

March 2023



Country Opinion Surveys

FY 2022 Panama Country Opinion Survey Report

ECR Business Intelligence Team



WORLD BANK GROUP

Acknowledgements

The Panama 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.

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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 Panama 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 Panama'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?



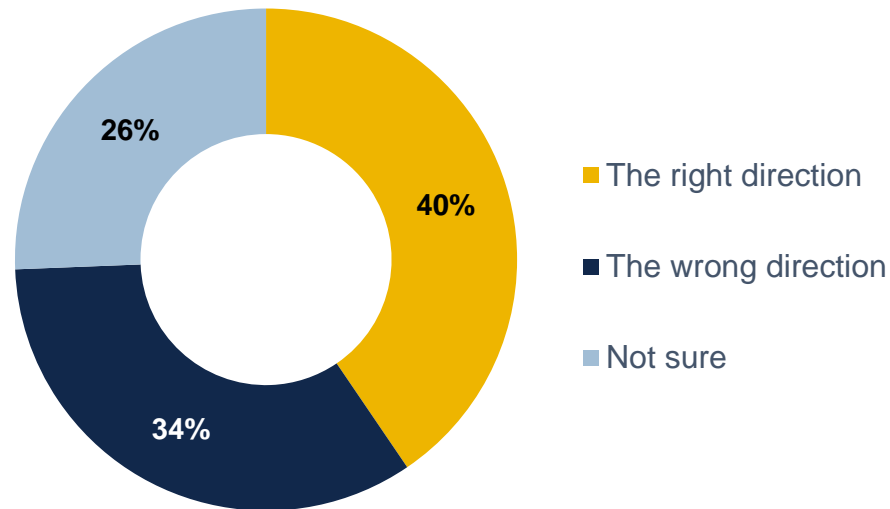
Country Opinion Surveys

Overall Context

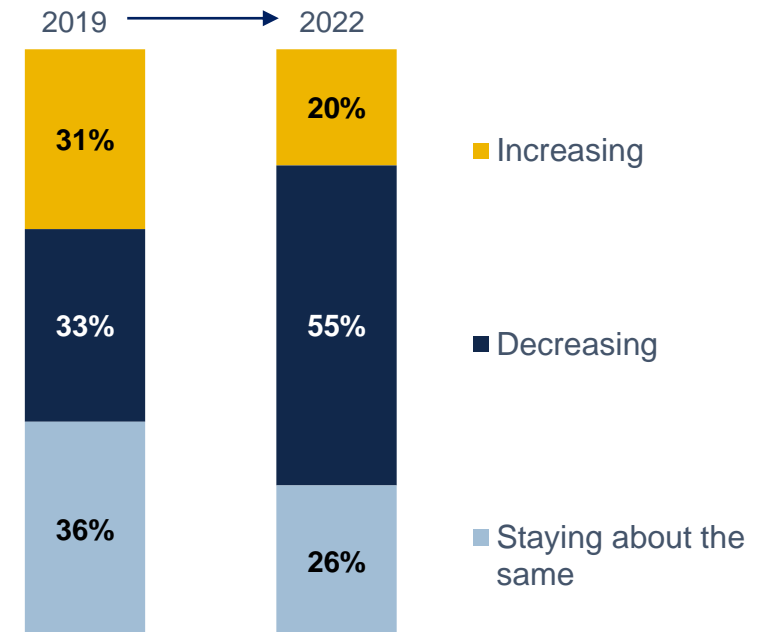
Country Direction and Economic Opportunity

Although 4 in 10 respondents felt that Panama is headed in the right direction, a majority of respondents felt that economic opportunities in the country are decreasing, a noticeable increase compared to the FY19 results.

Country Direction



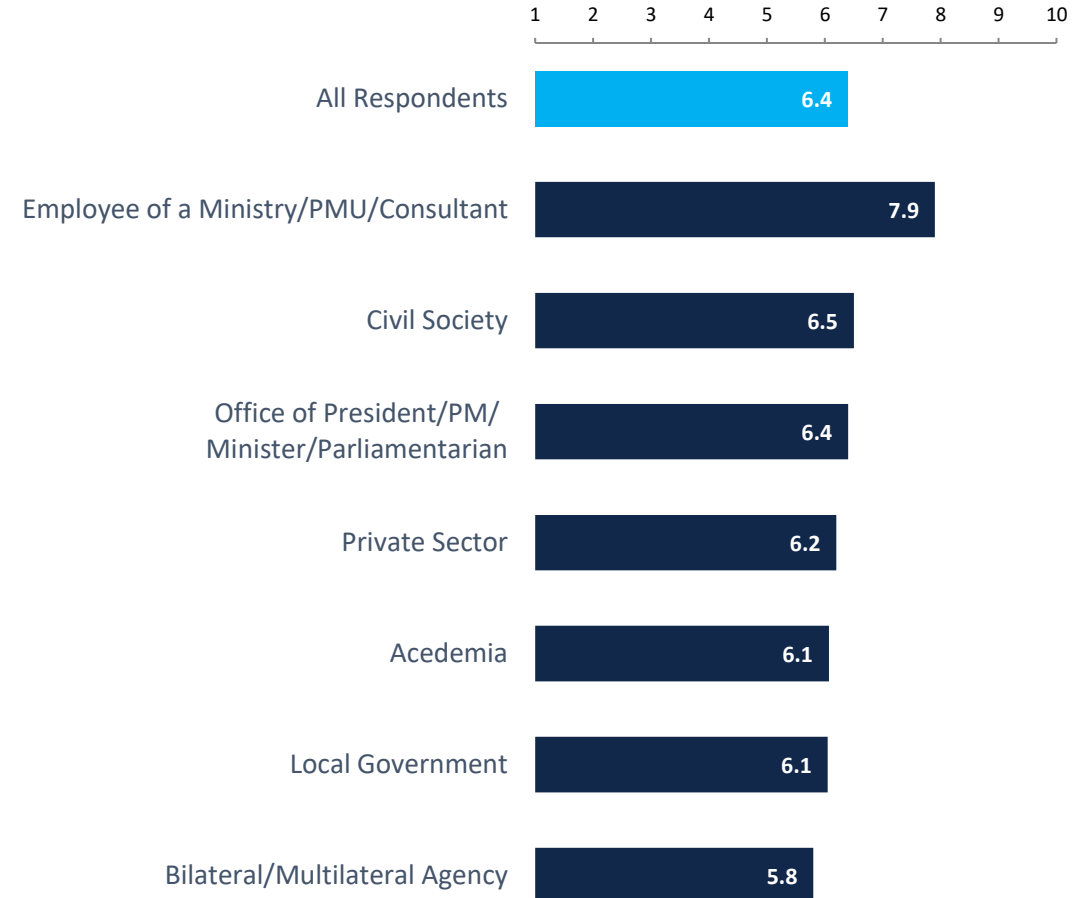
Perceptions of Economic Opportunity



Familiarity with the World Bank Group

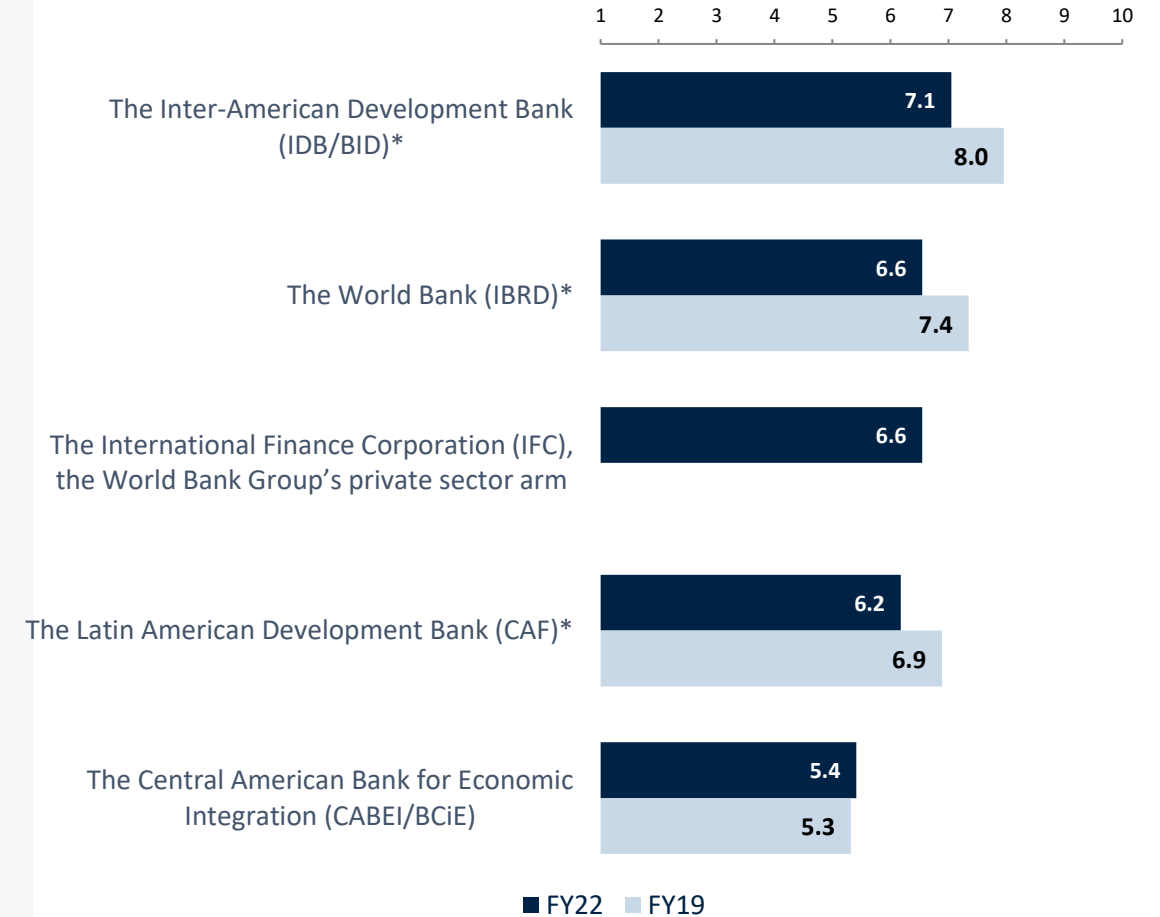
Year comparison: Respondents in this year's Country Survey had significantly lower levels of familiarity with the World Bank compared to FY19 (FY22 mean = 6.4; FY19 mean = 7.5)

Collaboration: Respondents who collaborate with the WBG reported significantly higher levels of familiarity with the work of the World Bank compared to respondents who do not collaborate (WB collaborators mean = 8.4; non-collaborators mean = 6.2).



Familiarity with the WBG vs. Other Development Banks

Stakeholders express higher familiarity with the work of Inter-American Development Bank than the World Bank. However, this year ratings for all development banks were significantly lower than in FY19.



Development Priorities

Although **education** remains the top development priority this year as it was in FY19, there were fewer respondents selecting it this year.

Job creation/employment significantly grew in importance, from 13% of respondents selecting it in FY19 to 55% in FY22, making it the #2 development priority.

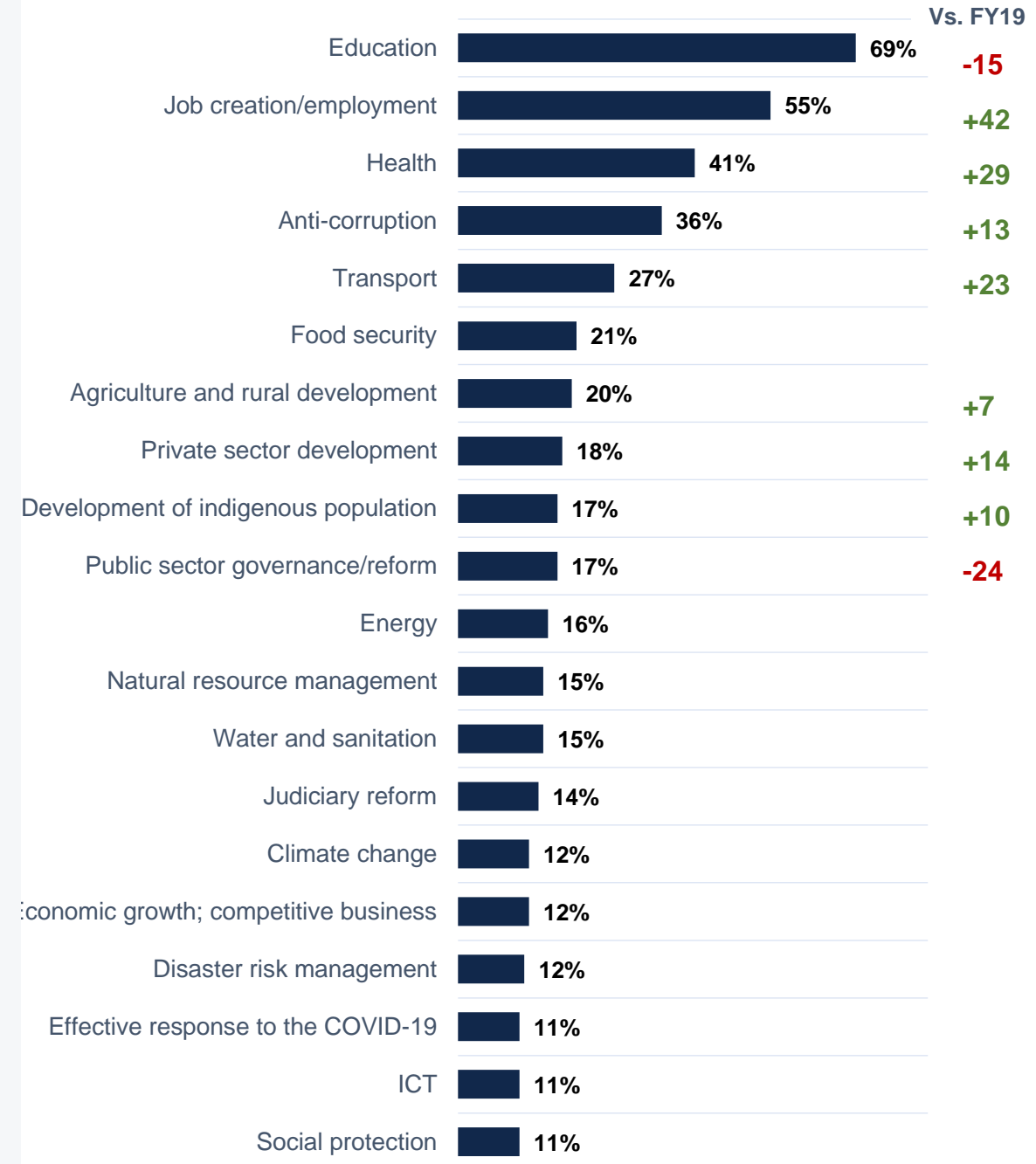
Noticeable increases in priority were also seen for **health**, **anti-corruption** and **transport**, which rounded out the top five priorities in FY22.

Public sector governance/reform, the #3 priority in FY19, waned significantly in priority this year.

It should be noted that there was a change in the methodology for this question: In FY19, respondents could select up to three priorities, while in FY22 they could select up to five.



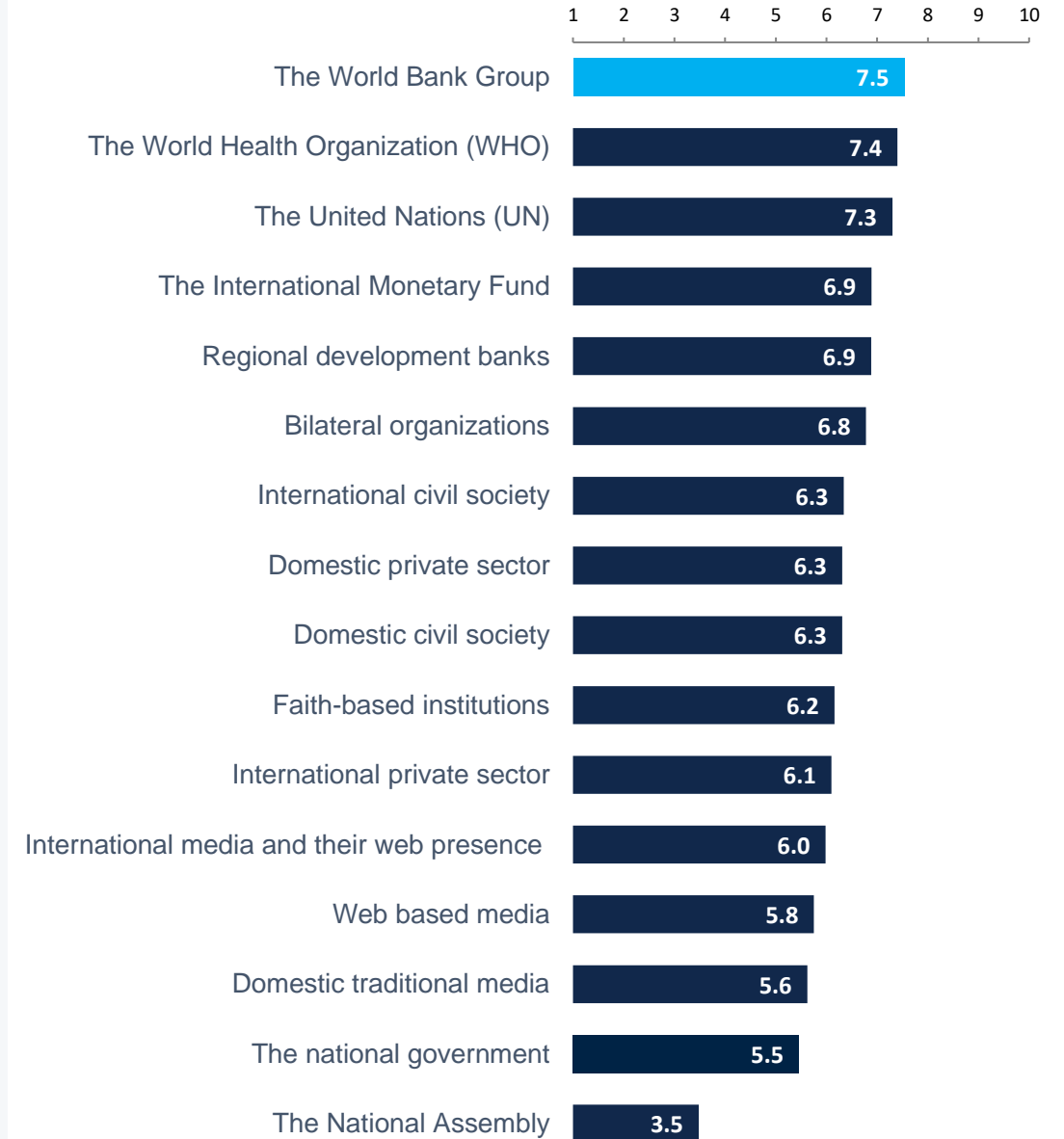
Please identify which of the following development priorities you consider the most important in Panama. (Choose no more than 5) (N=121). % of respondents shown.



Trust in Institutions

The WBG, along with the WHO and UN, are the most trusted organizations in Panama.

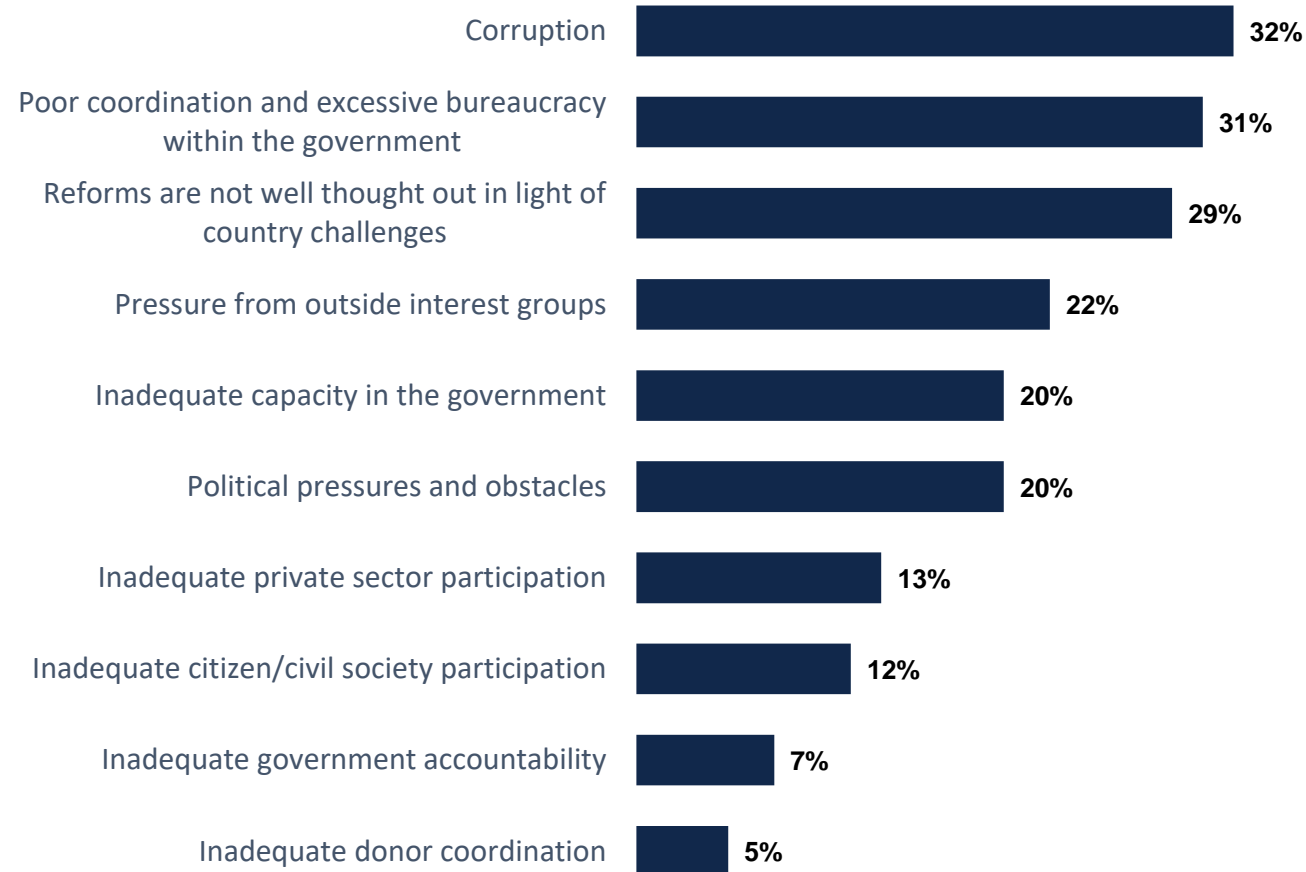
The national government and National Assembly were the least trusted institutions. Media (international, domestic, and web-based) were trusted only slightly more than the national government.



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

Attribution of Failure

Corruption, poor coordination and excessive bureaucracy within the government, and reforms not well thought out in light of country challenges were the main reasons for slow/failed reforms in Panama according to respondents.



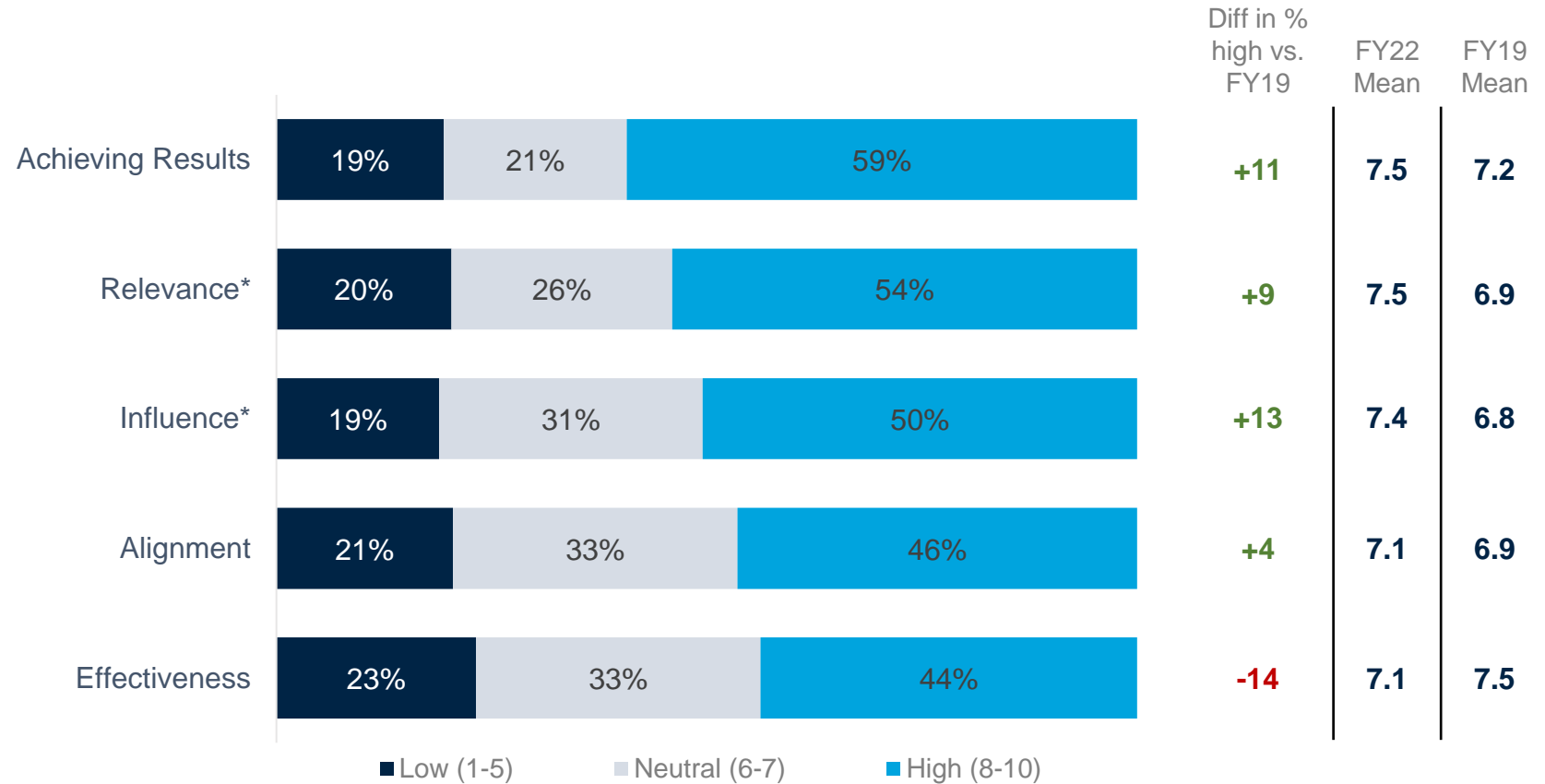


Country Opinion Surveys

Overall Attitudes toward the World Bank Group

Key Performance Indicators

In FY22, responses to the key indicator questions were notably higher than the FY19 COS, significantly so for the WBG's relevance, influence, and overall effectiveness.



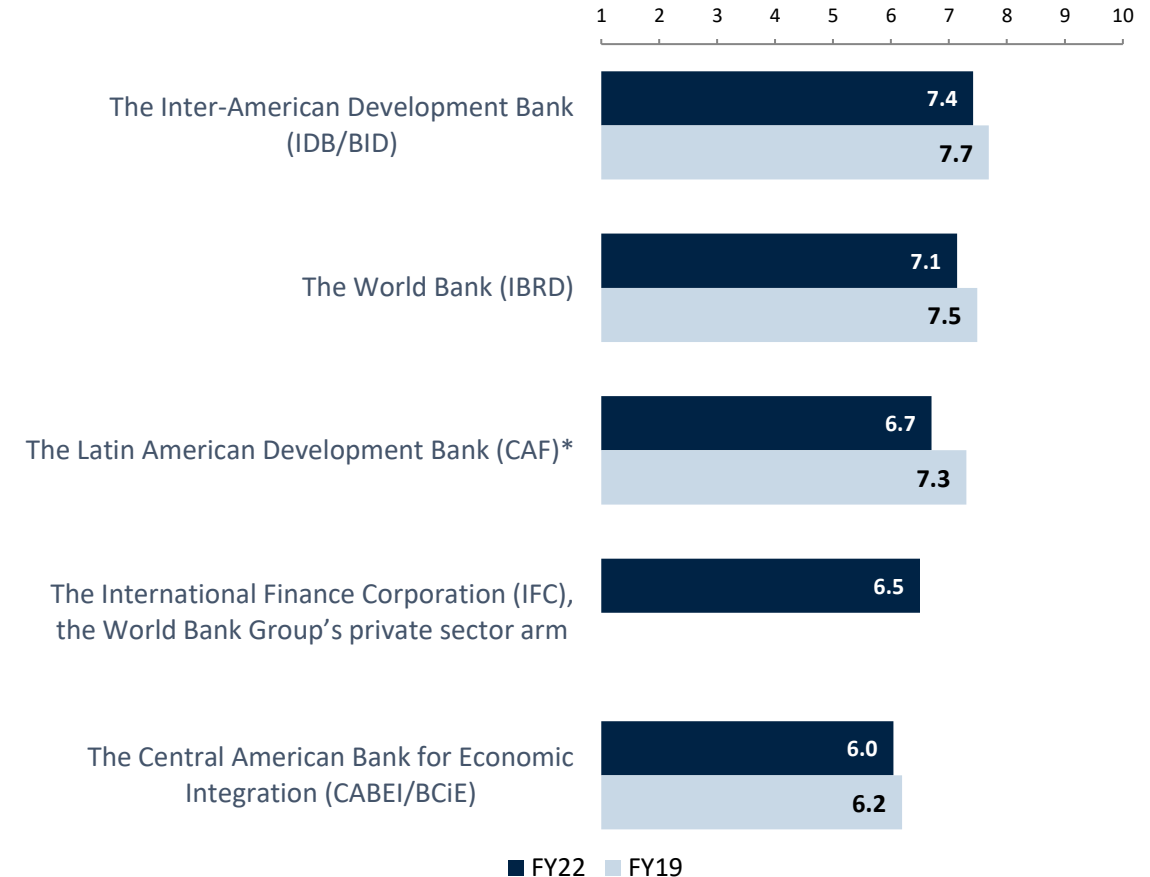
*significantly different between years



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

Effectiveness of the WBG vs. Other Development Banks

As in FY19, respondents gave the highest effectiveness ratings to **The Inter-American Development Bank (IDB/BID)** and **The World Bank (IBRD)**.



Greatest Value

Capacity development related to WBG supported projects and financial resources were the most highly valued activity of the WBG in Panama, according to respondents.

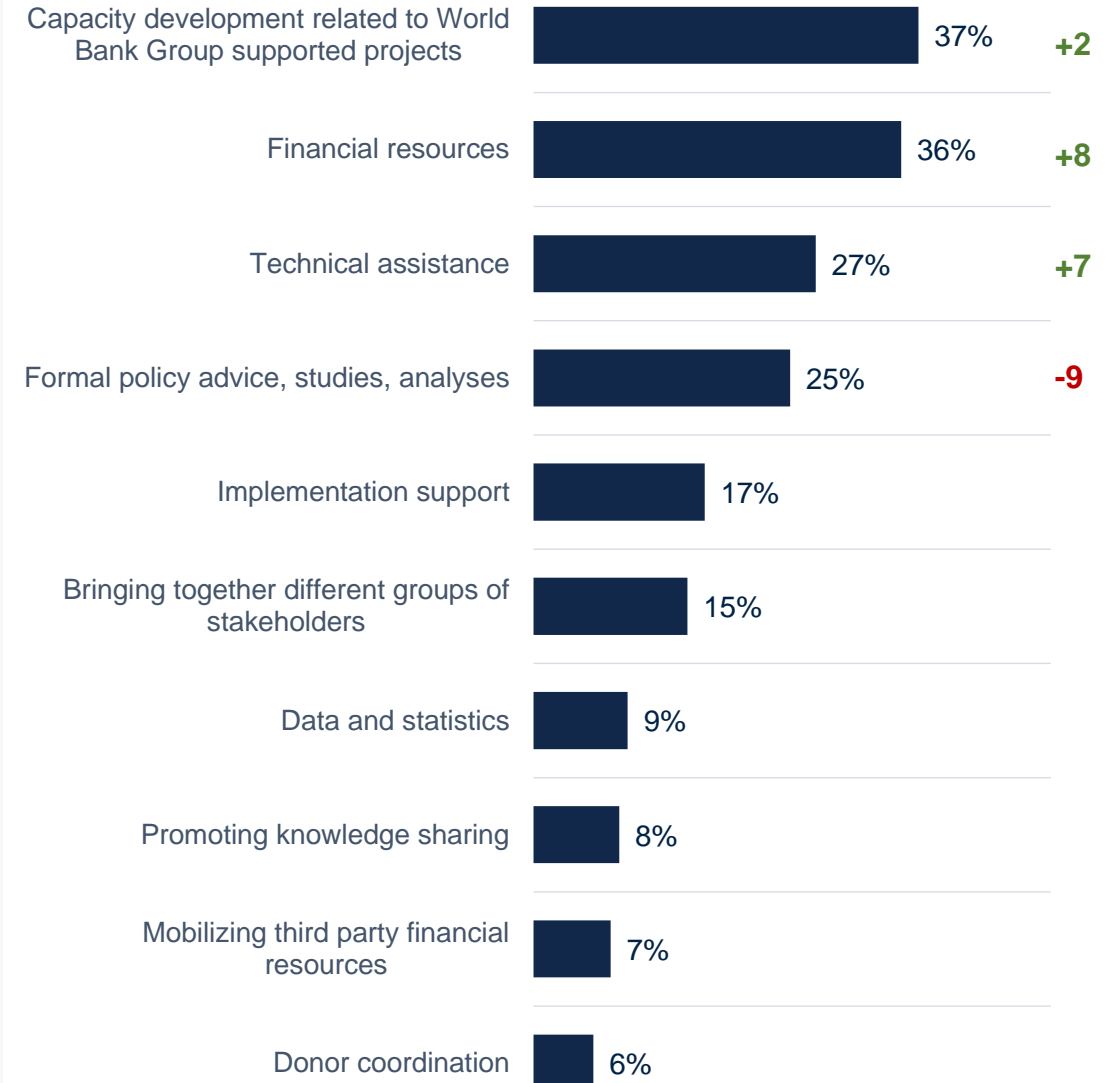
It should be noted that 7 in 10 civil society and academia respondents selected capacity development as the WBG's greatest value, much more than respondents from other stakeholder groups.

In contrast, a majority of respondents from bilateral/multilateral agencies, private sector, ministry employees/PMUs, and high-level government officials considered the WBG's financial resources as its greatest value to Panama.



When thinking about the World Bank Group's role in Panama, which activity do you VALUE the most? (Choose no more than 2) (N=121) % of respondents shown.

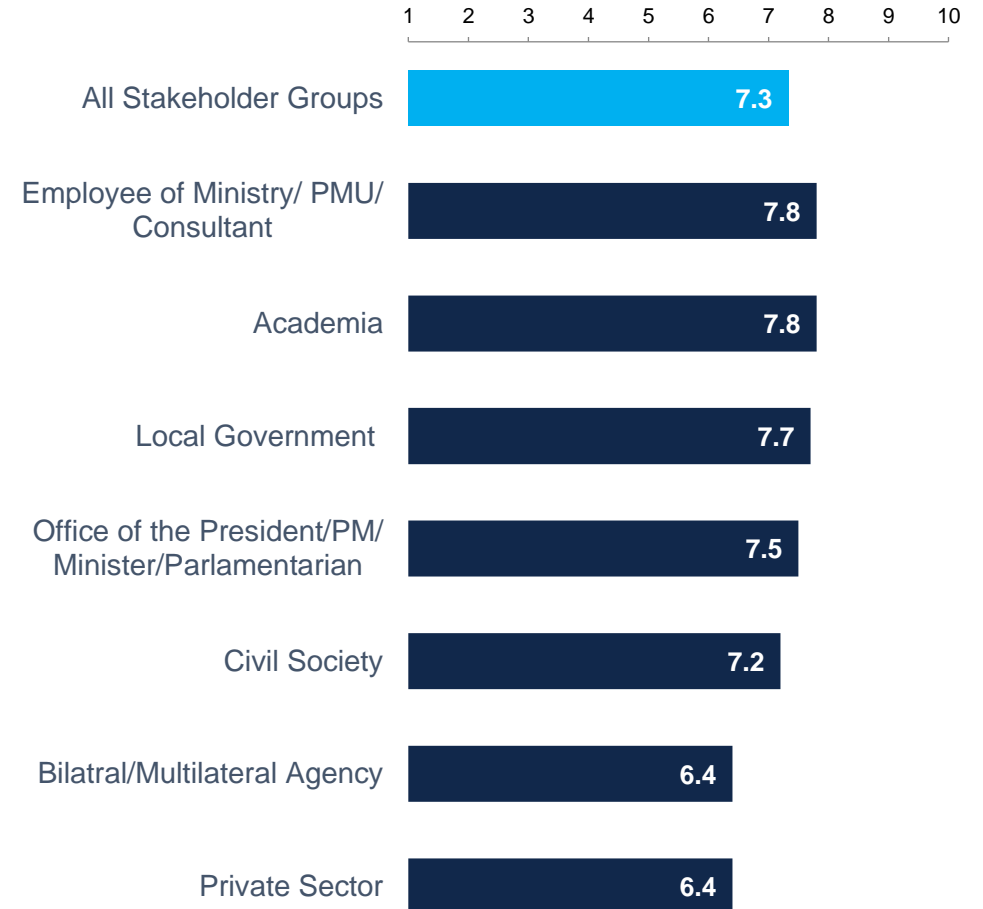
Vs. FY19



Overall Ratings for Indicator Questions

Aggregating across the [twenty-five COS indicator questions](#), respondents across **stakeholder groups** gave **statistically similar** rankings for the WBG in Panama.

Collaboration: Respondents who collaborate with the WBG had significantly higher mean ratings for the aggregated indicator questions (mean rating = 8.3) compared to respondents who do not collaborate with the WBG (mean rating = 7.2).



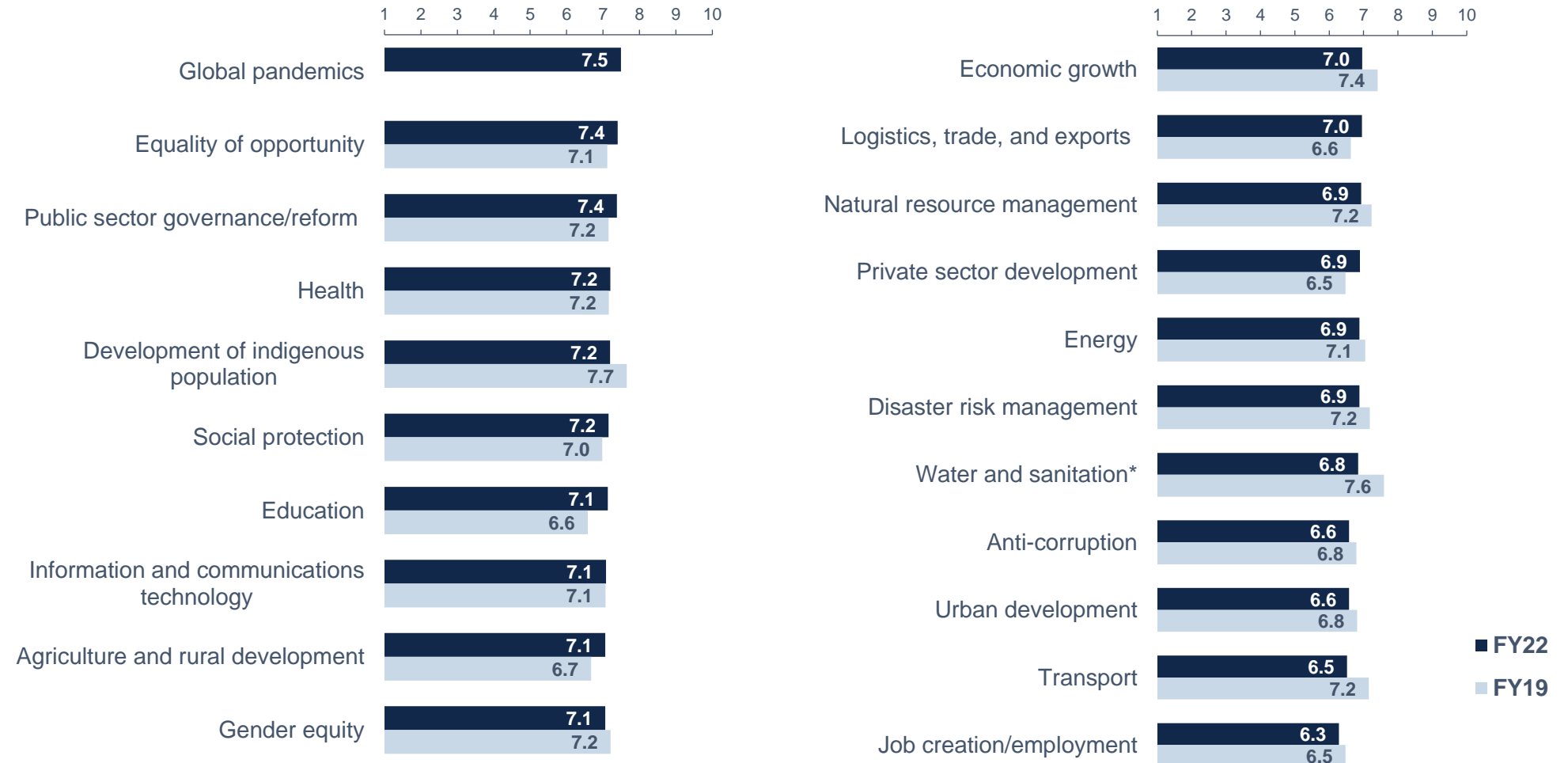


Country Opinion Surveys

World Bank Group's Support in Development Areas

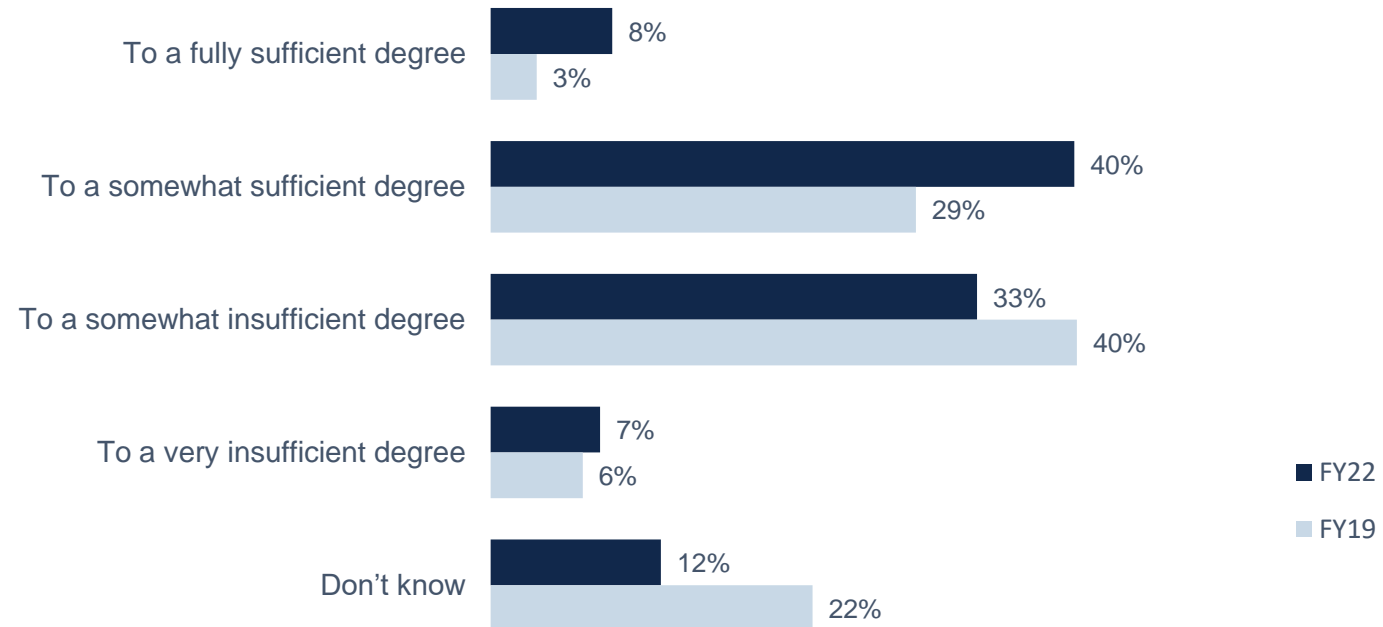
Effectiveness of WBG's Support in Sectoral Areas

The WBG's work in **global pandemics**, **equality of opportunity** and **public sector governance/reform** received the highest ratings of effectiveness. Ratings of the WBG's effectiveness across sectors were statistically similar to those in FY19, except for **water and sanitation**, which was rated significantly lower this year compared to FY19.



WBG Helping the Poorest in Panama

Respondents' perceptions of the WBG's support to the poorest significantly improved compared to FY19. Around half of respondents (48%) agree that WBG's help is either fully sufficient or somewhat sufficient.





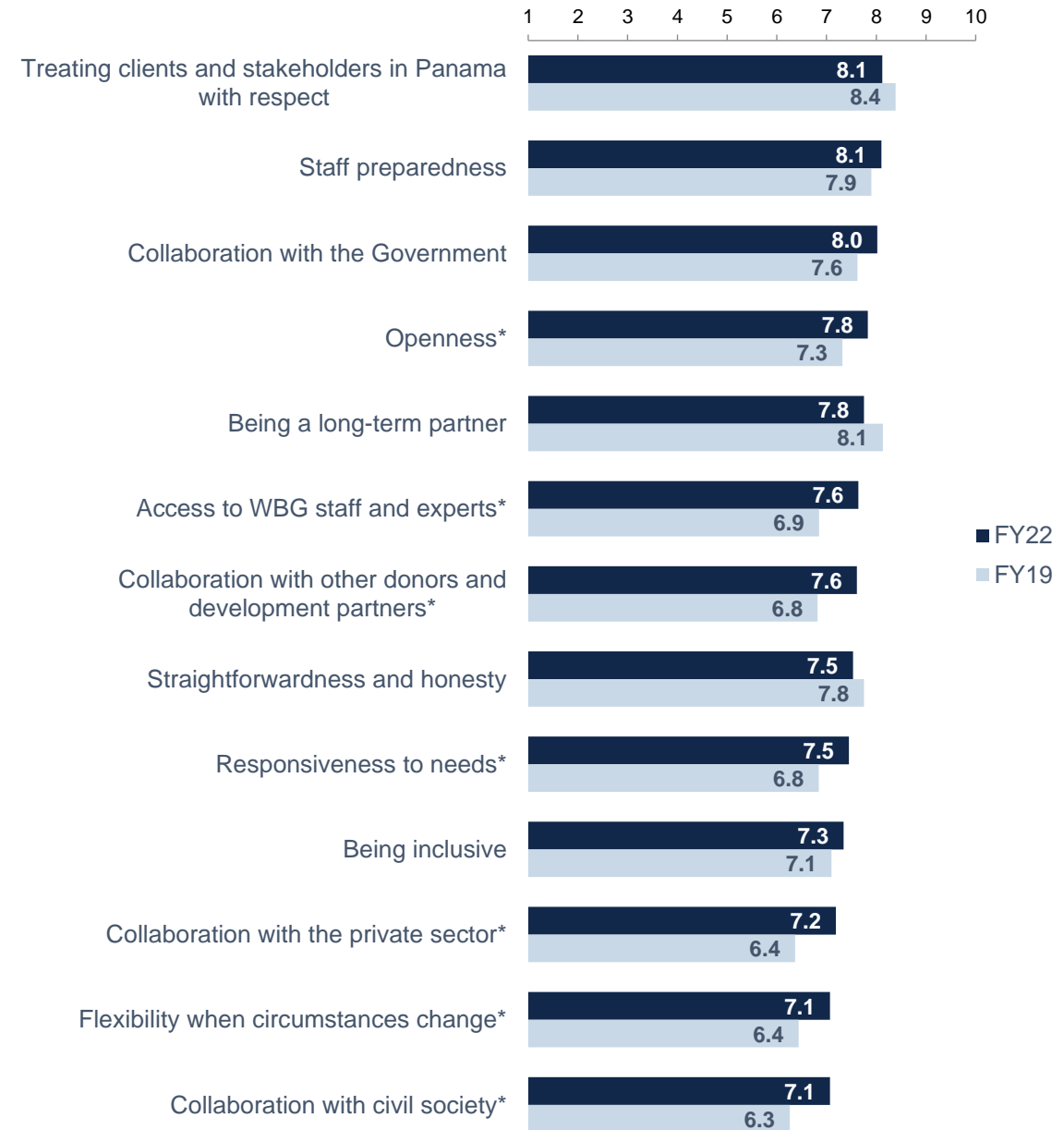
Country Opinion Surveys

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** that **treats clients and stakeholders with respect**, **collaborates with the Government** and **openly shares data and other information**.

Ratings for a number of these aspects of the WBG as a development partner significantly improved compared to the FY19 survey, including openness, access to WBG staff, responsiveness, flexibility, and collaboration with other donors and development partners, the private sector, and civil society.



To what extent is the World Bank Group an effective development partner in Panama, in terms of each of the following? (1: To no degree at all – 10: To a very significant degree). Mean rating shown. *Significantly different between years.

The WBG as a Development Partner

Respondents gave the highest ratings for the WBG **insisting on accountability** and **increasing Panama's institutional capacity**.





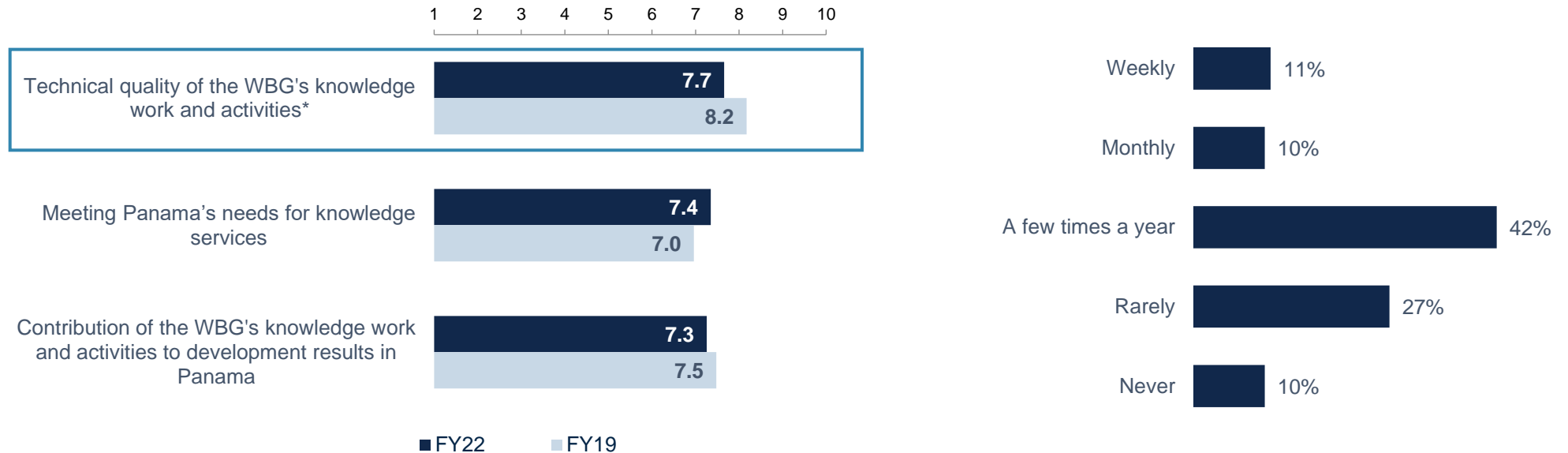
Country Opinion Surveys

World Bank Group's Knowledge Work and Activities

WBG's Knowledge Work: Key Indicators

Respondents gave the highest ratings for the **technical quality** of the WBG's knowledge products; however, ratings in FY22 were significantly lower than in FY19.

The majority of respondents reported consulting WBG knowledge work a few times a year or more often.



The World Bank Group meets Panama's needs for knowledge services (e.g., research, analysis, data, technical assistance) (1: Strongly disagree – 10: Strongly agree). Mean rating shown. Overall, how significant a contribution do you believe the World Bank Group's knowledge work and activities make to development results in your country? (1: Not significant at all– 10: Very significant). Mean rating shown.

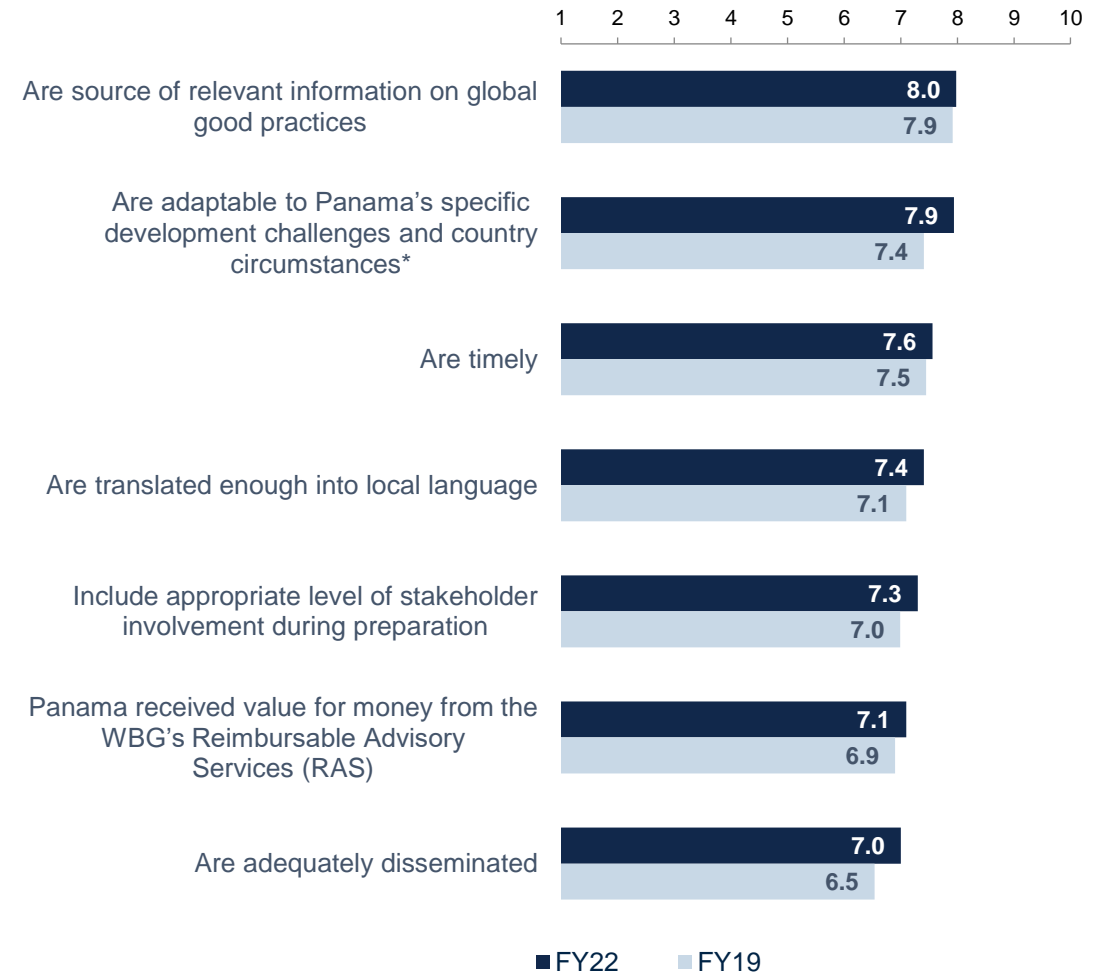
Overall, how would you rate the technical quality of the World Bank Group's knowledge work and activities? (1: Very low technical quality– 10: Very high technical quality). Mean rating shown. Significantly different between years.

How frequently do you consult World Bank Group's knowledge work and activities in the work you do? (N=121). % of respondents shown.

Attributes of the WBG's Knowledge Work

The WBG's knowledge products were most highly rated for being **a source of relevant information on global good practices** and **adaptable to Panama's specific development challenges and country circumstances**.

Ratings for nearly all aspects of the WBG's knowledge work were slightly higher this year than in FY19; however, only being adaptable to Panama's specific development challenges and country circumstances reached statistical significance.





Country Opinion Surveys

The Future Role of the World Bank Group in Panama

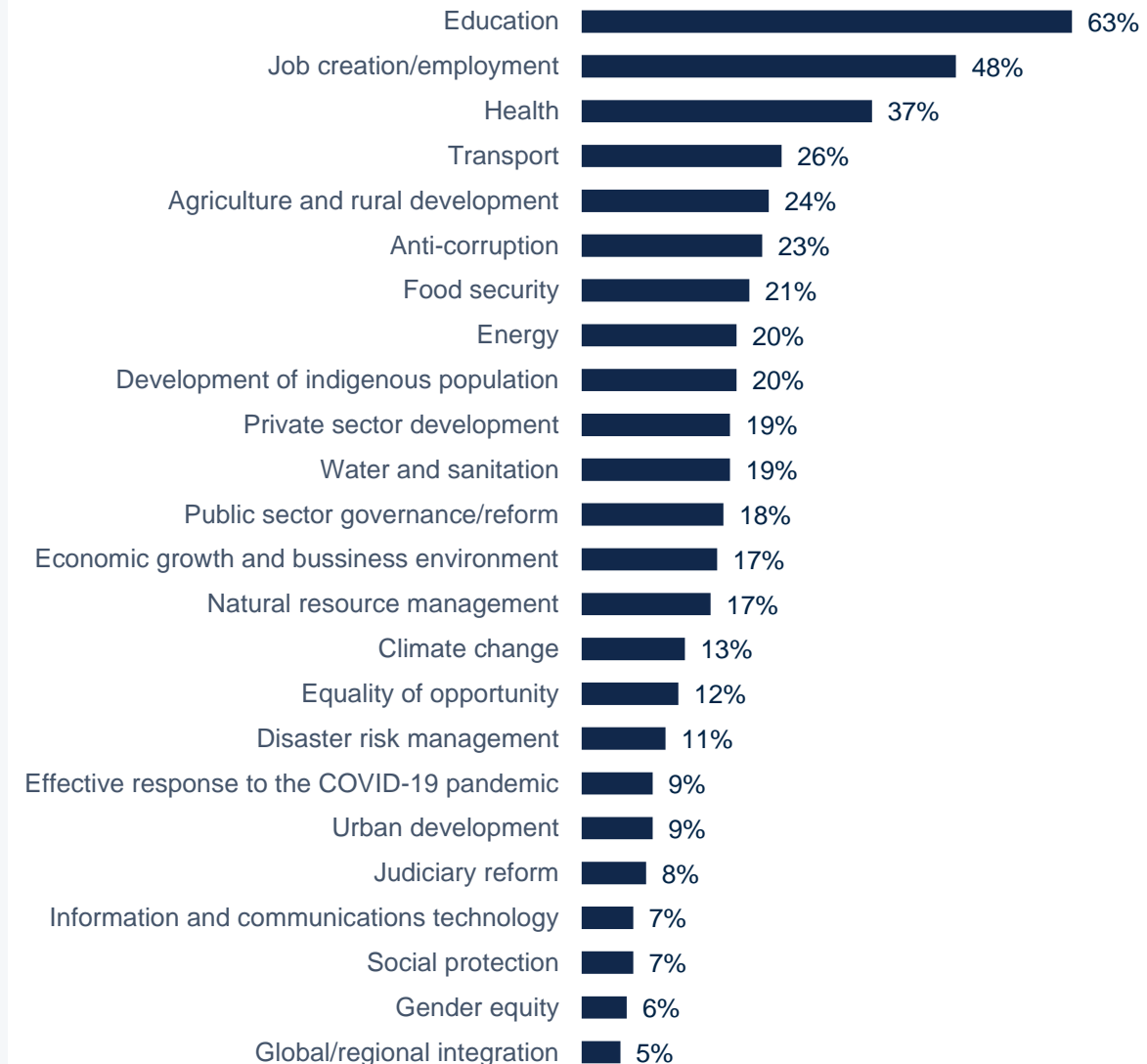
Areas the WBG Should Prioritize with its Resources

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

In FY22, as in FY19, respondents thought the WBG should prioritize **education** in Panama, which was also their top development priority.

Of note, **job creation/employment** and **transport** were of much more priority to respondents this year compared to FY19. Job creation increased by 40 percentage points and transport by 24 percentage points compared to FY19.

It should be noted that there was a change in the methodology for this question: In FY19, respondents could select up to three priorities, while in FY22 they could select up to five.



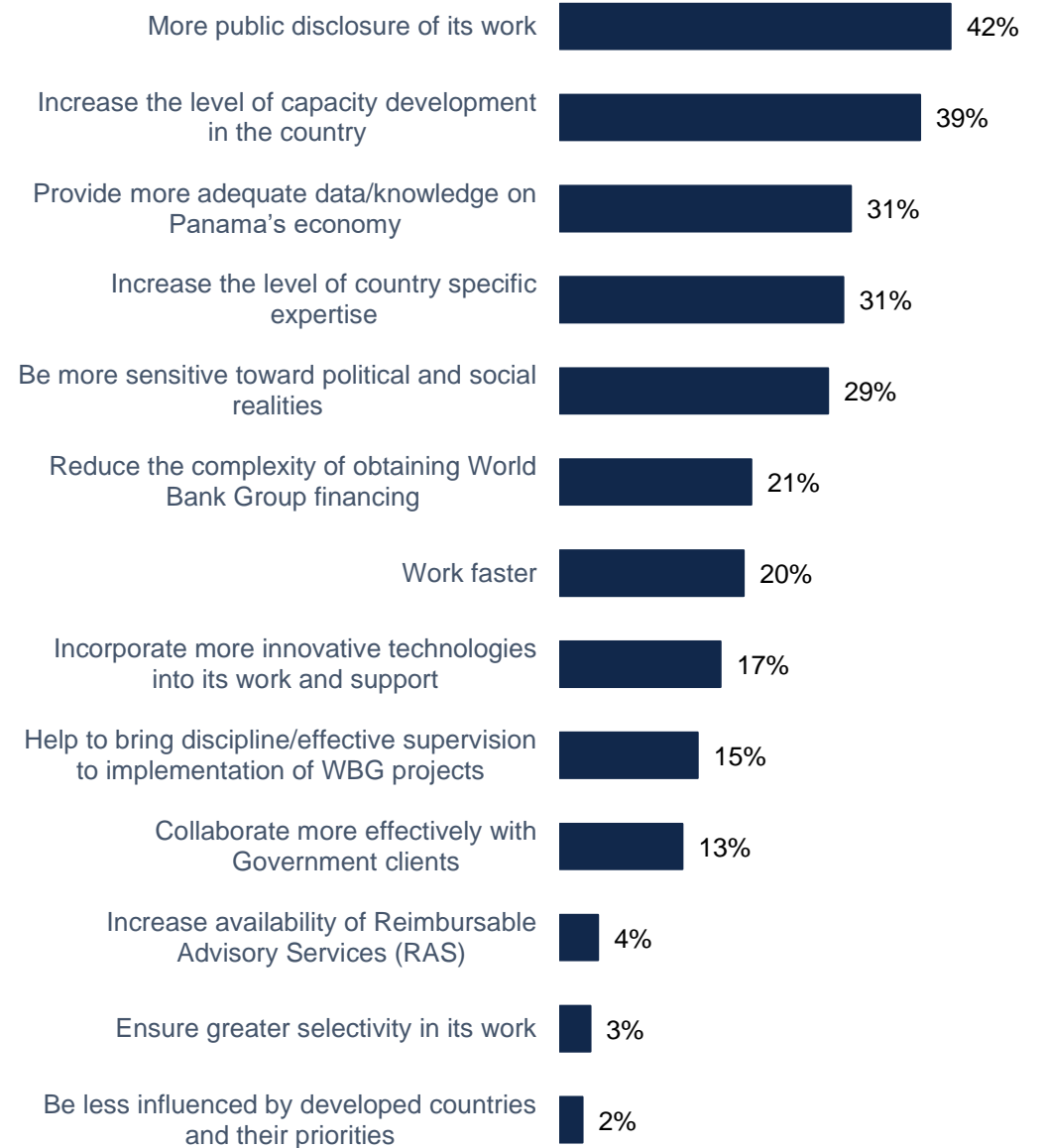
Making the WBG's Advice of Greater Value

Four in ten respondents said that **more public disclosure of WBG work** and increasing **capacity development** in Panama would make the WBG's guidance and advice of greater value. Respondents also said that the WBG should **provide more adequate data/knowledge** on Panama's economy, **increase its country specific expertise**, and **be more sensitive toward the political and social realities** in Panama.

Respondents from academia, private sector, and local government were the most likely to say that the WBG should have more public disclosure of its work.

Employees of Ministries/PMUs/Consultants and respondents from local government were the most likely to say that the WBG should increase the level of capacity development in Panama.

Respondents from civil society were the most likely to say that the WBG should be more sensitive toward political and social realities whereas respondents from bilateral/multilateral agencies were the most likely to say that the WBG should increase its country specific expertise.



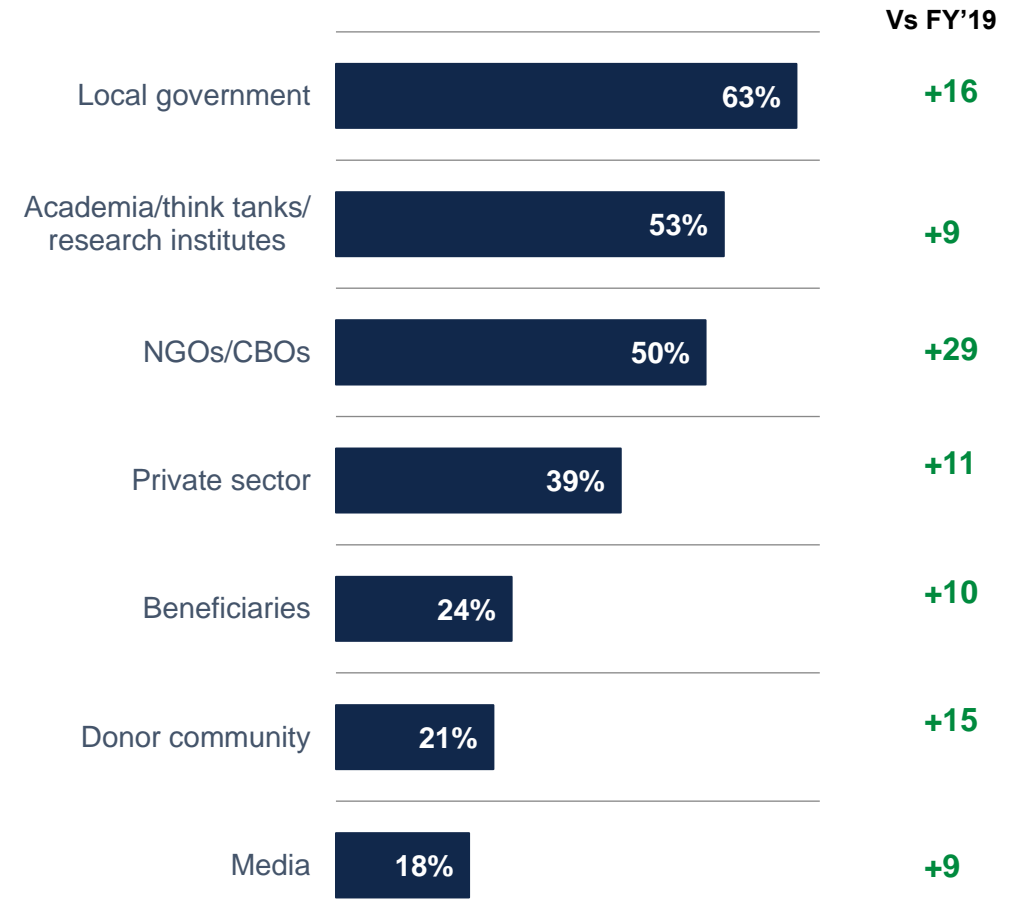
Which of the following SHOULD the WBG do to improve its advice and guidance in Panama? (Choose no more than 3) (N=121). % of respondents shown.

The WBG Should Collaborate More with ...

As in FY19, respondents indicated that the WBG should collaborate more with **local government** and **academia**. This year, respondents increasingly wanted the WBG to collaborate more with **NGOs/CBOs** compared to FY19.

Over half of respondents from Employee of a Ministry/PMU/Consultants group would like to see more collaboration with beneficiaries (56%).

It should be noted that there was a change in the methodology for this question: In FY19, respondents could select up to two groups, while in FY22 they could select up to three.



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) (FY22 N=121). % of respondents shown.



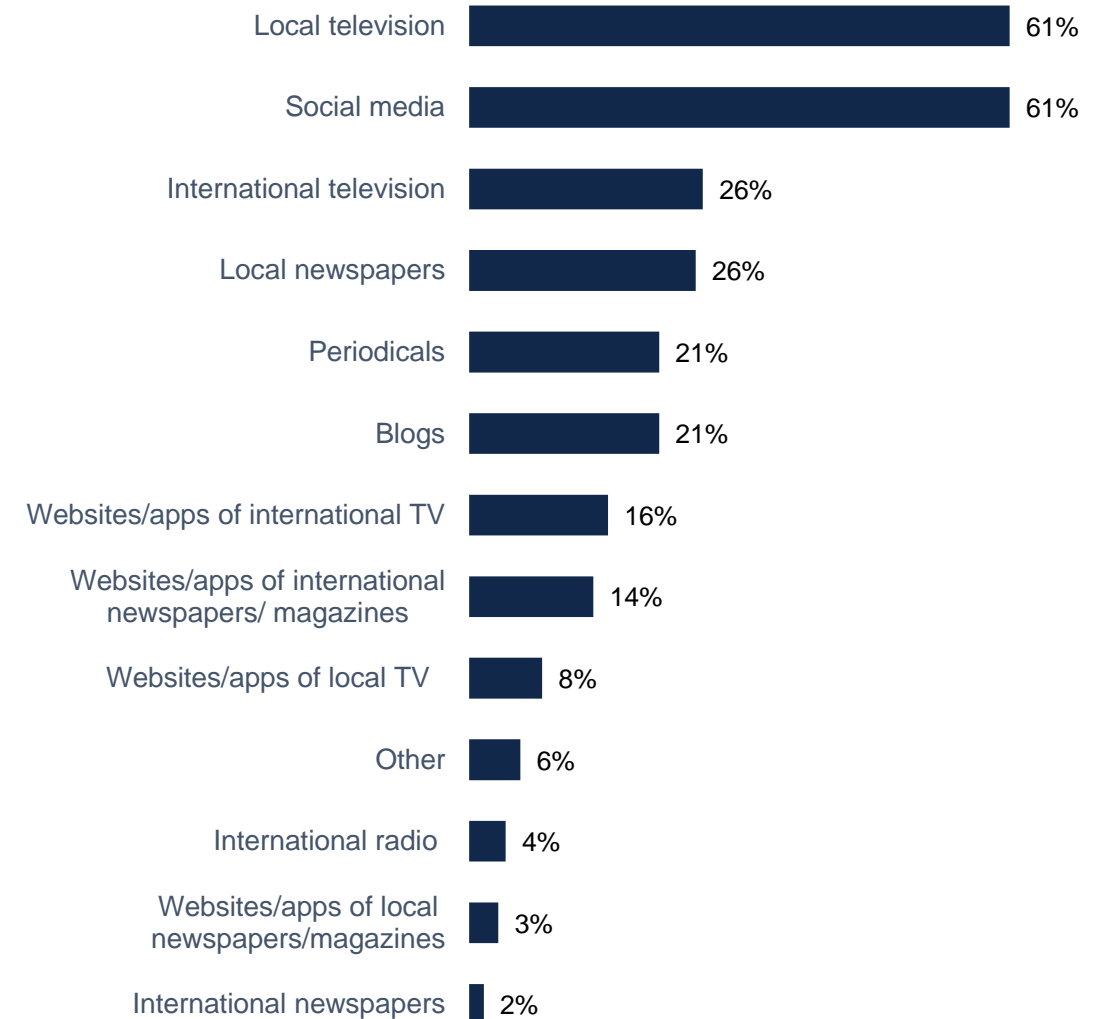
Country Opinion Surveys

Communication and Outreach

Information Sources about Economic and Social Development Issues

A majority of respondents reported using **local television** and **social media**.

High-level government officials, employees of ministries/PMUs/Consultants, local government, and civil society were most likely to utilize local television whereas respondents from bilateral/multilateral agencies, private sector, and civil society were more likely to use social media. Respondents from academia reported using social media and international television equally.



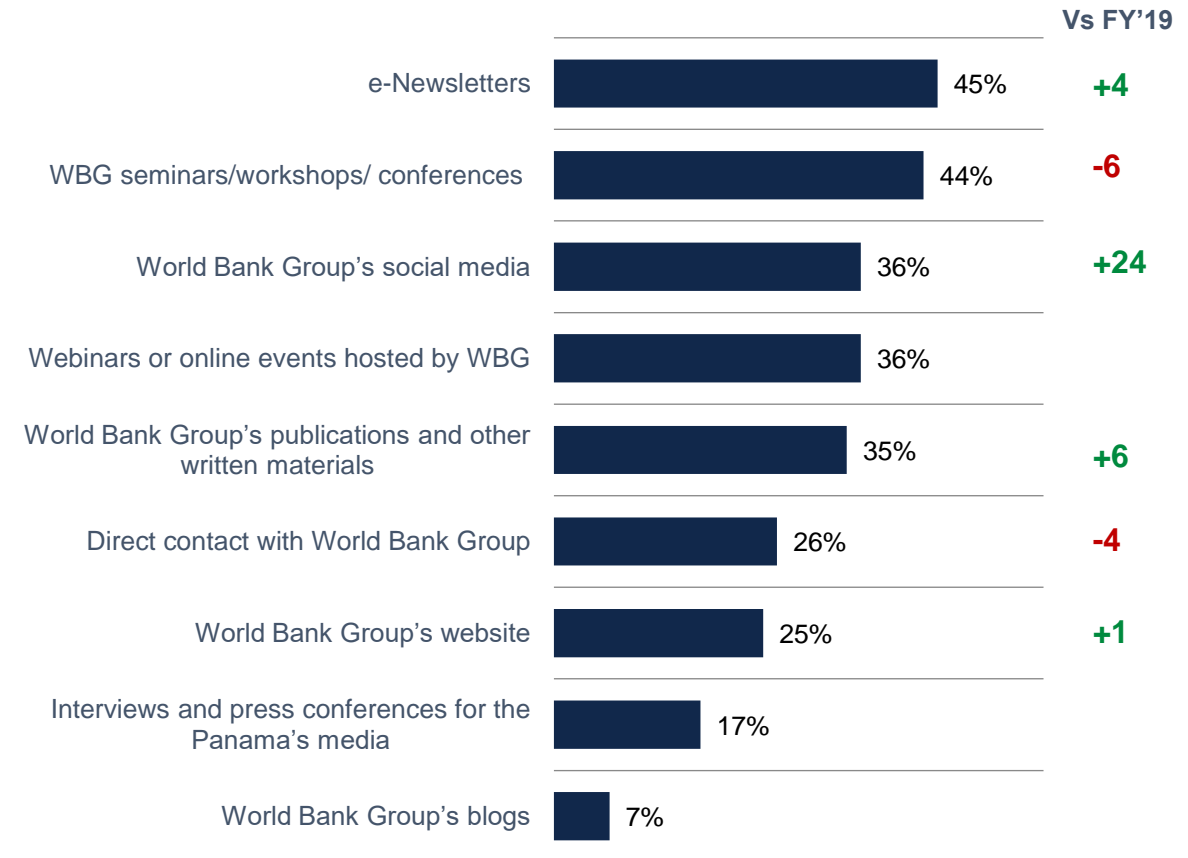
Which would you say are your MAIN sources of news about economic and social development issues in Panama? (Choose no more than 3) (N=121).
% of respondents shown.

Preferred WBG Information Sources

Respondents preferred to obtain information from the WBG from **e-Newsletters** and **WBG seminars/workshops/conferences**.

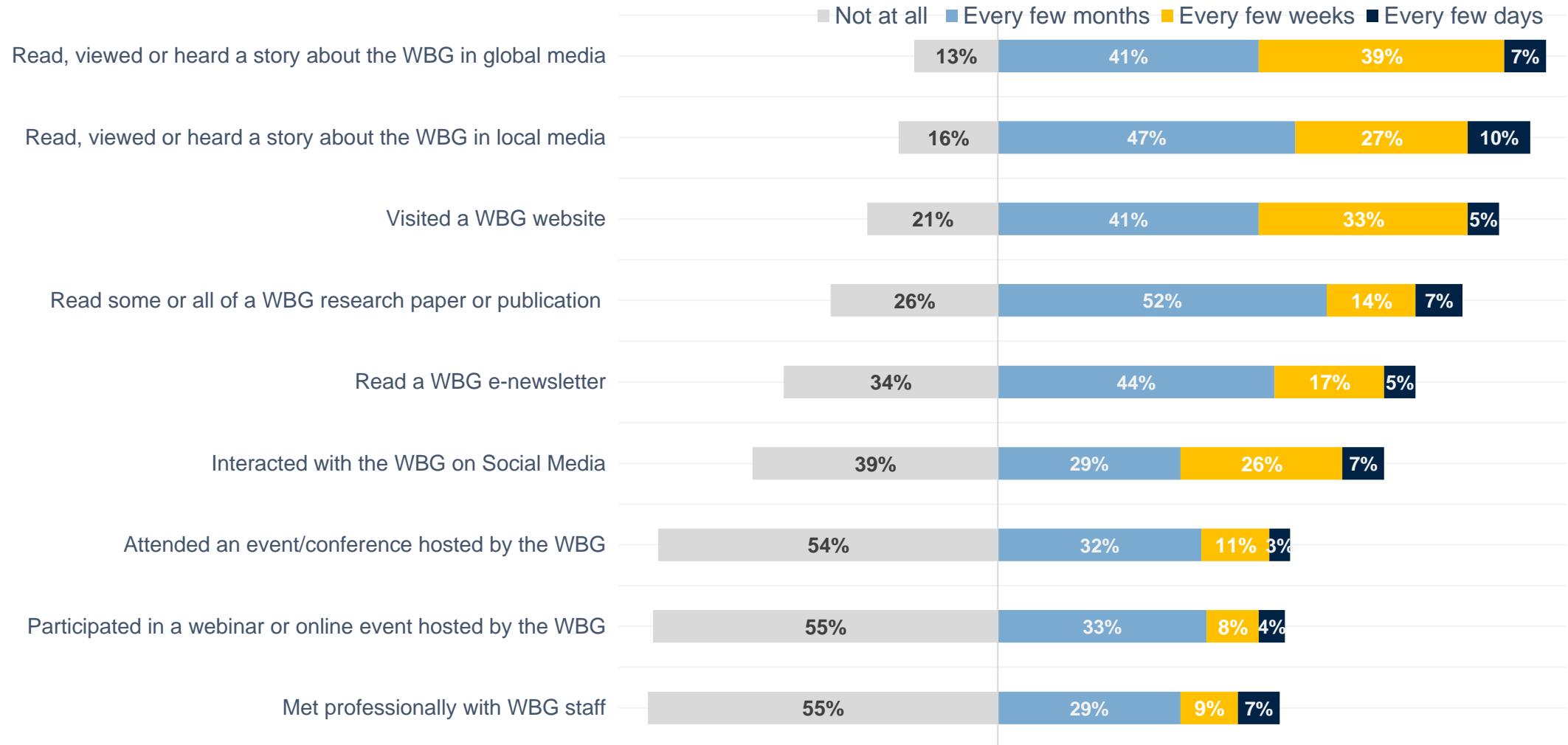
Preference for **WBG social media** was much higher this year compared to FY19. Of note, respondents from private sector, civil society, and bilateral/multilateral agencies were much more likely to prefer WBG social media than respondents from other stakeholder groups.

A majority of respondents from local government preferred **direct contact with WBG**, significantly more than respondents from other stakeholder groups.



Frequency of WBG Engagement

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



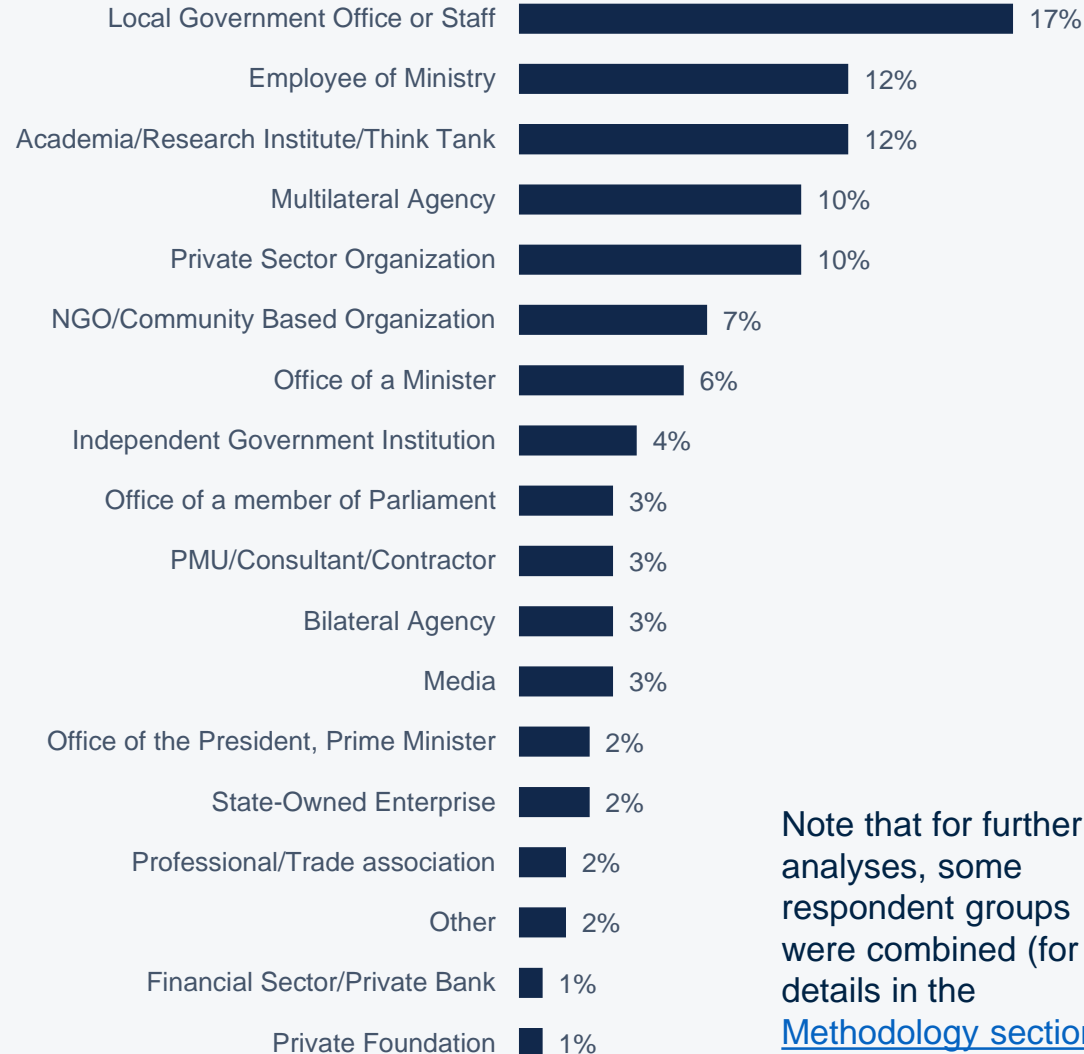


Country Opinion Surveys

Demographics of the Sample

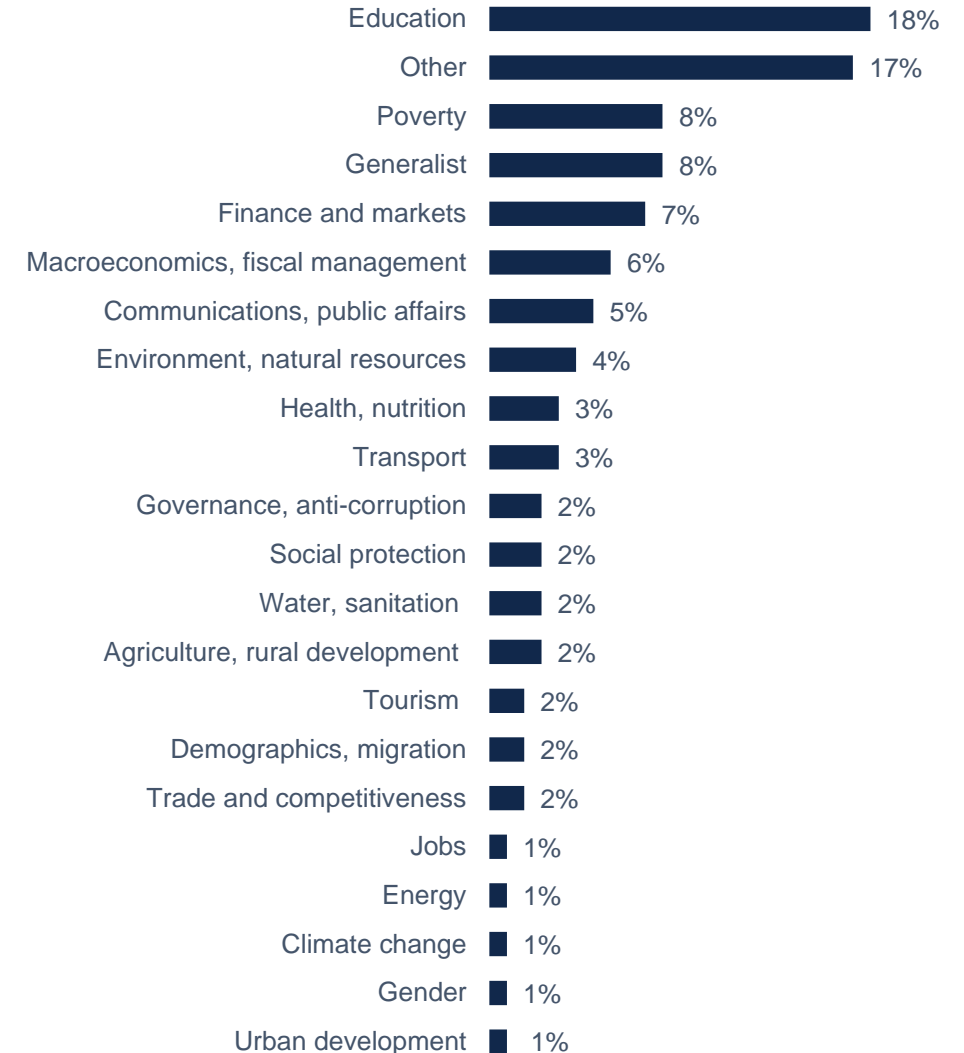
Respondent Profile: Affiliation and Specialization

Current Affiliation



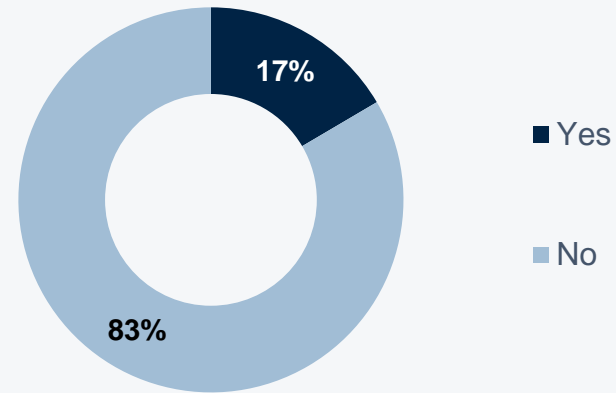
Note that for further analyses, some respondent groups were combined (for details in the [Methodology section](#)).

Specialization

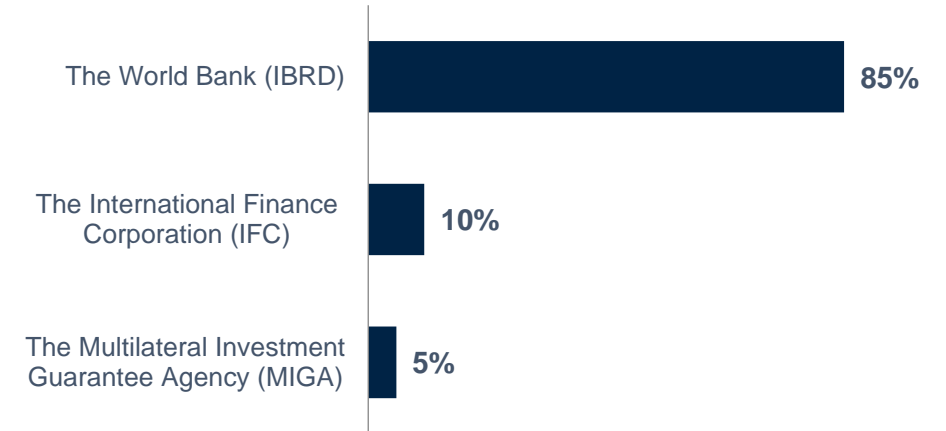


Respondent Profile: Collaboration with the WBG

Collaboration with the WBG

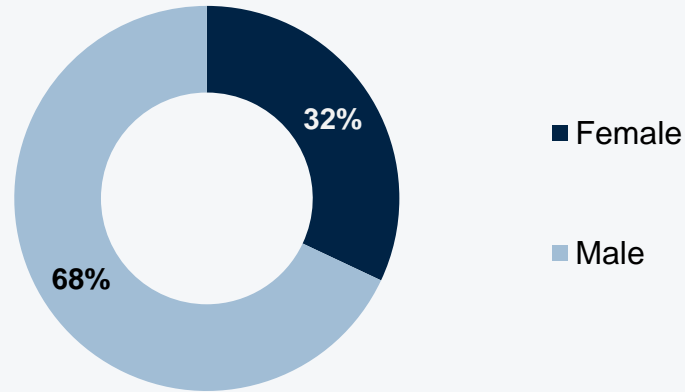


Collaboration Institution

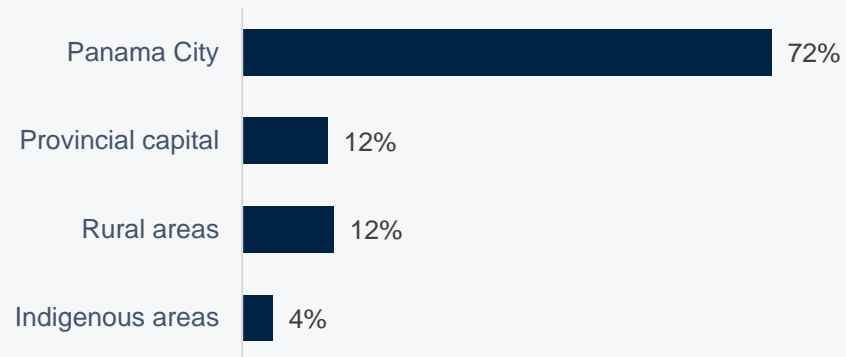


Respondent Profile: Demographics

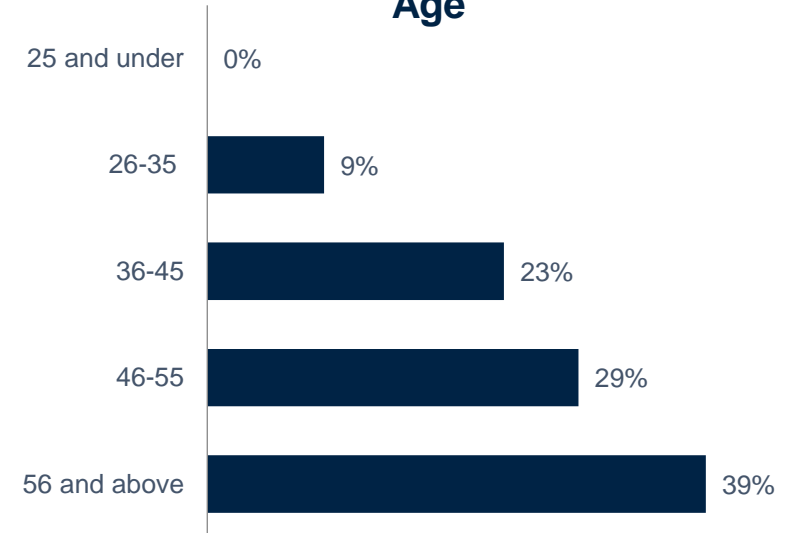
Gender



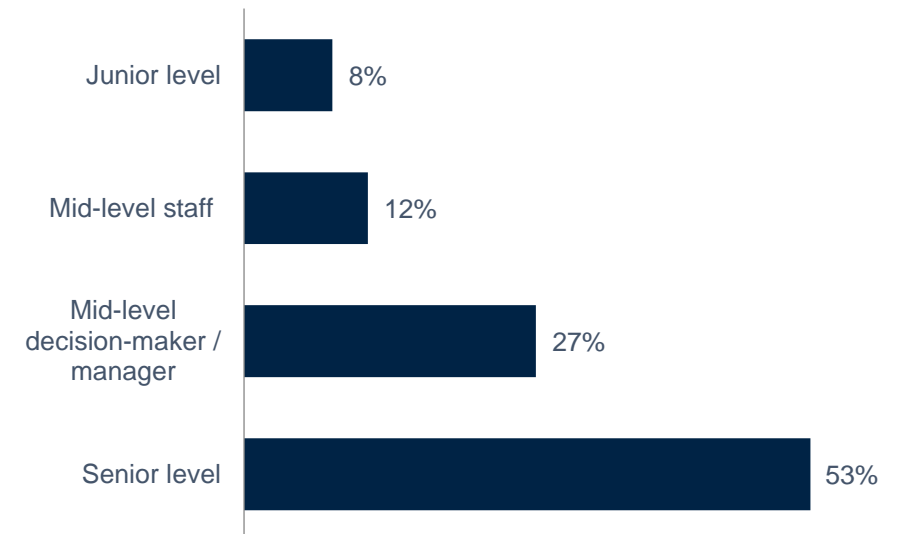
Location



Age



Level within organization



What's your gender? (N=121)
 What's your age (N=121)
 Which best represents your geographic location? (N=121)
 Within your organization, would you describe yourself as ... ? (N=121)



Country Opinion Surveys

Methodology

Methodology

From June 2022 to October 2022, stakeholders of the WBG in Panama were invited to provide their opinions on the WBG's work in the country by participating in a Country Opinion Survey. A total of 1,030 stakeholders were asked to participate, drawn from the Office of the President, Prime Minister, a Minister, or a member of Parliament/Legislative body; ministries, ministerial departments, or implementation agencies; project management units (PMUs) overseeing implementation of WBG projects or consultants and contractors working on WBG-supported projects and programs; local governments; independent government institutions; the judiciary; 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; academia, research institutes, or think tanks; and the media.

A total of 121 stakeholders participated in the survey (12% response rate). Respondents completed the questionnaire via the fielding agency's online platform.

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 FY19 (response rate was 12%, N=138).

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 FY19 and FY22 Country Surveys used in the year comparisons analyses are listed in the table on the right. This year's survey saw increased outreach and responding from high-level government officials and local government, but less responding from media and government institutions. 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	FY19	FY22
High-level government offices: Office of the President, Office of Prime Minister, Office of a Minister, Office of a member of Parliament / legislative body	2%	12%
Government Institutions: employees of ministries, PMUs, consultants on WBG-supported projects, independent government institutions, the judiciary, and state-owned enterprises	38%	21%
Local Government	6%	17%
Bilateral/Multilateral Agency: embassy, diplomatic, military, UN, regional development bank	15%	13%
Civil Society Organizations (CSO): NGOs/community-based organizations, private foundations, professional/trade associations	7%	9%
Private Sector: private sector organizations and financial sector/ private banks	17%	11%
Academia/Research Institute/Think Tank	7%	12%
Media	6%	3%
Other	2%	2%
Total Number of Respondents	121	135

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 defined as $p\text{-value} < .05$

Groups	n	%
Office of the President, Prime Minister/ Minister / Parliamentarian: includes respondents from the three high-level government offices	14	12%
Employee of a Ministry: includes employees of ministries and respondents from project management units (PMUs) / consultants on WBG-supported projects	18	15%
Local government	21	17%
Bilateral/Multilateral Agency	16	13%
Private Sector: includes private sector organizations and financial sector/private banks	13	11%
Civil Society: includes NGOs/community-based organizations, professional/trade associations, private foundations	11	9%
Academia/Research Institute/Think Tank	14	12%
Other: includes respondents from independent government institutions, state-owned enterprises, the media and other groups	14	12%
Total	121	100%

Indicator questions

A5_4. To what extent do you trust the World Bank Group to do what is right? (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 Panama (1: Strongly disagree – 10: Strongly agree)

B3. The World Bank Group's work is aligned with what I consider the development priorities for Panama (1: Strongly disagree – 10: Strongly agree)

B4_1. Overall, please rate your impression of the effectiveness of these organizations in Panama. 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 Panama? (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 Panama? (1: To no degree at all– 10: To a very significant degree)

C2:C13. To what extent is the World Bank Group an effective development partner in Panama, 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 Panama with respect, Openness (sharing data and other information), **Collaboration with other donors and development partners** (1: To no degree at all – 10: To a very significant degree)

C14. To what extent do you agree/disagree with the following statement? – The World Bank Group takes decisions quickly in Panama (1: Strongly disagree – 10: Strongly agree)

C22:C23. To what extent do you agree/disagree with the following statements about the World Bank Group in Panama? – The World Bank Group's financial instruments (i.e., investment lending, Development Policy Loan, Trust Funds, etc.) meet the needs of Panama, The World Bank Group meets Panama's needs for knowledge services (e.g., research, analysis, data, technical assistance) (1: Strongly disagree – 10: Strongly agree)

E7. In Panama, to what extent do you believe that the World Bank Group's knowledge work and activities: Are adaptable to Panama's specific development challenges and country circumstances (1: To no degree at all– 10: To a very significant degree)

E8. Overall, how significant a contribution do you believe the World Bank Group's knowledge work and activities make to development results in your country? (1: Not significant at all – 10: Very significant)

E9. Overall, how would you rate the technical quality of the World Bank Group's knowledge work and activities? (1: Very low technical quality – 10: Very high technical quality)

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