

January 2023



Country Opinion Surveys

# FY 2022 **Angola** Country Opinion Survey Report

ECR Business Intelligence Team



WORLD BANK GROUP

# Acknowledgements

The Angola 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). Yulia Danilina, Jessica Cameron, Nan Lin, and Sofya Gubaydullina oversaw design, reporting, and analysis. Dania Mendoza, Noreen Wambui, and Irina Popova provided data support.

BI acknowledges the significant contribution from the Angola country team. In particular, BI is grateful for the support from Ana Maria Carvalho (Senior Operations Officer) and Wilson Peril Mbanino Piassa (External Affairs Officer) who coordinated the survey related activities from Luanda, Angola.



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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 Angola perceive the WBG. The survey explored the following questions:

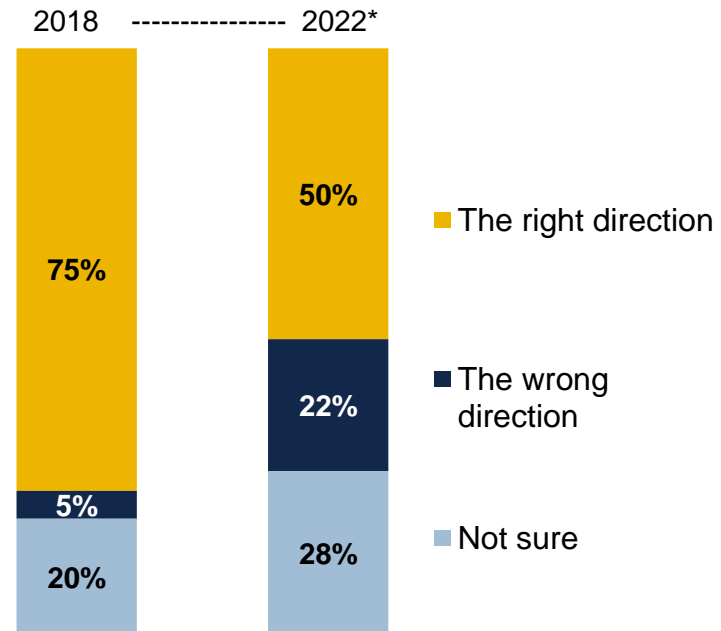
1. What opinion do key stakeholders have of the WBG when it comes to its effectiveness, relevance, alignment with Angola's development priorities, and other key indicators? Are opinions improving or declining?
2. What areas of development are perceived to be the most important? Have the priorities changed over the past three years?
3. How the WBG is perceived as a development partner? Are opinions improving or declining?
4. What do key stakeholder value the most and the least when it comes to the WBGs work at the country level? What are the priorities looking forward?
5. What opinion do key stakeholders have of the WBG knowledge products and their quality? Are opinions improving or declining?
6. What are the preferred communication channels and which channels are reported to be used the most? Are there differences among stakeholder groups in terms of preferred channels?

# Overall Context

# Country Direction and Economic Opportunity

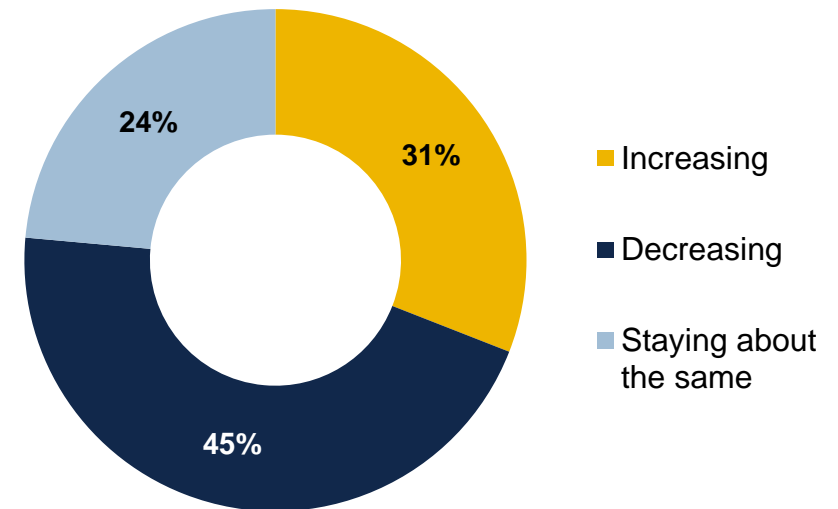
In FY22, stakeholders are more pessimistic about Angola being headed in the right direction compared to FY18. Almost half of respondents (45%) feeling that economic opportunities in the country are decreasing.

## Country Direction



\*significantly different between years

## Perceptions of Economic Opportunity



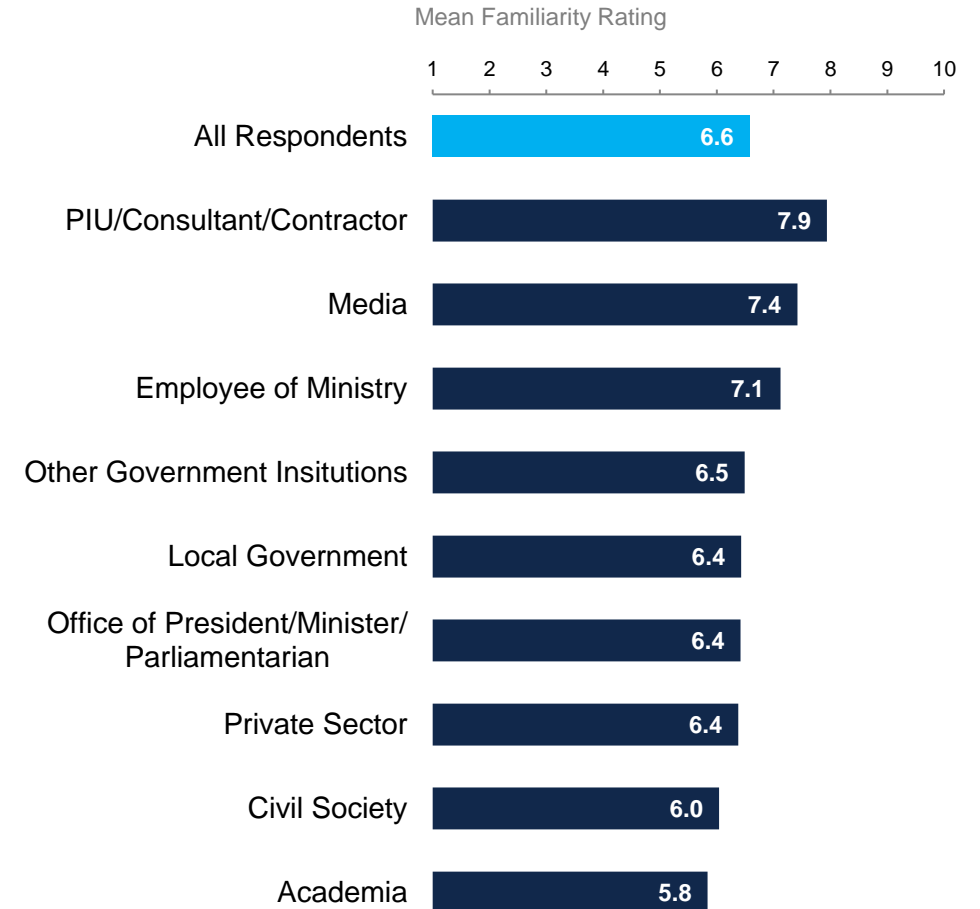
# Familiarity with the World Bank Group

**Year comparison:** Respondents in this year's COS had significantly higher levels of familiarity with the World Bank compared to FY18:

Mean familiarity: FY22 = **6.6**;  
FY18 = **4.1**.

**Collaboration:** Respondents who collaborate with the WBG also reported significantly higher levels of familiarity with the work of the World Bank compared to respondents who do not collaborate:

Mean familiarity: WB collaborators = **7.6**;  
Non-collaborators = **6.2**.



# Development Priorities

Although **education** remains top of mind for respondents, being the top development priority this year as in FY18, far fewer respondents selected it this year.

- It should be noted that respondents who identified their primary specialization of work as “education” (21% of the sample) were significantly more likely to indicate that “education” was a top development priority (69%) compared to respondents from other sectors (46%).

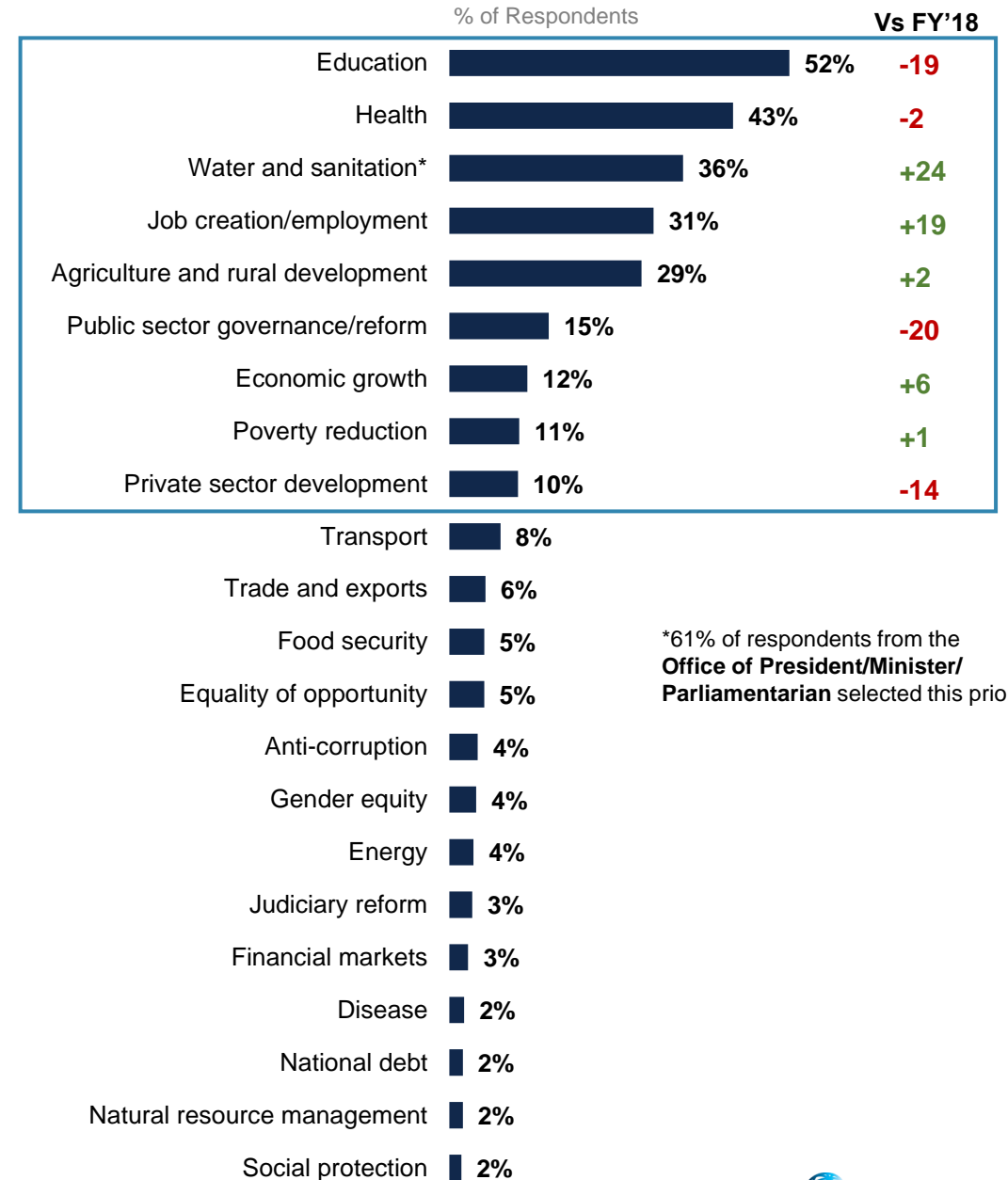
**Water and sanitation** and **job creation/employment** grew in prominence in FY22, with more than twice as many respondents selecting them among the top development priorities this year compared to FY18.

**Public sector governance/reform**, the #3 priority in FY18, waned significantly in priority this year.

*It should be noted that there was a change in the methodology for this question: In FY18, respondents could select up to three priorities, while in FY22 they could select up to five.*



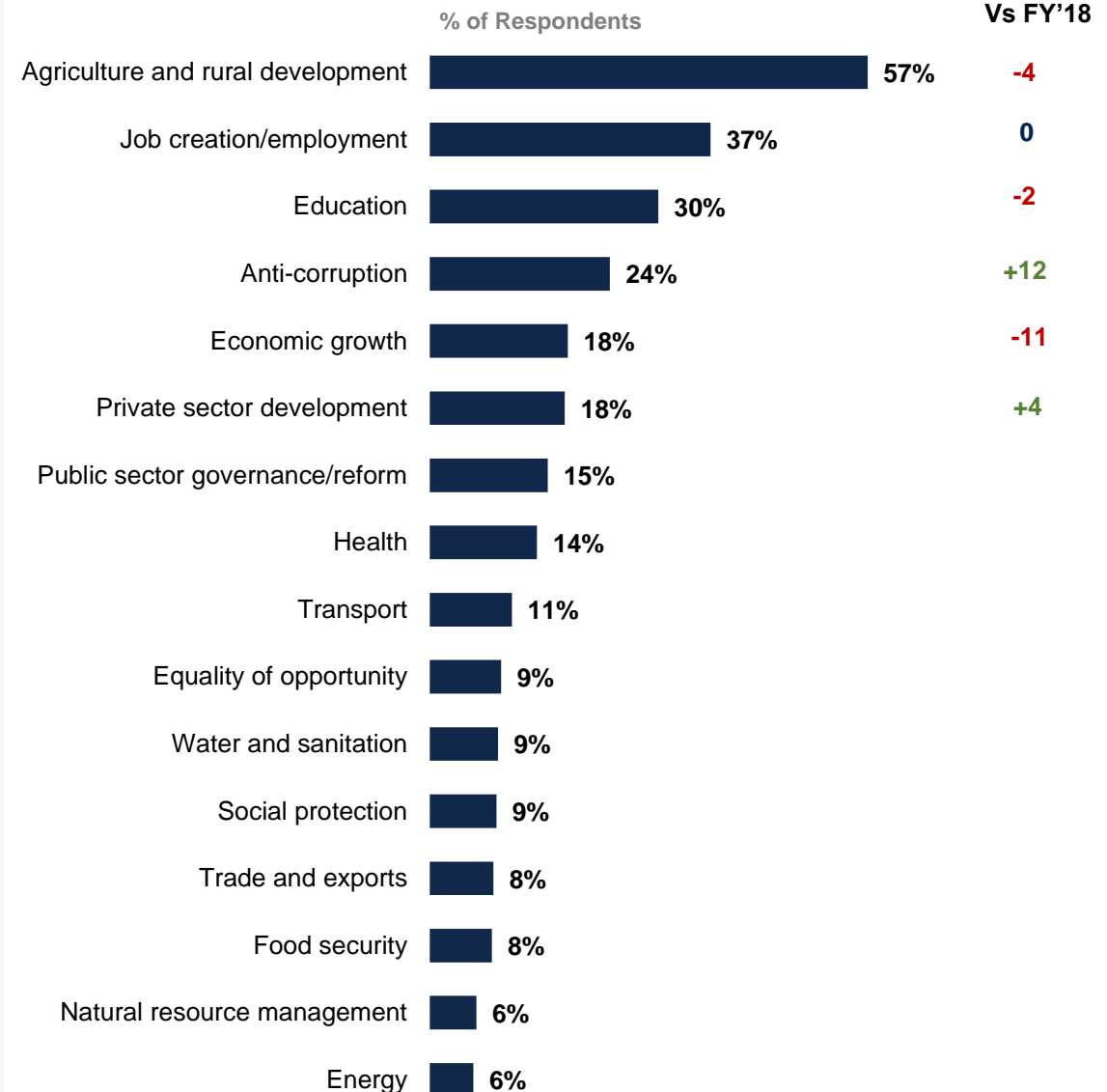
Please identify which of the following development priorities you consider the most important in Angola. (Choose no more than 5) (N=489)



# Contributing Most to Poverty Reduction

As in FY18, respondents selected **agriculture and rural development**, **job creation**, and **education** as the top three contributors to poverty reduction in Angola.

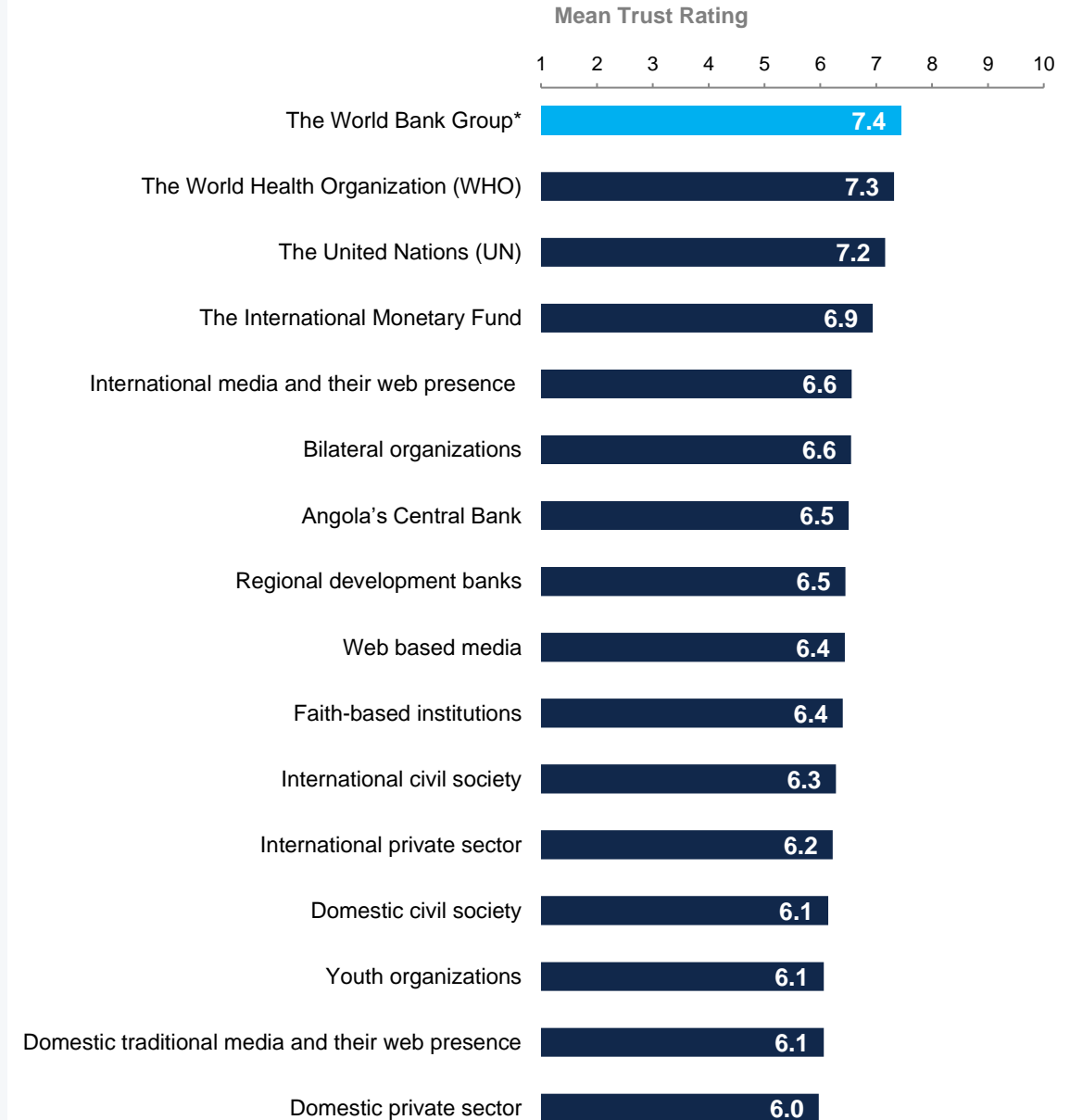
Of note, **anti-corruption** was the #4 contributor with twice as many respondents selecting it this year as in FY18.



Poverty reduction is a broad term that encompasses work in many different areas. Which THREE areas of development listed below do you believe would contribute most to reducing poverty in Angola? (Choose no more than 3) (FY18 N = 432; FY22 N=494)

# Trust in Institutions

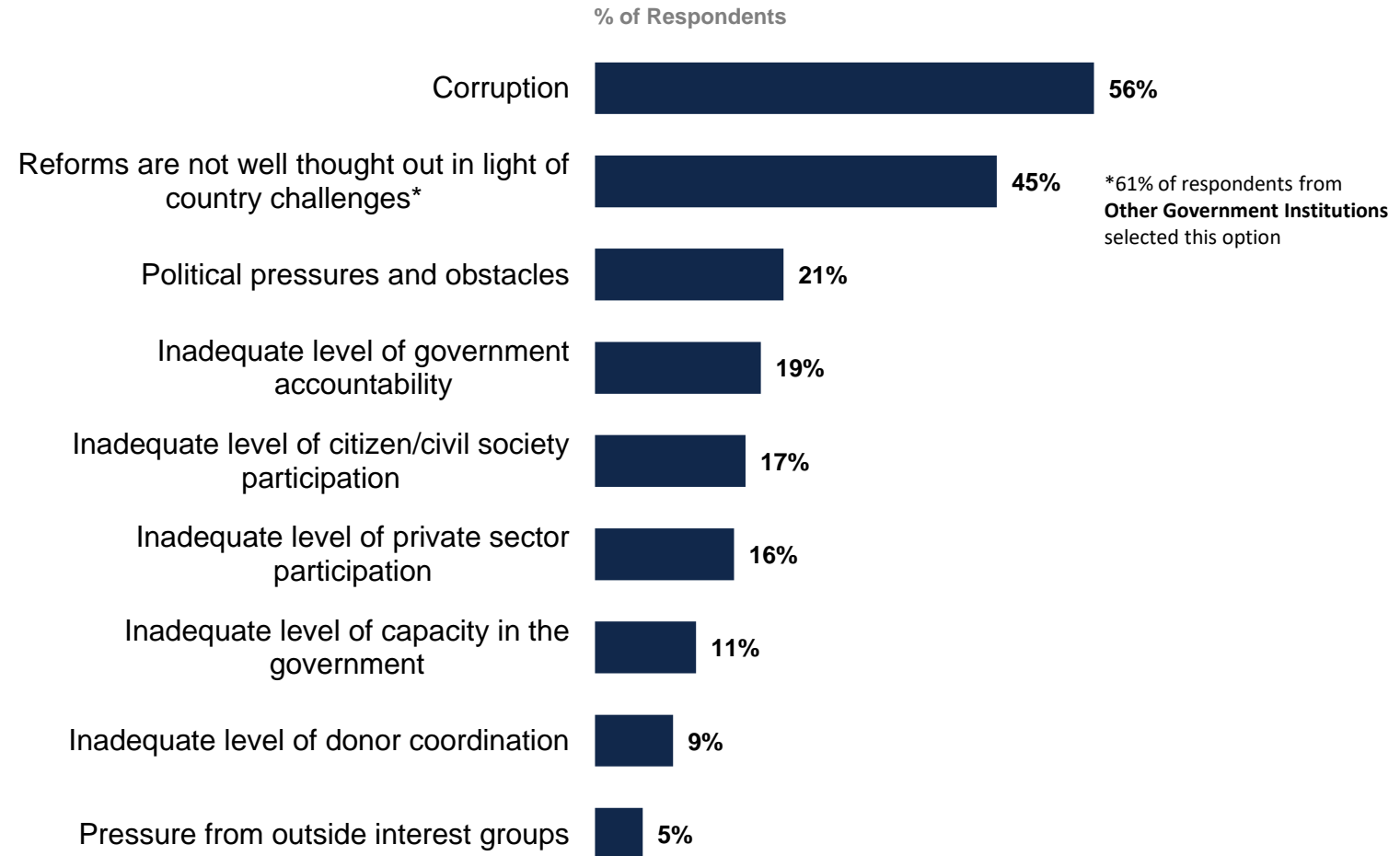
WBG, along with WHO, are the most trusted international organizations in Angola among those studied. It should be noted that even top-trusted institutions get only moderate ratings of trust from the respondents, the highest mean being 7.4 on a 10-point scale.



To what extent do you trust each of the following groups to do what is right?  
Scale: 1-10 (1: To no degree at all – 10: To a very significant degree)

# Attribution of Failure

**Corruption (56%)** and **reforms not being well thought out in light of country challenges (45%)** were the main reasons for slow/failed reforms in Angola according to respondents.

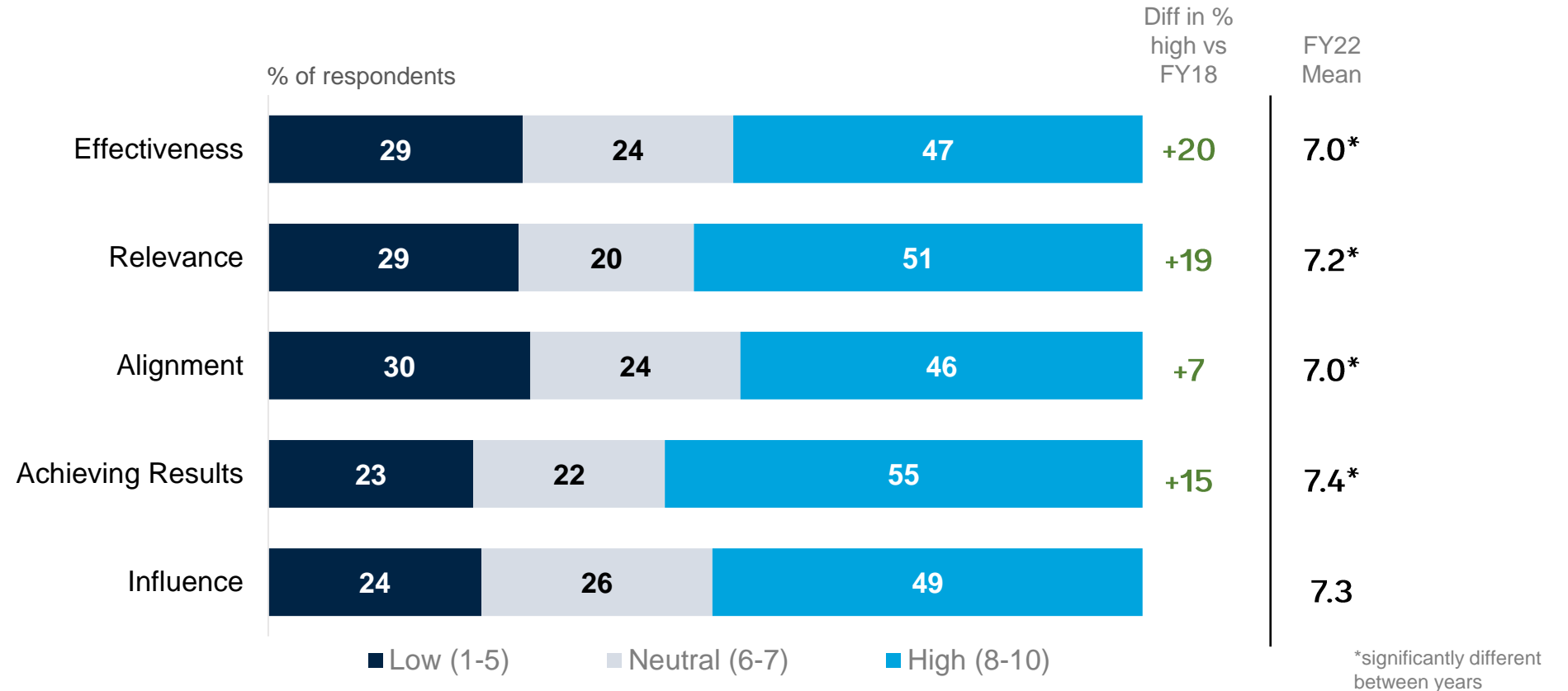


When economic and/or social reform efforts fail or are slow to take place in Angola, which of the following would you attribute this to? (Choose no more than 2) (N=465)

# Overall Attitudes toward the World Bank Group

# Key Performance Indicators

In FY22, responses to the key indicator questions were notably higher than the FY18 COS.



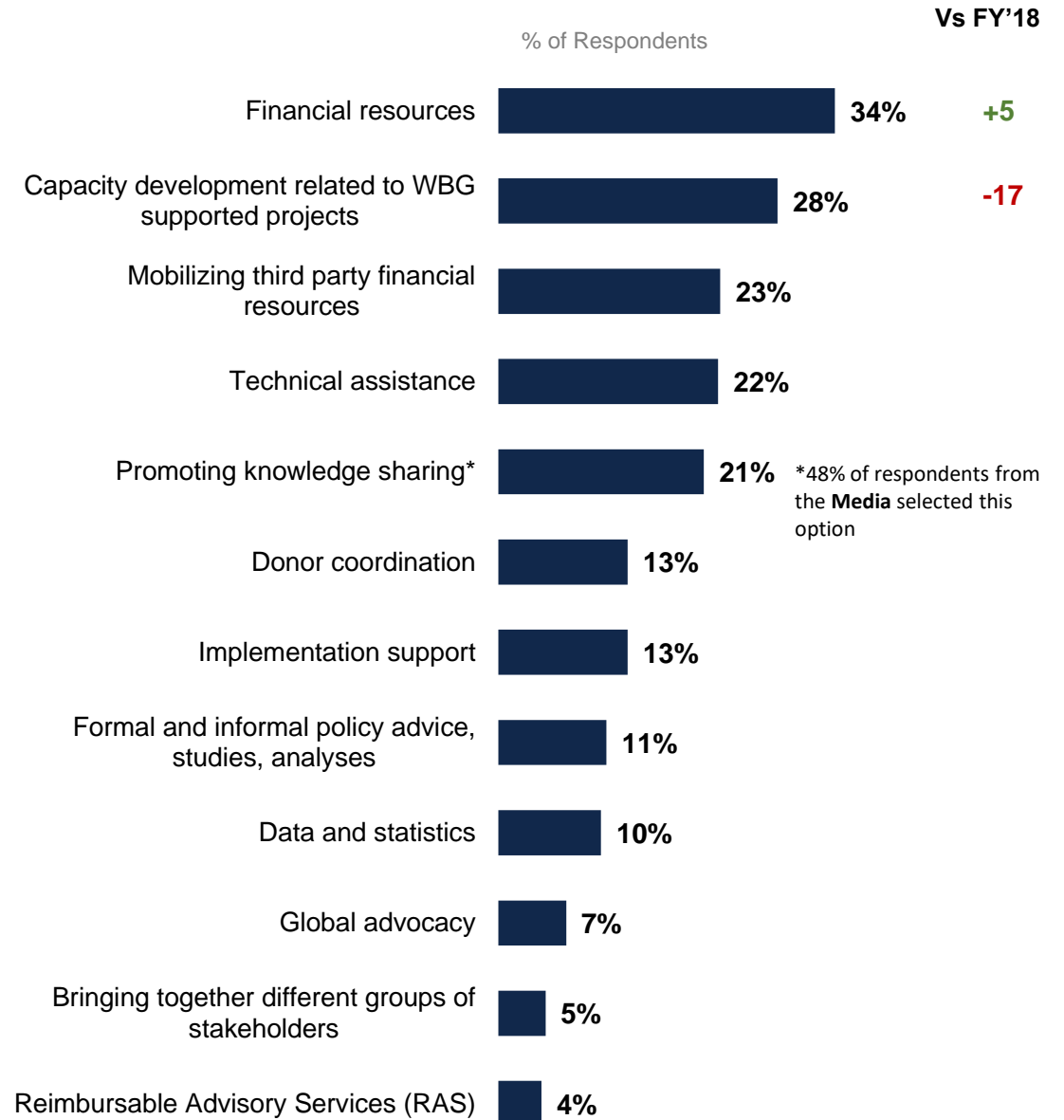
Overall, please rate your impression of the effectiveness of these organizations in Angola. The World Bank (IBRD), Scale: 1-10 (1: Not effective at all – 10: Very effective)  
 Overall, the World Bank Group currently plays a relevant role in development in Angola, Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)  
 The World Bank Group's work is aligned with what I consider the development priorities for Angola, Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)  
 To what extent does the World Bank Group's work help to achieve development results in Angola? Scale: 1-10 (1: To no degree at all– 10: To a very significant degree)  
 To what extent does the World Bank Group influence the development agenda in Angola? Scale: 1-10 (1: To no degree at all– 10: To a very significant degree)

# Greatest Value

**Financial resources** and **capacity development related to WBG supported projects** were the most highly valued activities of the WBG in Angola, according to respondents.

The importance of financial resources has increased by 5 percentage points (pp) compared to FY18; at the same time, capacity development, while still very valuable, was not as prominent this year (dropping 17 percentage points).

Notably, **formal and informal policy advice**, the #3 greatest value in FY18, was of significantly less value to respondents this year, decreasing from 29% in FY18 to 11% FY22.



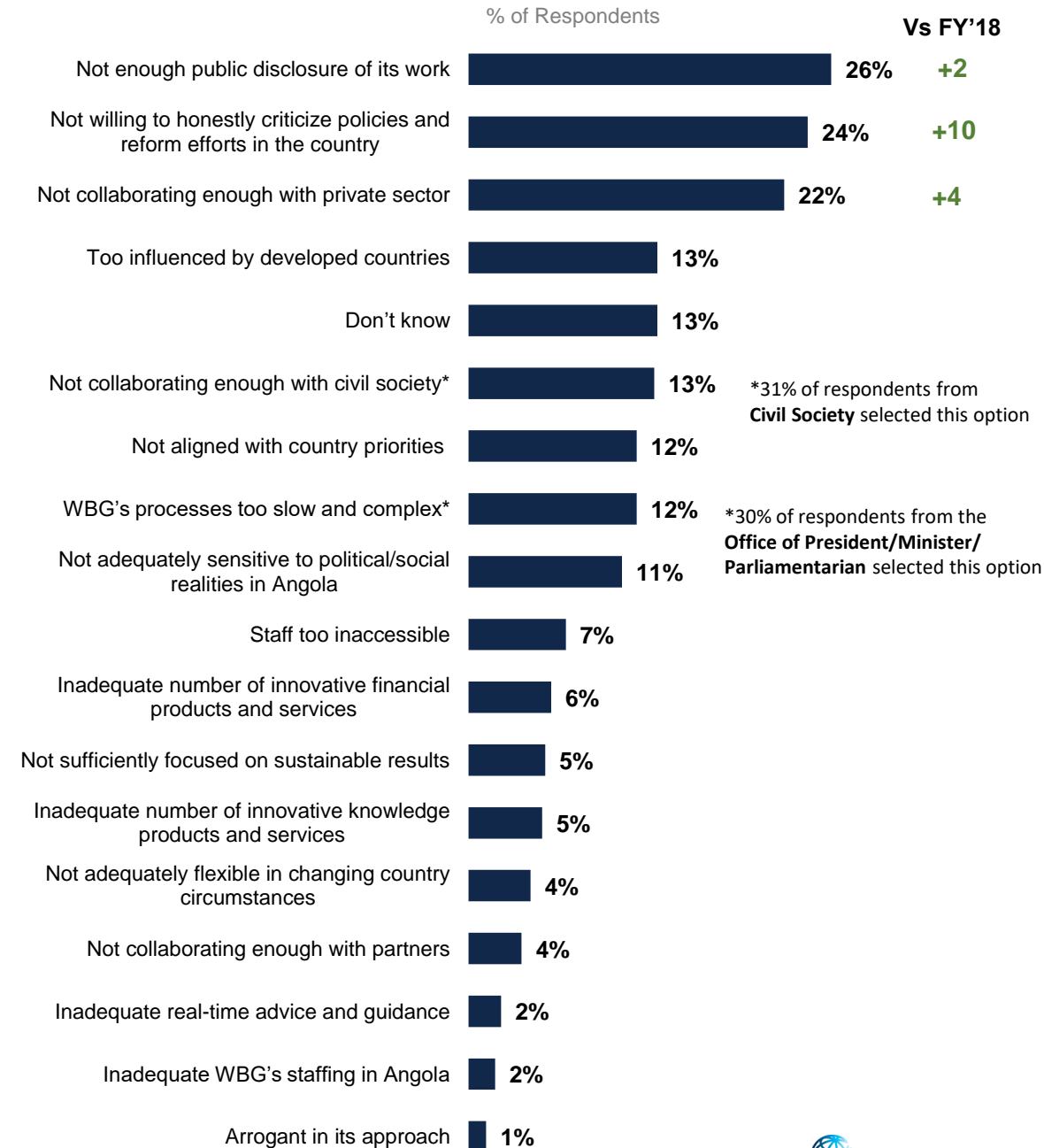
When thinking about the World Bank Group's role in Angola, which activity do you **VALUE** the most? (Choose no more than 2) (FY18 N = 371; FY22 N=478)

# Greatest Weakness

Respondents in FY22 see the WBG's greatest weaknesses as **not enough public disclosure of its work, not willing to honestly criticize policies and reforms efforts in the country** (up 10 percentage points from FY18), and **not collaborating enough with private sector**.

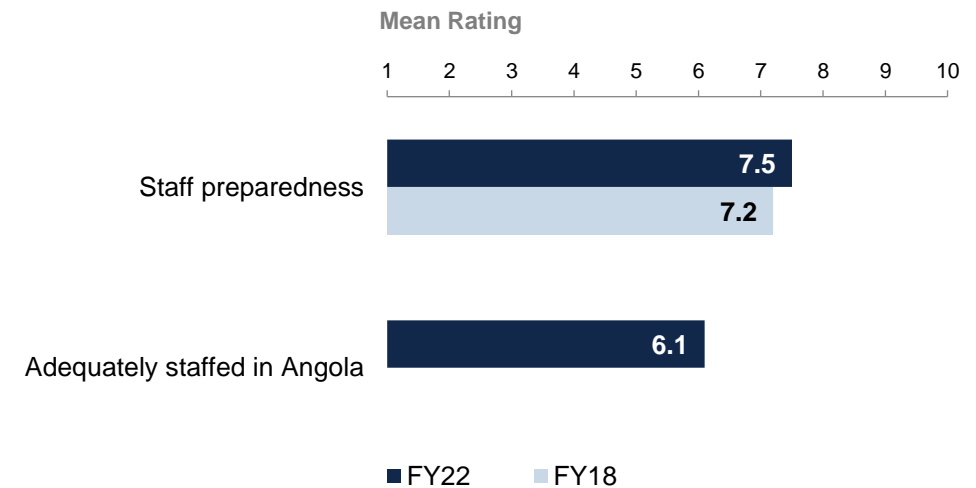


Which of the following do you identify as the World Bank Group's greatest WEAKNESSES in its work in Angola? (Choose no more than 2)  
(FY18 N=406; FY22 N=482)



# Staff Preparedness and WBG Staffing in Angola

In FY22, perceptions of staff preparedness were statistically similar to FY18. Perceptions of the adequacy of the number of staff in Angola; however, were almost a point and a half lower than perceptions of staff preparedness.



To what extent do you believe the World Bank Group's staff is well prepared (e.g., skills mix and knowledge) to help Angola solve its most complicated development challenges?, Scale: 1-10 (1: To no degree at all – 10: To a very significant degree)

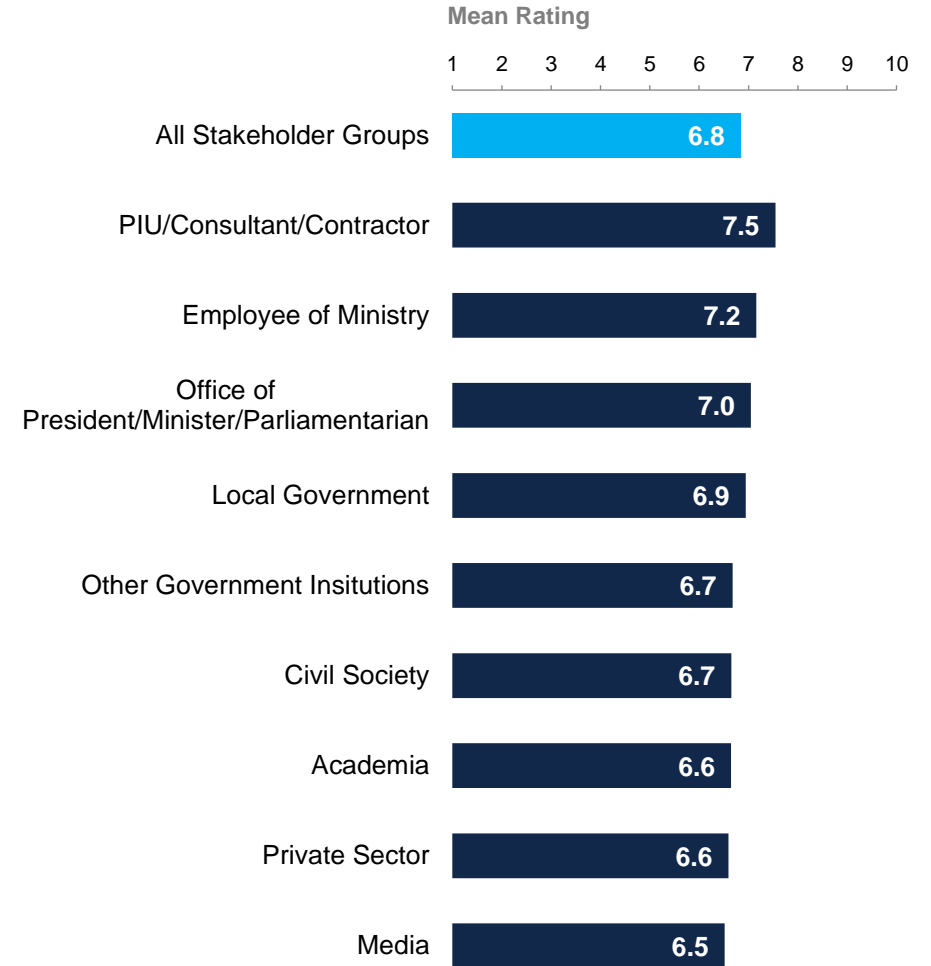
To what extent do you believe the World Bank Group is adequately staffed in Angola?, Scale: 1-10

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

# Overall Ratings for Indicator Questions by Stakeholder Groups

Respondents across **stakeholder groups** gave **statistically similar** rankings for the [twenty-five COS indicator questions](#) about the WBG's performance in Angola.

**Collaboration:** Respondents who collaborate with the WBG had significantly higher mean ratings for the aggregated responses to those same indicator questions (mean rating = 7.3) compared to respondents who do not collaborate with the WBG (mean rating = 6.6).

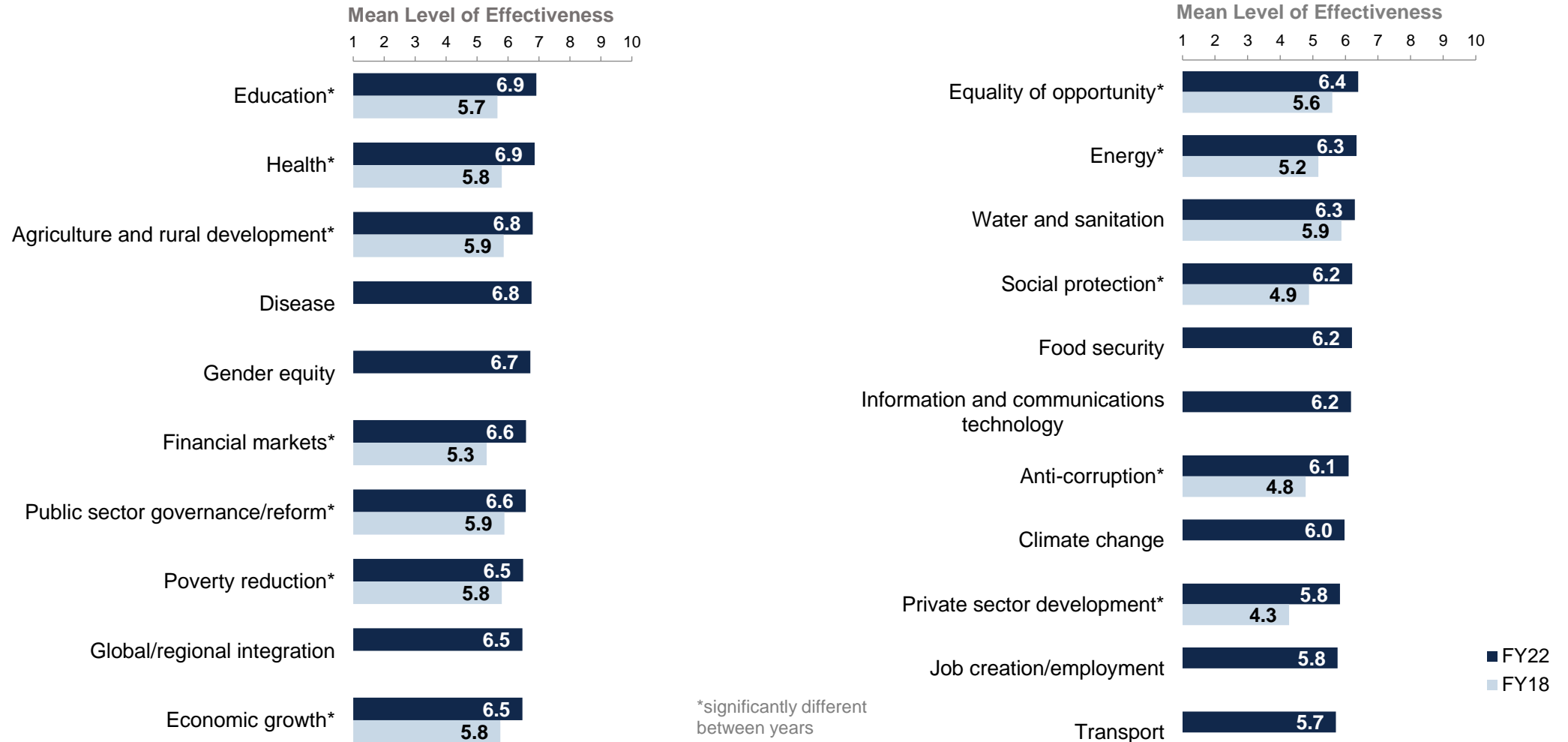




# **World Bank Group's Support in Development Areas**

# Effectiveness of WBG's Support in Sectoral Areas

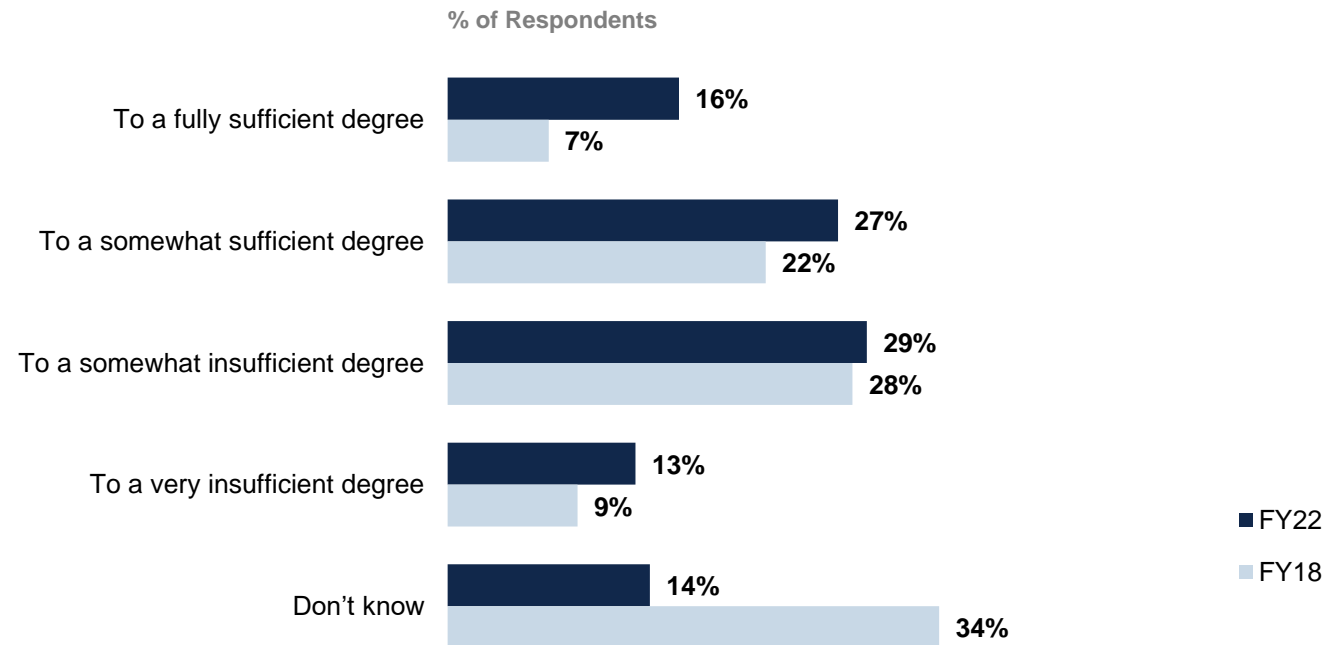
The WBG's work in **education** and **health** sectoral areas received the highest ratings of effectiveness. Perceptions of the WBG's effectiveness in these areas, along with most other sectoral areas increased compared to the FY18 COS.



How EFFECTIVE do you believe the World Bank Group is in terms of the work it does in the following areas of development in Angola?  
(If you have NO exposure to/experience in working in any of the sectors listed below, please respond "Don't know"),  
Scale: 1-10 (1: Not effective at all – 10: Very effective)

# WBG Helping the Poorest People

Respondents' perceptions of the WBG's support to the poorest became more polarized in FY22 compared to FY18, with nearly equal numbers indicating a sufficient degree or an insufficient degree.



To what extent do you believe that the World Bank Group's work and support help the poorest in Angola? (Select only 1 response)  
(FY22 N=494; FY18 N=382)



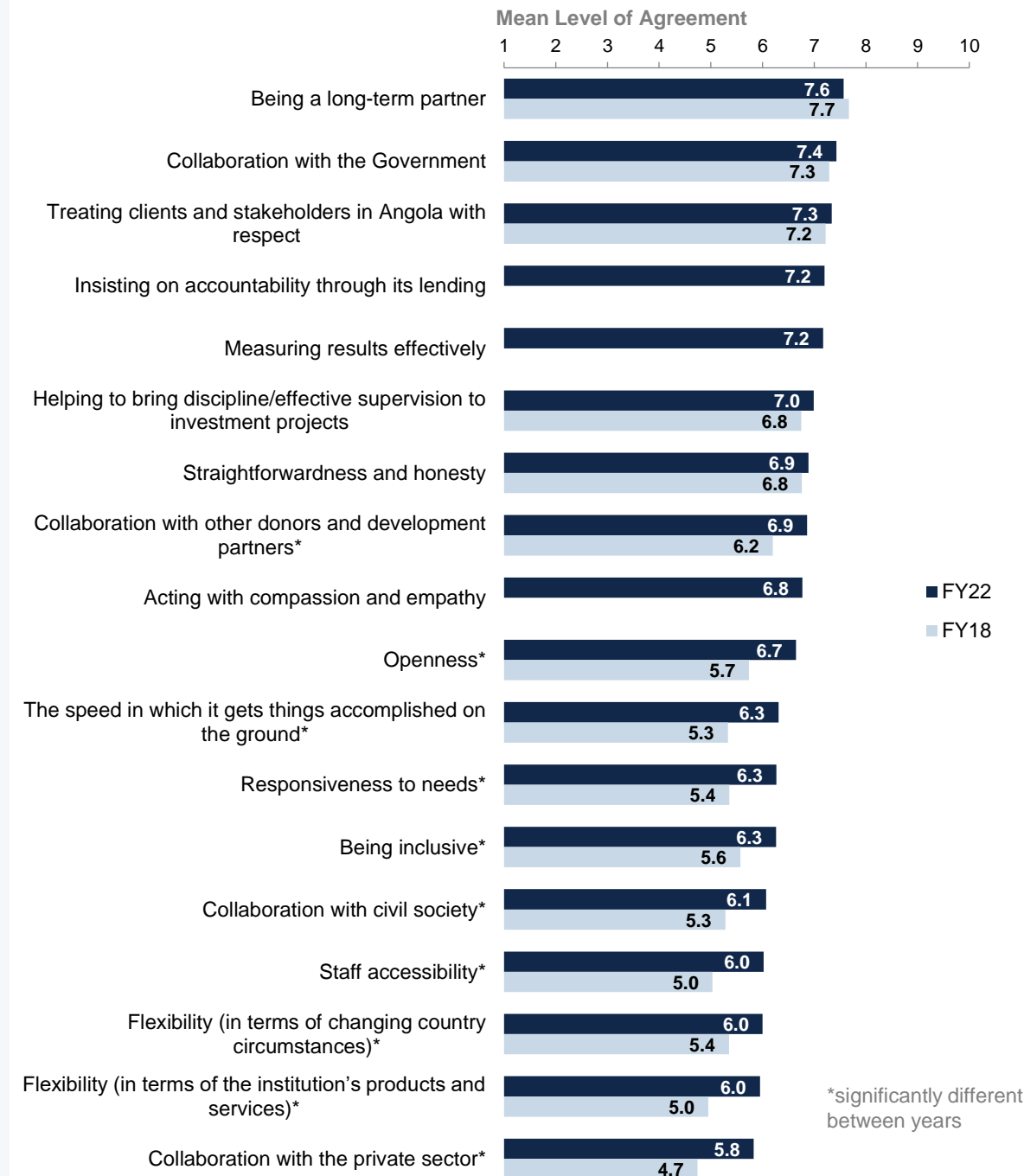
# **World Bank Group's Work and Engagement on the Ground**

# The WBG as a Development Partner

The WBG is seen as a **long-term partner** in Angola that **collaborates with the government**, **treats clients and stakeholders with respect**, and **insists on accountability with its lending**. Perceptions of all aspects were more positive this year compared to FY18, significantly so for several key aspects.

Collaboration with the private sector, even though it was rated significantly more positive this year, remains the lowest rated aspect of the WBG's development partnership.

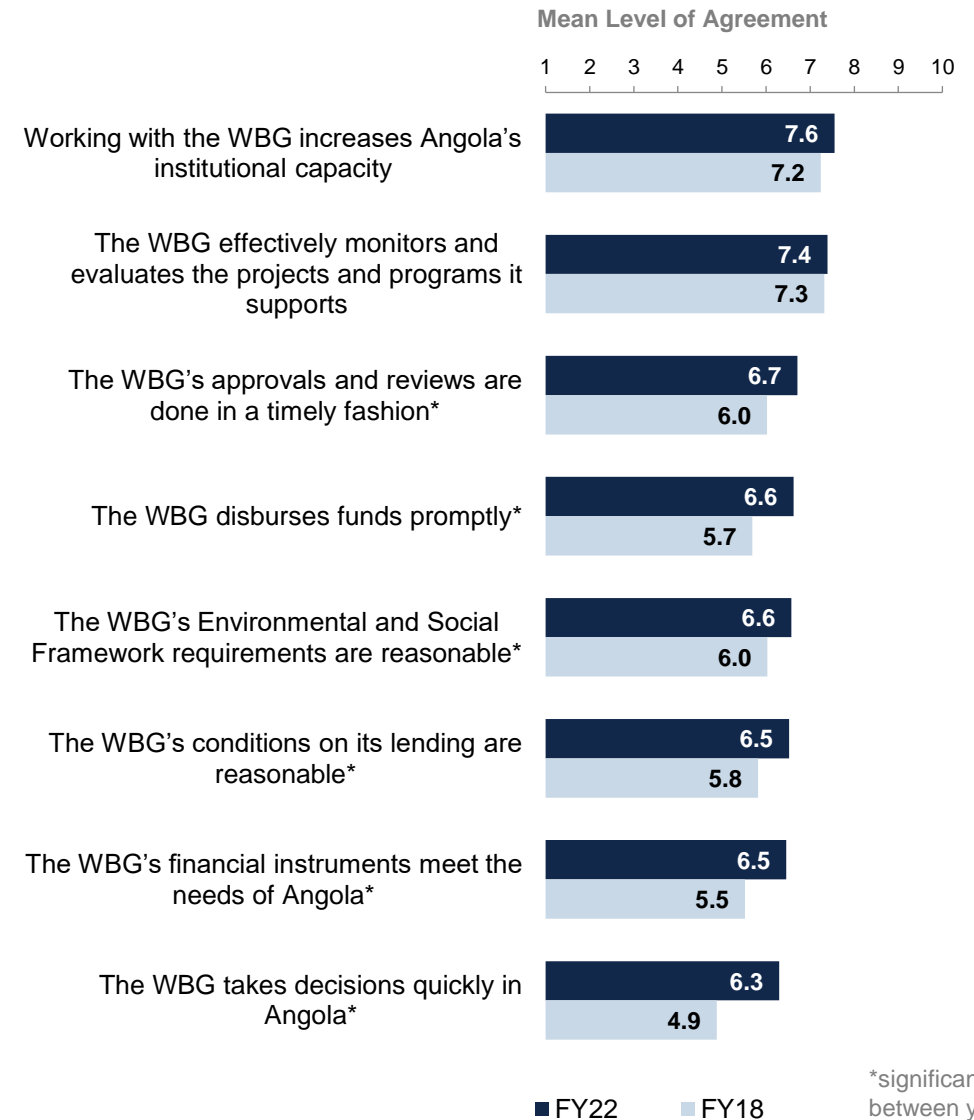
To what extent is the World Bank Group an effective development partner in Angola, in terms of each of the following?, Scale: 1-10 (1: To no degree at all – 10: To a very significant degree)



# The WBG as a Development Partner

Respondents gave the highest ratings for the WBG's work increasing Angola's **institutional capacity** and its effective **monitoring and evaluating of the projects and programs it supports**.

In FY22, respondents rated the WBG **taking decision quickly** and **financial instruments meeting Angola's needs** significantly higher (more than 1-point increase for both).



\*significantly different between years



To what extent do you agree/disagree with the following statements about the World Bank Group in Angola?  
 The World Bank Group's financial instruments (i.e., investment lending, Development Policy Loan, Trust Funds) meet the needs of Angola.  
 Scale: 1-10 (1: Strongly disagree– 10: Strongly agree)

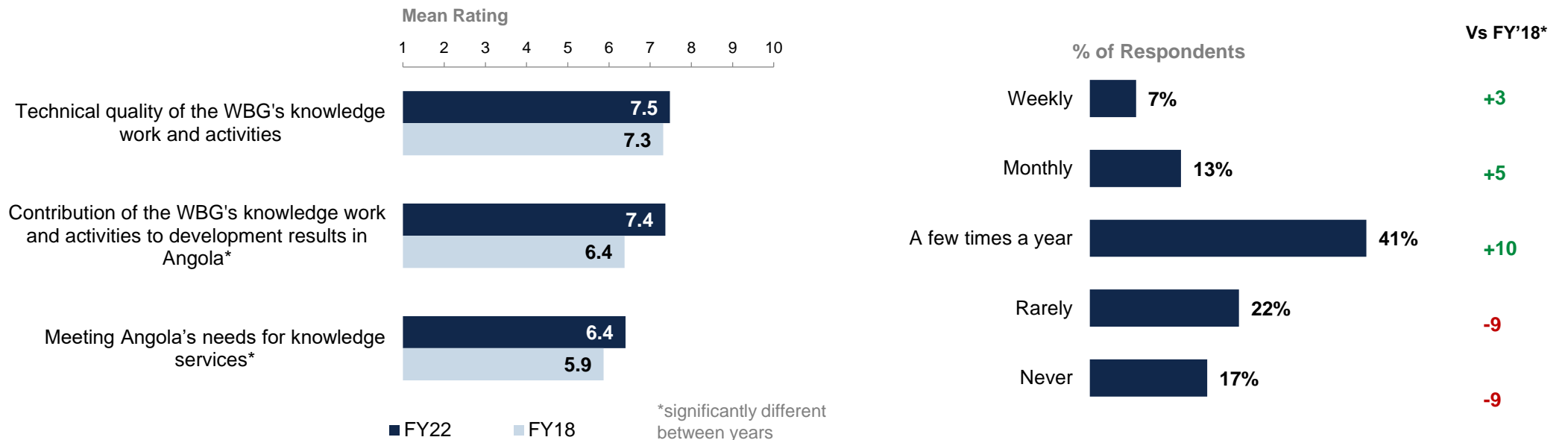


# **World Bank Group's Knowledge Work and Activities**

# WBG's Knowledge Work: Key Indicators

Respondents consistently give the highest ratings for the **technical quality** of the WBG's knowledge products and for their **contribution to development results** in the country, but slightly lower ratings when it comes to **meeting the knowledge needs of Angola**, which suggests that there is an unmet demand for the WBG's knowledge work in the country.

This year's results demonstrate an increased reported use of the WBG's knowledge and activities, with almost half of the respondents consulting WBG a few times a year (41%) or even more often (20%).

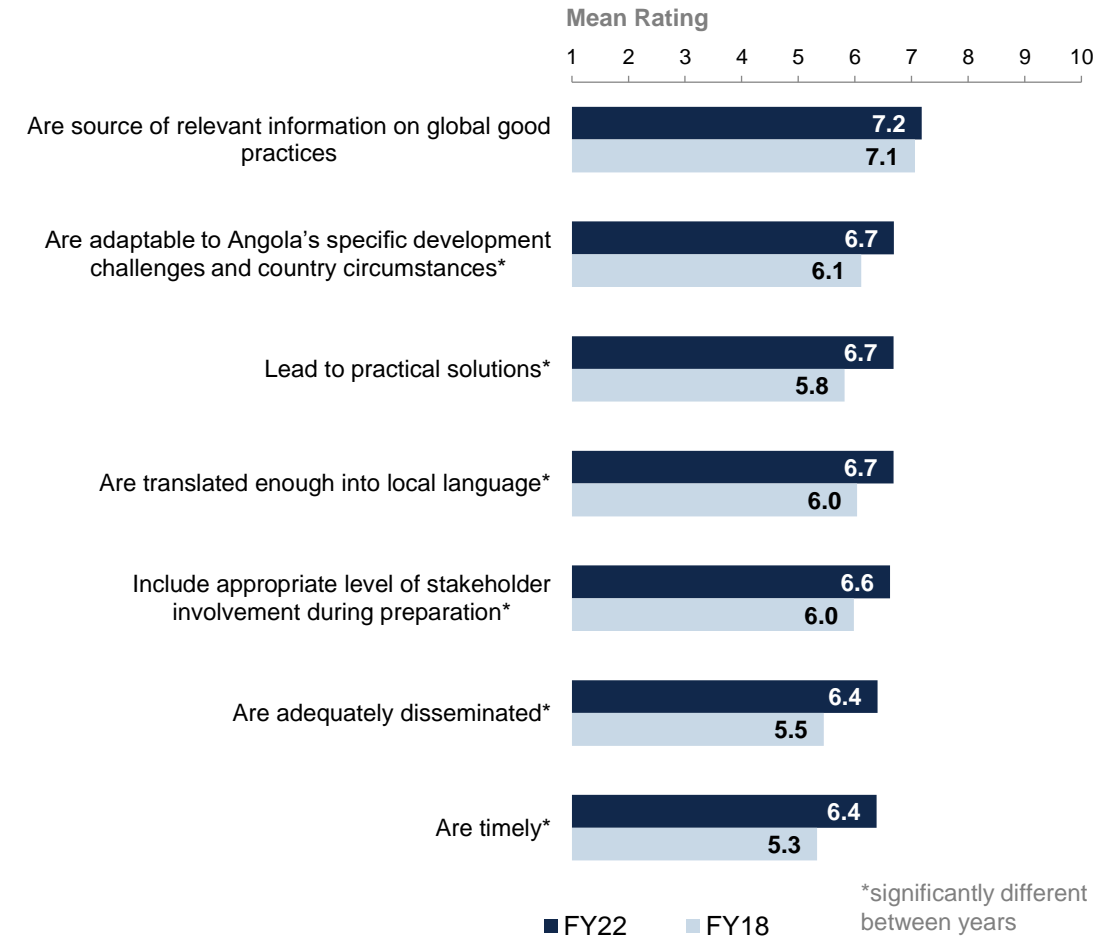


To what extent do you agree/disagree with the following statements about the World Bank Group in Angola? The World Bank Group meets Angola's needs for knowledge services (e.g., research, analysis, data, technical assistance), Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)  
 Overall, how significant a contribution do you believe the World Bank Group's knowledge work and activities make to development results in your country?, Scale: 1-10 (1: Not significant at all– 10: Very significant)  
 Overall, how would you rate the technical quality of the World Bank Group's knowledge work and activities?, Scale: 1-10 (1: Very low technical quality– 10: Very high technical quality)  
 How frequently do you consult World Bank Group's knowledge work and activities in the work you do? (FY18 N= 347; FY22 N=470)

# Attributes of the WBG's Knowledge Work

Similar to FY18, the WBG received the highest ratings for its knowledge products being **a source of relevant information** on global good practices.

Importantly, ratings for nearly all aspects of the WBG's knowledge work were significantly higher this year than in FY18, especially among those aspects that were rated lowest in the past, including the WBG's knowledge work being **timely** and **adequately disseminated**.



In Angola, to what extent do you believe that the World Bank Group's knowledge work and activities;  
Scale: 1-10 (1: To no degree at all – 10: To a very significant degree)

# **The Future Role of the World Bank Group in Angola**

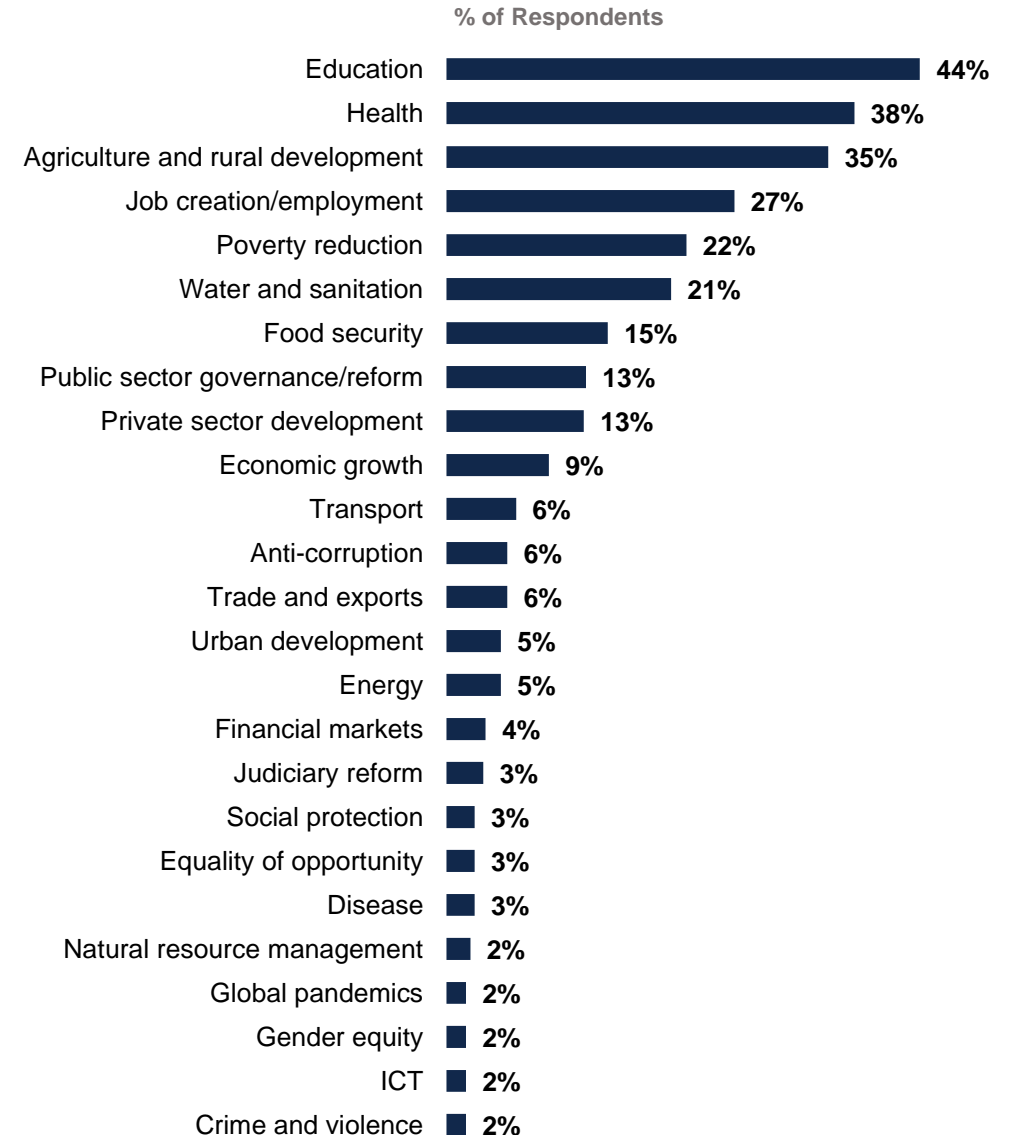
# Areas the WBG Should Prioritize with its Resources

In FY18, respondents most thought the WBG should prioritize **education** in Angola, which was also their top development priority.

Of note, respondents from academia and PIUs/Consultants on WBG projects were the most likely to select education as the top priority area for the WBG whereas respondents from local government, civil society, and the media were more likely to select agriculture and rural development as the top priority for WBG focus.

- Similarly, respondents who identified their primary specialization of work as “education” (21% of the sample) were significantly more likely to indicate that “education” was a top development priority (74%) compared to respondents from other sectors (36%).

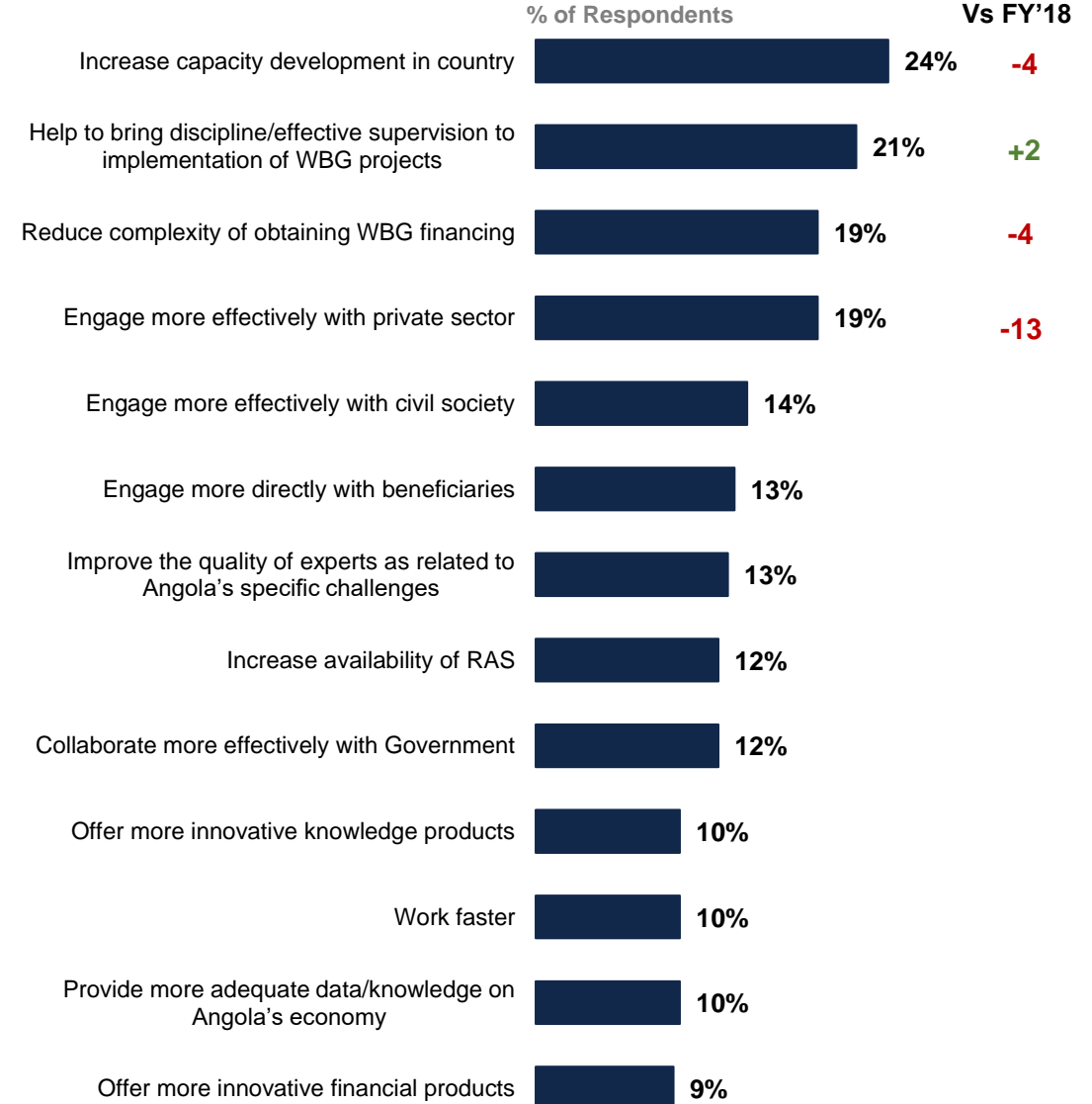
Overall, respondents’ top focus areas for the WBG were aligned with their development priorities for Angola.



# Making the WBG of Greater Value

As in FY18, respondents indicated that to make itself of greater value in Angola, the WBG should increase the level of **capacity development** in the country, help **supervise implementation** of WBG projects, **reduce the complexity of obtaining WBG financing**, and **engage more effectively with private sector** (although this dropped from #1 in FY18 to #4 in FY22).

Of note, a plurality of respondents from PIU/Consultants on WBG projects indicated that **helping to bring discipline/effective supervision to implementation of WBG projects** would make the WBG of greater value (41%).



Which of the following SHOULD the World Bank Group do to make itself of greater value in Angola? (Choose no more than 3) (FY18 =404; FY22 N=467)

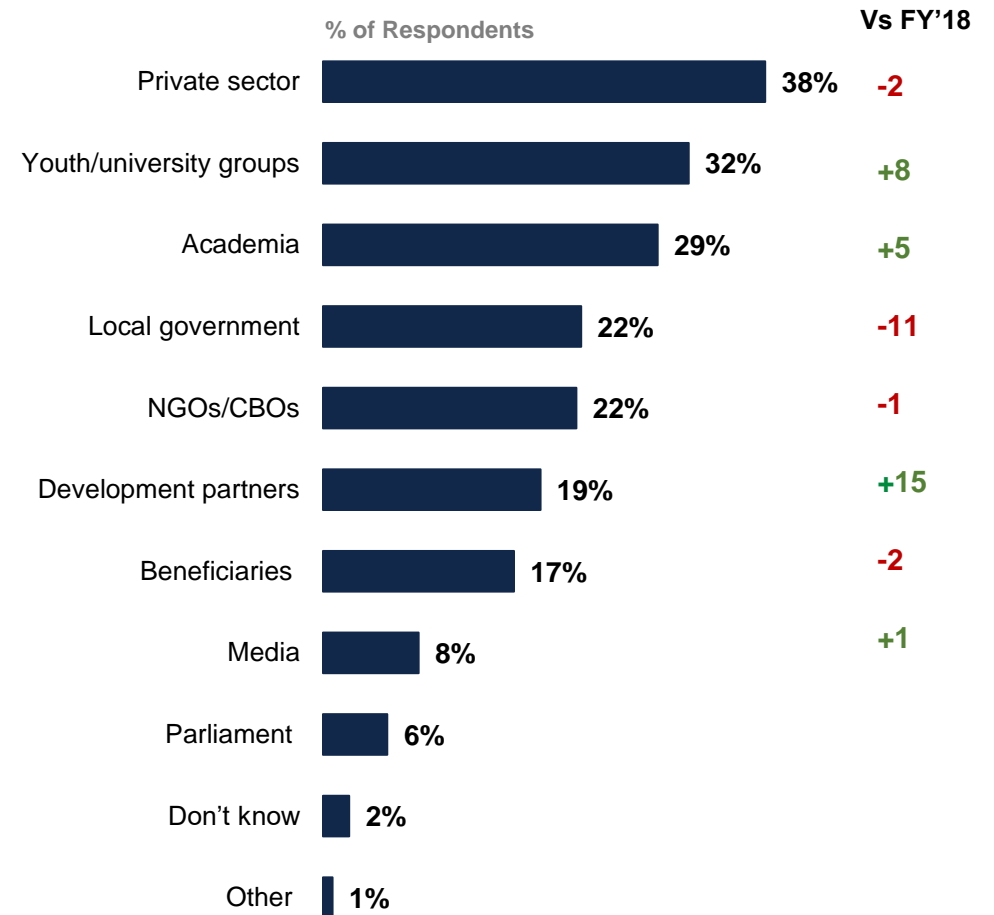
# The WBG Should Collaborate More with ...

As in FY18, respondents indicated that the WBG should collaborate more with **private sector**, **youth/university groups**, **academia**, **local government** (although this dropped 11 percentage points since FY18), and **NGOs/CBOs** in Angola.

More than two-thirds of respondents from the Media indicated that WBG should engage more with **private sector** (68%).

A plurality of respondents from the Office of President/Minister/ Parliamentarian would like more collaboration with **youth/university groups** (42%).

A majority of respondents from academia (68%), want more collaboration with **Academia**.



In addition to the regular relations with the national government, which THREE of the following groups should the World Bank Group collaborate with more in your country? (Choose no more than 3) (FY18 N=379; FY 22 N=482)

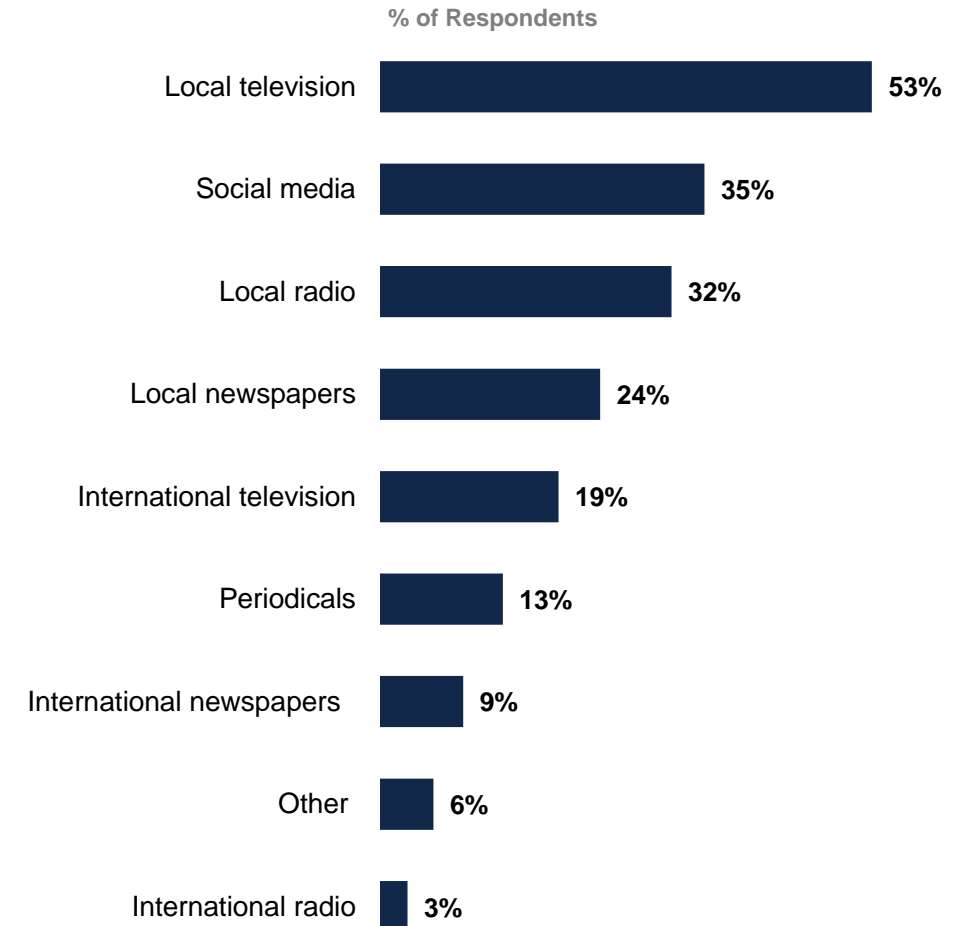


# Communication and Outreach

# General Information Sources

Respondents reported using a variety of news sources, but a majority (53%) use **local television**, as respondents also reported in FY18.

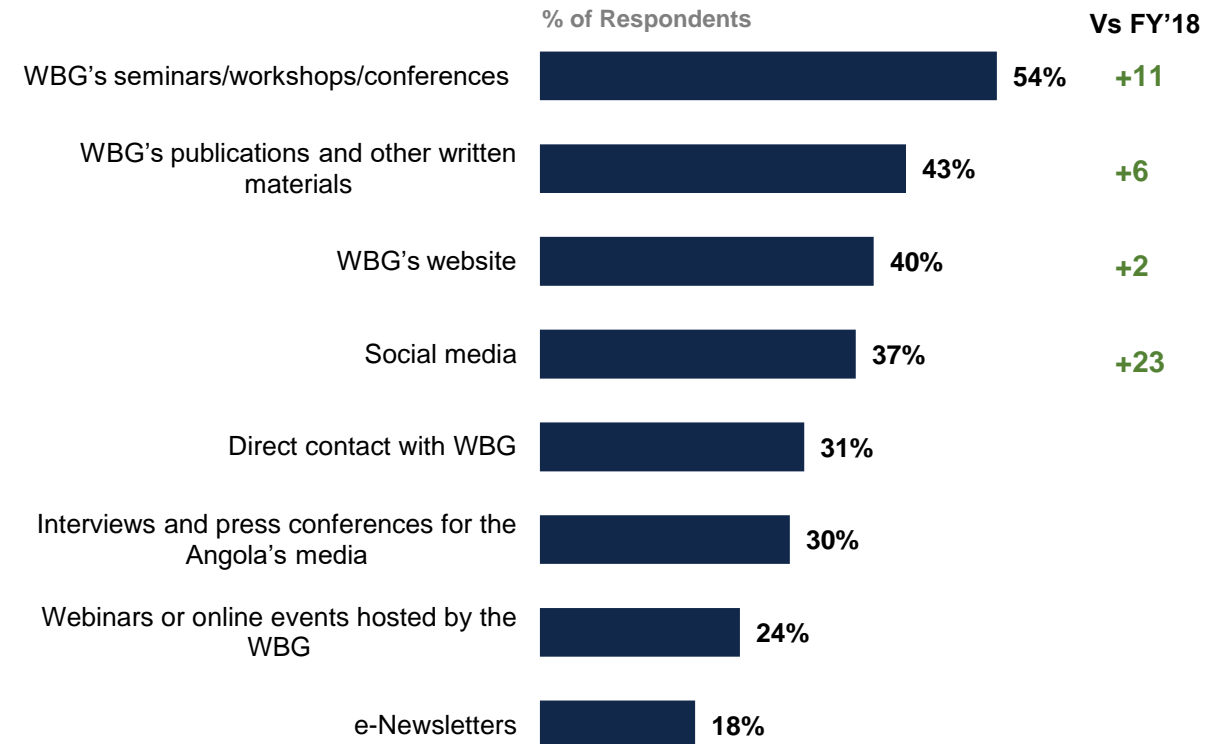
Approximately a third of respondents reported using **social media** and **local radio**, with local radio being the most utilized among respondents from academia, other government institutions, and private sector. Respondents from media, academia, and private sector were the most likely to use **social media**. Respondents from the Office of President/Minister/Parliamentarian, local government, employees of ministries, and PIUs/Consultants on WBG projects are the most likely to use **local television**.



# Preferred WBG Information Sources

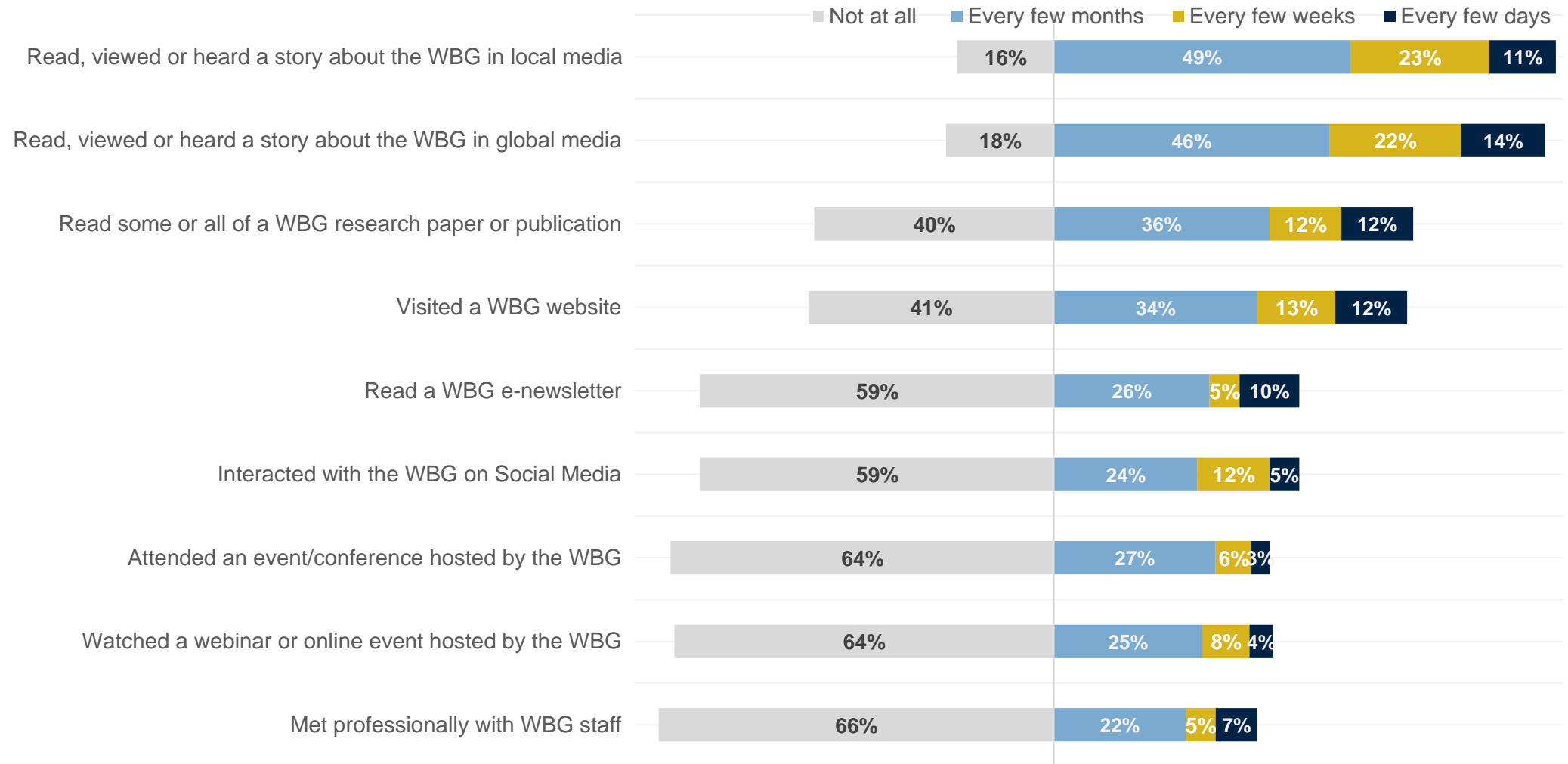
Respondents were split over the ways they prefer to obtain information from the WBG, with just over half giving preference to the **WBG's seminars, workshops, and conferences**.

The top 3 preferred informational sources were similar to those in FY18; however, **social media** increased as a preferred source in FY22.



# Frequency of WBG Engagement

Press coverage in local or global media were the most frequent engagements with the WBG, followed by consulting WBG research papers or visiting the WBG website.



# Demographics of the Sample

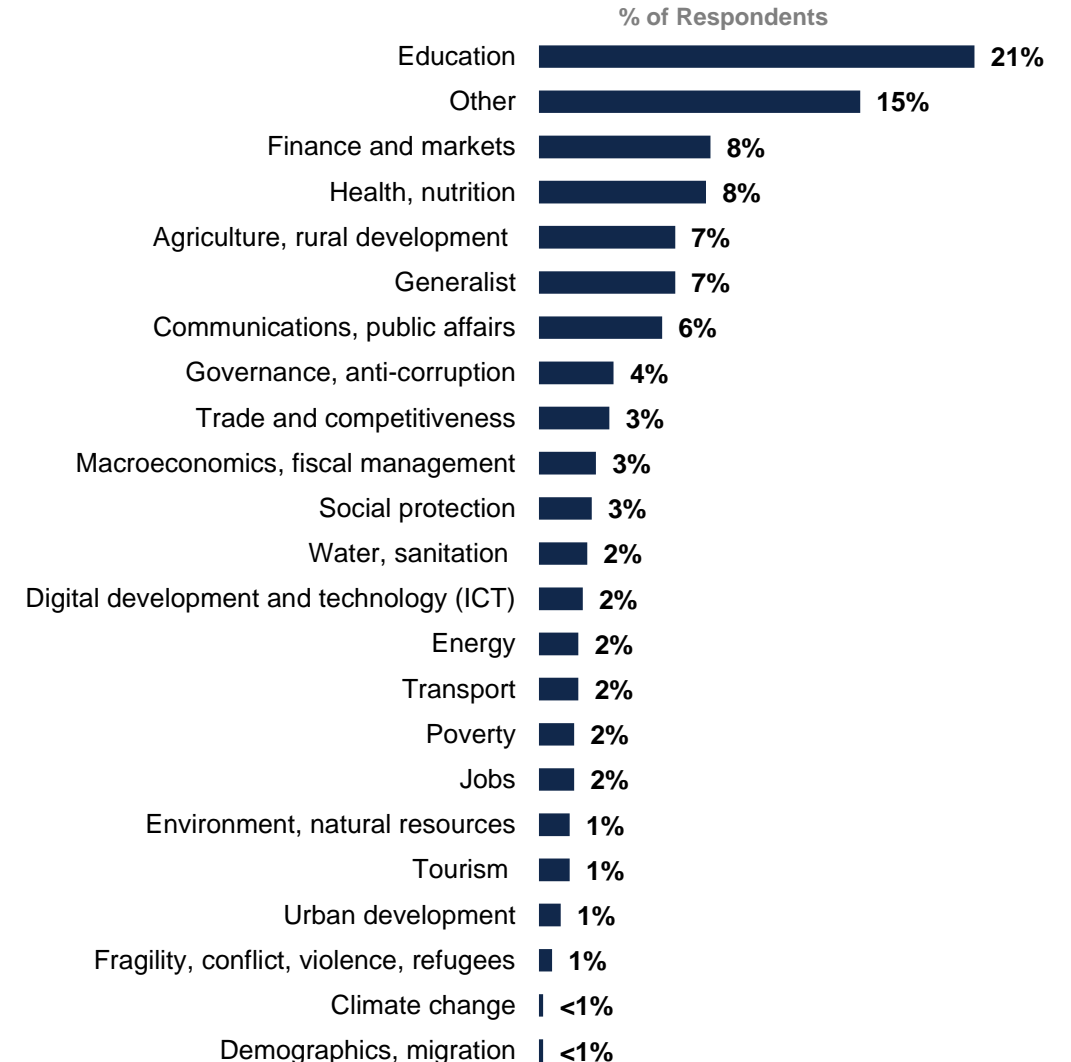
# Respondent Profile: Affiliation and Specialization

## Current Affiliation



*Note that for further analyses, some respondent groups were combined (for details in the [Methodology section](#))*

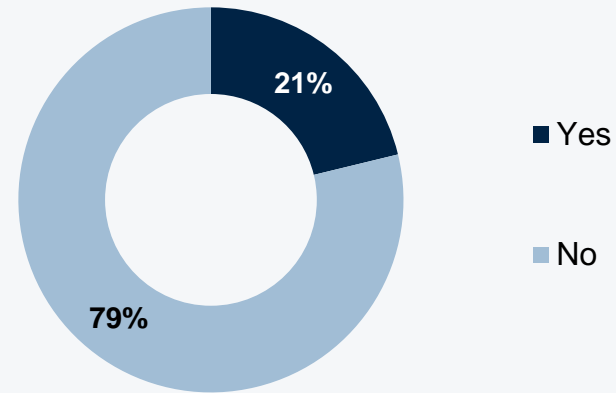
## Specialization



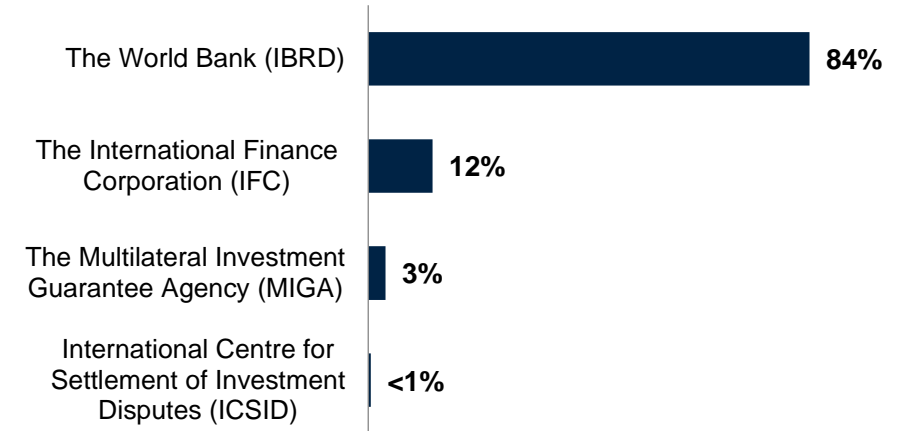
Which of the following best describes your current affiliation? (Select only 1 response) (N=482)  
Please identify the primary specialization of your work. (Select only 1 response) (N=476)

# Respondent Profile: Collaboration with the WBG

Collaboration with the WBG



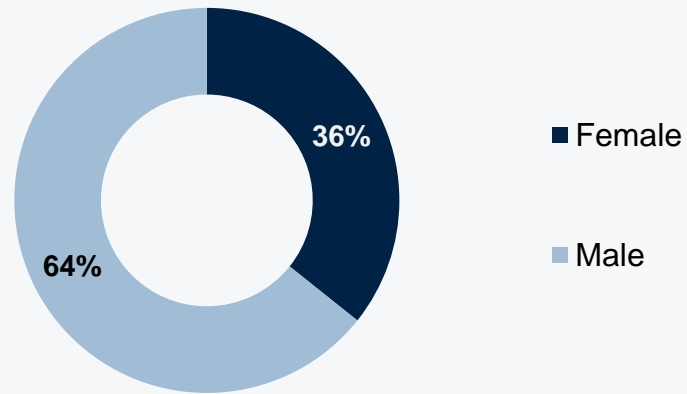
Collaboration Institution



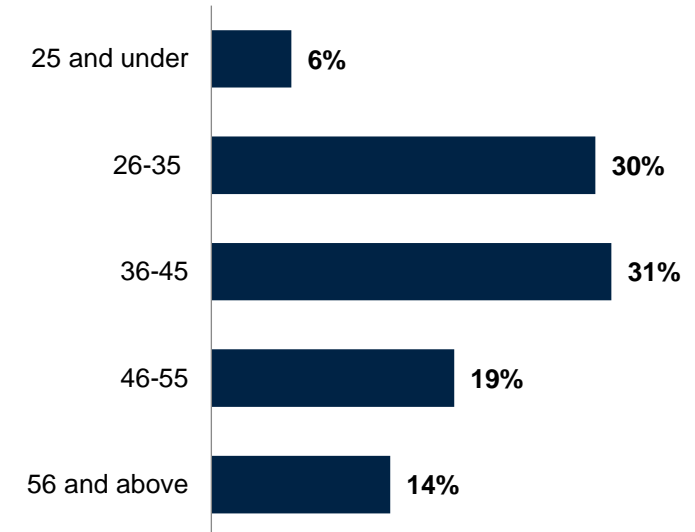
Currently, do you professionally collaborate/work with the World Bank Group (IBRD, IFC, MIGA, ICSID) in your country? (N=448)  
Which of the following agencies of the World Bank Group do you primarily collaborate/work with in Angola? (Select only ONE response) (N=213)

# Respondent Profile: Demographics

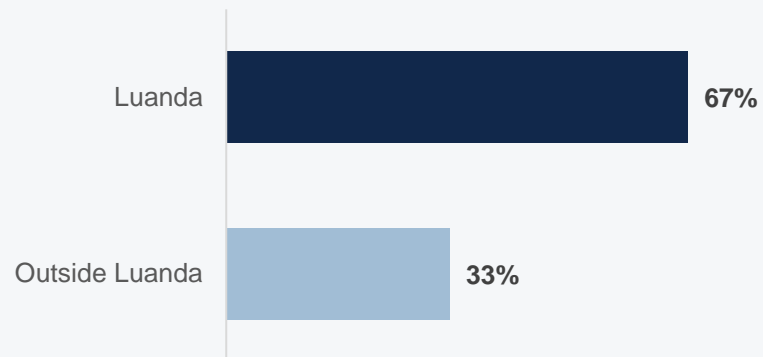
**Gender**



**Age**



**Location**



What's your gender? (N=476)

What's your age (N=482)

Which best represents your geographic location? (N=472)

# Methodology

# Methodology

**From September 2021 to March 2022**, 804 stakeholders of the WBG in Angola were invited to provide their opinions on the WBG's work in the country by participating in a Country Opinion Survey. Participants were drawn from the Office of the President, Prime Minister; office of a Minister; office of a member of Parliament/legislative body; employees of ministries, ministerial departments, and implementation agencies; project implementation units (PIUs) overseeing implementation of WBG projects; consultants and contractors working on WBG-supported projects and programs; local governments; independent government institutions; the judicial system; state-owned enterprises; bilateral and multilateral agencies; private sector organizations; the financial sector and private banks; private foundations; NGOs and community-based organizations; professional and trade associations; faith-based groups; youth groups; the academia, research institutes, and think tanks; and the media.

**A total of 502 stakeholders participated in the survey (62% response rate).** Respondents completed the questionnaire via an online platform, or they received a paper questionnaire via a courier and returned it accordingly.

Every country that engages in the Country Opinion Survey (COS) must include specific indicator questions that will be aggregated for the World Bank Group's annual Corporate Scorecard (please refer to the [Indicator questions](#) section of this report).

# Year Comparisons

The results of this year's Country Survey were compared to those in the Country Survey conducted in FY18 (response rate was 45%, N=444).

Comparing responses across Country Surveys reflect changes in attitudes over time, but also changes in respondent samples and changes to the survey instrument itself. To reduce the influence of the latter factor, only those questions with similar response scales/options were analyzed.

The distribution of respondent samples from the FY18 and FY22 Country Surveys used in the year comparisons analyses are listed in the table on the right. This year's survey saw an increased outreach to and response from government institutions and civil society organizations, but a decrease in responding from high-level government offices and bilateral/multilateral organizations. These differences in stakeholder compositions among survey respondents should be taken into account when interpreting the results of the past-year comparison analyses.

% of Respondents	FY 2018	FY 2022
<b>High-level government offices:</b> Office of the President, Office of Prime Minister, Office of a Minister, Office of a member of Parliament / legislative body	9%	5%
<b>Government Institutions:</b> employees of ministries, Project Implementation Unit (PIUs)/consultants on WBG-supported projects, independent government institutions, the judiciary, and state-owned enterprises)	20%	31%
<b>Local government</b>	16%	16%
<b>Bilateral/multilateral agency:</b> embassy, diplomatic, military, UN, regional development bank	5%	1%
<b>Civil Society Organizations (CSO):</b> NGOs/community-based organizations, private foundations, faith-based groups, professional/trade associations, and youth groups	15%	18%
<b>Private Sector:</b> private sector organizations and financial sector/private banks	14%	12%
<b>Academia/Research Institute/Think Tank</b>	9%	8%
<b>Media</b>	4%	5%
<b>Other</b>	7%	4%
<b>Total Number of Respondents</b>	341	482

# Statistical Analysis

To analyze responses by stakeholder groups, responses to the question [“Which of the following best describes your current affiliation?”](#) were re-grouped and recoded into nine groups (please see the table to the right).

## Scale bucketing:

When mentioning **Low**, **Neutral**, and **High** in scales throughout the report: 1-5 is low, 6-7 is neutral and 8-10 is high.

## Statistical significance:

Key statistically significant findings are noted throughout the report, please refer to the Appendix (a separate attachment) for a complete detail of responding

Significance is measured at  $p$ -value < .05

Groups	n	%
<b>Office of the President, Prime Minister/ Minister / Parliamentarian</b> – Includes respondents from the three high-level government offices	24	5%
<b>Employee of a Ministry</b> – includes employees of ministries	32	7%
<b>PIU/Consultant/Contractor</b> -- respondents from project implementation units (PIUs) / consultants on WBG-supported projects	52	11%
<b>Local government</b>	77	16%
<b>Other government institutions</b> includes independent government institutions, state-owned enterprises, judicial system	67	14%
<b>Private Sector:</b> includes private sector organizations and financial sector/private banks	56	12%
<b>Civil Society:</b> NGOs/community-based organizations, professional/trade associations, Faith-based and youth groups	89	18%
<b>Academia/Research Institute/Think Tank</b>	37	8%
<b>Media</b>	24	5%
<b>Other:</b> Includes respondents from the Bilateral/Multilateral and Other organizations	24	5%
<b>Total</b>	482	100%

# Indicator questions

- A7\_2.** To what extent do you trust the World Bank Group to do what is right? Scale: 1-10 (1: To no degree at all – 10: To a very significant degree)
- B2.** Overall, the World Bank Group currently plays a relevant role in development in Angola, Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)
- B3.** The World Bank Group's work is aligned with what I consider the development priorities for Angola, Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)
- B4\_1.** Overall, please rate your impression of the effectiveness of these organizations in Angola. The World Bank (IBRD)(1: Not effective at all – 10: Very effective)
- B5.** To what extent does the World Bank Group's work help to achieve development results in Angola? Scale: 1-10 (1: To no degree at all– 10: To a very significant degree)
- B6.** To what extent does the World Bank Group influence the development agenda in Angola? Scale: 1-10 (1: To no degree at all– 10: To a very significant degree)
- C2:C14.** To what extent is the World Bank Group an effective development partner in Angola, in terms of each of the following? – Collaboration with the private sector, Being inclusive, Straightforwardness and honesty, **Access to WBG staff and experts**, Being a long-term partner, **Responsiveness to needs**, Collaboration with the Government, Flexibility when circumstances change, Collaboration with civil society, Treating clients and stakeholders in Angola with respect, Openness (sharing data and other information), **Collaboration with other donors and development partners**, Scale: 1-10 (1: To no degree at all – 10: To a very significant degree)
- C15.** To what extent do you agree/disagree with the following statement? – The World Bank Group takes decisions quickly in Angola, Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)
- C23:C24.** To what extent do you agree/disagree with the following statements about the World Bank Group in Angola? – The World Bank Group's financial instruments (i.e., investment lending, Development Policy Loan, Trust Funds, etc.) meet the needs of Angola, The World Bank Group meets Angola's needs for knowledge services (e.g., research, analysis, data, technical assistance), Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)
- E8.** In Angola, to what extent do you believe that the World Bank Group's knowledge work and activities: Are adaptable to Angola's specific development challenges and country circumstances, Scale: 1-10 (1: To no degree at all– 10: To a very significant degree)
- E9.** Overall, how significant a contribution do you believe the World Bank Group's knowledge work and activities make to development results in your country?, Scale: 1-10 (1: Not significant at all – 10: Very significant)
- E10.** Overall, how would you rate the technical quality of the World Bank Group's knowledge work and activities? Scale: 1-10 (1: Very low technical quality – 10: Very high technical quality)

Note: Corporate Scorecard questions are highlighted **RED**