

March 2023



Country Opinion Surveys

# FY 2023 Armenia Country Opinion Survey Report

ECR Business Intelligence Team



WORLD BANK GROUP

# Acknowledgements

The Armenia 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 Armenia 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 Armenia'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?
7. What key topics the WBG communicates around do stakeholders recall? Is there a relationship between message recall and views of the WBG's work?

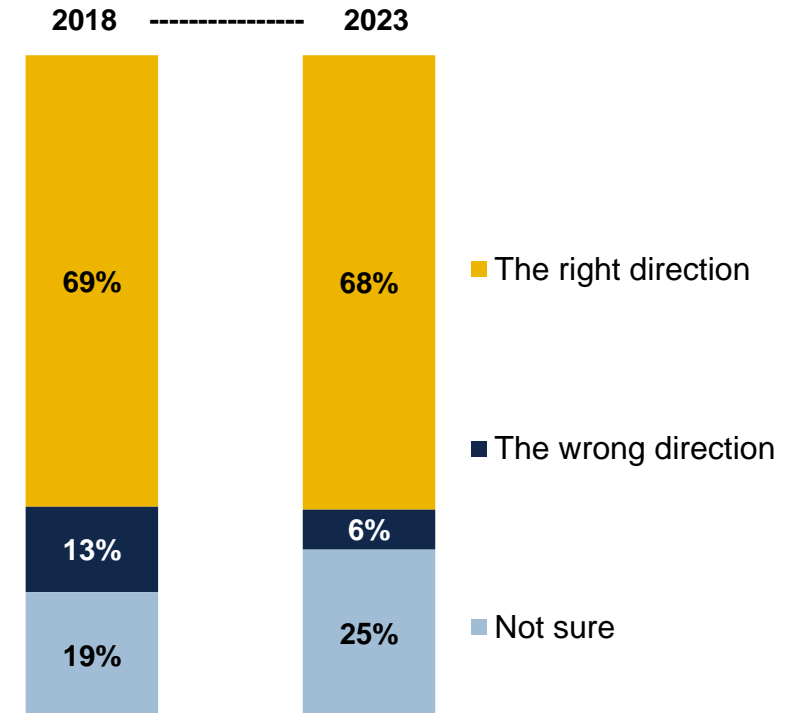
# Overall Context

# Majority of respondents think Armenia is headed in the right direction

Respondents in Armenia continue to be rather optimistic about their country's general direction: **68%** of them say Armenia is headed in the right direction.

Respondents from the **private sector** are the least optimistic: only 29% of them say the country is headed in the right direction, while the majority - 47% - are not sure. Similarly, over 50% of the civil society respondents are not sure about the country's direction.

## Country direction





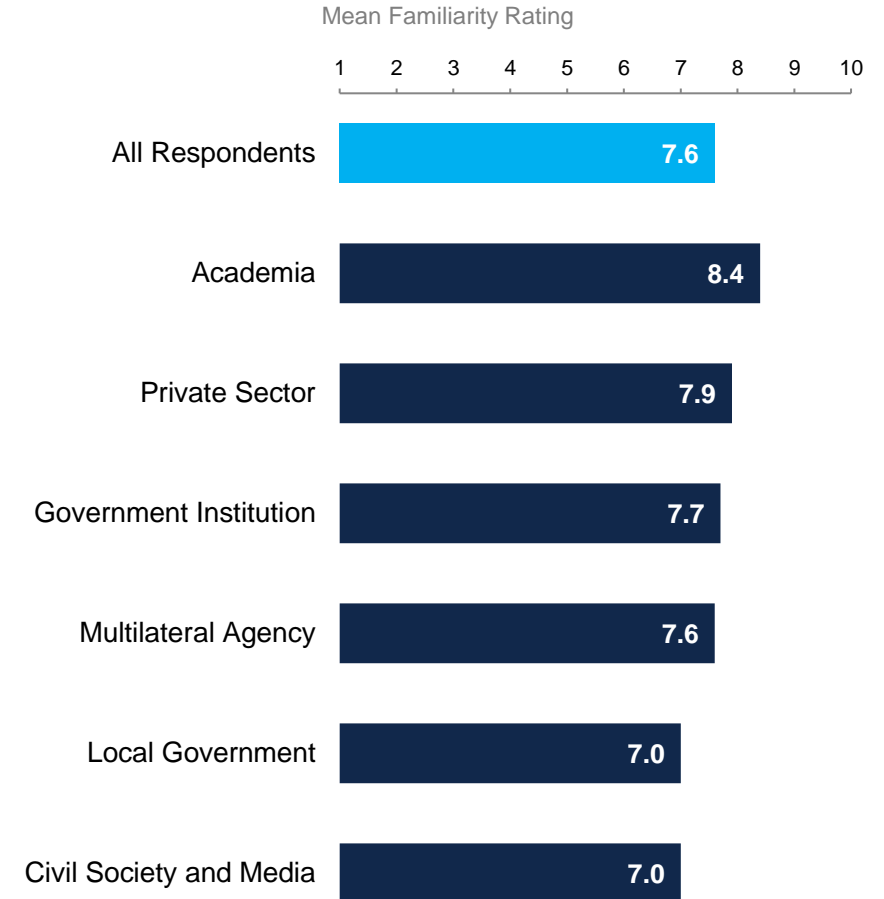
# Familiarity with the World Bank Group

**Year comparison:** Respondents in this year's Country Survey report similar levels of familiarity with the World Bank Group as in FY18:

Mean familiarity: FY23 = **7.6**;  
FY18 = **7.6**.

**Collaboration:** Respondents who collaborate with the WBG and those who don't collaborate report statistically similar levels of familiarity with the institution's work :

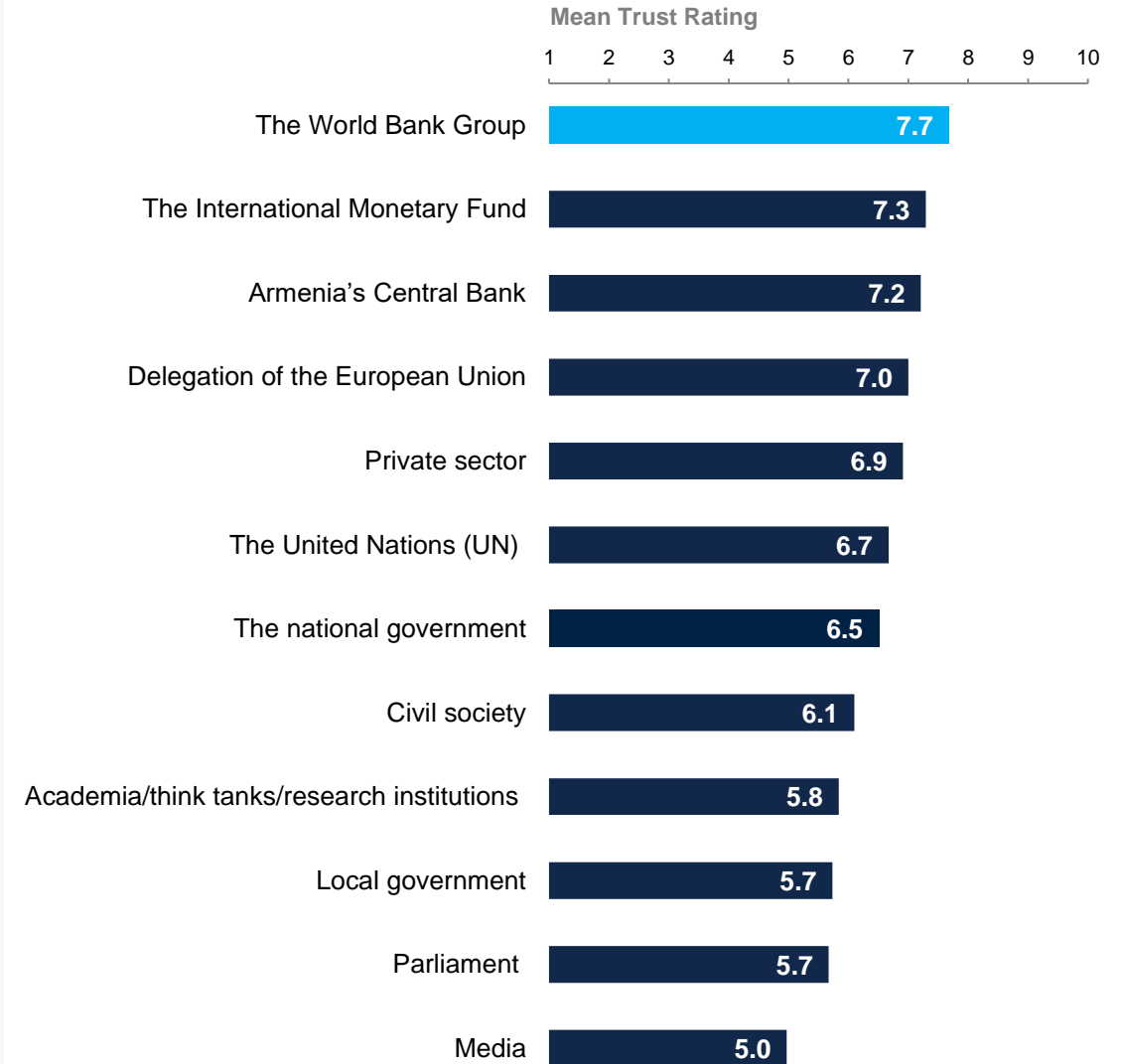
Mean familiarity: WBG collaborators = **7.7**  
Non-collaborators = **7.2**



# Trust in Institutions

The WBG, along with the IMF and Armenia's Central Bank, are the most trusted institutions in Armenia among those studied.

Media, Parliament and the Local Government are the least trusted institutions, according to the respondents.



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)






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

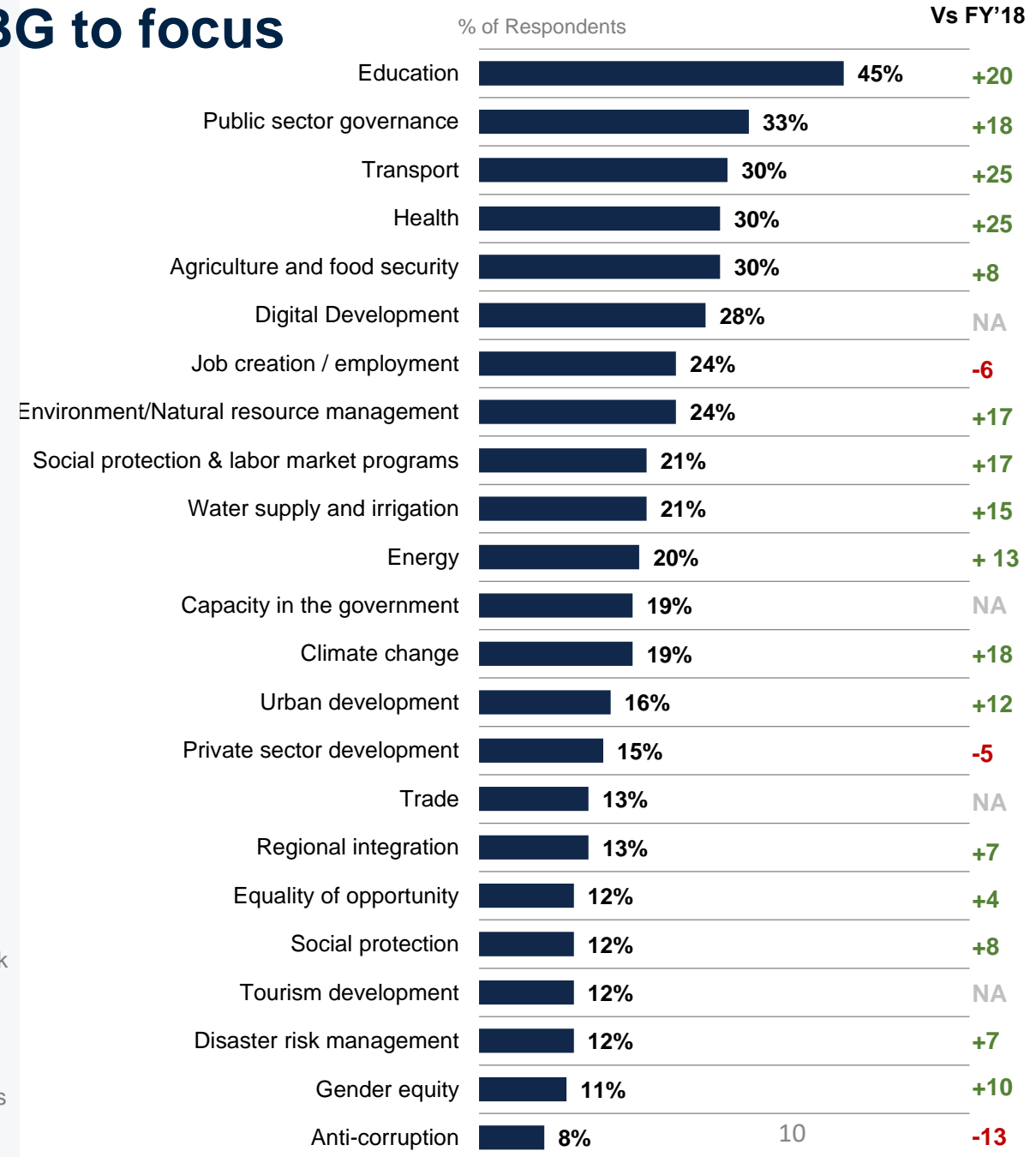
# Development areas for the WBG to focus

**Education** and **Public sector governance** are the top areas in FY23 where stakeholders would like the WBG to focus its resources. Both increased in priority since FY18. Considering that 19% also selected “Capacity in the government”, public sector development is in high priority in Armenia, particularly among stakeholders outside the government: thus, stakeholders from the private sector were most likely to select governance as an area of the WBG’s focus (65%).

Several areas – **Transport, Health, Climate Change, Environment / Natural resource management, and Social protection** have increased in priority in FY23, from just under 10% in FY18. Climate Change grew most notably - from 1% in FY18 to 19% in FY23, and across all stakeholder groups, except for the private sector.

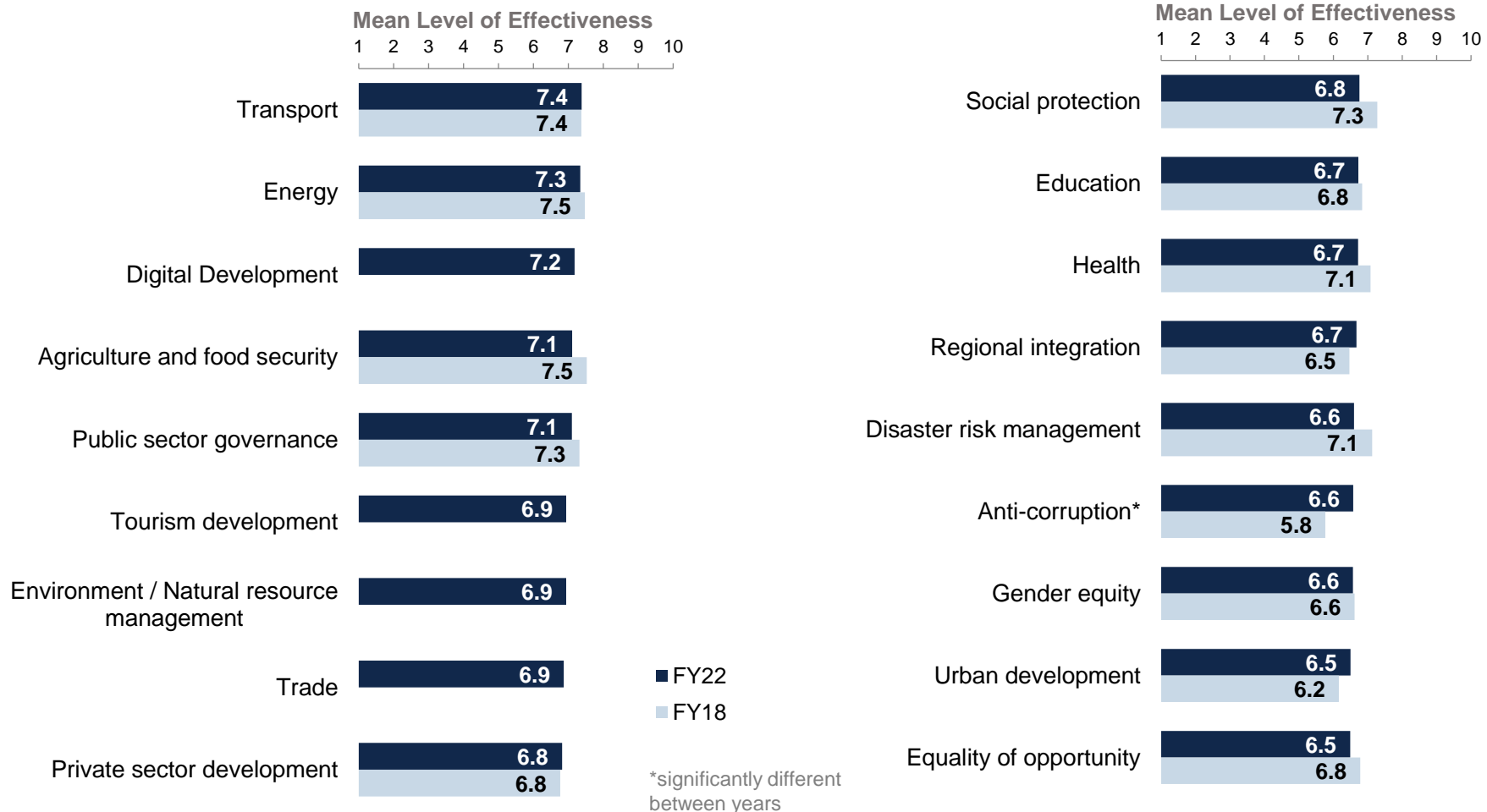
**IMPORTANT NOTE:** The overall increase in percentages in the chart is partially attributable to the change in the methodology: In FY’ 18, respondents were offered to select up to three priorities, while in FY’ 23 – up to five. In addition, two big cross-cutting areas – Economic Growth and Poverty Reduction (#1 and #4 in FY18) – were removed from the list of options in FY23.

 FY23: Which areas should the World Bank Group prioritize in its work in Armenia to have the most impact on development results in the country? (Choose no more than 5) (N=112)  
FY18: When thinking about how the World Bank Group can have the most impact on development results in Armenia, in which sectors do you believe the World Bank Group should focus most of its resources (financial and knowledge services) in Armenia? (Choose no more than THREE) (N=165)



# Effectiveness of WBG's Support in Sectoral Areas

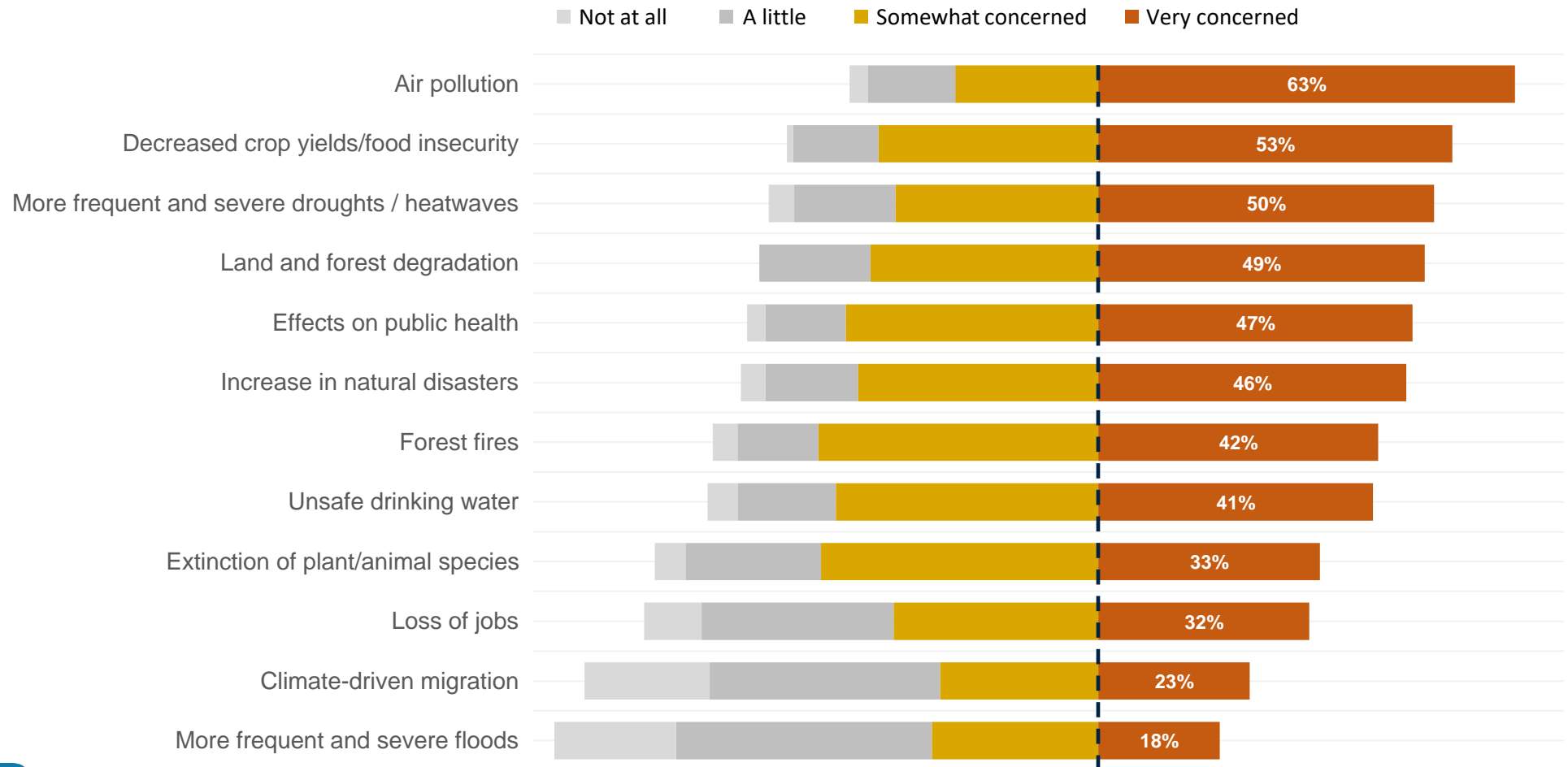
The WBG's work in **transport** and **energy** sectoral areas received the highest ratings of effectiveness. Ratings of the WBG's effectiveness across most sectors were similar to those in FY18, except for **anti-corruption**, which was rated significantly higher this year compared to FY18.



How EFFECTIVE do you believe the World Bank Group is in terms of the work it does in the following areas of development in Armenia?  
(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)

# Pollution is the main concern for respondents in relation to Climate Change

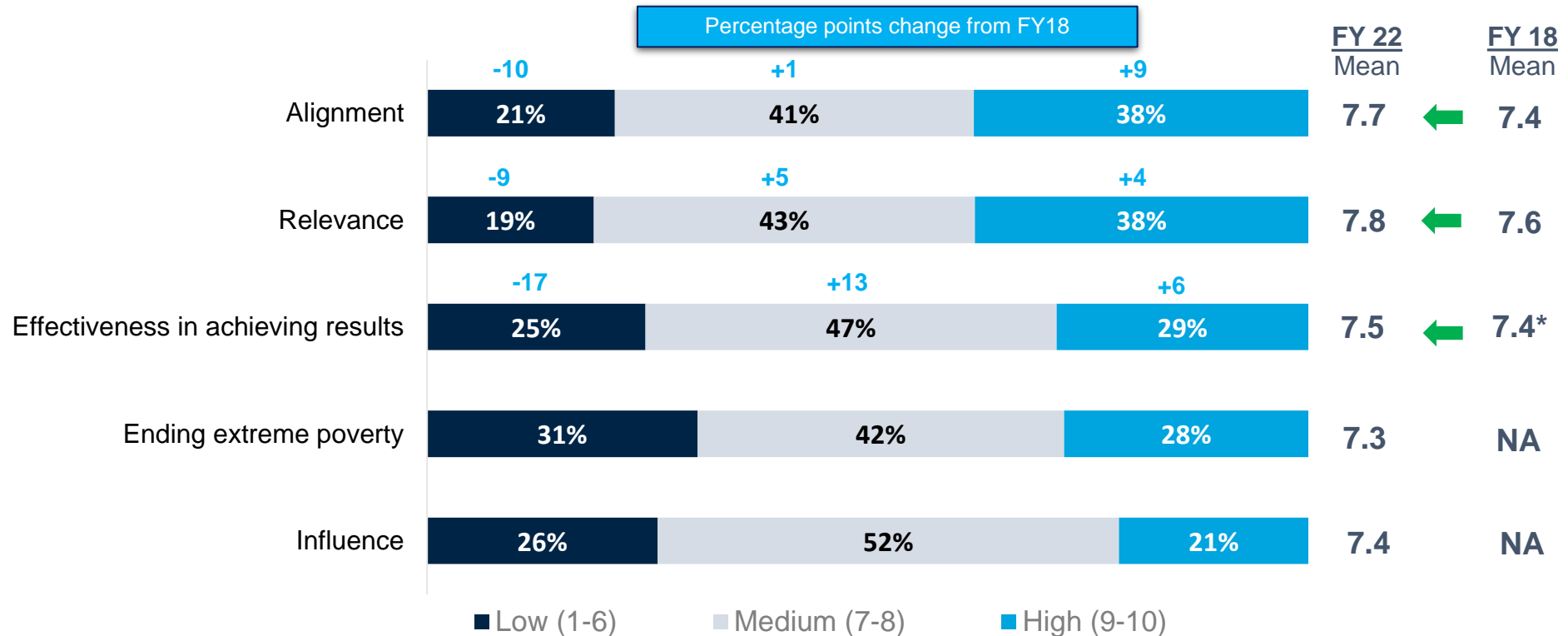
Around two-thirds of the respondents are very concerned about **air pollution** when it comes to the potential impacts of climate change in Armenia. Just over half are very concerned about **decreasing crop yields and droughts** and associated **food insecurity**. Climate-driven migration and floods are the two potential impacts that respondents worry about the least.



# Overall Attitudes toward the World Bank Group

# Key Performance Indicators

In FY23, there was a slight, non-significant improvement across the key indicator questions. Over one-third of respondents gave the WBG high ratings (9 or 10 on a 10-point scale) on **alignment with Armenia's development priorities** and on **relevance**, and just under 30% of respondents gave high ratings for the WBG's **effectiveness in achieving development results** and for its contribution to **ending extreme poverty** in Armenia. Only two in ten ranked highly the institution's ability to **influence** the development agenda in the country.

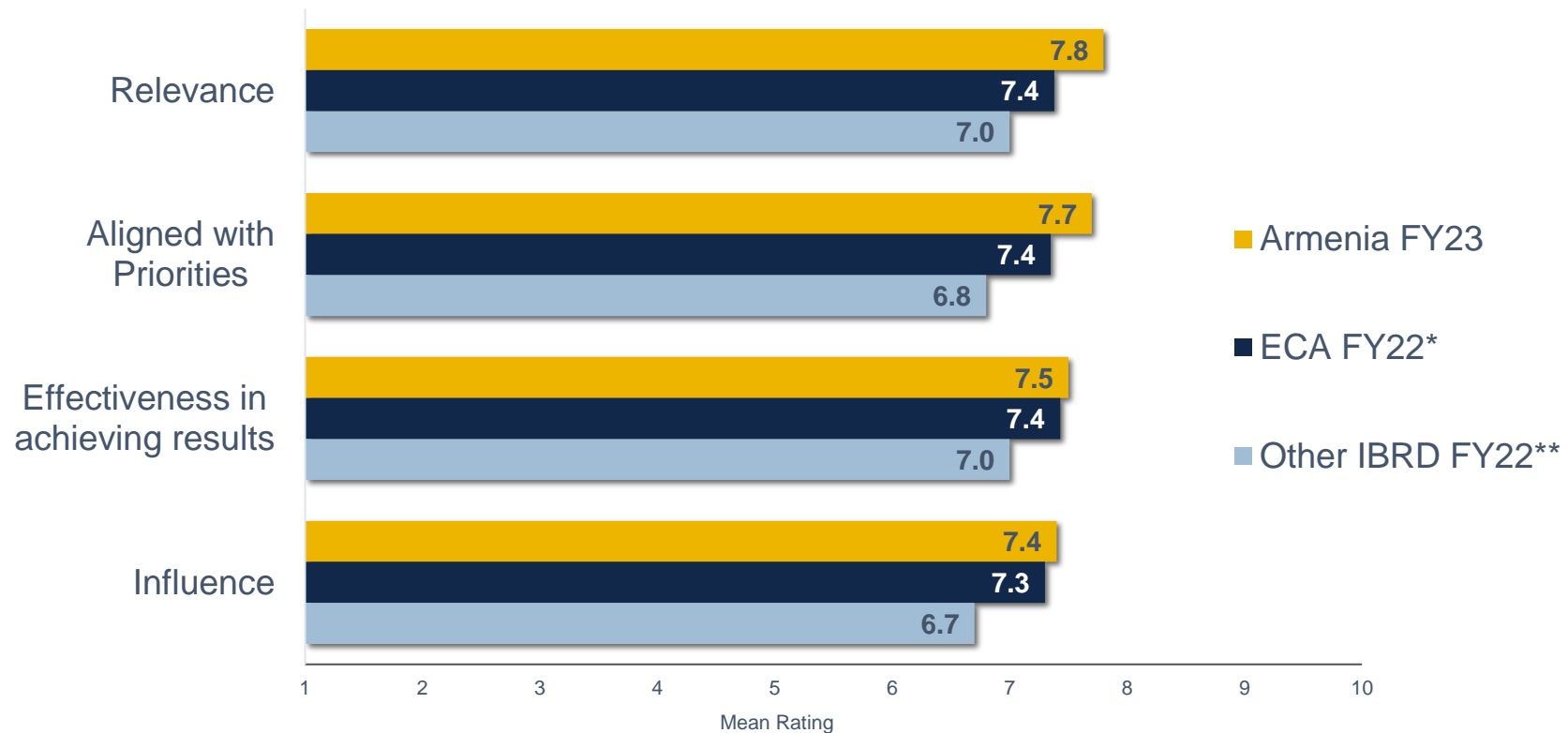


The World Bank Group's work is aligned with what I consider the development priorities for Armenia, Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)  
 How effective has the World Bank Group been in achieving development results in Armenia? Scale: 1-10 (1: Not effective at all– 10: Very effective)  
 To what extent does the World Bank Group influence the development agenda in Armenia? Scale: 1-10 (1: To no degree at all– 10: To a very significant degree)  
 To what extent do you agree/disagree with the following statements about the World Bank Group's work in Armenia?: Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)  
 The World Bank Group currently plays a relevant role in development in Armenia.  
 The World Bank Group's work is well aligned with what I consider the development priorities for Armenia.  
 The World Bank Group's work helps end extreme poverty in Armenia.

\*A mean score of the two questions asked in FY18: Overall, please rate your impression of the World Bank Group's effectiveness in Armenia. Scale: 1-10 (1: Not effective at all– 10: Very effective); To what extent does the World Bank Group's work help to achieve development results in Armenia? Scale: 1-10 (1: To no degree at all– 10: To a very significant degree)

# Key Performance Indicators: Comparison

The mean ratings for Relevance, Alignment, Effectiveness, and Influence in achieving development results in Armenia were **significantly higher** than those in **other IBRD** countries surveyed in FY22, as well as in other **ECA** countries surveyed in FY22 (please refer to the footnote for the country lists), except for Effectiveness and Influence, which were statistically similar in Armenia and in other ECA countries.





# Overall Ratings for Indicator Questions: Local government is most positive

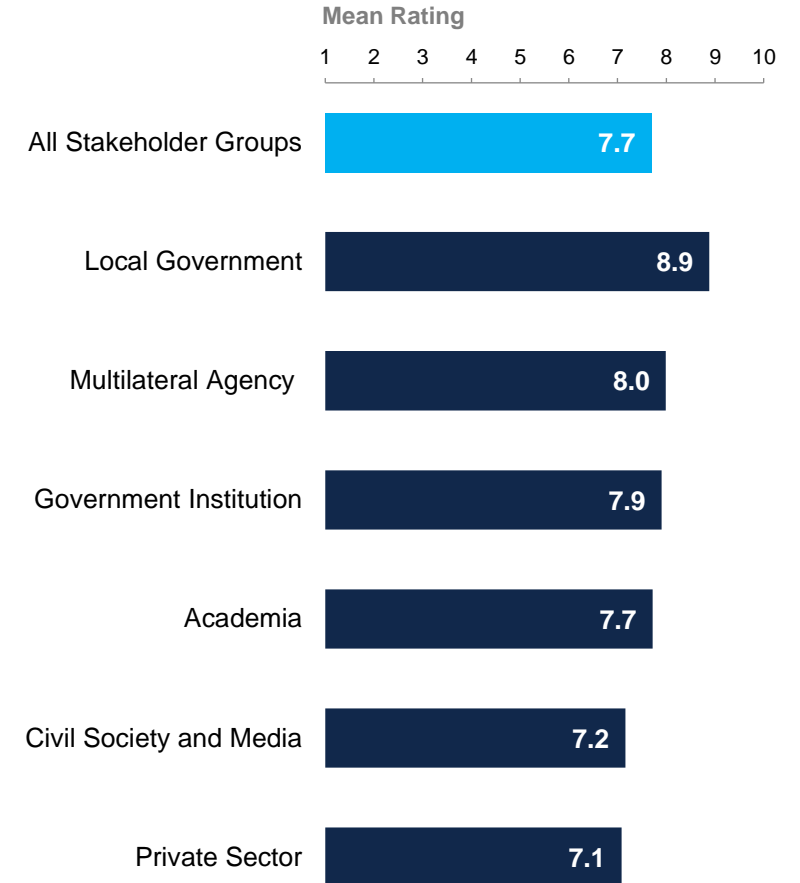
Respondents from **local government** gave the highest mean ratings for the aggregated responses to the [nineteen COS indicator questions](#), whereas respondents from the private sector had significantly lower mean ratings (see the chart on the right).

**Collaboration:** Respondents who collaborate with the WBG and respondents who don't collaborate had similar mean ratings to the nineteen indicator questions:

WB collaborators = **7.7**;

Non-collaborators = **7.6**.

\*Please note that the small number of respondents (n=3) from the "Office of a Parliamentarian (National Assembly)" was not included in this analysis



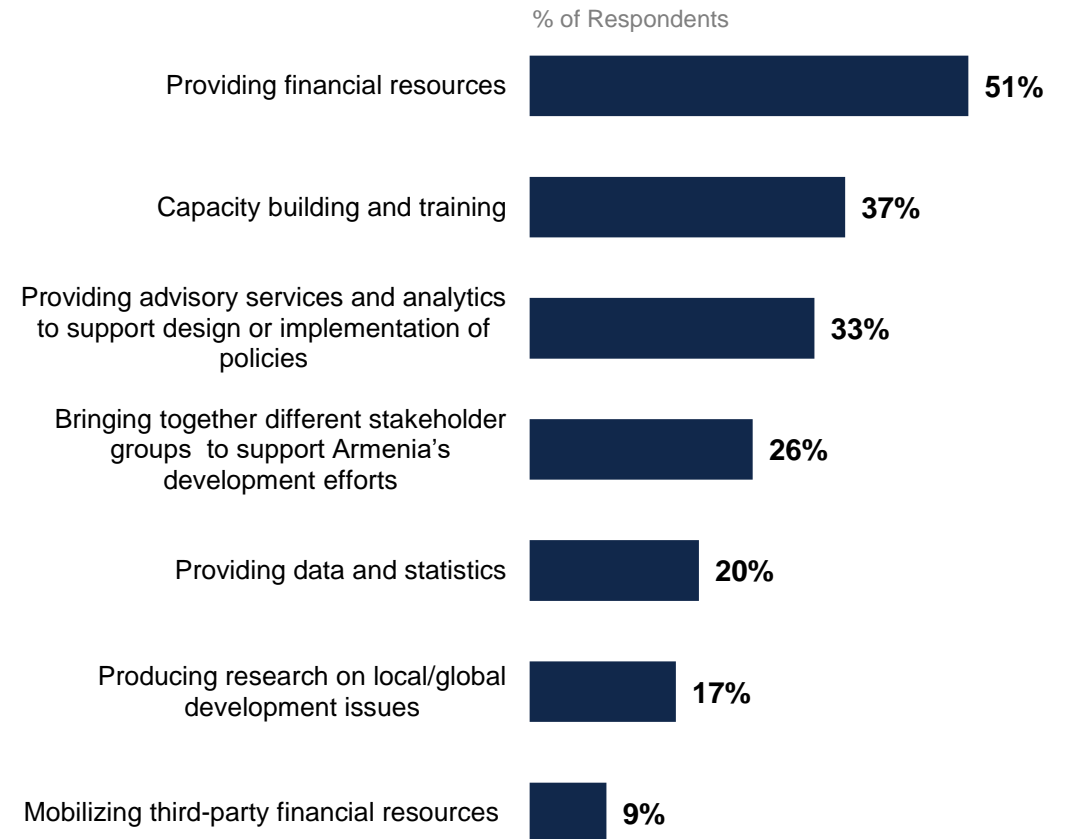


# **World Bank Group's Work and Engagement on the Ground**

# Greatest Value

**Financial resources** continue to be the most valued activity of the WBG in Armenia, along with its **capacity development** activities and **advisory services**.

**Notably, WBG's research on local and global development issues** is mostly valued by respondents from civil society and the media (42%).

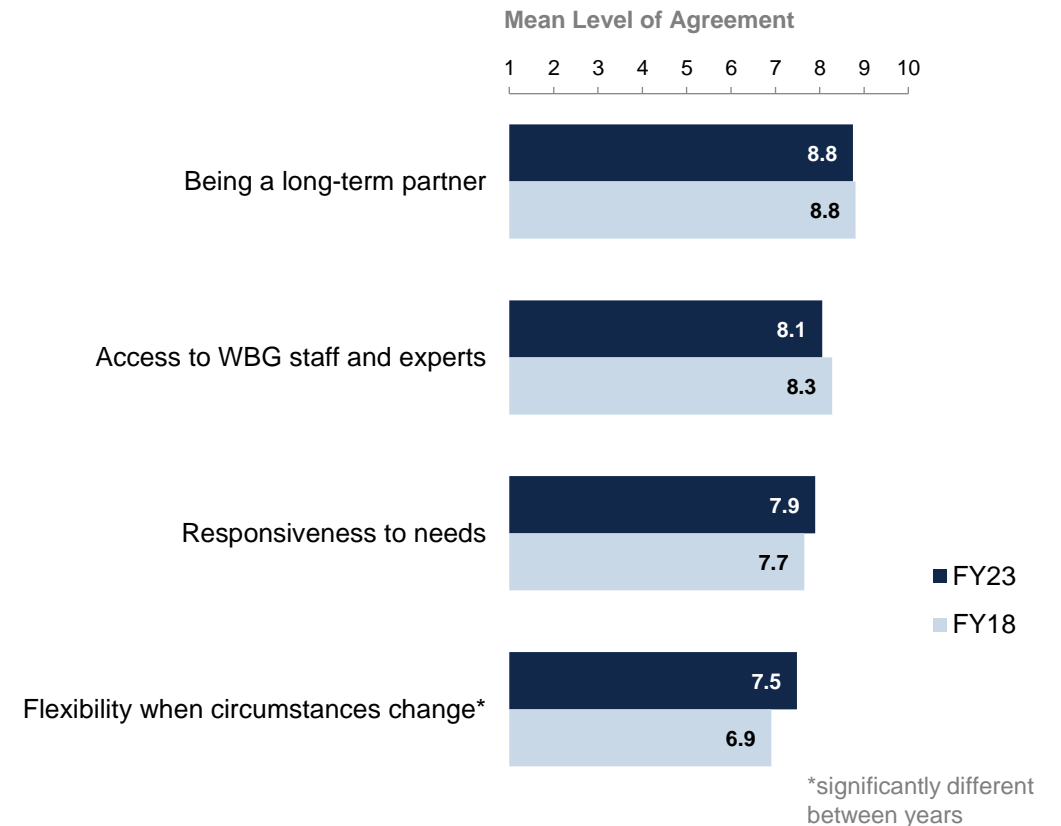


# The WBG as a Development Partner

The WBG is seen as a **responsive long-term partner** in Armenia; it is staff is perceived as rather **accessible**.

Perceptions of the WBG's **flexibility when circumstances change** significantly improved compared to FY18 results.

Notably, respondents from civil society, media, and the private sector tended to rank WBG's responsiveness and staff accessibility significantly lower—although still not negatively (mean scores of just over 7 out of 10)—compared to other stakeholder groups (mean scores of over 8 out of 10).

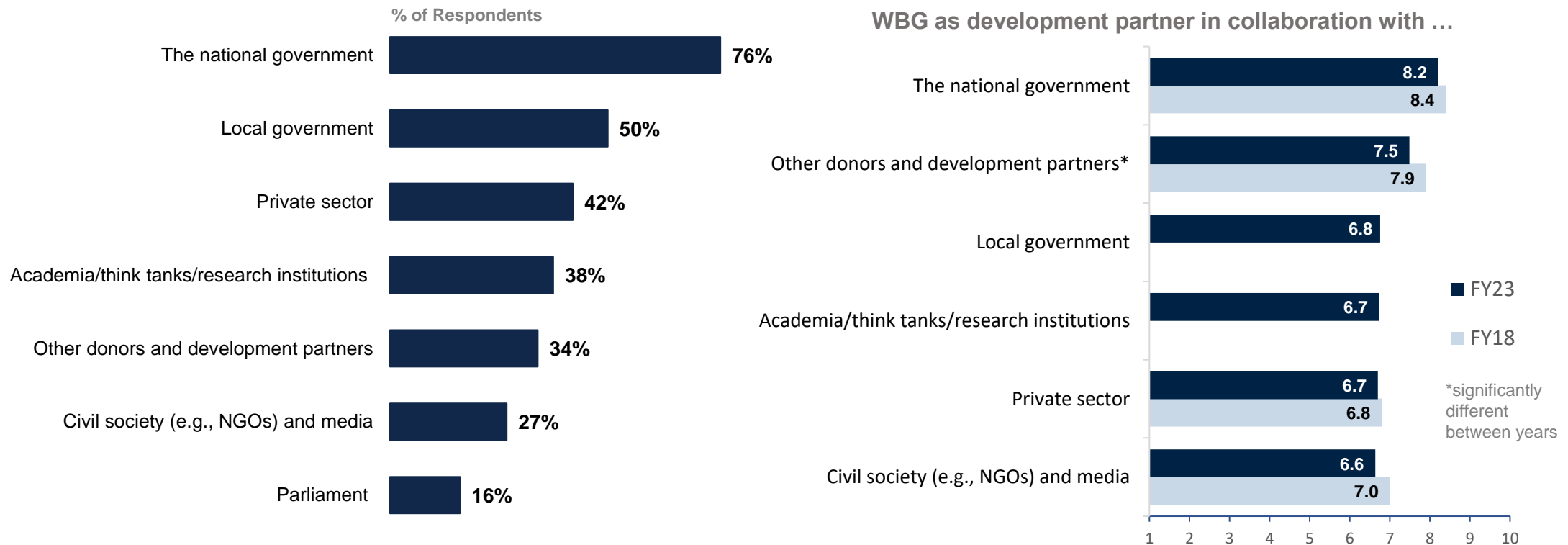


To what extent is the World Bank Group an effective development partner in Armenia, in terms of each of the following?, Scale: 1-10 (1: To no degree at all – 10: To a very significant degree)

# The WBG Should Collaborate More with ...

The majority of respondents suggest that the WBG should collaborate more with the **national government** (76%) and the **local government** (50%). However, other stakeholder groups expressed interest in more collaboration: thus, 79% of respondents from civil society and media said the WBG should collaborate more with civil society, 82% of respondents from the private sector – that it should collaborate more with the private sector, and 89% of respondents from the academia – that the WBG should collaborate more with the academia.

The WBG received the highest mean ratings for its collaboration with the national government (mean = 8.2) and with other donors and development partners (mean = 7.5). However, it tends to receive relatively lower ratings for its collaboration with other key stakeholder groups, which hasn't changed significantly since FY18, suggesting that there is a room for improvement (see the bar chart below on the right).

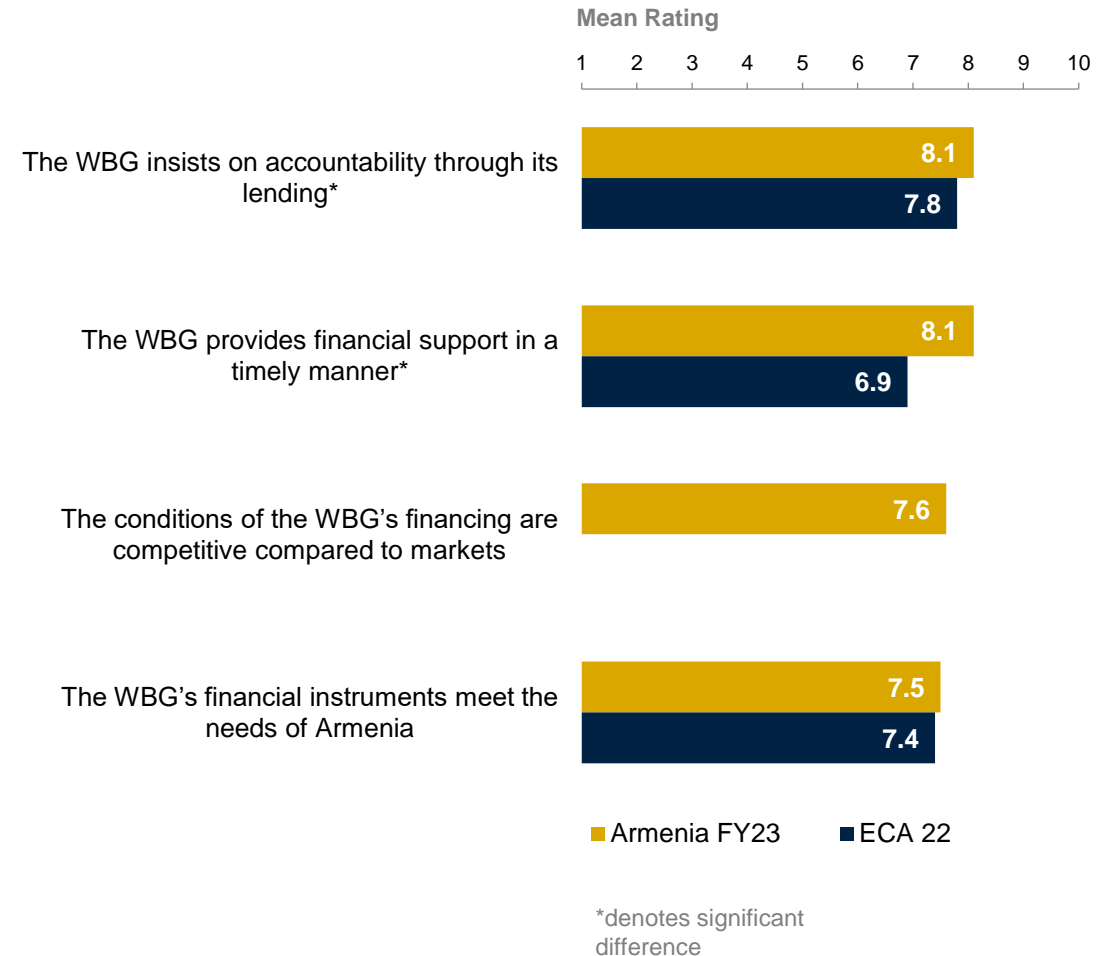


Which THREE of the following groups should the WBG collaborate with more in Armenia? (Choose no more than 3) (N=112)  
 To what extent is the WBG an effective development partner in Armenia, in terms of collaborating with the following groups:  
 (1-Strongly disagree, 10-Strongly agree)

# WBG's Financial Instruments

Respondents gave the highest ratings for the WBG's insisting on **accountability** through its lending and for the **timeliness** of its financial support. These ratings were also significantly higher when compared to other ECA countries surveyed in FY22.\*\*

The ratings for the competitiveness of the WBG financing and for WBG's financial instruments meeting Armenia's needs were somewhat lower, although not negative; the latter one was on par with other ECA countries.



The following questions ask about the WBG's financial support to Armenia. If you have NO exposure to, or experience with, the WBG's financing – please respond “Don't know”

To what extent do you agree/disagree with the following statements about the World Bank Group in Armenia?  
Scale: 1-10 (1: Strongly disagree– 10: Strongly agree)

\*\*ECA FY22 included: Bulgaria, Tajikistan, Kosovo



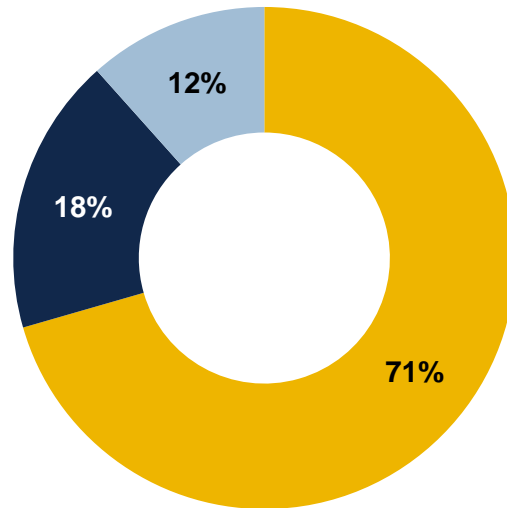
# **World Bank Group's Knowledge Work and Activities**



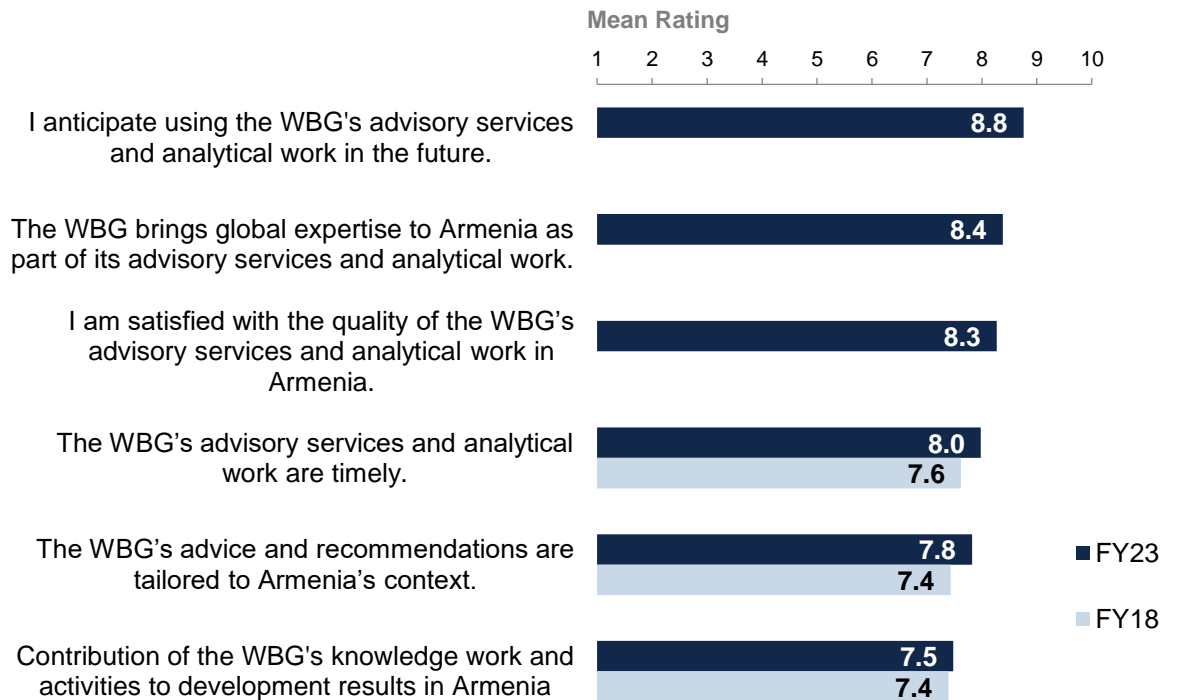
# WBG's Knowledge Work

Seven in ten respondents (71%) report using WBG's advisory services and analytical work. **Across all stakeholder groups**, respondents tend to give rather high rankings for the quality of the WBG's knowledge work in Armenia and they suggest that they will keep using WBG's advisory services and analytics in the future. One area where the WBG could continue improving is **greater tailoring of its advice and recommendations to Armenia's context**, which may increase its contribution to the development outcomes (the lowest rank – please see the chart below on the right).

## Use WBG's advisory services and analytics



■ Yes ■ No ■ Not sure



The following questions ask about the WBG's advisory services and analytical (knowledge) work in Armenia.

Have you used the WBG's advisory services and analytics in the past? (N=112)

To what extent do you agree/disagree with the following statements about the World Bank Group in Armenia? Scale: 1-10 (1: Strongly disagree– 10: Strongly agree)

How significant a contribution do you believe the World Bank Group's knowledge work and activities make to development results in Armenia?

Scale: 1-10 (1: Not significant at all– 10: Very significant)

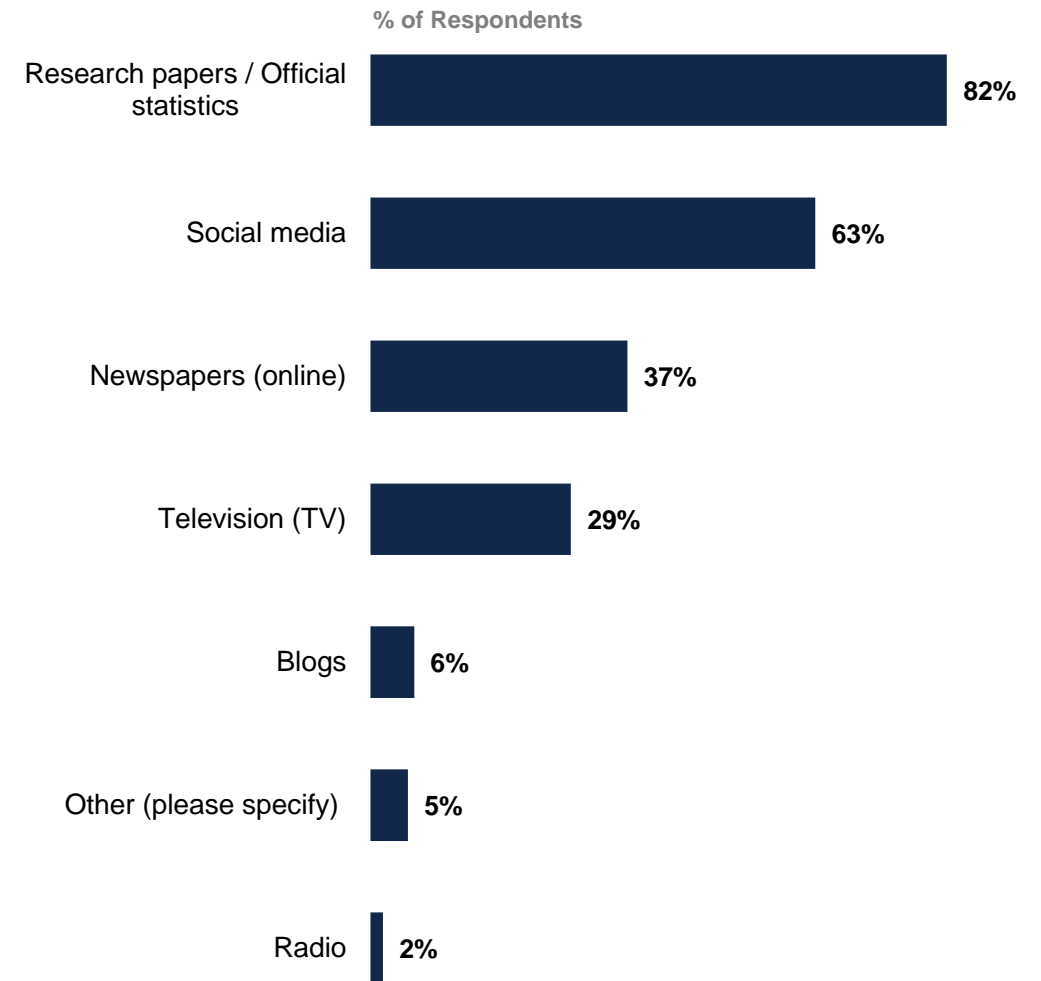


# Communication and Outreach

# General Information Sources

Respondents report using a variety of sources to get information about economic and social development issues in Armenia, but a majority across all stakeholder groups use **research papers / official statistics (82%)** and **social media (63%)**.

Respondents from local government are more likely to rely on **television (83%)** for news, while **respondents from the academia (78%)** and **private sector (53%)** prefer online newspapers.

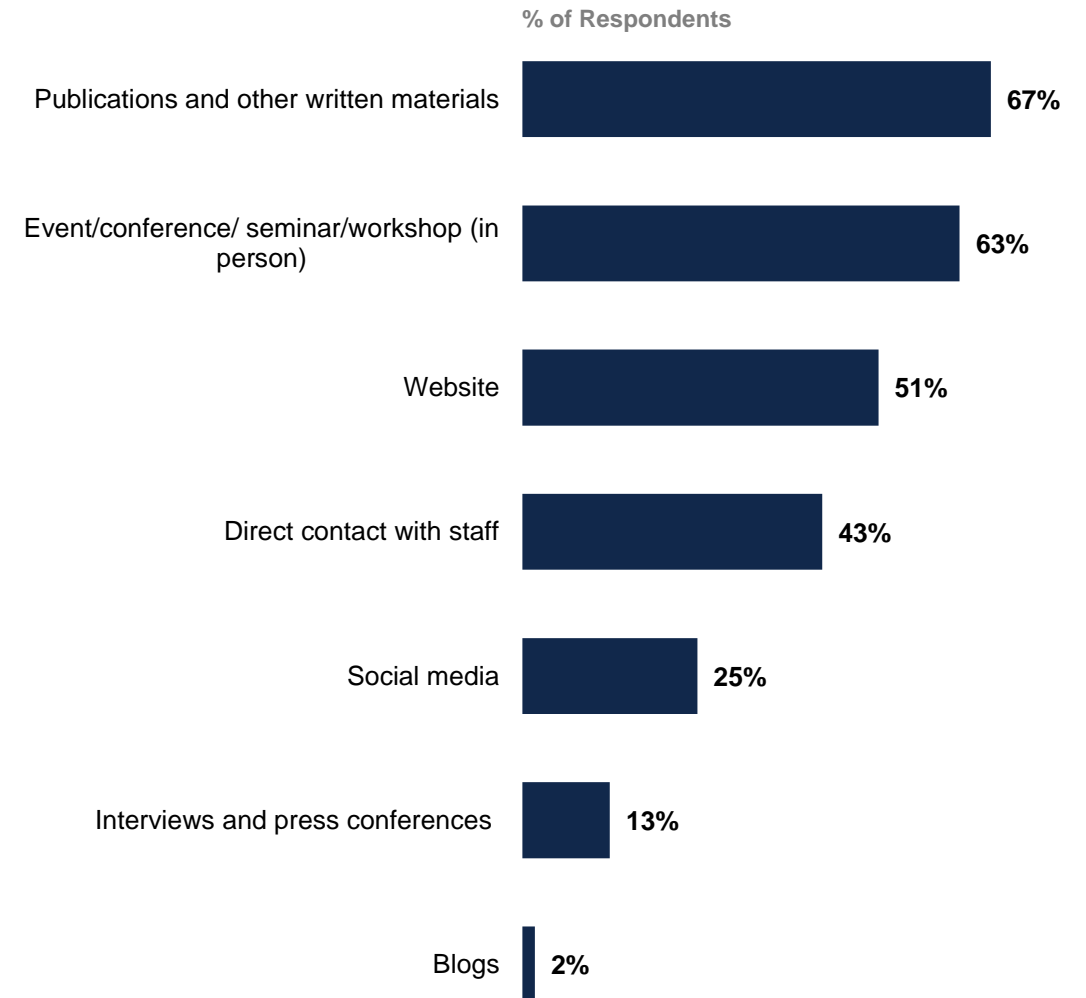


# Preferred WBG Information Sources

Respondents across stakeholder groups prefer **WBG's publications and written materials** as the main way of obtaining information from the WBG (67%), which aligns with their choice of the general informational sources.

However, almost equally important (63%) are in-person **events / conference / seminar / workshops**, which are consistently valued by respondents in both survey years.

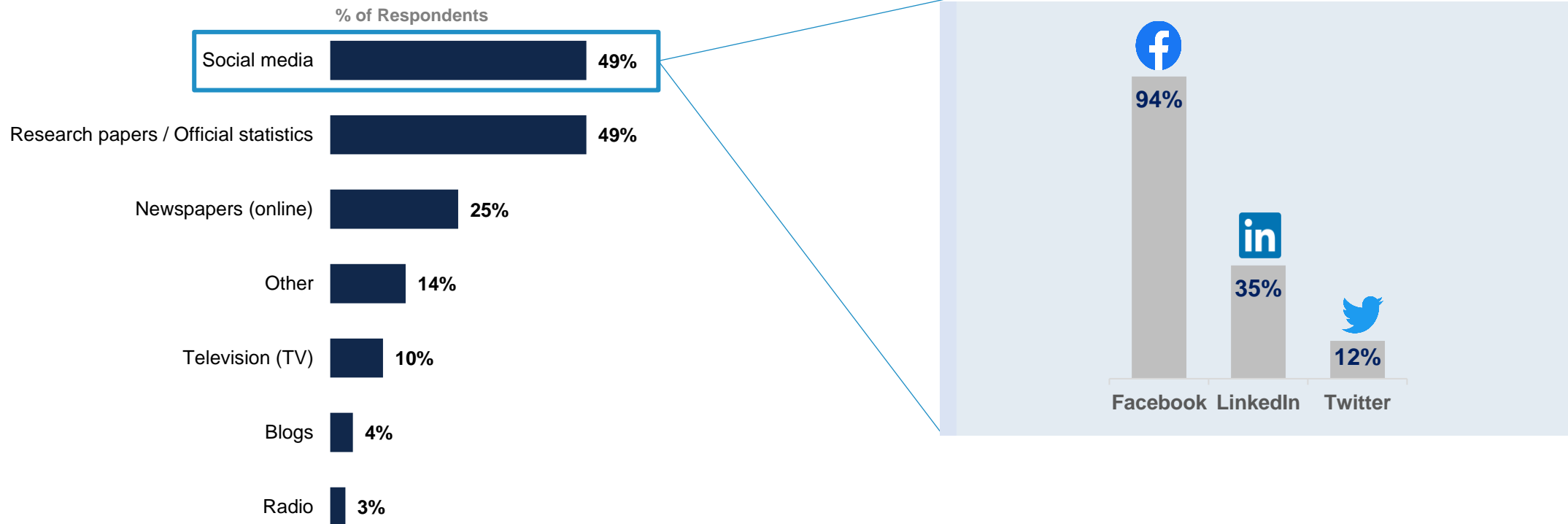
Notably, the importance of the **direct contact** (#1 choice in FY18) has waned after the pandemic, but is still important for 43% of respondents, and is higher than a preference for social media channels (25%). **This points to the importance of in-person communication and knowledge sharing in Armenia.**



# Recent interactions with the WBG

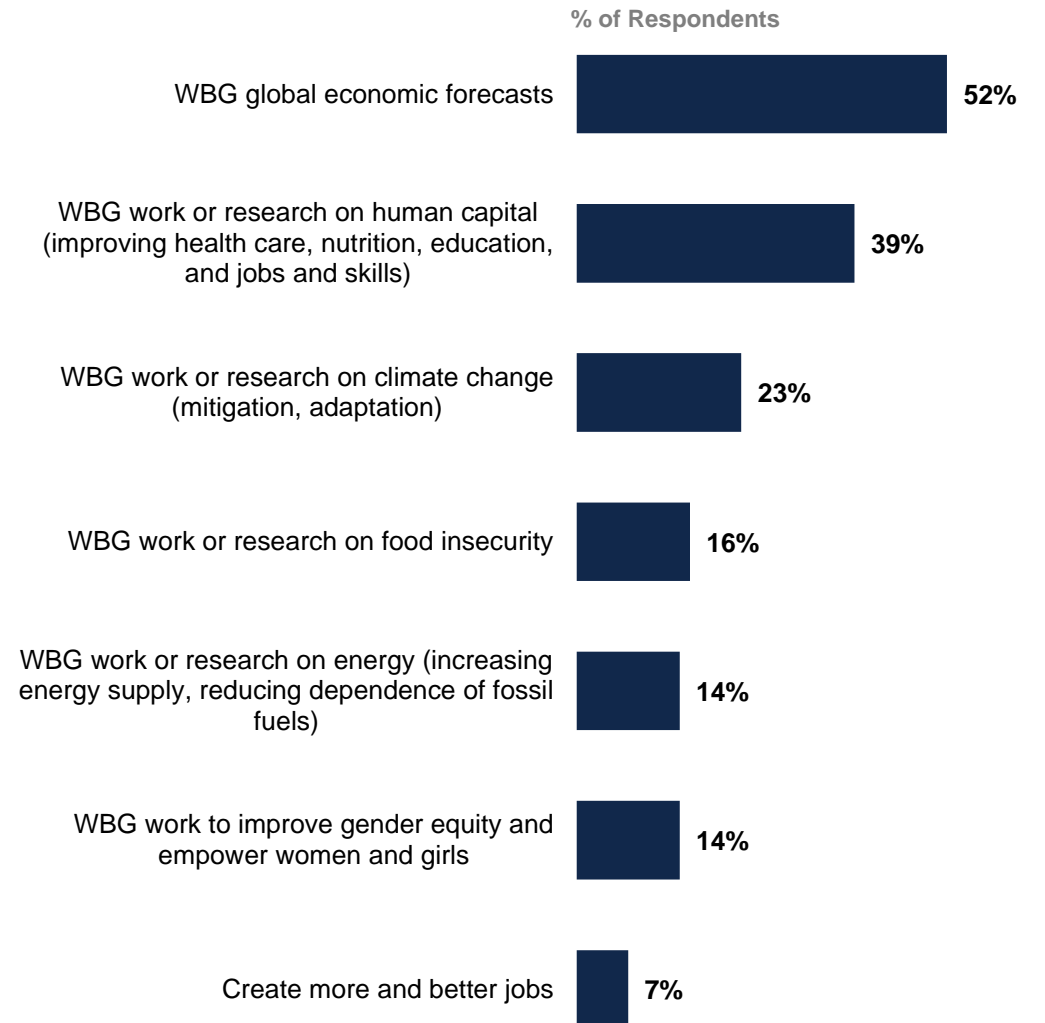
**62%** of respondents recall hearing or seeing something about the WBG in the last 30 days.

Most respondents (49%) report seeing that information on **social media** channels and via **research papers / official statistics** (49%). Among those who selected “Social media”, most respondents report seeing something on **Facebook** (94%), followed by **LinkedIn** (35%).



# Topic recall in the last 30 days

**Global economic forecasts (52%)** and **WBG's work or research on Human capital (39%)** were the top two topics respondents recalled seeing or hearing about in relation to the WBG in the last 30 days.

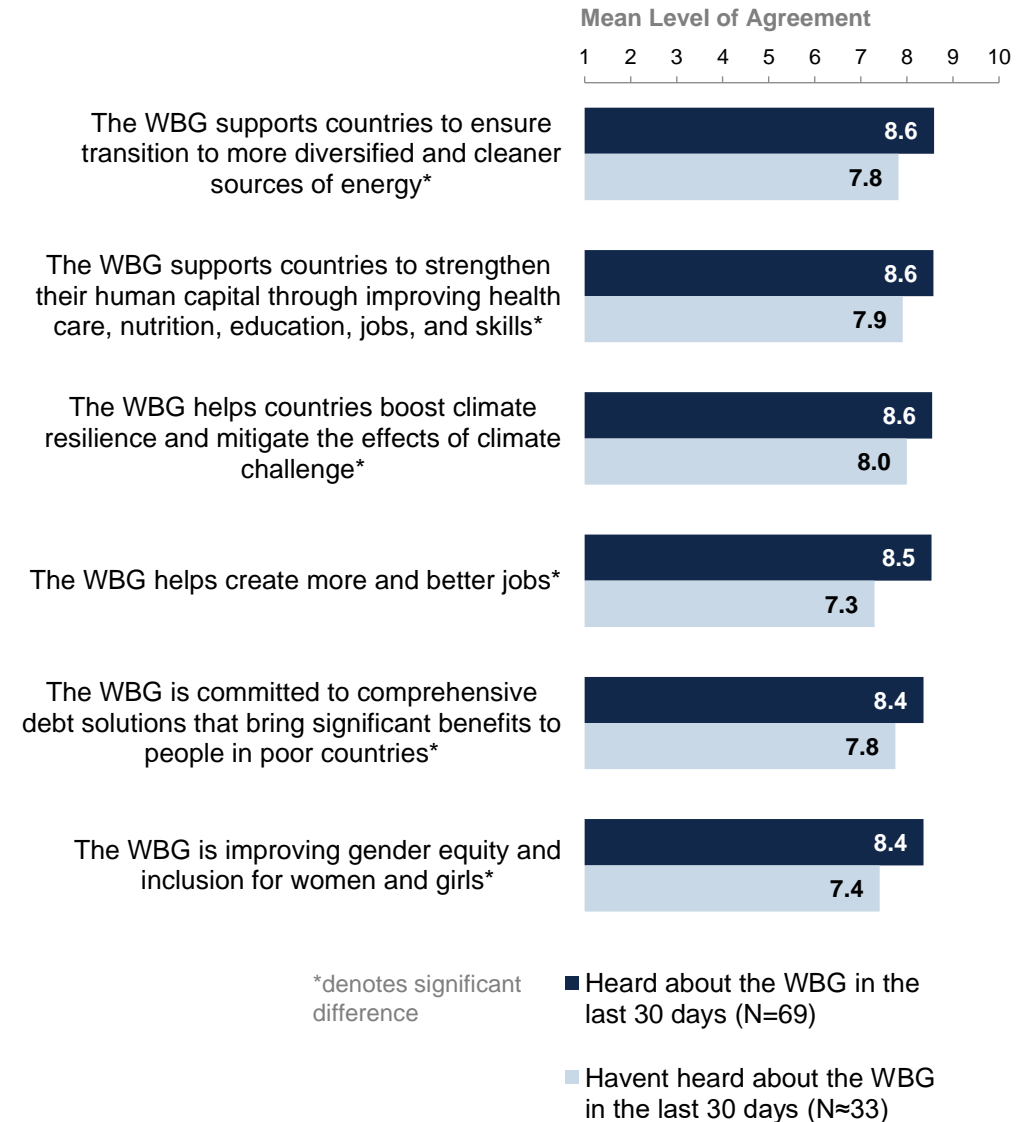


# Message recall and perceptions of the WBG's work

Those respondents who recall seeing or hearing something about the WBG in the last 30 days also **tend to give significantly higher rankings** on the key areas of the WBG work (see the bar chart on the right). They also report a significantly higher perceived level of familiarity with the WBG (**mean = 7.8**), compared to those who reported not hearing or seeing anything about the WBG recently (**mean=7.1**).

Those who collaborate with the WBG, were slightly more likely to recall messages about the WBG (65%) than those who don't collaborate (52%), but this difference was not significant. There were some variations among stakeholder groups, however, also not significant.

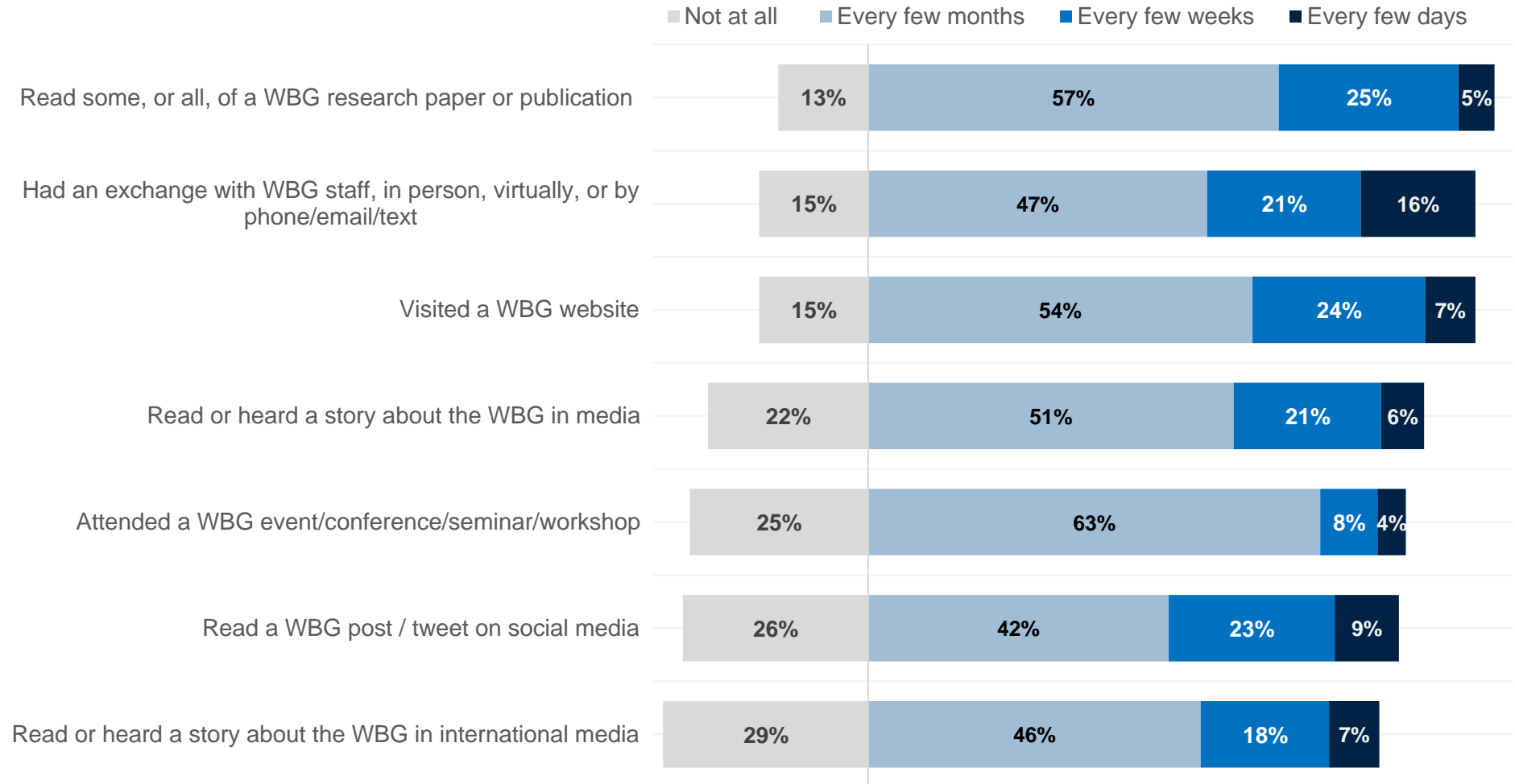
**These findings suggest that respondents who are more frequently exposed to the information about the WBG, or who actively engage with the WBG's staff or with the institution's knowledge work (read research papers, etc.) are also more likely to hold more positive views about the WBG's work.**





# Frequency of WBG Engagement / all respondents

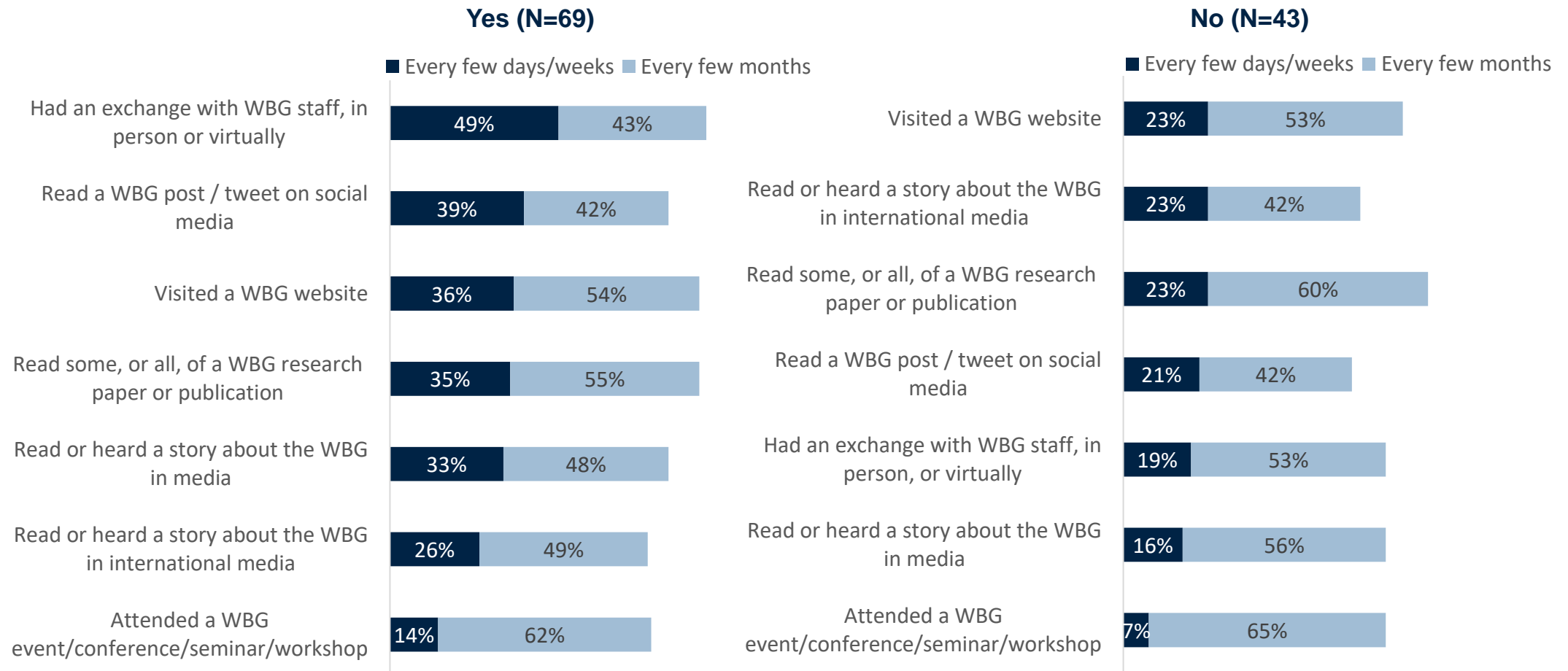
WBG's publications, website, and personal interactions are the most widely used channels by the stakeholders; however, other channels are also used by over 70% of respondents. This high level of engagement is most probably due to the high proportion of respondents (74%) who report collaborating with the WBG professionally.



# Frequency of Engagement matters for message recall

Respondents who recall hearing something about the WBG in the last 30 days tend have more frequent interactions with the institution **across all channels**, including, most notably, **more personal interaction with the WBG staff**. They are also more likely to read WBG's **social media channels**, visit the website, or read a research paper, and less likely to rely on media for the news about the WBG.

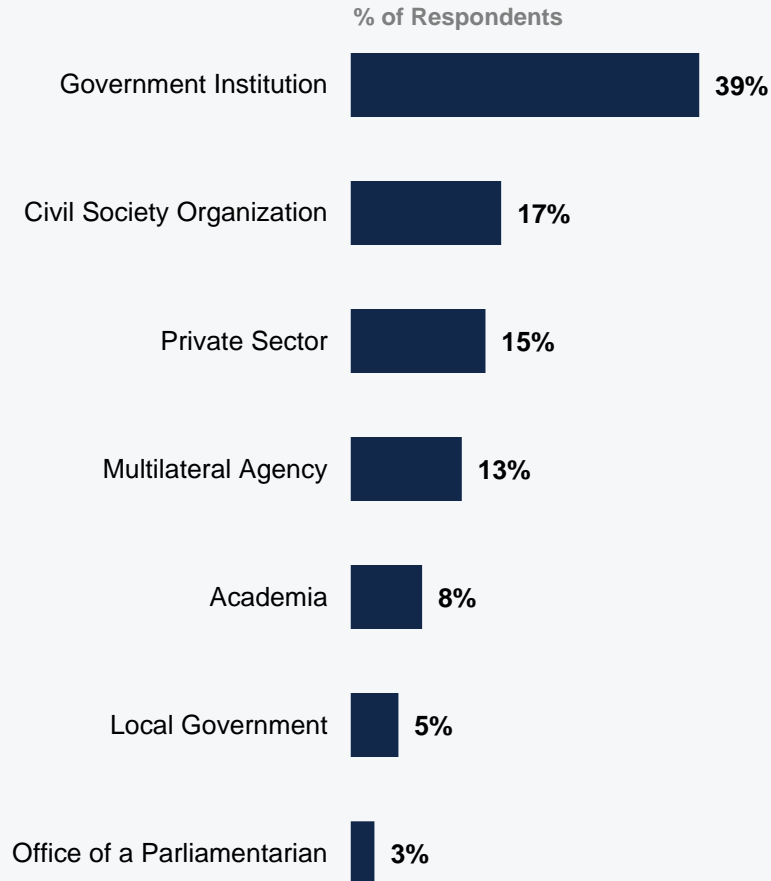
**Do you recall seeing or hearing anything about the WBG in the last 30 days?**



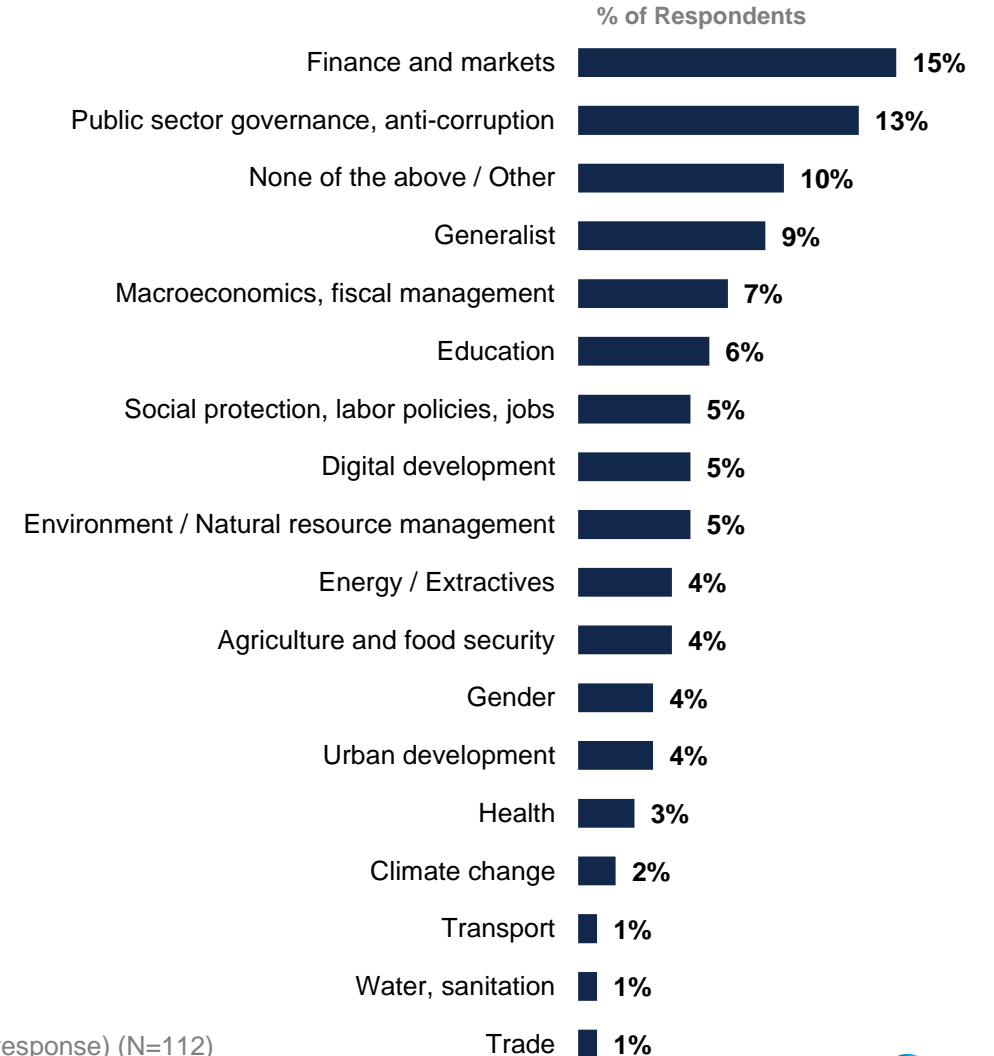
# Demographics of the Sample

# Respondent Profile: Affiliation and Specialization

## Current Affiliation



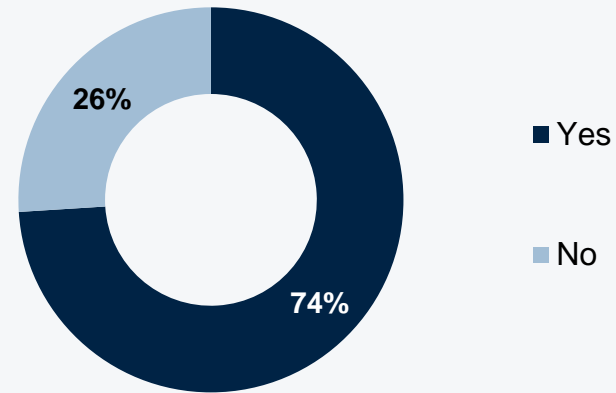
## Specialization



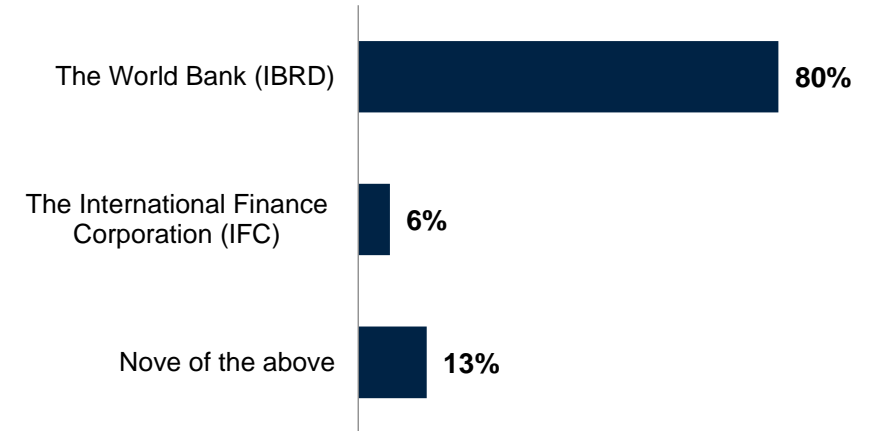
Which of the following best describes your current affiliation? (Select only 1 response) (N=112)  
Please identify the primary specialization of your work. (Select only 1 response) (N=112)

# Respondent Profile: Collaboration with the WBG

Collaboration with the WBG



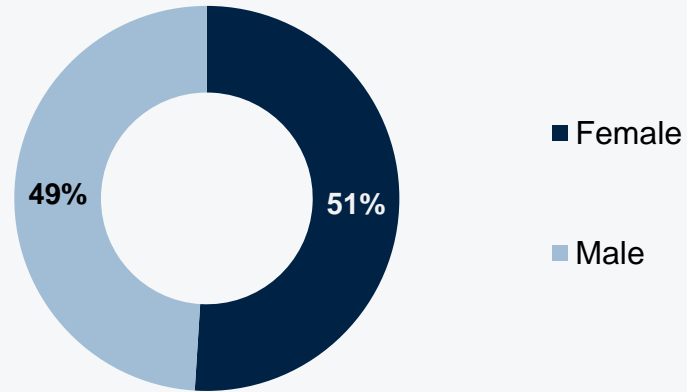
Collaboration Institution



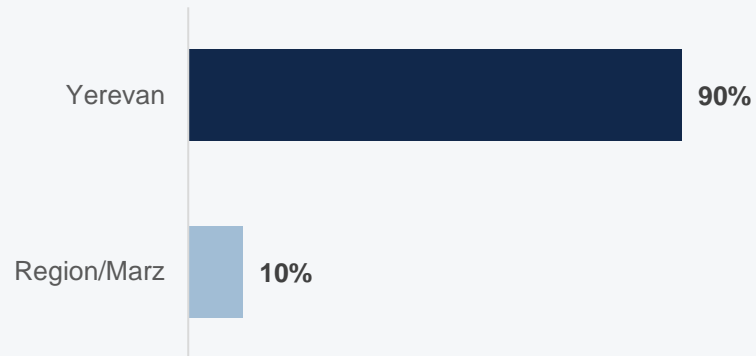
Currently, do you professionally collaborate/work with the World Bank Group (IBRD, IFC, MIGA, ICSID) in your country? (N=112)  
Which of the following agencies of the World Bank Group do you primarily collaborate/work with in Armenia? (Select only 1 response) (N=112)

# Respondent Profile: Demographics

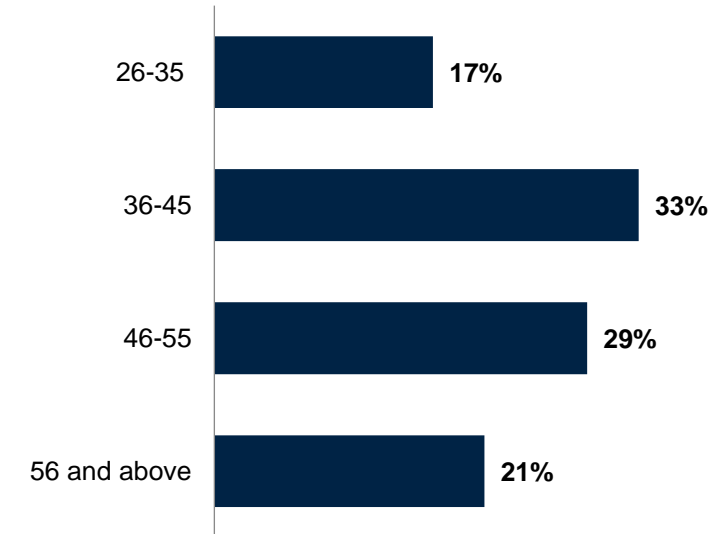
**Gender**



**Location**



**Age**



What's your gender? (N=112)

What's your age (N=112)

Which best represents your geographic location? (N=112)

# Methodology



# Methodology

**From December 2022 to February 2023, 197** stakeholders of the WBG in Armenia 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 Prime Minister; office of a Minister; national government institutions; local governments; multilateral agencies; private sector; civil society organizations; from the academia, research institutes, and think tanks; from the media and other organizations.

**A total of 112 stakeholders participated in the survey (57% response rate).** Respondents completed the questionnaire via an online platform.

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

# Year comparison

The results in this year's Country Survey were compared to those in the Country Survey conducted in FY18 (response rate was 85%, N=170).

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 the stakeholder groups in the final samples in FY18 and FY23 country surveys are listed in the table on the right.

This year's survey saw an increased outreach to and response from multilateral agencies, but a decrease in outreach to and response from high-level government offices. These differences in the stakeholder composition between the two years should be taken into consideration when interpreting the results of the past-year comparison analyses.

Breakdowns for individual questions by year can be found in the "Armenia COS FY23 Tables with data breakdowns.xlsx" file published in the WBG Microdata Library, along with the survey microdata and this report.

% of Respondents	FY 2018	FY 2023
<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	18%	3%
<b>Government Institutions:</b> employees of ministries, Project Management Unit (PMUs)/consultants on WBG-supported projects, independent government institutions, )	33%	39%
<b>Local government</b>	2%	5%
<b>Bilateral/multilateral agency:</b> embassy, diplomatic, military, UN, regional development bank	6%	13%
<b>Civil Society Organizations (CSO):</b> NGOs/community-based organizations, private foundations, faith-based groups, professional/trade associations, and youth groups; <b>Media</b>	20%	17%
<b>Private Sector:</b> private sector organizations and financial sector/private banks	10%	15%
<b>Academia/Research Institute/Think Tank</b>	8%	8%
<b>Other</b>	3%	0%
<b>Total Number of Respondents</b>	168	112

# Statistical analysis

To attribute respondents to different stakeholder groups, their self-reported responses to the question [“Which of the following best describes your current affiliation?”](#) were used; notably, a small number of respondents from the Office of a Parliamentarian were not included in the analysis by stakeholder group.

Breakdowns for individual questions by stakeholder group can be found in the “Armenia COS FY23 Tables with data breakdowns.xlsx” file published in the WBG Microdata Library, along with the survey microdata and this report.

## Scale bucketing:

When mentioning **Low**, **Medium**, and **High** in scales throughout the report: 1-6 is low, 7-8 is medium, and 9-10 is high.

## Statistical significance:

Key statistically significant findings are denoted with an asterisk (\*) throughout the report or discussed in the descriptions to the charts.

Significance is measured at  $p\text{-value} < .05$

Groups	n	%
<b>Office of a Parliamentarian</b> (National Assembly)	3	3%
<b>Government Institution:</b> Employee of a Ministry / Ministerial Department / Project Implementation Unit / Independent Government Institution (e.g., Central Bank, Regulatory or Oversight Agency) / Judiciary / State-Owned Enterprise	44	39%
<b>Local Government Office</b>	6	5%
<b>Multilateral Agency</b> (e.g., development organization, development bank, UN Agency)	14	13%
<b>Civil Society Organization:</b> local and regional (NGO; Community Based Organization; Private Foundation; Professional group) and Media	19	17%
<b>Private Sector:</b> Private Company / Financial Sector Organization / Private Bank	17	15%
<b>Academia/Research Institute/Think Tank</b>	9	8%
<b>Total</b>	<b>112</b>	<b>100%</b>

# Indicator questions

**A2\_5.** 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)

**A3.** How effective has the World Bank Group been in achieving development results in Armenia?

**A4.** Overall, the World Bank Group currently plays a relevant role in development in Armenia, Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

**A5.** The World Bank Group's work is aligned with what I consider the development priorities for Armenia, Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

**A6.** The World Bank Group's work helps end extreme poverty in Armenia, Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

**A7.** To what extent does the World Bank Group influence the development agenda in Armenia? Scale: 1-10 (1: To no degree at all – 10: To a very significant degree)

**A8.** 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)

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

**C2.** Responsiveness to needs, **C3.** Access to WBG staff and experts, **C4.** Flexibility when circumstances change, **C5.** Being a long-term partner,

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

**C7\_1.** Collaboration with the national government

**C7\_3.** Collaboration with the private sector

**C7\_4.** Collaboration with civil society

**C7\_5.** Collaboration with other donor and development partners

**C8\_1** To what extent do you agree/disagree with the following statement? – The WBG's financial instruments meet the needs of Armenia (i.e., investment lending, Development Policy Loan, Trust Funds/Grants). Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

**C8\_4.** To what extent do you agree/disagree with the following statement? – The WBG provides financial support in a timely manner., Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

**C10\_1.** To what extent do you agree/disagree with the following statements about the World Bank Group in Armenia? I am satisfied with the **quality** of the WBG's advisory services and analytical work in Armenia. Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

**C10\_4.** To what extent do you agree/disagree with the following statements about the World Bank Group in Armenia? The WBG's advice and recommendations are **tailored** to Armenia's context. Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

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