



CountryOpinionSurveys

FY 2025 Ethiopia

Country Opinion Survey Report

Acknowledgements

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Objectives

This survey was designed to assist the World Bank Group (WBG) in better understanding how stakeholders in Ethiopia perceive the WBG. The survey explored the following questions:

- 1. Overall Context:** How familiar are they with the WBG? How much do they trust the WBG?
- 2. Key Indicators:** What opinion do key stakeholders have of the WBG regarding its effectiveness, relevance, alignment with Ethiopia's development priorities, and other key indicators? Are opinions improving or declining?
- 3. Development Priorities:** What areas of development are perceived to be the most important? Have the priorities changed over the past seven years? How effective is the WBG perceived to be in these areas?
- 4. Engagement on the Ground:** How is the WBG perceived as a development partner in Ethiopia? Are opinions improving or declining?
- 5. Financial Instruments and Knowledge Work:** What do key stakeholders value the most regarding the WBG's work in Ethiopia? What opinion do key stakeholders have of WBG financial instruments and knowledge products? Are opinions improving or declining? What are stakeholders' suggestions for improving WBG's effectiveness?
- 6. Communication and Outreach:** What are the preferred communication channels? Are there differences among stakeholder groups in terms of preferred channels?
- 7. Message Recall:** What key topics do stakeholders recall when the WBG communicates?



Methodology Overview

■ Fielded in November – December 2024

- 520 potential participants were asked to complete a mostly quantitative survey
- Respondents completed the questionnaire online or on paper
- List of names provided by the WBG country team and supplemented by the field agency
- Data collection managed on the ground by the field agency

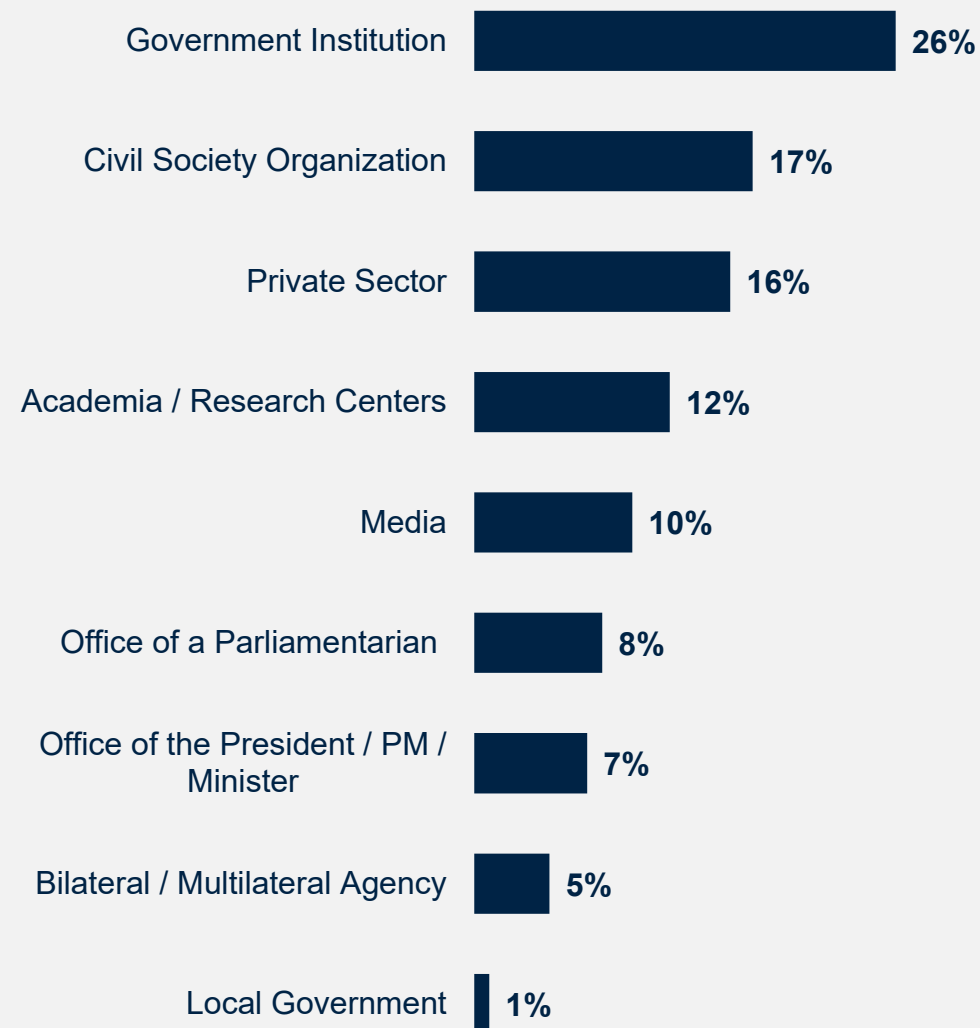
■ 220 participants (42% response rate)

- 59% currently collaborate with the WBG
- 93% from Addis Ababa

■ Compared to FY18 Country Survey

- 193 participants (64% response rate)
- 44% collaborated with the WBG
- 96% from the Greater Malé Region

Click [here](#) for details of the Respondent Sample and Methodology.



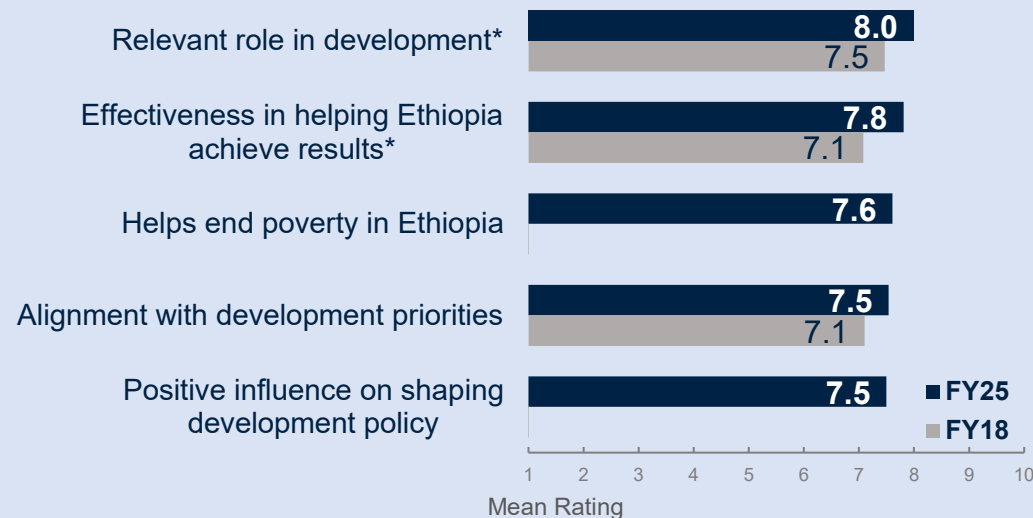
What is your primary professional affiliation? (Select only 1 response)
(Percentage of Respondents, N=218)

Executive Summary

1. Overall Context: This year, stakeholders reported significantly higher levels of familiarity with the WBG (mean=7.7 on a 10-point scale) compared to the FY18 Country Survey. Respondents were **more familiar with the WBG than with other development institutions working in Ethiopia** and recognized the WBG as **one of the most trusted institutions** in the country (mean=8.0).

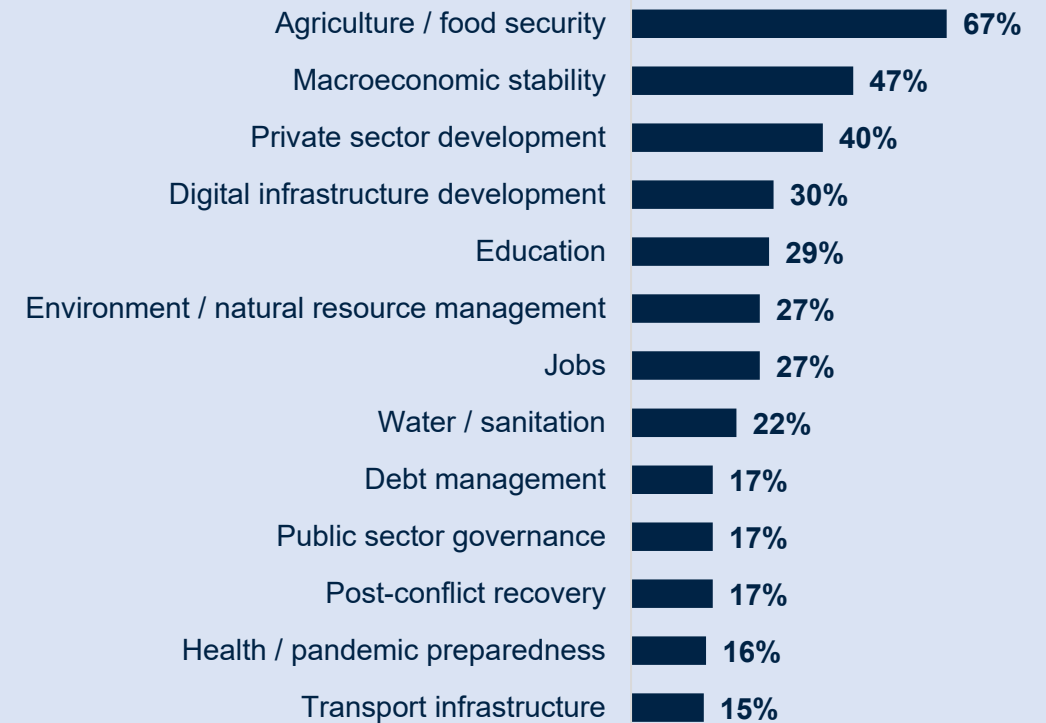
When asked about the FCV context, respondents indicated that **lack of security** and **political uncertainty** were the main drivers of **fragility** in Ethiopia. A quarter of respondents (mainly from the government) did not consider Ethiopia a fragile state.

2. Key Indicators: Stakeholders shared very positive perceptions of the WBG’s relevance, effectiveness in helping Ethiopia achieve development results (both significantly improved since FY18), alignment with the country’s priorities, and positive influence on policy.



Respondents’ ratings for these key performance indicators in Ethiopia were higher than those of other IDA countries and other Eastern and Southern African countries surveyed in FY24.

3. Development Priorities: Two-thirds of stakeholders would like the WBG to focus its resources on **agriculture / food security**. **Macroeconomic stability, private sector development, and digital infrastructure development** were also indicated among the top areas for the Bank’s support. The latter two became much higher priorities, increasing in importance from 17% and 3% in FY18 to 40% and 30% in FY25, respectively.



Executive Summary (continued)

Respondents also indicated that WBG should play a leading role among international partners in supporting Ethiopia's **human capital** development, including education, health, and social protection.

4. Engagement on the Ground: In FY25, stakeholders perceived the WBG as a **long-term partner** (mean=8.4) that collaborates well with the national government (mean=8.3) and other donors and development partners (mean=8.0). Perceptions of the institution's **responsiveness** (mean=7.2) and openness in sharing data and information (mean=7.0) were also positive. Compared to FY18, respondents gave significantly higher ratings for the WBG's **flexibility** when circumstances change (mean=6.4). However, ratings for WBG's staff accessibility (mean=6.7) and flexibility remained moderate.

In terms of its partnerships, the WBG was perceived relatively positively for the effectiveness of its **collaboration with academia, the private sector, and civil society** (mean=7.0 for all three). However, ratings for the WBG's collaboration with the **parliament** (mean=6.5) and **local government** (mean=6.4) were more moderate.

A majority of stakeholders in FY25 indicated that the WBG should collaborate more with the **private sector** (57%) and **civil society** (41%), in addition to its partnership with the national government. Approximately a third of respondents welcomed more collaboration with **local governments** (34%). In qualitative

comments, respondents emphasized the need for greater collaboration between the WBG and the private sector to stimulate investment, enhance economic resilience, and create sustainable job opportunities. They emphasized that supporting private sector-led initiatives, improving access to finance, and fostering public-private partnerships would drive long-term development and innovation.

5. Financial Instruments and Knowledge Work: Stakeholders considered the WBG's **financial resources** (77%) to be its greatest value to Ethiopia. In addition, a third of respondents valued **capacity development** (33%) and **technical assistance and implementation support** (30%).

Regarding the WBG's financial instruments, respondents had the highest levels of agreement that the **WBG insists on accountability through its lending** (mean=7.9). Moreover, perceptions of the WBG's **Environmental and Social Framework requirements** have improved significantly compared to FY18 (mean=7.9). Ratings for the **timeliness** of the WBG's support (mean=6.7) and its **meeting Ethiopia's needs** (mean=6.8) were slightly more moderate.

More than 6 in 10 respondents (63%) indicated they had used the WBG's **knowledge work**. Respondents agreed that it helps increase Ethiopia's **institutional capacity** (mean=8.4) and brings **global expertise** to Ethiopia (mean=8.2). They were satisfied with the quality of the WBG's knowledge work (mean=8.2).



Executive Summary (continued)

Respondents acknowledged that WBG's work makes a significant **contribution** to development results in the country (mean=7.6) but gave rather moderate ratings for its **dissemination** (mean=6.5, unchanged since FY18).

6. Communication and Outreach: When asked how they would prefer to receive communications from the WBG, over half of respondents (57%) preferred the **WBG website** and **events** (56%), followed by **direct contact with WBG staff** (44%).

6.1 Communication about Climate Change: This year's COS went a step further in understanding what potential impacts of climate change are of greatest concern to WBG stakeholders. In Ethiopia, most respondents were very concerned about **decreased crop yields/increased food insecurity** (80%), **loss of jobs** (70%), and **more frequent and severe droughts** (70%). These key areas of concern should be considered to make communications and messaging about climate change more impactful in Ethiopia.

7. Message Recall: Eighty-three percent of respondents recalled seeing or hearing something about the WBG recently, most often about **WBG's economic forecasts** (54%) and the WBG's **work on food security** (39%) and **climate change** (38%). They were most likely to report seeing this information on television (47%), WBG websites (46%), or in newspapers (40%).

Summary of responses to an open-ended question: "In your opinion, what is the most important thing the World Bank Group could do to increase its effectiveness in Ethiopia?"

Stakeholders emphasized the need for WBG to deepen its collaboration with both **national** and **local government agencies** to enhance policy coordination, implementation, and the overall impact of development projects. Many stressed that **engagement with local authorities** is particularly important, as they are directly responsible for service delivery and can ensure that WBG initiatives are tailored to community needs. Additionally, respondents highlighted that stronger partnerships with government institutions could improve governance, facilitate regulatory reforms, and enhance the sustainability of development efforts.

The **private sector** was another group where stakeholders would like more engagement to drive economic growth, create jobs, and enhance investment opportunities. According to respondents, supporting small and medium enterprises and fostering public-private partnerships would strengthen local businesses and improve market access. Additionally, they emphasized that WBG should **facilitate private sector-led solutions** in key sectors such as infrastructure, energy, and financial services to promote sustainable development and innovation.



Executive Summary (continued)

Stakeholders emphasized that the WBG should strengthen its collaboration with **non-government (NGOs)** and **civil society organizations (including youth groups)** to ensure that development initiatives are inclusive, community-driven, and responsive to grassroots needs. They believed that NGOs play a critical role in reaching marginalized populations and can provide valuable insights into social and environmental challenges that government agencies may overlook.

Respondents also suggested that partnering with **academic and research institutions** would enhance data-driven decision-making, allowing WBG to design more effective and evidence-based policies. Some highlighted that universities and think tanks can contribute specialized expertise and innovative solutions, particularly in areas such as governance, climate resilience, and economic development.

Furthermore, stakeholders emphasized **capacity building** and **institutional development**, highlighting the need for the WBG to strengthen technical and governance skills across various sectors. Many suggested that more localized research and data analysis would improve the relevance of WBG's knowledge work, ensuring that policy recommendations align with country-specific challenges. There was also a strong demand for training programs tailored to government officials, private sector actors, and civil society.

Many stakeholders believed that the WBG should **work more closely with local experts and institutions** to ensure sustainable knowledge-sharing and long-term impact. Some suggested that WBG's research should focus more on practical applications rather than theory, with better **dissemination** to ensure accessibility for all stakeholders.

In relation to the WBG's operational effectiveness, respondents highlighted the need for **stronger support to project implementation**, calling for better execution, follow-through, and alignment with national priorities to ensure development initiatives have a lasting impact. Many stressed that the WBG should **streamline decision-making processes**, reducing bureaucratic delays to respond more quickly to urgent challenges. Further improving monitoring and evaluation was seen as essential, with calls for greater **transparency, accountability**, and data-driven assessments to track project effectiveness.

Finally, stakeholders emphasized that the WBG should strengthen its **engagement with journalists** and the media to enhance public awareness of its work, priorities, and impact. Some suggested that research findings, data, and policy recommendations should be made **more accessible**, particularly to government agencies, local institutions, and civil society.



Overall Context

“... the Bank has to increase its influence to bring the government into public accountability; the Bank should influence evidence-based development activities to be the normative mode of operations in the country. ...”

(Media Respondent)



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In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Ethiopia? (N=92)

Increased Familiarity with the World Bank Group

- **Comparison of FY18 and FY25:** Respondents in this year's Country Survey reported significantly higher levels of familiarity with the World Bank Group compared to respondents in the FY18 Survey:

Mean familiarity: **FY25 = 7.7**

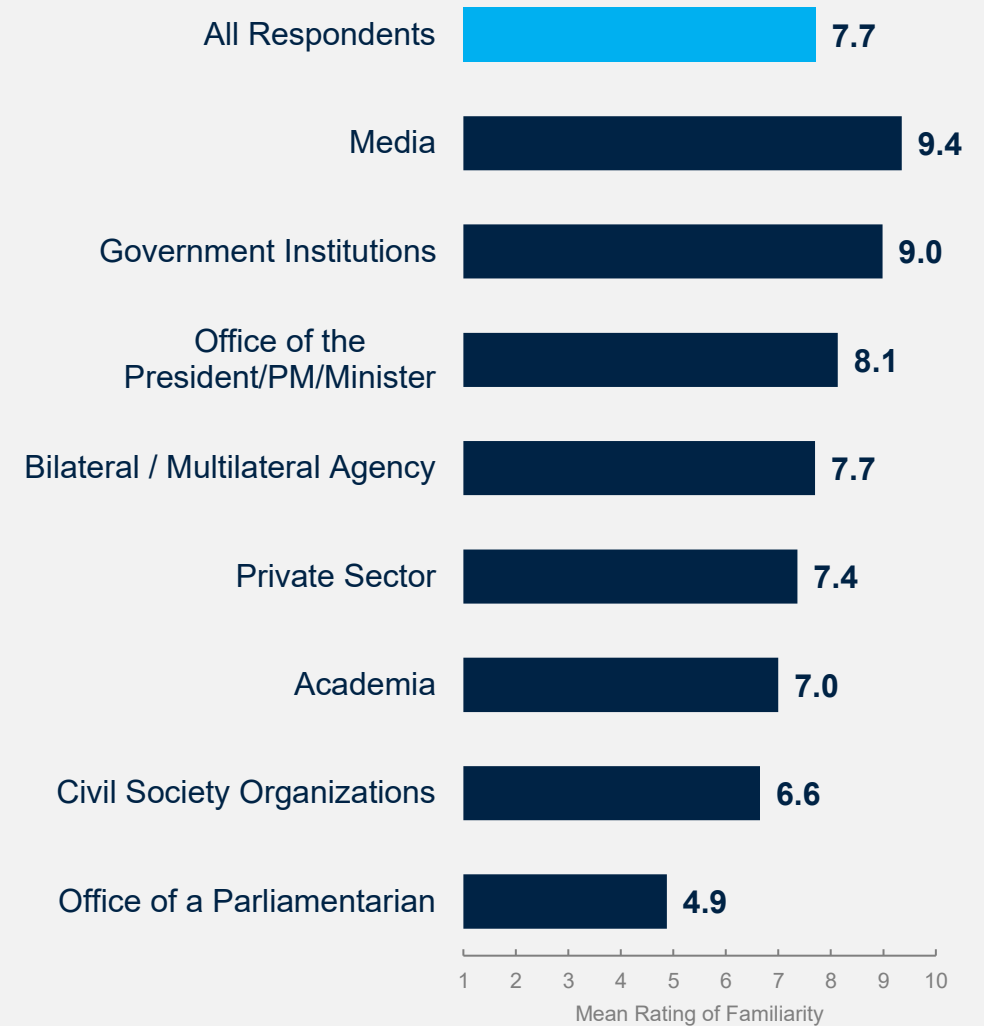
FY18 = 6.5

- **Collaboration with the WBG:** Respondents who indicated that they collaborate with the WBG reported significantly higher levels of familiarity with the institution's work:

Mean familiarity: **Collaborate with WBG = 8.2**

Do not collaborate = 7.0

Stakeholders: Respondents from the media indicated the highest familiarity with the WBG, whereas respondents from the office of a parliamentarian reported significantly lower familiarity.



Note: The sample size from the local government was too small to be included in the stakeholder analysis.



Stakeholders Most Familiar with the WBG

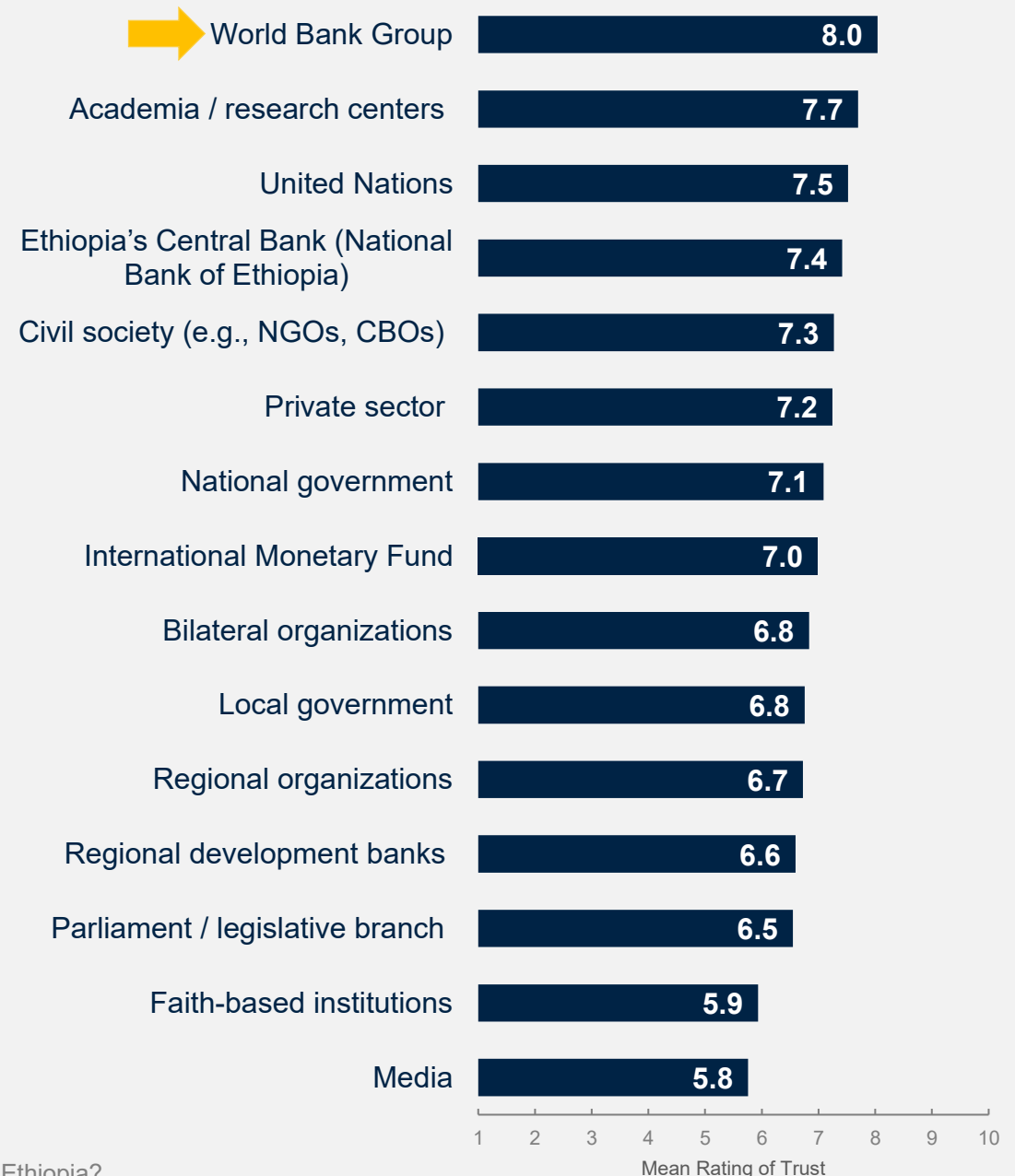
- Respondents in this year's Country Survey were asked to indicate their familiarity with the work of several international organizations and the World Bank Group. Of these organizations, respondents in Ethiopia indicated the highest levels of familiarity with the work of the WBG, followed by the United Nations (UN). Respondents were least familiar with the work of the International Monetary Fund (IMF).



The WBG Received the Highest Trust Ratings

Respondents gave the highest trust ratings to the **WBG**, followed by **academia**, the **UN**, and Ethiopia's **central bank**. Trust ratings for the media and faith-based institutions were among the lowest.

There was a significant difference in trust levels among stakeholder groups, with respondents from media, academia, and the private sector expressing rather low levels of trust in government institutions.



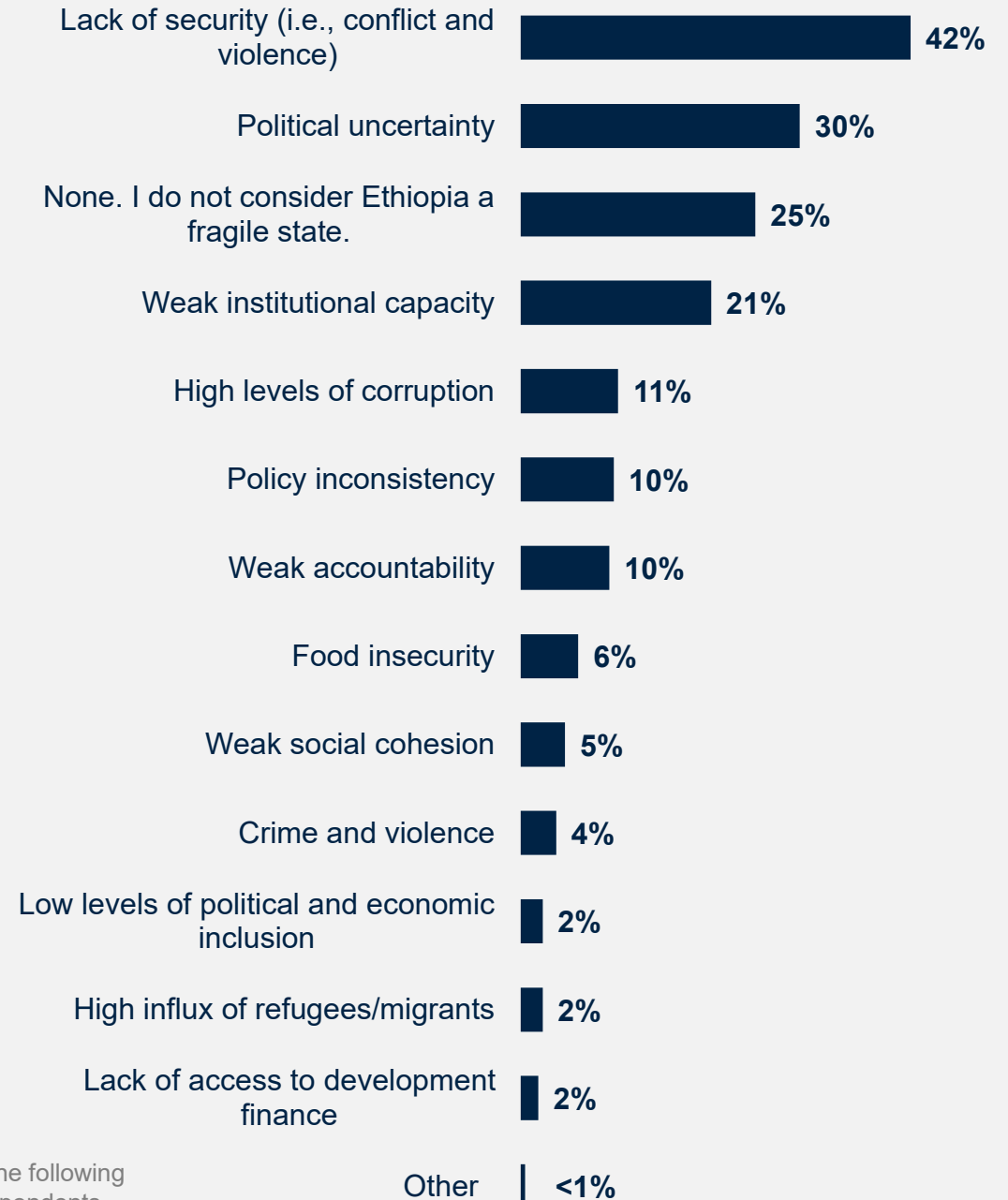
Characteristics of Ethiopia as a Fragile State


When asked about the characteristics of a fragile state, respondents pointed out lack of security and political uncertainty as Ethiopia’s main attributes of fragility. However, government-affiliated respondents, including respondents from the office of a parliamentarian, were less likely to agree that Ethiopia was a fragile environment, highlighting a divergence in perspectives between government officials and other stakeholders.

In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Ethiopia?

“A peaceful and stable Ethiopia is a prosperous Ethiopia. The World Bank should support the government and CSOs working on peacebuilding to ensure that guns are silenced. Thereafter, support the affected communities to get transitional justice to restore social cohesion & harmony. This will strengthen Ethiopia. The youthful population should be provided with opportunities to work and pay taxes.”

(Academia Respondent)



 When considering the characteristics of a fragile state, please identify which of the following best illustrates fragility in Ethiopia. (Choose no more than 2) (Percentage of Respondents, N=209)

Overall Attitudes toward the World Bank Group

“Have a stronger transparency and accountability framework in place ...”

(Government Institution Respondent)



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In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Ethiopia? (N=92)

Key Performance Indicators (KPIs) Improved Since FY18

In FY25, respondents rated the WBG significantly higher regarding its **relevance** and **effectiveness in achieving development results** in Ethiopia. The ratings of its **alignment with development priorities** in Ethiopia also improved compared to the FY18 Survey.

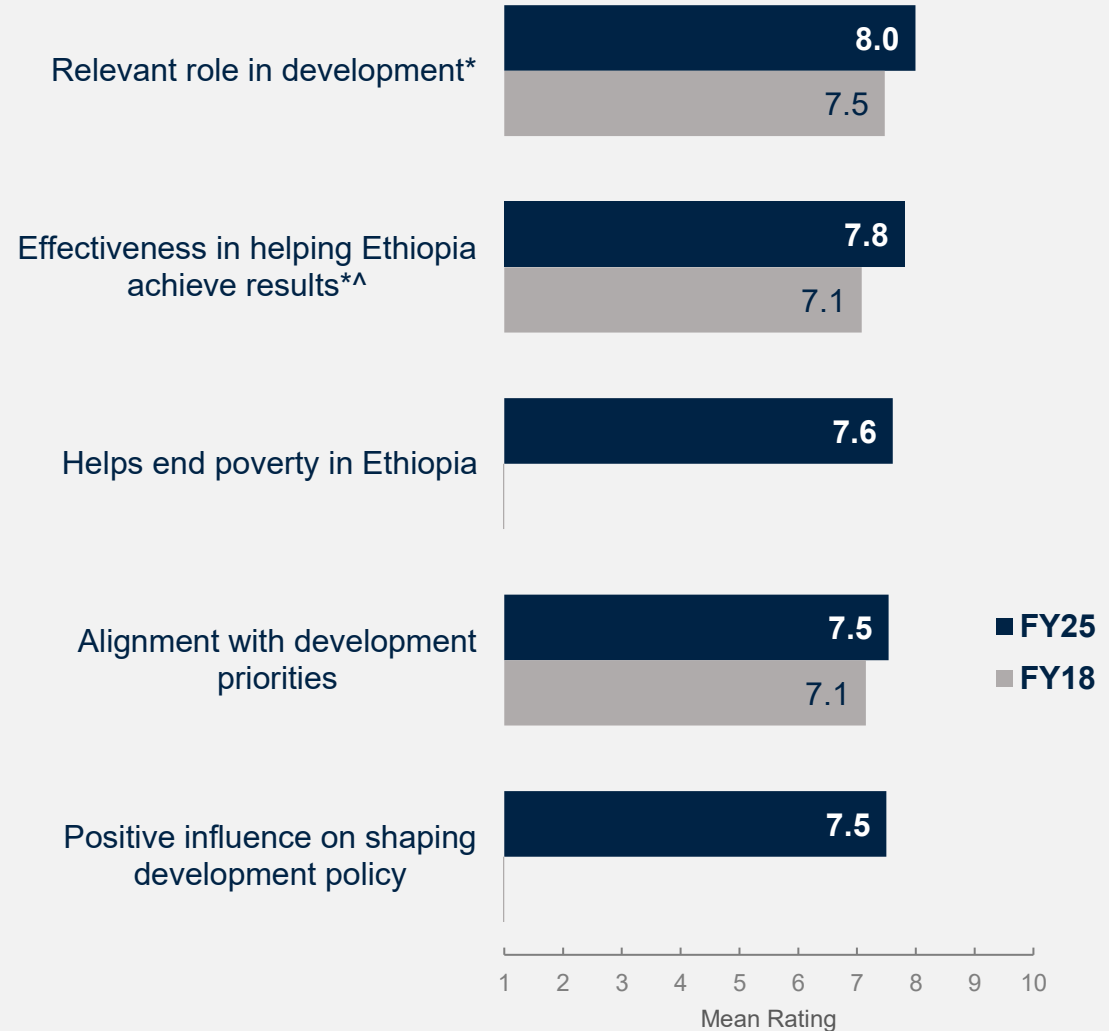
In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Ethiopia?

“To make sure World Bank Group financial resources (grants and loans) are used responsibly in line with its goals and objectives.”

(Private Sector Respondent)

“The WBG should intervene based on the real need, meaning a good assessment should be done to intervene accordingly. In addition, a strong M&E system should be in place.”

(Government Institution Respondent)



*Significant difference between years



The WBG currently plays a relevant role in development in Ethiopia. Scale: 1 Strongly disagree – 10 Strongly agree
 How effective is the WBG in helping Ethiopia achieve development results? Scale: 1 Not effective at all – 10 Very effective
 The WBG’s work helps end poverty in Ethiopia. Scale: 1 Strongly disagree – 10 Strongly agree
 The WBG’s work is aligned with what I consider the development priorities for Ethiopia. Scale: 1 Strongly disagree – 10 Strongly agree
 The WBG has a positive influence on shaping the development policy in Ethiopia. Scale: 1 Strongly disagree – 10 Strongly agree

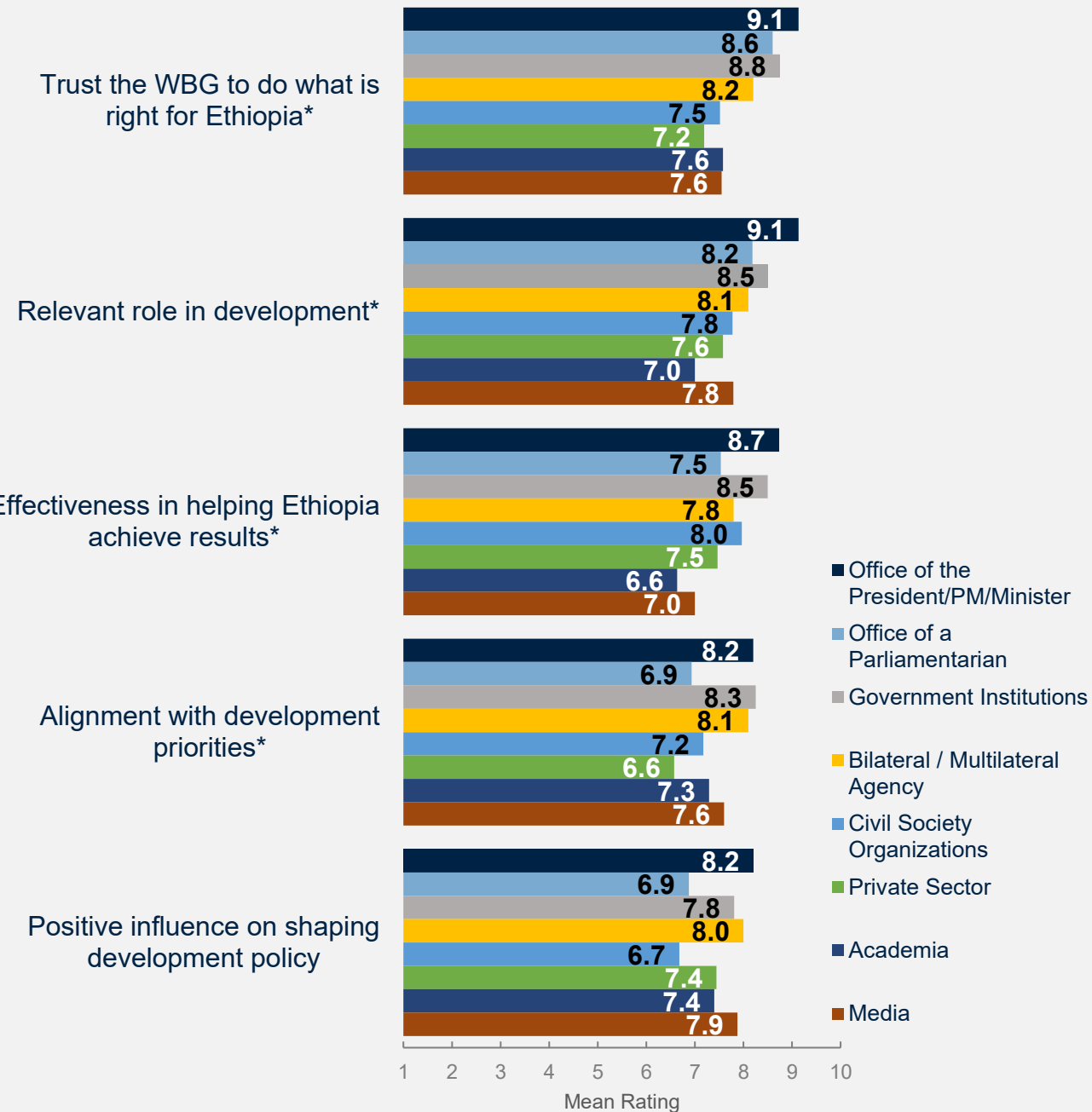
^Compared to a mean score of the two questions asked in FY18: "Overall, please rate your impression of the WBG’s effectiveness in Ethiopia. Scale: 1 Not effective at all – 10 Very effective; To what extent does the WBG’s work help to achieve development results in Ethiopia? Scale: 1 To no degree at all – 10 To a very significant degree



High-Level Government Officials are Most Positive about WBG's Work

Comparisons of ratings for key performance indicators among stakeholder groups show that respondents from the office of the President/PM/Minister and respondents from government institutions, on average, gave more positive ratings.

In contrast, respondents from the **private sector** and **academia** were more critical in some questions. Notably, the private sector respondents rated WBG's alignment with development priorities significantly lower, and academia respondents rated WBG's relevance and effectiveness in helping Ethiopia achieve results significantly lower than other respondents.

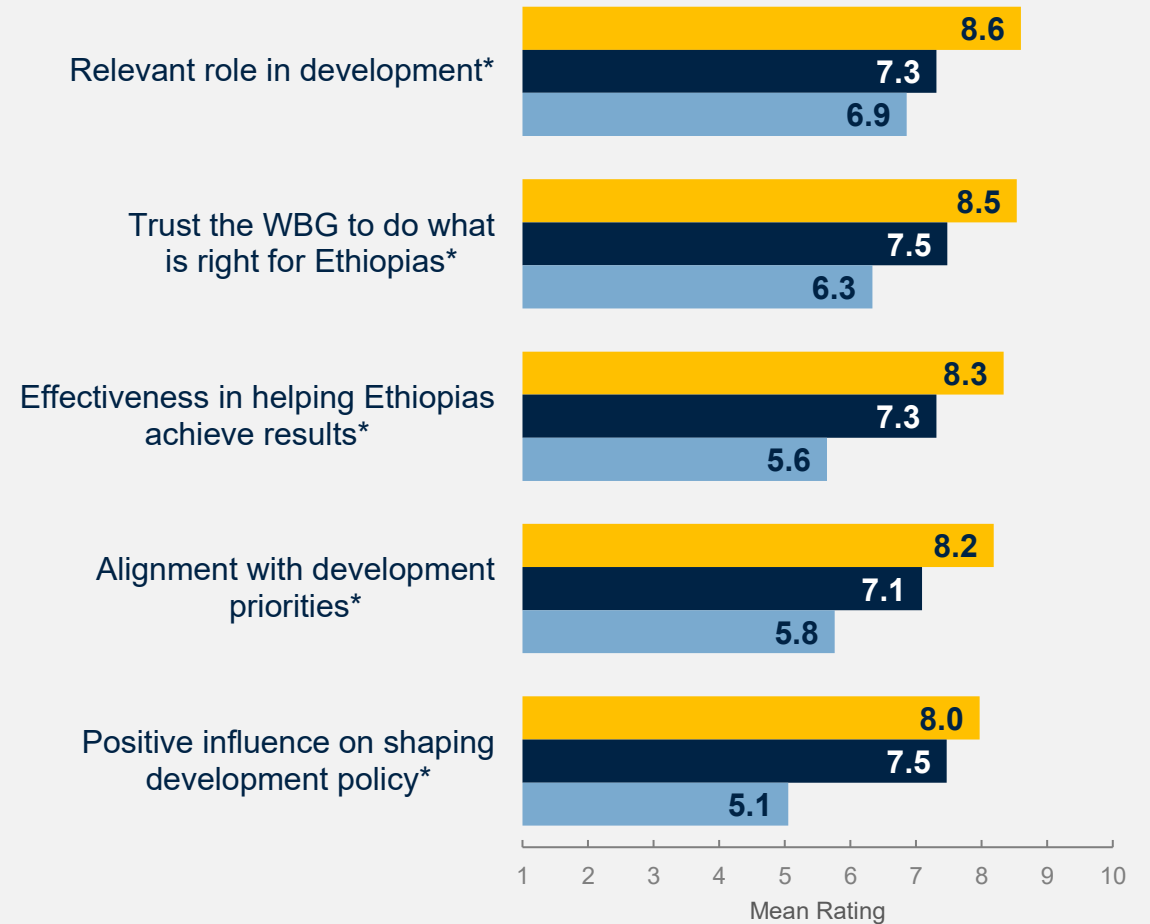


*Significant difference between groups

Familiarity Leads to More Positive Perceptions

Comparing ratings of key performance indicators among respondents highly familiar with the WBG (ratings of 8-10 on a 10-point scale) and those with little familiarity with the WBG (ratings of 1-4 on a 10-point scale), one can see that the more familiar stakeholders are with the WBG, the more positive their perceptions of it and its work are.

Meaningful engagement and outreach can continue to increase positive perceptions.



How familiar are you with the work of the WBG in Ethiopia?

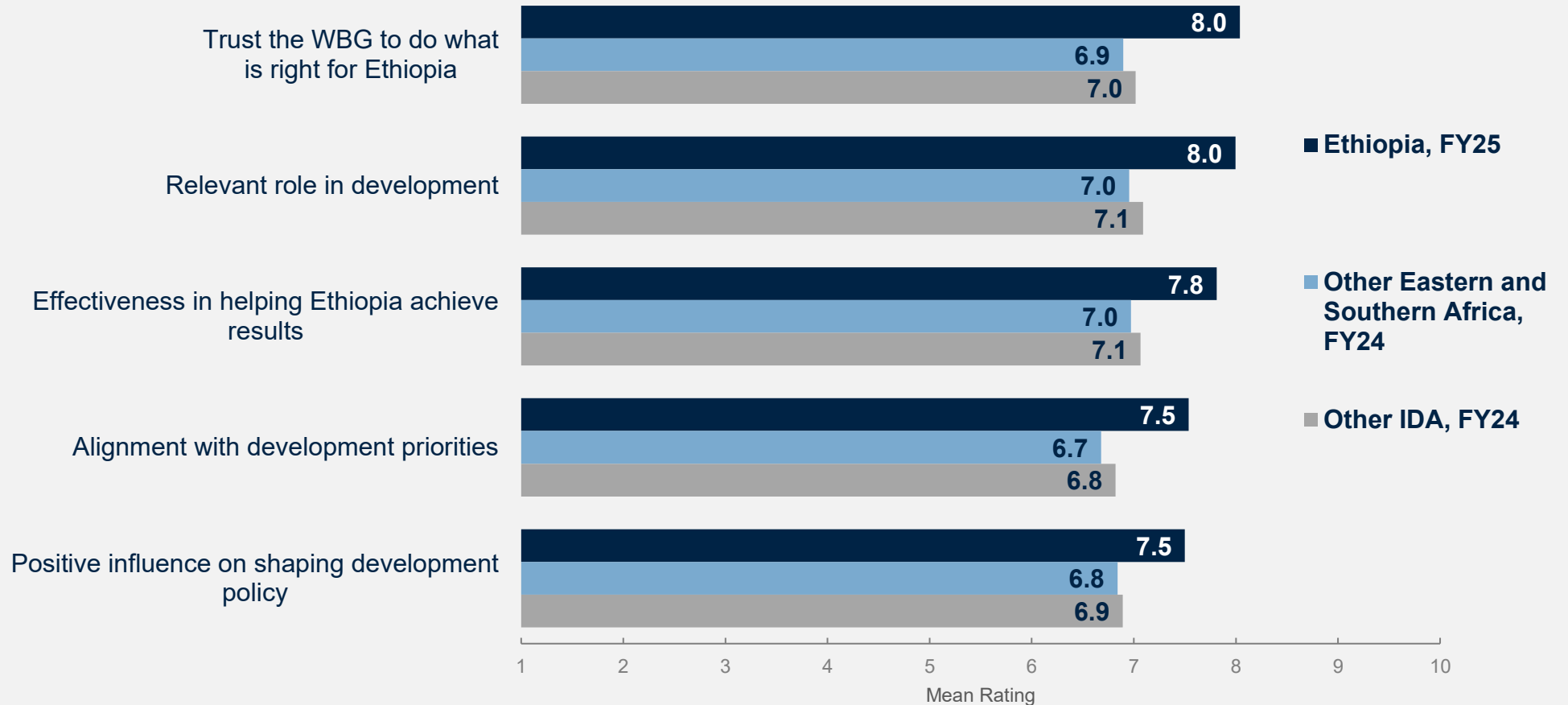
■ High Familiarity (8-10) ■ Some Familiarity (5-7) ■ Low Familiarity (1-4)



The WBG currently plays a relevant role in development in Ethiopia. Scale: 1 Strongly disagree – 10 Strongly agree
 The WBG has a positive influence on shaping the development policy in Ethiopia. Scale: 1 Strongly disagree – 10 Strongly agree
 How much do you trust the WBG to do what is right for Ethiopia? Scale: 1 Not at all – 10 Very much
 How effective is the WBG in helping Ethiopia achieve development results? Scale: 1 Not effective at all – 10 Very effective
 The WBG’s work is aligned with what I consider the development priorities for Ethiopia. Scale: 1 Strongly disagree – 10 Strongly agree

*Significant difference between levels of familiarity

Ethiopia's Key Performance Indicators were Higher than those of Other Eastern and Southern African Countries and other IDA Countries Surveyed in FY24

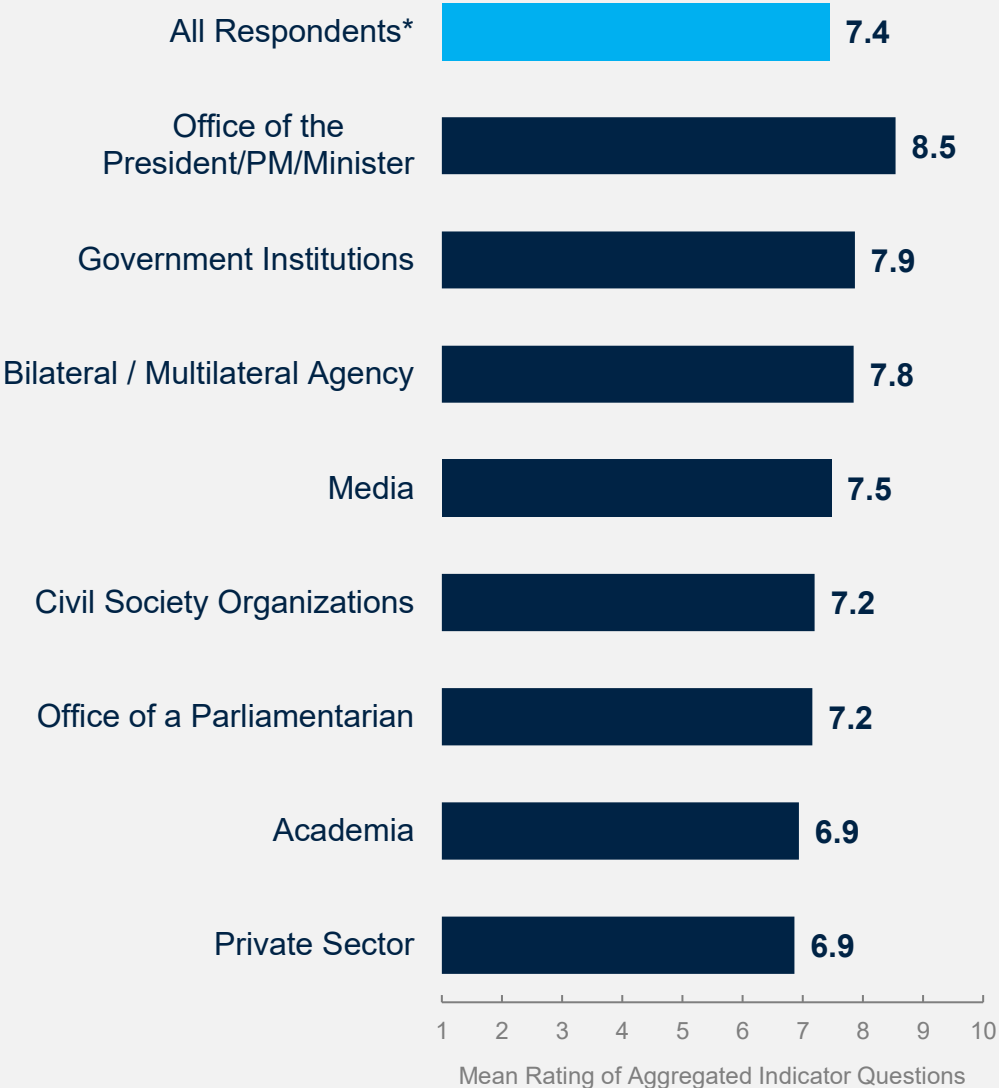


Stakeholder Trends Across Performance Indicators

Respondents from the office of the **President/PM/Minister** had the highest mean ratings across the aggregated responses to the nineteen COS indicator questions. In contrast, respondents from **academia** and the **private sector** reported lower ratings.

- **Collaboration with the WBG:** Respondents who indicated that they collaborate with the WBG gave significantly higher ratings across the aggregated indicator questions compared to respondents who did not collaborate with the WBG:

Mean rating: **Collaborate with WBG = 7.7**
 Do not collaborate = 7.1



*Significant difference between stakeholder groups



World Bank Group's Support for Development Areas

"Focus on strategic projects implementation support, especially irrigation, infrastructure, agriculture, and energy."

(Respondents from the office of the President, PM, or Minister)



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In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Ethiopia? (N=92)

Development Areas for the WBG Focus

In FY25, a majority of stakeholders prioritized **agriculture and food security** as the key focus for WBG resources, with support for this area doubling compared to the FY18 survey (34%).

Private sector development and **digital infrastructure development** have become higher priorities, with support increasing from 17% and 3% in FY18 to 40% and 30% in FY25, respectively.

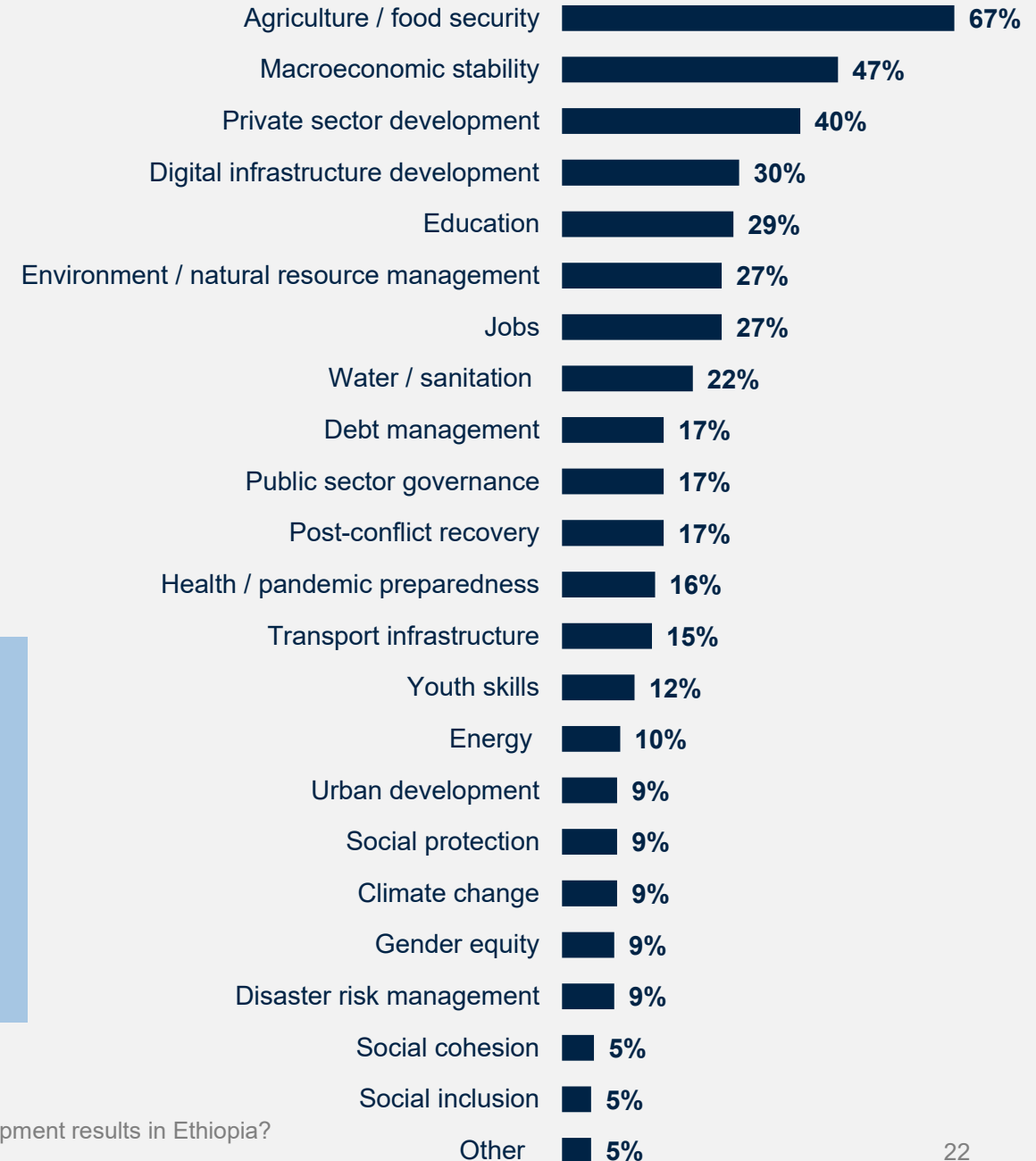
In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Ethiopia?

“The WBG should prioritize investments in resilient infrastructure and sustainable agriculture to mitigate the impacts of climate change and recurring droughts.”

(Respondents from the office of the President, PM, or Minister)

“To work on security and political stability.”

(Private Sector Respondent)



Which areas should the WBG prioritize to have the most impact on development results in Ethiopia? (Select up to 5) (Percentage of Respondents, N=203)

Areas for the WBG to Lead Among Other Partners in Ethiopia

Almost half of the respondents believed the country would benefit most from the WBG taking a leading role among international partners in **human capital development**, including education, health, and social protection. **Food security** ranked as the second most important priority.

In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Ethiopia?

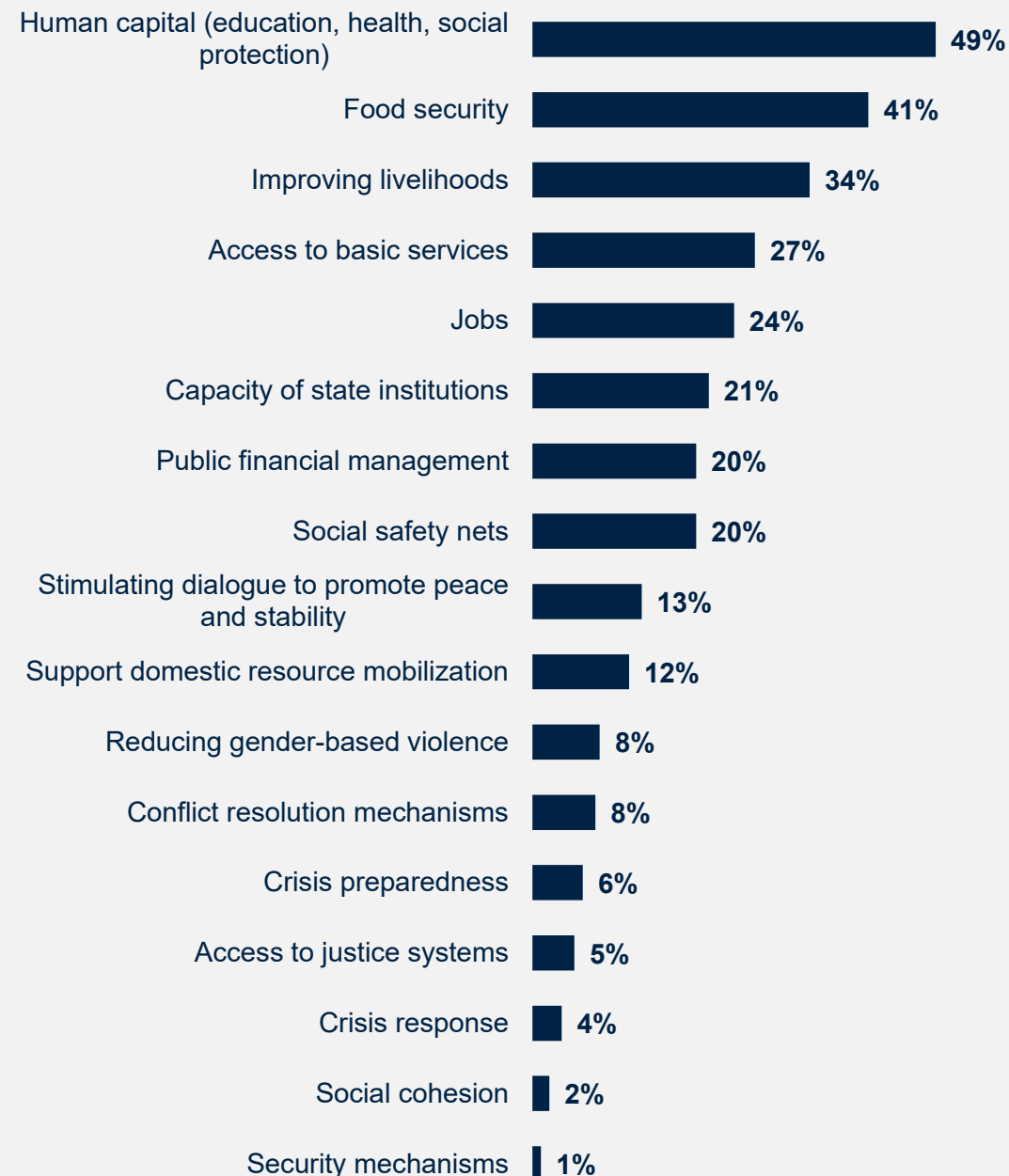
“To engage in development initiatives like:

- Projects like dams*
- Education system support”*

(Private Sector Respondent)

“Support in education”

(Media Respondent)

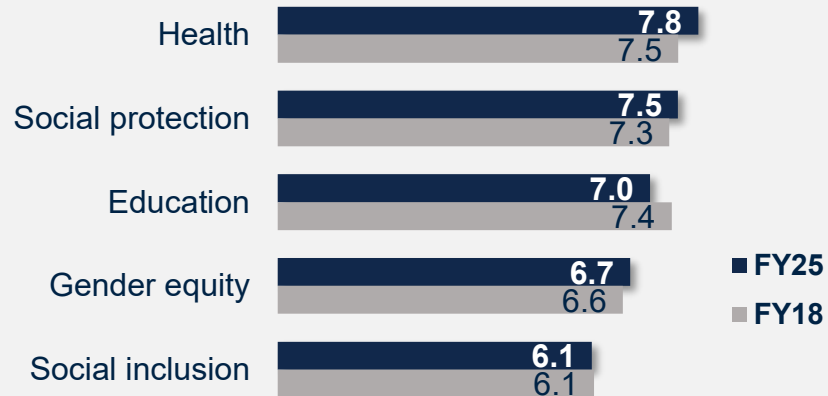


Which THREE areas below would benefit most from the World Bank Group playing a leading role among international partners in Ethiopia? (Choose no more than 3) (Percentage of Respondents, N=196)

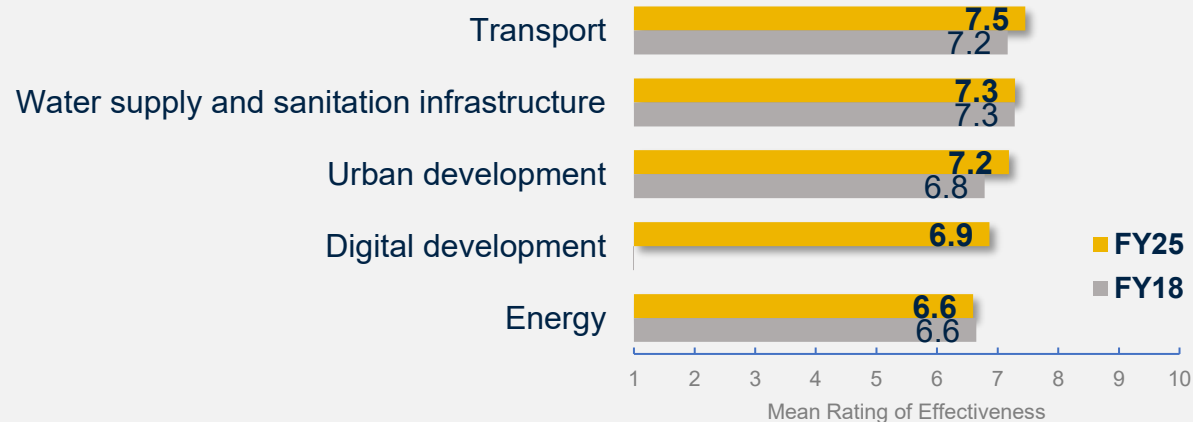
Positive Trend in Perceptions of Effectiveness of WBG's Support

The WBG's work in **health, transport, and agriculture and food security** received the highest effectiveness ratings. Respondents' ratings for most areas have increased compared to FY18, and they increased significantly in **regional integration, private sector development, trade, agriculture and food security, climate change, and environment / natural resource management**.

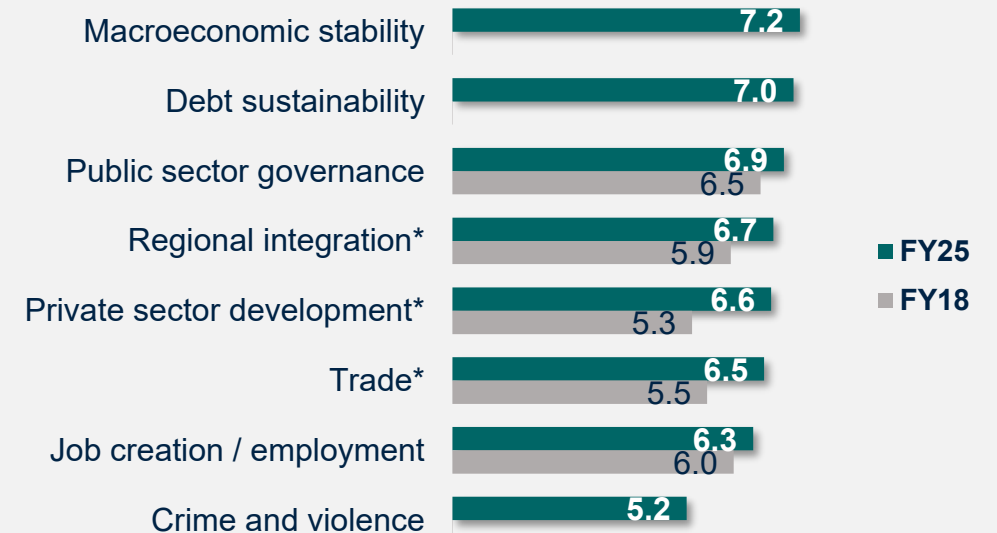
Human Development



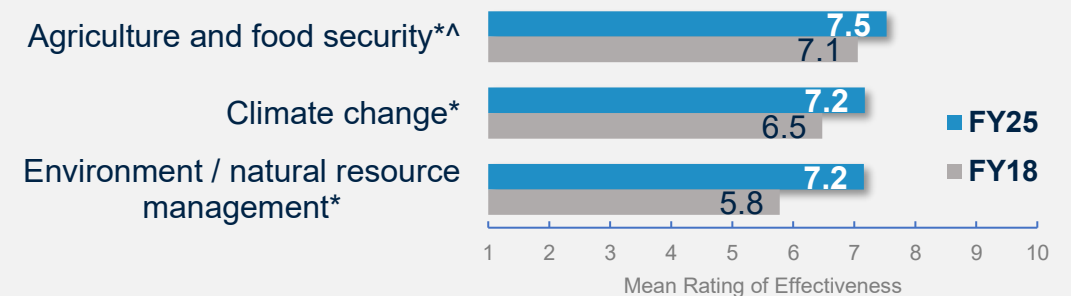
Infrastructure



Finance / Institutions / Economic Growth



Environmental Sustainability



How **effective** has the WBG been at achieving development results in each of these areas in Ethiopia? Scale: 1 Not effective at all – 10 Very effective

^ Compared to a mean score of "Agriculture and rural development" and "Food security" asked in FY18.

*Significant difference between years

World Bank Group's Engagement on the Ground in Ethiopia

“Engage local councils in determining the needs of the citizens and focus on implementing actions that will have significant results or impacts on society.”

(Respondents from the office of the President, PM, or Minister)



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In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Ethiopia? (N=92)

The WBG is Recognized as a Long-Term, Effective Development Partner

In FY25, respondents continued to view the WBG as a **long-term partner** to Ethiopia. Perceptions of the institution’s **responsiveness** and **openness** in sharing data and information were also rather positive.

Compared to FY18, respondents gave significantly higher ratings for the WBG’s **flexibility when circumstances change**. However, ratings for accessibility and flexibility remained relatively moderate.

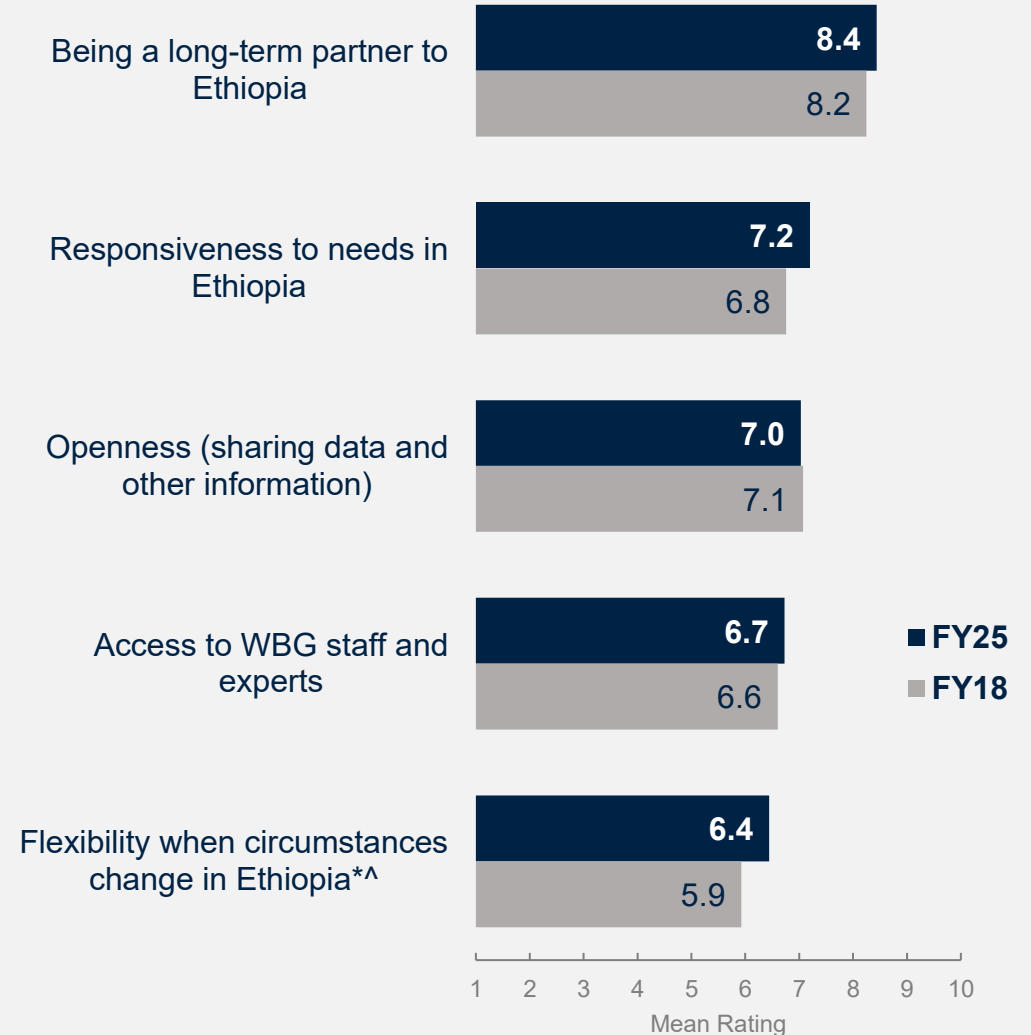
In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Ethiopia?

“The projects funded by the WBG have to be tailor-based and should focus on the sustainability of the projects through engagement of the community. In the project’s implementation phase, it needs to establish systematic monitoring and evaluation of institutional capacity, particularly at the local government levels of structure.”

(Government Institution Respondent)

“Better and genuine collaboration with other development partners in planning and aligning programmes. Increased interaction with government counterparts also at regional levels.”

(Bilateral or Multilateral Respondent)



*Significant difference between years

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

^Compared to the mean of institutional flexibility and flexibility to changes in the country context asked in FY18.



The WBG Seen as Effectively Collaborating with the National Government and Other Donors and Partners

In FY25, respondents perceived the WBG as most effective in collaborating with the **national government** and **other donors and development partners**; both ratings have improved significantly.

Perceptions of the WBG’s collaboration with the private sector and civil society have also improved significantly since FY18.

At the same time, ratings of the Bank’s collaboration with **local government** and the **parliament** were more moderate.

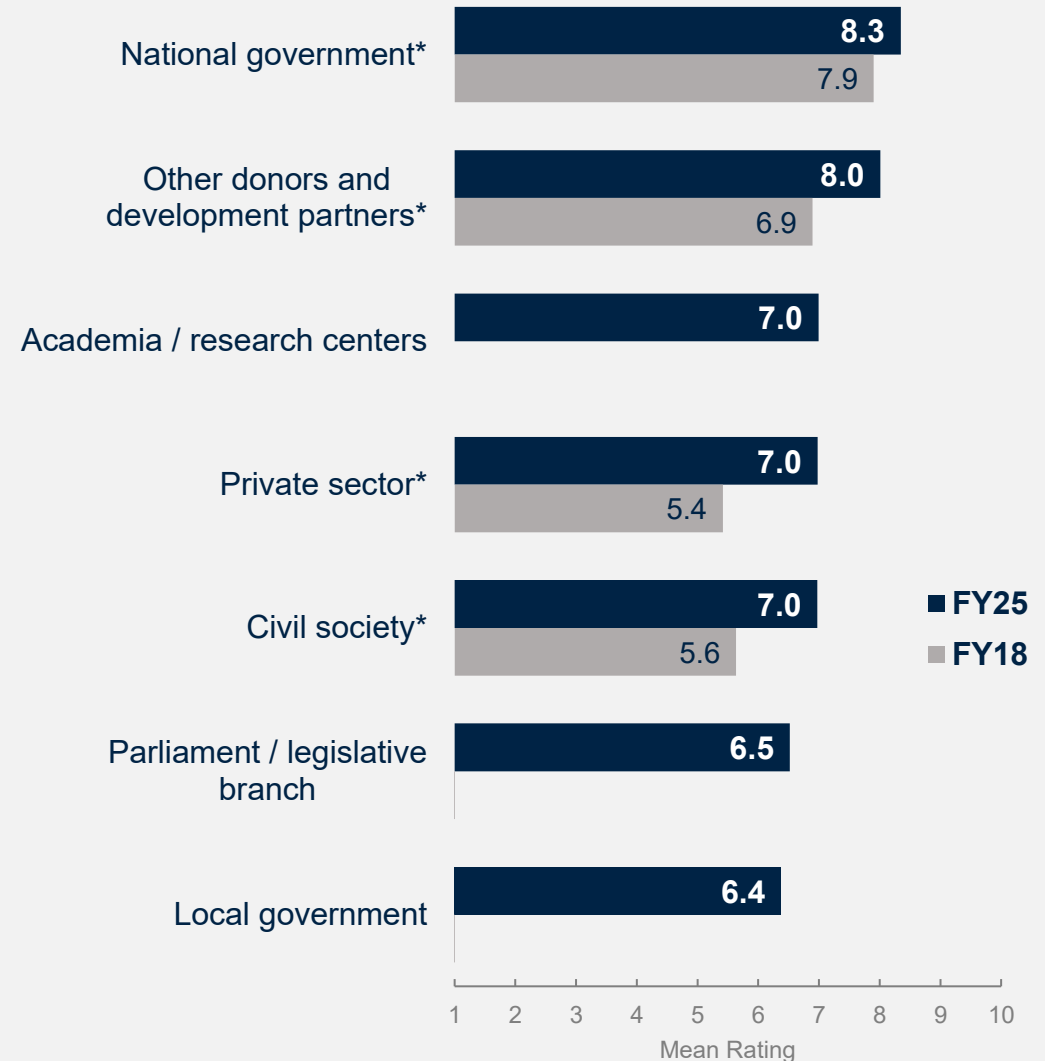
In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Ethiopia?

“... Strengthening local partnerships by working closely with Ethiopian government agencies, local NGOs, and community-based organizations...”

(Academia Respondent)

“I think the WBG will have more impact if it also balances the support to the local community programs rather than investing mostly in the national government programs. The program on social accountability, though it was a very small investment compared to government programs, has created an impact by empowering the local actors to question/demand the counter government offices.”

(Civil Society Respondent)



*Significant difference between years



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

Stakeholders Want the Bank to Collaborate More with the Private Sector

More than half of respondents in this year's survey indicated that the WBG should collaborate more with **the private sector** in addition to its partnership with the national government. Respondents also wanted to see the WBG collaborate more with **civil society** and **local government**.

In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Ethiopia?

"I think it is key for the bank to foster greater involvement of local communities in order to be more effective. This includes consulting with stakeholders to ensure that initiatives align with local needs and priorities."

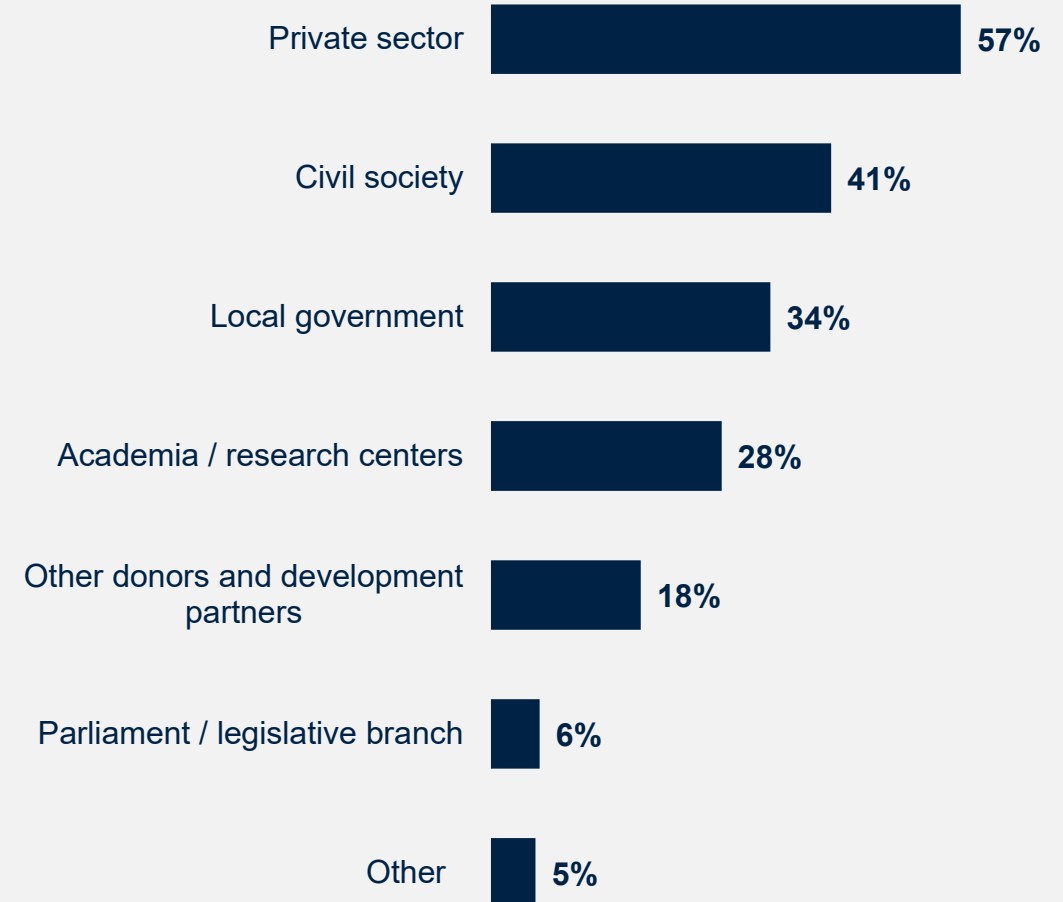
(Bilateral or Multilateral Respondent)

"... A clear road map for the domestic and foreign private sector to engage in food production and mineral development."

(Academia Respondent)

"The role of the private sector has been undermined, and closely working with the private sector will be a game-changer for WBG to achieve its objective in Ethiopia."

(Private Sector Respondent)



In addition to its partnership with the National government, which of the following should the WBG collaborate with more to have greater impact in Ethiopia? (Select up to 2) (Percentage of Respondents, N=203)



World Bank Group's Financial Instruments and Knowledge Work

"Focus on significant funding investments on environmental sustainability, landscape restoration, and creation of arable/alternative livelihoods for rural poor households; strong collaboration with and financial support to NGOs that are engaged in conservation works yet suffering from a shortage of finance."

(Civil Society Respondent)

"Mobilizing development financing and making the government accountable for its spending."

(Bilateral or Multilateral Respondent)



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In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Ethiopia? (N=92)

Respondents Identify Financial Resources as the Bank's Greatest Value in Ethiopia

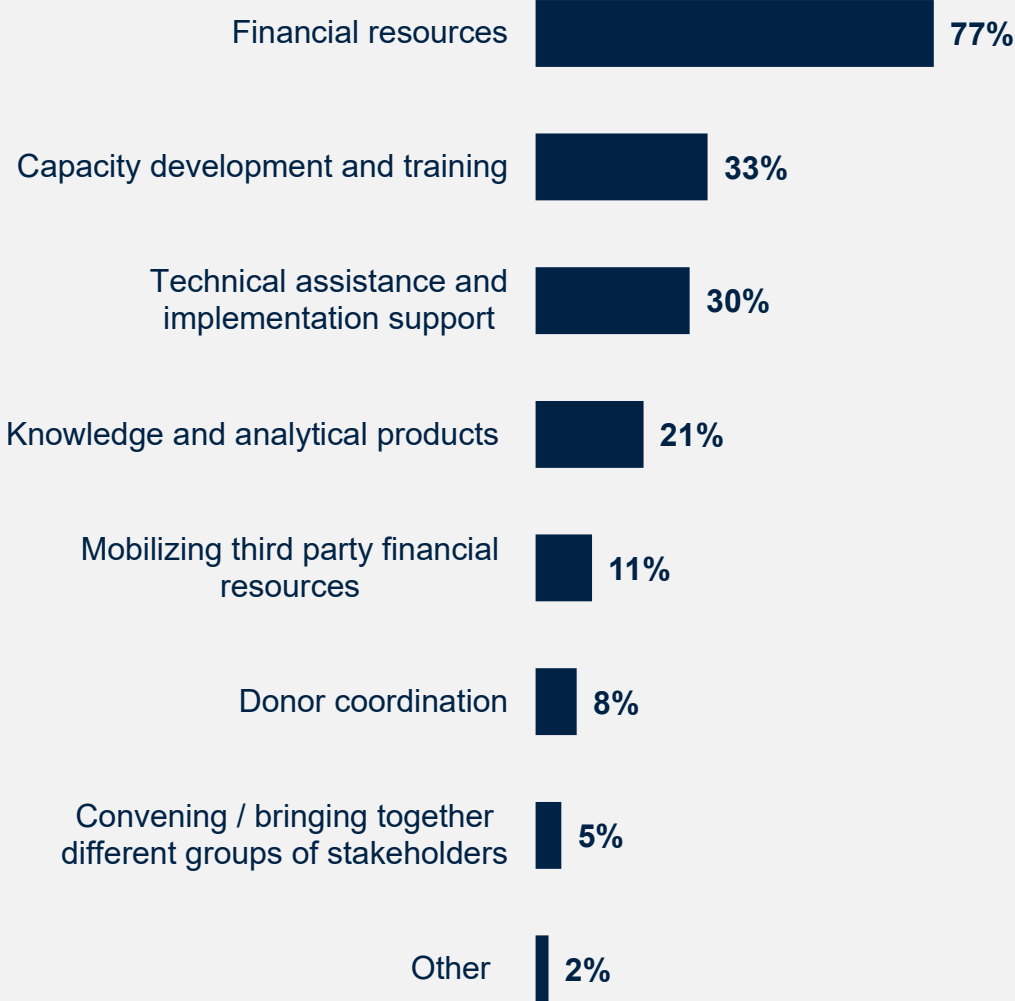
Over three-quarters of respondents identified **financial resources** as the WBG's greatest value in Ethiopia. Additionally, one-third of respondents recognized the WBG's capacity development and technical assistance as valuable activities.

In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Ethiopia?

“Align resource allocations with institutional capacity development efforts.”
(Bilateral or Multilateral Respondent)

“Enhancing data and evidence-based decision making by investing in data collection and analysis.”
(Academia Respondent)

“Timely response to the Country's critical financial and other needs. Keep independence from any Country's political influence and evaluate the country's needs.”
(Government Institution Respondent)



The WBG is Recognized for Insisting on Accountability in its Lending Practices

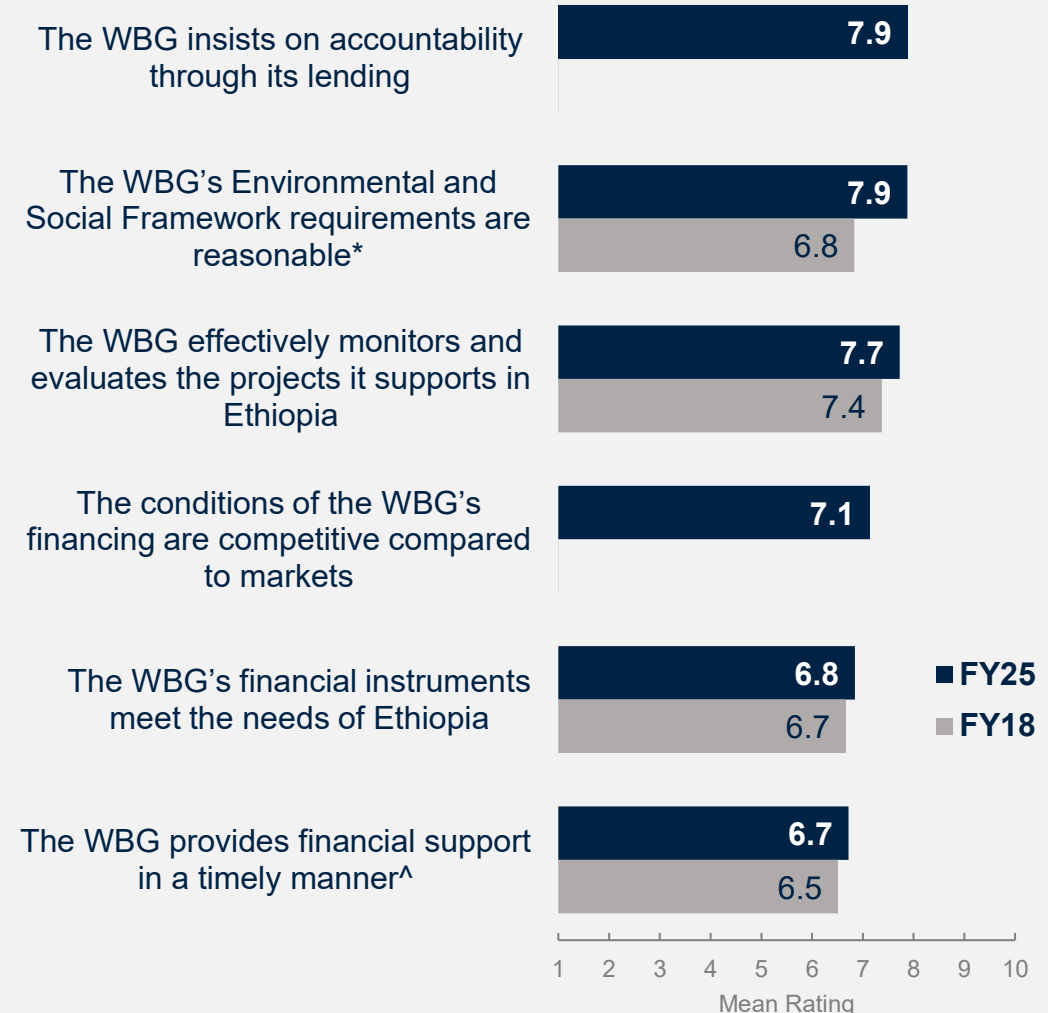
Respondents hold positive views of the WBG’s financial instruments, as they reported the highest rating for the WBG’s insistence on accountability through its lending. Moreover, perceptions of the WBG’s **Environmental and Social Framework (ESF)** requirements have improved significantly compared to FY18.

- While media respondents tended to be most critical across all aspects, respondents from the office of a parliamentarian and academia were the least likely to agree that WBG’s financial instruments meet Ethiopia's needs (mean = 5.6). Respondents from the private sector gave the lowest ratings for the timeliness of WBG’s financing (mean = 5.4).

In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Ethiopia?

“... Enhancing financial access for vulnerable groups by supporting financial inclusion initiatives and facilitating public-private partnerships...”

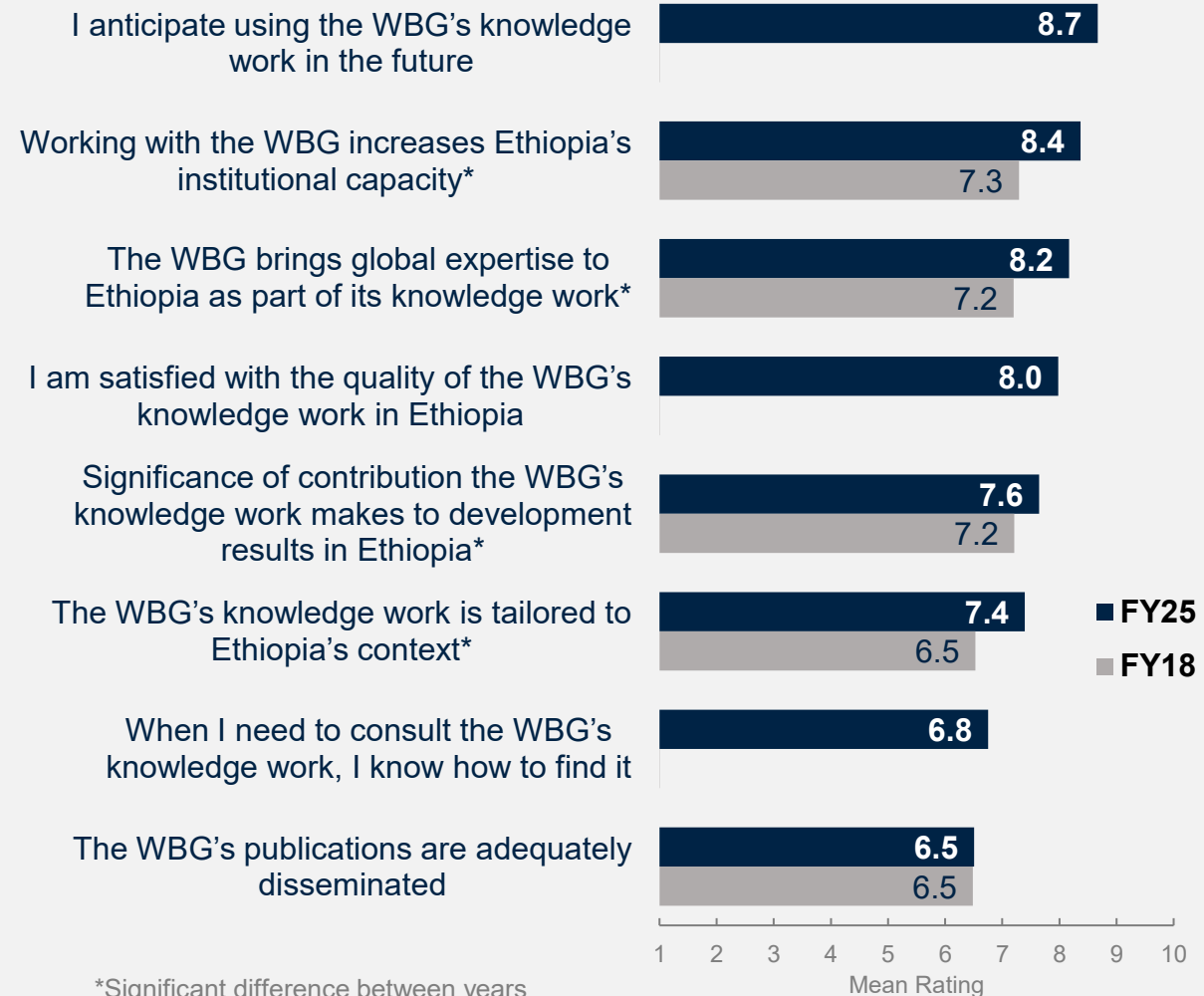
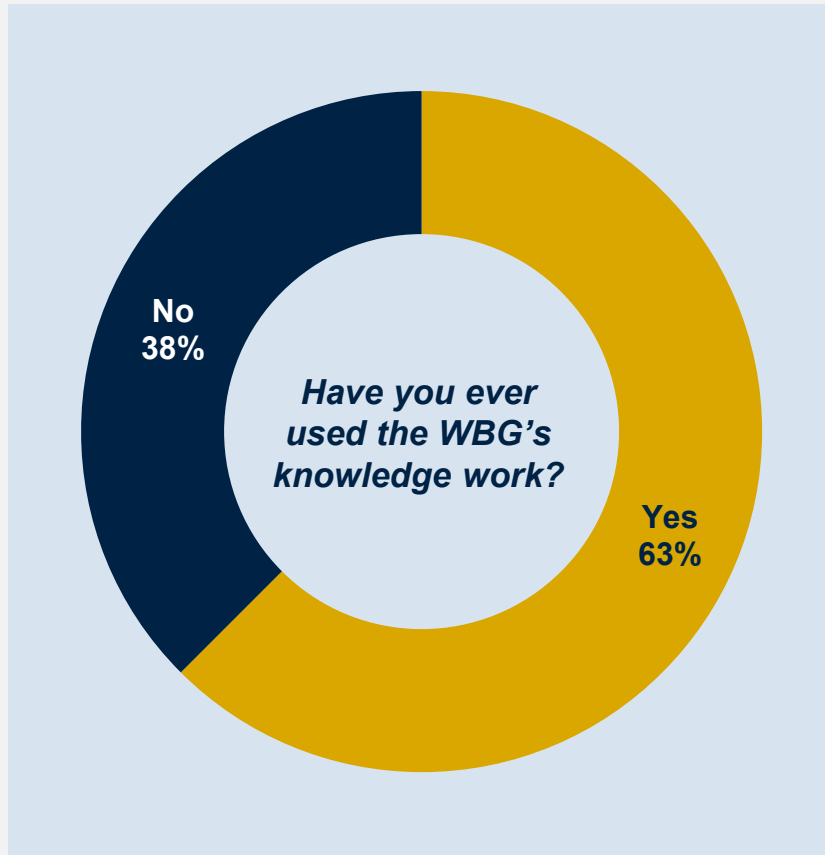
(Academia Respondent)



*Significant difference between years



63% of Respondents Used the WBG's Knowledge Work, with Significantly Improved Perceptions



The Future Role of the World Bank Group in Ethiopia

“Building trust with the government, identifying felt needs of the government that can benefit the local community, balancing between the best experiences the WB can bring in and the actual demand of the local government, creating a clear understanding of the development tools being introduced/expanded by the WB are a few among many.”

(Government Institution Respondent)



WORLD BANK GROUP



In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Ethiopia? (N=92)

How can the Bank increase its effectiveness? Open-Ended Responses

*Engage more with local stakeholders to align with the country's needs;
Enhance monitoring and oversight of the project and provide regular updates.*



Focus Area 27%

- Expand investments in education and improve workforce skills and job opportunities.
- Support social protection programs, youth employment, and healthcare access.
- Promote peacebuilding initiatives by engaging civil society and local stakeholders.
- Invest in environmental sustainability, landscape restoration, and alternative livelihoods to mitigate the effects of climate change and foster long-term economic resilience.

Engagement 24%

- Prioritize engagement with grassroots organizations to ensure development initiatives align with local needs.
- Expanding direct partnerships with local governments and NGOs will enhance project sustainability and accountability.
- Closer coordination with the private sector to drive economic growth, job creation, and innovation.

Knowledge 13%

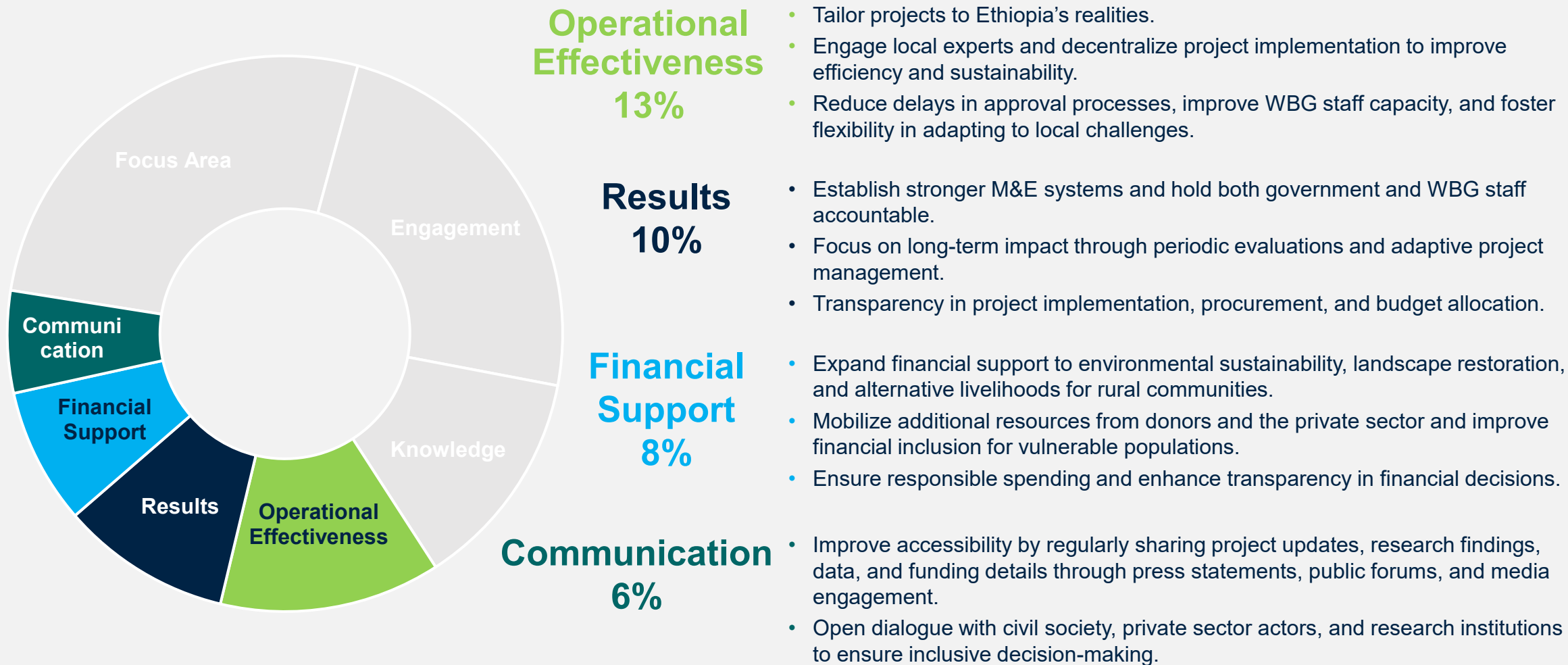
- Invest in data collection, research, and analytics to support informed policymaking and program implementation.
- Focus on training government officials, the private sector, and local organizations to enhance governance and project implementation.
- Support digitalization, infrastructure development, and economic resilience through knowledge-sharing initiatives.



In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Ethiopia? (N=92)

How can the Bank increase its effectiveness? Open-Ended Responses

*Engage more with local stakeholders to align with the country's needs;
Enhance monitoring and oversight of the project and provide regular updates.*



In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Ethiopia? (N=92)

Communication and Outreach

“Stay neutral in the shifting geopolitical wind, ensure reasonable independence and trust in the relationship with state actors/policymakers, and focus on long-term grassroots projects that focus on livelihoods such as health, education, and social security. Be more assertive and engage, and leverage relationships with the media to disseminate knowledge work.”

(Media Respondent)



WORLD BANK GROUP



In your opinion, what is the most important thing the WBG could do to increase its effectiveness in Ethiopia? (N=92)

The WBG Website and Events are the Most Preferred Ways for Receiving WBG Communication

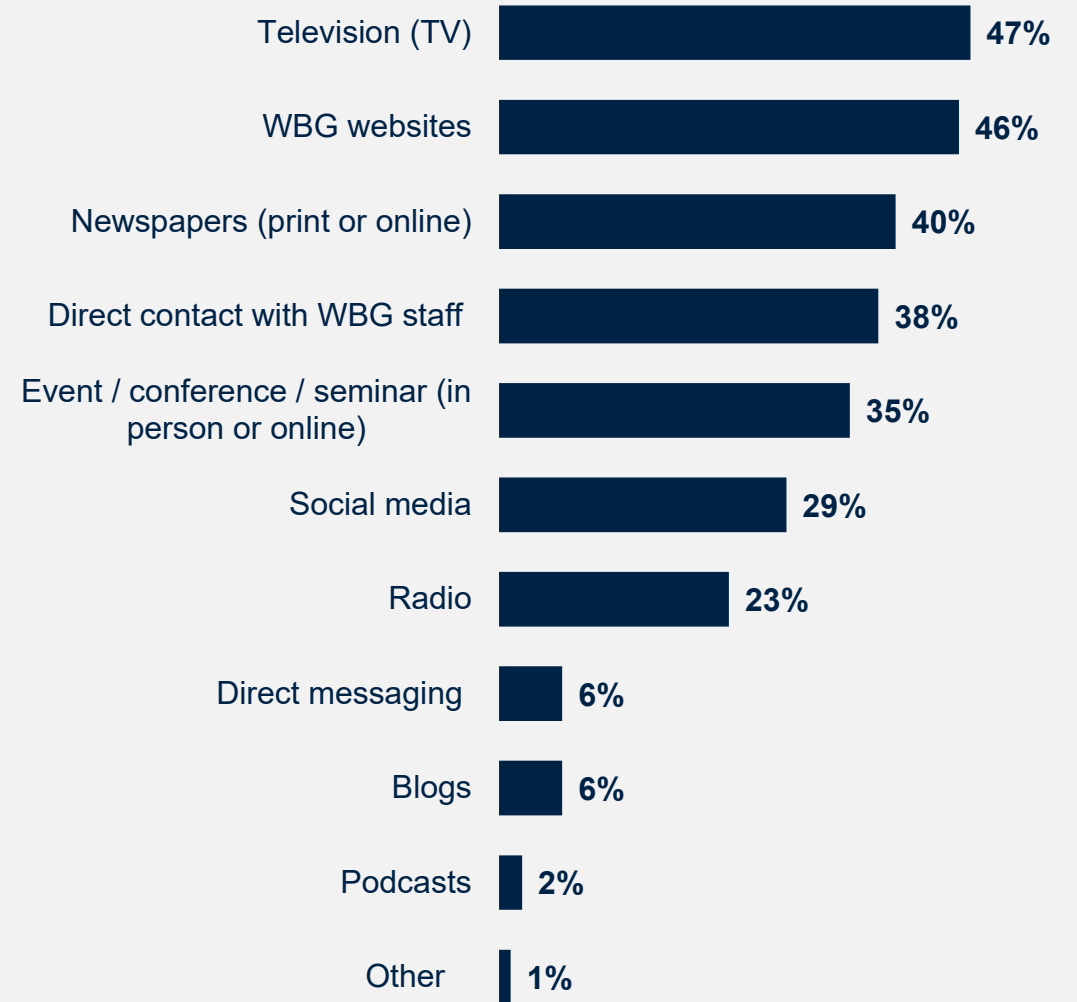
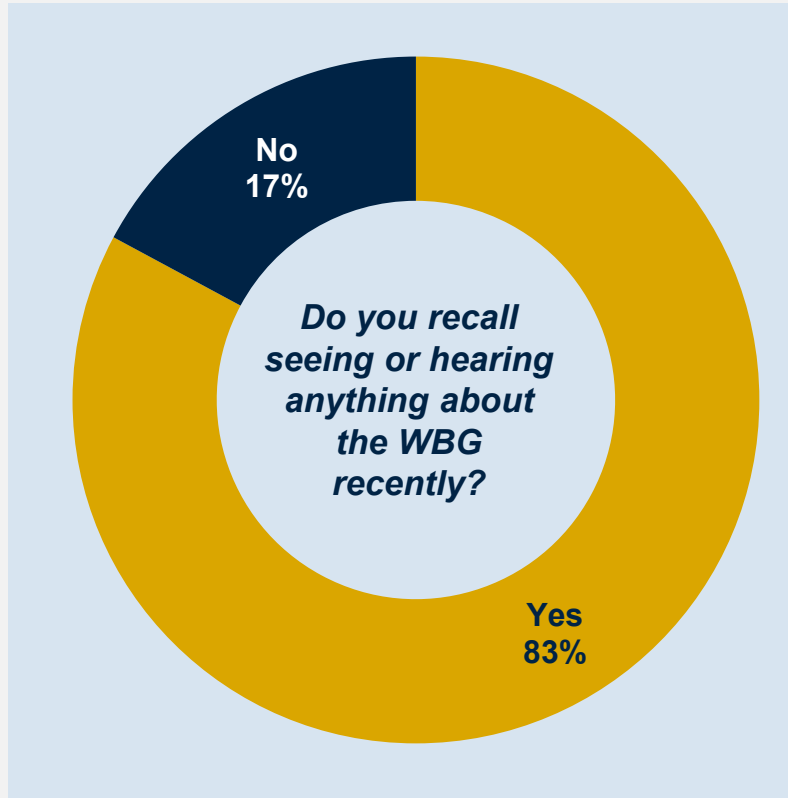
Respondents most preferred receiving WBG communications through the **WBG website** or by attending **events, conferences, seminars, and workshops** (in person or online). However, preferences varied significantly between stakeholder groups: respondents from the office of the President/PM/Minister and government institutions favored direct contact with staff.

| | All Respondents | Office of the President/PM/Minister | Office of a Parliamentarian | Government Institutions | Bilateral / Multilateral Agency | Civil Society Organizations | Private Sector | Preferred WBG Channel | |
|---|-----------------|-------------------------------------|-----------------------------|-------------------------|---------------------------------|-----------------------------|----------------|-----------------------|-------|
| | | | | | | | | Academia | Media |
| WBG Website* | 56.7% | 33.3% | 70.6% | 45.3% | 55.6% | 64.7% | 78.1% | 56.0% | 50.0% |
| Event / conference / seminar / workshop (in person or online) | 55.8% | 40.0% | 41.2% | 52.8% | 66.7% | 70.6% | 56.3% | 60.0% | 50.0% |
| Direct contact with staff (e.g., in person, virtually, phone, email)* | 43.8% | 80.0% | 23.5% | 60.4% | 44.4% | 38.2% | 25.0% | 36.0% | 45.0% |
| Direct messaging (e.g., WhatsApp, Telegram, Viber) | 11.5% | 6.7% | 17.6% | 18.9% | 22.2% | 0.0% | 6.3% | 12.0% | 10.0% |
| Social media (e.g., Facebook, Twitter) | 6.7% | 13.3% | 5.9% | 3.8% | 0.0% | 0.0% | 6.3% | 16.0% | 10.0% |
| Other | 1.4% | 0.0% | 0.0% | 0.0% | 0.0% | 2.9% | 0.0% | 8.0% | 0.0% |



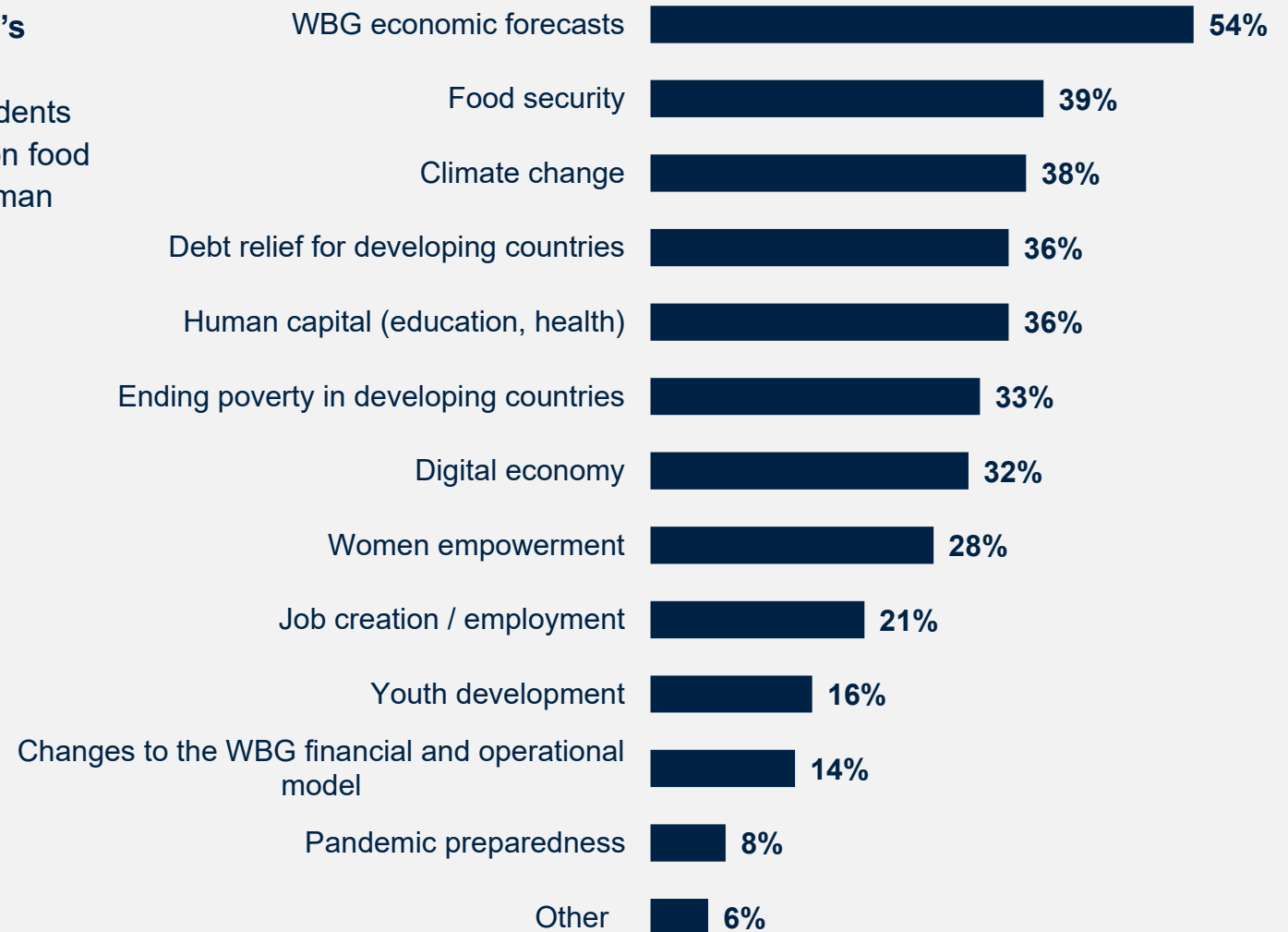
How would you prefer to receive communication from the WBG? (Select up to 2)
(Percentage of Respondents, N=208) *Significant difference between stakeholder groups

83% of Respondents Recalled Seeing Information about the WBG Recently, Most Often on Television and WBG Websites



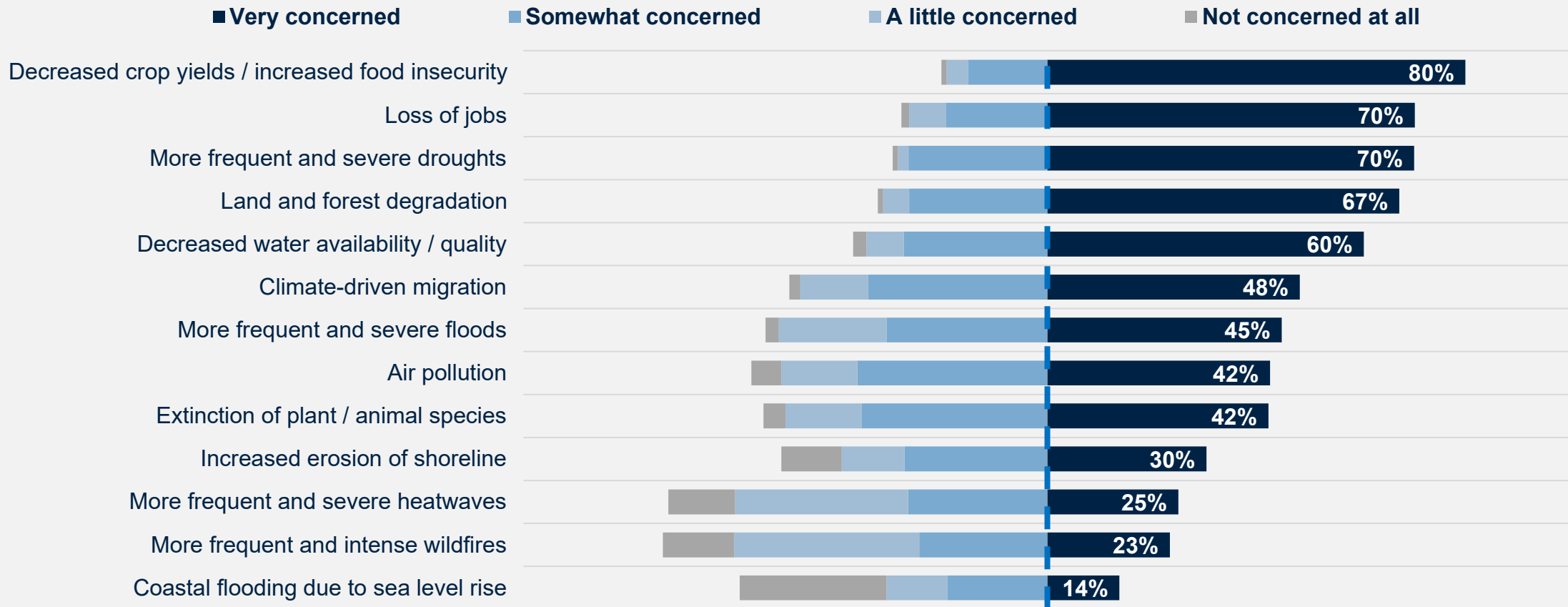
WBG's Economic Forecasts were Recalled Most Frequently

Respondents most frequently recalled **WBG's economic forecasts**, with more than half mentioning them. Over a third of the respondents recalled other topics, such as WBG's work on food security, climate change, debt relief, and human capital development.



Climate Change Communications can be More Impactful when Related to Food Security

The majority of respondents expressed deep concern about **decreased crop yield / increased food insecurity** regarding the potential impacts of climate change in Ethiopia. Additionally, 70% of respondents expressed concern about the **loss of jobs** and **more frequent and severe droughts**. These critical issues should be prioritized in communications to ensure that messaging about climate change resonates effectively.



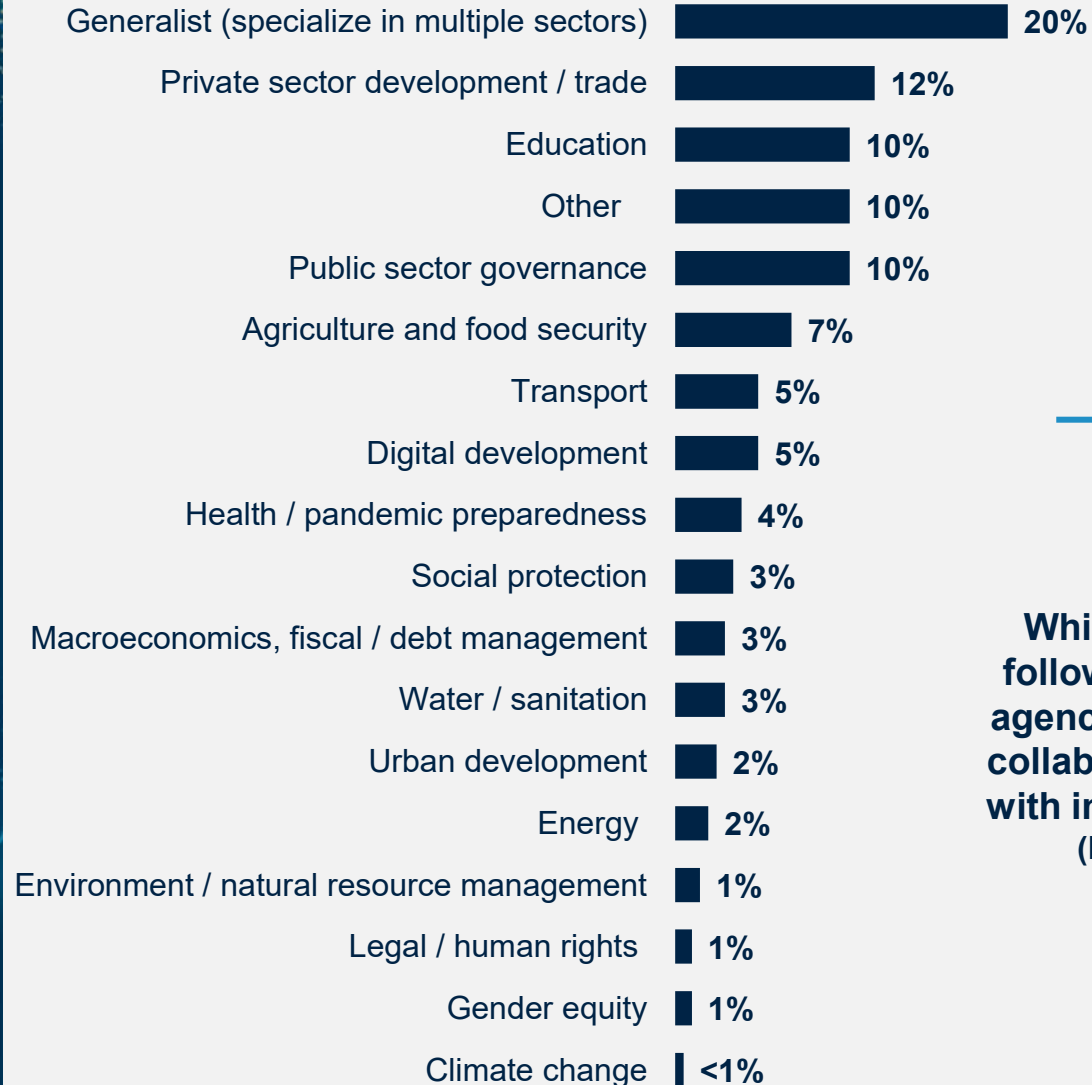
How concerned are you about the following potential impacts of climate change in Ethiopia?
(Percentage of Respondents, N=~194)

Sample Demographics and Detailed Methodology

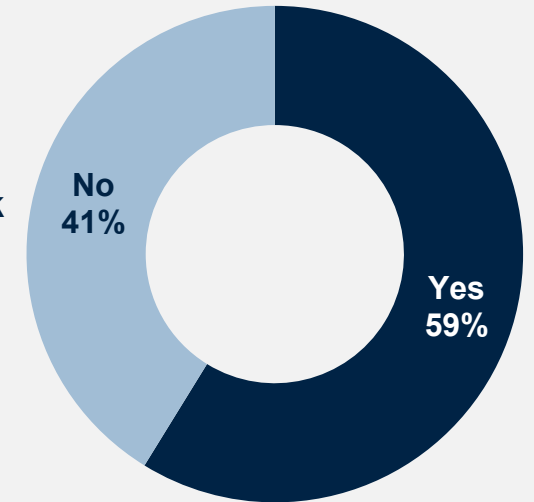


Sample Demographics

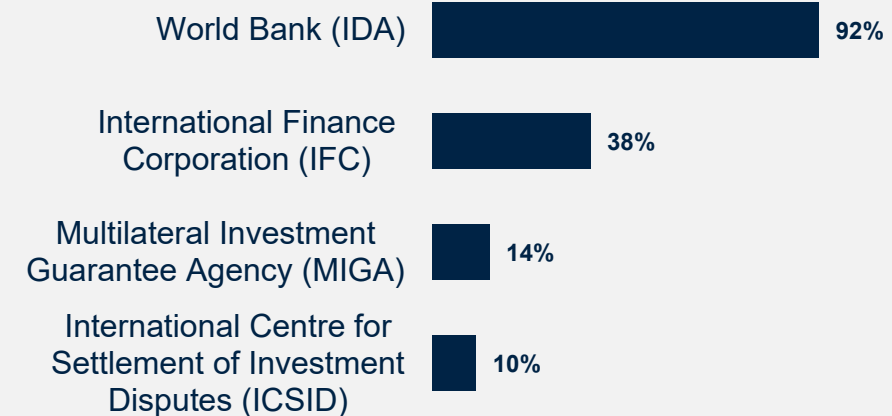
What is the primary specialization of your work? (N=205)



Do you collaborate/work with the World Bank Group (WBG) in Ethiopia? (N=216)



Which of the following WBG agencies do you collaborate/work with in Ethiopia? (N=125)

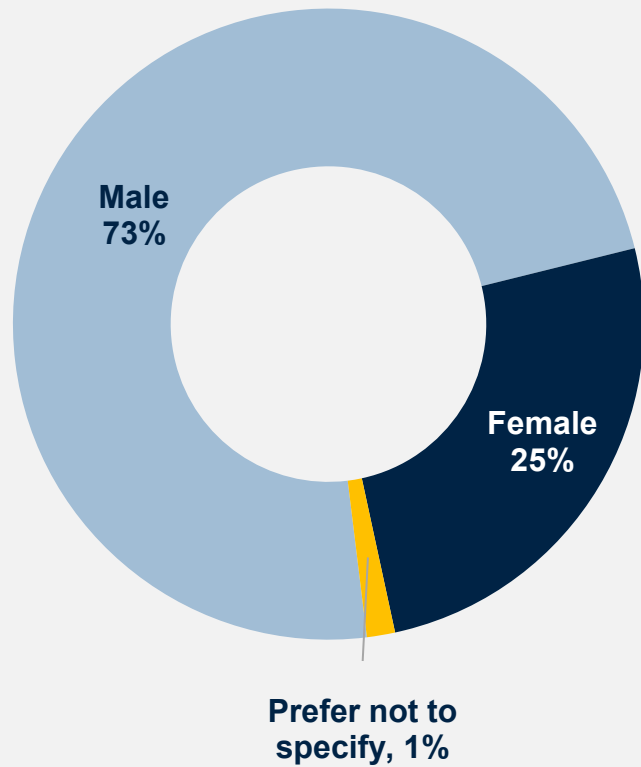


Percentages equal more than 100% because respondents could choose multiple agencies within the WBG.

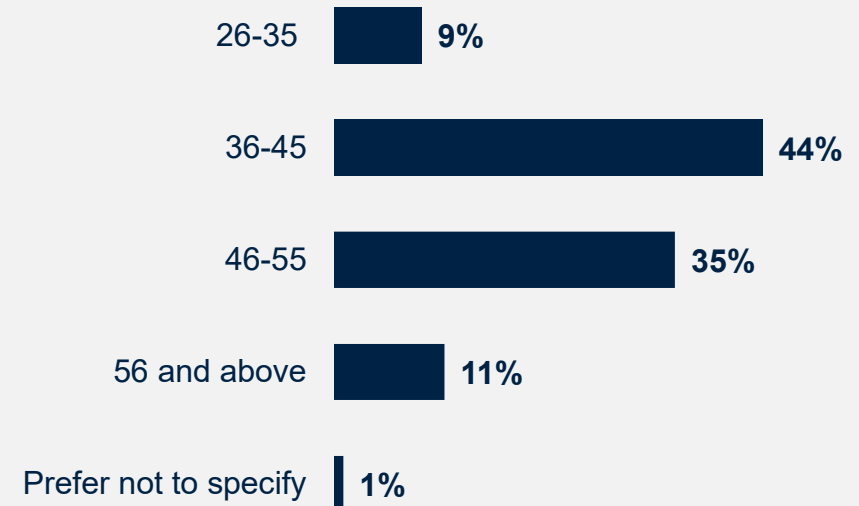


Sample Demographics (continued)

What is your gender? (N=208)



What's your age? (N=212)



Detailed Methodology

From **November to December 2024**, a total of 520 stakeholders in Ethiopia were invited to provide their opinions on the WBG’s work by participating in a Country Opinion Survey (COS). A list of potential participants was compiled by the WBG country team and the field agency. Participants were drawn from the Offices of the President, Minister, and office of parliamentarians; government institutions; local governments; bilateral or multilateral agencies; the private sector; civil society; academia; and the media.

Of these stakeholders, **220 participated in the survey (42% response rate)**. Respondents completed the questionnaire via an online platform or on paper.

This year’s survey results were compared to the FY18 Survey, which had a response rate of 64% (N=193).

Comparing responses across Country Surveys reflects changes in attitudes over time, as well as differences in respondent samples, methodology, and survey instruments. To minimize the impact of these factors, only questions with consistent response scales and options were analyzed. Any differences in stakeholder composition between the two years should be considered when interpreting the results of the year-over-year comparison analyses.

Key statistically significant findings (tested at the research standard of $p < .05$) are noted throughout the report.

Breakdowns for individual questions by stakeholder group can be found in the “Ethiopia COS FY25 Appendices with data breakdowns.xlsx” file published in the WBG Microdata Library, along with the survey microdata and this report.

| Percentage of Respondents | FY 2018 | FY 2025 |
|--|------------|------------|
| Government Principals: Office of the President, Minister, Parliamentarian | 21% | 15% |
| Government Institutions: Employee of a Ministry, Department, Project Implementation Unit, Independent Government Institution, Judiciary, State-Owned Enterprise | 21% | 26% |
| Local Government | 4% | 1% |
| Bilateral/Multilateral Agency: Embassy, Development Organization, Development Bank, UN Agency | 3% | 5% |
| Civil Society Organization: Local and regional NGOs, Community-Based Organization, Private Foundation, Professional/Trade Association, Faith-Based Group, Youth Group | 16% | 17% |
| Private Sector: Private Company, Financial Sector Organization, Private Bank | 17% | 16% |
| Academia / Research Center | 11% | 12% |
| Media | 6% | 10% |
| Other | 3% | 0% |
| Total Number of Respondents* | 180 | 218 |



What is your primary professional affiliation? (Select only 1 response)

*Not all respondents provided information about their professional affiliation. Therefore, the total number of respondents listed in the table is lower than the N reported in the methodology.

Indicator Questions

Every country that engages in the Country Opinion Survey (COS) must include specific indicator questions, several of which are aggregated for the World Bank Group's annual Corporate Scorecard and are highlighted in red below.

A1_5. How much do you trust the World Bank Group to do what is right for Ethiopia? Scale: 1 Not at all – 10 Very much

A2. How effective is the World Bank Group in helping Ethiopia achieve development results? Scale: 1 Not effective at all – 10 Very effective

A3. How significant a contribution do you believe the WBG's knowledge work makes to development results in Ethiopia?
Scale: 1 Not significant at all – 10 Very significant

To what extent do you agree with the following statements? Scale: 1 Strongly disagree – 10 Strongly agree

A4. The WBG currently plays a relevant role in development in Ethiopia.

A5. The WBG's work is aligned with what I consider the development priorities for Ethiopia.

A6. The WBG has a positive influence on shaping development policy in Ethiopia.

A7. The WBG's work helps end poverty in Ethiopia

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

C1_1. Responsiveness to needs in Ethiopia

C1_2. Access to WBG staff and experts

C1_3. Flexibility when circumstances change in Ethiopia

C1_5. Being a long-term partner to Ethiopia

To what extent is the WBG an effective development partner in Ethiopia, in terms of collaborating with the following groups?

Scale: 1 To no degree at all – 10 To a very significant degree

C2_1. National government

C2_4. Private sector

C2_5. Civil society

C2_6. Other donors and development partners

To what extent do you agree with the following statements? Scale: 1 Strongly disagree – 10 Strongly agree

C4_1. The WBG's financial instruments (i.e., budget support, loans, grants, trust funds) meet the needs of Ethiopia.

C4_3. The WBG provides financial support in a timely manner

C6_1. I am satisfied with the quality of the WBG's knowledge work in Ethiopia.

C6_4. The WBG's knowledge work is tailored to Ethiopia's context.





CountryOpinionSurveys

Thank you

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

countrysurveys@worldbankgroup.org

