



Country Opinion Surveys

# *Country Opinion Survey Benchmarks and Insights – FY25*

ECR Business Intelligence Team

# Research Areas

1. Overall Views
2. Reforms and Processes
3. Stakeholder Needs
4. Partnerships
5. Insights for Communications

The goal of the COS program is to survey all client countries across a 3-year cycle

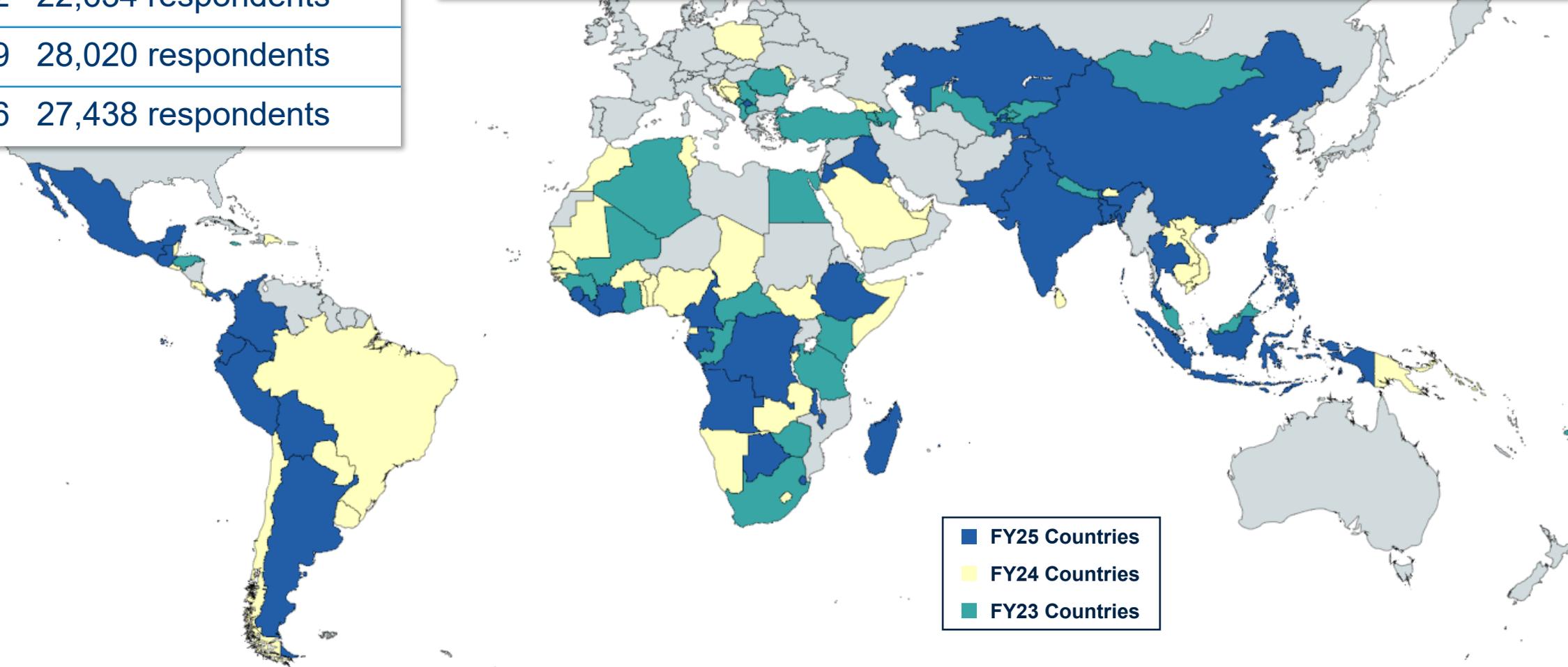
**FY23-25 26,797 respondents**

FY20-22 22,634 respondents

FY17-19 28,020 respondents

FY14-16 27,438 respondents

FY25 Countries							
Angola	China	Eswatini	India	Kiribati	Mauritius	Philippines	Sint Maarten
Argentina	Colombia	Ethiopia	Indonesia	Kosovo	Mexico	Rwanda	Tajikistan
Bangladesh	Cote d'Ivoire	Gabon	Iraq	Liberia	Pakistan	Saint Lucia	Thailand
Bolivia	Democratic	Grenada	Jordan	Madagascar	Panama	Samoa	Timor-Leste
Botswana	Republic of Congo	Guatemala	Kazakhstan	Malawi	Peru	Sierra Leone	Tonga
Cameroon	Ecuador						



■ FY25 Countries  
■ FY24 Countries  
■ FY23 Countries

Although the goal is to survey countries every three years, the decision whether or not to survey a country is made by the country team in consideration of country context and the utilization of COS data in strategic documents.

# Methodology

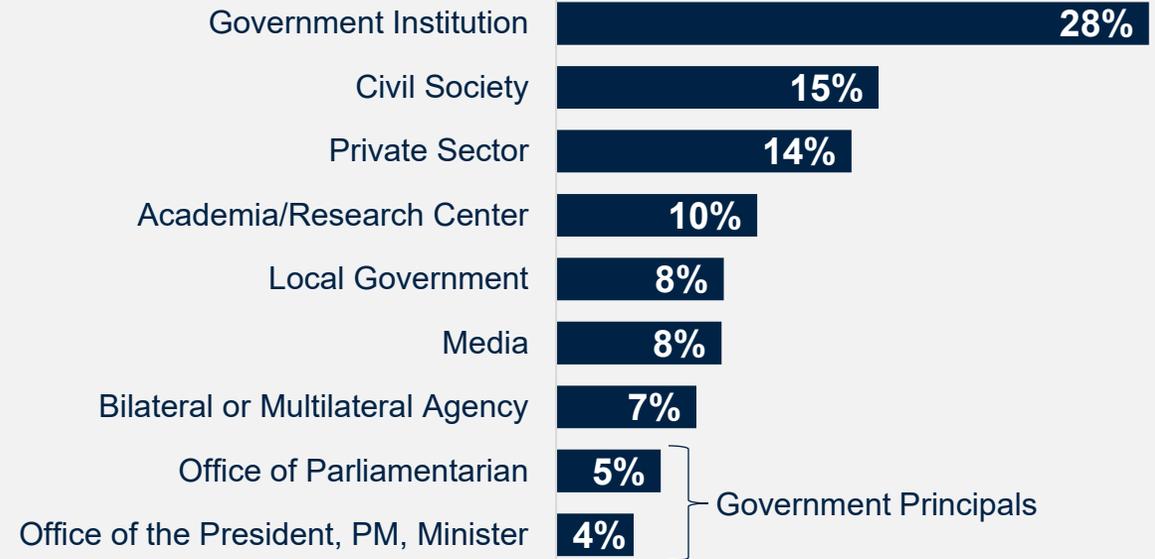
## Surveys fielded between July 2024 and June 2025 (most countries collected data in FY25 Q3 and Q4)

- Lists of potential participants provided by WBG Country teams and supplemented by fielding agencies
- Fielding managed by independent agencies
- 20 of 41 countries were IDA-eligible

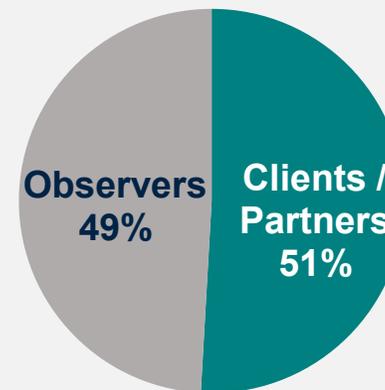
### FY25 COS data compared to past years



### Stakeholders in FY25 sample



### Audiences in FY25 sample



#### Clients / Partners include:

- All government principals
- Any stakeholders who collaborate with the WBG



What is your primary professional affiliation? (Select only 1 response) (Percentage of Respondents, N=10,694)  
In the past 3 years, have you worked or collaborated with the World Bank Group (WBG) in your country? (N=10,703)

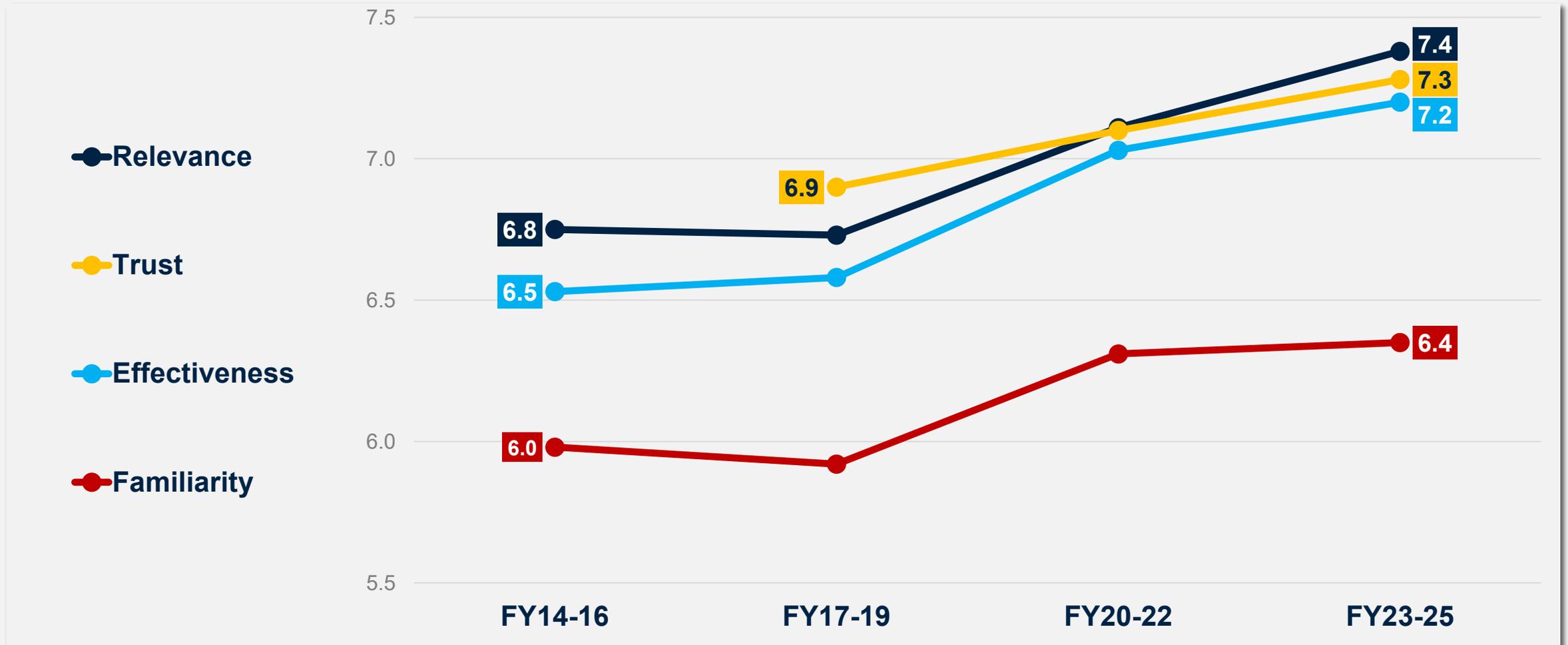
# ***Overall Views***

*Trust, relevance, effectiveness, and familiarity*



# Key Performance Indicators – Across COS Global Cycles

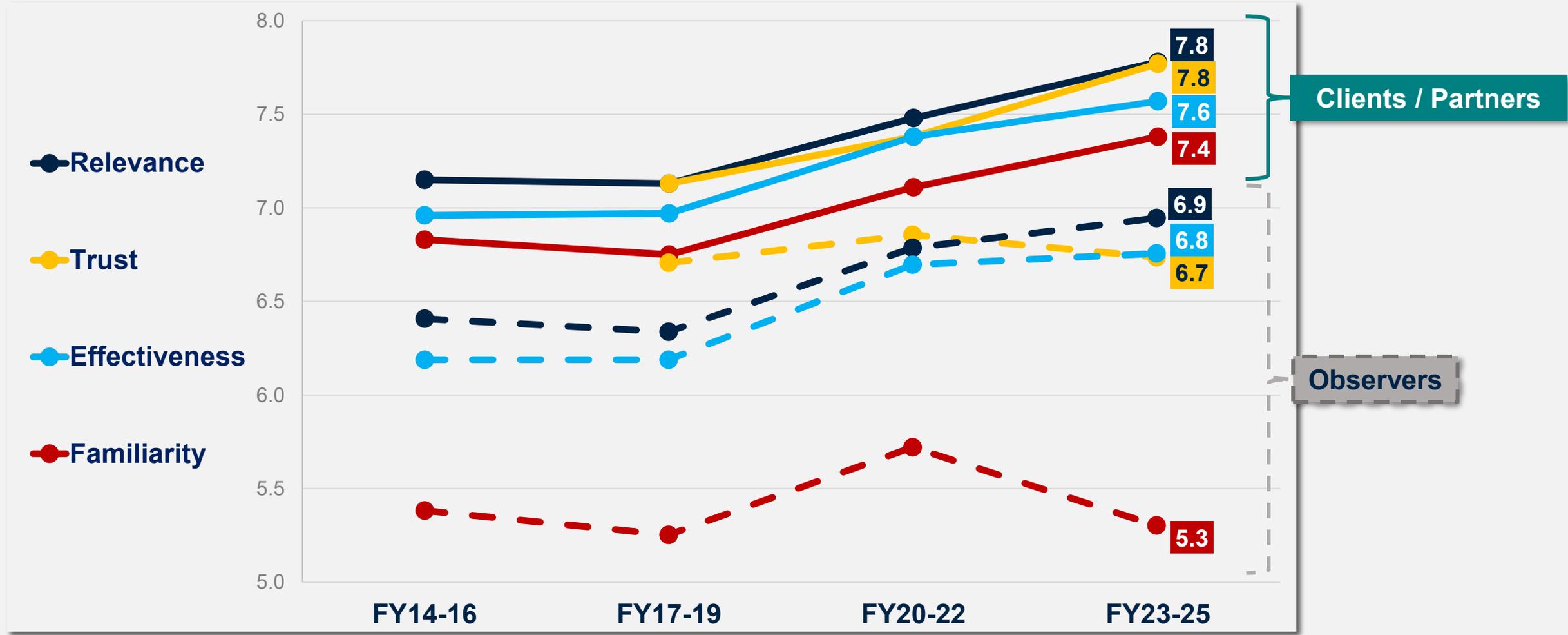
*WBG Relevance, Trust, and Effectiveness are increasingly positive.*



How much do you trust the WBG to do what is right for your country? Scale: 1 No at all – 10 Very much  
How relevant is the WBG to your country's development? Scale: 1 No at all – 10 Very much  
How effective is the WBG in helping your country achieve development results? Scale: 1 No at all – 10 Very much  
How familiar are you with the WBG's work in your country? Scale: 1 Not familiar at all – 10 Very familiar

# Key Performance Indicators – Audience Breakdown

Among clients/partners, *Trust, Relevance, Effectiveness, and Familiarity* show steady growth. Among observers, *Familiarity and Trust* have declined, *Relevance and Effectiveness* increased.



How much do you trust the WBG to do what is right for your country? Scale: 1 No at all – 10 Very much  
 How relevant is the WBG to your country's development? Scale: 1 No at all – 10 Very much  
 How effective is the WBG in helping your country achieve development results? Scale: 1 No at all – 10 Very much  
 How familiar are you with the WBG's work in your country? Scale: 1 Not familiar at all – 10 Very familiar

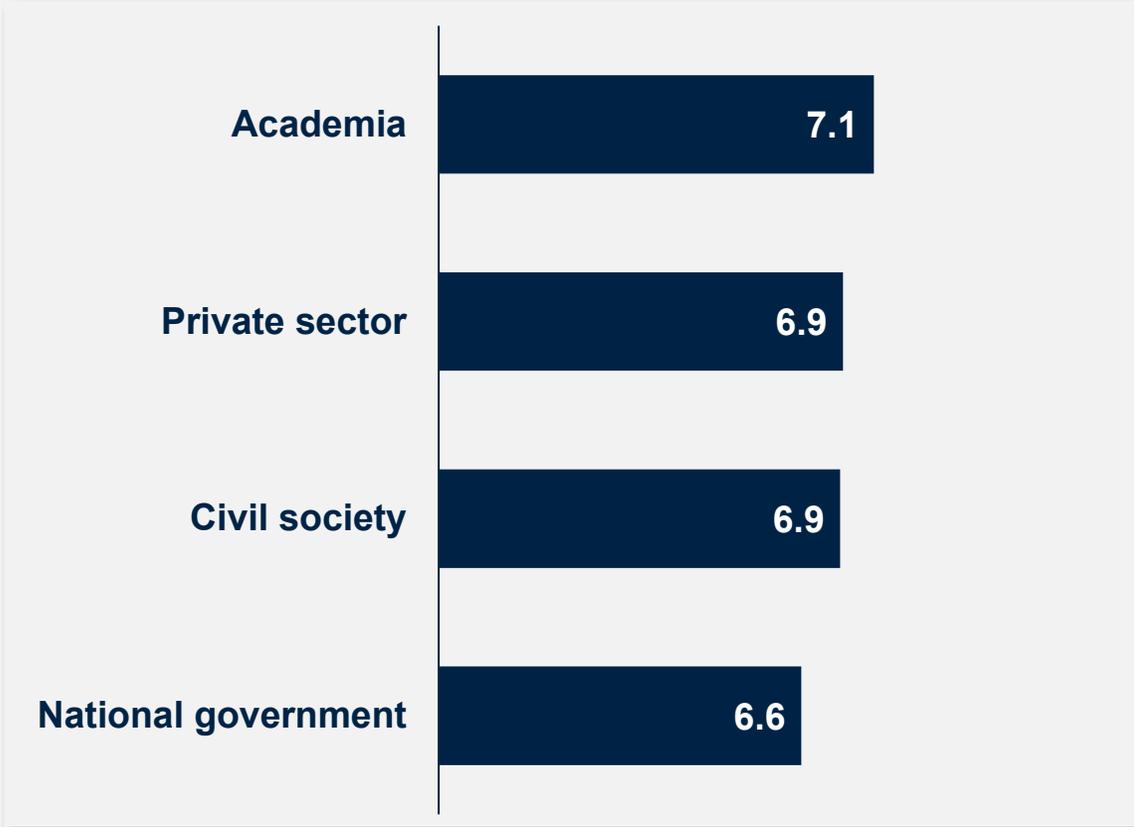
# FY25 Trust Benchmarks

The WBG and UN agencies were ranked as the *most trusted* institutions within client countries, while the IMF and national governments were the *least trusted*.

## Multinational Institutions



## In-Country Institutions



How much do you trust each of the following institutions to do what is right for your country? Scale: 1 No at all – 10 Very much.

# FY25 Relevance and Effectiveness Benchmarks

The WBG is rated the highest in *Relevance* and *Effectiveness* in client countries compared to other multinational institutions but is closely followed by the UN.

## Relevance



## Effectiveness



How relevant is each of the following organizations to your country's development? Scale: 1 No at all – 10 Very much  
How effective is each of the following organizations in helping your country achieve development results? Scale: 1 No at all – 10 Very much

# ***Perceptions of Reforms and Processes***

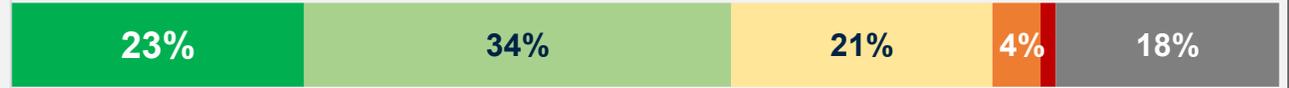
*WBG and client country reforms*



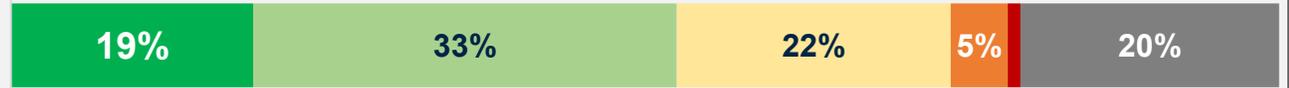
# Perceptions of Bank Reforms: Processes

*“Based on your experience, in the past two years, how has the WBG changed in terms of...”*

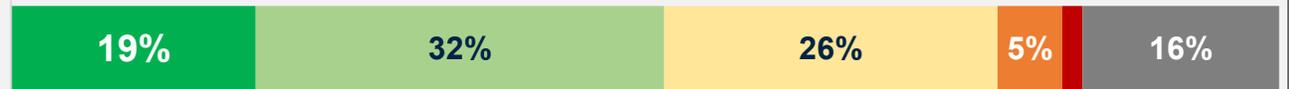
Improving the technical quality of WBG-supported projects in your country



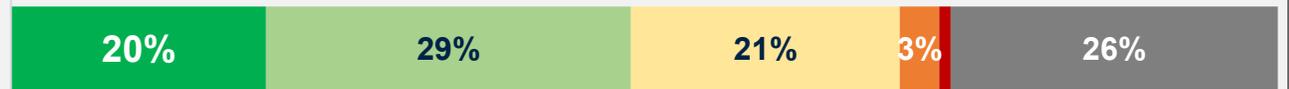
Partnering with others to increase development finance



Being easy to work with



Working across its institutions as one World Bank Group



The speed of WBG project approval



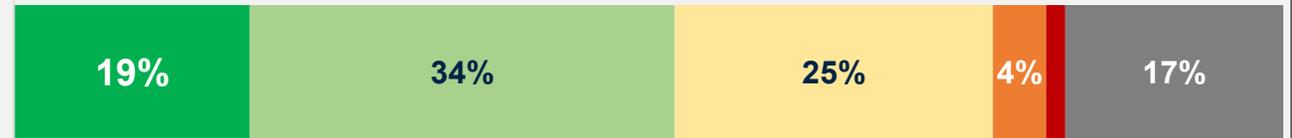
■ Became significantly better ■ Became somewhat better ■ Stayed the same ■ Became somewhat worse ■ Became significantly worse ■ Don't know

Based on your experience, in the past two years, how has the WBG changed in terms of...  
 Scale: 1 Become significantly worse – 5 Became significantly better (Percentage of Respondents)  
 Questions were asked to respondents from government and bilateral/multilateral agencies and those from other stakeholder groups that said they collaborated with the WBG.

# Perceptions of Bank Reforms: Outcomes

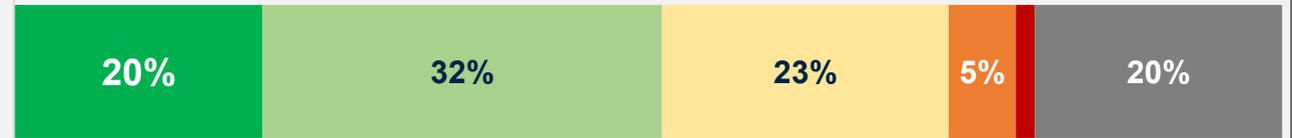
“Based on your experience, in the past two years, how has the WBG changed in terms of...”

Its work to improve people’s lives in your country

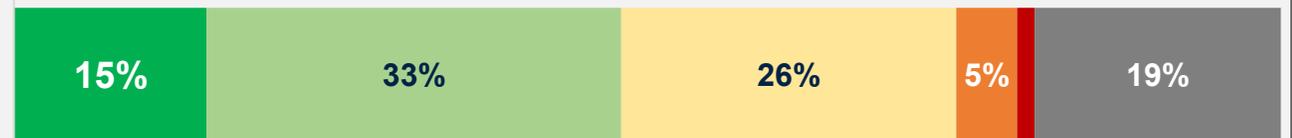


Creating new investment opportunities in your country

*(asked only to government and private sector respondents)*



Its work to improve the overall business environment in your country

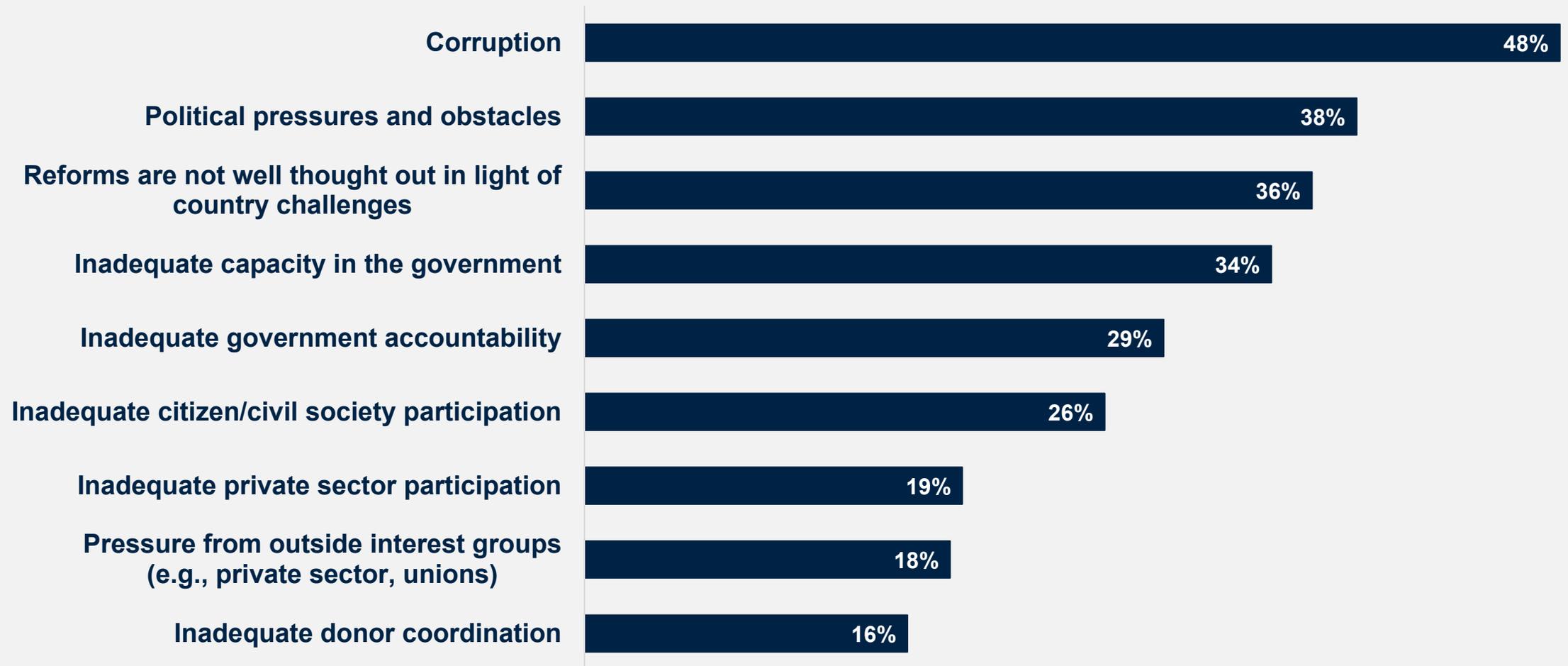


■ Became significantly better ■ Became somewhat better ■ Stayed the same ■ Became somewhat worse ■ Became significantly worse ■ Don't know

Based on your experience, in the past two years, how has the WBG changed in terms of...  
 Scale: 1 Become significantly worse – 5 Became significantly better (Percentage of Respondents)  
 Asked to all respondents unless noted.

# Perceived Obstacles to Reforms

Nearly half of all stakeholders felt that *Corruption* was to blame for slow or failed reform efforts, followed by *Political pressures/obstacles* in the country.



When economic and/or social reform efforts fail or are slow to take place in your country which of the following would you attribute this to? (Select up to 3) (Only asked in 9 countries in FY25, Percentage of Respondents, N=1,936)

# Perceived Obstacles to Reforms

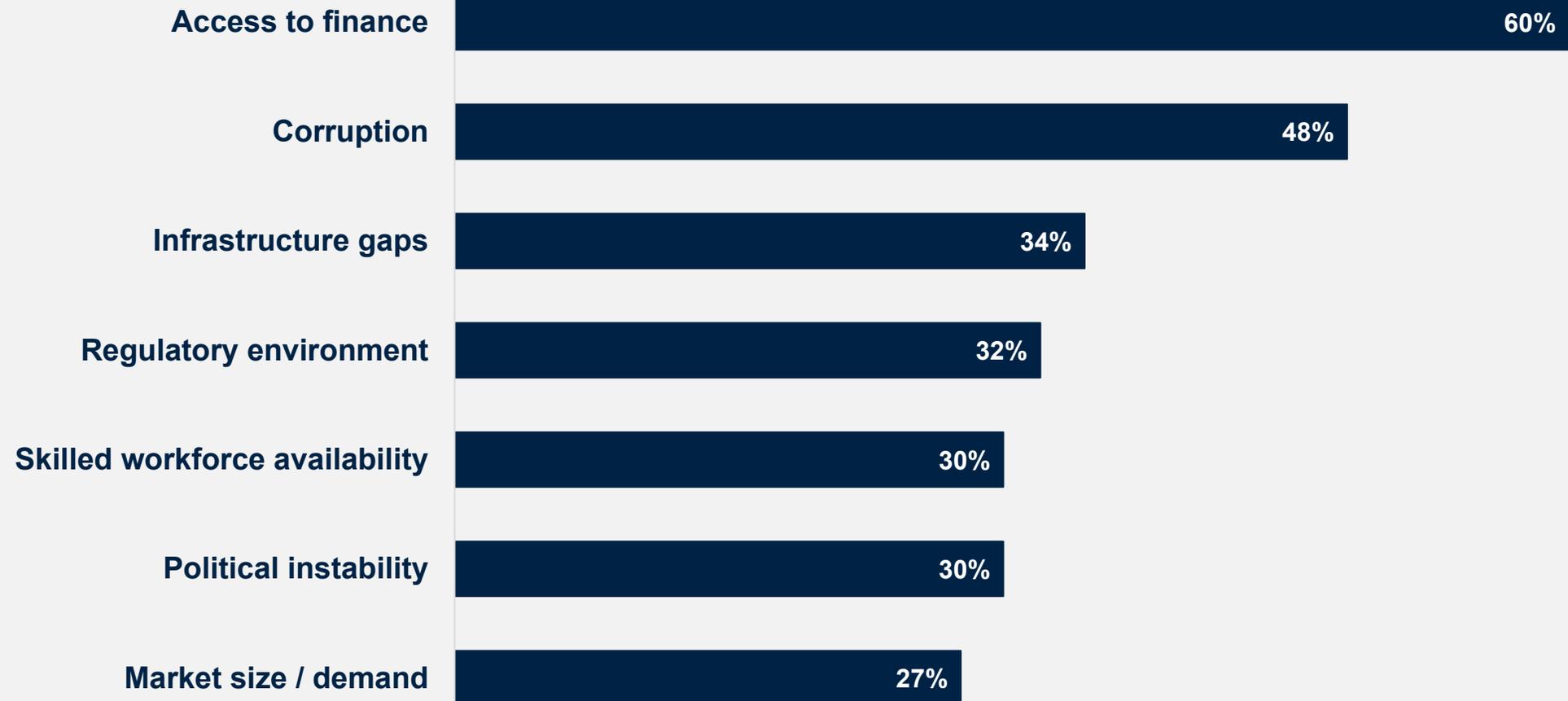
## Top3 Obstacles

<b>of note</b>	Office of the President, PM, Minister	Office of Parliamentarian	Government Institution	Local Government	Bilateral or Multilateral Agency	Civil Society	Private Sector	Academia/ Research Center	Media
Inadequate capacity in the government	43%	33%	32%	27%	48%	35%	34%	31%	31%
Political pressures and obstacles	43%	42%	45%	34%	40%	33%	37%	33%	31%
Corruption	39%	47%	44%	37%	43%	54%	55%	50%	55%
Inadequate donor coordination	32%	11%	15%	21%	17%	15%	13%	16%	18%
Inadequate government accountability	29%	14%	25%	23%	31%	34%	29%	33%	33%
Reforms are not well thought out in light of country challenges	29%	28%	42%	34%	34%	34%	34%	38%	26%
Inadequate citizen/civil society participation	18%	40%	23%	31%	21%	36%	18%	25%	22%
Pressure from outside interest groups	10%	32%	16%	27%	18%	16%	16%	16%	23%
Inadequate private sector participation	0%	16%	18%	22%	15%	15%	31%	17%	14%

When economic and/or social reform efforts fail or are slow to take place in your country, which of the following would you attribute this to? (Select up to 3) (Only asked in 9 countries in FY25, Percentage of Respondents, N=1,936)

# Perceived Obstacles to Private Sector Development

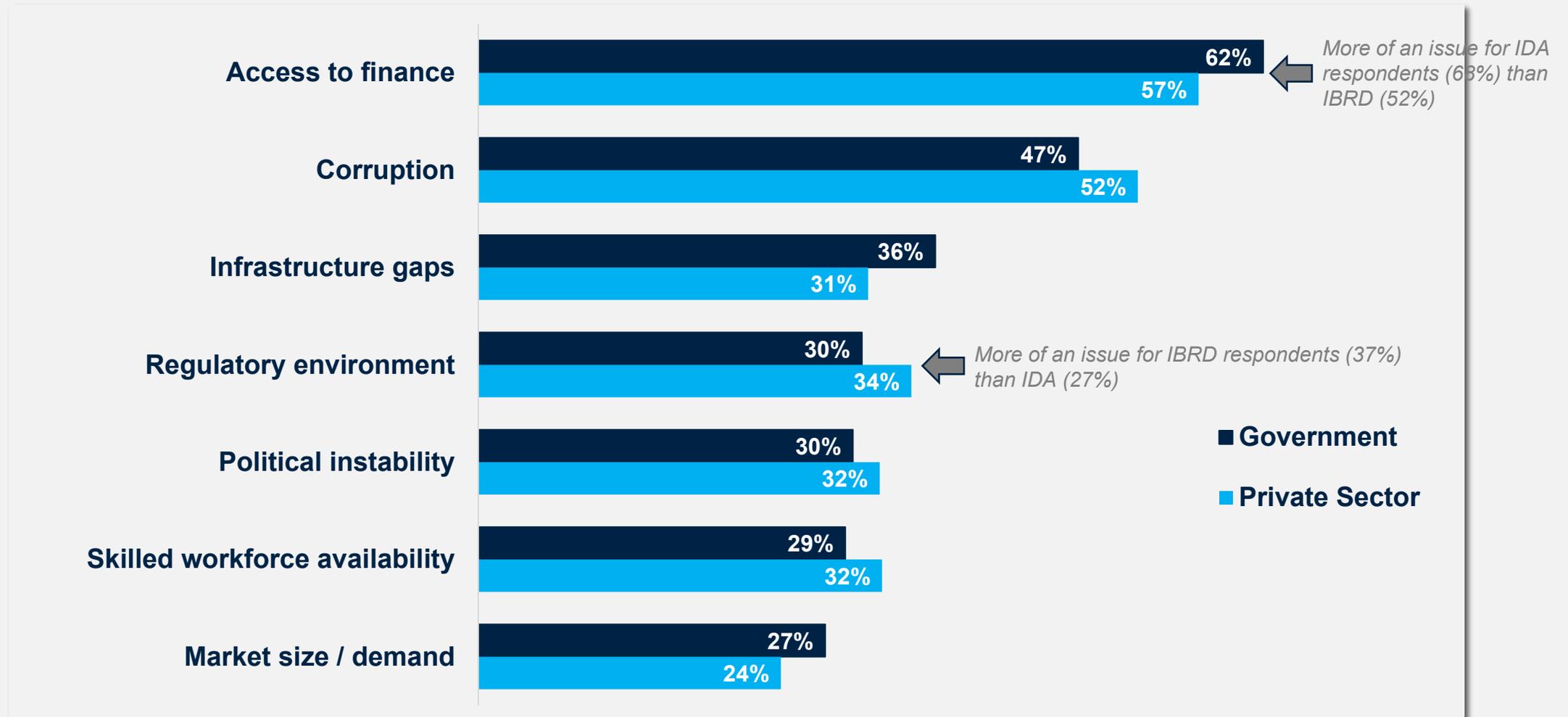
*Access to finance* and *Corruption* were considered the biggest challenges to private sector development.



What are the biggest challenges facing private sector development in your country? (Select up to 3)  
(Percentage of Government and Private Sector Respondents Only)

# Perceived Obstacles to Private Sector Development

*Access to finance* and *Corruption* were considered the biggest challenges to private sector development, with marked similarity between those in government and private sector.



# ***Stakeholder Needs***

*Development priorities, the WBG's value,  
and WBG instruments*



# Top Sectoral Priorities for the WBG's Focus

*Of increased importance for FY25 countries\**

- Education
- Health
- Water / sanitation
- Energy
- Digital development
- Climate change

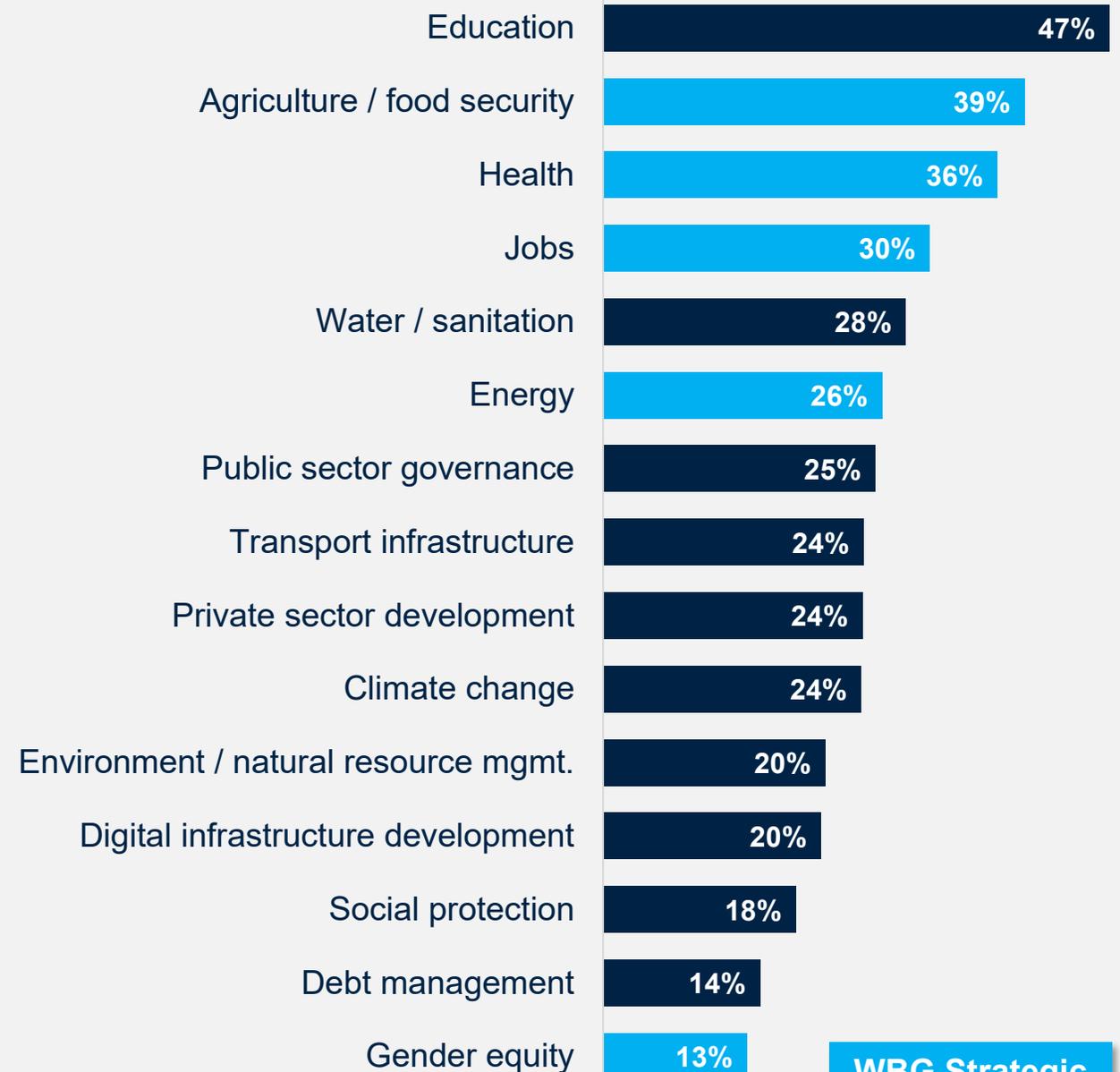
\* Compared to previous survey

**70%**

of stakeholders rated the WBG as "**Very Helpful**" (8-10 rating) in achieving the goals of their projects



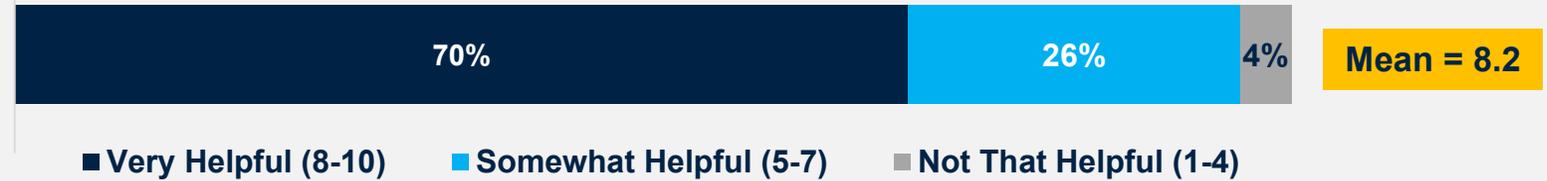
Which areas should the WBG prioritize to have the most impact on development results in your country? (Select up to 5) (Percentage of Respondents)



**WBG Strategic Priorities**

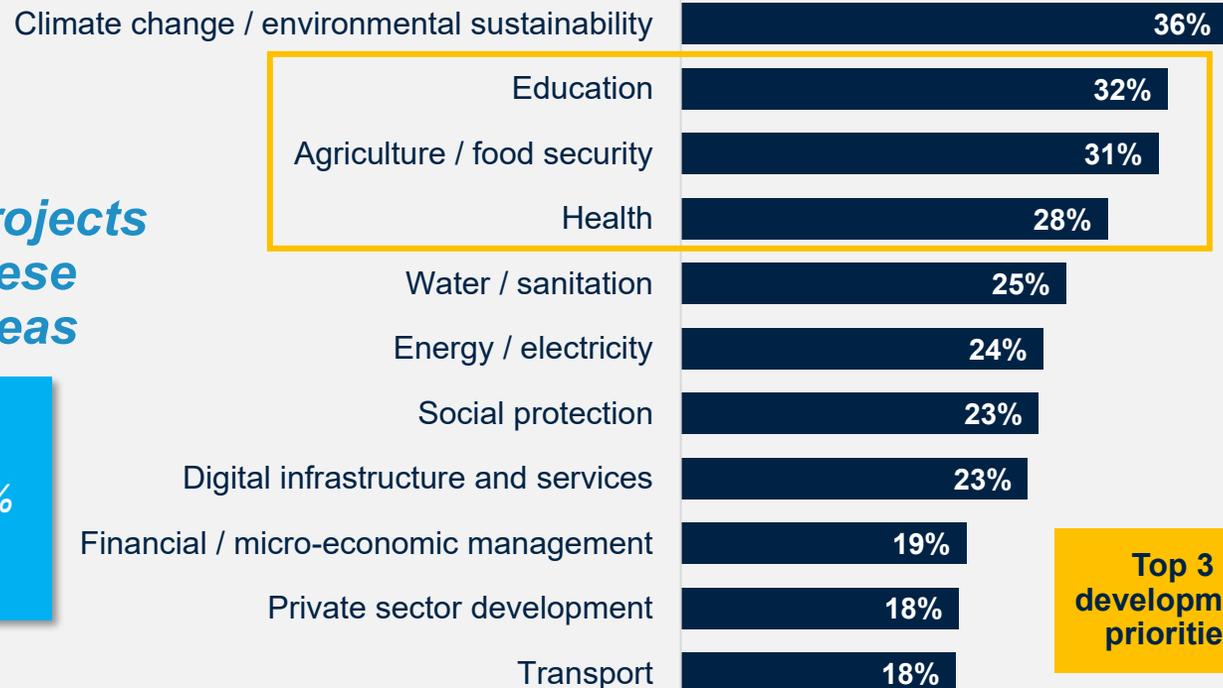
# 7 in 10 WBG Clients Said the WBG Was “Very Helpful” in Achieving the Project Goals for the Project of Which They Were Most Familiar

How helpful was the WBG in achieving the goals of this project or initiative?



**WBG-supported projects incorporated these development areas**

60% of projects incorporated more than 2 sectors; 20% incorporated 5 or more sectors



**Top 3 development priorities**

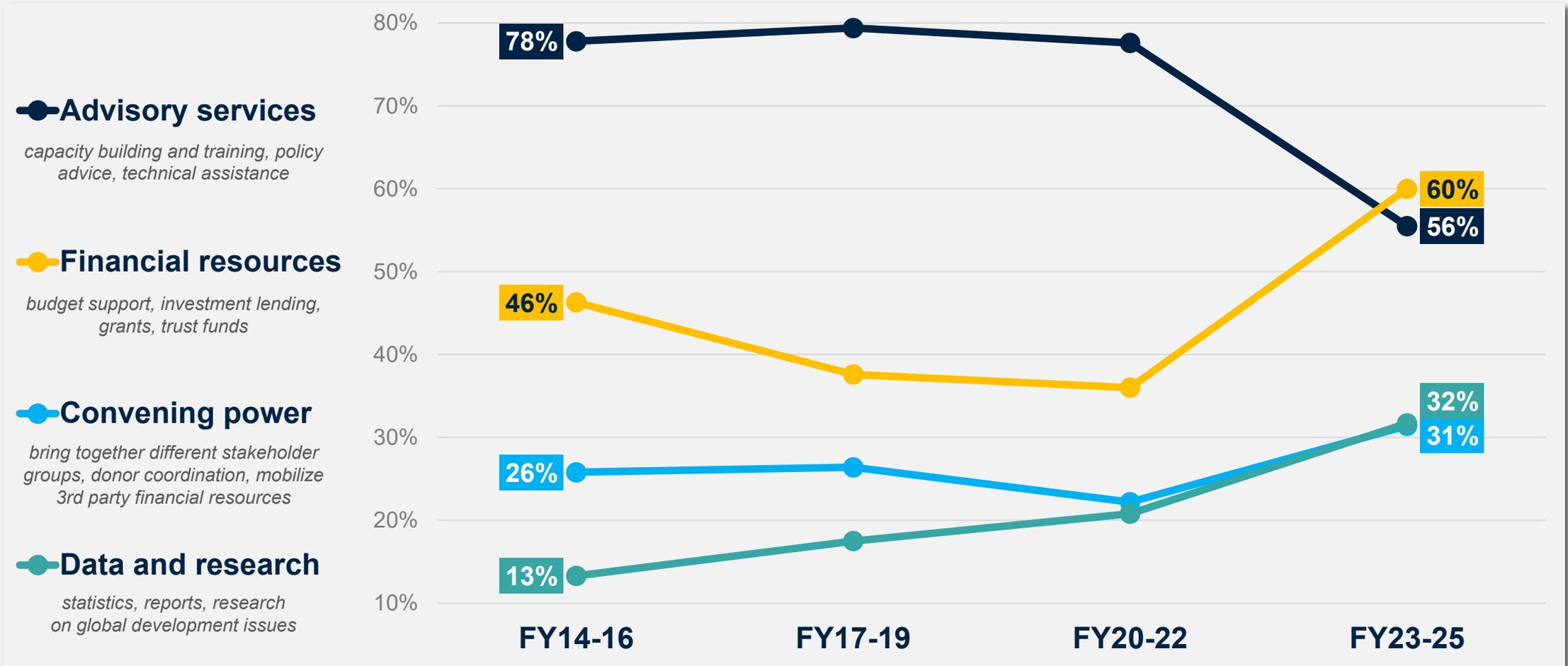
**A cross-cutting sector**  
87% of projects incorporating climate change involved 2 or more sectors

Although jobs was the #4 development priority, it was considered a project outcome, not a stand-alone project sector

Asked only of those who said that they collaborate with the WBG, Percentage of Respondents, N=3,624  
 How helpful was the WBG in achieving the goals of this project or initiative? Scale: 1 Not helpful at all – 10 Very helpful  
 Please select the development area that this WBG-supported project or initiative supported. (Select all that apply)

# What Clients and Partners Value from the WBG

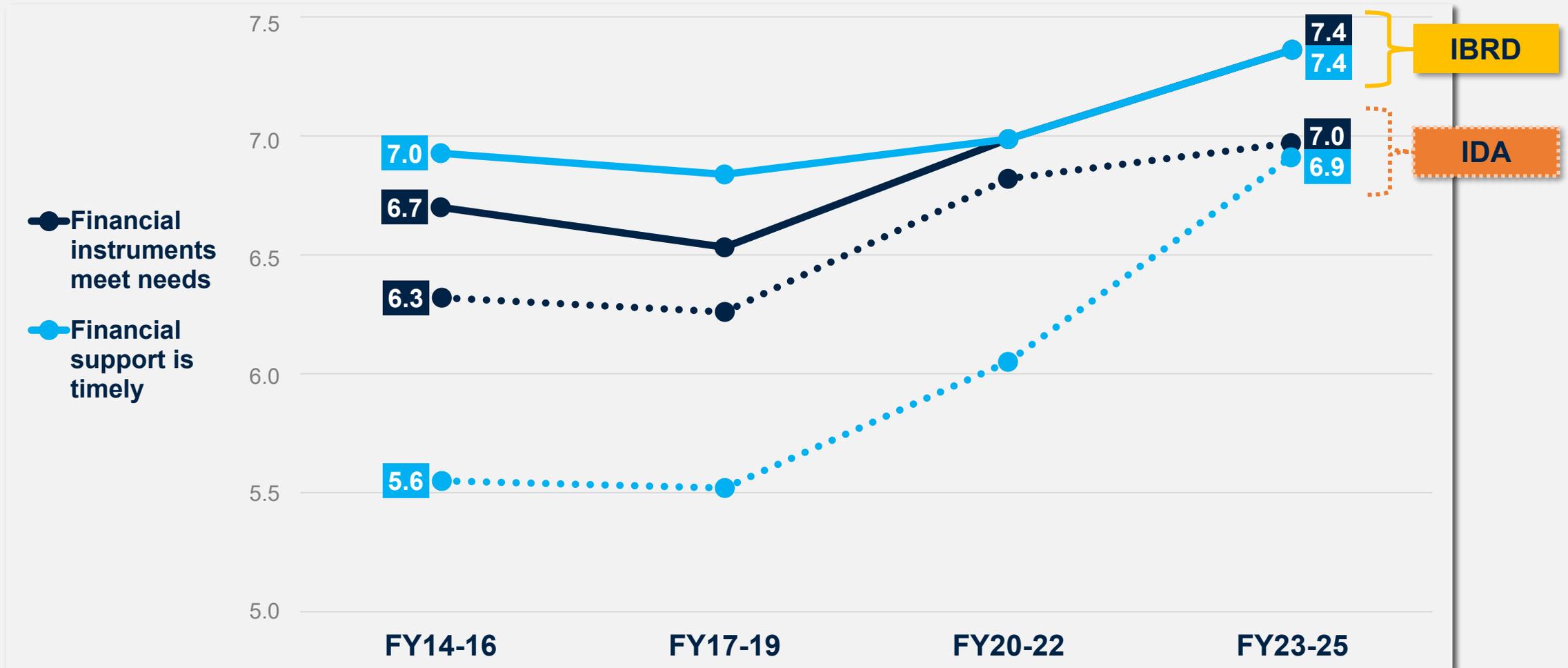
*Financial resources and Advisory services have converged to become equally valued WBG instruments, Convening power and Data/Research have increased in value*



Which WBG instruments do you VALUE the most in your country?  
 (Percentage of CLIENTS / PARTNERS shown)  
 (Respondents could choose 2 of 4+ options)

# Perceptions of Financial Instruments

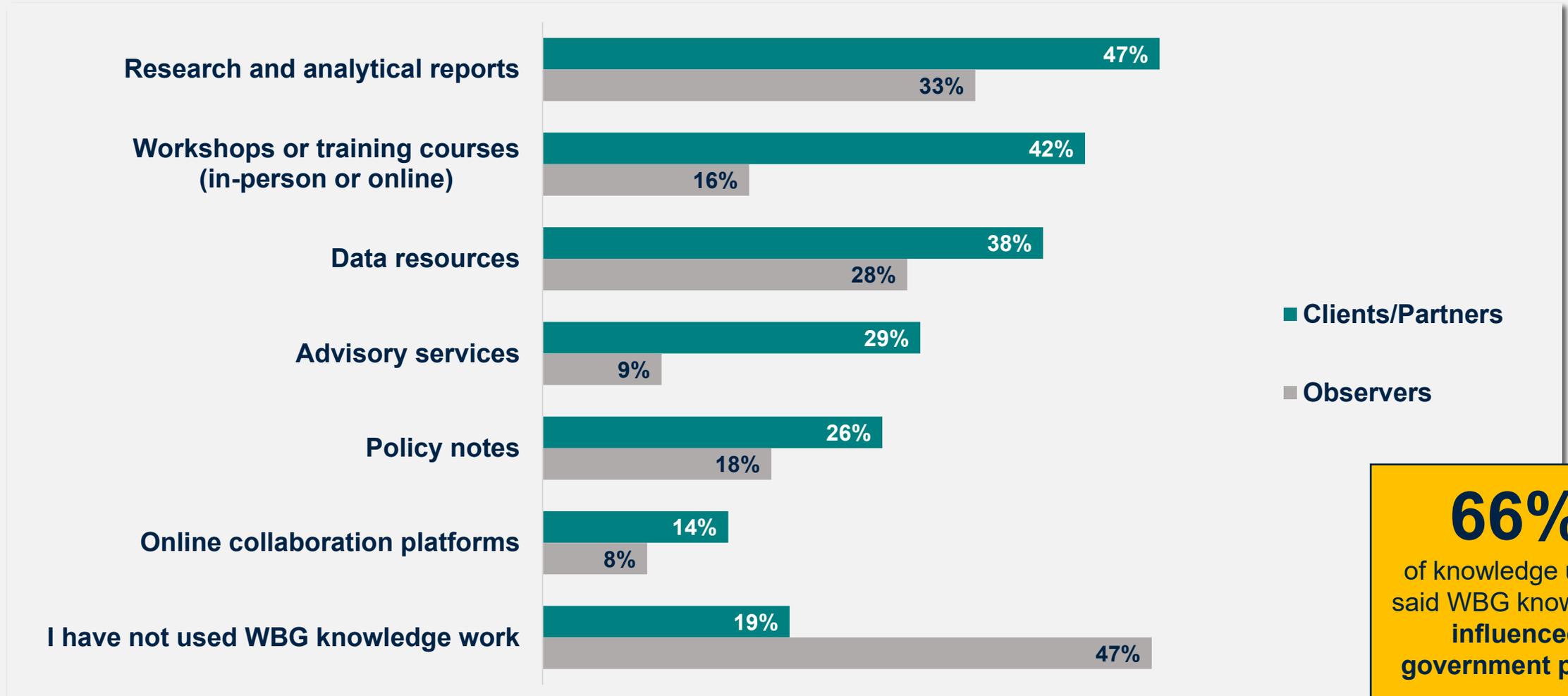
Perceptions of WBG financial support increasingly seen as *Meeting client needs* in a *Timely manner*, especially among stakeholders in IDA countries.



To what extent do you agree with the following statements? Scale: 1 Strongly disagree – 10 Strongly agree  
(Only asked to government respondents and those who collaborate with the WBG)  
The WBG's financial instruments meet the needs of your country.  
The WBG provides financial support in a timely manner.

# Usage of WBG Knowledge Work

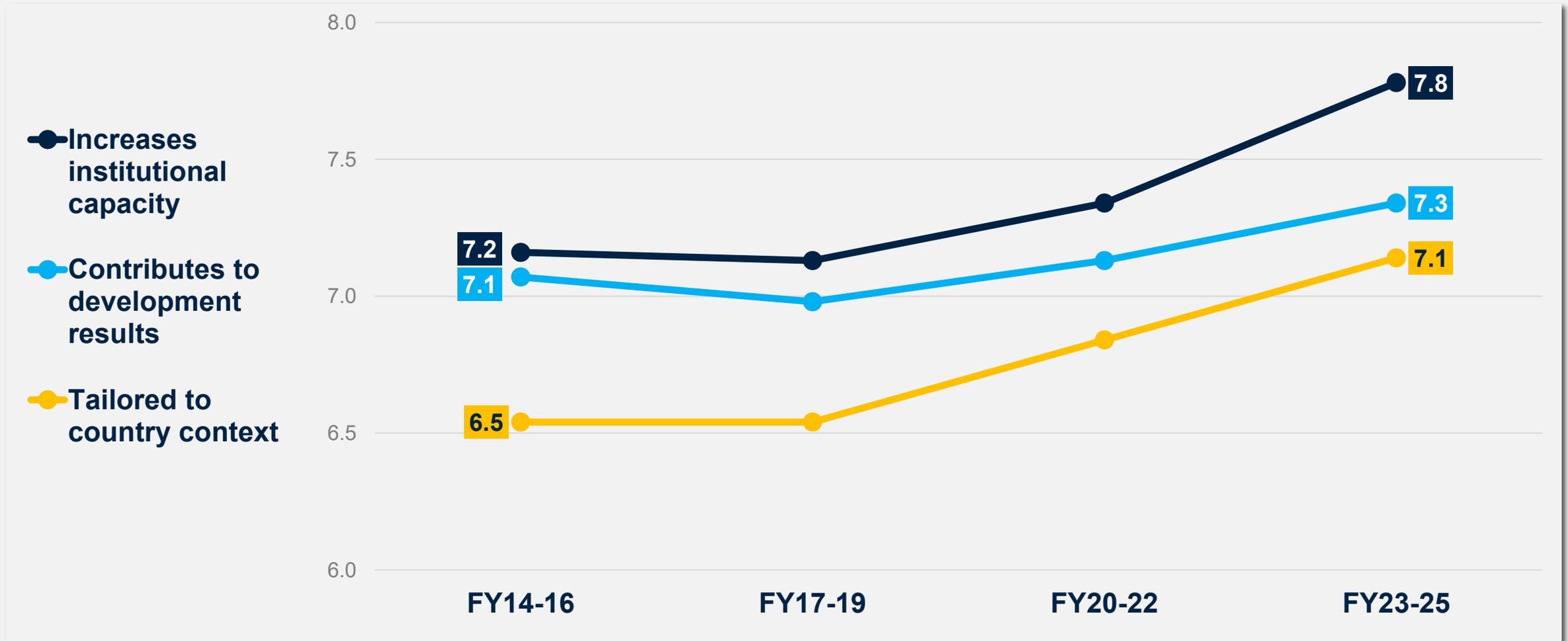
Clients were most likely to use *Research/analytical reports, Workshops/trainings, and Data*. In contrast, nearly half of observers had *Not used WBG knowledge work*.



**66%**  
of knowledge users  
said WBG knowledge  
influenced  
government policy

# Perceptions of WBG Knowledge Work

Agreement that the WBG's knowledge work *Increases capacity* has greatly improved recently, *Contributing to development results* and *Tailoring to country context* also improved.



To what extent do you agree with the following statements? Scale: 1 Strongly disagree – 10 Strongly agree (Only asked to users of WBG knowledge work)

Working with the WBG increases your country's institutional capacity.

The WBG's knowledge work is tailored to your country's context (only asked in 10 countries in FY25, n=1303)

How significant a contribution do you believe the WBG's knowledge work makes to development results in your country?

Scale: 1 Not significant at all– 10 Very significant

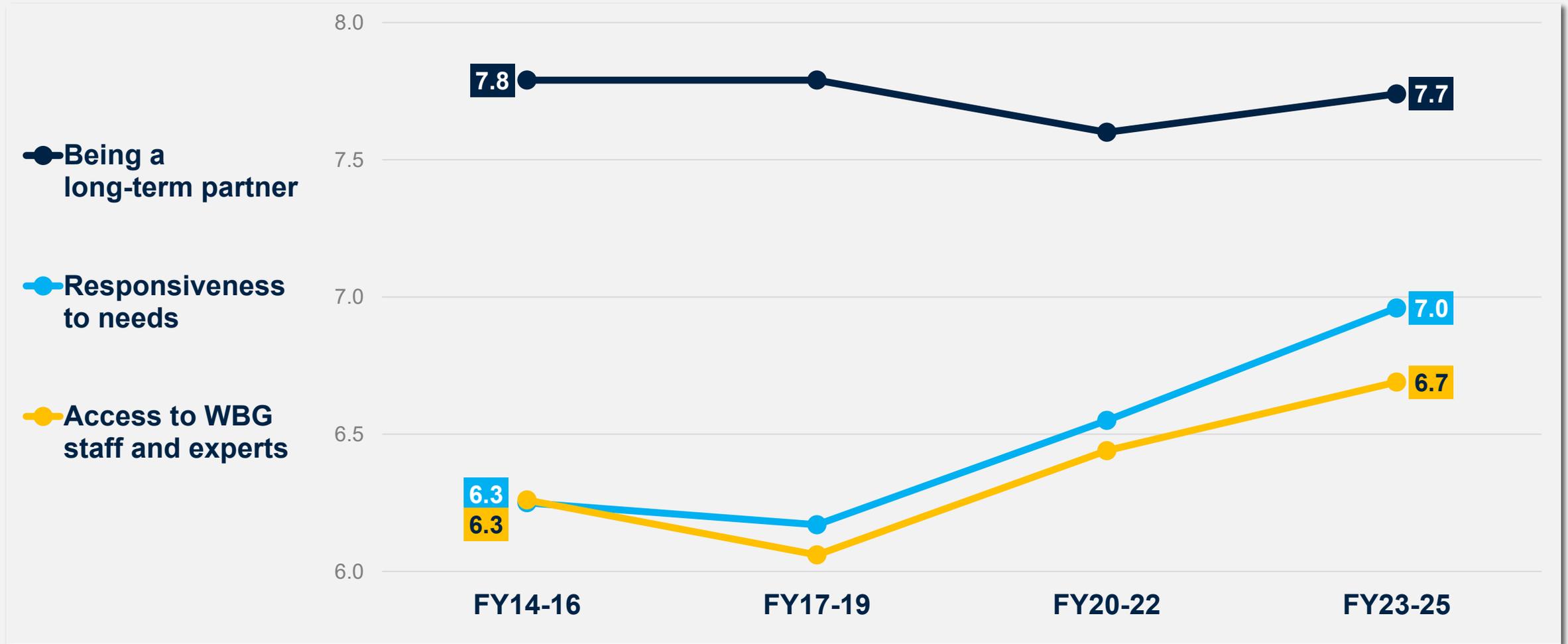
# ***Perceptions of WBG Partnerships***

*Effectiveness of current partnership  
and preferences for future collaborations*



# WBG as an Effective Development Partner

Perceptions of the WBG's *Responsiveness* and *Accessibility* have continued to improve while perceptions that it is a *Long-term partner* have remained steady as one of the highest ratings.



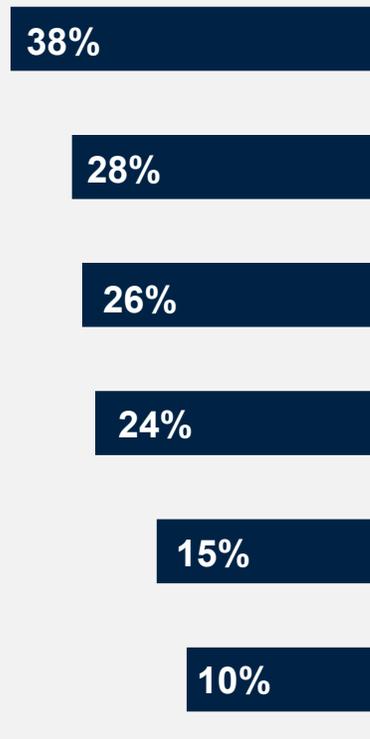
To what extent is the WBG an effective development partner in terms of the following? Scale: 1 To no degree at all – 10 To a very significant degree

- Responsiveness to needs in your country
- Access to WBG staff and experts
- Being a long-term partner to your country

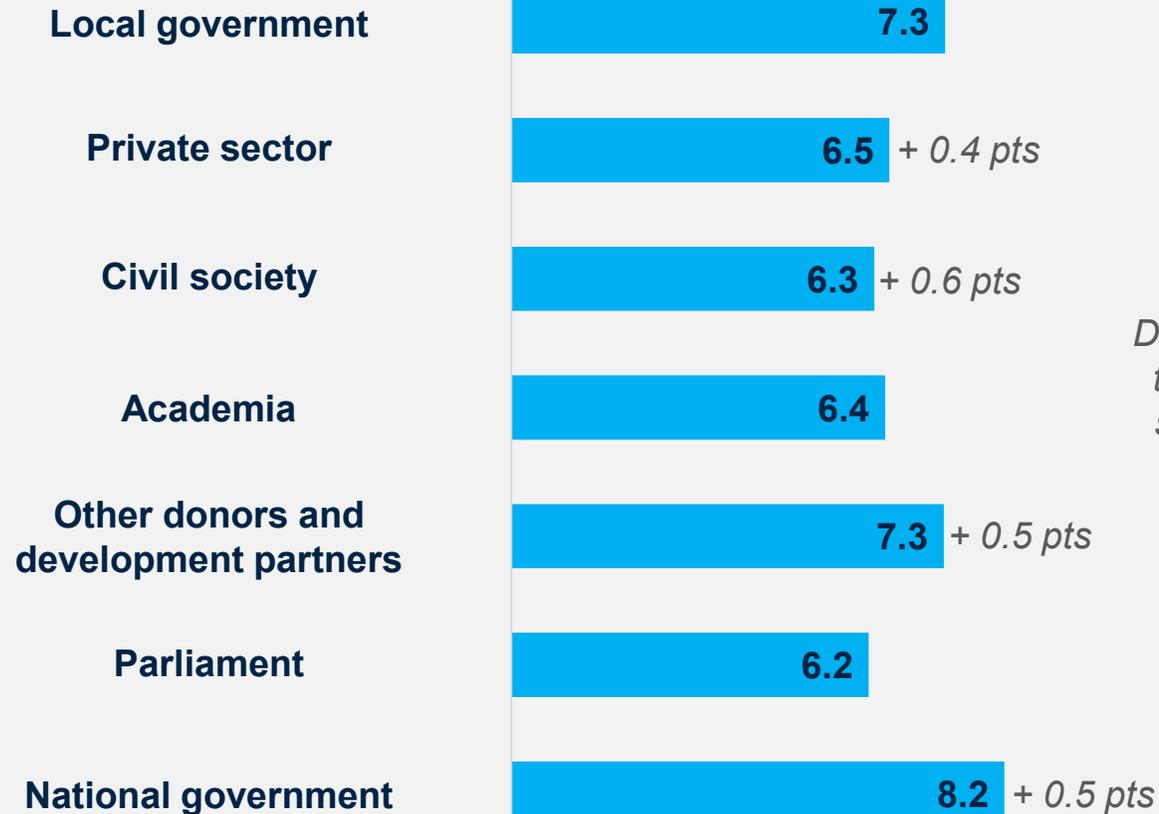
# Partnerships

Although improved, the WBG still receives lower *effectiveness* ratings for collaboration with private sector and CSOs — two groups where collaboration is highly valued.

WBG should collaborate more with...



Effectiveness rating of collaboration (10pt scale)



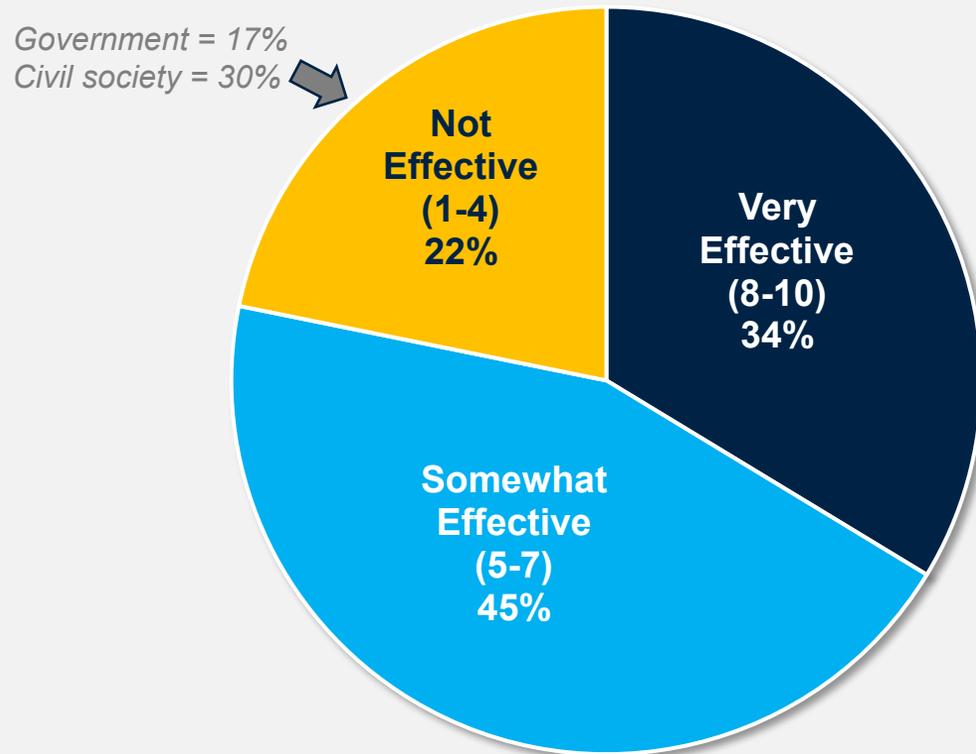
*Difference compared to the previous time the same countries were surveyed*

In addition to its partnership with the national government, which of the following should the WBG collaborate with more to have greater impact in your country? (Select up to 2) (Percentage of Respondents; self-selections excluded)  
 To what extent is the WBG an effective development partner in your country, in terms of collaborating with the following groups:  
 Scale: 1 To no degree at all – 10 To a very significant degree (Mean ratings for self-selections only)

# Perceptions of the WBG's Facilitating Civil Society Participation

A third of stakeholders said the WBG was “*Very effective*” at facilitating civil society participation, while nearly a quarter said the WBG was “*Not effective*” (more so among civil society).

## WBG effectiveness in facilitating civil society participation



## Suggestions to improve the WBG's facilitation of civil society participation

- **Increase, promote, and institutionalize consultation opportunities** by holding more regular, inclusive, and accessible meetings/forums, etc.
- **Ensure transparency and accountability** by monitoring government engagement and promoting fair, open processes.
- **Strengthen WBG partnership with CSOs** rather than relying mainly on government intermediaries.
- **Broaden inclusion and diversity** by actively engaging women, youth, and marginalized groups.



How effective is the WBG in facilitating civil society participation in development policy dialogue and implementation in your country?

Scale: 1 Not effective at all – 10 Very effective

How could the WBG be more effective in facilitating civil society participation in development policy dialogue and implementation (Open-ended)

# ***Insights for communications***

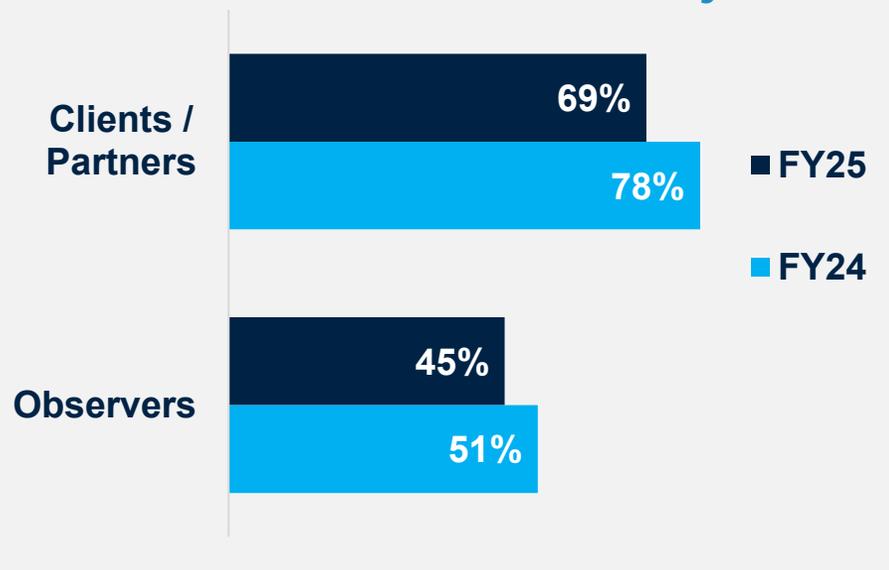
*Communication preferences, message recall,  
key drivers of trust and effectiveness*



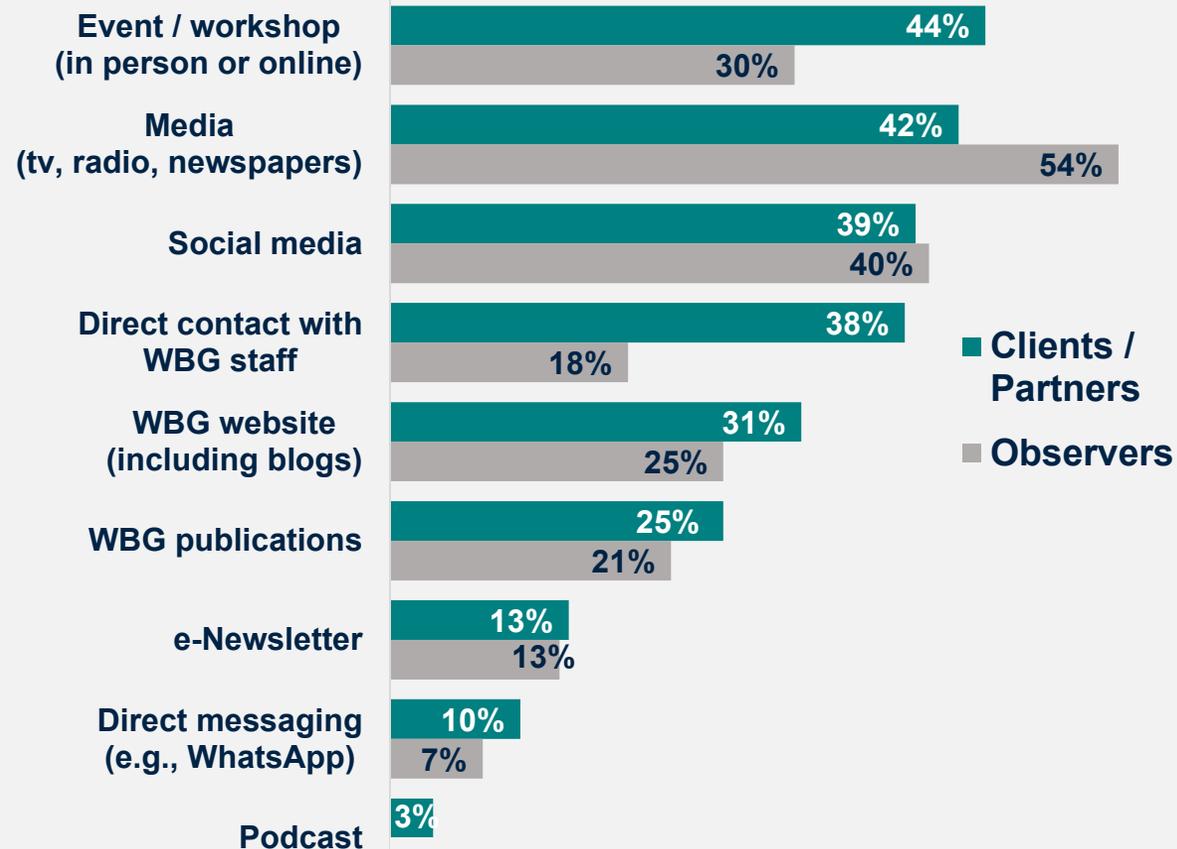
# Message Recall

Although message recall has declined, there is still greater message exposure among clients/partners, with that recall primarily from *Events* or *Direct contact* while observers relied on *Media* or *Social media*.

## Recalled seeing or hearing about the WBG recently



## Where did they see/hear it?

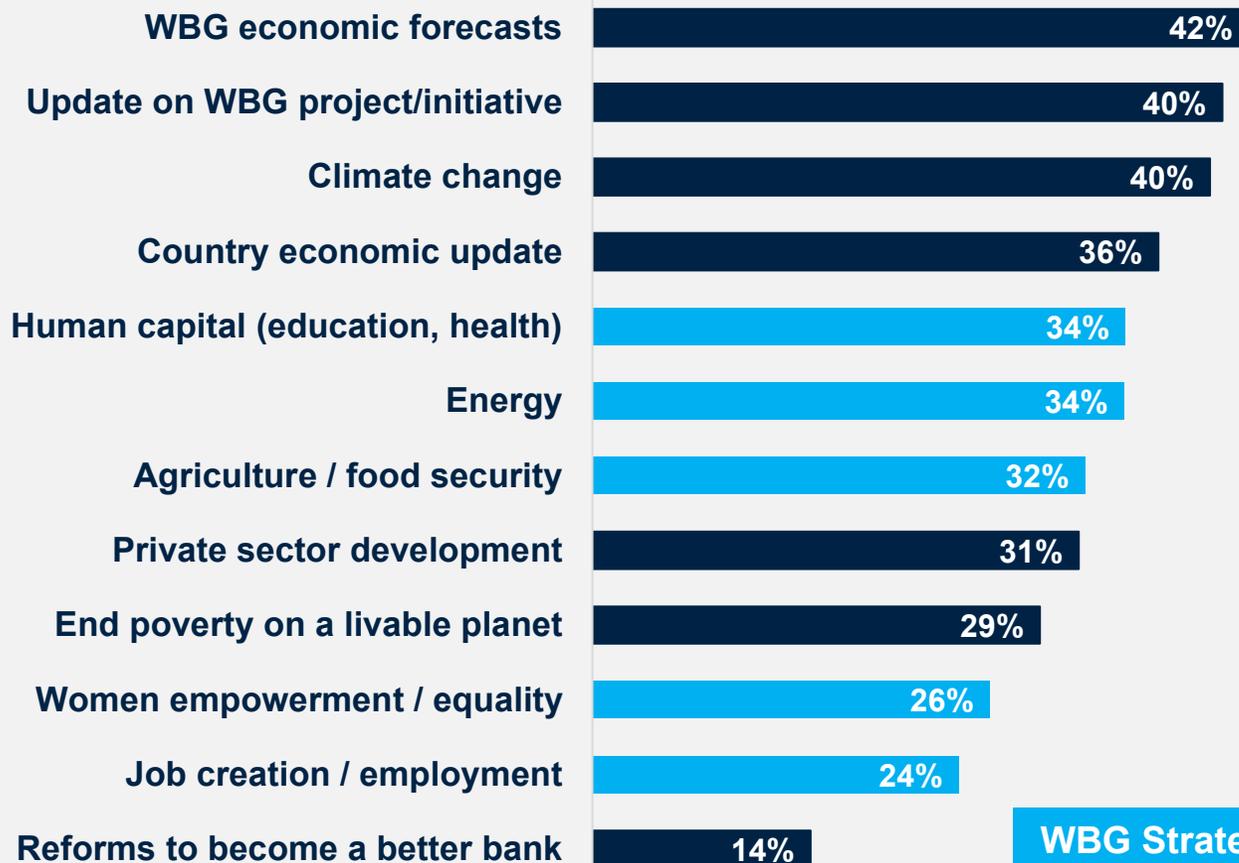


Do you recall seeing or hearing anything about the WBG recently? (Percentage of Respondents)  
Where do you recall seeing or hearing this information? (Select all that apply) (Percentage of Respondents)

# Message Recall – Topics

Among key messaging campaigns, stakeholders most likely to recall the WBG’s human capital, energy, and agriculture/food security messages; regional emphasis further impacts recall.

## Recall for key WBG message campaigns



WBG Strategic Priorities

	AFR	EAP	ECA	LAC	MNA	SAR
Project updates		Economic forecasts	Economic forecasts	Poverty report	CCDR	Climate change
Economic forecasts		Climate change	CCDR	Project updates	Economic forecasts	Pandemic prepared
Human capital		Private sector	Climate change	Economic forecasts	Private sector	Water
Energy		Project updates	Agriculture / Food security	Climate change	Human capital	Human capital
Water		Mission to end poverty	Human capital	Human capital	Country economic update	Economic forecasts

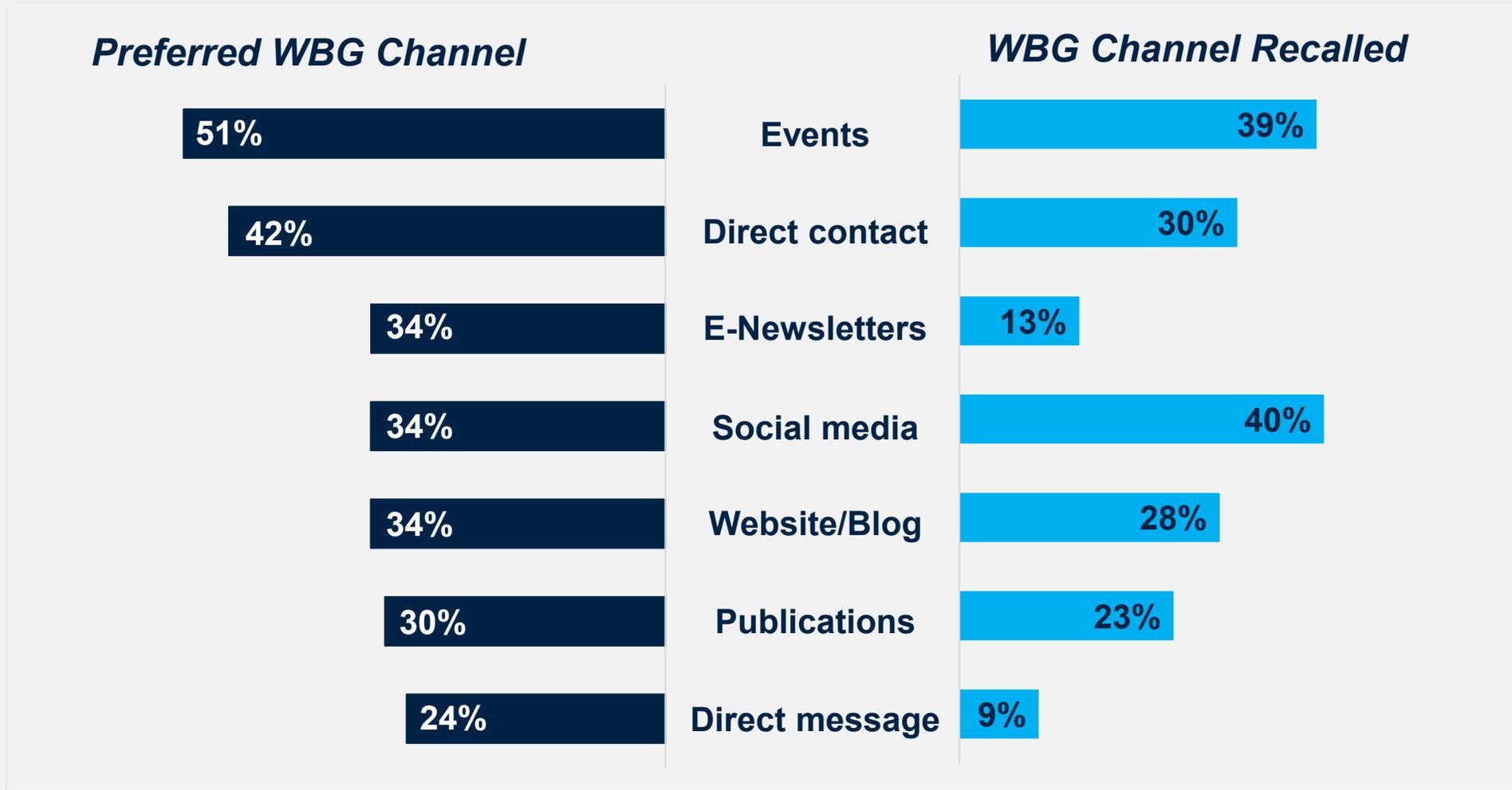


What topics were included in what you saw or heard? (Check all that apply)  
(Percentage of Respondents; only select recall topics shown)

# WBG Channels – Preferences Vs. Recall

Stakeholders prefer *Events* and *Direct contact*.

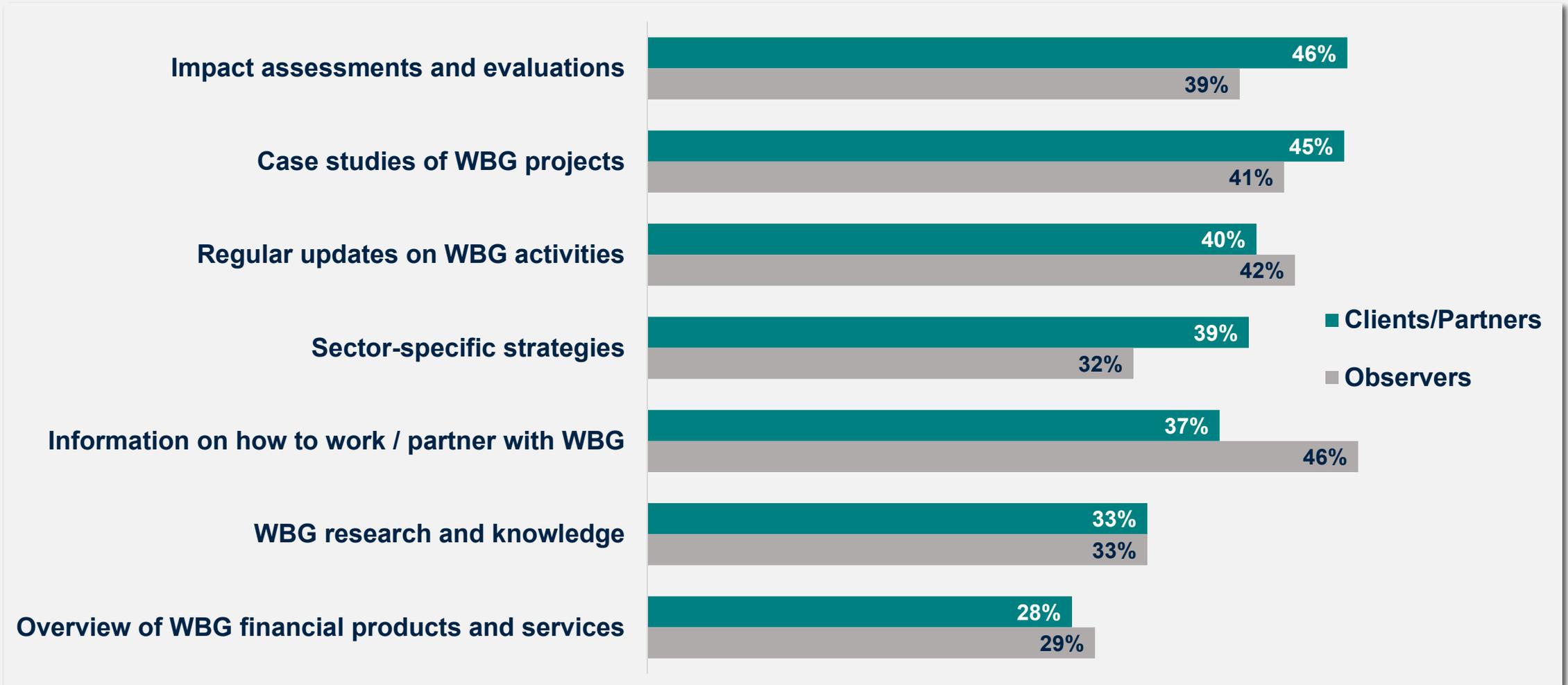
They also value *e-Newsletters* and *Direct messages* but are less likely to recall (utilize) them.



How would you prefer to obtain communication from the WBG? (Select up to 3) (Percentage of Respondents)  
Where do you recall seeing or hearing this information? (Select all that apply) (Percentage of Respondents)  
(Only showing those that are Bank "controlled")

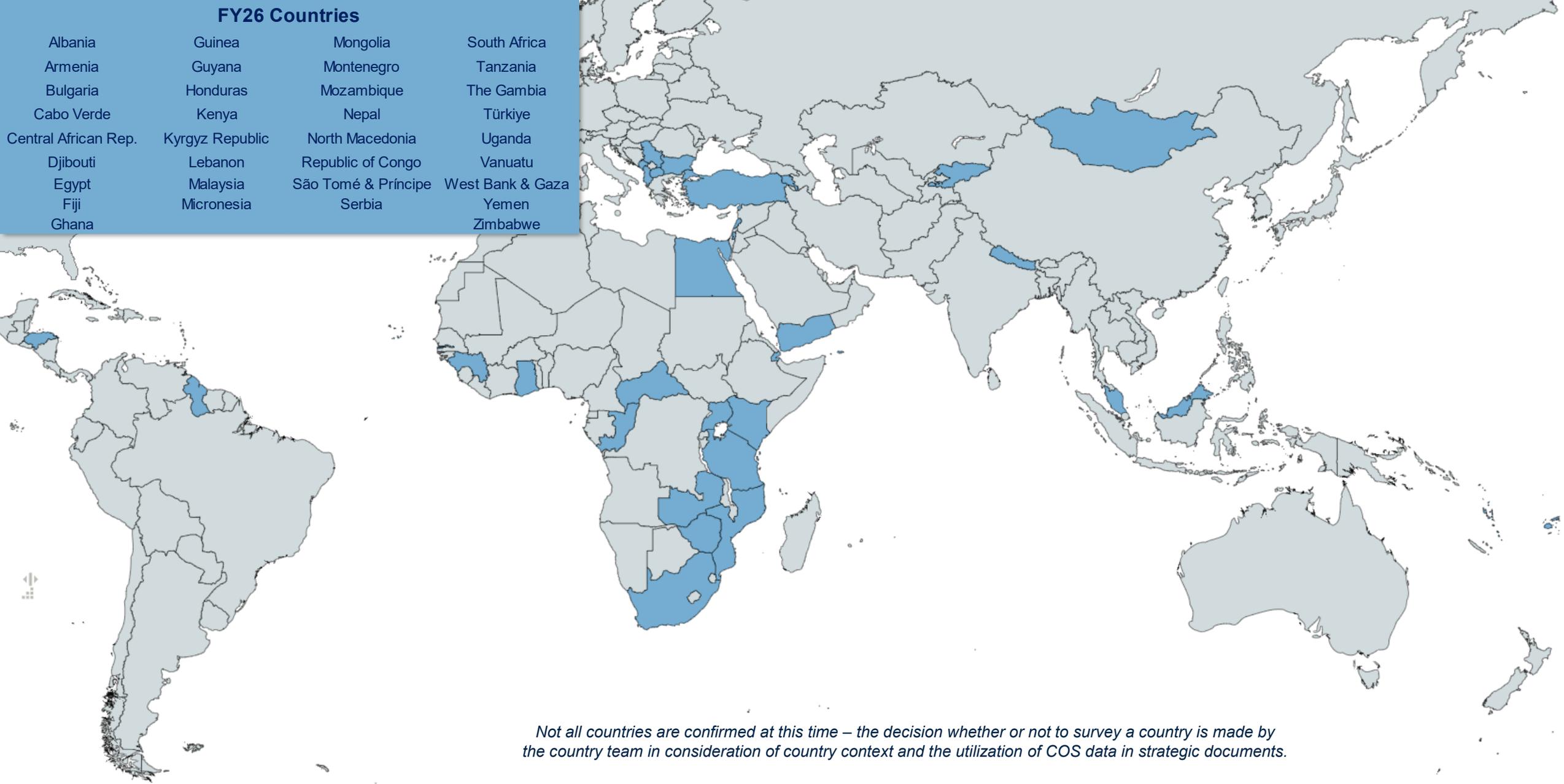
# Preferred Information to Understand WBG Role in Client Countries

Clients felt *Impact assessments* would be helpful while observers wanted information on how to *Work/partner with WBG*; both wanted *Updates on WBG activities* and *Case studies of projects*.



## FY26 Countries

Albania	Guinea	Mongolia	South Africa
Armenia	Guyana	Montenegro	Tanzania
Bulgaria	Honduras	Mozambique	The Gambia
Cabo Verde	Kenya	Nepal	Türkiye
Central African Rep.	Kyrgyz Republic	North Macedonia	Uganda
Djibouti	Lebanon	Republic of Congo	Vanuatu
Egypt	Malaysia	São Tomé & Príncipe	West Bank & Gaza
Fiji	Micronesia	Serbia	Yemen
Ghana		Zimbabwe	



*Not all countries are confirmed at this time – the decision whether or not to survey a country is made by the country team in consideration of country context and the utilization of COS data in strategic documents.*

# Thank you

*For more information about this report  
or the Country Opinion Survey program,  
please contact:*

[countrysurveys@worldbankgroup.org](mailto:countrysurveys@worldbankgroup.org)