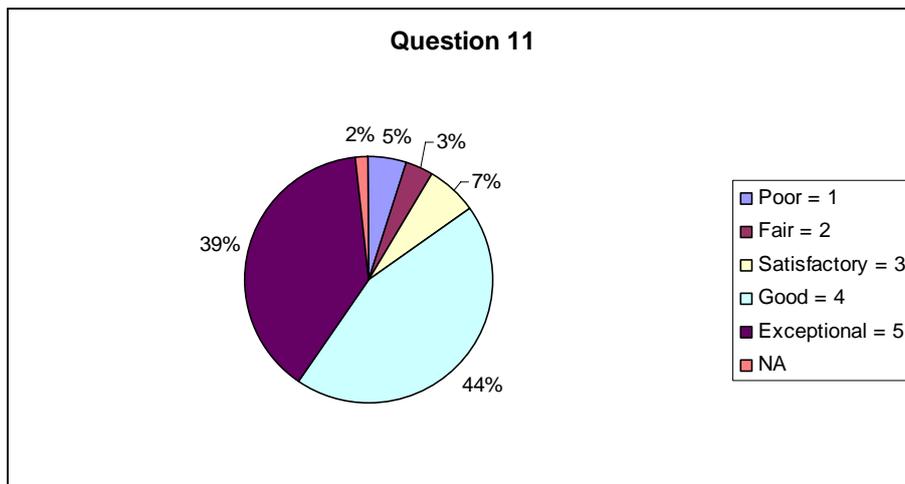
Valuation Marks	1	2	3	4	5	NA	Total
Dairy-Beef-Poultry-Animal Feed	1	-	2	1	4	16	26
Fruits and Vegetable	-	-	-	1	4	8	13
Construction Materials	-	-	-	-	1	17	19
Other	-	-	-	-	1	1	1



Question 11: How would you rate KCBS in quality of communication?

The overall average is 4.1 out of 5. One person marked this question as NA.

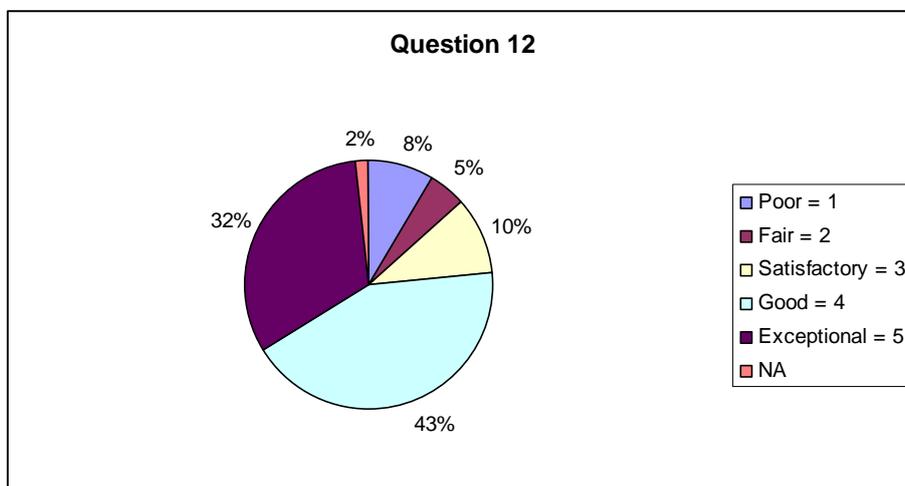
Valuation Marks	1	2	3	4	5	NA	Total
Dairy-Beef-Poultry-Animal Feed	3	1	3	10	9	-	26
Fruits and Vegetable	-	-	-	8	5	-	13
Construction Materials	-	1	1	8	8	1	19
Other	-	-	-	-	1	-	1



Question 12: How would you rate KCBS in providing you with networking opportunities within clusters?

The overall average is 3.9 out of 5. One person marked this question as NA.

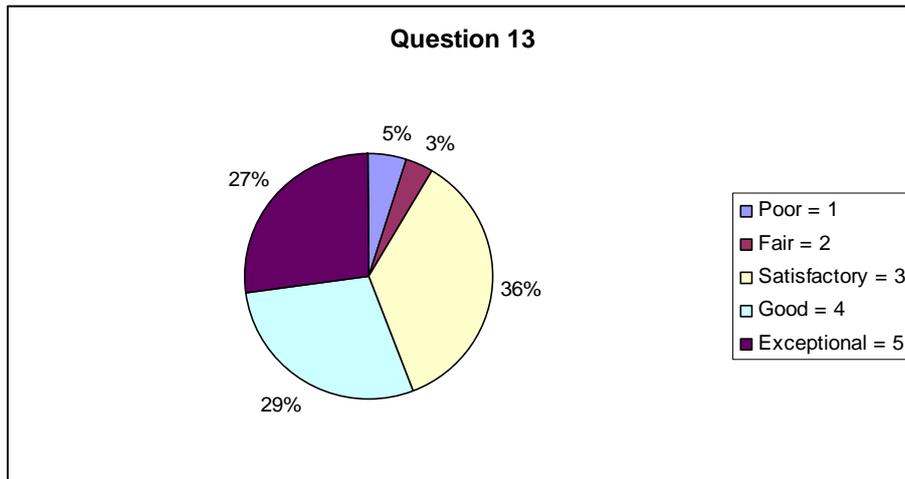
Valuation Marks	1	2	3	4	5	NA	Total
Dairy-Beef-Poultry-Animal Feed	5	1	3	8	8	1	26
Fruits and Vegetable	-	-	3	8	2	-	13
Construction Materials	-	2	-	8	9	-	19
Other	-	-	-	1	-	-	1



Question 13: How would you rate the involvement of other cluster members?

The overall average is 3.7 out of 5.

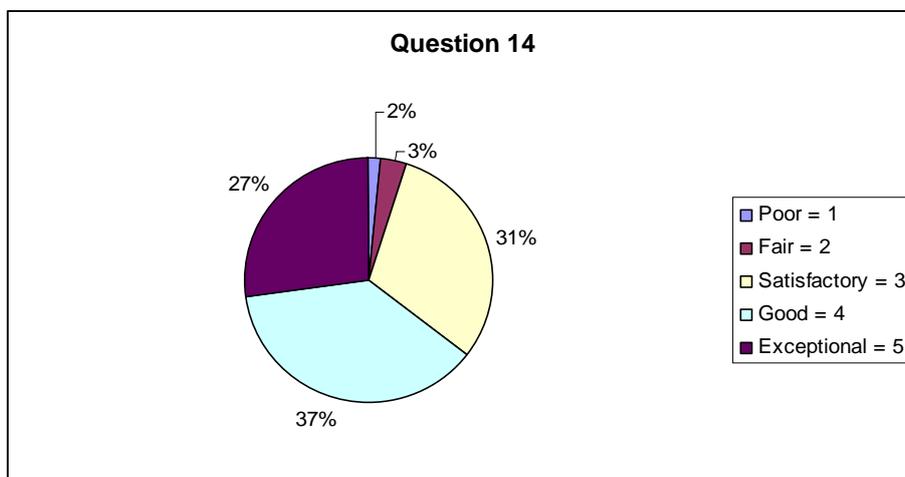
Valuation Marks	1	2	3	4	5	NA	Total
Dairy-Beef-Poultry-Animal Feed	3	1	9	5	8	-	26
Fruits and Vegetable	-	1	6	3	3	-	13
Construction Materials	-	-	6	8	5	-	19
Other	-	-	-	1	-	-	1



Question 14: How would you rate your own involvement as a cluster member?

The overall average is 3.8 out of 5.

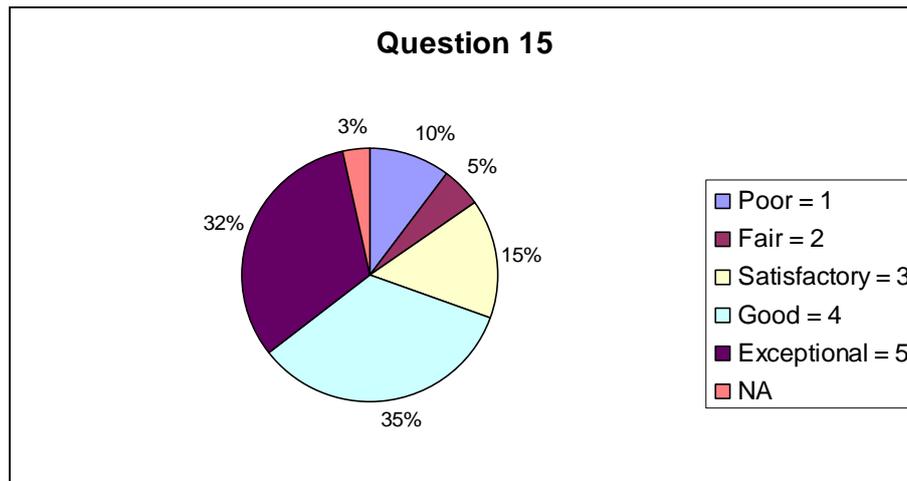
Valuation Marks	1	2	3	4	5	NA	Total
Dairy-Beef-Poultry-Animal Feed	1	2	8	6	9	-	26
Fruits and Vegetable	-	-	3	7	3	-	13
Construction Materials	-	-	7	8	4	-	19
Other	-	-	-	1	-	-	1



Question 15: How are KCBS activities having an impact in the overall business operating environment?

The overall average is 3.8 out of 5. One person marked this question as NA.

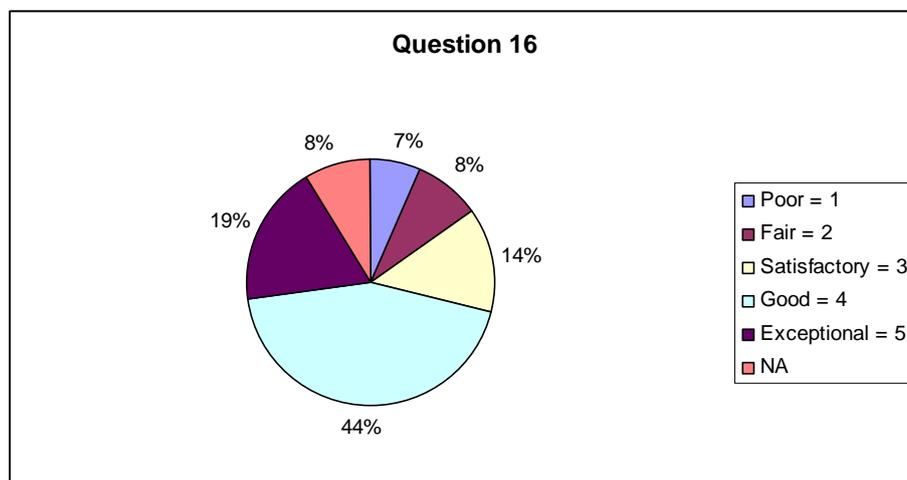
Valuation Marks	1	2	3	4	5	NA	Total
Dairy-Beef-Poultry-Animal Feed	5	1	2	9	8	1	26
Fruits and Vegetable	1	1	5	2	4	-	13
Construction Materials	-	1	2	9	6	1	19
Other	-	-	-	-	1	-	1



Question 16: How are KCBS activities having an impact in the overall competitiveness of the clusters?

The overall average is 3.6 out of 5. Five persons marked this question as NA.

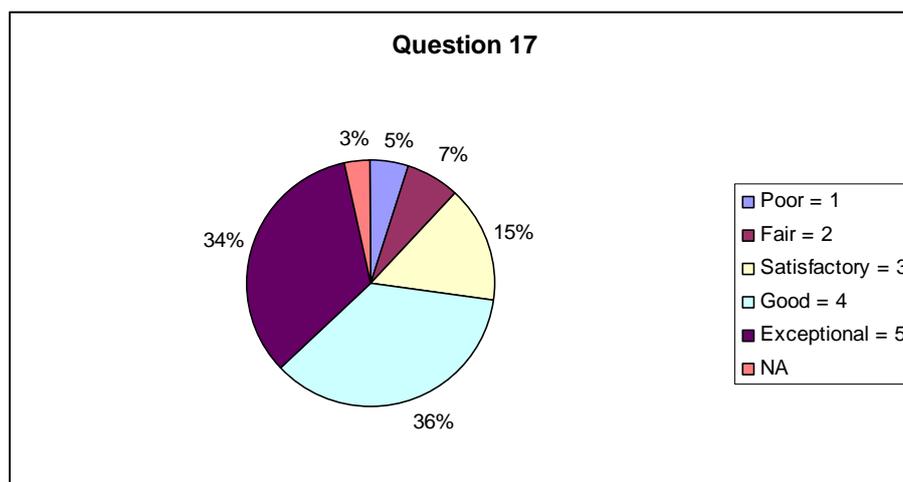
Valuation Marks	1	2	3	4	5	NA	Total
Dairy-Beef-Poultry-Animal Feed	4	3	1	11	6	1	26
Fruits and Vegetable	-	2	3	4	3	1	13
Construction Materials	-	-	4	10	2	3	19
Other	-	-	-	1	-	-	1



Question 17: Are you satisfied with the level of advisors and experts provided as support to the clusters?

The overall average is 3.9 out of 5. Two persons marked this question as NA.

Valuation Marks	1	2	3	4	5	NA	Total
Dairy-Beef-Poultry-Animal Feed	3	3	2	9	8	1	26
Fruits and Vegetable	-	-	5	6	2	-	13
Construction Materials	-	1	2	5	10	1	19
Other	-	-	-	1	-	-	1



Question 18: Do you think that KCBS staff is easily accessible to you? (Yes / No)

50 out of 59 (84%) believe that KCBS staff is easily accessible to them. Only 9 out of 59 (16%) of cluster clients surveyed believe that the KCBS staff is not easily accessible to them.

Valuation Marks	Yes	No	Total
Dairy-Beef-Poultry-Animal Feed	22	4	26
Fruits and Vegetable	13	-	13
Construction Materials	14	5	19
Other	1	-	1

Question 19: Are you in constant contact with KCBS staff regarding professional support? (Yes / No)

49 out of 59 (83%) are in constant contact with KCBS staff regarding professional support. Only 10 out of 59 (17%) of cluster clients surveyed responded "No" to this question.

Valuation Marks	Yes	No	Total
Dairy-Beef-Poultry-Animal Feed	21	5	26
Fruits and Vegetable	13	-	13
Construction Materials	15	4	19
Other	0	1	1

Question 20: Are you an active member of one of the associations created by KCBS? (Yes / No)

42 out of 59 (71%) are active members of associations created by KCBS. 15 out of 59 (26%) are not active members of associations created by KCBS. Two persons responded NA to this question.

Valuation Marks	Yes	No	NA	Total
Dairy-Beef-Poultry-Animal Feed	19	6	1	26
Fruits and Vegetable	8	5	-	13
Construction Materials	15	3	1	19
Other	-	1	-	1

Question 21: What other services and assistance do you think KCBS should provide to the business community? (Services, clusters, events, workshops, seminars, trainings)

Every comment from the surveys has been extracted and translated (if needed) without reformulating them.

CLUSTER 1 - Dairy-Beef-Poultry-Animal Feed

- Services should be offered
- Services should be offered
- Trainings, impacts on banks for loans and lower interest rate
- Information, employee trainings, advertisements and information about developments (i.e. publication of an informative magazine)
- More grants, services and trainings
- Financial services
- Trainings, seminars and financial support
- Capacity building on quality improvement of milk, assistance on communication with institution for support, improvement of fiscal policies, loans and lobbying on banks
- Support on practice (in terms of workshops), continuation of workshops and trainings, provide equal opportunity to all client members
- Organize seminars, networking with larger centers for further support, seek for more profitable cases
- More seminars, trainings and workshops
- Trainings and Services
- Continuation of seminars and trainings
- More services; Easy access to banks
- Trainings, seminars, professional assistance in milk production; Lab equipment
- Cooperation with other developed countries for sharing work experiences; Seminars; Trainings; Visits to other developed countries
- Did not receive any of the services, but will welcome any of the services
- Seminars and trainings
- Trainings
- Services of better quality, more focus on the quality of the services

- Workshops/Seminars, real-life work demonstration by experts, more practice
- More clusters, seminars, trainings, study visits to the US
- Would like to see more programs being implemented (not just words), trainings, other services, assistance in production, advise, workshops
- Not satisfied at all with the distribution of the machinery; Promises must be kept

CLUSTER 2 – Fruits and Vegetables

- Provide more and accurate information about the changes and innovations on the western markets, since we are a part of it; facilitate the participation of the clients in different fairs in different Western European countries; and support on entering the American market
- More trainings in various fields
- Trainings
- Financial assistance, trainings
- Trainings/Workshops on fruit protection themes, on marketing, assistance provided to farmers for easy market access, easy product access to the market
- More services, trainings, etc.
- Trainings, mechanisms, tools
- More frequent visits to other countries
- More educational trainings on particular problems
- Assistance with the warehouse project
- Technical assistance provided by American experts

CLUSTER 3 – Construction Materials

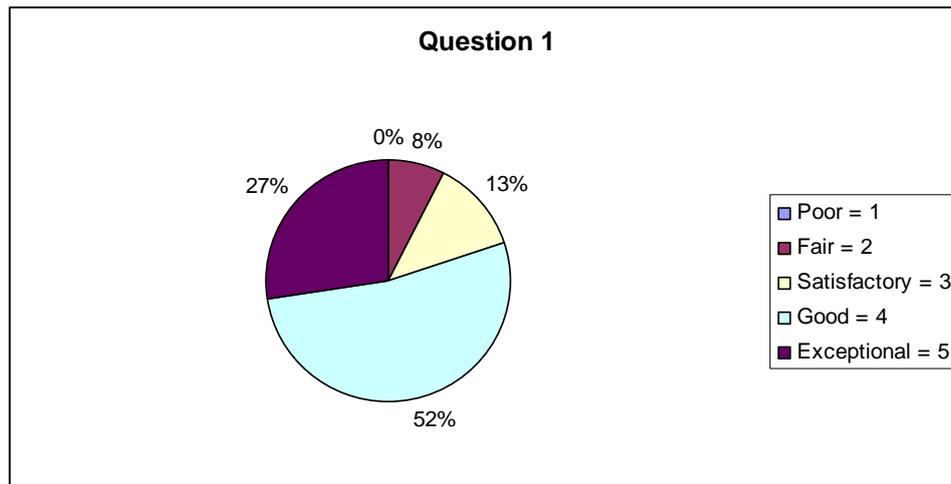
- Seminars, trainings and services
- Market research for specific products, organize visits to fairs in the region or even facilitate the participation on the fairs
- Help on creation of healthy relations with associations and institutions
- Services and construction, market; and satisfied with the seminars and trainings provided until now
- More seminars in the western countries
- Financial Assistance
- Trainings and seminars on professional advancement
- Less talk, more work
- It is necessary to visit much more international fairs, seminars and trainings
- Seminars
- Workshops/Trainings in similar foreign companies; Make the possibility of the “know-how” transfer in order to penetrate foreign markets; Most Kosovar companies are plagued by outdated technological equipment
- Modernized structure, funding.
- Seminars, trainings and services, insuring financial funds with appropriate conditions
- Join small businesses to form big corporations and provide employment opportunities, influence the institutions.
- Offer consulting services, material benefits, trainings

B. STAKEHOLDER SURVEY

Question 1: How informed are you about the KCBS program and its role?

The overall average is 4.0 out of 5.

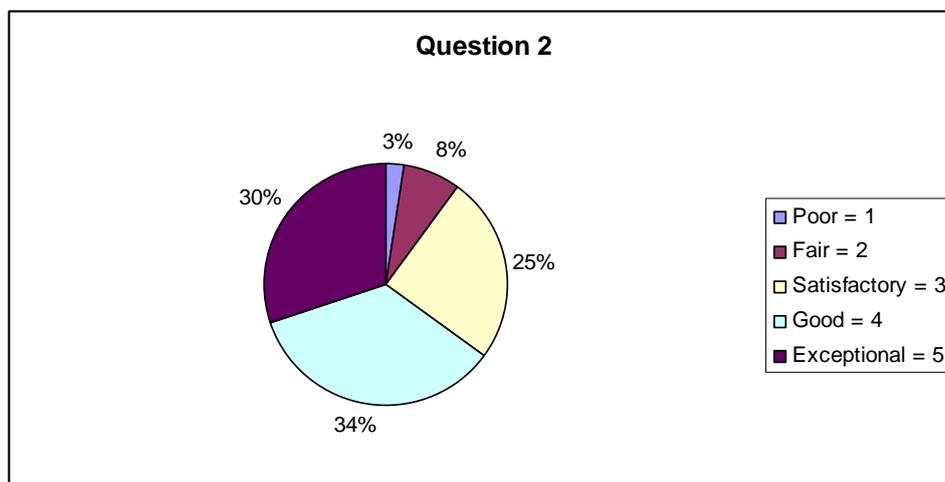
Valuation Marks	1	2	3	4	5	NA	Total
Private Sector	-	1		2	1	-	4
Public Sector	-	1	4	10	4	-	19
NGOs	-	1	1	9	6	-	17



Question 2: How would you rate the communication of the main KCBS activity?

The overall average is 3.8 out of 5.

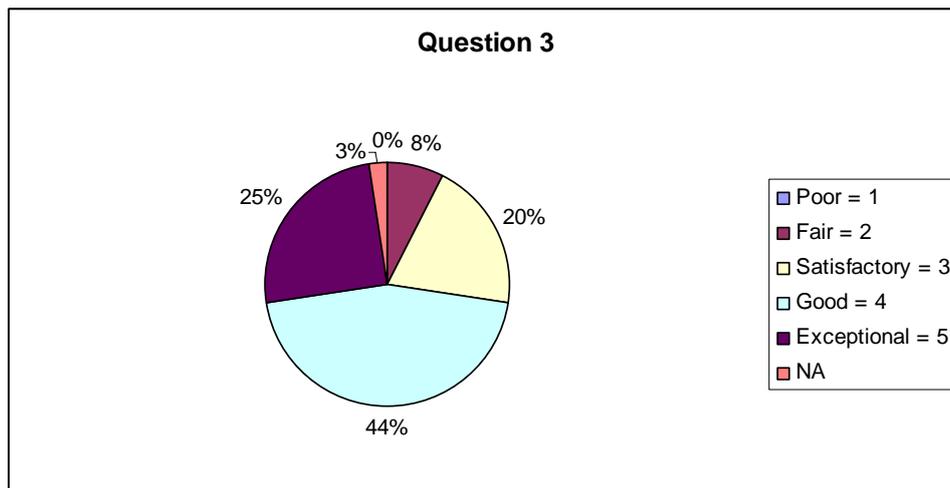
Valuation Marks	1	2	3	4	5	NA	Total
Private Sector	1	-	1	1	1	-	4
Public Sector		1	7	6	5	-	19
NGOs	-	2	2	7	6	-	17



Question 3: How would you rate KCBS's diversity of clusters?

The overall average is 3.9 out of 5. One person marked this question as NA.

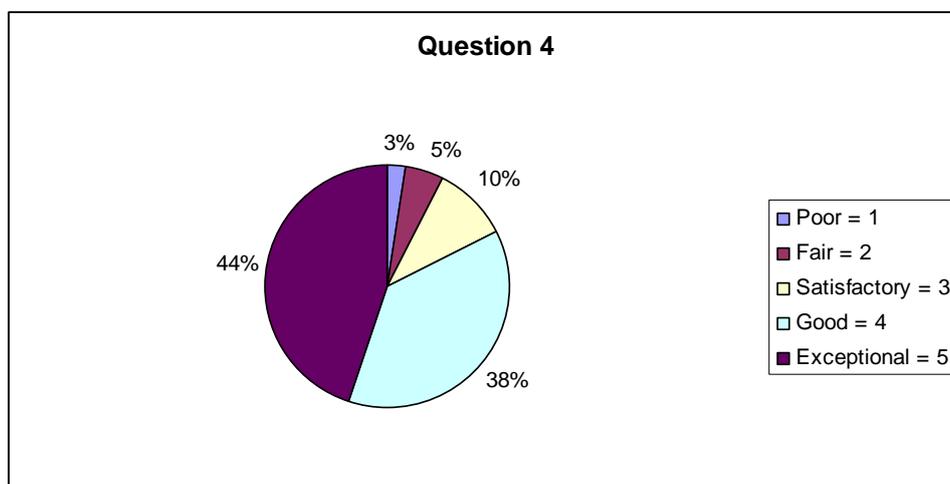
Valuation Marks	1	2	3	4	5	NA	Total
Private Sector	-		1	3	-	-	4
Public Sector	-	1	4	10	3	1	19
NGOs	-	2	3	5	7	-	17



Question 4: How satisfied are you with overall objectives of KCBS?

The overall average is 4.2 out of 5.

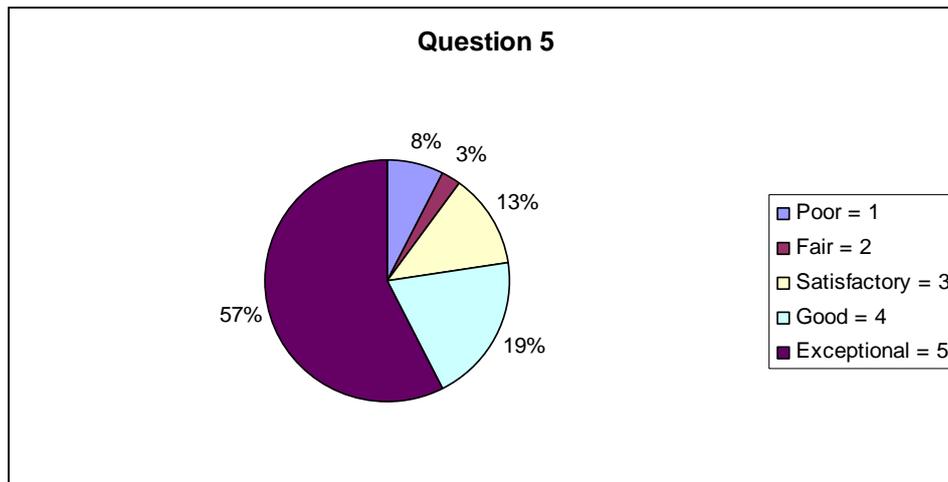
Valuation Marks	1	2	3	4	5	NA	Total
Private Sector	-	-	1	1	2	-	4
Public Sector	-	1	3	8	7	-	19
NGOs	1	1	-	6	9	-	17



Question 5: How is the communication between KCBS and your business/organization/public office?

The overall average is 4.2 out of 5.

Valuation Marks	1	2	3	4	5	NA	Total
Private Sector	1	1	-	1	1	-	4
Public Sector	1	-	3	4	11	-	19
NGOs	1	-	2	3	11	-	17



Question 6: Have you ever attended an educational seminar and/or workshop organized by KCBS? (Yes/No)

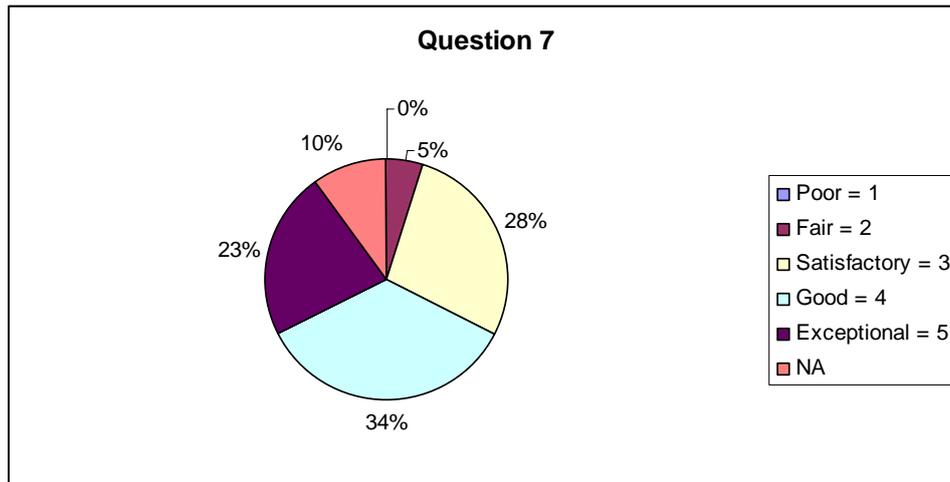
37 out of 40 (92.5%) stakeholders surveyed have attended an educational seminar and / or workshop organized by KCBS, while only 3 (7.5%) stakeholders have not.

Valuation Marks	Yes	No	Total
Private Sector	3	1	4
Public Sector	17	2	19
NGOs	17	-	17

Question 7: If yes, how would you rate the quantity of educational seminars and workshops?

The overall average is 3.8 out of 5. Four people (10%) of surveyed stakeholders marked this question as NA.

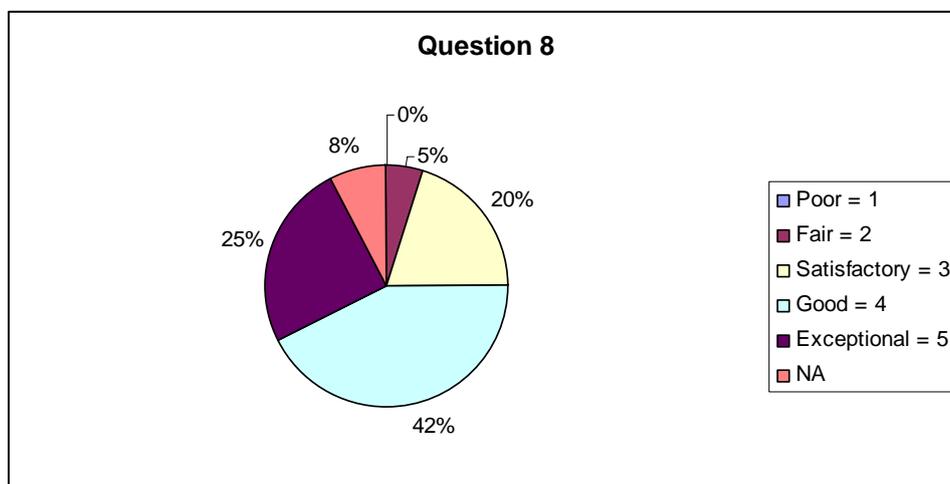
Valuation Marks	1	2	3	4	5	NA	Total
Private Sector	-		1	1	1	1	4
Public Sector	-	1	7	5	3	3	19
NGOs	-	1	3	8	5	-	17



Question 8: If yes, how would you rate the quality of educational seminars and workshops?

The overall average is 3.9 out of 5. Three people (7.5%) of surveyed stakeholders marked this question as NA.

Valuation Marks	1	2	3	4	5	NA	Total
Private Sector	-	-	1	1	1	1	4
Public Sector	-	1	5	8	3	2	19
NGOs	-	1	2	8	6	-	17



Question 9: Have you been awarded a grant or sub-contract by KCBS? (Yes / No)

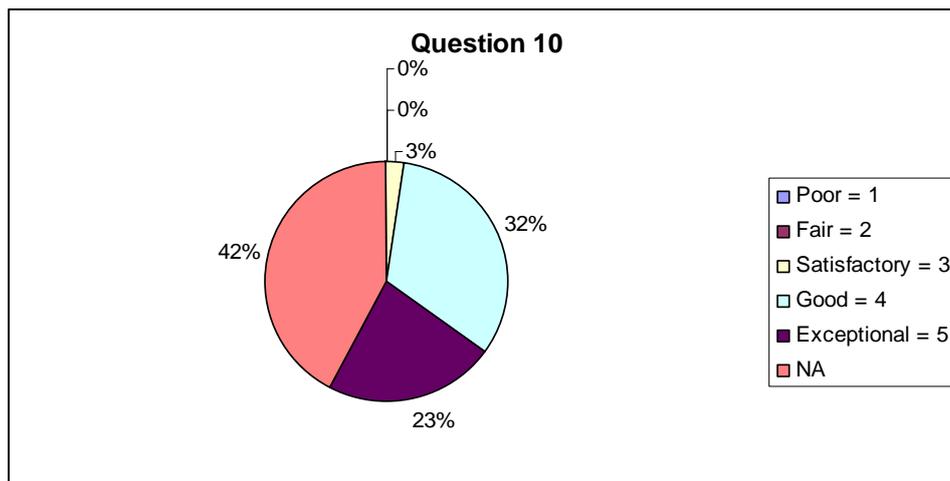
23 out of 40 (57.5%) stakeholders surveyed have been awarded a grant or sub-contract by KCBS, while only 17 (42.5%) stakeholders have not.

Valuation Marks	Yes	No	Total
Private Sector	1	3	4
Public Sector	7	12	19
NGOs	15	2	17

Question 10: If yes, how would you rate your relationship with KCBS regarding the grant or sub-contract?

The overall average is 4.3 out of 5. Seventeen people (42.5%) of surveyed stakeholders marked this question as NA.

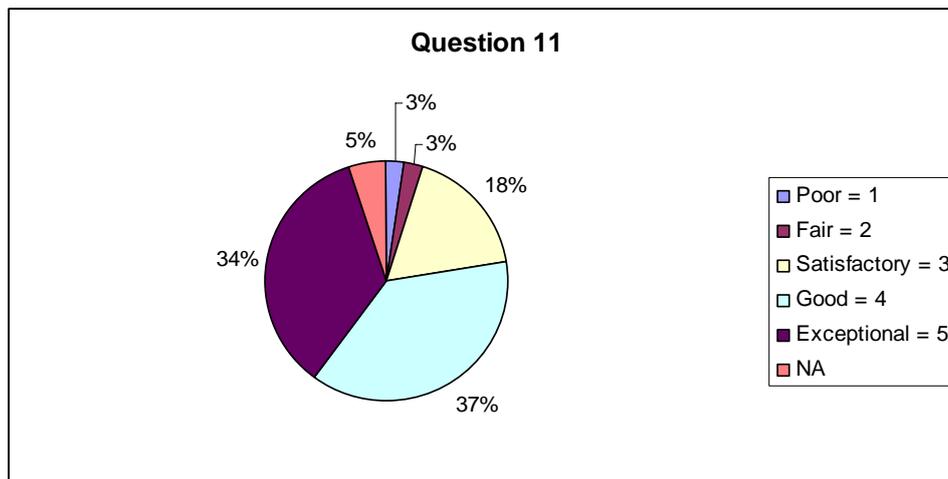
Valuation Marks	1	2	3	4	5	NA	Total
Private Sector	-	-	-	-	1	3	4
Public Sector	-	-	-	4	3	12	19
NGOs	-	-	1	9	5	2	17



Question 11: How would you rate KCBS in quality of communication?

The overall average is 4.1 out of 5. Two people (5%) of surveyed stakeholders marked this question as NA.

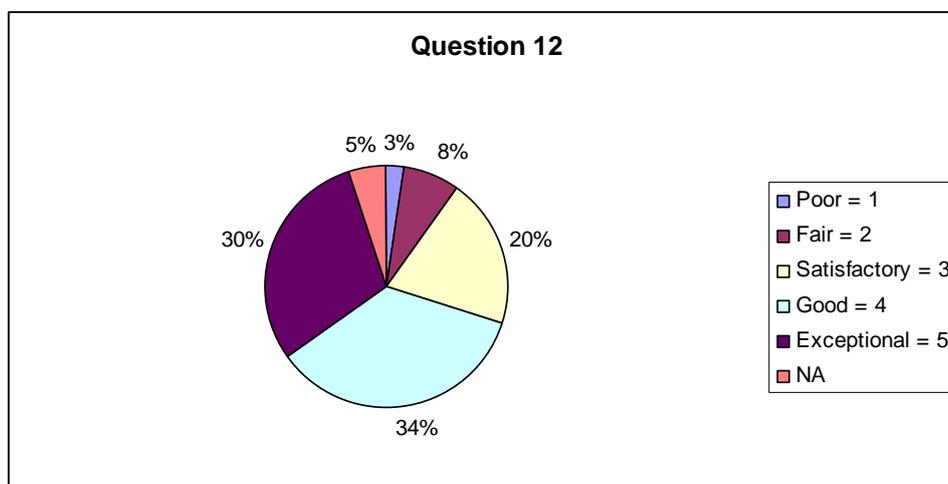
Valuation Marks	1	2	3	4	5	NA	Total
Private Sector	1	-	1	1	1	-	4
Public Sector	-	-	3	8	6	2	19
NGOs	-	1	3	6	7	-	17



Question 12: How would you rate KCBS in providing you with networking opportunities within clusters?

The overall average is 3.9 out of 5. Two people (5%) of surveyed stakeholders marked this question as NA.

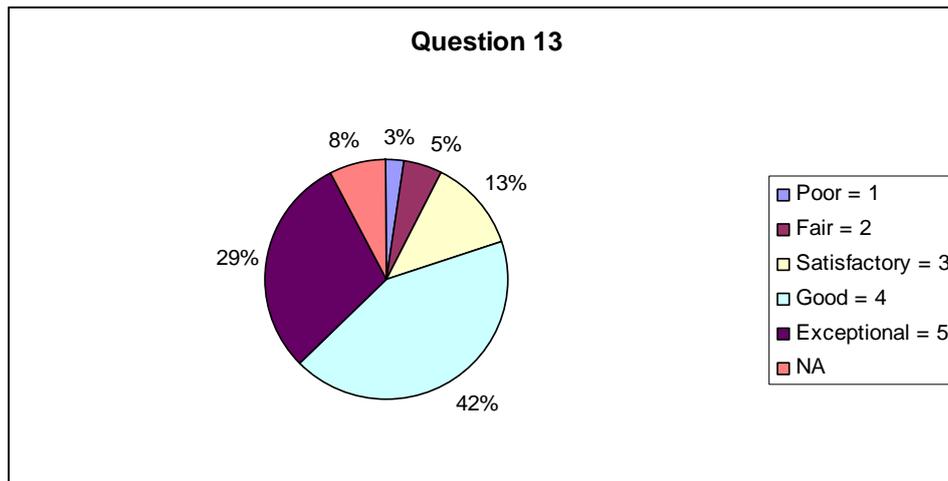
Valuation Marks	1	2	3	4	5	NA	Total
Private Sector	1	1	-	1	1	-	4
Public Sector	-	1	4	5	7	2	19
NGOs	-	1	4	8	4	-	17



Question 13: How are KCBS activities having an impact in the overall business operating environment?

The overall average is 4.0 out of 5. Three people (7.5%) of surveyed stakeholders marked this question as NA.

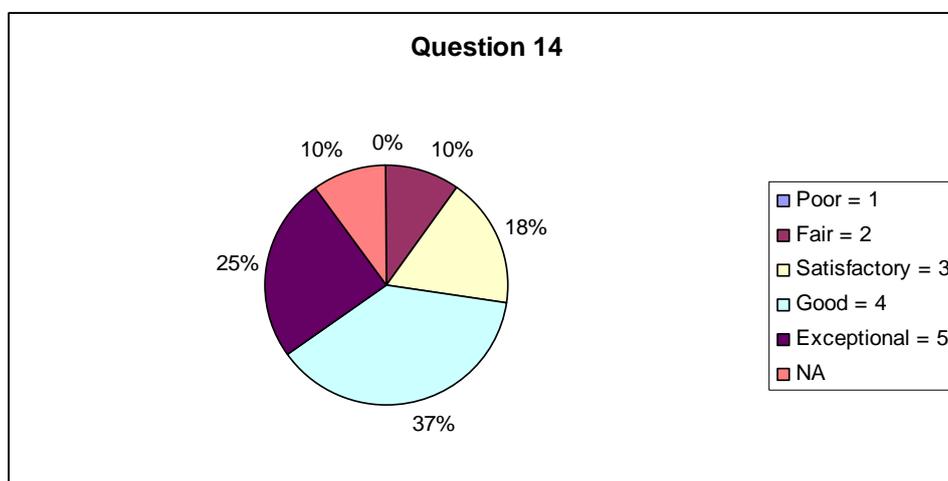
Valuation Marks	1	2	3	4	5	NA	Total
Private Sector	-	2	-	2	-	-	4
Public Sector	-	-	1	9	6	3	19
NGOs	1	-	4	6	6	-	17



Question 14: How are KCBS activities having an impact in the overall competitiveness of Kosovo Businesses?

The overall average is 3.9 out of 5. 4 people (10%) of surveyed stakeholders marked this question as NA.

Valuation Marks	1	2	3	4	5	NA	Total
Private Sector	-	2	1	1	-	-	4
Public Sector	-	-	3	8	5	3	19
NGOs	-	2	3	6	5	1	17



Question 15: Do you think that KCBS staff is easily accessible to you? (Yes / No)

36 out of 40 (90%) stakeholders surveyed think that KCBS staff is easily accessible to them, while only 3 (7.5%) stakeholders believe they are not. One person marked this question as NA.

Valuation Marks	Yes	No	NA	Total
Private Sector	4	-	-	4
Public Sector	18	-	1	19
NGOs	14	3	-	17

Question 16: Are you in constant contact with KCBS staff regarding mutual goals? (Yes / No)

33 out of 40 (82.5%) stakeholders surveyed are in constant contact with KCBS staff regarding mutual goals, while only 6 (15%) stakeholders are not. One person marked this question as NA.

Valuation Marks	Yes	No	NA	Total
Private Sector	2	2	-	4
Public Sector	16	2	1	19
NGOs	15	2	-	17

Question 17: Are you aware of the advisors and experts provided by KCBS to local business and as support to the clusters?

34 out of 40 (85%) stakeholders surveyed are aware of the advisors and experts provided by KCBS to local businesses as support to the clusters, while only 5 (12.5%) stakeholders are not aware. One person marked this question as NA.

Valuation Marks	Yes	No	NA	Total
Private Sector	3	1		4
Public Sector	16	2	1	19
NGOs	15	2		17

Question 18: What other services and assistance do you think KCBS should provide to the business community? (Services, clusters, events, workshops, seminars, trainings)

Every comment from the surveys has been extracted and translated (if needed) without reformulating them.

PRIVATE SECTOR:

- Join small businesses to form big corporations and provide employment opportunities, influence the institutions.
- Dissatisfied with the clusters, no promises were met, no financial support was offered on testing fields, misdistribution of machinery.
- KCBS should aim banking as well.

- KCBS can help by organizing more seminars, trainings, and offering services; financial support with favorable conditions
- Direct trainings to the businesses and producers, especially on the production and processing of milk; consulting services on increasing effectiveness of businesses and production; future focus on service offerings for businesses.
- Assistance in the formation of sector specific credit institutions; continue our cooperation; strategy for increasing competitiveness of domestic food industry; organize B2B meetings, Cost sharing for events; seminars for expert standards of fresh and process products.

PUBLIC SECTOR:

- SME funds, focus on Municipalities, Tax Reform, VAT compliances, training in financial reporting, Events: 1 x year – spring SME; 4x Kosova Financial Markets Forum (Banking)
- Technical assistance by experienced international consultants.
- Services
- Trainings
- More grants and seminars. Facilitate the export of local products
- Trainings, seminars, services, donations for first line manager trainings.
- Direct grant support and capacity building.
- Professional staff training, certification of individuals by an individual certifying body.
- Direct facilitation of projects that would be certified
- In order to declare for their offers, we need complete information. These did not help our institution directly because of being a public institution.
- Assists local staff to become consultants rather than project employees.
- Consulting combined with financial assistance
- Trainings, seminars and workshops
- More grants on growth of groves
- Service, clusters, workshops, trainings and assistance on loans
- KCBS support on the achievement of Rural and Agricultural Development Plan's objectives for the period of 2007-2013
- Assistance in the formulation of sector specific credit institutions; continue our cooperation.

NGOS:

- Professional trainings and services
- More actors from different sectors should be involved, focus should be on other sectors rather than agriculture; more services and technical assistance
- Seminars for ISO 9000 standards should be organized
- Coordination and clarity of structures and activities should be improved
- KCBS should focus on assistance to individual farmers through grants in order to develop the agriculture
- Continuation of services and assistance on lobbying
- Bring individuals to Kosovo that have an impact or influence, and mainly in politics

- Stop working with associations that are not self sustainable
- Services and workshops
- Grants and services
- Services, grants and trainings
- Market researches and creation of industry databases
- Services, Seminars and Trainings
- More assistance on combined American and local experience
- KCBS provides the opportunity for every kind of assistance to the business community if it is ready to ask for it
- More workshops, seminars, and trainings.

CONCLUSIONS AND RECOMMENDATIONS FOR FUTURE ACTIVITY

A. FROM CLUSTER CLIENT SURVEY

CONCLUSIONS	RECOMMENDATIONS
An overall rating of communicating KCBS's role and activities is 4.0 out of 5.	KCBS should strive to reach every business belonging in the cluster sectors and provide them with information regarding services which KCBS can provide to them.
The majority of cluster clients surveyed believe that KCBS staff does a good job in helping them expand their operations, with an overall rating of 3.75 out of 5.	KCBS should communicate clearly to all cluster clients their possible level of involvement in helping their cluster members expand their operations.
Cluster clients surveyed marked the KCBS overall help and the customer service and responsiveness as 3.7 out of 5.	KCBS should compile and sign an SLA – Service Level Agreement with all cluster clients. This agreement would clarify the expected level of customer satisfaction and responsiveness that can be expected of KCBS staff.
The quantity of educational seminars and workshops is rated 3.7 out of 5 by the surveyed cluster clients.	KCBS should conduct a needs analysis with all cluster clients. This will help when compiling the yearly plan for educational seminars and workshops.
The quality of educational seminars and workshops is rated 4.2 out of 5 by the surveyed cluster clients.	KCBS should require that all attendees of educational seminars and workshops, complete an assessment form where the knowledge of the trainer, the quality of material and the level of interaction is rated.
Low number of surveyed cluster clients has been awarded a grant or sub-contract by KCBS. However, the relationship with the clients who have been awarded a grand or sub-contract is rated 4.3 out of 5.	KCBS should continue to provide grants or other means of financial support (i.e.: through the voucher scheme) to cluster clients.
Involvement of other cluster clients in KCBS is rated 3.7 out of 5 by the surveyed cluster clients.	KCBS should stress the importance of involvement of cluster clients in KCBS. This can be done with BTL (below the line) marketing by highlighting the benefits of involvement.
Surveyed cluster clients believe that KCBS has managed to influence the competitiveness of clusters, and rated this question as 3.6 out of 5.	KCBS should take a more active role in helping the cluster clients lobby for a more favorable market, according to suggestions provided by the clients.

Overall, cluster clients are satisfied with the level of advisors and experts provided by KCBS and rate this question at 3.9 out of 5.	KCBS should continue with providing cluster clients with experts and advisors.
83% of surveyed clients believe that KCBS staff is easily accessible for professional help. Furthermore, these clients are in constant contact with KCBS staff.	KCBS should make more effort to include all cluster clients when offering professional help. This may be done with a weekly or monthly newsletter where KCBS services would be explained and offered to all cluster clients.
Not all cluster clients (26%) surveyed belonged to an association created by KCBS.	KCBS should stress the importance of belonging to an association which supports and lobbies for the cluster sectors. This would help in networking, lobbying as well as association self-sustainability.
Surveyed cluster clients suggested many methods in increasing KCBS's involvement in clusters.	KCBS should take into an account all suggestions, which mainly have to do with the increase of service diversity, and incorporate them in their yearly plan, and seek necessary funding from USAID in order to support cluster client requests.

B. FROM STAKEHOLDER SURVEY

CONCLUSIONS	RECOMMENDATIONS
An overall rating of communicating KCBS's role is ranked at 4.0 out of 5, while the communication of activities is rated at 3.8 out of 5 by surveyed stakeholders.	KCBS should strive to communicate its activities and role to the stakeholders.
Surveyed stakeholders consider the diversity of clusters as 3.9 out of 5.	KCBS should research the possibility of including other clusters in its program.
Surveyed stakeholders consider the communication between KCBS and their organization/business or public office as 4.2 out of 5.	
While the attendance in seminars/workshops of surveyed stakeholders is at 93%, the quality and quantity of seminars/workshops is considered 3.8 out of 5.	KCBS should implement better quality control mechanism, such as an assessment form, when implementing seminars/workshops.
57% of surveyed stakeholders did receive a grant or sub-contract from KCBS. Furthermore they rate their relationship with KCBS at 4.3 out of 5.	
Surveyed stakeholders consider the impact of KCBS rated as 3.9 out of 5 in the overall business operating environment and the competitiveness of Kosovo businesses.	KCBS should promote their achievements to the stakeholders.

<p>The majority of the stakeholders (86.4%) believe that KCBS staff is easily accessible.</p>	
<p>90% of surveyed stakeholders are in constant contact with KCBS staff regarding mutual goals.</p>	<p>KCBS should promote to all stakeholders their goals and invite them in pursuing their mutual goals.</p>
<p>85% of surveyed stakeholders are aware of the advisors and experts provided by KCBS.</p>	<p>In order to inform the other 14% of stakeholder, KCBS should implement a weekly or monthly newsletter where KCBS services would be explained.</p>
<p>Surveyed stakeholders suggested many methods in improving/diversifying KCBS's involvement in the business community.</p>	<p>KCBS should take into an account all suggestions, which mainly have to do with the increase of service diversity, and incorporate them in their yearly plan.</p>

ANNEXES

Annex I Cluster Client Survey

Annex II Stakeholder Survey

Annex I – Cluster Client survey



Stakeholder Satisfaction Survey. A USAID-funded project and managed by KCBS.

Research implemented by:



Management & Development Associates (Prishtina, Kosovo)
...next generation business strategies & solutions

Dear KCBS client: This questionnaire is part of a research project, financed by USAID and managed by KCBS, which will help us understand your perceptions regarding the quality and importance of services rendered to you from KCBS. Your answers will help us improve these services. Please take few minutes of your time and answer these questions. **THANK YOU!** Driton Dalipi, Market Research Expert

NOTE: Target groups are all KCBS cluster beneficiaries (constituting 60% of total sample). The cluster beneficiaries are divided proportionally. We have made an attempt to cover the whole region of Kosovo in order to get more qualitative data. Ethnicity as well was taken into an account. Businesses will be divided in Small and Medium size businesses.

▼ ▼ ▼ CLUSTER CLIENT SURVEY ▼ ▼ ▼

Begin survey here...

First & Last Name:	Telephone:
Address:	Nr. of workers:
Name of Business:	Circle cluster: 1 2 3

Clusters: Dairy-Beef-Poultry-Animal Feed = 1; Fruits and Vegetable = 2; Construction Materials = 3

continue survey on the other side...

NOTE: Poor = 1 | Fair = 2 | Satisfactory = 3 | Good = 4 | Exceptional = 5

1 2 3 4 5

1	How informed are you about the KCBS program and it's role?	<input type="checkbox"/>				
2	How would you rate the communication of the main KCBS activity?	<input type="checkbox"/>				
3	How would you rate KCBS's staff involvement in helping you expand or start a new venture?	<input type="checkbox"/>				
4	How satisfied are you overall with the help you have received from KCBS?	<input type="checkbox"/>				
5	How would you rate customer service and responsiveness at KCBS?	<input type="checkbox"/>				
6	Have you ever Attended an educational seminar and/or workshop organized by KCBS?	Yes	No			
7	If yes, how would you rate the quantity of educational seminars and workshops?	<input type="checkbox"/>				
8	If yes, how would you rate the quality of educational seminars and workshops?	<input type="checkbox"/>				
9	Have you been awarded a grant or sub-contract by KCBS?	Yes	No			
10	If yes, how would you rate your relationship with KCBS regarding the grant or sub-contract?	<input type="checkbox"/>				
11	How would you rate KCBS in quality of communication?	<input type="checkbox"/>				
12	How would you rate KCBS in providing you with networking opportunities within clusters?	<input type="checkbox"/>				
13	How would you rate the involvement of other cluster members?	<input type="checkbox"/>				
14	How would you rate your own involvement as a cluster member?	<input type="checkbox"/>				
15	How are KCBS activities having an impact in the overall business operating environment?	<input type="checkbox"/>				
16	How are KCBS activities having an impact in the overall competitiveness of the clusters?	<input type="checkbox"/>				
17	Are you satisfied with the level of advisors and experts provided as support to the clusters?	<input type="checkbox"/>				
18	Do you think that KCBS staff is easily accessible to you?	Yes	No			
19	Are you in constant contact with KCBS staff regarding professional support?	Yes	No			
20	Are you an active member of one of the associations created by KCBS?	Yes	No			
21	What other services and assistance do you think KCBS should provide to the business community? (services, clusters, events, workshops, seminars, trainings)					

Annex II – Stakeholder survey



Stakeholder Satisfaction Survey. A USAID-funded project and managed by KCBS.

Research implemented by:



Management & Development Associates (Prishtina, Kosovo)
...next generation business strategies & solutions

Dear KCBS client: This questionnaire is part of a research project, financed by USAID and managed by KCBS, which will help us understand your perceptions regarding the quality and importance of services rendered to you from KCBS. Your answers will help us improve these services. Please take few minutes of your time and answer these questions. **THANK YOU!** Driton Dalipi, Market Research Expert

NOTE: Target groups are all KCBS stakeholders (constituting 40% of total sample). The stakeholders are divided in the following sectors: private, public and NGO. Quantity is proportionally divided. We have made an attempt to cover all necessary ministries, key foreign offices and NGO's whose vision coincides with KCBS's overall objective.

▼ ▼ ▼ STAKEHOLDER SURVEY ▼ ▼ ▼

Begin survey here...

First & Last Name:	Telephone:			
Address:	Job Title:			
Institution:	Circle sector:	1	2	3

Sector: Private = 1; Public = 2; NGO = 3

continue survey on the other side...

NOTE: Poor = 1 | Fair = 2 | Satisfactory = 3 | Good = 4 | Exceptional = 5

1	2	3	4	5
----------	----------	----------	----------	----------

1 How informed are you about the KCBS program and it's role?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 How would you rate the communication of the main KCBS activity?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 How would you rate KCBS's diversity of clusters?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4 How satisfied are you with overall objectives of KCBS?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 How is the communication between KCBS and your business/organization/public office?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6 Have you ever attended an educational seminar and/or workshop organized by KCBS?	<input type="checkbox"/> Yes	<input type="checkbox"/> No			
7 If yes, how would you rate the quantity of educational seminars and workshops?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8 If yes, how would you rate the quality of educational seminars and workshops?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9 Have you been awarded a grant or sub-contract by KCBS?	<input type="checkbox"/> Yes	<input type="checkbox"/> No			
10 If yes, how would you rate your relationship with KCBS regarding the grant or sub-contract?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11 How would you rate KCBS in quality of communication?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12 How would you rate KCBS in providing you with networking opportunities within clusters?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13 How are KCBS activities having an impact in the overall business operating environment?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14 How are KCBS activities having an impact in the overall competitiveness of Kosovo Businesses?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15 Do you think that KCBS staff is easily accessible to you?	<input type="checkbox"/> Yes	<input type="checkbox"/> No			
16 Are you in constant contact with KCBS staff regarding mutual goals?	<input type="checkbox"/> Yes	<input type="checkbox"/> No			
17 Are you aware of the advisors and experts provided by KCBS to local business and as support to the clusters?	<input type="checkbox"/> Yes	<input type="checkbox"/> No			
18 What other services and assistance do you think KCBS should provide to the business community? (services, clusters, events, workshops, seminars, trainings)					