



Country Opinion Surveys

FY 2025 **Kazakhstan** Country Opinion Survey Report

Acknowledgements

The Kazakhstan Country Opinion Survey is part of the Country Opinion Survey Program series of the World Bank Group. This report was prepared by the Business Intelligence (BI) team, led by José De Buerba (Senior External Affairs Officer) and Svetlana Markova (Senior External Affairs Officer). Yulia Danilina, Jessica Cameron, Nan Lin, and Sofya Gubaydullina oversaw the design, reporting, and analysis of the survey results. Noreen Wambui and Irina Popova provided data support.

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Objectives

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

- 1. Overall Views of the WBG:** How familiar are stakeholders with the WBG? How much do they trust the WBG? What opinions do stakeholders have of the WBG regarding its effectiveness and relevance to development in Kazakhstan? Are these perceptions improving or declining? Do stakeholders feel that the WBG has changed for the better or the worse in the last three years?
- 2. The WBG's Work on Development Priorities:** What areas of development are perceived to be the most important? Has the WBG helped achieve the goals of its projects in these areas? How did these projects impact the people of Kazakhstan, and how could the WBG have been more helpful?
- 3. WBG Instruments:** What do key stakeholders value the most regarding the WBG's work in Kazakhstan? What are the key stakeholders' opinions of WBG's financial instruments and knowledge products? How are stakeholders using WBG knowledge work, and has it influenced government policy in Kazakhstan?
- 4. The WBG's Operational Effectiveness, Engagement, and Collaboration:** How is the WBG perceived as a development partner in Kazakhstan? How do respondents perceive its operational effectiveness? Are opinions improving or declining? How effectively has the WBG facilitated the Government's engagement with civil society?
- 5. Communications:** What are the preferred communication channels, and do they differ between stakeholder groups? Do stakeholders recall any WBG messaging? What key topics do stakeholders recall? What information do stakeholders want from the WBG?



Methodology Overview

Fielded January – April 2025

- 603 potential participants were asked to complete the 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 conducted by an independent field firm

281 participants (47% response rate)

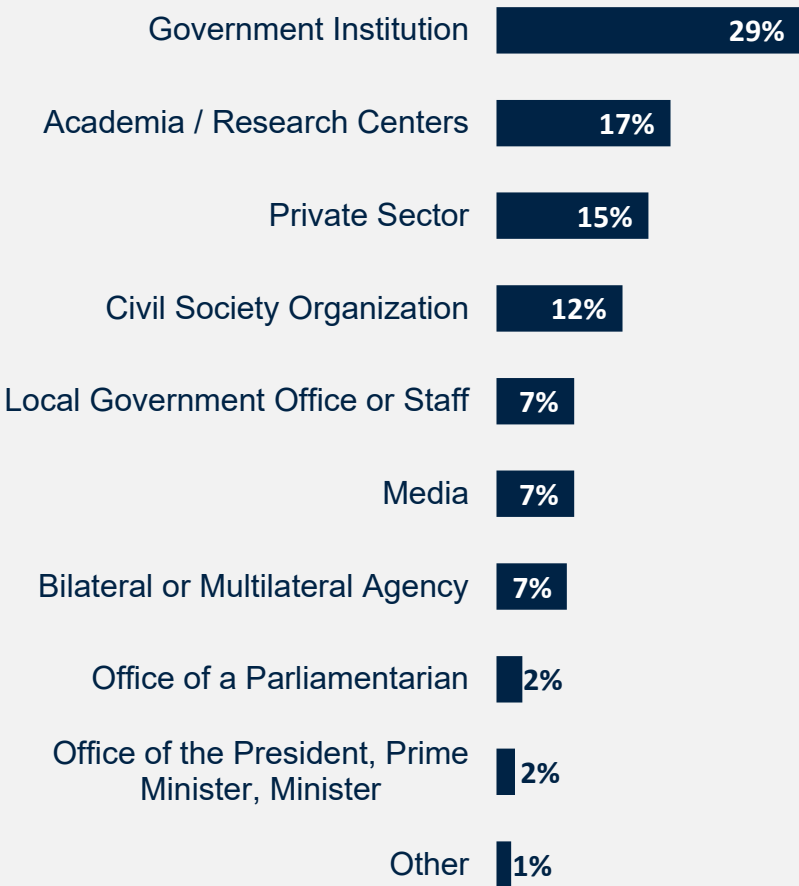
- 61% from Astana
- 59% have collaborated with the WBG within the past 4 years

Compared to the FY21 Country Survey Results

- 368 participants (63% response rate)
- 56% from Astana
- 56% collaborated with the WBG

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

Stakeholders in FY25 COS Sample



Executive Summary

1. Overall Views of the WBG:

This year, stakeholders reported **higher levels of familiarity** with the WBG than in FY21 and considered the Bank one of the most **trusted** institutions in Kazakhstan. Moreover, ratings for the WBG's **relevance** to the country's development and its **effectiveness** in helping Kazakhstan achieve results have improved significantly since the FY21 Country Survey.

Compared to other countries, stakeholder ratings on key performance indicators in Kazakhstan were higher than ratings in other ECA countries and IBRD countries surveyed in FY24.

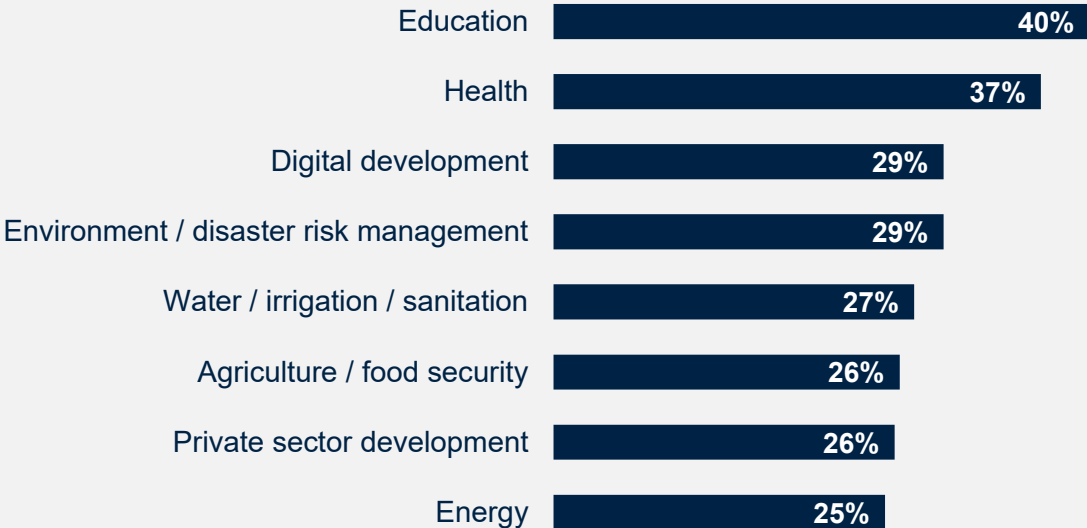


2. The WBG's Work on Development Priorities:

Under the current Country Partnership Framework (CPF, 2020-2025) pillars, the WBG's work on promoting climate change mitigation, energy efficiency, and strengthening connectivity infrastructure received the highest effectiveness ratings, whereas its support in promoting productivity in the agriculture sector and enhancing education development, health services, and adaptive social assistance was rated somewhat lower.

When asked how helpful the WBG was in achieving project goals, 96% of respondents rated the Bank as helpful, with **63% rating it as very helpful**.

Looking forward, stakeholders would like the WBG to focus its resources primarily on education and health in Kazakhstan, followed by digital development, environment/disaster risk management, and water/irrigation/sanitation.



Executive Summary (continued)

This year, respondents considered **environment, water, and energy sectors**, as well as **digital infrastructure** and **financial sector development**, to be much greater priorities for the Bank's involvement than four years ago.

In their written responses regarding how to make the WBG more effective in Kazakhstan, respondents also suggested promoting **entrepreneurship**, easing regulations, expanding SME financing, and assisting in **diversifying the economy** beyond natural resources. Enhancing the **rule of law**, reducing corruption, and fostering transparent, data-driven policymaking were also listed among the focus areas for WBG support.

3. WBG's Operational Effectiveness:

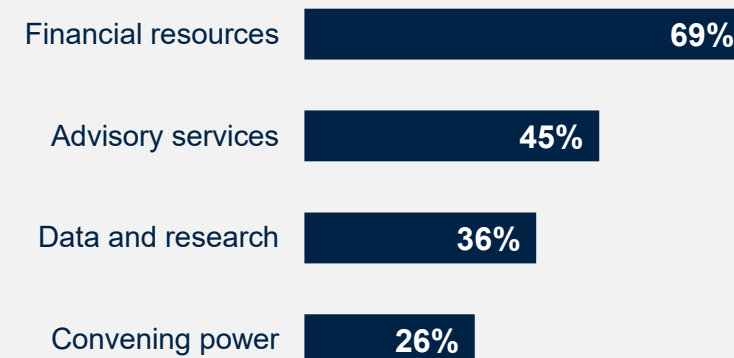
Over the past four years, WBG's clients and partners reported the most significant improvements related to the WBG reform in two areas: **ease of work** and **collaboration with other partners to mobilize development finance**, both receiving positive ratings from over 50% of respondents. Additionally, just under half of the respondents noted that the technical quality of the projects and the speed of project approvals have improved. At the same time, fewer respondents were familiar with the WBG's efforts to collaborate **across its institutions**, and just 41% observed any improvement in this area.

In their comments, stakeholders emphasized the need for the WBG to tailor its operations more closely to Kazakhstan's

specific context by grounding projects in local data, realities, and expertise. They also called for greater efficiency and timeliness, urging faster, results-oriented implementation. Additionally, respondents highlighted the importance of enhancing transparency, strengthening anti-corruption safeguards, and ensuring greater accountability from both the WBG and national institutions throughout the project cycle.

4. WBG Instruments:

Financial resources were considered the WBG's greatest value to Kazakhstan (69%) and were seen as meeting the country's needs. The WBG's financial support was perceived as significantly more timely this year than in FY21, and the WBG's financing requirements were considered reasonable. Respondents emphasized the need for a broader range of financial tools, including mid-size loans and grants.



Executive Summary (continued)

Respondents also recommended coupling funds with technical assistance, training, and policy consulting for better project outcomes.

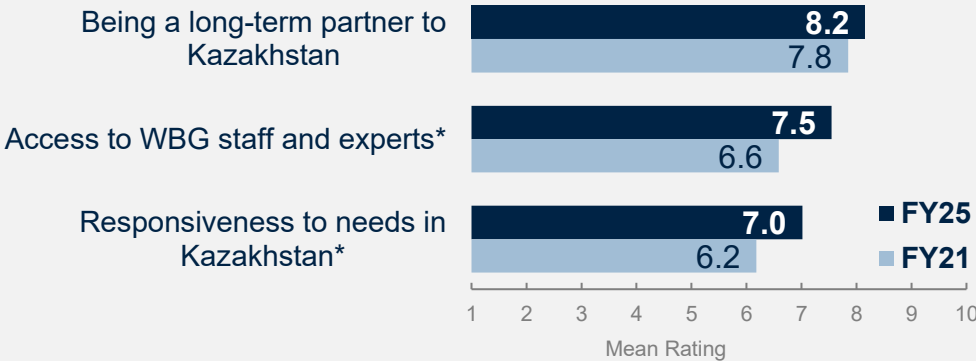
71% of respondents reported that they had used WBG’s knowledge work, primarily research/analytical reports, data resources, and advisory services. Stakeholders shared positive views on the Bank’s knowledge in terms of its technical quality and contribution to building institutional capacity and improving development results in Kazakhstan. In qualitative comments, respondents frequently mentioned knowledge-focused products and services, including evidence-based policy support, sector-specific studies, professional training, and capacity building, as important areas for the WBG in Kazakhstan.

5. The WBG’s Engagement and Collaboration:

Stakeholders perceived the WBG as a **long-term development partner**, with significantly more positive views of the Bank’s **responsiveness** to the country’s needs and **staff accessibility** compared to the FY21 COS results. Respondents from local governments and civil society were particularly positive.

Respondents highly appreciated the Bank’s **collaboration with the national government** and other development partners in Kazakhstan. In addition, the effectiveness ratings of the WBG’s partnerships with the private sector and civil society have improved over the past few years. In the future, stakeholders

would like the Bank to collaborate more effectively with academia/research centers, the private sector, local governments, and civil society (including NGOs, women’s organizations, and youth) to increase its development impact in the country.



6. Communications:

51% of respondents recalled seeing or hearing something about the WBG recently, most often about the WBG’s economic forecasts and its work on climate change adaptation and human capital. Stakeholders were most likely to recall getting this information from traditional media and at WBG’s events.

Respondents reported that they prefer to obtain communication from the WBG at its events, via direct contact with WBG staff, or newsletters. Among the most helpful information types for better understanding the Bank’s role in Kazakhstan, stakeholders listed case studies of WBG projects, WBG research/knowledge, and impact assessments/evaluations.



Overall Views of the World Bank Group



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Familiarity with the WBG has Slightly Gone Down Since FY21, Highest Among Government Institutions

Comparison of FY21 and FY25

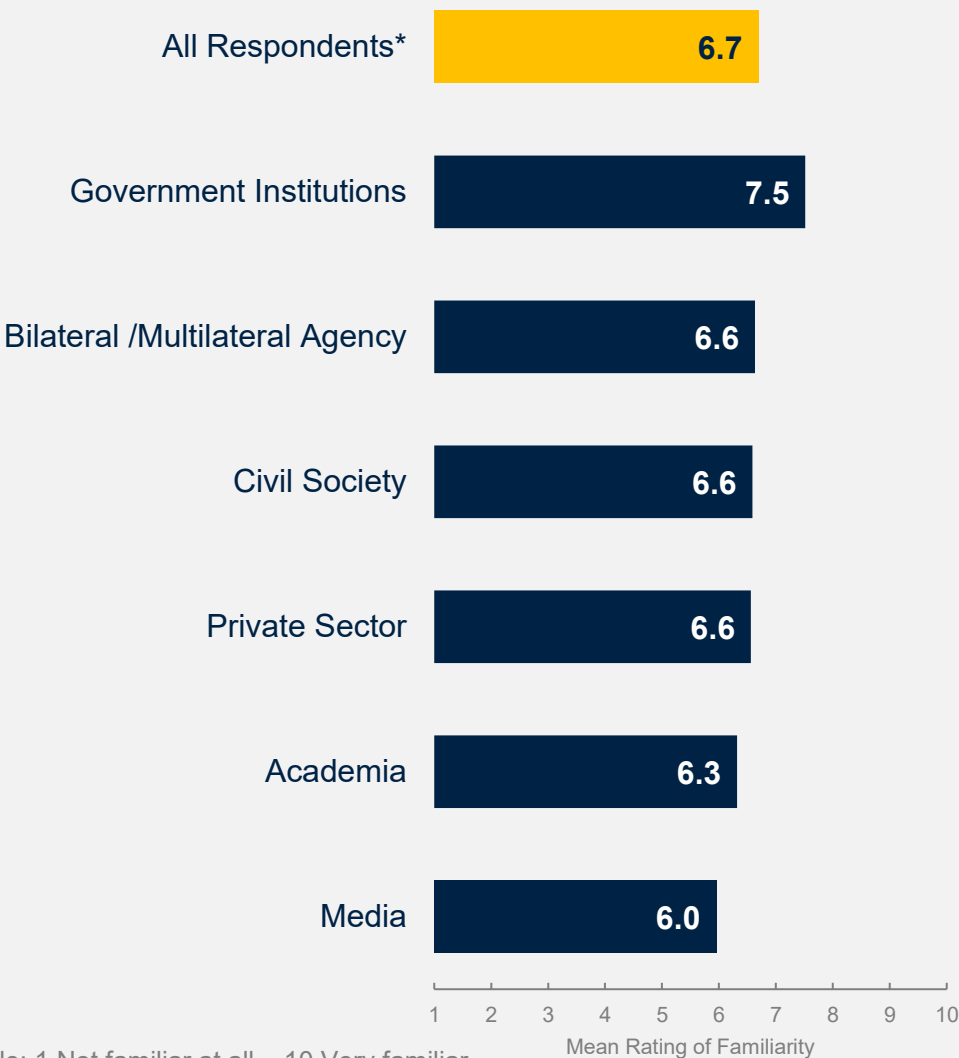
Mean familiarity: **FY25 = 6.7**
 FY21 = 6.0

Collaboration with the WBG

Mean familiarity: **Collaborate with WBG = 7.7***
 Do not collaborate = 5.2

Stakeholder groups

Respondents from government institutions were most familiar with the WBG, whereas respondents from academia and the media were significantly less familiar.

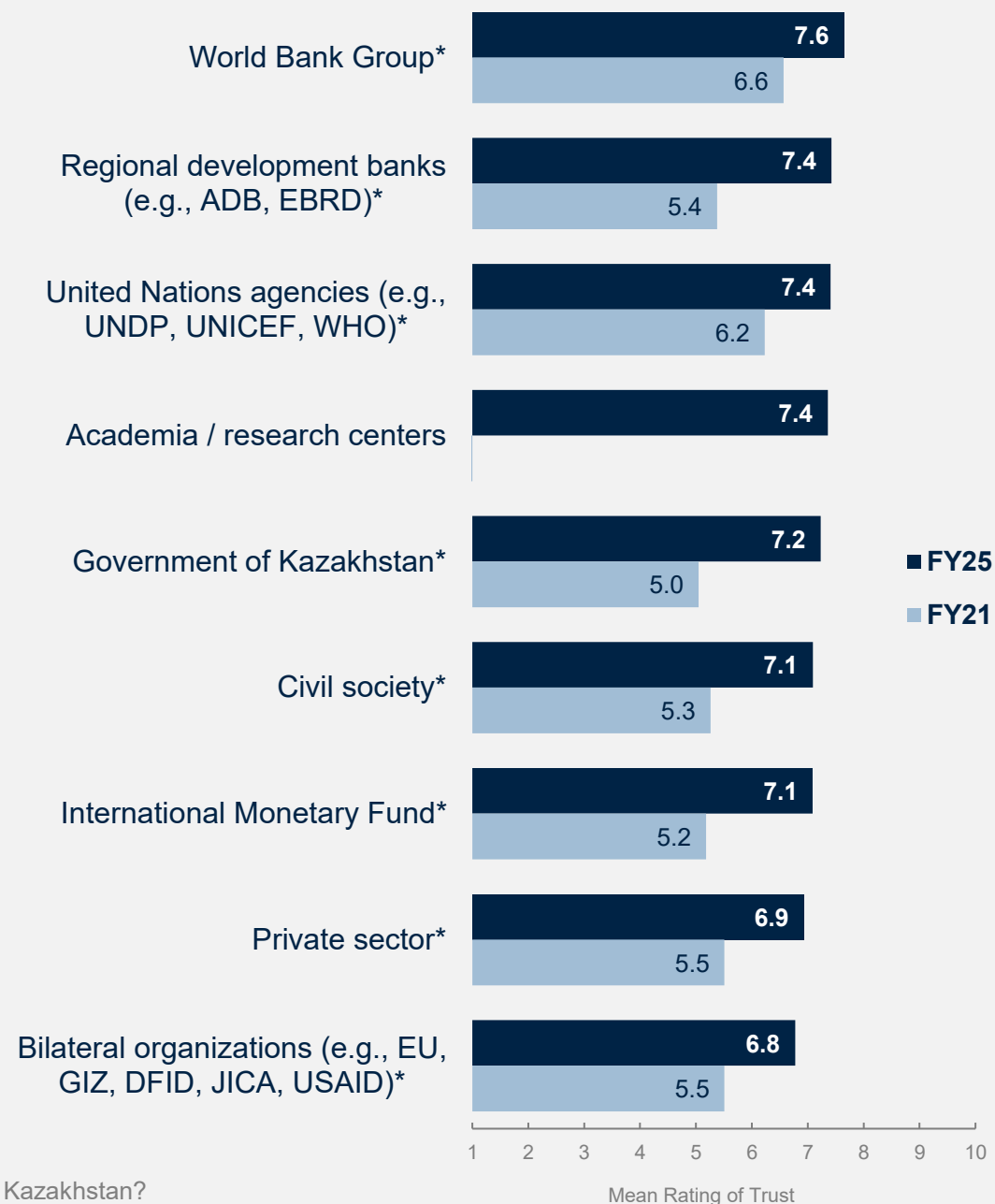


How familiar are you with the World Bank Group's work in Kazakhstan? Scale: 1 Not familiar at all – 10 Very familiar

* Denotes significant difference between groups

Trust Across all Institutions, Including the WBG, has Significantly Increased

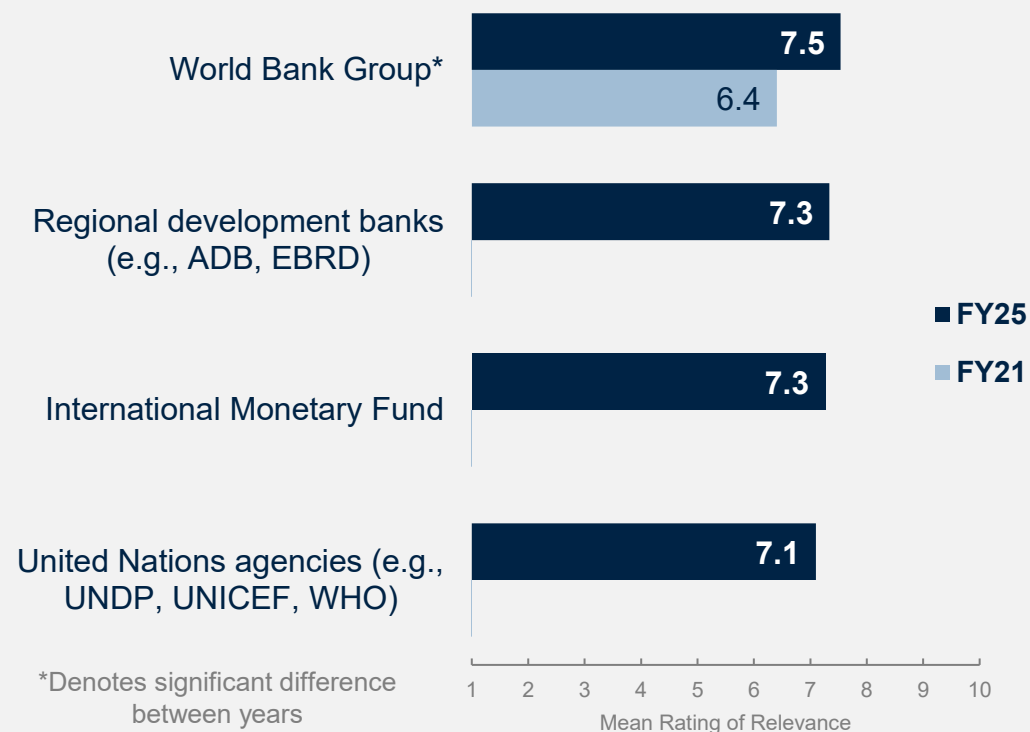
While respondents expressed higher levels of trust in the WBG overall, **media** representatives reported the lowest trust levels (mean = 6.2).



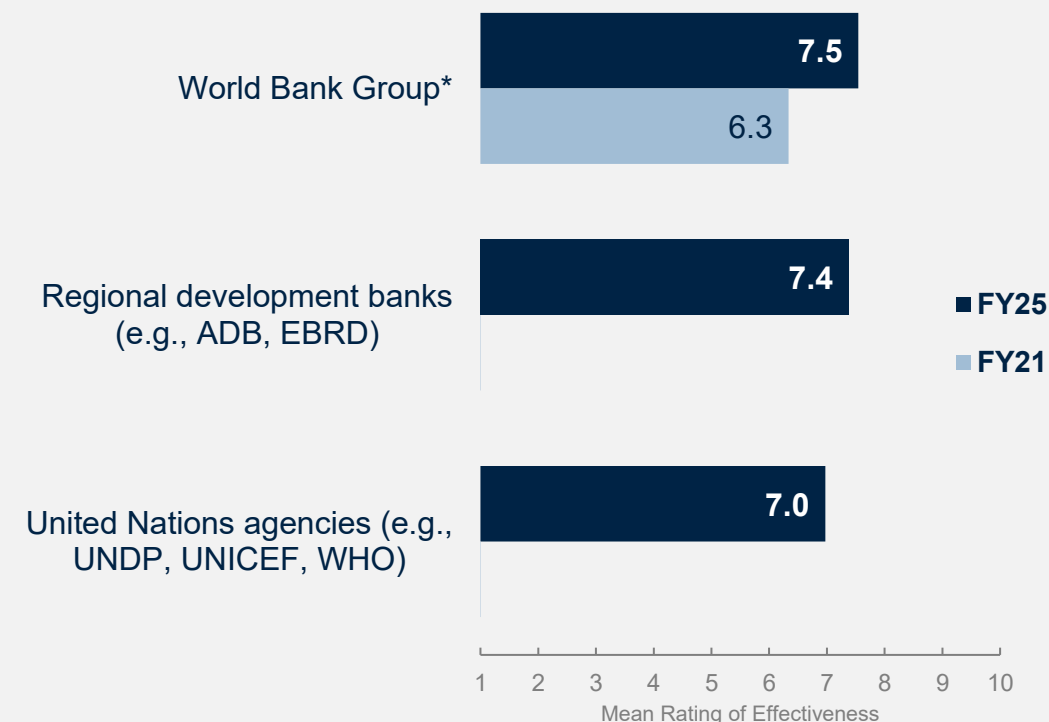
Perceptions of WBG Relevance and Effectiveness Have Increased

Compared to the FY21 COS, respondents this year rated the WBG significantly more positively in terms of its relevance and effectiveness.

RELEVANCE to Kazakhstan's development



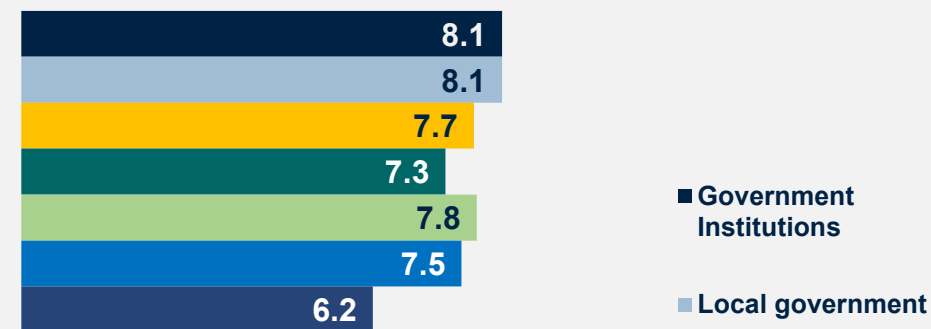
EFFECTIVENESS in achieving development results



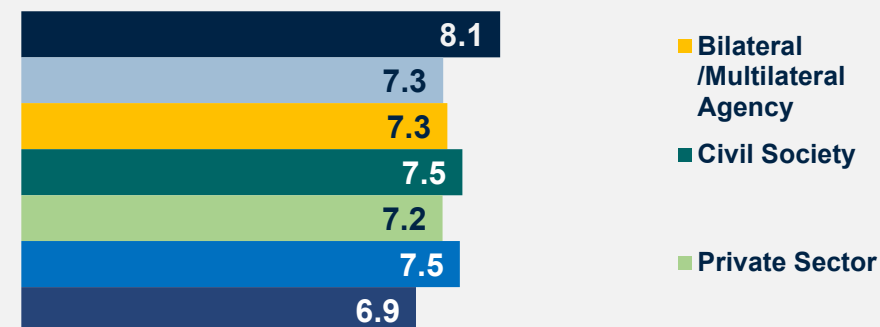
Stakeholders from Government Institutions Had More Positive Perceptions of the WBG

Media respondents were more critical of the WBG; however, it should be noted that these respondents also reported the lowest levels of familiarity.

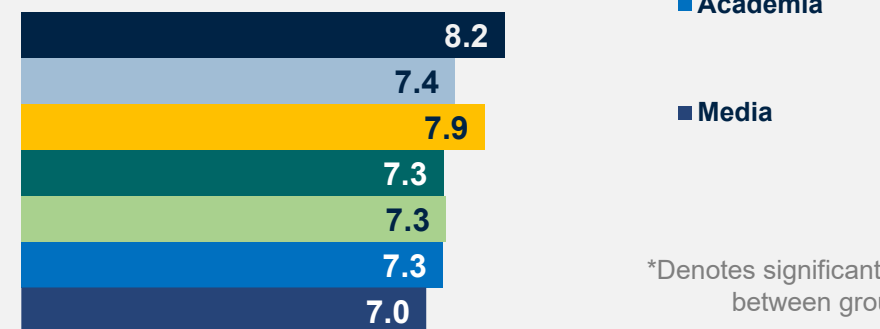
Trust the WBG to do what is right for Kazakhstan*



Relevance to Kazakhstan's development



Effectiveness in helping Kazakhstan achieve development results

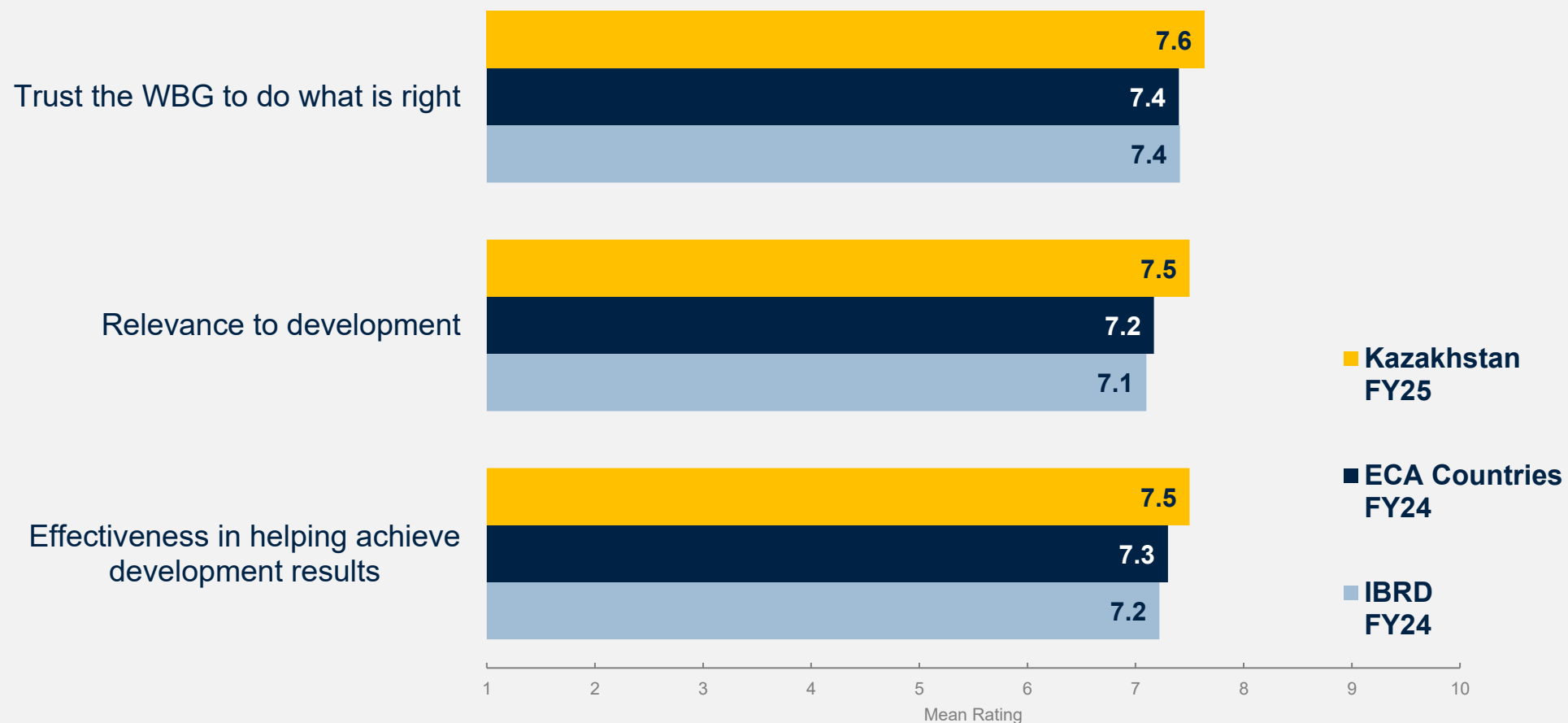


*Denotes significant difference between groups

1 2 3 4 5 6 7 8 9 10
Mean Rating

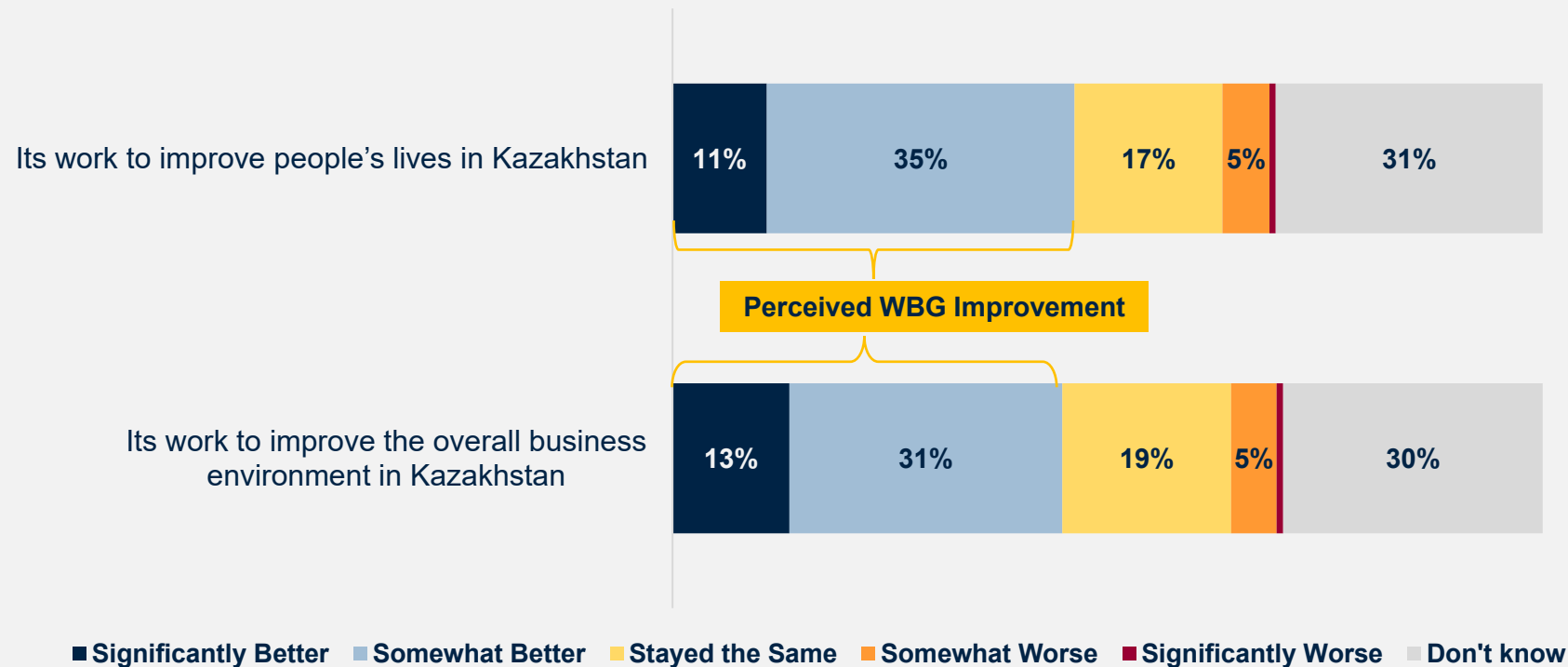


KPI Ratings in Kazakhstan are Higher than ECA and IBRD Averages in FY24



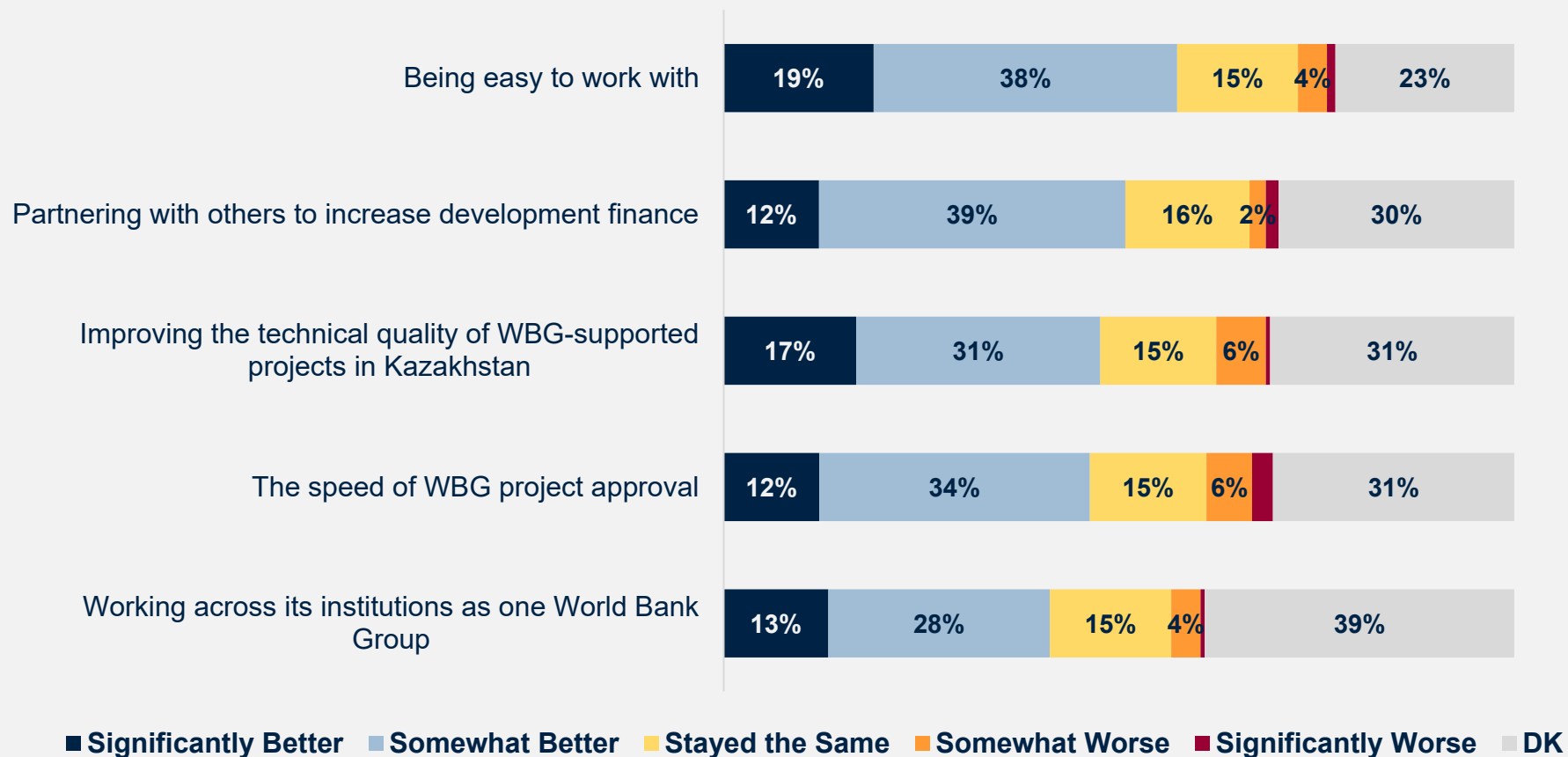
In the Past Four Years, Nearly Half of the Stakeholders Saw Improvements in People's Lives and Business Environment from WBG Efforts

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



Around 6 in 10 Respondents Reported an Improved Ease of Working with the WBG Over the Past Four Years

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



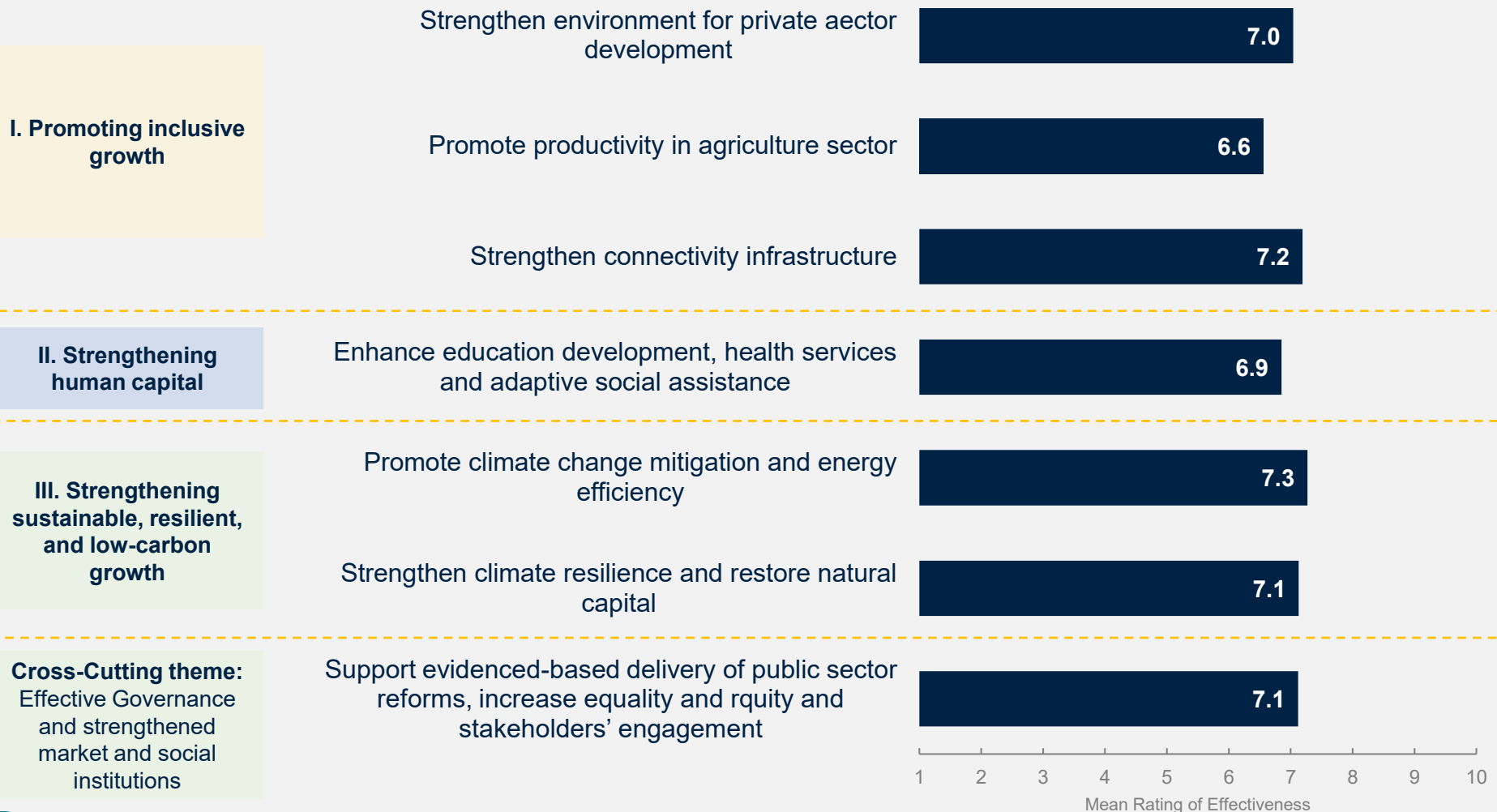
The WBG's Work on Development Priorities



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Stakeholders Strongly Value WBG Support in Climate Change and Connectivity Infrastructure, but Are Less Confident in Its Impact on Agricultural Productivity

Kazakhstan Country Partnership Framework 2020-2025



WORLD BANK GROUP



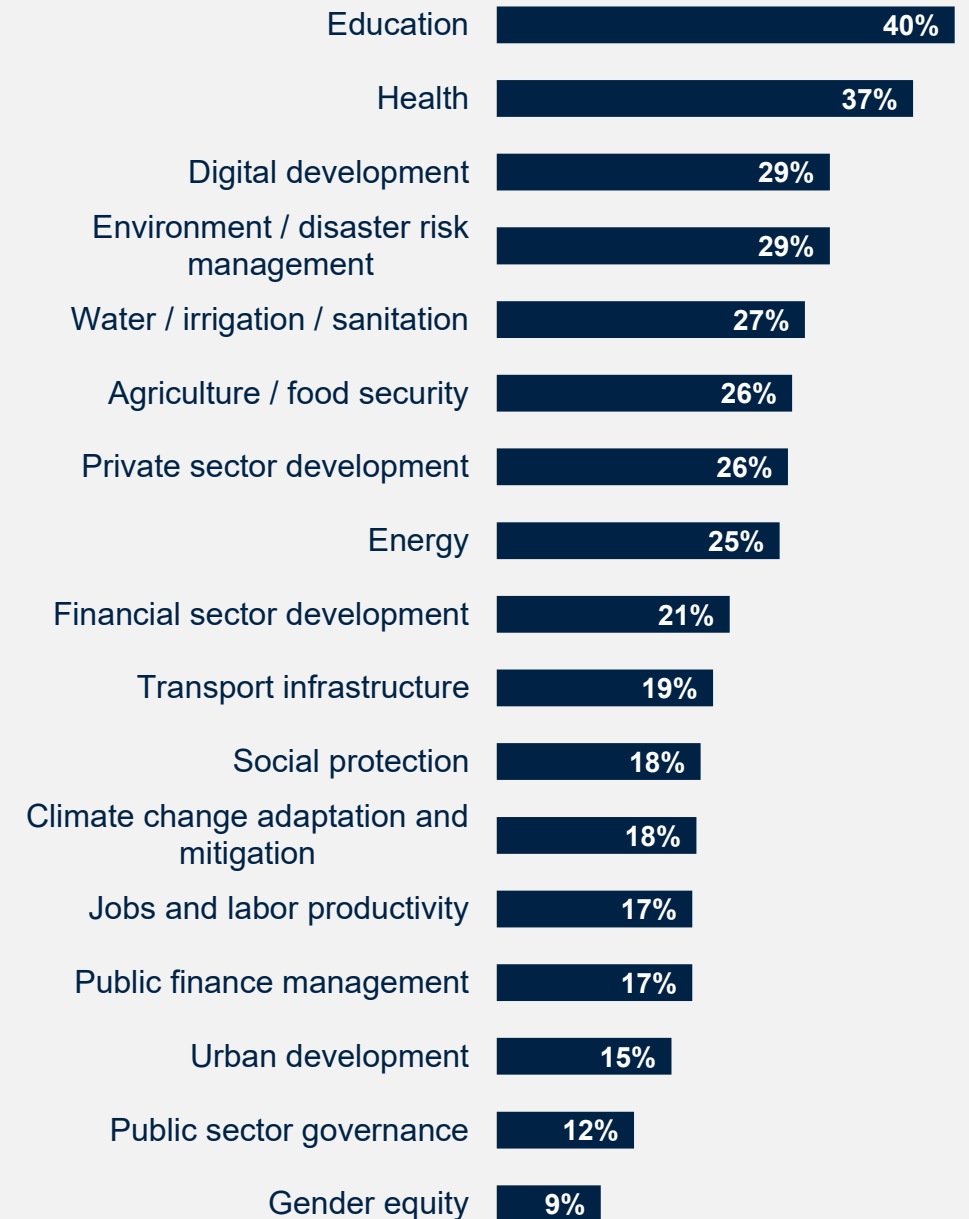
The WBG has identified three focus areas and one cross-cutting theme in its current strategy (Country Partnership Framework 2020-2025) with the Government of Kazakhstan. How would you rate the EFFECTIVENESS of the WBG support in the following aspects of these focus areas? (Not effective at all 1; Very effective 10)

WBG: Focal Development Areas

Between FY21 and FY25, stakeholder priorities shifted significantly. The share of respondents citing **water, irrigation, sanitation, and energy** as a top priority rose sharply—from just 4% to over 25%—placing these sectors among the most frequently mentioned areas for the WBG to focus on. Likewise, environment and disaster risk management climbed in importance to become the fourth-highest priority by FY25.

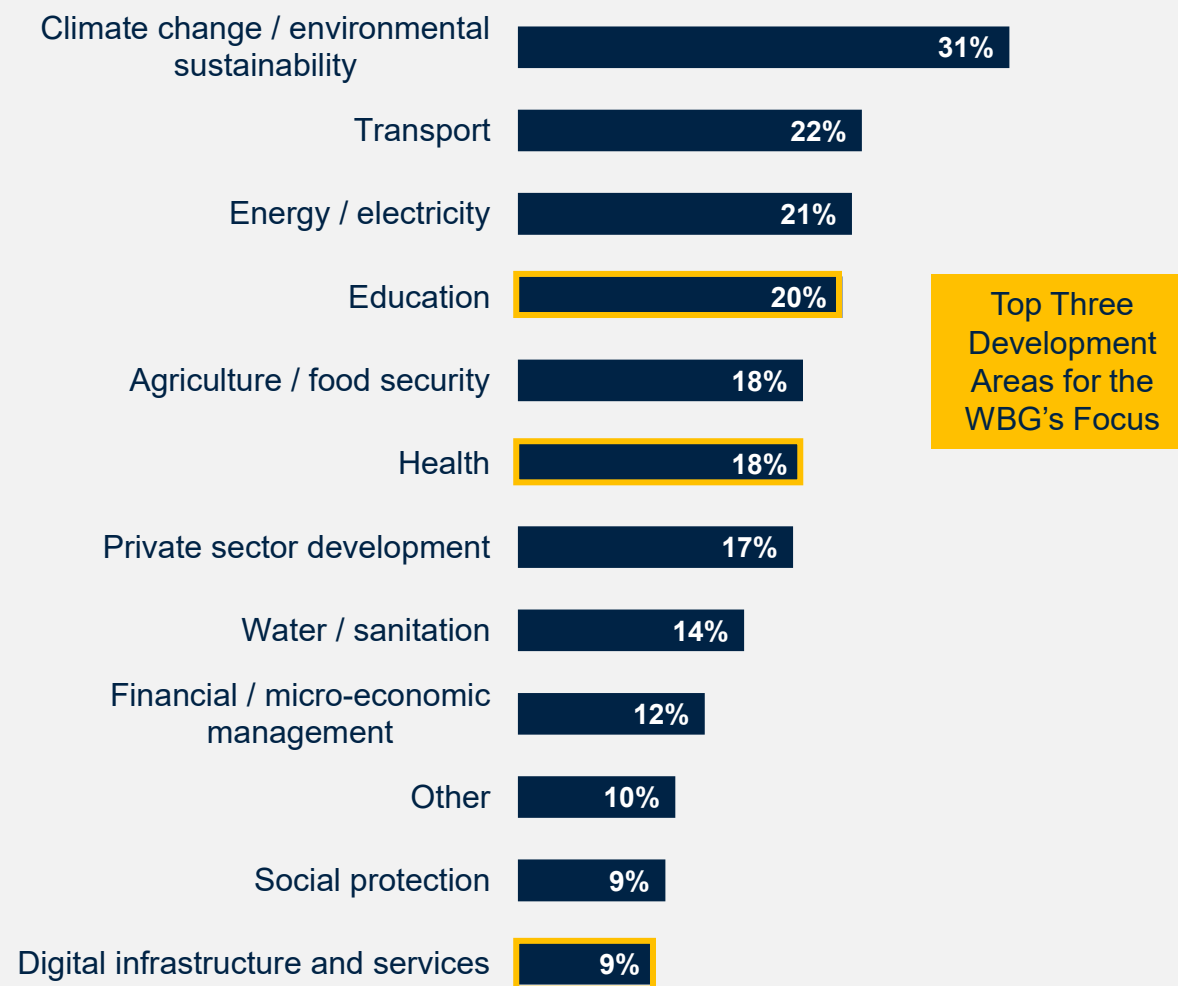
In their open-ended feedback[^] on how the WBG could enhance its effectiveness, stakeholders consistently pointed to several priority areas for the WBG to focus on:

- Strengthen **education systems** through modernized schools, improved teacher training, vocational programs, and climate literacy to build long-term human capital.
- Promote **entrepreneurship**, ease regulations, expand SME financing, and diversify the economy beyond natural resources.
- Support **renewable energy, climate resilience**, sustainable water use, environmental education, and disaster preparedness.
- Invest in transport, health, digital, and utility **infrastructure** to improve service delivery, inclusion, and economic opportunity.
- Enhance **the rule of law**, reduce corruption, build local institutional capacity, and foster transparent, data-driven policymaking.



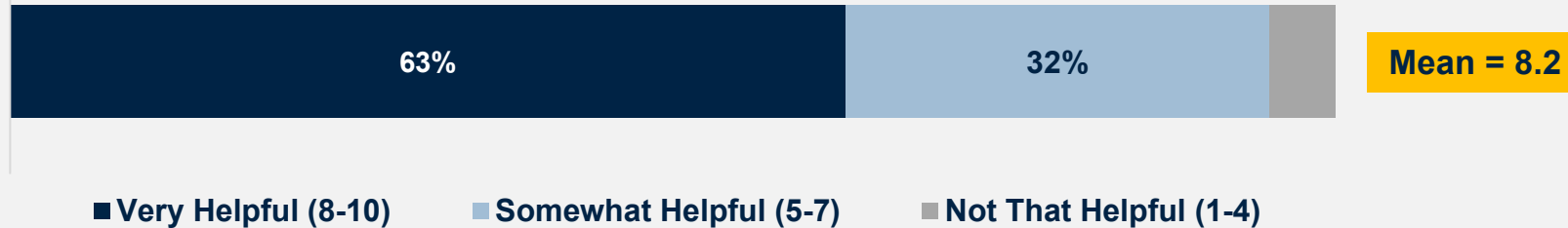
A Third of Respondents Recalled Projects Related to Climate Change/Environmental Sustainability

In their open-ended responses, WBG clients discussed a wide range of WBG projects over the past years. For instance, they recalled projects related to improving the qualifications of teachers and empowering the youth. Several respondents mentioned the Aral Sea restoration project, energy projects (including carbon neutrality), and others.



Nearly All WBG Clients Said the WBG Was Helpful in Achieving Project Goals, With Majority Rating is as “Very Helpful”

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



In Open-Ended Comments, Clients Discussed the Impact the WBG-Supported Project Had on the People of Kazakhstan

“Increased connectivity (between cities), both physical (actual road construction) as well as data access (digitalisation project). Better infrastructure leads to further private sector development. DPO came with a number of reform agendas that are aimed at improving people’s lives.” (Bilateral/Multilateral respondent discussing **the WBG connectivity and infrastructure development project**)

“Thanks to this project, a significant modernization of social and educational facilities in Kazakhstan took place, which allowed them to reduce the volume of losses in both thermal and regular energy, as well as in water, which, as a result, led to savings in these facilities.” (Academia respondent discussing **the project on energy efficiency**)

“The implementation of One Health initiatives in Kazakhstan since 2018 has led to notable improvements in zoonotic disease control, intersectoral collaboration, and health system resilience. Key results include a 32% reduction in brucellosis cases (2020–2025), strengthened pandemic preparedness infrastructure, and the establishment of the first regional disease surveillance network in Central Asia. However, challenges remain with data integration and sustainable financing, and climate change is exacerbating existing health risks.” (Bilateral/Multilateral Agency discussing the **One Health project**)



How helpful was the WBG in achieving the goals of this project or initiative? Scale: 1 Not helpful at all – 10 Very helpful.

Asked only of those who said that they collaborate with the WBG, Percentage of Respondents, N=155

[If helpful rating > 4] How did this WBG-supported project or initiative impact the people of Kazakhstan? (Please be specific) (N=93)



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Operational Effectiveness: Summary of Comments

What is the most important thing the WBG could do to increase its effectiveness in these priority areas in Kazakhstan?

Local Adaptation and Relevance of Operations

- Projects should be better tailored to Kazakhstan's specific needs and conditions by grounding interventions in local data, realities, and expertise, ensuring they reflect the population's real priorities.

Efficiency, Timeliness, and Bureaucratic Streamlining

- WBG should reduce bureaucratic delays and move from overly general project frameworks to faster, more action-oriented implementation that delivers timely and concrete results.

More Inclusive, Evidence-Based, and Coordinated Planning

- There is a desire for broader consultations with national and local governments, experts, and civil society before launching new projects. Emphasis is placed on applying global best practices supported by scientific research, local data, gender-disaggregated analysis, and the integration of advanced digital tools like AI, IoT, and Big Data.

Stronger Transparency and Governance Mechanisms

- Improved transparency, citizen engagement, and anti-corruption safeguards are needed, along with more active accountability from both the WBG and national institutions throughout the project cycles.



The WBG's Instruments

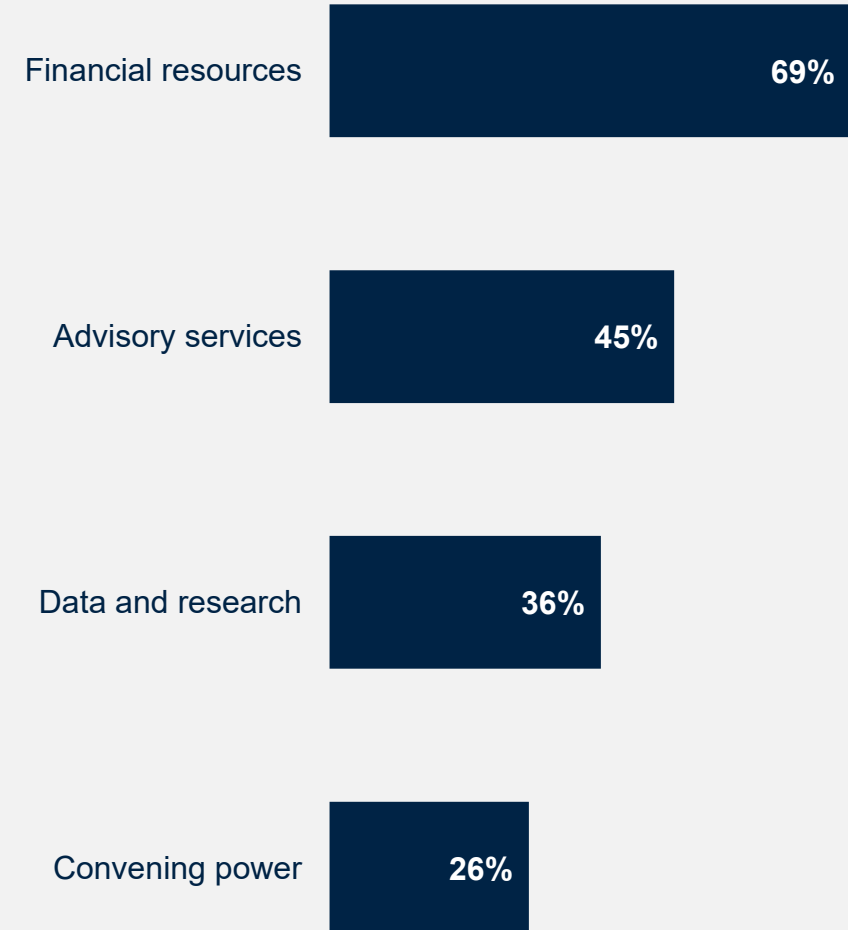


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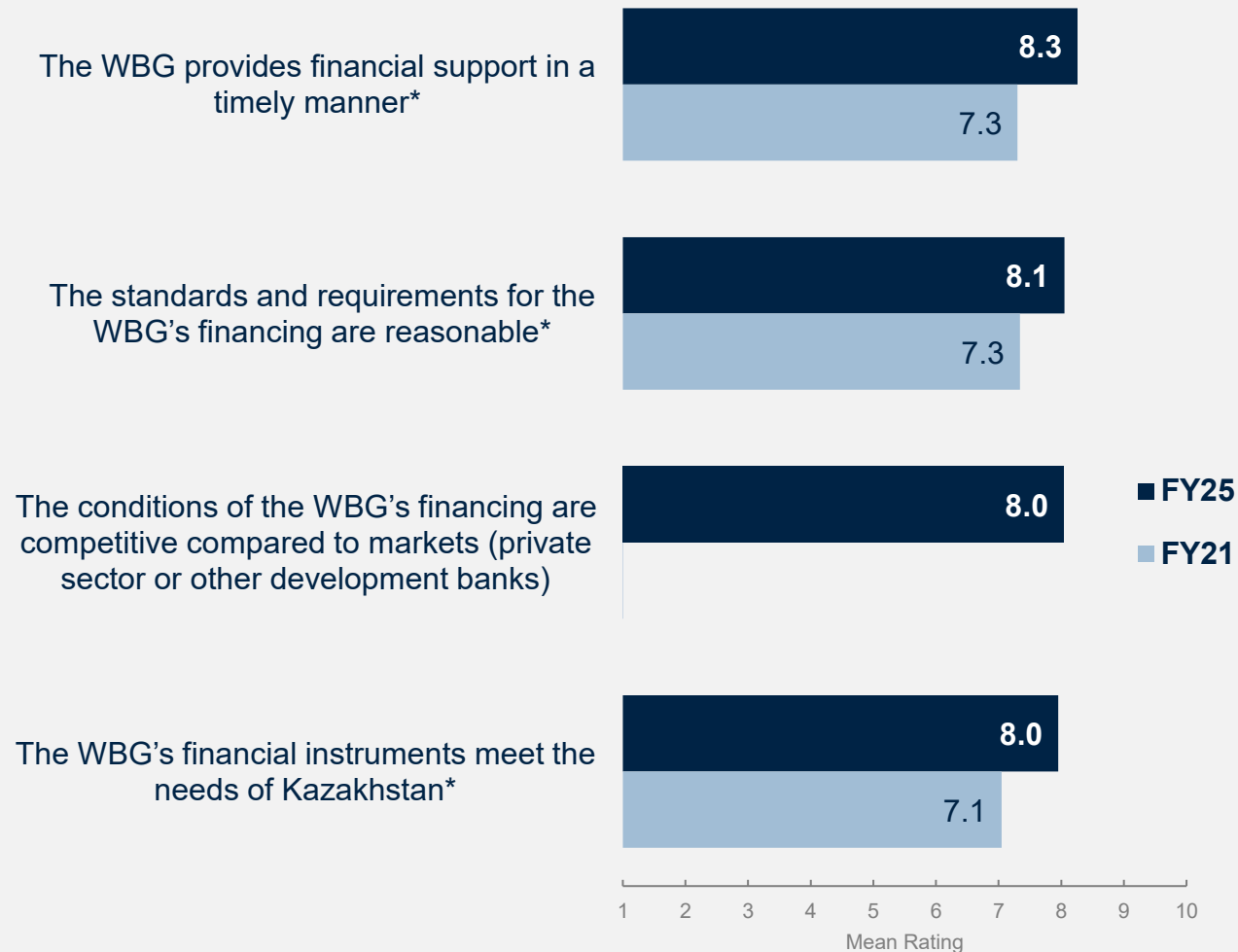
Financial Resources Considered the WBG's Greatest Value to Kazakhstan

Data and research were significantly more valuable for respondents from **bilateral/multilateral agencies** (63%) and **academia** (43%).

The importance of financial resources has increased since FY21, when only 20% of respondents selected this option.



Perception of the WBG Financial Instruments, Including Timeliness of Support, has Improved Significantly



*Denotes significant difference between years



Key Messages on WBG Financing: Summary of Comments

What is the most important thing the WBG could do to increase its effectiveness in these priority areas in Kazakhstan?

Increase and Diversify Funding Instruments

- Respondents emphasized the need for a broader range of financial tools, including mid-size loans, mini-grants, and preferential financing. They noted that large loans may benefit the WBG financially but are not always the most developmentally effective. Currency risk hedging and long-term financing mechanisms were also suggested to improve sustainability and effectiveness.

Strengthen Access to Grants and Support for Research, Education, and Civil Society

- Many called for greater grant availability to support scientific research (especially in agriculture and biology), environmental education, teacher training, and school-based pilot projects. There were also appeals to fund civil society organizations and to increase cooperation between government, business, and NGOs through financial partnerships.

Pair Financial Support with Advisory and Capacity-Building Services:

- Respondents recommended coupling funds with technical assistance, training, and policy consulting. This includes support for project design and implementation, ensuring financial investments are effectively targeted and implemented.



Most Respondents Used WBG Knowledge Work in the Past 4 Years —Primarily Research and Analytical Reports

Different stakeholder groups used different types of WBG knowledge work:

- **Advisory services** were likely to be recalled by government institutions (35%), while **data resources** by the private sector (44%).
- Stakeholders from local government (70%) and civil society (53%) were more likely to report that they **have not used WBG knowledge**.



65% of Respondents Report WBG Policy Advice Shaped Government Policy and Influenced Important Development Areas

In your opinion, has the WBG's policy advice influenced a new or previous government policy in Kazakhstan?

Environment

- *"Policies influenced by the WBG advice: Development of a new national air quality plan, approved in 2022. As part of this plan, the government committed to modernizing the air pollution monitoring system, implementing EU air quality standards, and making monitoring data available online in real time..."* (Civil Society Respondent)
- *"Decarbonisation - and the road to carbon neutrality - establishment of the LTS and ETS in the country, as well as a plan for reducing methane emissions."* (Respondent from Bilateral/Multilateral Agency)
- *"Improving the condition of the Aral Sea"* (Media Respondent)

Healthcare System

- *"On the implementation of the 'One Health' concept"* (Academia Respondent)
- *"Transformation of the system of training healthcare specialists, development of human resources; formation of a conceptual basis for the implementation of the compulsory medical insurance system (mechanisms, tools, ideology); digitalization of healthcare (standardization, resources), strengthening the primary health care system, etc."* (Government Institution Respondent)

Overall Business Environment and Innovation Policy

- *"In 2024, the Kazakhstan Welfare Assessment 2024 report was published, highlighting the need to focus fiscal policy on the poor and vulnerable, improve education, and strengthen resilience to climate change. It likely formed the basis for the reforms currently underway."* (Private Sector Respondent)
- *"Consulting by the WBG has had a significant impact on Kazakhstan's policy in improving the business climate, especially in terms of simplifying business procedures. Improved mechanisms for protecting minority investors. Kazakhstan has amended corporate legislation, strengthening the transparency of companies and shareholder rights."* (Media Respondent)
- *"The experience of the project implementation, expert and consulting support influenced the state's scientific and innovation policy. The results and experience of the Project Commercialization Project and the Project for Stimulating Productive Innovations were implemented in national legislation, in the system of state support, etc."* (Government Institution Respondent)
- *"The government has decided to allocate additional budgetary funds for the creation of Centers of Academic Excellence and to increase funding for science."* (Respondent from the Office of the President, Prime Minister, or Minister)



In your opinion, has the WBG's policy advice influenced a new or previous government policy in Kazakhstan? (Percentage of Respondents, N=187)

What government policy or action did the WBG's advice influence and in what way? (N=64) Select comments corresponding to the top 2

Development priorities for the WBG's focus, as identified by respondents, are shown here.



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71% of Respondents Use WBG Knowledge; More See It Contributing to Development Outcomes

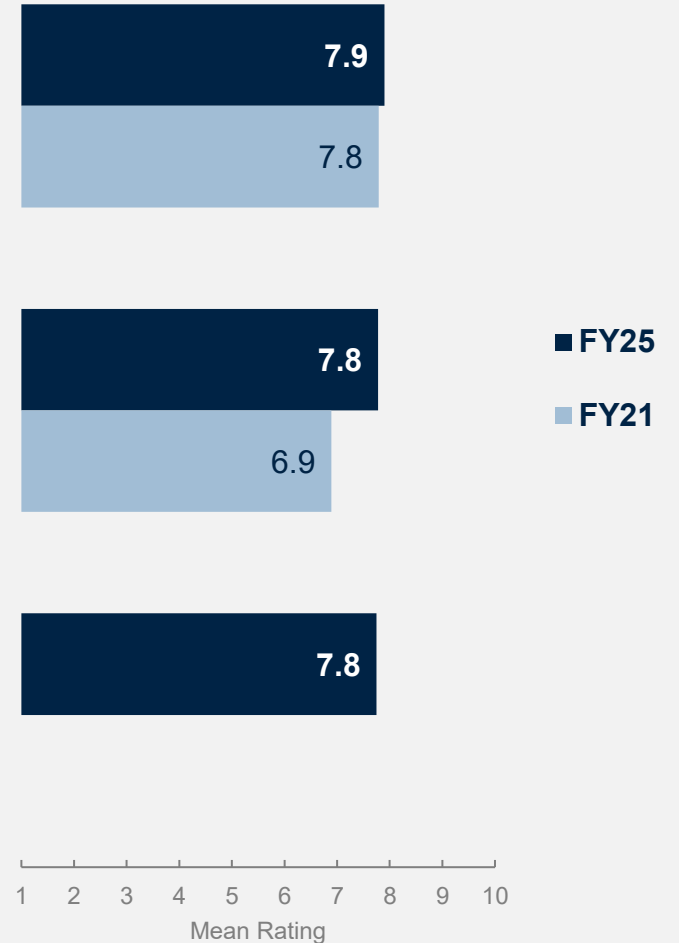
Respondents from **bilateral/multilateral agencies** and **government stakeholders** were notably positive (mean = 8.5) about the knowledge work contribution, while media respondents were significantly less favorable (mean = 6.5).

To improve the Bank's knowledge work^^, respondents suggested providing financial support to local universities, continuing to hold training and seminars for government workers, and increasing contact with non-governmental actors.

Working with the WBG increases Kazakhstan's institutional capacity^

WBG's knowledge work makes a significant contribution to development results*

I am satisfied with the quality of the WBG's knowledge work in Kazakhstan^



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

^ Only asked those who indicated that they had used WBG knowledge work in the past 4 years.

^^ If you rated the quality of the WBG's knowledge work between 1-4, how could the WBG improve the quality of its knowledge work in Kazakhstan? (Please be specific) (N=6)



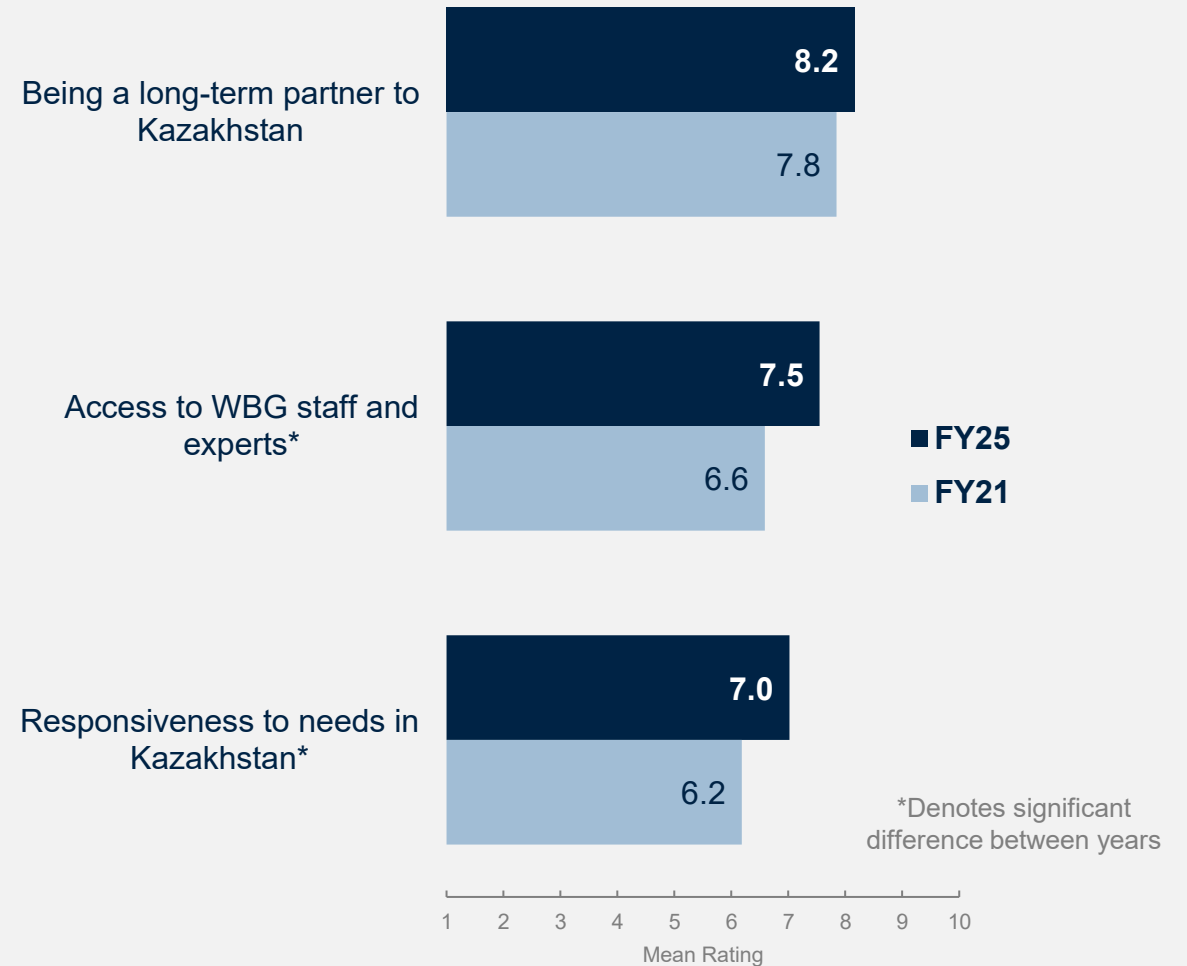
The WBG's Operational Effectiveness, Engagement and Collaboration



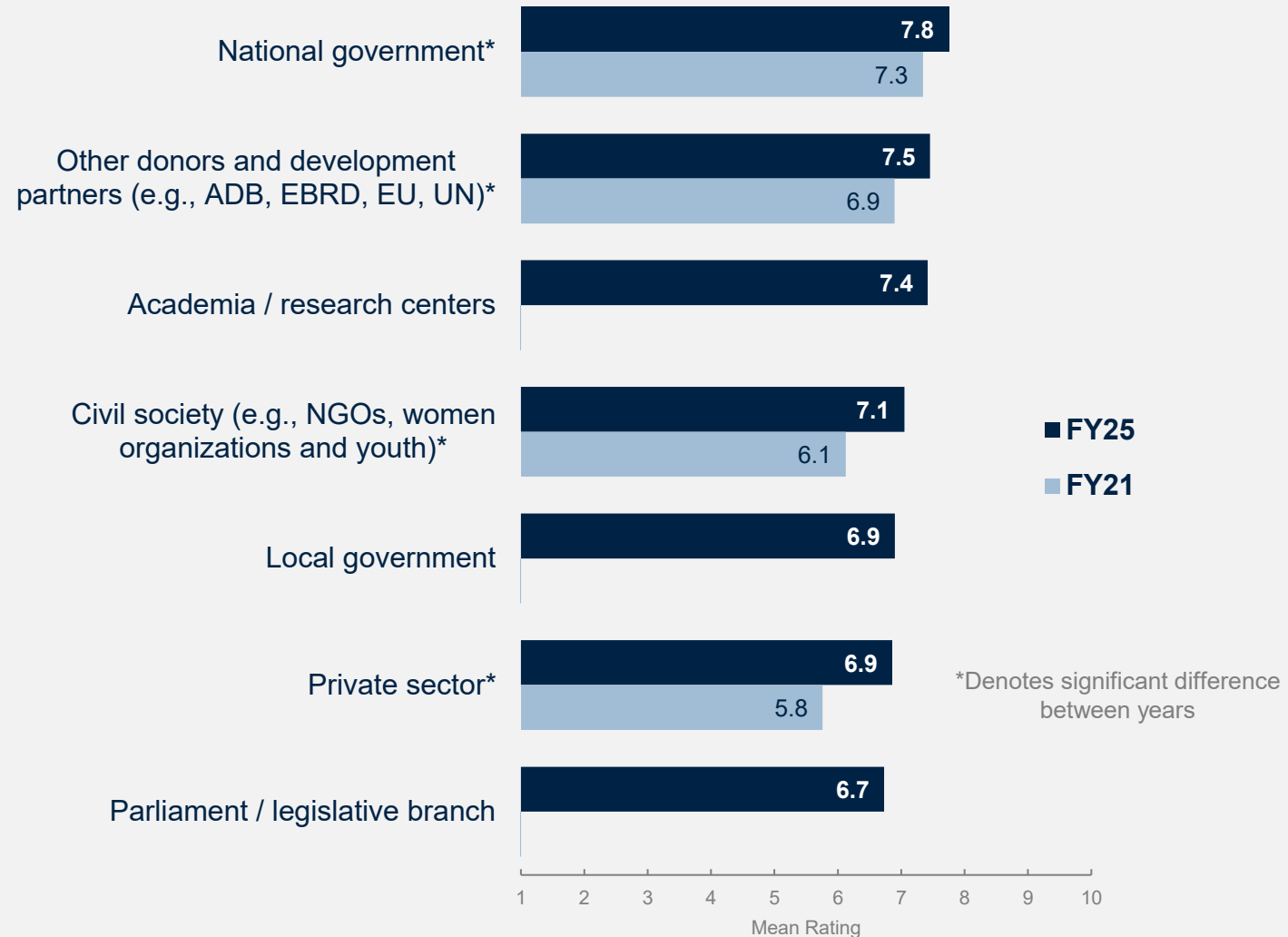
WORLD BANK GROUP

The WBG Is Consistently Perceived As A Long-term Partner; Perceptions of Accessibility and Responsiveness Have Improved

Stakeholder opinions vary significantly: respondents from civil society and local government were especially positive, while respondents from the media were generally less positive about the three indicators.



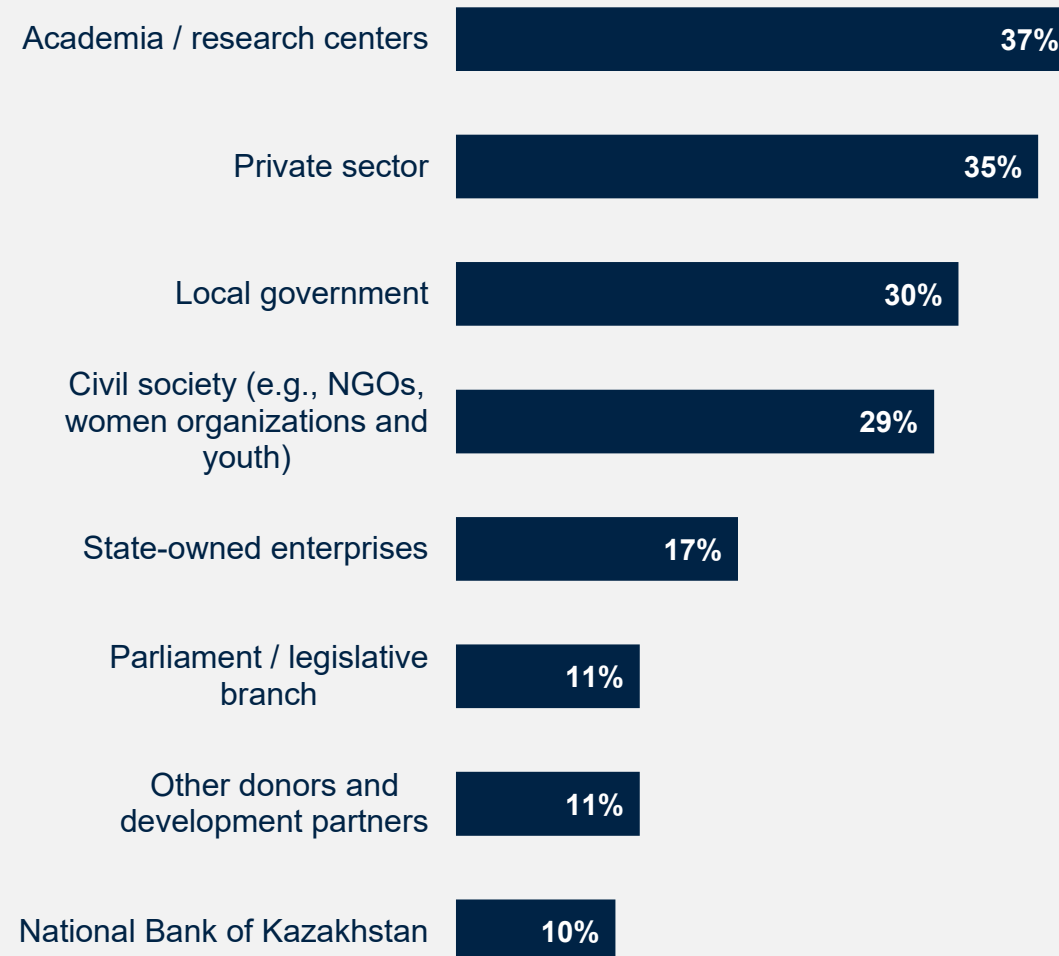
Perceptions of WBG Partnerships in Kazakhstan Have Improved Significantly



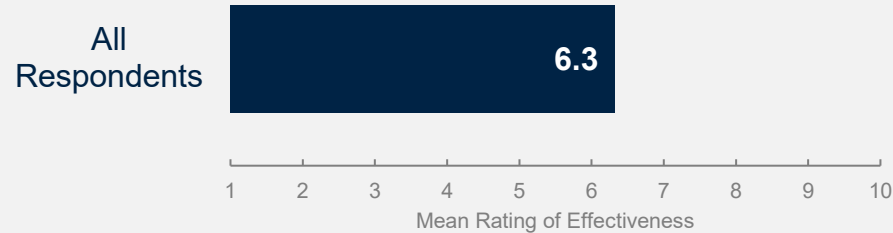
Stakeholders Want the Bank to Collaborate More With Academia and the Private Sector

In their comments answering the question of how the WBG can be more effective in Kazakhstan,[^] some respondents discussed the need for the WBG to increase engagement and collaboration with stakeholders. They:

- Emphasized the importance of involving local CSOs and NGOs more directly in project planning and implementation;
- Called for increased civil society's access to funding and project opportunities, including through dedicated financing mechanisms;
- Encouraged forming partnerships that bring together government, business, and NGOs. These collaborations are seen as essential for tackling complex development challenges



WBG Effectiveness in Facilitating Civil Society Participation



Respondents across all stakeholders gave statistically similar ratings for the WBG's effectiveness at facilitating civil society participation in development policy dialogue and implementation in Kazakhstan.

Approximately 24% of respondents rated the WBG's effectiveness in engaging with civil society as below average (scores 1–4). These respondents recommended several ways the WBG could enhance its engagement, including the following:

- Involve civil society actors in discussions, program development, and implementation processes.
- Link WBG projects with existing civil society proposals to ensure relevance and continuity
- Simplify grant procedures and make support schemes more transparent
- Supporting internships and training abroad for civil society leaders.

Some Examples of the WBG's Effective Facilitation of Civil Society Participation

"Open Budget Platform. Provides civil society with tools to track budget expenditures."
(Private Sector Respondent)

"Small grants program to support activities (vulnerable groups of the population), aimed at strengthening civil interaction in order to provide broad rights and powers to this group of the population to conduct seminars/master classes/conferences; preparation of publications (audio/video) and other propaganda activities that are difficult to finance from the MB and RB of their basic programs."
(Government Institution Respondent)

"Local farmer associations, cooperatives, and environmental initiative groups actively participated in the design of environmental measures. Involvement of women in planning processes through local NGOs. Training workshops and knowledge exchange with local activists and akimats."

Result: Improved environmental literacy and self-government at the local level. Real restoration of pastures and introduction of sustainable land use methods.." (Government Institution Respondent, discussing **the Central Asia Sustainable Landscape Management Project** (2021–2023))



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

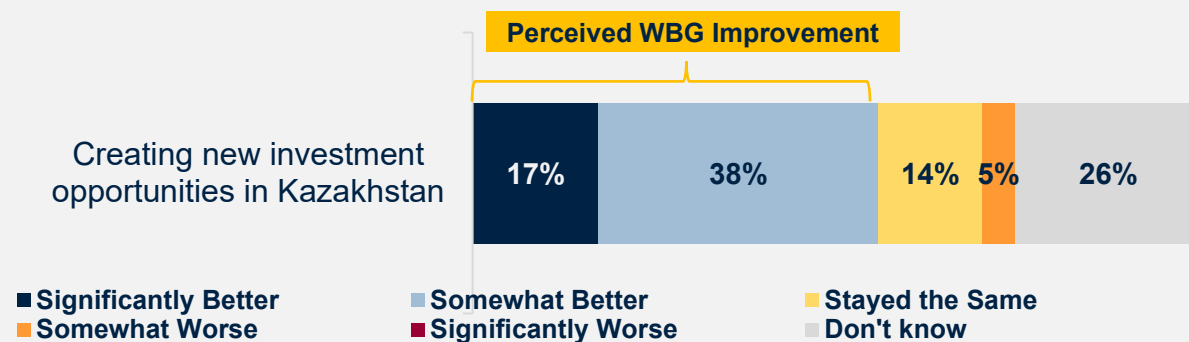
Scale: 1 Not effective at all – 10 Very effective

[If effectiveness rating < 5] How could the WBG be more effective in facilitating civil society participation in development policy dialogue and implementation?

(Please be specific) (N=12) [If effectiveness rating > 4] Please share examples of the WBG's effective facilitation of civil society participation in development policy dialogue and implementation. (Please be specific) (N=25)

The WBG Working With the Private Sector

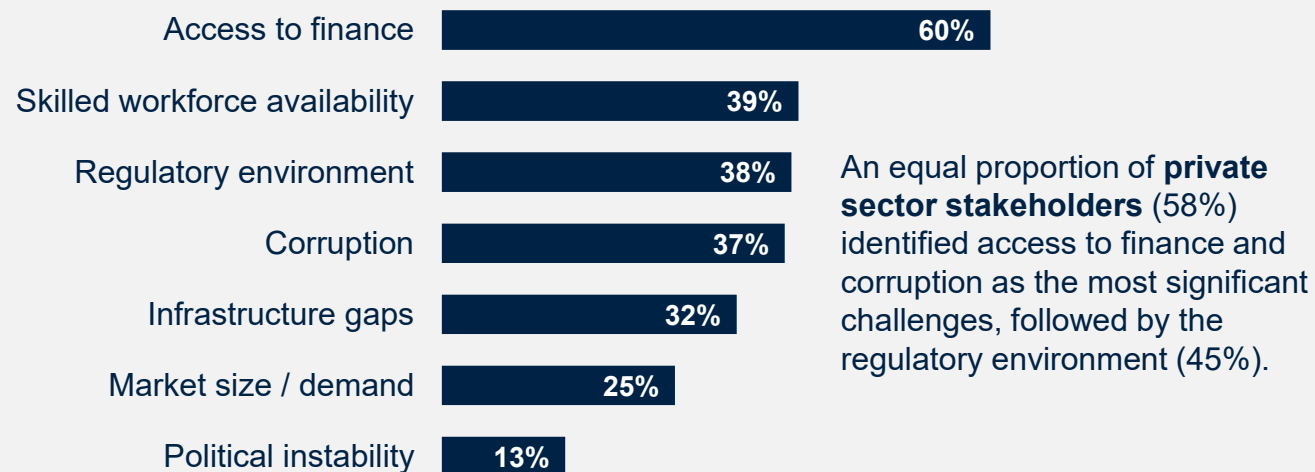
Based on your experience, in the past four years, how has the WBG changed in terms of...



To Make the WBG More Effective in Private Sector Development, Respondents Discussed:

- Increase funding for SME development and startups
- Raise awareness and disseminate global best practices
- Support infrastructure development, including digitalization

What are the biggest challenges facing private sector development in Kazakhstan?



Based on your experience, in the past four years, how has the WBG changed in terms of...(Percentage of Respondents, N=133)

What are the biggest challenges facing private sector development in Kazakhstan? (Select up to 3) (Percentage of Government & Private Sector Respondents, N=134)

What is the most important thing the WBG could do to increase its effectiveness in these priority areas in Kazakhstan? (Please be specific) (N=88)



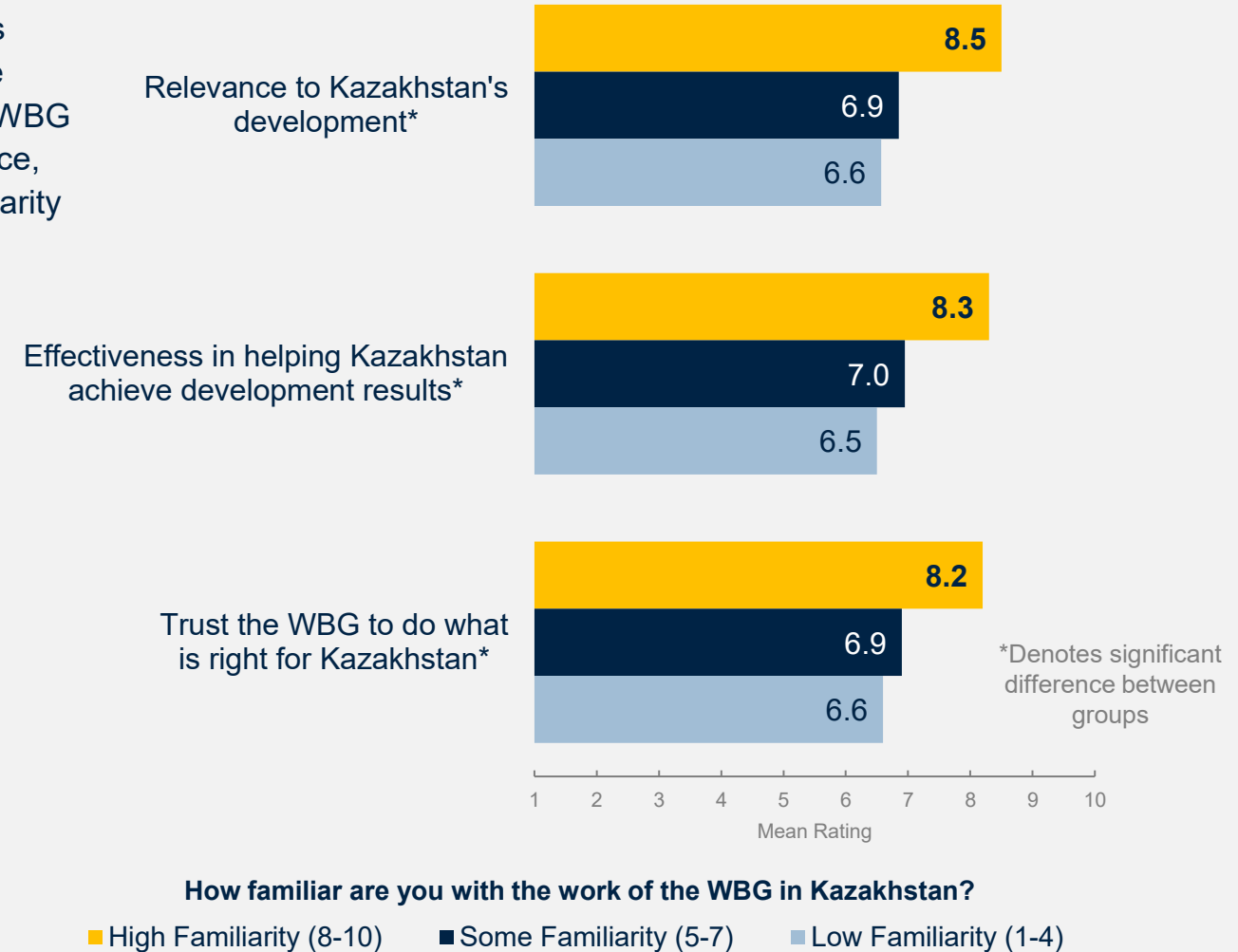
Communication and Outreach



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Outreach and Engagement Is Important Because Familiarity Leads to More Positive Perceptions

Greater engagement with the WBG not only meets stakeholder demand but also fosters more positive perceptions. Stakeholders highly familiar with the WBG (ratings of 8–10) consistently rate its trust, relevance, and effectiveness higher than those with low familiarity (ratings of 1–4).



WBG Events/Conference/Workshops Are Stakeholders' Main Preference for Receiving Information from the Institution

Stakeholder preferences vary and should inform targeted outreach. While the majority of respondents favored WBG events, conferences, or workshops, respondents from civil society and local government gave their preference to the WBG website. E-Newsletters were especially popular among the private sector, academia, and media respondents.

	All Respondents	Government Institutions	Local Government	Bilateral /Multilateral Agency	Civil Society	Private Sector	Academia	Media
WBG event / conference / workshop (in person or online)	52%	63%	30%	50%	45%	54%	50%	52%
Direct contact with WBG staff (e.g., in person, virtually, phone, email)*	39%	40%	15%	67%	24%	44%	37%	38%
WBG e-Newsletters*	38%	38%	10%	39%	15%	49%	43%	57%
WBG website (including blogs)*	31%	17%	80%	22%	70%	32%	24%	14%
WBG publications	25%	26%	5%	22%	12%	24%	35%	24%
WBG social media channels (e.g., Facebook, LinkedIn, Instagram, Twitter/X)	22%	24%	10%	11%	24%	20%	33%	10%
WBG direct messaging (e.g., WhatsApp, Telegram)*	21%	17%	0%	22%	12%	34%	20%	33%
WBG podcasts	7%	12%	0%	0%	6%	10%	7%	0%

Top Two Preferred WBG Channels



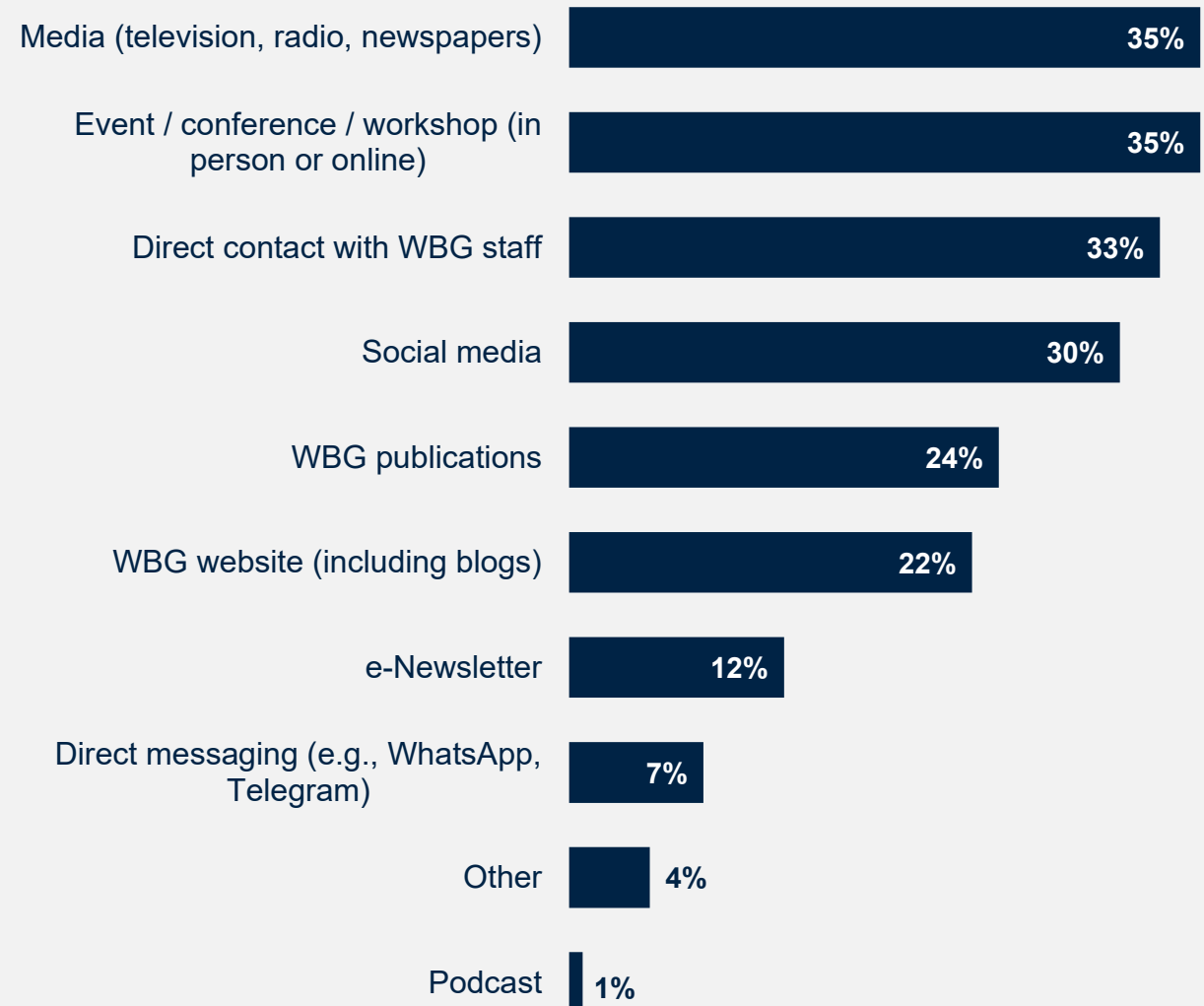
How would you prefer to obtain information from the WBG? (Select up to 3) (Percentage of Respondents, N=272)

*Denotes significant difference between stakeholder groups

49% of Respondents Recalled Seeing or Hearing About the WBG, Recently, Most Often through the Media, WBG Events, and Direct Contact with WBG Staff

WBG events were the top preferred and among the most frequently recalled information channels.

Notably, only 12% of respondents recalled the **e-Newsletter**, despite it ranking third in preference for receiving information from the WBG (see the previous slide), especially among media, private sector, and academia stakeholders.



To Better Understand the WBG's Role in Kazakhstan, Stakeholders Wanted Information on Case Studies of WBG Projects and WBG Research and Knowledge

Top Two Types of Preferred Information About the WBG

	All Respondents	Government Institutions	Local Government	Bilateral /Multilateral Agency	Civil Society	Private Sector	Academia	Media
Case studies of WBG projects	51%	51%	47%	61%	42%	49%	53%	48%
WBG research and knowledge	48%	50%	24%	44%	33%	49%	60%	48%
Impact assessments and evaluations	39%	40%	47%	56%	42%	33%	28%	43%
Sector-specific strategies	31%	33%	12%	28%	18%	41%	32%	24%
Overview of WBG financial products and services*	29%	23%	35%	22%	48%	41%	19%	19%
Regular updates on WBG activities	25%	20%	35%	28%	33%	23%	28%	29%
Information on how to work / partner with WBG	20%	13%	12%	17%	21%	28%	23%	29%



What information would be most helpful to you in understanding the WBG's role in Kazakhstan? (Select up to 3)
(Percentage of Respondents, N=265) *Denotes significant difference between stakeholder groups

*Denotes significant difference between stakeholder groups



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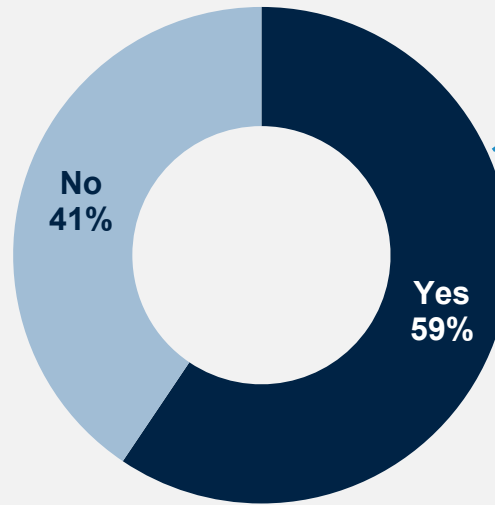
Sample Demographics and Detailed Methodology



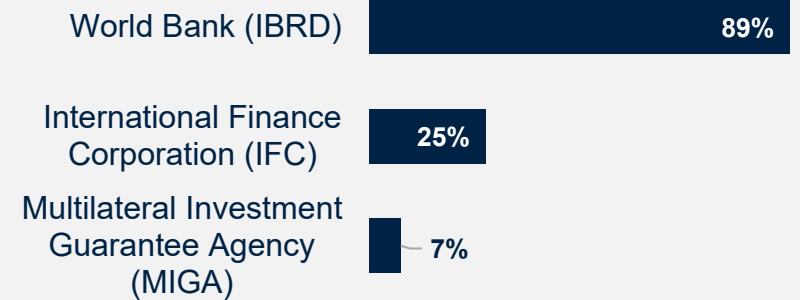
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Sample Demographics

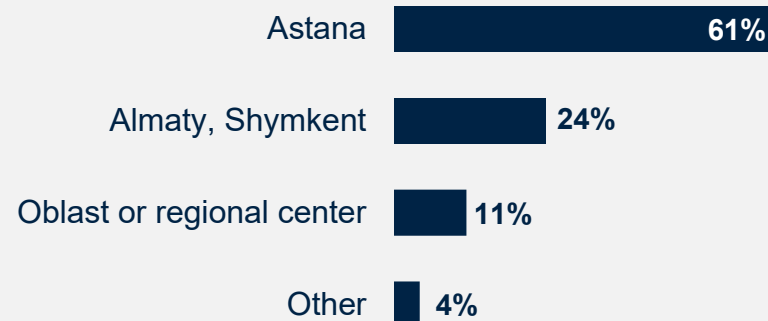
In the past 4 years, have you worked or collaborated with the WBG in Kazakhstan?
(N=281)



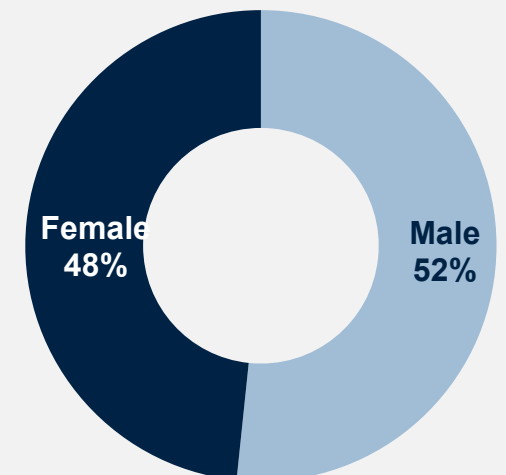
Which of the following WBG agencies have you worked or collaborated with in Kazakhstan?
(N=167)



Which best represents your geographic location?
(N=273)

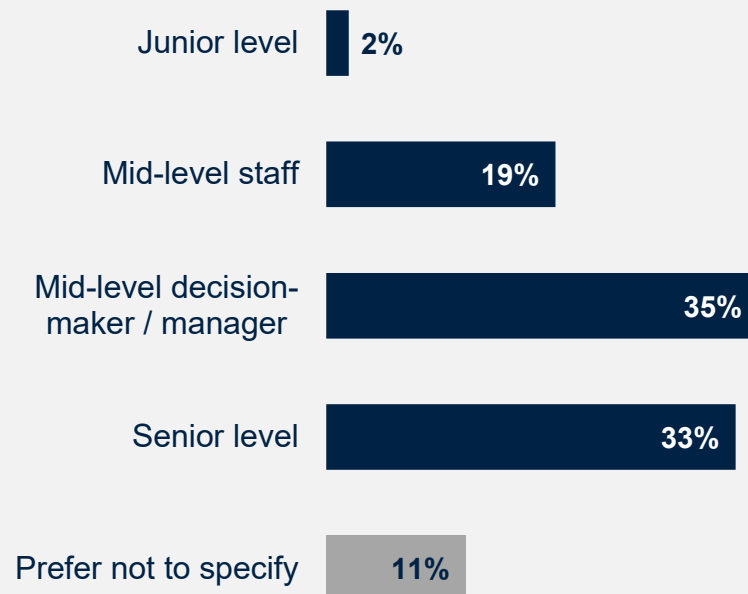


What is your gender?
(N=273)

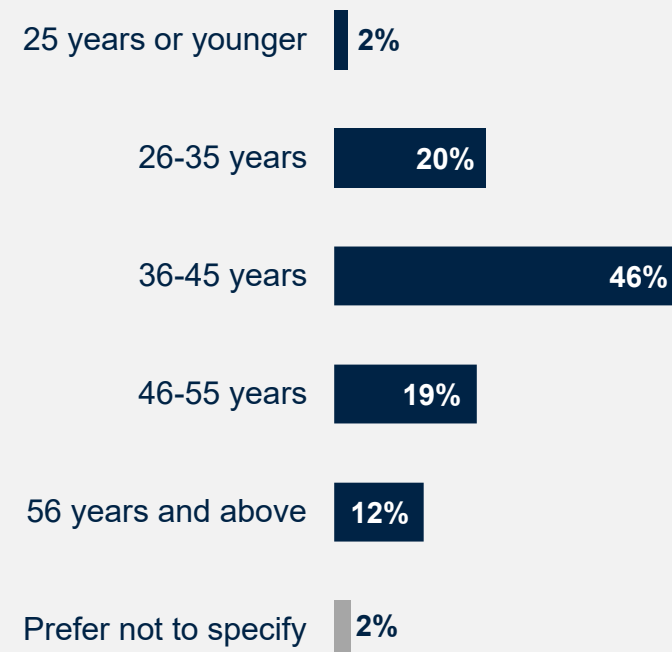


Sample Demographics (continued)

*Within your organization,
would you describe yourself as...*
(N=273)



What's your age?
(N=273)



Detailed Methodology

From **February to April 2025**, a total of 603 stakeholders in Kazakhstan 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 government institutions, local government, bilateral or multilateral agencies, civil society organizations, the private sector, academia and research centers, and the media.

Of these stakeholders, **281 participated in the survey (47% response rate)**. Respondents received the questionnaire via courier and returned it, accordingly, or completed it online, or completed it with a representative of the field agency.

This year's survey results were compared to the FY21 Country Opinion Survey, which had a response rate of 63% (N=368).

Comparing responses across Country Opinion Surveys reflects changes in attitudes over time, as well as changes in respondent samples, methodology, and the survey instrument itself. To reduce the influence of the latter factor, only those questions with similar response scales/options were analyzed. However, the stakeholder compositions for both survey years should be taken into consideration when interpreting these comparisons.

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

Percentage of Respondents	FY 2021	FY 2025
Government Principals: Office of the President, Prime Minister, Minister, Parliamentarian	2%	4%
Government Institutions: Employee of a Ministry, Department, Project Implementation Unit, Independent Government Institution, Judiciary, State-Owned Enterprise	47%	29%
Local Government	1%	8%
Bilateral/Multilateral Agency: Embassy, Development Organization, Development Bank, UN Agency	7%	7%
Civil Society Organization: Local and regional NGO, Community-Based Organization, Private Foundation, Philanthropy, Professional/Trade Association, Faith-Based Group, Youth Group	10%	12%
Private Sector: Private Company, Financial Sector Organization, Private Bank	10%	15%
Academia / Research Center	17%	17%
Media	4%	8%
Other	2%	1%
Total Number of Respondents	365	281



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.



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Detailed Methodology (continued)

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

Please note that not all questions were asked of every respondent in FY25. Some questions—particularly those requiring more in-depth knowledge of WBG projects and operations—were only presented to a subset of stakeholders. Consequently, for year-over-year comparisons, some FY21 means shown in this report are based only on the subset of respondents who received the same questions in FY25, rather than the full FY21 sample. As a result, these means may differ from those published in the original FY21 report. Please refer to the questionnaire for details on question routing. The questionnaire is published in the WBG Microdata Library, along with the survey microdata, appendices, and this report.

The open-ended comments to this survey were analyzed with ChatGPT, a generative AI tool, and reviewed by the World Bank staff for accuracy.



Country Opinion Surveys

Thank you

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

countrysurveys@worldbankgroup.org

