Country Opinion Surveys

FY 2026 South Africa

Country Opinion Survey Report

WORLD BANK GROUP

ECR Business Intelligence Team | April 2026

Acknowledgements

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

The CER Analytics team acknowledges the significant contributions from the South Africa country team and the independent field agency Ipsos. In particular, CER Analytics is grateful for the support from Lavinia Thoriso Engelbrecht (Senior External Affairs Officer), Carol Wambugu (Senior Operations Officer), and Oarabile Minky Moilwa (Consultant), who coordinated the survey-related activities from Pretoria, South Africa.

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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 South Africa perceive the WBG. The survey explored the following questions:

1. **Overall Views of the WBG:** How familiar are stakeholders with the WBG? How much trust do stakeholders have in the WBG? What are their opinions on the WBG's effectiveness and relevance to development in South Africa? Are these perceptions improving or declining?

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 effective have WBG-supported projects or initiatives been in creating sustainable, long-term jobs in South Africa? How have these projects affected people in South Africa, and how could the WBG improve its effectiveness?

3. **WBG Instruments:** What do key stakeholders value most about the WBG's work in South Africa? What are their views on the WBG's financial instruments and knowledge products? Has the WBG's advice influenced any new or existing policies in government or the private sector—particularly government policies related to employment and job creation?

4. **The WBG's Engagement and Collaboration:** How effective is the WBG in collaborating with different stakeholder groups in South Africa? Are these perceptions of the WBG's collaboration improving or declining? How effective has the WBG been in partnering with the government and the private sector to improve the business environment and support business development in South Africa?

5. **Communications:** What communication channels do stakeholders prefer for receiving information from the WBG, and do these preferences vary across stakeholder groups? To what extent do stakeholders recall WBG messaging? Which key topics communicated by the WBG are most recalled by stakeholders? What types of information are stakeholders seeking from the WBG?

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Methodology Overview

Fielded in September 2025 – February 2026

- 837 potential participants were asked to complete the survey
- Respondents received the questionnaire in person or completed it online
- A list of names was provided by the WBG country team
- Data collection managed on the ground by independent firm

333 participants (40% response rate)

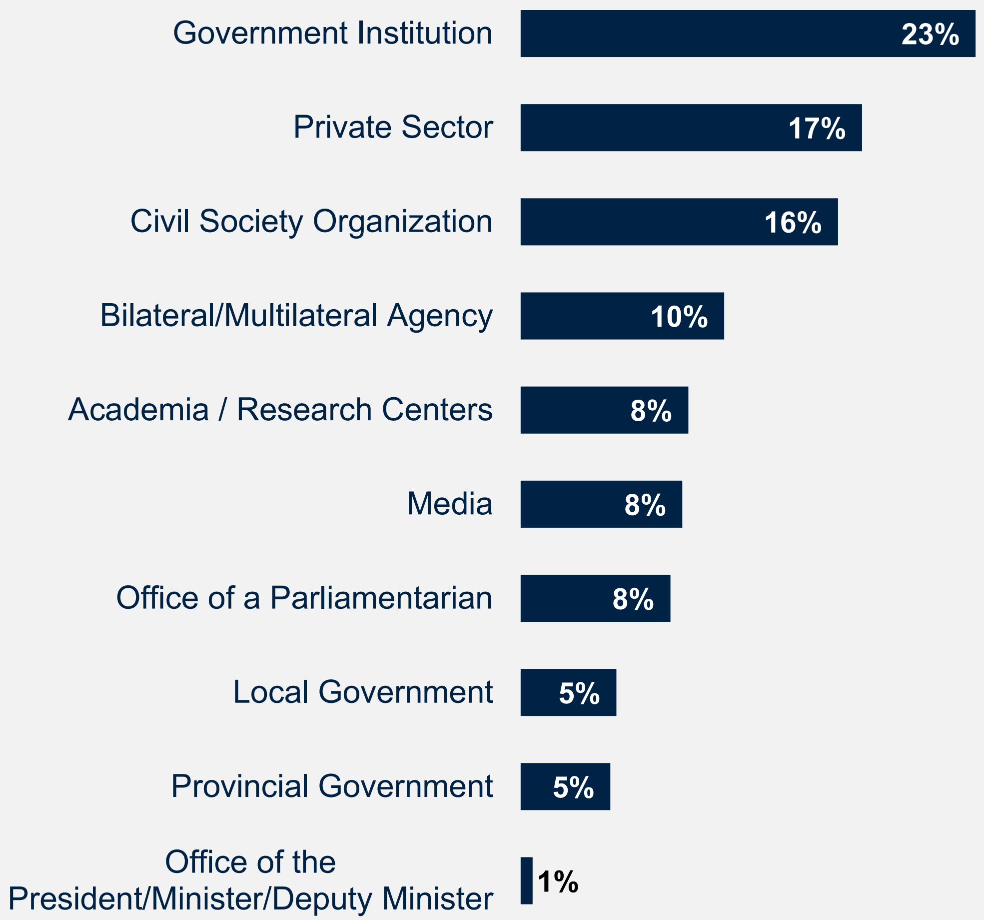
- 25% from Gauteng, 21% from Western Cape
- 62% have collaborated with the WBG within the past 3 years

Compared to the FY23 Country Survey Results

- 310 participants (24% response rate)
- 61% from KwaZulu-Natal, 25% from Gauteng
- 34% collaborated with the WBG

Click here for details of the Respondent Sample and Methodology.

Stakeholders in FY26 COS Sample



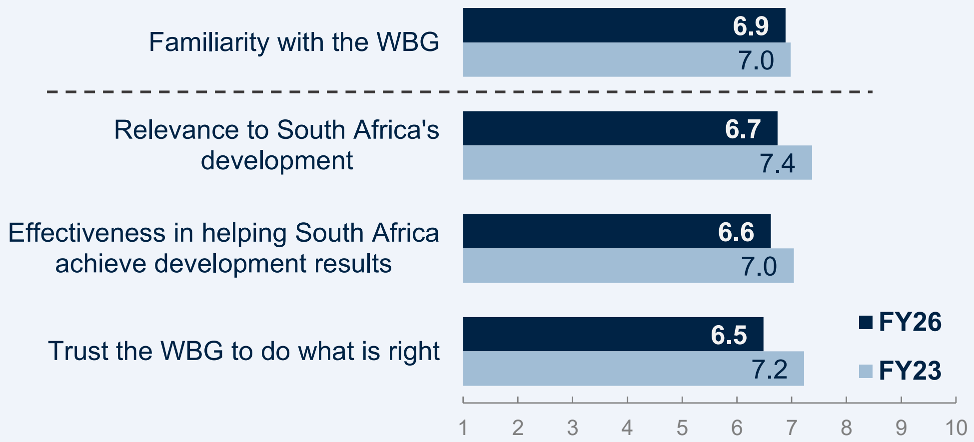
What is your primary professional affiliation? (Select only 1 response) (Percentage of Respondents, N=333)

Executive Summary

1. Overall Views of the WBG:

In FY26, stakeholders' familiarity with the WBG's work in South Africa remained consistent with the FY23 Country Survey results. Respondents from the Parliament and those who collaborated with the WBG reported significantly higher levels of familiarity than non-collaborators. Trust in the WBG to do what is right for South Africa declined significantly since FY23, falling to moderately positive levels (6.5 out of 10), though the WBG remained among the more trusted institutions in South Africa, above the IMF and other UN agencies. Stakeholder perceptions of the WBG's relevance to South Africa's development and its effectiveness in helping the country achieve development results also declined significantly since FY23, with both indicators falling to moderately positive levels (below 7 on a 10-point scale).

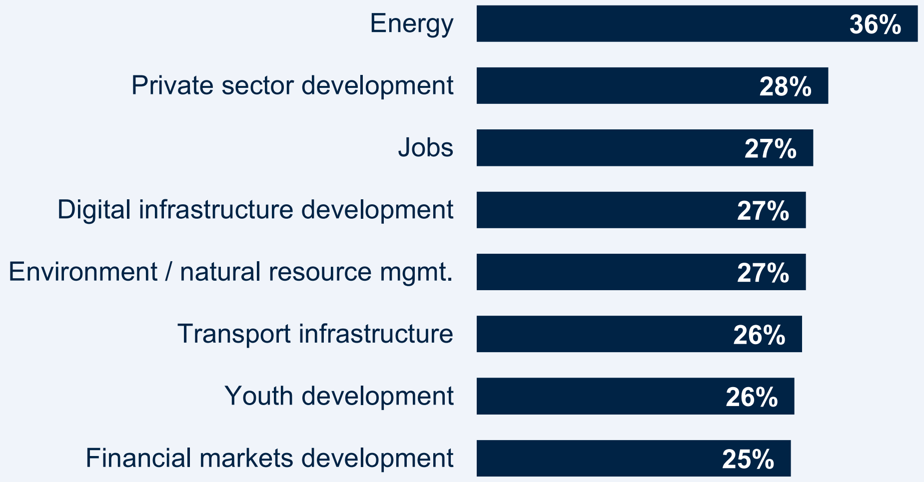
Compared to other countries, stakeholder ratings on all three key performance indicators in South Africa were lower than ratings in other Eastern and Southern Africa countries and IBRD countries surveyed in FY25.



2. The WBG's Work on Development Priorities:

Energy, private sector development, jobs, digital infrastructure, and environment/natural resource management are the top development areas stakeholders believe the WBG should prioritize in South Africa. Notably, while energy, private sector development, and job creation remain top priorities, the perceived importance of transport and digital infrastructure has more than doubled among respondents in FY26 compared to FY23, alongside a slight decrease in the urgency of health.

Respondents emphasized that in the future, the WBG needs to prioritize job creation and economic growth through robust support for private sector development, including assistance for small and black-owned businesses. They also highlighted the need for foundational investments in infrastructure and human capital, such as energy, transport, and water systems, alongside a focus on education and skills development. Furthermore, respondents called for a concerted effort to improve governance and institutional capacity to combat corruption and enhance service delivery.



Executive Summary (continued)

3. WBG's Operational Effectiveness:

Among clients who engaged with the WBG on specific projects in South Africa, perceptions of its effectiveness were mixed. While 46% of respondents gave the WBG high marks (8-10) for its helpfulness in achieving project goals, this figure was notably lower than the regional average of 69%. Similarly, only about 40% of clients in South Africa rated the WBG as highly effective in creating sustainable, long-term jobs through its projects. Energy/electricity was the most frequently cited area of WBG engagement.

Respondents indicate that the WBG's impact in South Africa is most visible through financial support, infrastructure development, and energy sector interventions—particularly in reducing load shedding, expanding renewable energy, and improving basic services such as water, transport, and municipal systems. These efforts are widely associated with job creation, economic growth, and improved living standards, although some respondents note that impacts are uneven, sometimes insufficiently tailored to local needs, and constrained by broader structural challenges. Notably, bilateral and multilateral agencies were the most critical in rating how well WBG's expertise is adapted to the country context (mean=5.9).

In written comments, respondents emphasized that improving the WBG's operational effectiveness in South Africa requires faster, more agile processes and reduced bureaucracy, particularly in project approval, implementation, and internal coordination. According to respondents, there is also the need to shift from a focus on project inputs and lending volumes toward measurable, long-term development outcomes, supported by stronger monitoring, transparency, and accountability mechanisms. Many highlighted concerns about inefficiencies, including delays, complex procedures, and insufficient oversight of how funds are used. Respondents also stressed the importance of better aligning projects with local context through deeper engagement with government, civil society, and the private sector, as well as greater use of local expertise. Strengthening institutional and implementation capacity, especially at subnational levels, is seen as critical to ensuring that projects are effectively delivered and reach intended beneficiaries.

As for external factors that affect development outcomes, corruption and poorly designed reforms were cited as the top barriers to economic and social reforms in South Africa, while the availability of skilled workforce, market size, and access to finance were identified as the biggest challenges facing private sector development.

4. WBG Instruments:

Financial resources remained the most valued WBG instrument in South Africa (65%), and perceptions of these instruments—including the timeliness of financial support—stayed moderately positive, with no significant change compared to FY23. Respondents emphasized the need for the WBG to improve financial instruments and targeting and better integrate financing with technical expertise and results-based approaches.

When asked about their use of the WBG's knowledge work, a large majority of respondents (83%) reported that they had used WBG knowledge within the past three years, with research and analytical reports being the most widely used products. Overall, perceptions of the quality of the WBG's knowledge work were positive (mean=7.2), although somewhat lower than the regional average (mean=7.5), and perceptions of its contribution to development results have declined (33% noted high contribution in FY26 vs. 47% in FY23).

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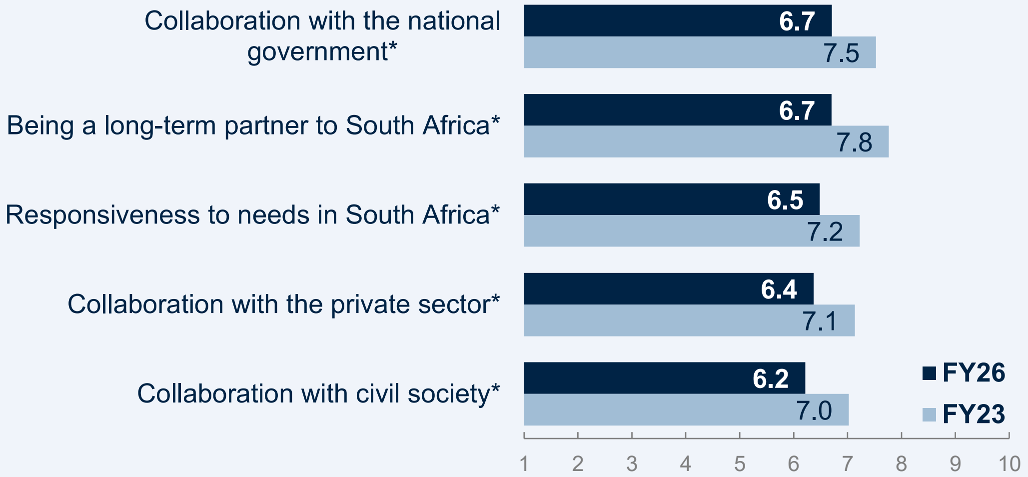
Executive Summary (continued)

5. The WBG's Engagement and Collaboration:

In FY26, perceptions of the WBG's collaboration effectiveness declined significantly across all partner groups. Collaboration with the national government received the highest rating (6.7 out of 10) but also registered a significant decline. Ratings for collaboration with all other groups, including local governments, the private sector, academia, civil society, and other donors, were moderate (in the 6.2–6.4 range). Respondents from the Parliament were the most positive about the effectiveness of WBG's engagement across the groups, particularly with the national government (mean=7.3).

To improve the effectiveness of collaboration with government stakeholders, respondents suggest the WBG should strengthen country partnership frameworks, provide targeted technical support to address state capacity constraints, align its support with government priorities, and shift from a project-based approach to an outcomes-driven model that tracks tangible, long-term development results rather than loan volumes or project outputs.



In addition to the national government, stakeholders would like the WBG to expand its collaboration with the private sector (26%), private foundations and philanthropic groups (23%), and youth organizations (21%). Respondents call for deeper private sector engagement through formal mechanisms that mobilize investment in energy, infrastructure, and small business development. Civil society and community groups are seen as underutilized partners whose involvement is essential for local ownership and sustainability. Across all stakeholder groups, respondents urge a shift from superficial consultation to genuine co-design, underpinned by shared measurable targets, greater use of local expertise, and a focus on long-term outcomes over project outputs.

6. Communications:

WBG events and conferences (63%), direct contact with WBG staff (56%), and social media channels (41%) are the preferred ways for stakeholders to receive information from the WBG. Sixty percent of respondents recalled seeing or hearing about the WBG recently, most commonly through events (40%), direct contact with staff (31%), and traditional media channels (31%). Note that, while social media were among the top preferred channels, only 26% of respondents recalled seeing information about the WBG there.

The most frequently recalled WBG messages relate to the Bank's mission to end poverty (35%), education and skills development (33%), women empowerment (33%), energy (32%), and job creation (31%). When it comes to information needs, stakeholders in South Africa most valued WBG research and knowledge (47%), regular updates on WBG activities (45%), and information on how to work and partner with the WBG (44%).

Overall Views of the World Bank Group

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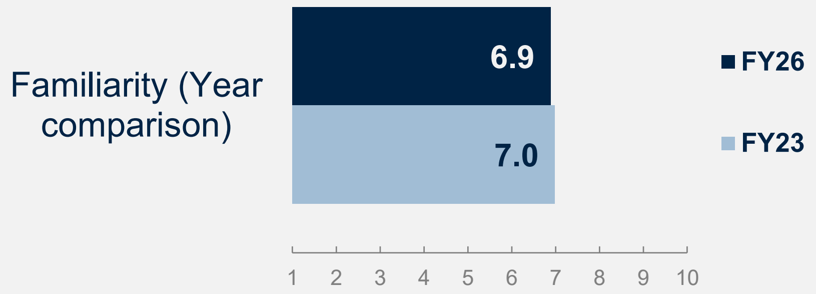
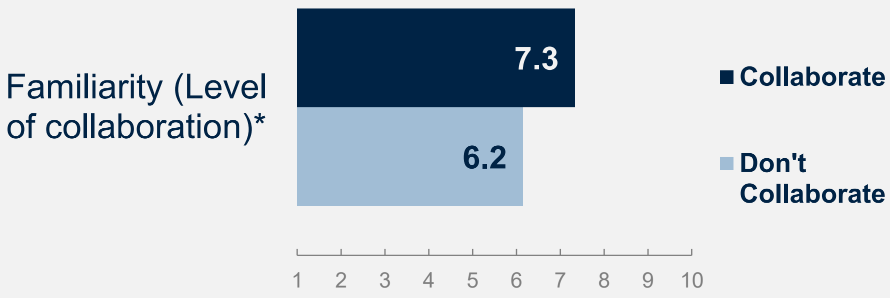
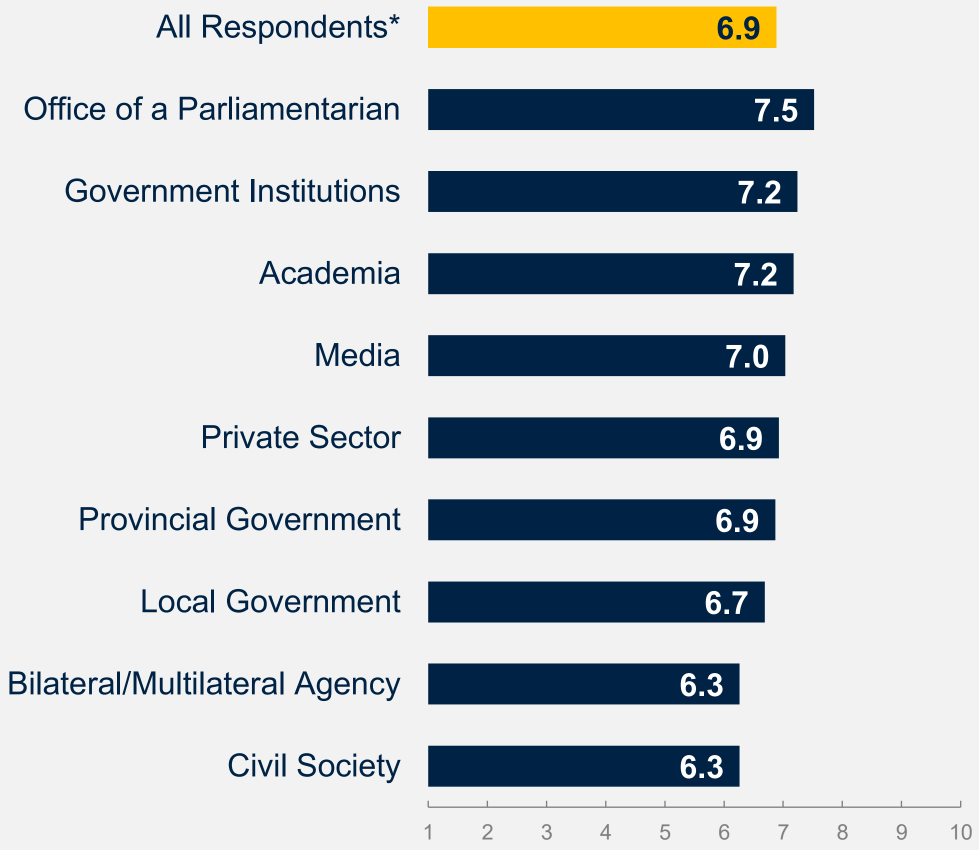
Familiarity with the WBG is Consistent with FY23, With Government Respondents and Those who Collaborate Being Significantly More Familiar

Q: *How familiar are you with the World Bank Group's work in South Africa? 1=Not familiar at all; 10=Very familiar (Mean is reported)*







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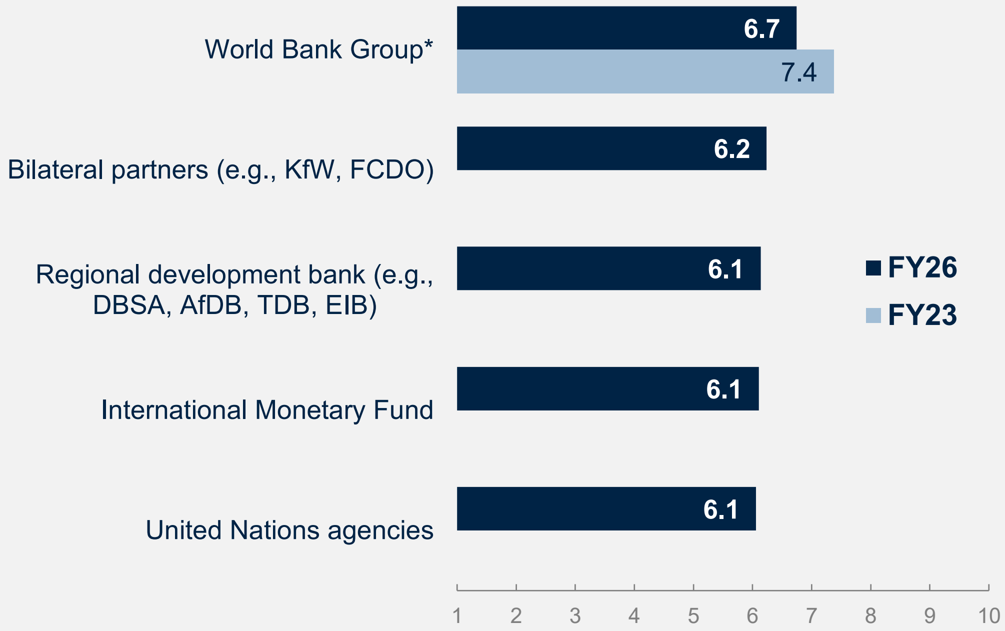
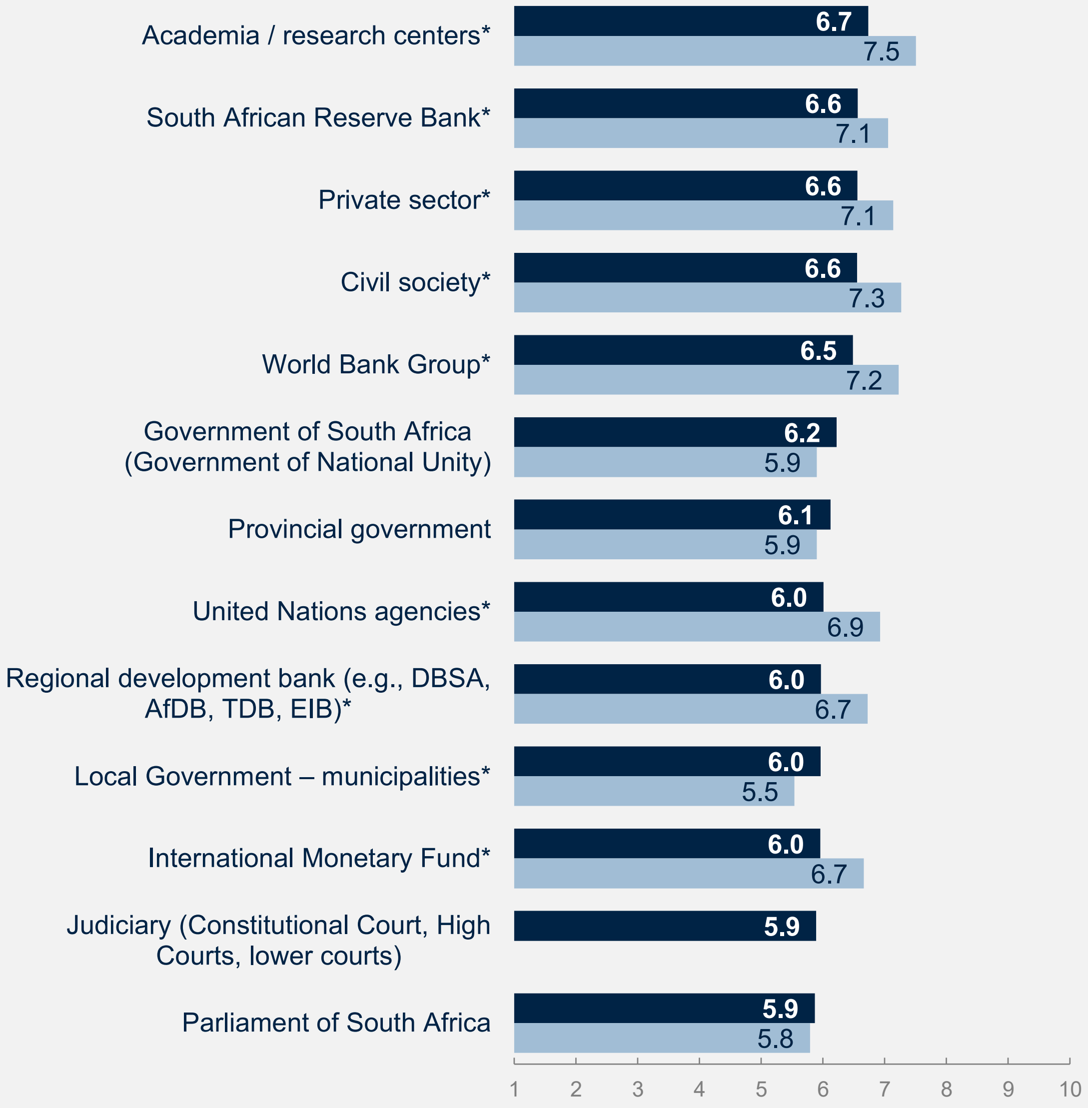
* Denotes significant differences between groups

Perceptions of the WBG Have Declined Since FY23, With Trust and Relevance Ratings Falling

Q: *How* ***relevant*** *is each of the following organizations to South Africa's development? 1=Not at all; 10=Very much (Mean is reported)*



Q: *How much do you* ***trust*** *each of the following institutions to do what is right for South Africa? 1=Not at all; 10=Very much (Mean is reported)*



* Denotes significant differences between years

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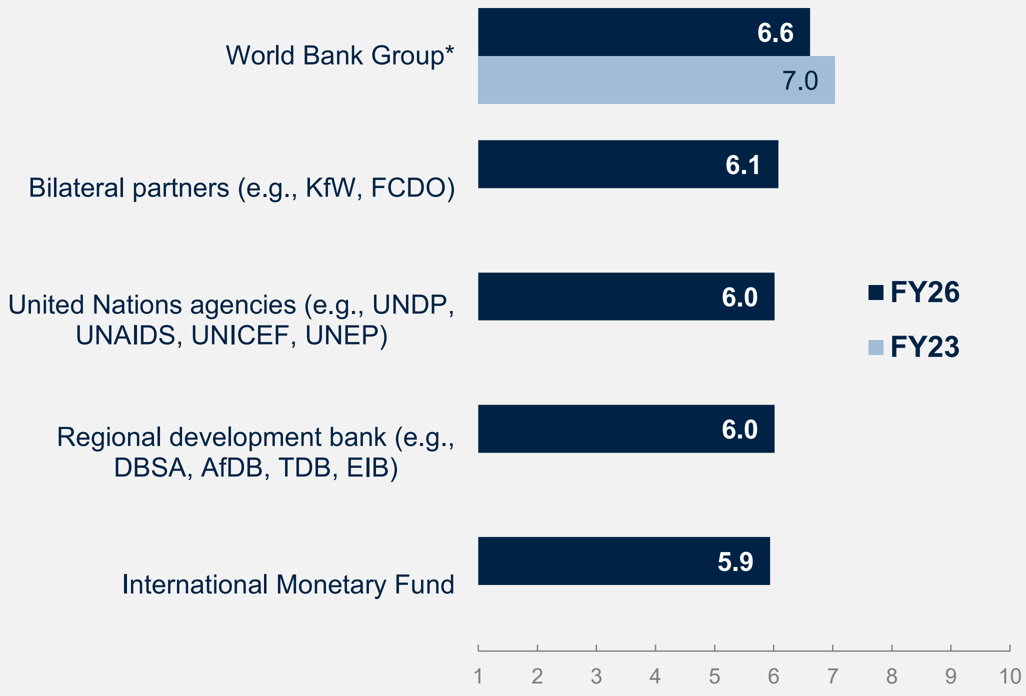
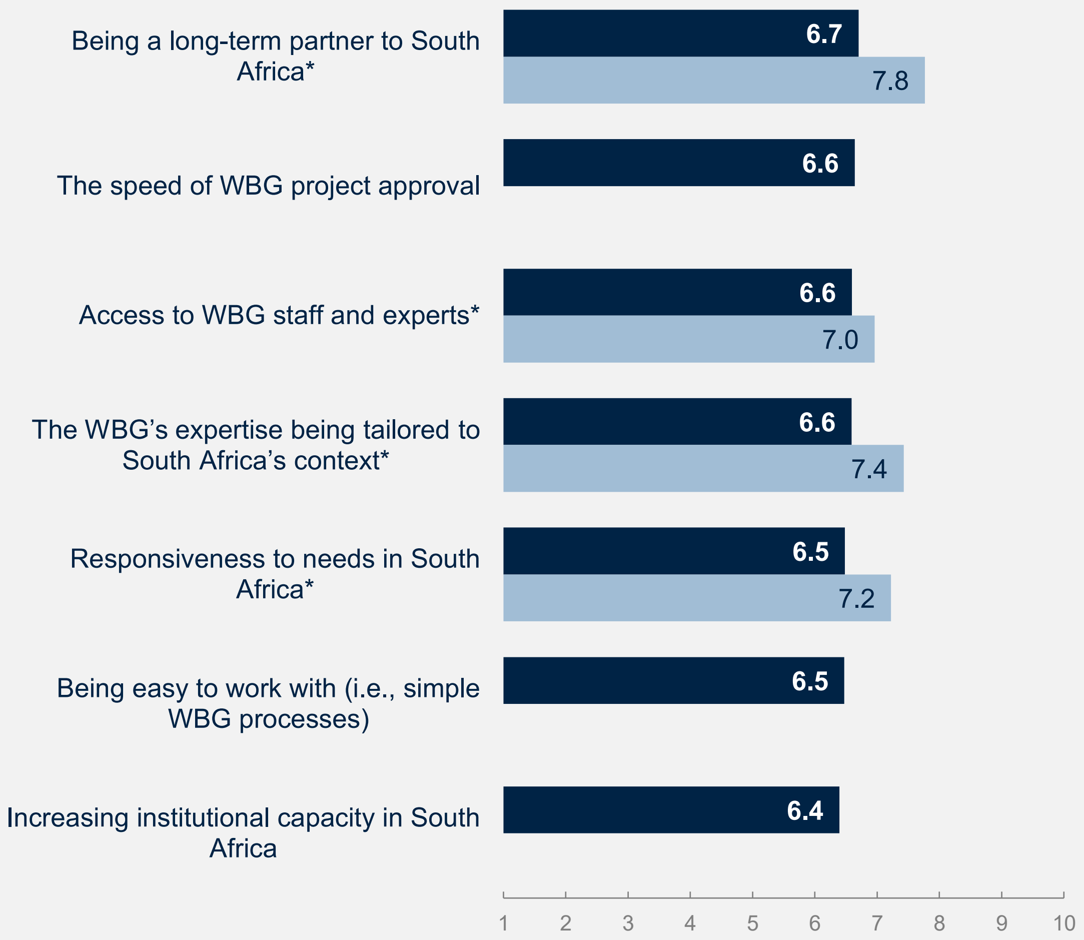
Perceptions of WBG Effectiveness Have Declined Across All Dimensions Since FY23

Q: *How **effective** is each of the following organizations in helping South Africa **achieve development results**? 1=Not at all; 10=Very much (mean is reported)*



Q: *How effective is the WBG in terms of the following? 1=Not effective at all; 10=Very effective (Mean is reported)*



* Denotes significant differences between years

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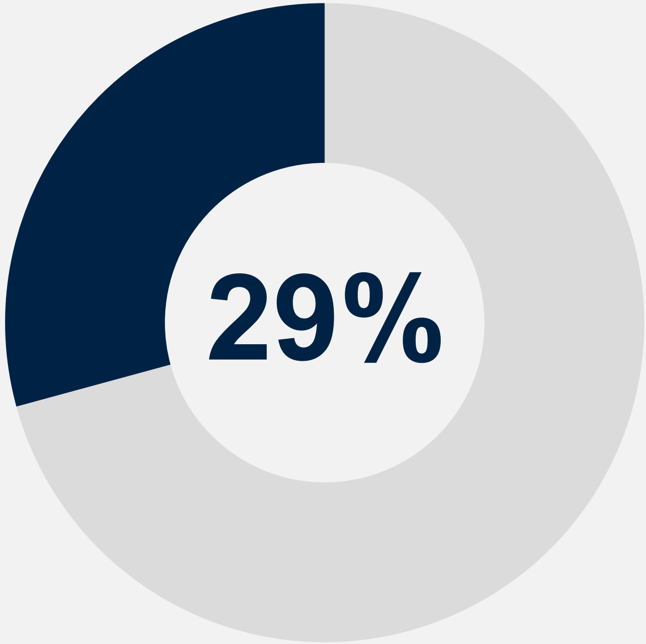
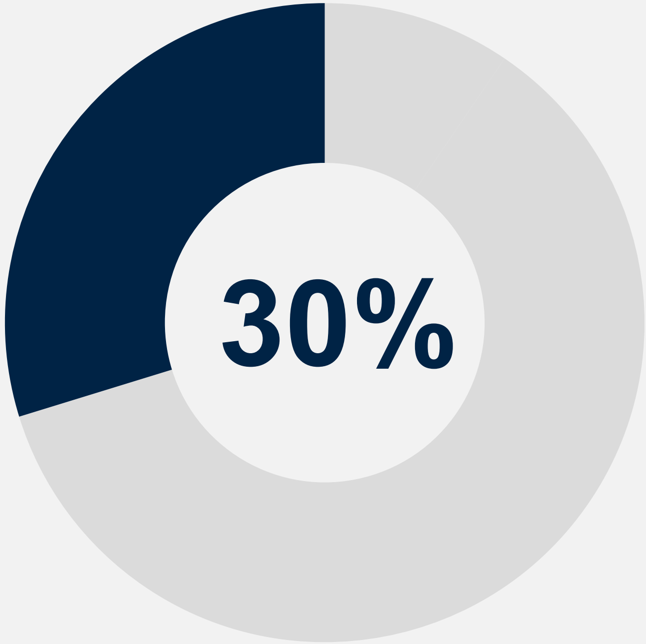
About One-Third of Respondents Say WBG Effectively Supports Better Job Creation

Q: *Creating more and better jobs in client countries is a top priority for the WBG.* ***How effective*** *is the WBG at…*
1=Not effective at all; 10=Very effective

Helping create the **conditions** for more and better jobs in South Africa *(% rating – 8-10 on a 10-point scale)*

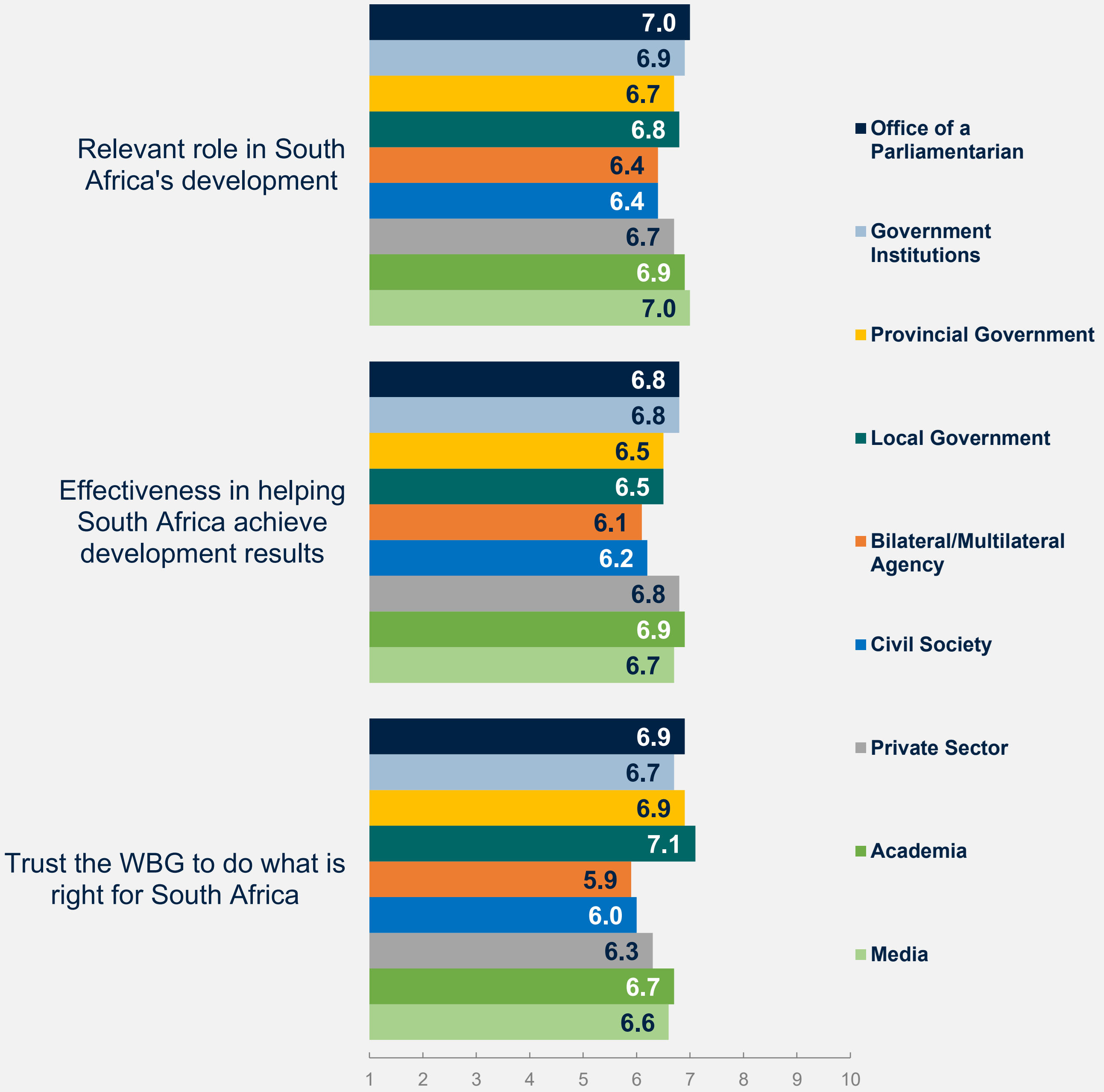


Aligning its support for job creation to the national priorities in South Africa *(% rating – 8-10 on a 10-point scale)*



Stakeholder Perspectives on KPIs Vary, but Differences Are Not Statistically Significant

Comparisons of ratings for trust, relevance, and effectiveness between stakeholder groups show that **respondents from local government** gave the highest trust ratings, while the **office of a parliamentarian and media** gave the highest relevance ratings, and **academia** gave the highest effectiveness rating. Respondents from **bilateral/multilateral agencies and civil society** tended to give lower ratings across all three KPIs, but the differences weren't statistically significant.



For question wording and scales, please see previous slides.

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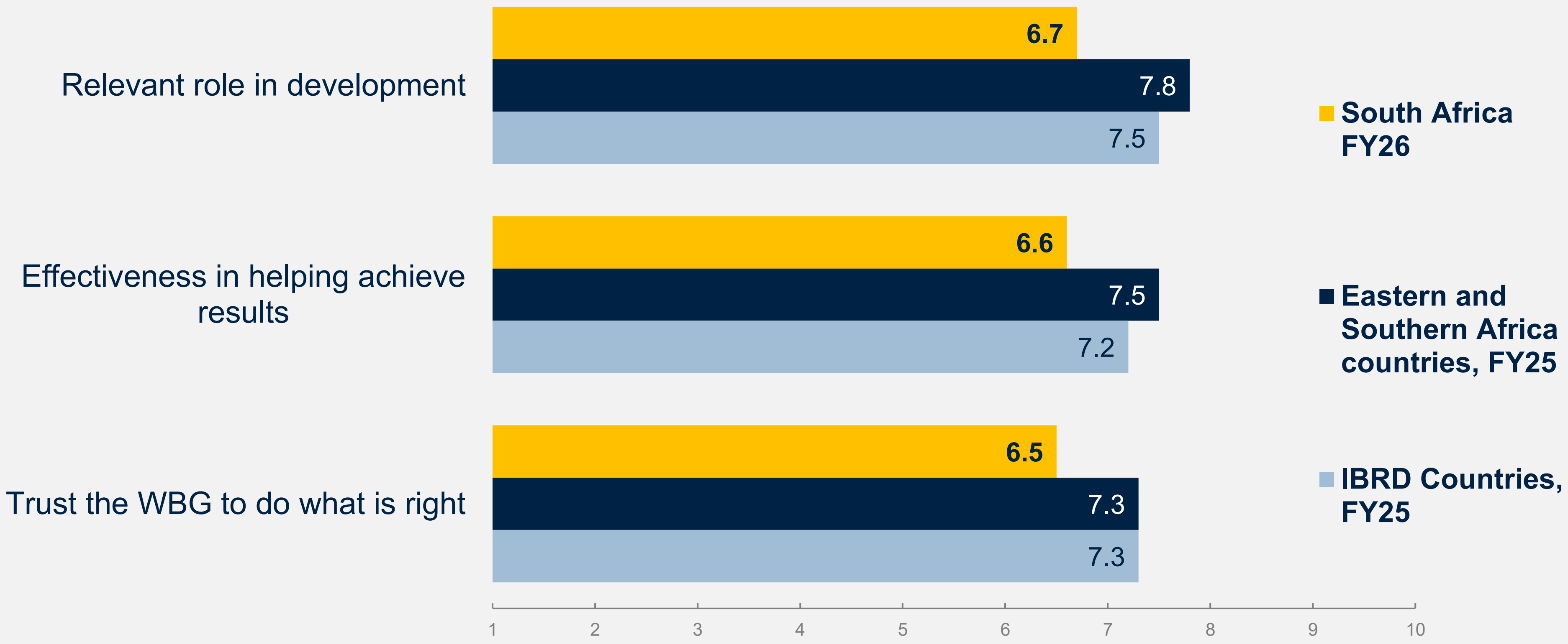
KPI Ratings in South Africa Are Below Eastern and Southern Africa and IBRD Countries Surveyed in FY25



Eastern and Southern Africa countries in FY25 included: Angola, Botswana, Dem. Rep. of Congo, Eswatini, Ethiopia, Madagascar, Malawi, Mauritius, Rwanda.
IBRD FY25 countries included: Angola, Argentina, Bolivia, Botswana, China, Colombia, Ecuador, Gabon, Guatemala, India, Indonesia, Iraq, Jordan, Kazakhstan, Mauritius, Mexico, Panama, Peru, the Philippines, and Thailand.

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The WBG’s Work on Development Priorities

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WBG: Focal Development Areas

Energy, private sector development, and job creation remain top priorities in South Africa. Notably, transport and digital infrastructure have more than doubled in importance for respondents in FY26 compared to FY23, while health has seen a slight decline in urgency.

In open-ended comments, respondents identify several priority sectors for job creation in South Africa:

Respondents want the WBG to prioritize **job creation and economic growth** by collaborating with the private sector, supporting small businesses, and cutting the cost of doing business.

They also emphasized the need for investment in **critical infrastructure**, particularly in the energy and transport sectors, to support the economy and improve service delivery.

Another major theme was improving **governance** by helping to reduce corruption and strengthening the capacity of government at all levels to be more effective.

Finally, there were calls for the WBG to support **education and skills development** to better align training with the needs of the labor market.

Q: *Which areas should the WBG prioritize to have the most impact on development results in South Africa? Select up to 5 (%)*

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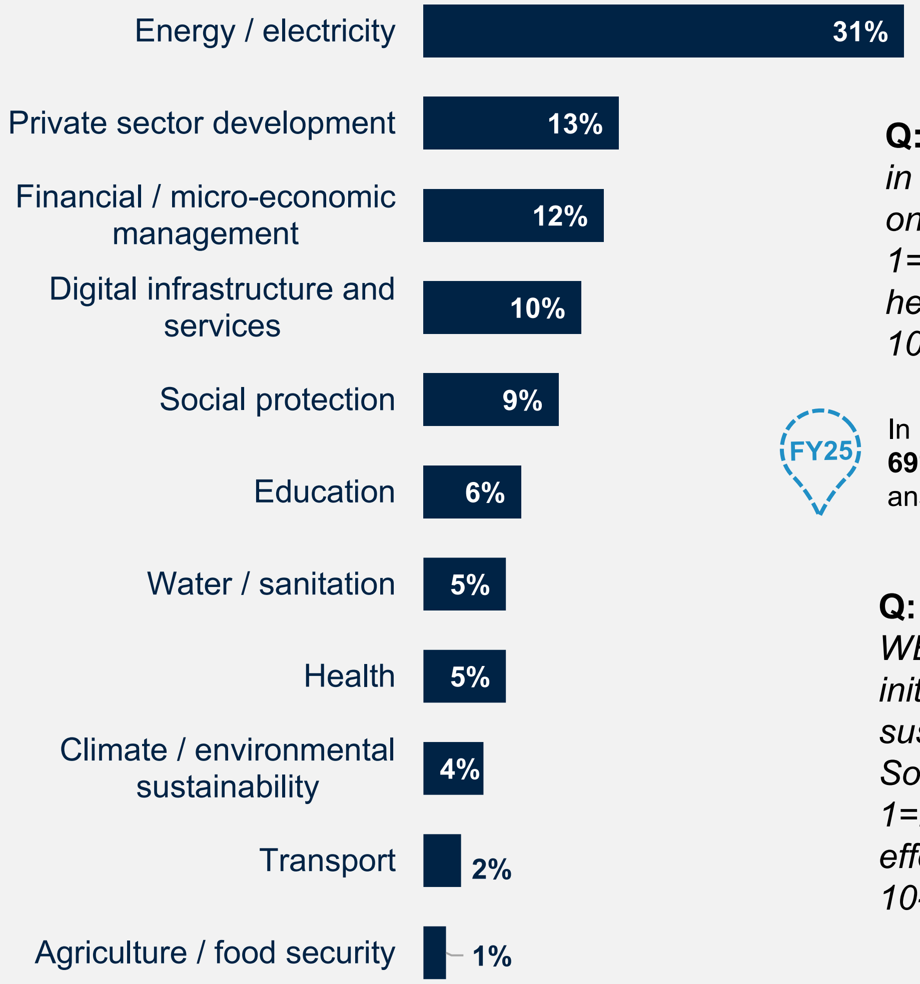
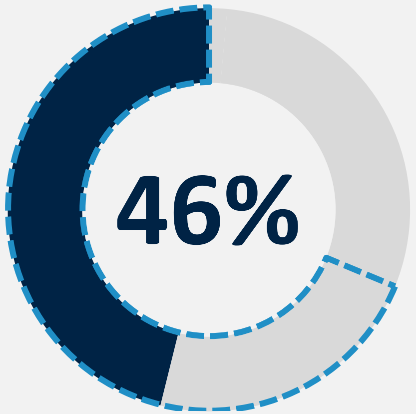
Just Under Half of WBG Clients in South Africa Rate WBG as Helpful in Achieving Project Goals

Q: *Please select the development area that was the primary focus of this WBG-supported project or initiative. Select ONE only (%)*



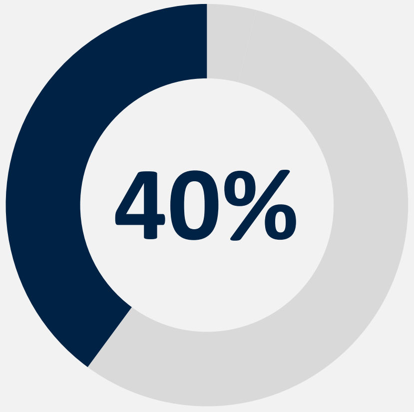
Q: *How helpful was the WBG in achieving the goals of this one project or initiative? 1=Not helpful at all; 10=Very helpful (% rating – 8-10 on a 10-point scale)*



FY25

In FY25, in AFE region, on average **69%** of stakeholders selected 8-10, answering this question

Q: *How effective has this WBG-supported project or initiative been at creating sustainable, long-term jobs in South Africa? 1=Not effective at all; 10=Very effective (% rating – 8-10 on a 10-point scale)*



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Perceptions of Impact of WBG-Supported Projects in South Africa

Q: *In what way, if any, did this WBG-supported project or initiative impact the people of South Africa?*

Energy Access and Load Shedding Reduction

"REIPPPP has added over 6 GW of clean power, cutting load-shedding and giving households and businesses more reliable electricity. It's created around 30,000 construction and operations jobs, many in rural areas, and lowered electricity costs for low-income users. Plus, it's reduced CO_2 emissions, improving air quality for communities."
(Bilateral / Multilateral Agency Respondent)

"World Bank loans and support helped avert a collapse of South Africa's power grid. The bank worked with the government, not only to stabilize the grid but to eliminate power cuts that had cut economic growth in the country." (Media Respondent)

Digital Development

"Development of South Africa's digital economy and national digital ecosystem" (Government Institution Respondent)

Infrastructure and Municipal Services

"… a $925 million results-based loan from the World Bank is funding upgrades to water, electricity, and waste services in eight metros (Johannesburg, Cape Town, eThekwini, etc.), aiming to make those essential services more reliable for millions of residents. Overall, the initiatives have added infrastructure, energy, and service-delivery improvements, though their direct impact on growth and unemployment has been modest." (Civil Society Respondent)

Health and Pandemic Preparedness

"The project focuses on using One Health approaches to better prepare for pandemics. Activities identified in the project will improve health systems and surveillance in South Africa and be linked to the South African Department of Health Pubic Health Plan. …"
(Academia Respondent)

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Key Themes from Open-Ended Responses on WBG's Operational Effectiveness

Q: *B4: In what way did this WBG-supported project or initiative impact the people of South Africa? | E1: What is the most important thing the WBG could do to increase its effectiveness in South Africa?*

Accelerating Operational Speed and Shifting to Outcomes-Based Delivery

- **Shift Focus to Measurable Outcomes:** Transition from measuring success by loan volume or the number of projects to tracking tangible, long-term development results, ensuring that funding is directly linked to verified, on-the-ground impact.
- **Accelerate and Simplify Operations:** Increase operational effectiveness by reducing bureaucracy, simplifying processes, and shortening project approval and delivery timelines to become a more agile and responsive partner.
- **Tailor Projects to Local Context:** Design focused, context-specific projects that address precise local needs rather than applying broad, overly complex national programs, which would enhance their overall impact and relevance.

Strengthen Local Engagement and Capacity

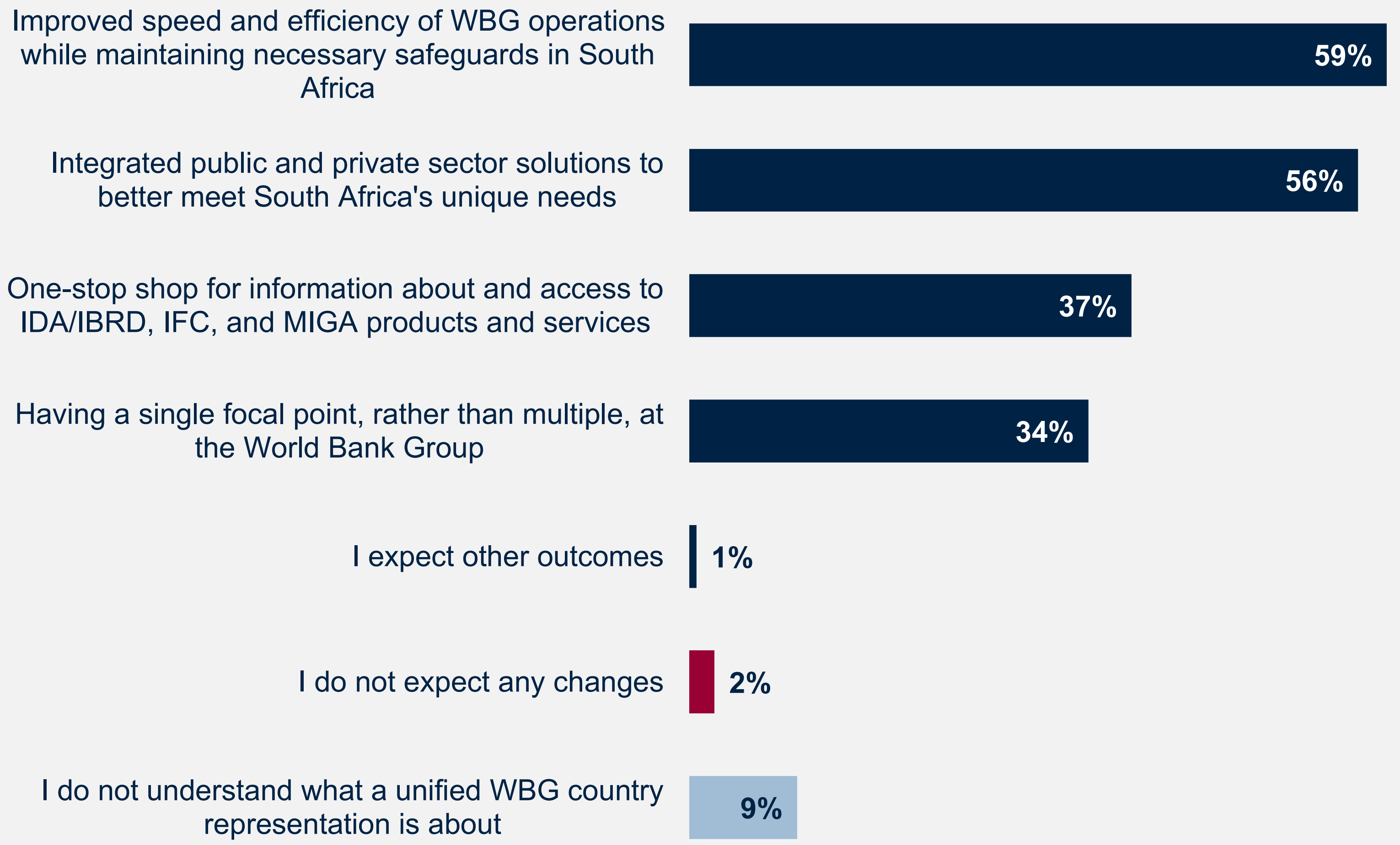
- **Deepen Local Partnerships and Ownership:** Move beyond simple consultation to build genuine partnerships with government, civil society, and the private sector, ensuring projects are co-designed to align with local priorities and foster a sense of ownership.
- **Build Local Implementation Capacity:** Provide targeted technical assistance and resources to strengthen the capacity of government and local institutions, addressing a key bottleneck that hinders the effective execution of projects and plans.
- **Leverage Local Expertise and Presence:** Make greater use of local experts and consultants to ensure solutions are context-appropriate and to facilitate skills transfer, while also increasing the field presence of WBG technical staff to provide direct, hands-on support.

Enhance Governance and Resource Management

- **Implement Robust Monitoring and Anti-Corruption Measures:** Establish stronger oversight mechanisms, such as results-based delivery units, to track the use of funds, ensure they reach their intended beneficiaries, and actively combat corruption.
- **Increase Transparency and Public Accountability:** Make WBG operations, project details, and performance metrics more visible and accessible to the public to build trust and allow for greater accountability from all stakeholders.
- **Optimize Resource Allocation and Internal Collaboration:** Concentrate financial and human resources on a few high-impact priorities to avoid spreading efforts too thinly and strengthen collaboration between WBG agencies to deliver more integrated and efficient solutions.

Top Expected Outcomes from Unified WBG Country Representation

Q: *What outcomes do you expect from unified leadership representing the World Bank (IBRD/IDA), IFC, and MIGA in South Africa? Select all that apply (%)*



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The WBG’s Instruments

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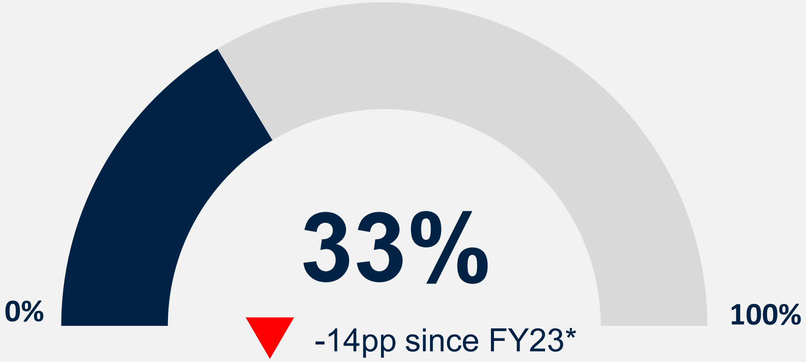
Financial Resources Considered the WBG's Greatest Value to South Africa

Q: *Which WBG instruments do you value the most in South Africa? Select up to 2 (%)*

Q: *How significant a contribution do you believe the WBG's knowledge work makes to development results in South Africa? 1=Not significant at all; 10=Very significant (% rating – 8-10 on a 10-point scale)*



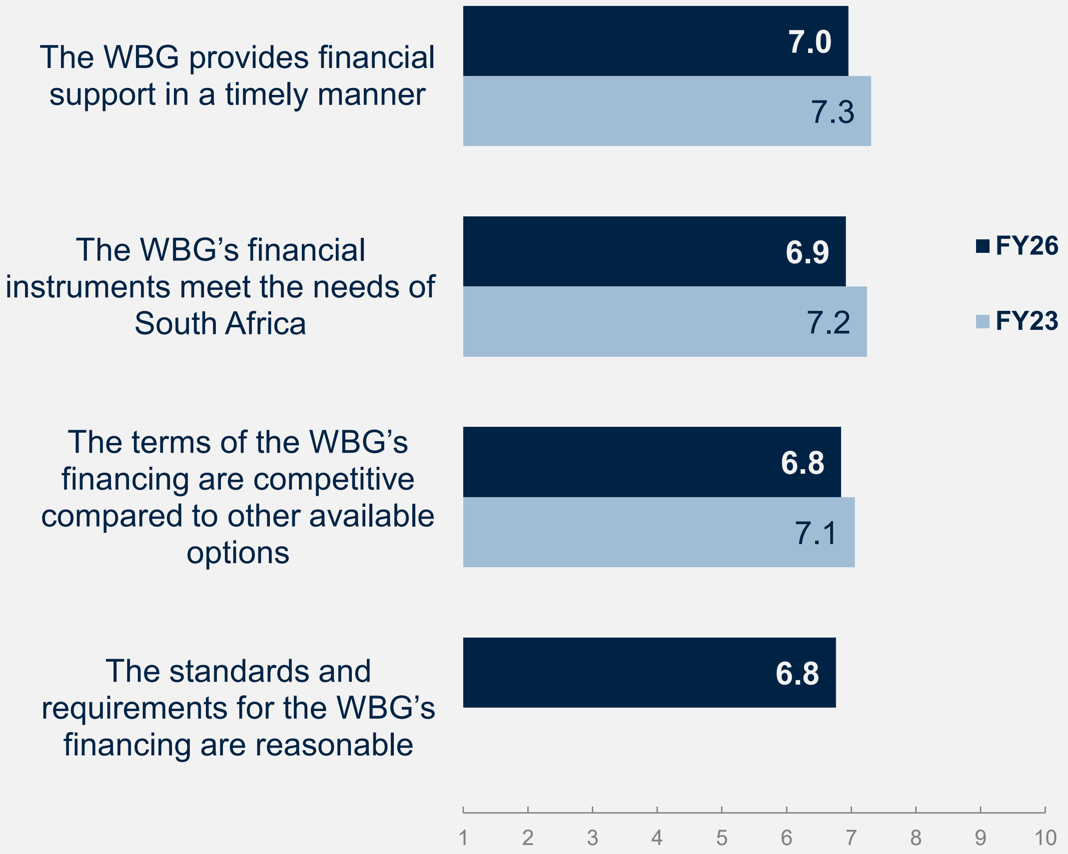
FY23

In FY23, 47% of stakeholders selected 8-10, answering this question

*Denotes significant differences between years

Perceptions of WBG Financing are Consistent With the Previous Survey; Perceptions on Timeliness of Support Remain Positive

Q: *To what extent do you agree with the following statements about the WBG's financial support to South Africa? 1=Strongly disagree; 10=Strongly agree (Only asked of respondents in government institutions or those who indicated that they collaborate with the WBG. Mean is reported)*



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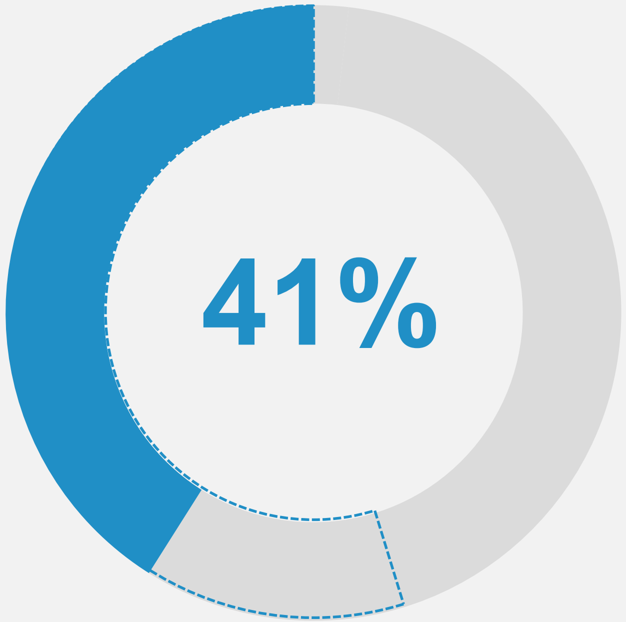
Most Respondents Used WBG Knowledge Work in the Past Three Years; Those Who Did Report Moderately High Quality

Q: *In the past 3 years, what WBG knowledge work have you used? Select all that apply (%)*

Q: *How would you rate the quality of the WBG's knowledge work (including data, research, training, policy notes, and advisory services) in South Africa? 1=Very low quality; 10=Very high quality (% rating – 8-10 on a 10-point scale)*



FY25

In FY25, in AFE region, on average **55%** of stakeholders selected 8-10, answering this question

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Comments on Financial Instruments and Knowledge: Summary of Comments

Q: *What is the most important thing the WBG could do to increase its effectiveness in these priority areas in South Africa?*

Improve Financial Instruments and Targeting

- **Offer Better Lending Terms:** Provide more favorable financial conditions, such as lower interest rates on loans, and offer direct support like debt counseling to reduce financial stress.
- **Prioritize Funding for Underserved Groups:** Direct funding and sponsorship toward small businesses, Black-owned enterprises, youth, and community-level projects to ensure more equitable growth.
- **Rebalance Sectoral Investments:** Shift educational funding from traditional universities to vocational (TVET) and historically disadvantaged institutions to better align skills with market needs.

Integrate Knowledge with Financial Operations

- **Link Funding Directly to Verified Results:** Tie financial disbursements to the achievement of measurable, on-the-ground outcomes rather than just project volume, creating stronger incentives for effective delivery.
- **Combine Financial Support with Technical Assistance:** Bundle financing with advisory services to strengthen government implementation capacity and help design more efficient and sustainable public systems.
- **Use Finance to Leverage Systemic Change:** Employ financial instruments to drive broader economic reforms and mobilize private sector capital, especially in critical infrastructure, to foster a more competitive economy.

Strengthen Local Capacity and Contextual Knowledge

- **Invest in Local Skills and Expertise:** Fund capacity building through technical and digital training and utilize local experts to design appropriate solutions and ensure sustainable skills transfer.
- **Tailor Advisory Services to Specific Needs:** Customize technical assistance to the unique context and capacity of different government entities, providing specialized expertise that is not locally available.
- **Deepen Understanding of the Local Context:** Improve analytical work by conducting more thorough research on the specific needs of South Africans, ensuring strategies are based on a deep understanding of the local environment.

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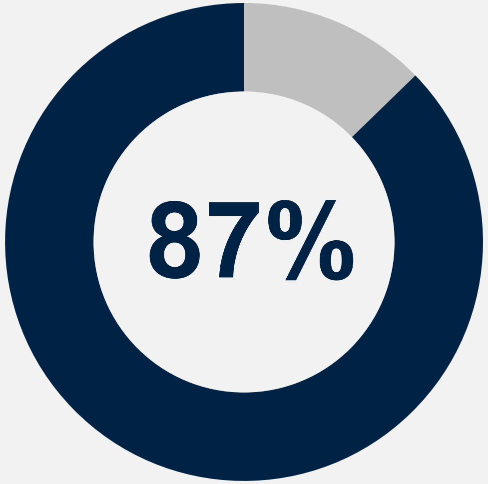
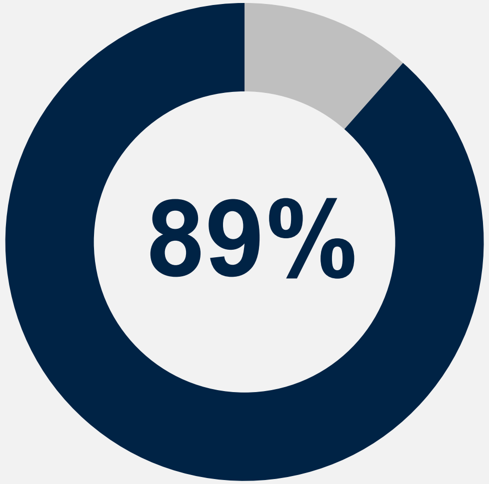
Influence of WBG Knowledge on Policy, Including Employment Policy

Influence on government policy *(% Yes)*



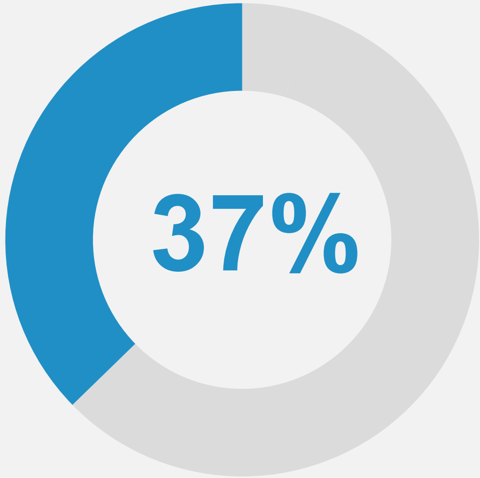
Q: *In your opinion, has the WBG influenced a new or existing government policy/action in South Africa?*

Influence on private sector *(% Yes)*



Q: *In your opinion, has the WBG influenced strategies or actions of private sector actors in South Africa?*

WBG support of policies on employment and job creation *(% selected 8-10)*



Q: *To what extent has the WBG influenced the government's policies or strategies on employment and job creation in South Africa? 1=Not influential at al; 10=Very influential (% rating – 8-10 on a 10-point scale)*

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Examples of Strategies, Policies and Reforms Supported by WBG

Q: *What policy, strategy, or action by the government and/or private sector did the WBG influence, and in what way?*

Renewable Energy and Finance

- *"The WBG has been a major architect in supporting the South African government's shift away from coal and toward renewable energy, directly influencing the Just Energy Transition Investment Plan (JET-IP) and the President's Energy Action Plan. These loans were conditioned on structural reforms to unbundle Eskom, opening the power sector to private competition. This helped drive the surge in privately funded renewable energy projects, leading to an increase in Eskom's Energy Availability Factor from 55% in 2023 to 63% in 2024."* (Academia Respondent)
- *"The WBG's backing of South Africa's REIPPPP pushed the government to adopt a competitive, transparent auction system for clean-energy projects. This led to a policy shift where a market-based procurement model replaced reliance on the state utility; new rules and standards for independent power producers were created; billions of rand flowed in, sparking a vibrant renewable industry; and solar and wind capacity grew fast, cutting coal dependence and supporting climate targets."* (Respondent from Bilateral or Multilateral Agency
- *"Influenced the development of a sustainable finance programme of work for the Financial Sector Conduct Authority. Overall influenced the national government sustainable finance programme of work — e.g. in relation to transition planning, carbon credits."* (Government Institution Respondent)

Multisector

- *"The WBG helped shape South Africa's National Development Plan (NDP) implementation by feeding its 'SKIP' principles into the government's growth-and-jobs agenda, effectively turning the NDP's high-level goals into concrete, evidence-based programmes that Treasury can roll out. The WBG's US$1.5 billion Development Policy Loan locked in three reform pillars — energy security, freight-transport efficiency, and a low-carbon transition — forcing Treasury to embed these policy actions into its fiscal and infrastructure plans with clear timelines and results-based monitoring."* (Civil Society Respondent)
- *"The World Bank's support has helped the government deal with the impact of the COVID-19 pandemic and the energy crisis, which has been vital in enabling the economic recovery and policy stability we are now seeing. The presence of the Bank and its arms, like the IFC, has helped provide confidence to the private sector, which has worked with the government in a number of initiatives to turn the economy around."* (Media Respondent)

The WBG's Engagement and Collaboration

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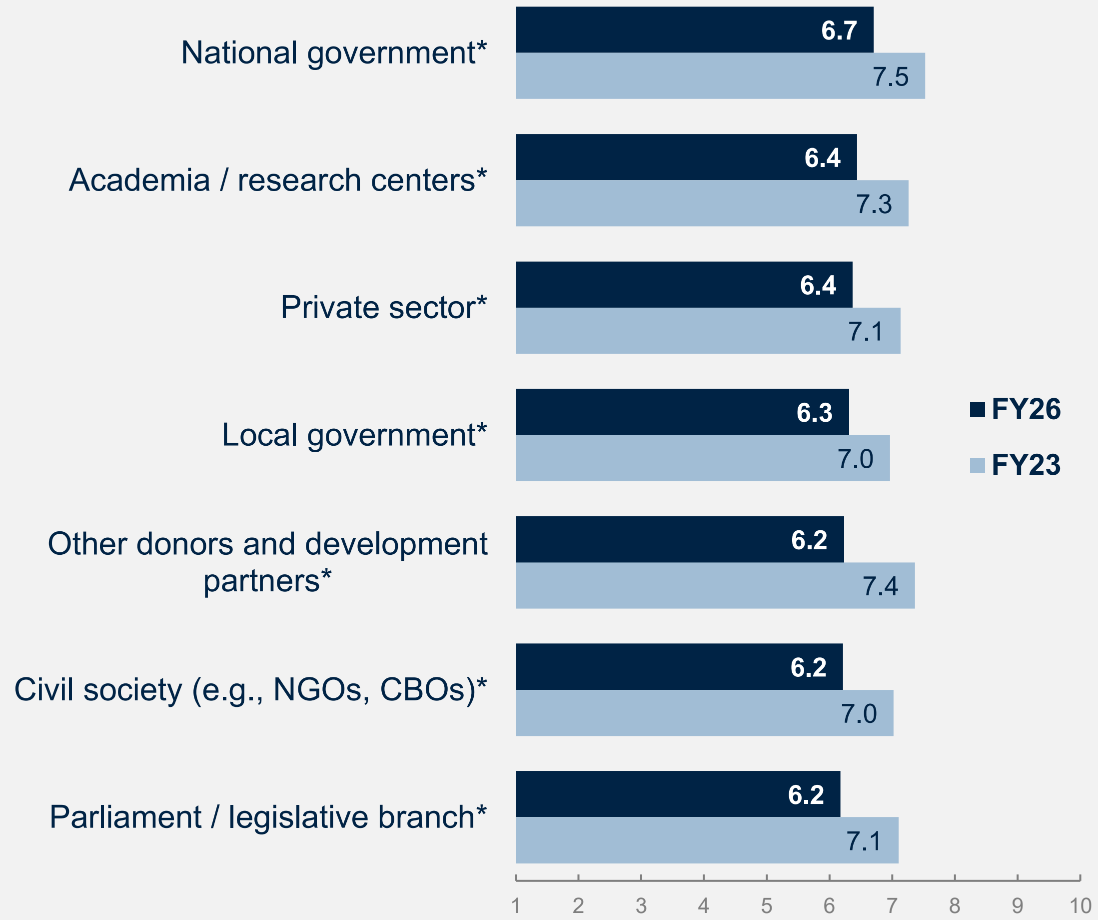
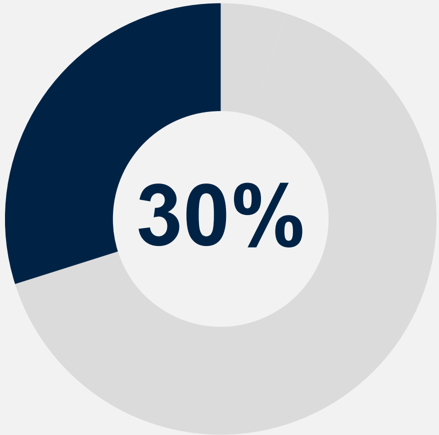
Perceptions of WBG Collaboration Have Declined Across All Groups

Q: *How effective is the WBG at **collaborating** with the following groups in South Africa? 1=Not effective at all; 10=Very effective (Mean is reported)*

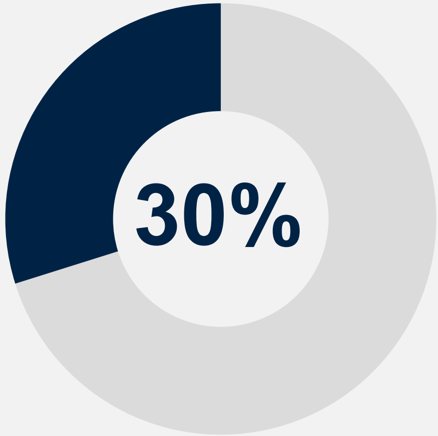


* Denotes significant differences between years

Q: *How effective is the WBG at **partnering with the government** to improve the business environment in South Africa? 1=Not effective at all; 10=Very effective (% rating – 8-10 on a 10-point scale)*



Q: *How effective is the WBG at **partnering with the private sector** in South Africa to support business development and investment? 1=Not effective at all; 10=Very effective (% rating – 8-10 on a 10-point scale)*



Stakeholders Prioritize Private Sector Collaboration and Call for More Genuine, Locally Driven Partnerships

Improved collaboration emerged as one of the key themes when respondents discussed the ways the WBG could enhance its effectiveness:

Expand Private Sector Collaboration and Mobilize Private Capital

- Respondents see deeper private sector engagement as central to job creation — not a secondary objective — with energy and infrastructure as priority sectors.
- Many call for formal mechanisms to mobilize private investment alongside WBG financing, rather than relying on ad hoc approaches.

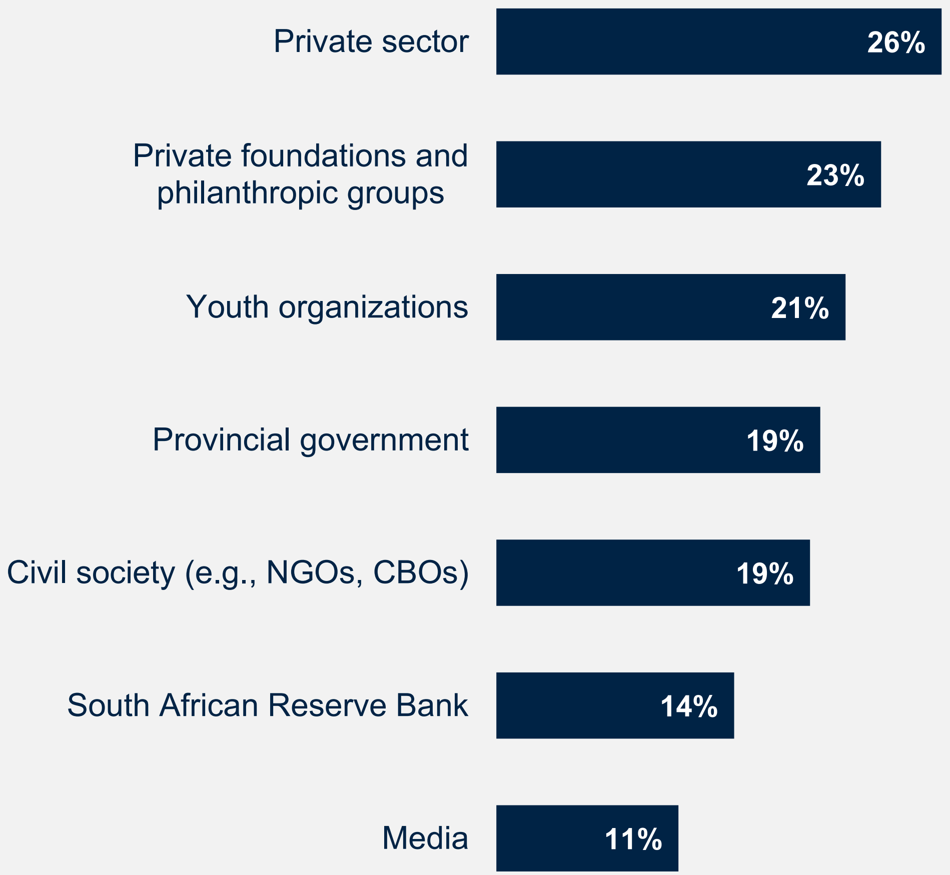
Deepen Engagement With Sub-National and Community Partners

- Respondents distinguish the WBG's strong partnership with national government from its more limited engagement with provincial, local, and community actors.
- Local and sub-national governments are viewed as critical for implementation but have limited access to WBG technical assistance, especially outside loan agreements.
- Civil society and community groups are seen as underutilized partners for ensuring relevance, local ownership, and sustainability.

Move From Consultation to Genuine Co-Design

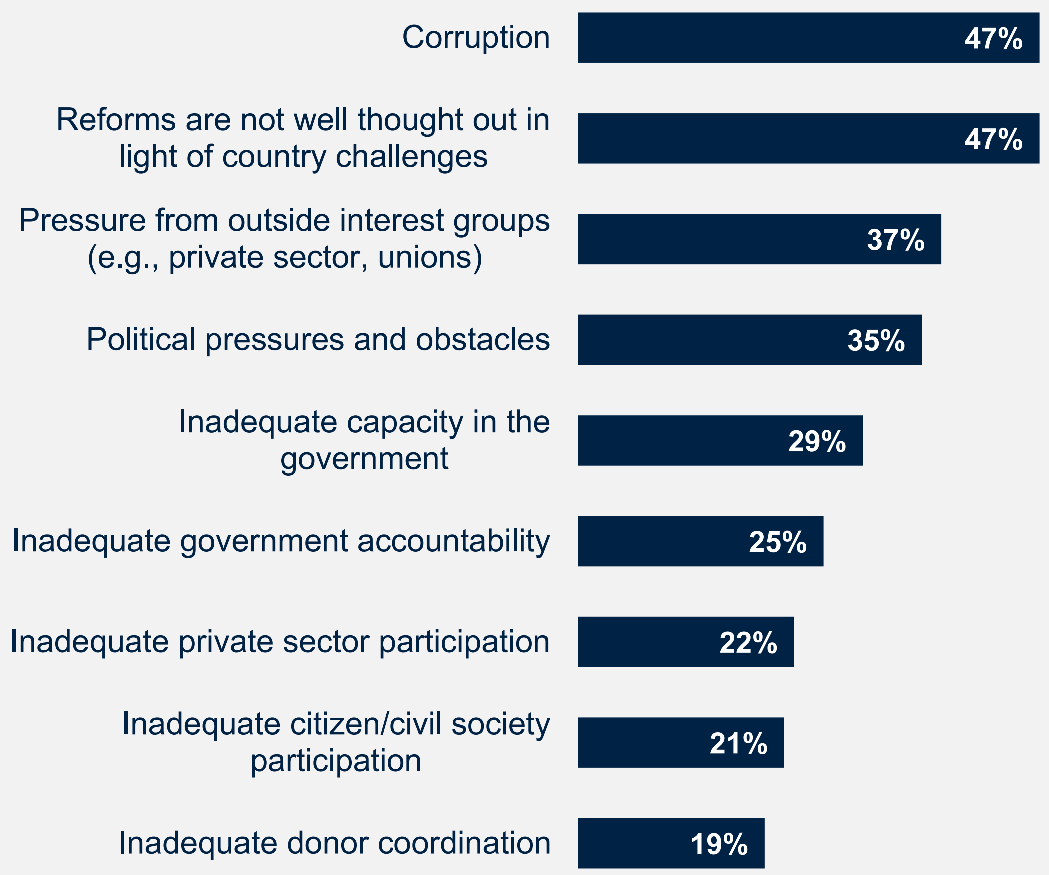
- Respondents contrast "tick-box consultations" with outcome-based partnerships that set clear, measurable, co-owned targets.
- Proposals to embed accountability structures within SA institutions — such as a Results-Based Delivery Unit in National Treasury — reflect demand for shared ownership.
- Stronger coordination across WBG agencies is also seen as essential for delivering integrated, client-responsive solutions.

Q: *In addition to its partnership with the national government, which of the following should the WBG* ***collaborate with more*** *to have a greater impact in South Africa? Select up to 2 (%)*

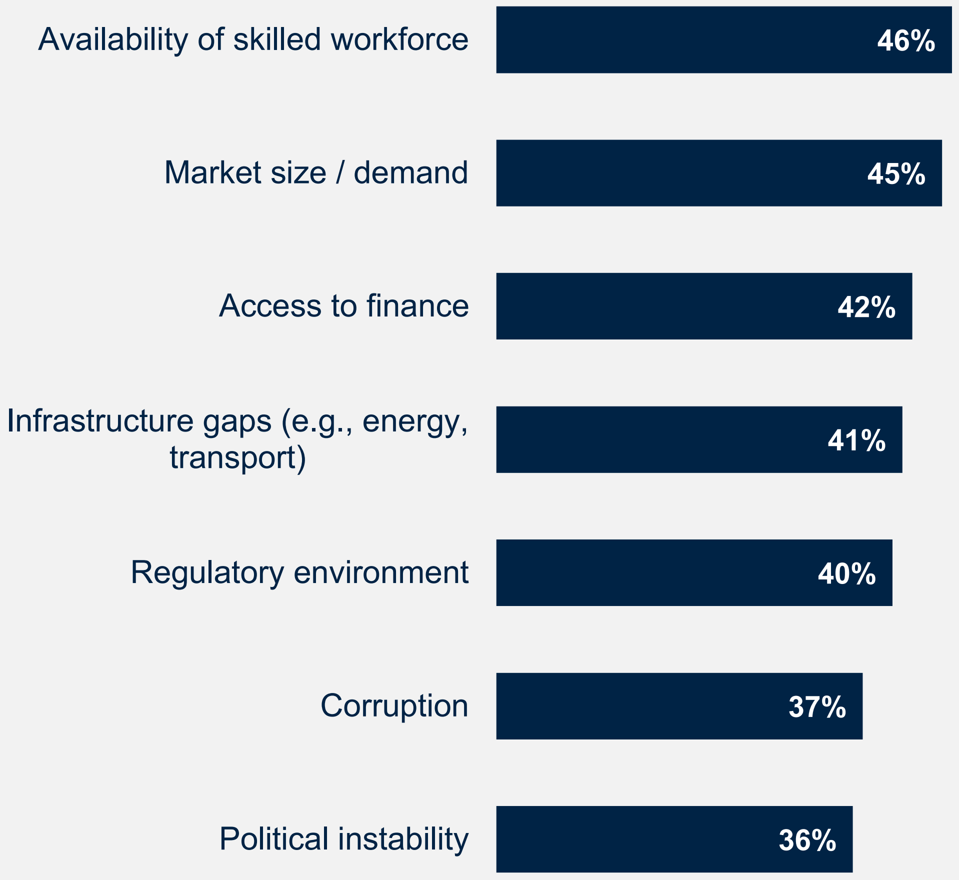


Stakeholders Believe Corruption and Poor Reform Design Slow Reform Efforts, While Skills Gaps and Market Size are Key Barriers to Private Sector Development in South Africa

Q: *When economic and/or social reform efforts fail or are slow to take place in South Africa, which of the following would you attribute this to? Select up to 3 (%)*



Q: *What are the biggest challenges facing private sector development in South Africa? Select up to 3 (%)*



Communication and Outreach

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WBG Events, Direct Contact, and Social Media are the Most Preferred Channels to Obtain Information From the Bank

Top Two Preferred WBG Channels

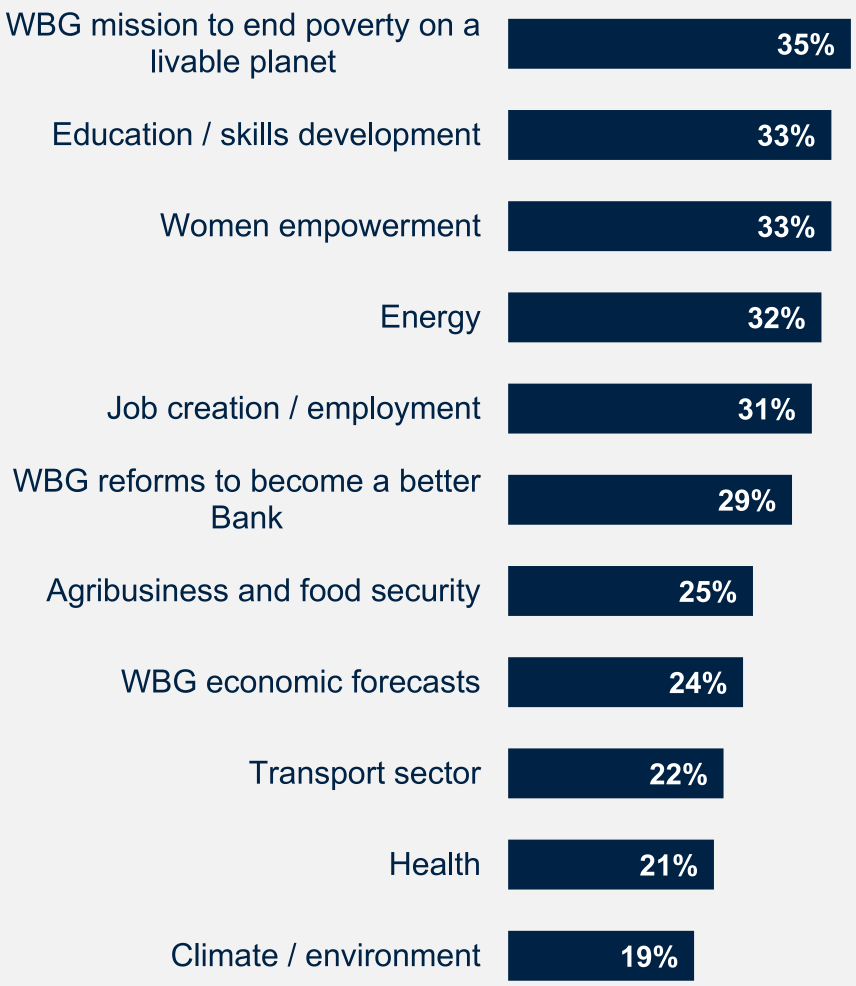
	All Respondents	Office of a Parliamentarian	Government Institutions	Provincial Government	Local Government	Bilateral / Multilateral Agency	Civil Society	Private Sector	Academia	Media
WBG event / conference / workshop (in person or online)	**63%**	**68%**	**60%**	**60%**	**75%**	**56%**	**57%**	**69%**	**63%**	**67%**
Direct contact with WBG staff (e.g., in person, virtually, phone, email)	**56%**	**56%**	**51%**	**73%**	**75%**	**50%**	**49%**	**65%**	44%	**67%**
WBG social media channels (e.g., Facebook, LinkedIn, Instagram, Twitter/X)	41%	44%	44%	33%	38%	35%	42%	36%	**59%**	33%
WBG publications	27%	24%	36%	13%	31%	15%	23%	31%	30%	26%
WBG podcasts	25%	28%	34%	20%	19%	24%	25%	22%	15%	22%
WBG websites (including blogs)	23%	32%	18%	13%	13%	32%	25%	16%	33%	26%
WBG e-Newsletters	19%	16%	18%	20%	6%	29%	21%	16%	22%	15%
WBG direct messaging (e.g., WhatsApp)	14%	12%	14%	20%	6%	12%	13%	18%	11%	11%

How would you prefer to obtain information from the WBG? (Select up to 3)

60% of Respondents Recalled Seeing or Hearing About the WBG Recently, Most Often at WBG Events

Q: *Where do you recall seeing or hearing this information? Select all that apply (%)*

Q: *What do you recall seeing or hearing about the WBG? Select all that apply (%)*



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Stakeholders Wanted Information About WBG Research & Knowledge, Regular Updates on Activities, and Information on How to Partner

Top Two Types of Preferred Information About the WBG

	All Respondents	Office of a Parliamentarian	Government Institutions	Provincial Government	Local Government	Bilateral / Multilateral Agency	Civil Society	Private Sector	Academia	Media
WBG research and knowledge	47%	44%	**45%**	33%	**44%**	**53%**	**47%**	**50%**	**52%**	48%
Regular updates on WBG activities	45%	**52%**	43%	**60%**	25%	**44%**	42%	**43%**	**52%**	**56%**
Information on how to work / partner with WBG	44%	**48%**	**47%**	**60%**	38%	35%	**51%**	38%	26%	**59%**
Outcomes / results of WBG-supported projects or initiatives	38%	**52%**	34%	47%	**44%**	41%	34%	32%	44%	33%
Overview of WBG financial products and services	37%	32%	44%	33%	**44%**	38%	34%	34%	33%	33%
WBG sector-specific strategies	34%	36%	40%	20%	38%	29%	32%	32%	41%	30%
Impact assessments and evaluations of WBG-supported projects	32%	32%	30%	20%	**44%**	35%	34%	36%	22%	37%

Q What information would be most helpful to you in understanding the WBG's role in South Africa? (Select up to 3)

Sample Demographics and Detailed Methodology

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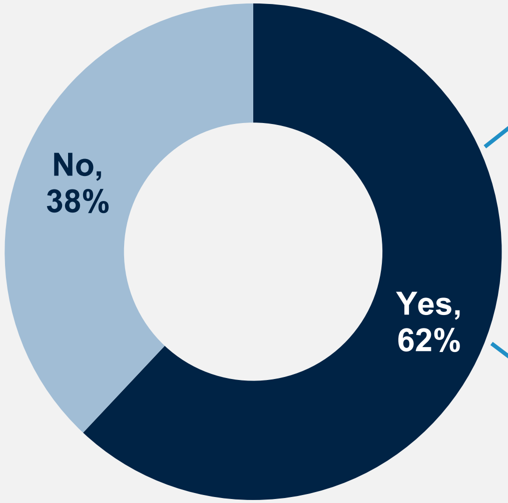
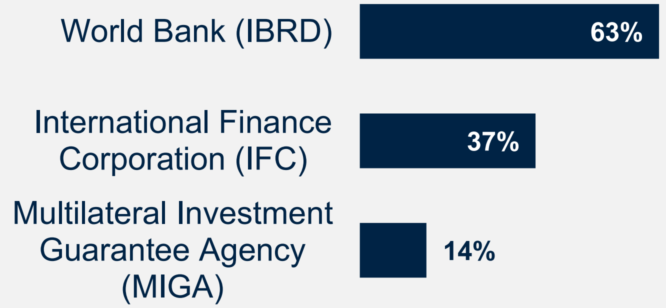
Sample Demographics

Q: *In the past 3 years, have you worked or collaborated with the WBG in South Africa? (N=333)*

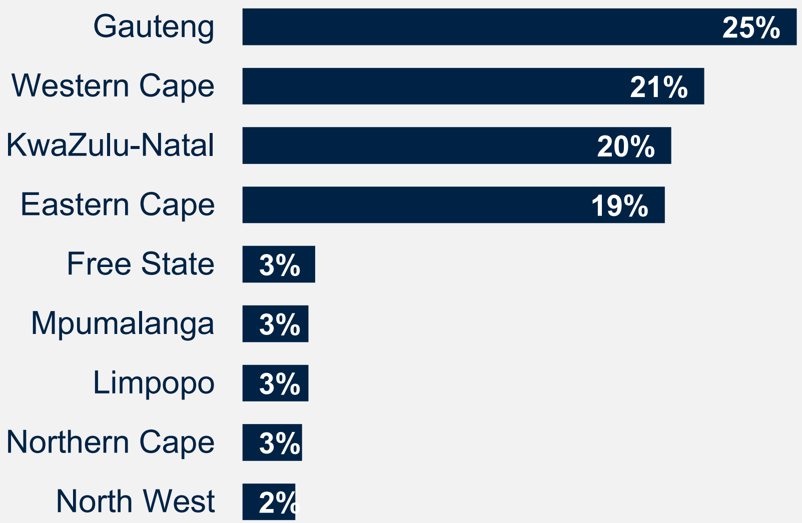
Respondents from government institutions (90%) and parliamentarians (84%) were most likely to collaborate with the WBG, while those from provincial government (47%), civil society (47%), and private sector (47%) were less likely to do so.



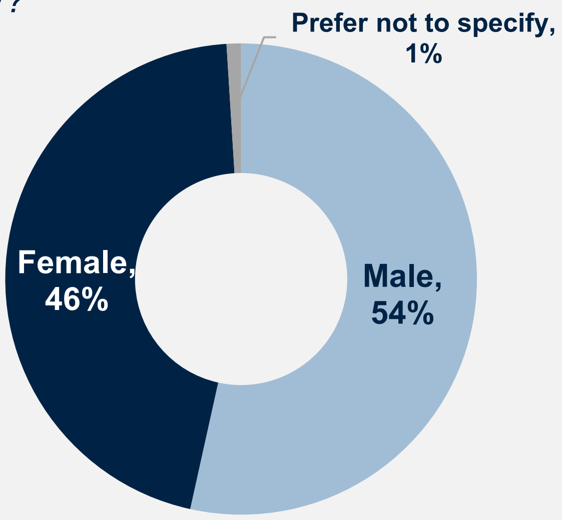
Q: *Which of the following WBG agencies have you worked or collaborated with in South Africa? (N=208)*



Q: *Which best represents your geographic location? (N=331)*



Q: *What is your gender? (N=329)*



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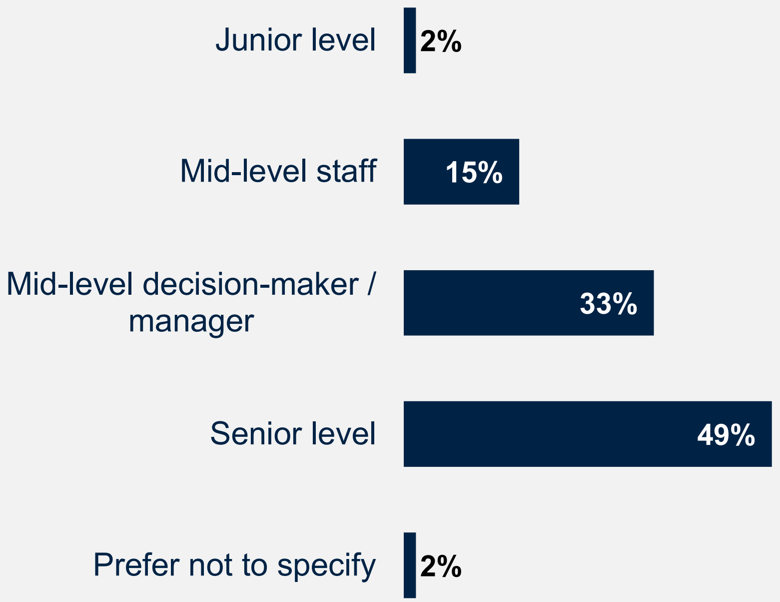
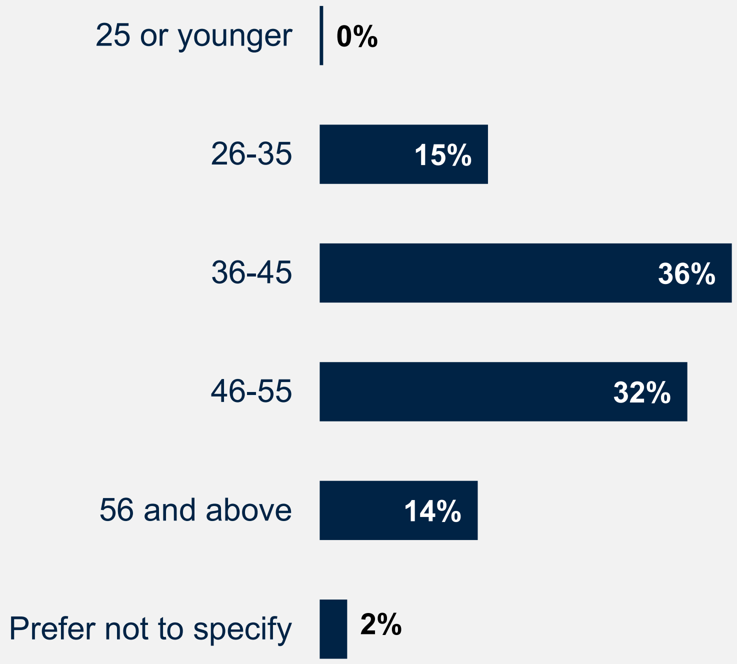
Sample Demographics (continued)

Q: *Within your organization, would you describe yourself as… (N=315)*



Q: *What's your age? (N= 331)*



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Detailed Methodology

From **January to March 2026**, a total of **837** stakeholders in South Africa 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, bilateral or multilateral agencies, civil society organizations, the private sector, academia and research centers, and the media.

Of these stakeholders, **333 participated in the survey (40% response rate)**. Respondents received the questionnaire by courier or completed it online.

This year's survey results were compared to the FY23 Country Opinion Survey, which had a response rate of 24% (N=310).

Comparing responses across Country 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.

Percentage of Respondents	FY 2023	FY 2026
Government Principals: Office of the President, Deputy President, Minister	>1%	>1%
Office of a Parliamentarian (National Assembly, Legislative Body)	>1%	8%
Government Institutions: Employee of a Ministry, Department, Project Implementation Unit, Independent Government Institution, Judiciary, State-Owned Enterprise	17%	23%
Provincial Government	5%	5%
Local Government	9%	5%
Bilateral/Multilateral Agency: Embassy, Development Organization, Development Bank, UN Agency	12%	10%
Civil Society Organization: Local and regional NGOs, Community-Based Organization, Private Foundation, Professional/Trade Association, Faith-Based Group, Youth Group	8%	16%
Private Sector: Private Company, Financial Sector Organization, Private Bank, Small, Micro & Medium Enterprise	27%	17%
Academia/Research Institute/Think Tank	7%	8%
Media	13%	8%
Total Number of Respondents	**310**	**333**

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

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Detailed Methodology (continued)

Breakdowns for individual questions by stakeholder group and by year can be found in the "South Africa COS FY26 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 FY26. 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 FY23 means shown in this report are based only on the subset of respondents who received the same questions in FY26, rather than the full FY23 sample. As a result, these means may differ from those published in the original FY23 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 Mai, the World Bank Group's AI-powered secure tool, and reviewed by the Bank staff for accuracy.

Thank you

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

countrysurveys@worldbankgroup.org

Country Opinion Surveys

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