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Country Opinion Surveys

FY 2023 North Macedonia Country Opinion Survey Report

ECR Business Intelligence Team



WORLD BANK GROUP

Acknowledgements

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Disclaimer

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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 North Macedonia 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 North Macedonia'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

“[The WBG should provide] support for the development and implementation of a long-term vision for progress (economic and societal [aspects]).”

Civil Society Respondent

“Increased sharing of advice on how to enhance economic development and reduce poverty”

Media Respondent

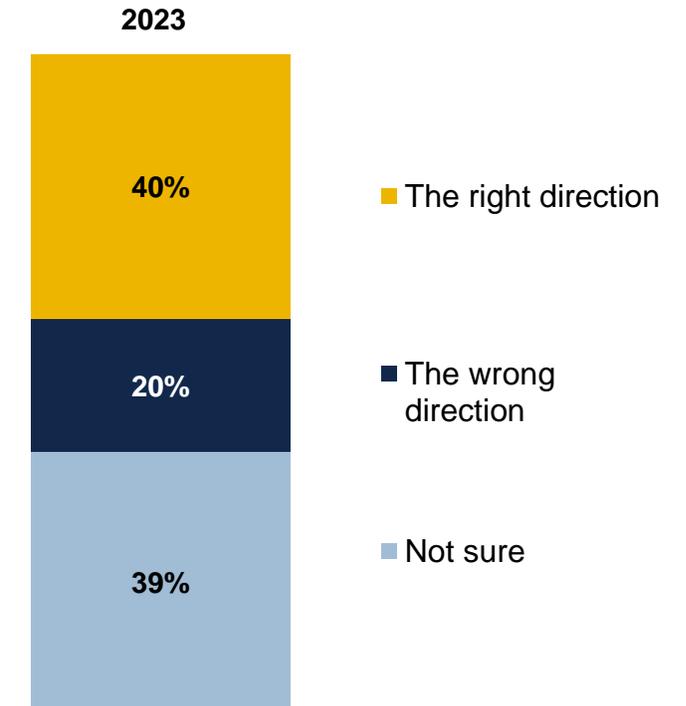
Respondents are Split over North Macedonia's General Direction

Respondents in North Macedonia have significantly varying opinions about their country's general direction. Whereas 83% of the respondents from high government offices agree that North Macedonia is headed in the right direction, only 17% of respondents from civil society do.

Notably, over one-third of the respondents **are not sure** about the country's direction, and in some stakeholder groups (private sector, civil society, academia, media), up to half are unsure.

In FY19, most respondents (51%), including civil society stakeholders, tended to be "somewhat optimistic", which suggests growing pessimism.

Country direction



FY23: In general, would you say that North Macedonia is headed in ... ? (N=216)

FY19: When you think about the future in FYR Macedonia, are you ... ? (Very pessimistic, Somewhat pessimistic, Somewhat optimistic, Very optimistic, Not sure) (N=183)

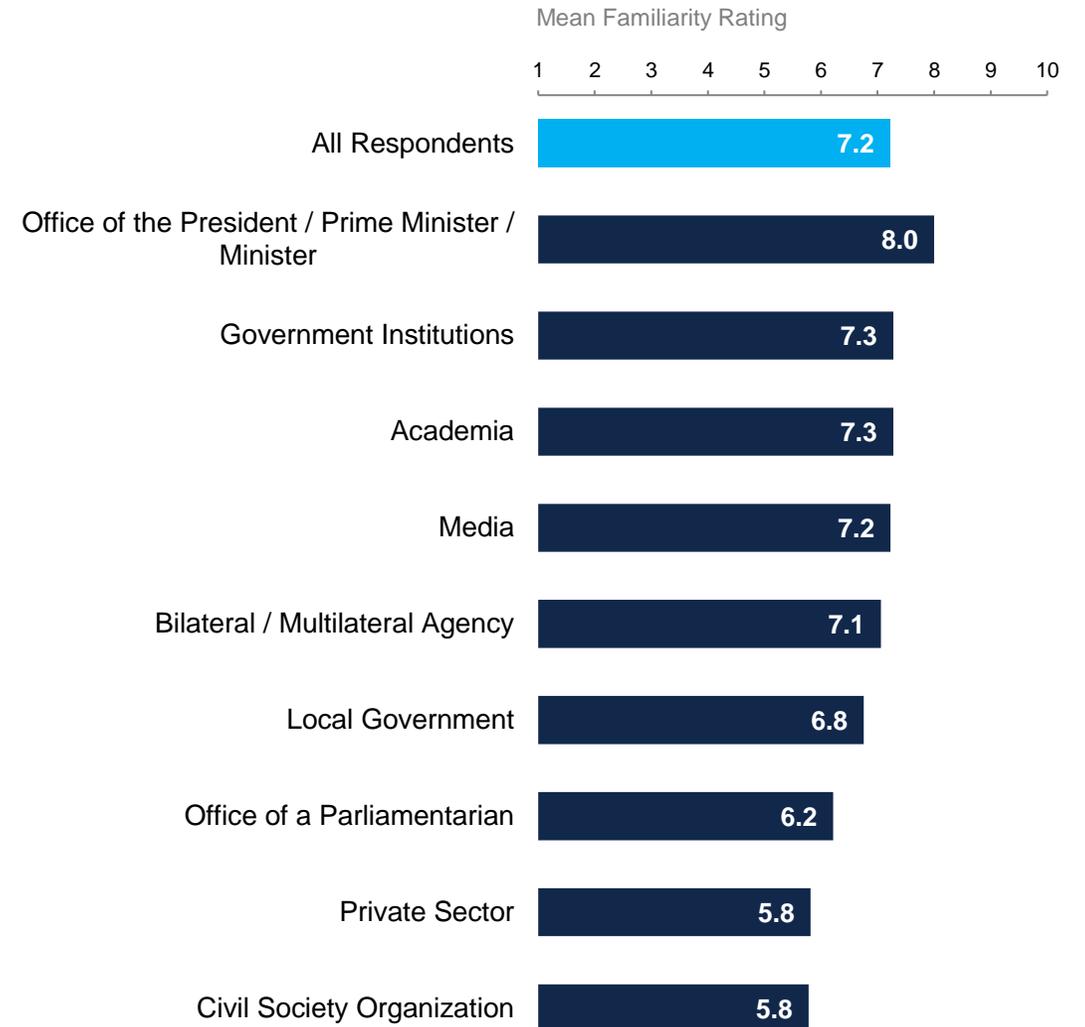
Familiarity with The World Bank Group

Comparison of FY19 and FY23: Respondents in this year's Country Survey report similar levels of familiarity with the World Bank Group as in FY19:

Mean familiarity: FY23 = **6.8**;
FY19 = **6.9**.

Collaboration: Respondents who collaborate with the WBG report significantly higher levels of familiarity with the institution's work :

Mean familiarity: WBG collaborators = **7.6**
Non-collaborators = **5.9**

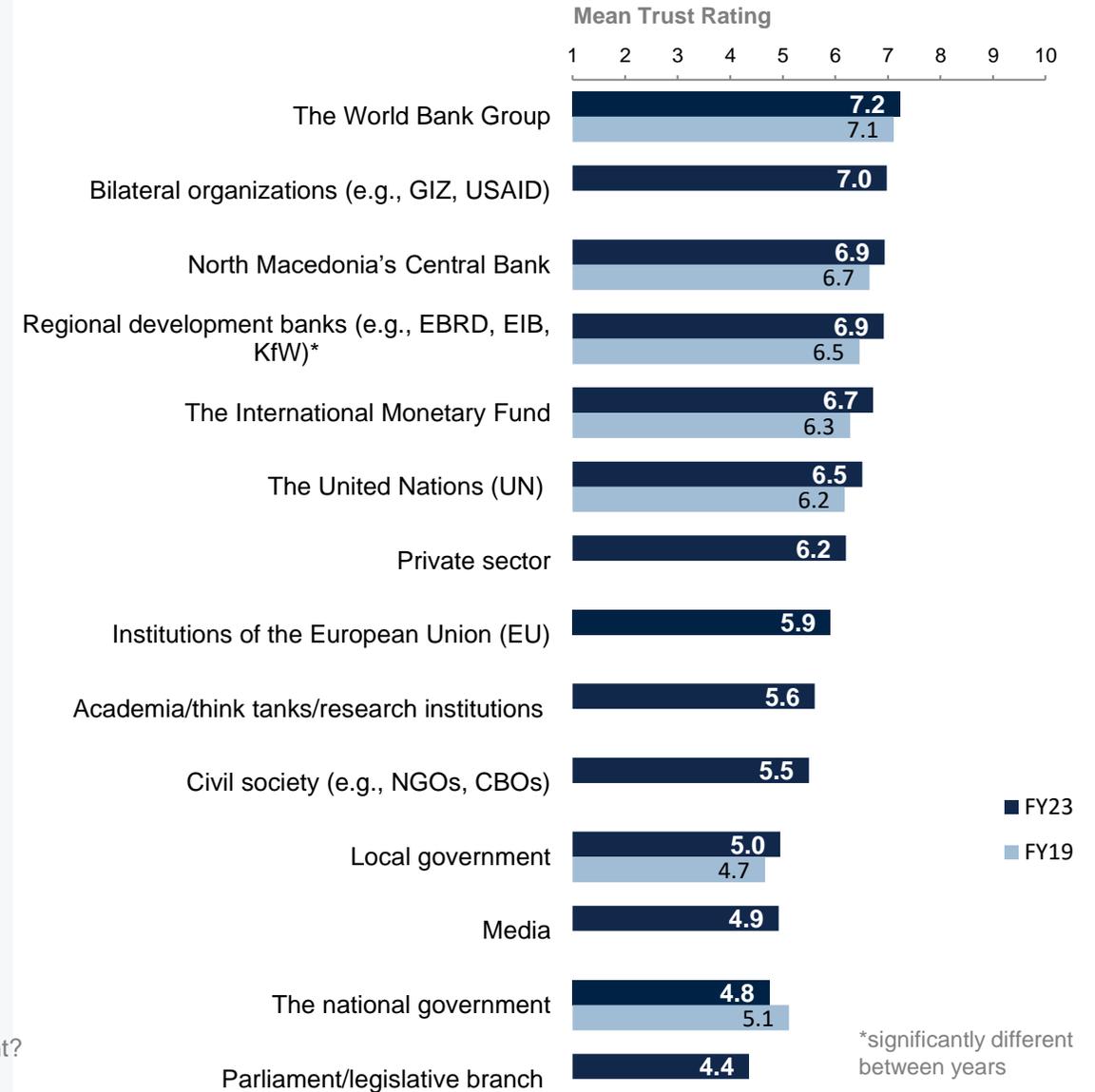


How familiar are you with the work of the World Bank Group in North Macedonia? Scale: 1-10 (1: Not familiar at all – 10: Extremely familiar)

Trust in Institutions

The WBG, along with regional development banks, bilateral organizations, and North Macedonia’s Central Bank, continue to be the most trusted institutions in North Macedonia from among those studied.

At the same time, the Parliament, the national government, and the media 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)

Note: CBO= Community-based Organization; EIB= European Investment Bank; EBRD= European Bank for Reconstruction and Development; GIZ= German Society for International Cooperation; KfW= German Reconstruction Credit Institute; NGO= Non-governmental Organization; USAID= United States Agency for International Development.

*significantly different between years

World Bank Group's Support in Development Areas

*“Budget allocations for routine and periodic maintenance of infrastructure.
Affordable options for childcare or elder care, appropriate transportation, flexible work agreements.
Programs for energy efficiency and the use of more efficient heating stoves... [as well as the]
transition to cleaner fuels, such as wood pellets or natural gas.[Also,] improvements in urban
transportation management.”*

Government Institution Respondent

“Reforms in education at all levels, Improvement of governance, and raising institutional capacities.”
Academia Respondent

Development areas for the WBG to focus

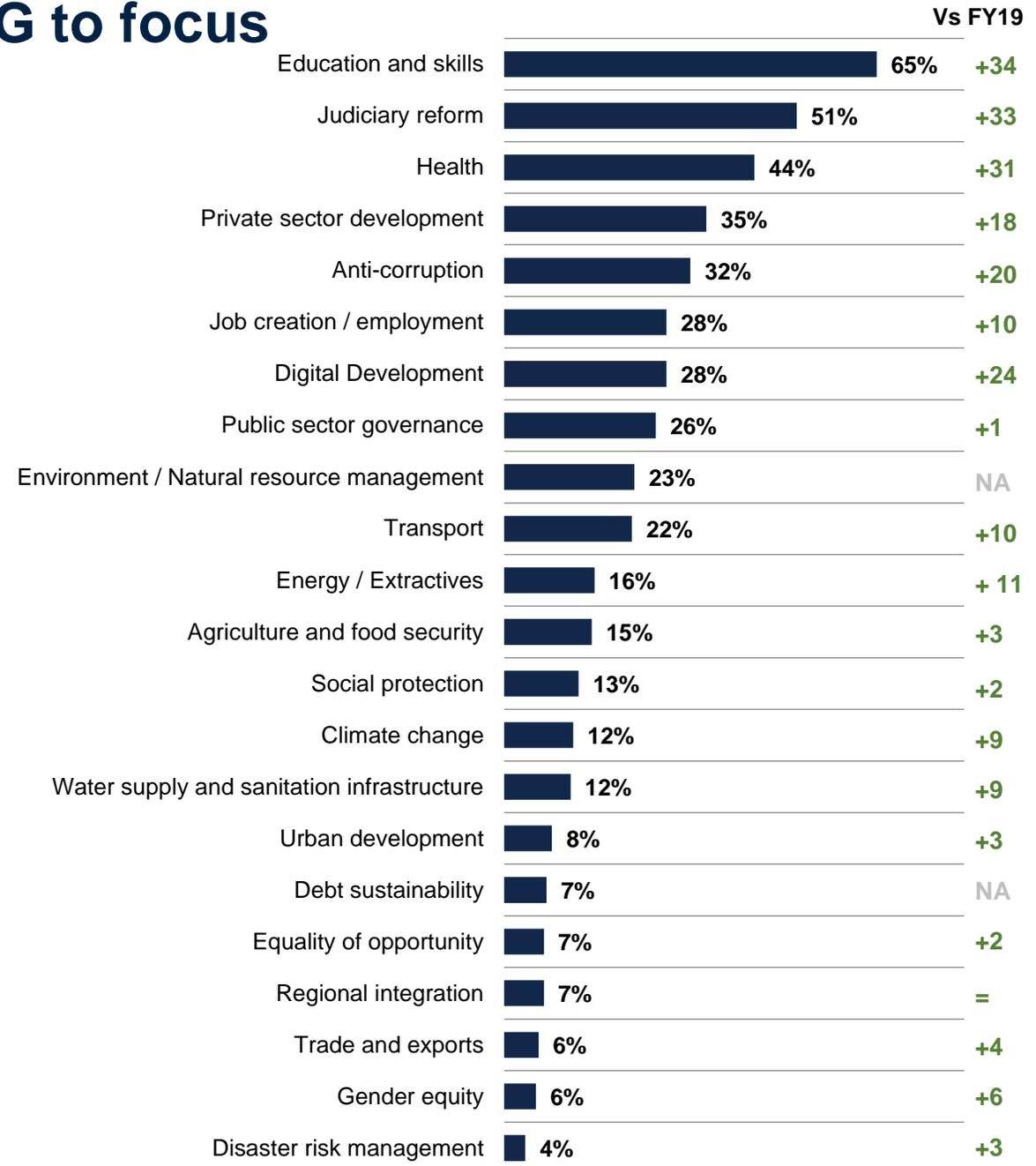
In FY23 stakeholders would like the WBG to focus its resources on: **Education and skills**, **Judiciary reform**, and **Health**. All three areas significantly increased in priority since FY19. Whereas Education and Health are top priorities across all stakeholder groups, Judiciary reform was a significantly higher priority for respondents from the Parliament (86%), local government (65%), the media (62%), and academia (61%).

- Respondents who identified their primary specialization of work as “education” (14% of the sample) were significantly more likely to indicate that “education” was a top development priority (93%) compared to respondents from other sectors (61%).

In FY23, **Digital development** (in FY19, referred to as information and communication technologies or ICT), **Anti-corruption**, and **Private sector** development grew in prominence, with more than twice as many respondents selecting them from among the top development priorities as compared to FY19.

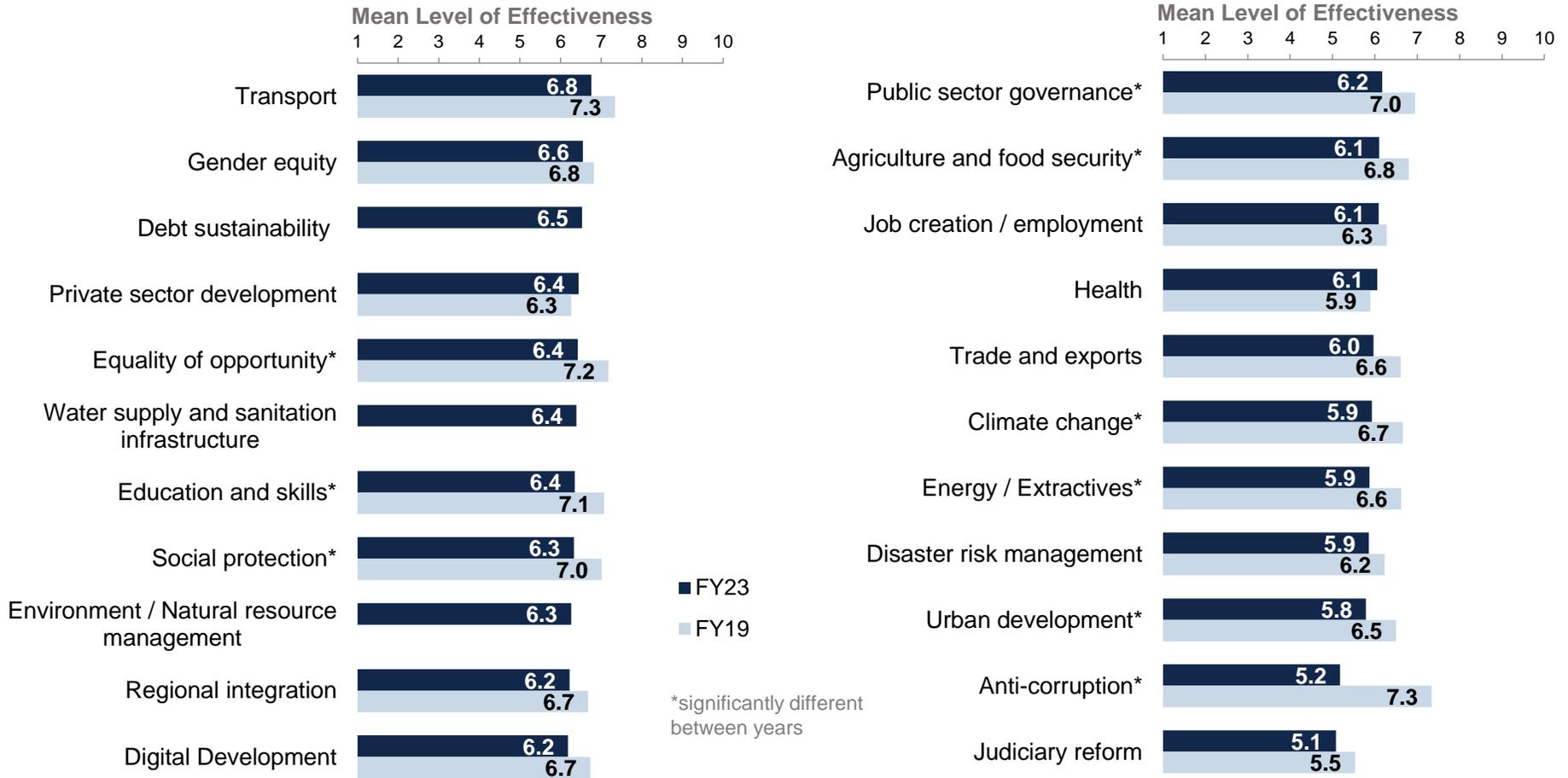
Note: The overall increase in percentages in the chart is partially attributable to the change in the methodology: In FY19, respondents were offered to select up to three priorities, whereas in FY23, they could choose up to five priorities. In addition, two major cross-cutting areas — Economic Growth and Poverty Reduction (#1 and #4 in FY19) — were removed from the list of options in FY23

 FY23: Which areas should the World Bank Group prioritize in its work in North Macedonia to have the most impact on development results in the country? (Choose no more than 5) (N=216)
 FY19: When thinking about how the World Bank Group can have the most impact on development results in North Macedonia, in which sectors do you believe the World Bank Group should focus most of its resources (financial and knowledge services) in North Macedonia? (Choose no more than THREE) (N=170)



Effectiveness of WBG's Sectoral Support

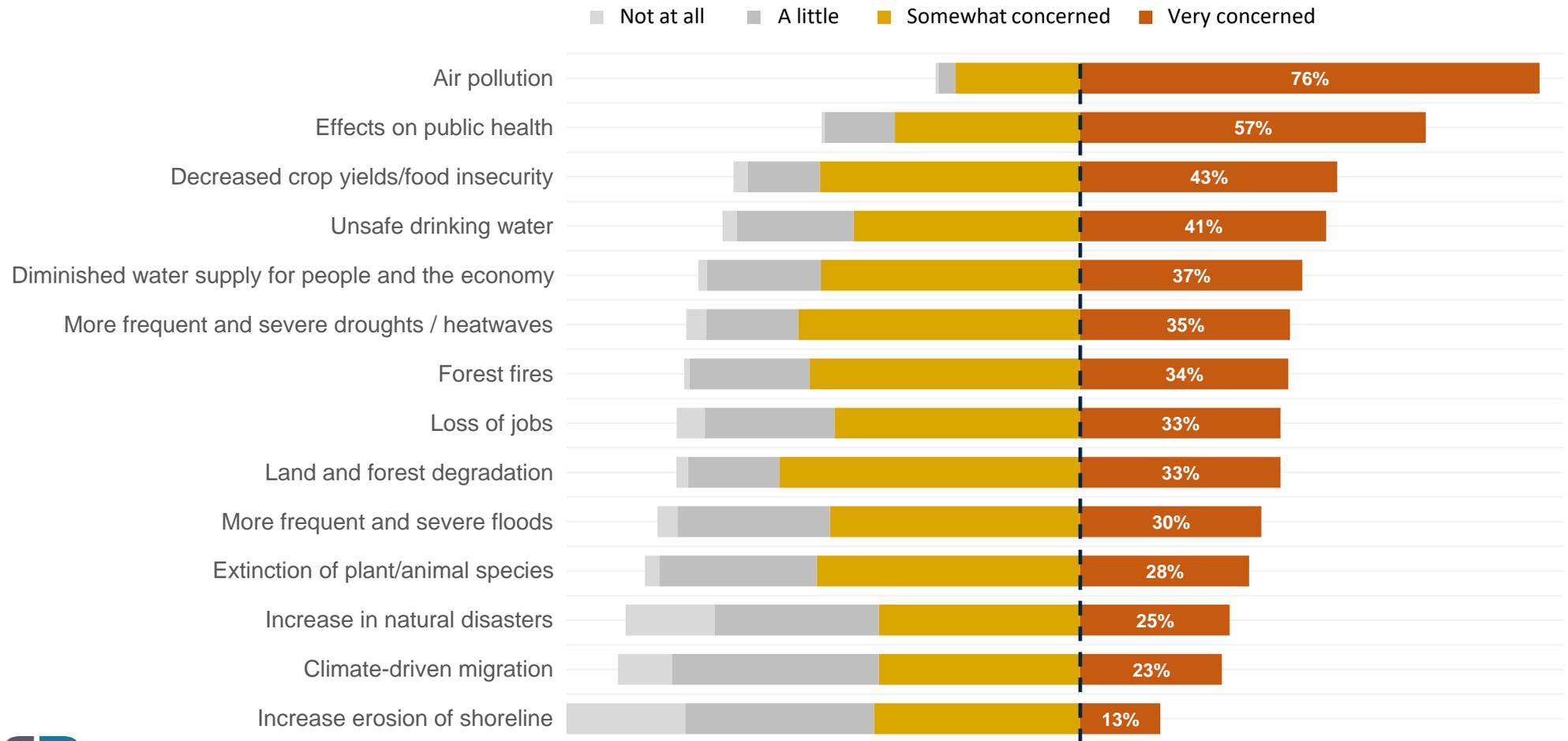
The WBG's work in the areas of **transport** and **gender equity** in North Macedonia received the highest effectiveness ratings. However, the overall ratings of the WBG's effectiveness across several sectoral areas were significantly lower in FY23 compared to FY'19. Most notably, the ratings for effectiveness vis-à-vis **anti-corruption** declined.



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

Air Pollution is the Main Concern for Respondents in Relation to Climate Change

A large majority (76%) of respondents are very concerned about **air pollution** when it comes to the potential impacts of climate change in North Macedonia. Over half (57%) are very concerned about the potential **effects on public health**. **Decreased crop yields, land and forest degradation, and more frequent and severe droughts / heatwaves** are the impacts that respondents are “somewhat concerned” about (43%-50%), whereas increased erosion of shorelines is the issue of least concern (13%).



What is your level of concern for each of the potential impacts of climate change as it affects your country? (N=~212)

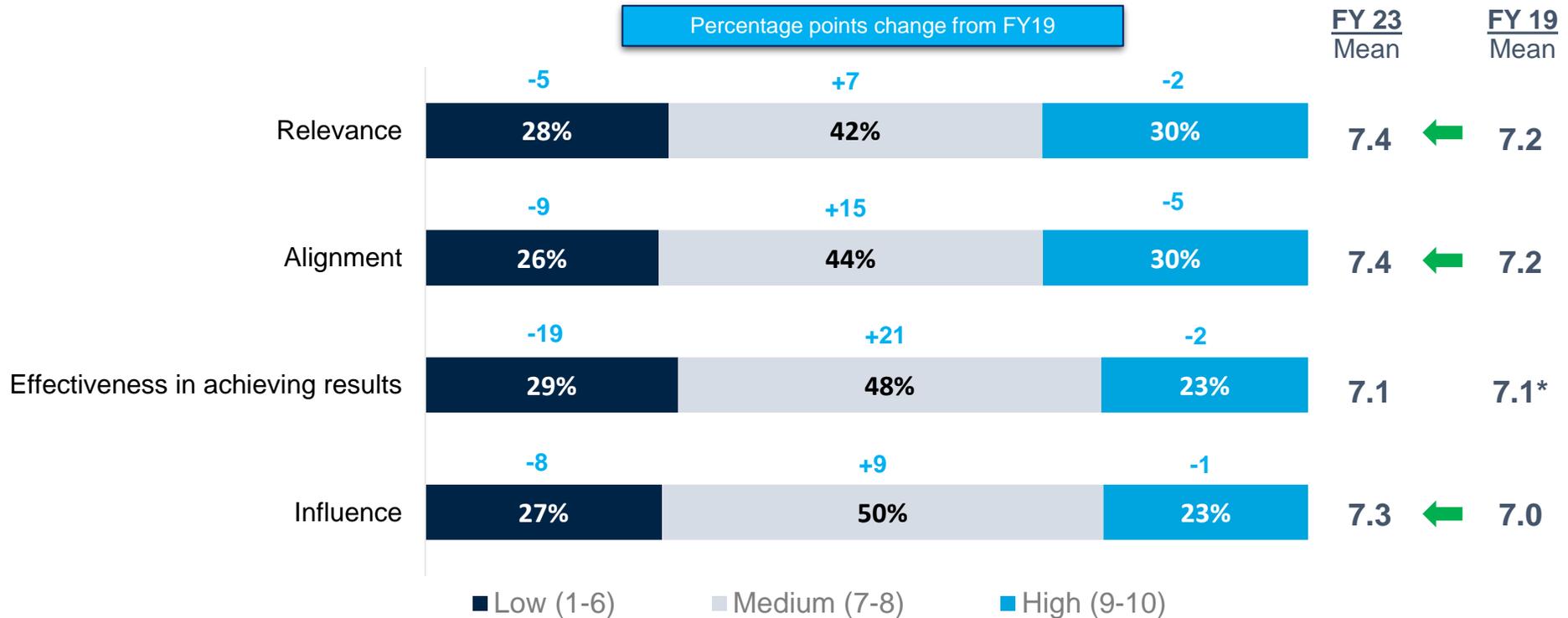
Overall Attitudes toward The World Bank Group

“Engage early with [a] wide range of stakeholders in thematic areas; help support long-term planning; support planning of budgeting and management of public finances; help with value-for-money criteria and cost-benefit analysis; and support capacity for long-term planning and implementation of policies.”

Bilateral / Multilateral Agency Respondent

Key Performance Indicators

In FY23, there was a slight, non-significant improvement across the key indicator questions. About one-third of respondents gave the WBG high ratings (9 or 10 on a 10-point scale) for **alignment with North Macedonia’s development priorities** and for **relevance**. About one-quarter of respondents gave high ratings for the WBG’s **effectiveness in achieving development results**, as well as for its ability to **influence** the development agenda in North Macedonia.



The World Bank Group’s work is aligned with what I consider the development priorities for North Macedonia, Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

How effective has the World Bank Group been in achieving development results in North Macedonia? Scale: 1-10 (1: Not effective at all– 10: Very effective)

To what extent does the World Bank Group influence the development agenda in North Macedonia? 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 North Macedonia?: Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

The World Bank Group currently plays a relevant role in development in North Macedonia.

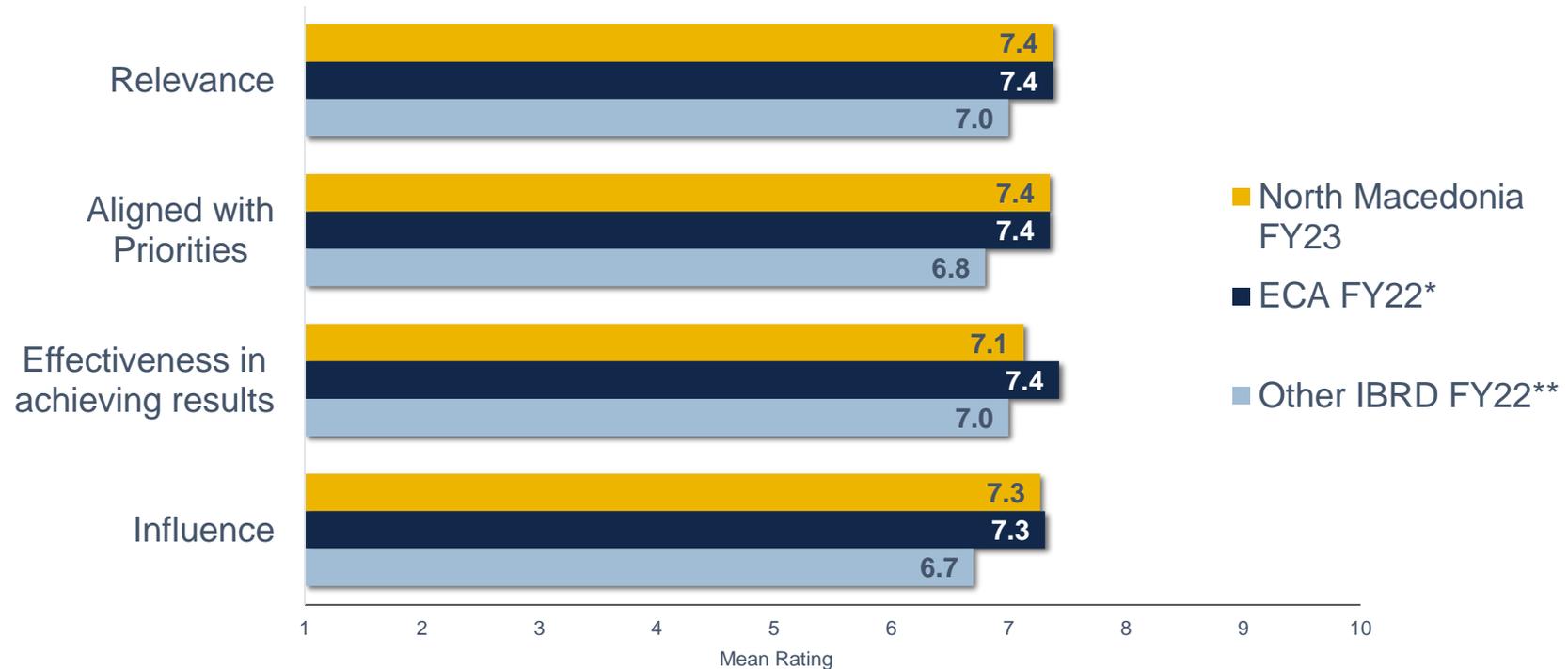
The World Bank Group’s work is well aligned with what I consider the development priorities for North Macedonia.

*A mean score of the two questions asked in FY19: Overall, please rate your impression of the World Bank Group’s effectiveness in North Macedonia. 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 North Macedonia? Scale: 1-10 (1: To no degree at all– 10: To a very significant degree)



Comparison of Key Performance Indicators

The mean ratings for Relevance, Alignment, Effectiveness in **achieving development results**, and Influence in North Macedonia were **significantly higher** than for those in other IBRD countries surveyed in FY22. The ratings are on par with ECA countries surveyed in FY22 (please refer to the footnote for the country lists). The exception is for Effectiveness in **achieving development results**, which was significantly lower in North Macedonia than in other ECA countries.



*ECA FY'22 included: Bulgaria, Tajikistan, Kosovo

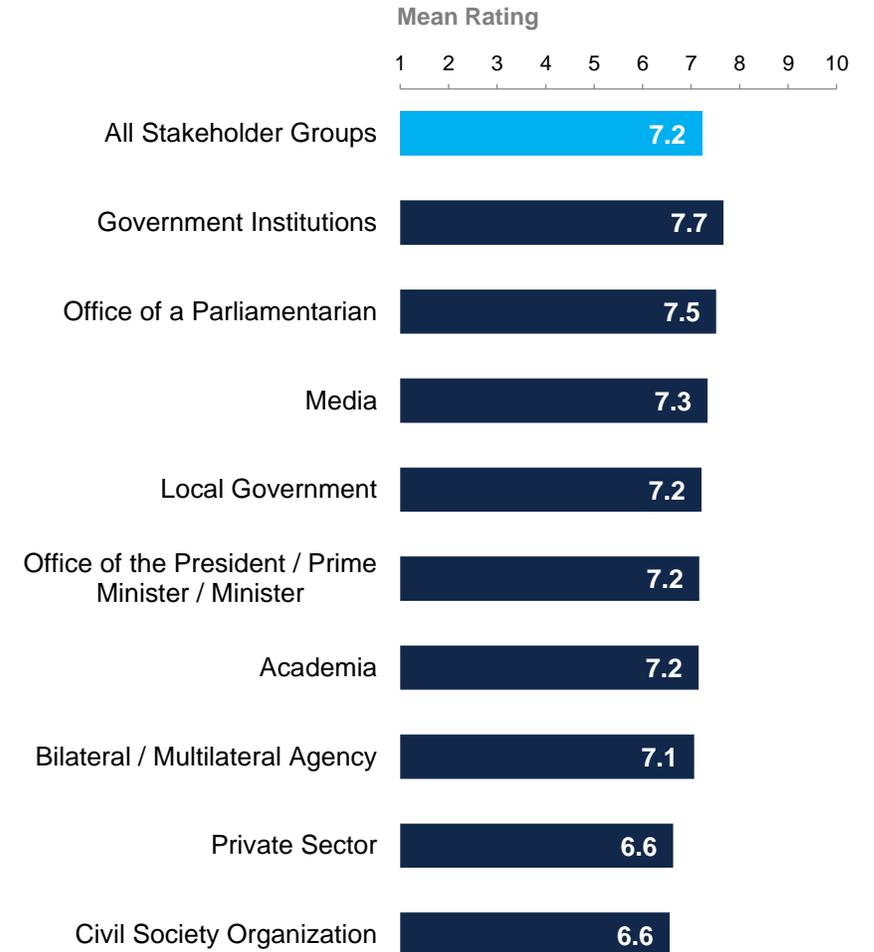
Other IBRD, FY'22 included: Angola, Botswana, Eswatini Mauritius, Thailand, Bulgaria, Bolivia, Colombia, Ecuador, Guatemala, Peru, Jordan

Overall Ratings for Indicator Questions: Ratings for Government Institutions are the Most Positive

Respondents from **government institutions** gave the highest mean ratings for the aggregated responses to the eighteen [Country Opinion Survey \(COS\) indicator questions](#), whereas respondents from civil society had significantly lower mean ratings (see the chart on the right).

Collaboration: Respondents who collaborate with the WBG had significantly higher mean ratings for the aggregated responses to the same eighteen indicator questions compared to respondents who do not collaborate with the WBG:

World Bank collaborators = **7.6**;
Non-collaborators = **6.8**.



World Bank Group's Work and Engagement on the Ground

“Through continuous and effective collaboration with central and local government, civil society, and other international organizations, help improve the quality of services, raise standards, and create value in the country.”

Local Government Respondent

“Creating mechanisms for ongoing social dialogue among the main relevant stakeholders in the country's development processes.”

Academia Respondent



Greatest Value

Financial resources continue to be the most valued activity of the WBG in North Macedonia, along with **advisory services in support of policy design / implementation**.

The rating for the perceived value of the WBG to **bring together different groups** of stakeholders has increased in FY23 (28%), from just 8% in FY19. It is particularly valued by respondents from local government (43%) and academia (44%).

However, the rating for **Capacity building and training*** decreased from 41% in FY19 to 27% in FY23.

Regarding the qualitative comments, respondents called for easier access to financing and for more financing for big capital projects, as well as for direct financing of local organizations and non-governmental organizations (NGOs):

“To simplify the procedures for obtaining grants and to reduce interest rates on loans for investments in infrastructure projects.”

Local Government Respondent

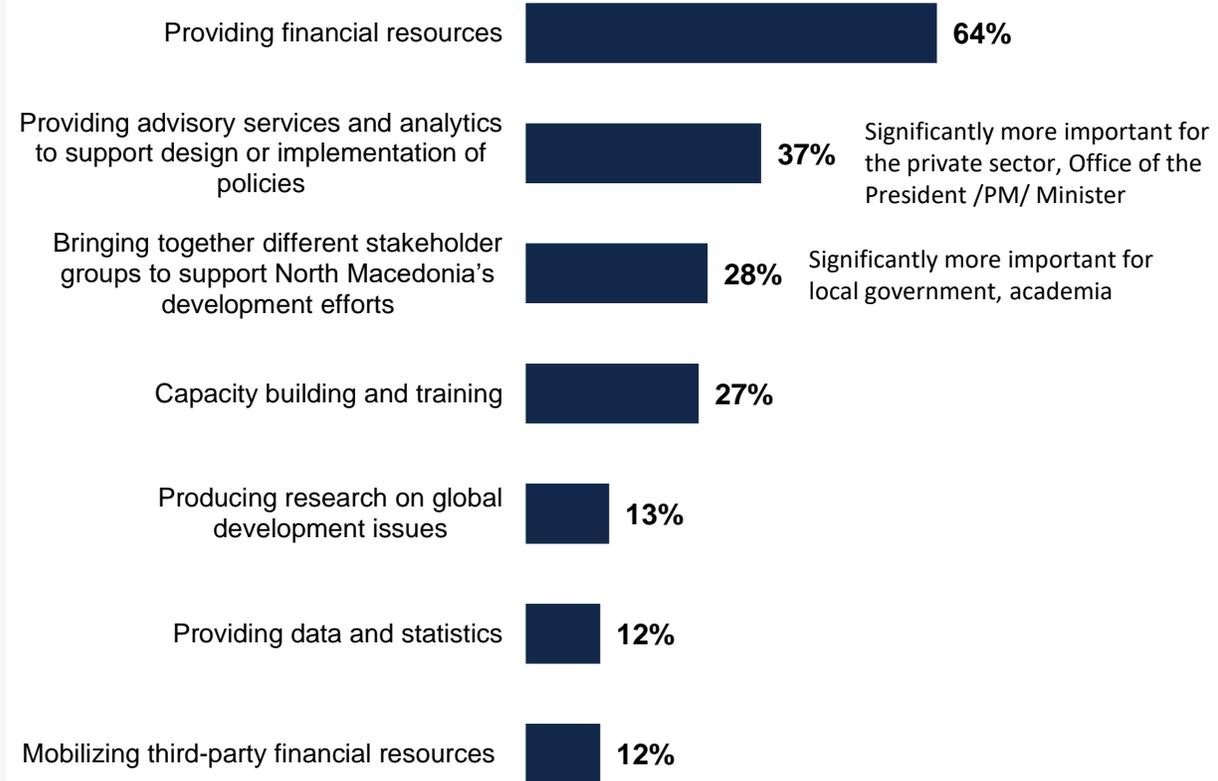
“Long-term loans for capital investments with low interest rates.”

Respondent from an Office of a Parliamentarian

“To provide grant funds to civil society organizations in local communities (outside of Skopje) that work directly with local authorities. To avoid centralization and allow citizens and local authorities to make their own decisions without imposed ideas.”

Local Government Respondent

% of Respondents



The WBG as a Development Partner

The WBG is seen as a **responsive, long-term partner** in North Macedonia. Perceptions of the institution’s **flexibility when circumstances change** have significantly improved compared to the FY19 results. They are now on par with other ECA countries surveyed in FY'22^.

Perceptions about the WBG as a long-term partner are significantly higher in North Macedonia compared to other ECA countries.

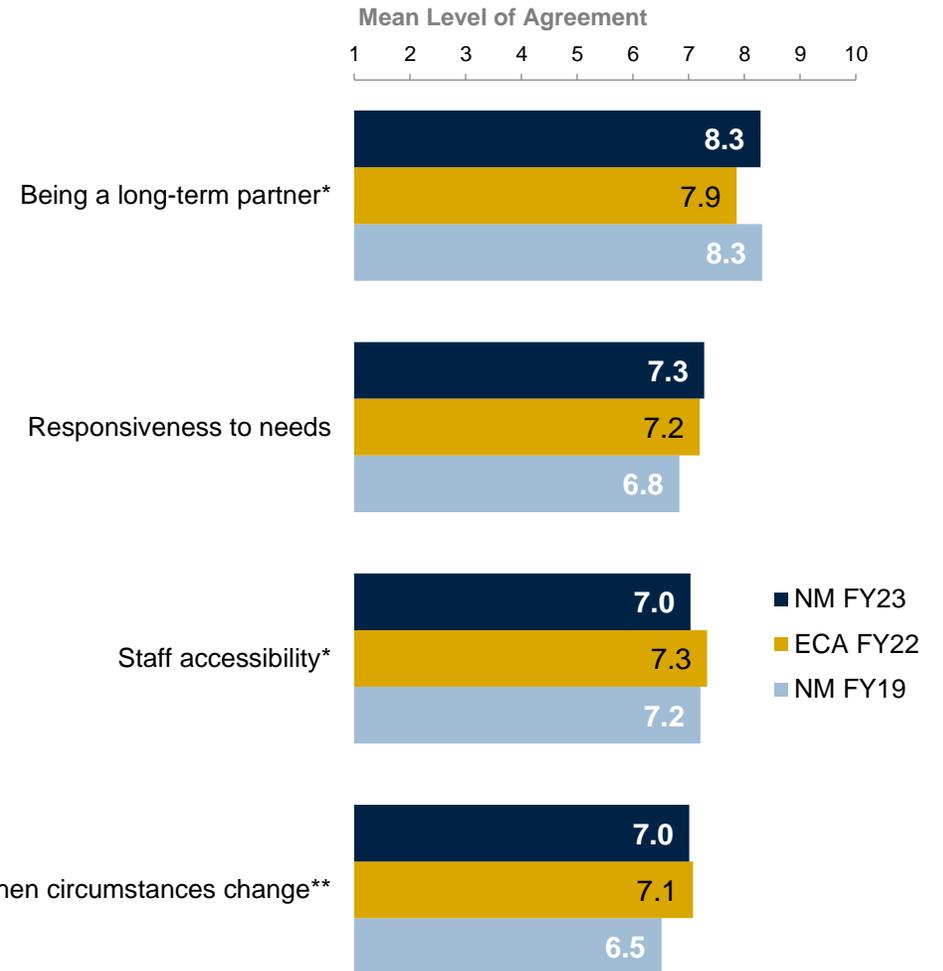
The improvement in perceptions of **responsiveness** is close to a significance level (p-value = 0.06) and is also on par with other ECA countries.

“To continue to be a partner to North Macedonia as it has been until now.”

Government Institution Respondent

“Increase employee [WBG staff] availability.”

Government Institution Respondent



* Significantly different between NM FY23 and ECA FY'22

** Significantly different between NM FY23 and NM FY19



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

^ ECA FY'22 included: Bulgaria, Tajikistan, Kosovo

The WBG Should Collaborate More with the National and Local Governments and the Private Sector

A majority of respondents suggest that the WBG should collaborate more with the **national government** (60%), **local government** (53%), and the **private sector** (45%), which is consistent with the FY19 findings.

However, respondents from various stakeholder groups called for more collaboration as well:

“We would welcome stronger collaborative ties with the United Nations.”

Bilateral / Multilateral Agency Respondent

“Direct contact with local government and NGOs and other organizations, [including] local civic association[s] (community forums).”

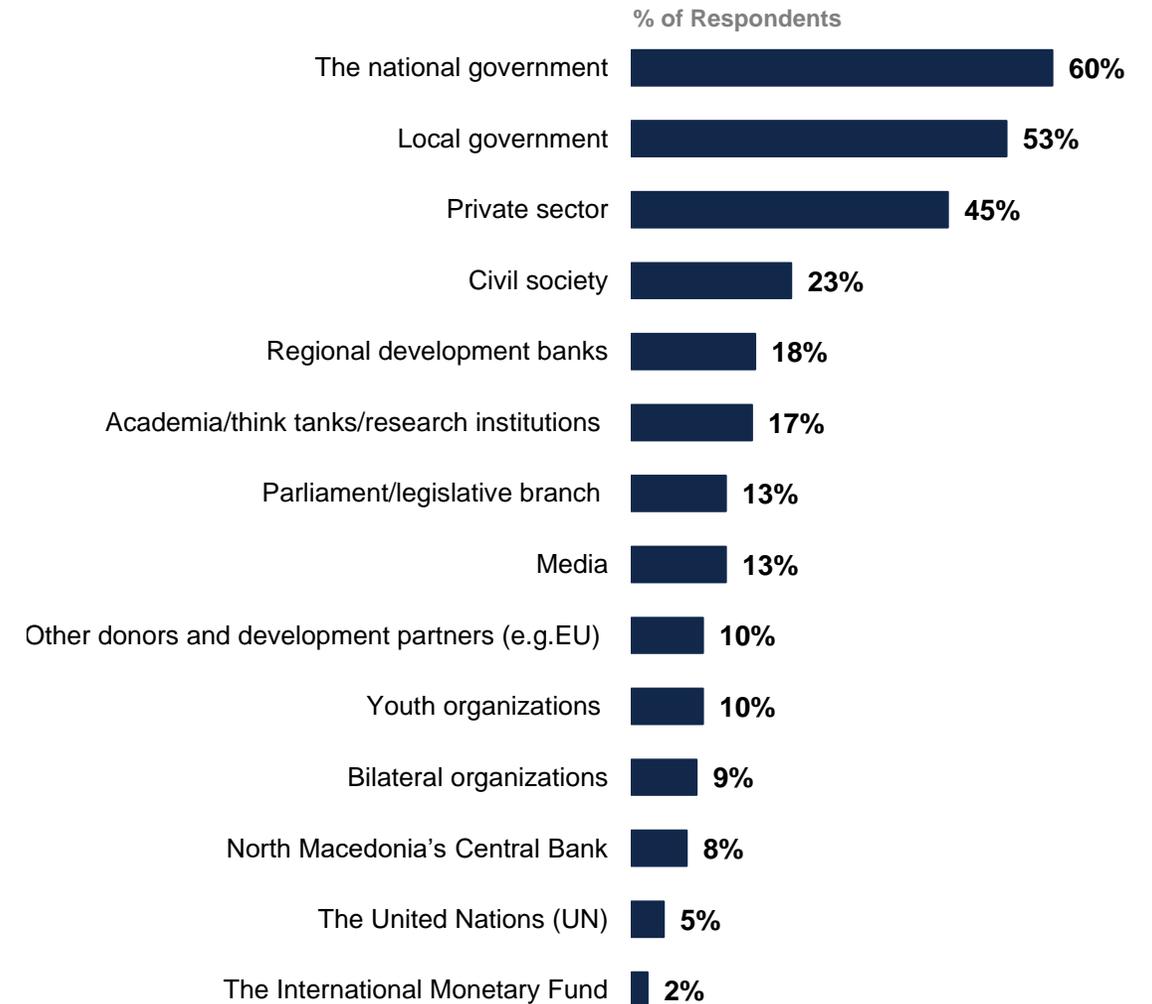
Local Government Respondent

“Greater and more frequent collaboration with academic institutions”

Academia Respondent

“Greater collaboration with NGOs, [the] media, as well as greater control of cooperation with central and local government.”

Media Respondent



Note: EU = European Union

Which THREE of the following groups should the WBG collaborate with more in North Macedonia? (Choose no more than 3) (N=216)

WBG as a Development Partner: Collaborating with Various Stakeholder Groups

The WBG received the highest mean ratings for its collaboration with the regional development banks, the national government and the Central Bank of North Macedonia (mean = 7.3),

The FY23 mean rating for collaborating with the national government has dropped significantly compared to FY19.

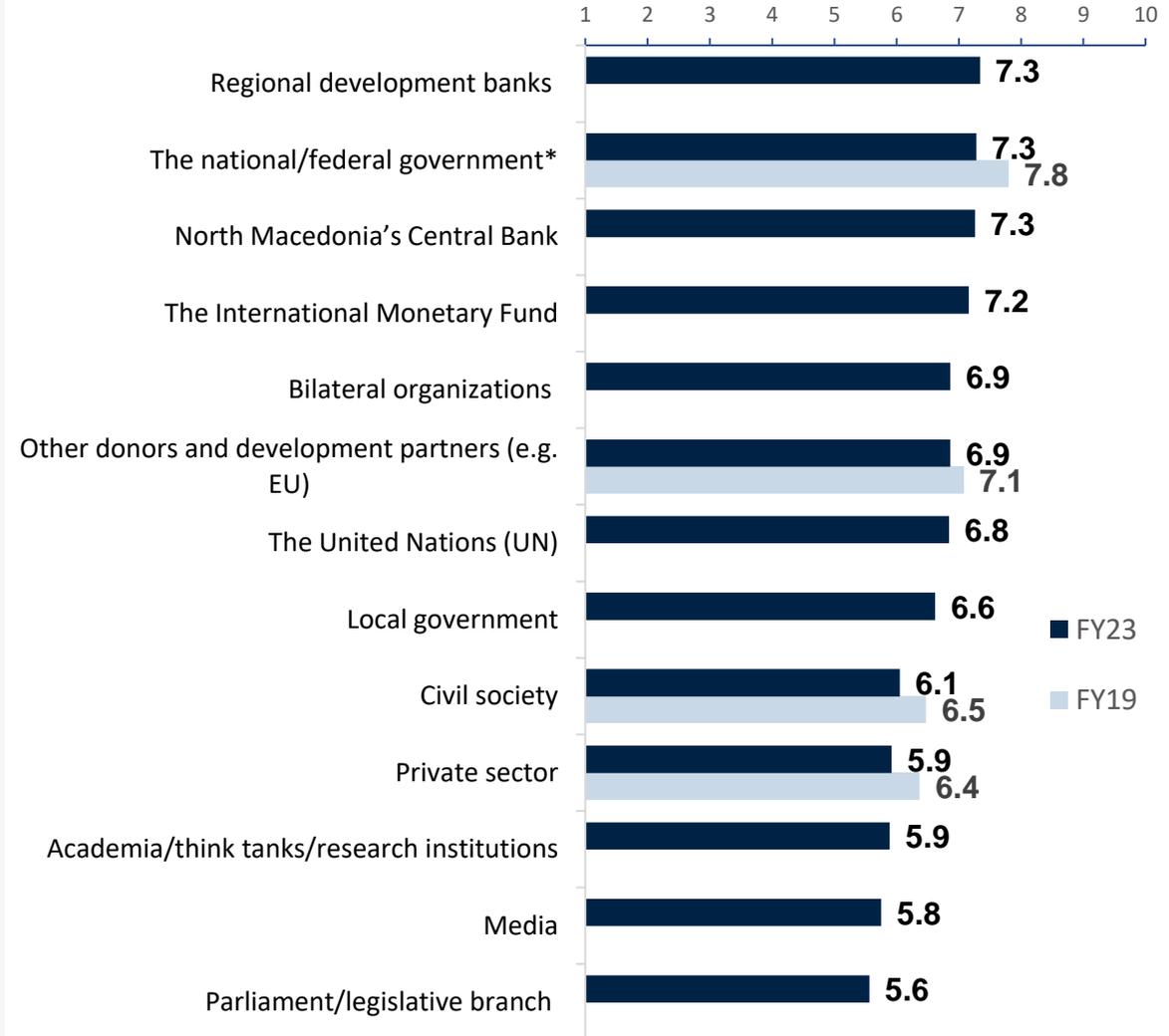
The WBG receives relatively lower ratings for its collaboration with other key stakeholder groups, particularly local government, civil society, and the private sector. Respondents from bilateral / multilateral agencies were the most critical of the WBG’s collaboration with various stakeholder groups (mean across all groups = 5.5).

“Involvement of relevant stakeholders in decision-making processes. Coordination with other donors and with the central government.”

Government Institution Respondent

“More discussions [are needed] with middle management and individuals involved in creating and monitoring sectoral policies, and with those involved in policy coordination.”

Government Institution Respondent



To what extent is the WBG an effective development partner in North Macedonia, in terms of collaborating with the following groups: (1-Strongly disagree, 10-Strongly agree)

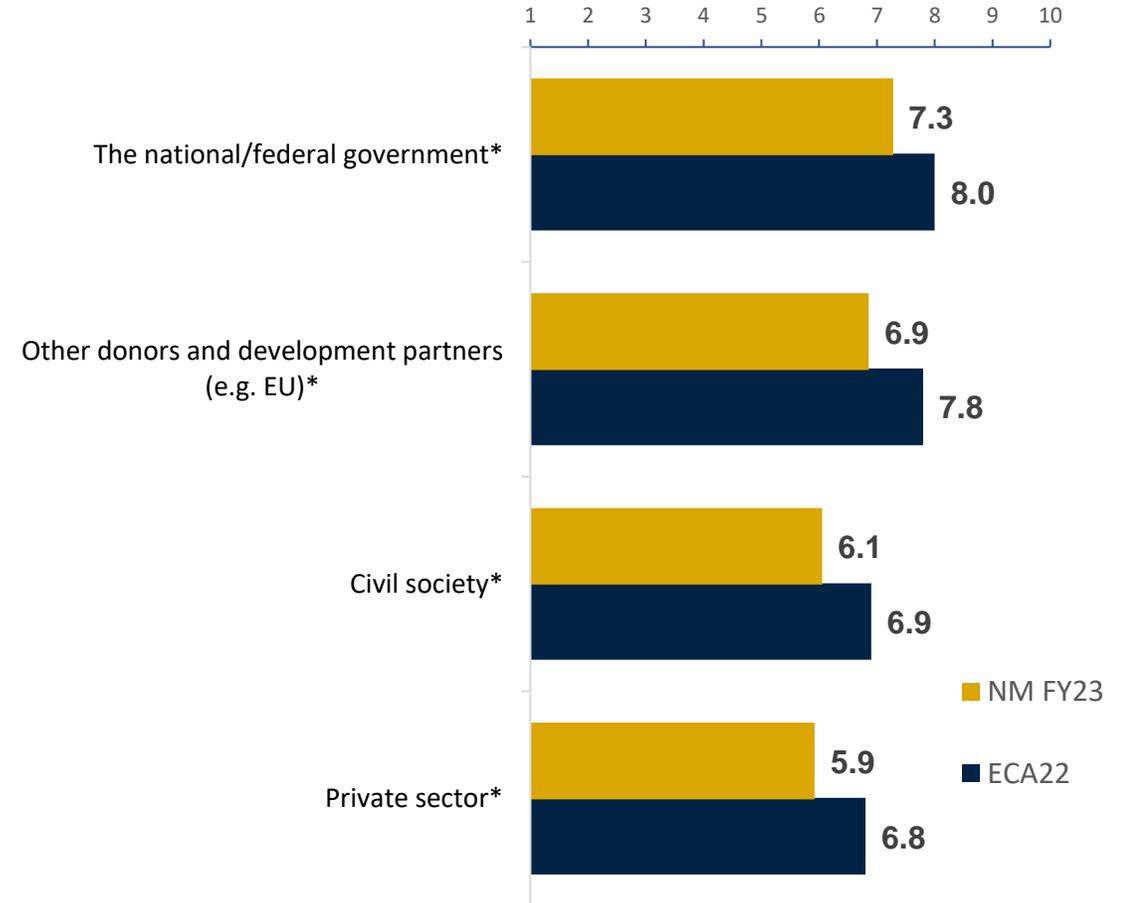
WBG as a Development Partner and Collaborator

Compared to other ECA countries surveyed in FY22**, respondents in North Macedonia ranked the WBG significantly lower on its collaboration with all key stakeholder groups.

“Increasing collaboration between the World Bank and local governments will increase efficiency and implementation of planned investment projects, ... [whereas] local governments, with their support, can contribute to improving the lives of citizens and achieving the planned program. On the other hand, in addition to local governments, the World Bank should deepen [its] collaboration with the private sector, [especially] in terms of greater technical support, advisory services and training, as well as the ... simplification of procedures, applications, and access to various programs.”

Private Sector Respondent

WBG as development partner in collaboration with ...



* Significantly different between NM FY23 and ECA FY'22



To what extent is the WBG an effective development partner in North Macedonia, in terms of collaborating with the following groups: (1-Strongly disagree, 10-Strongly agree)

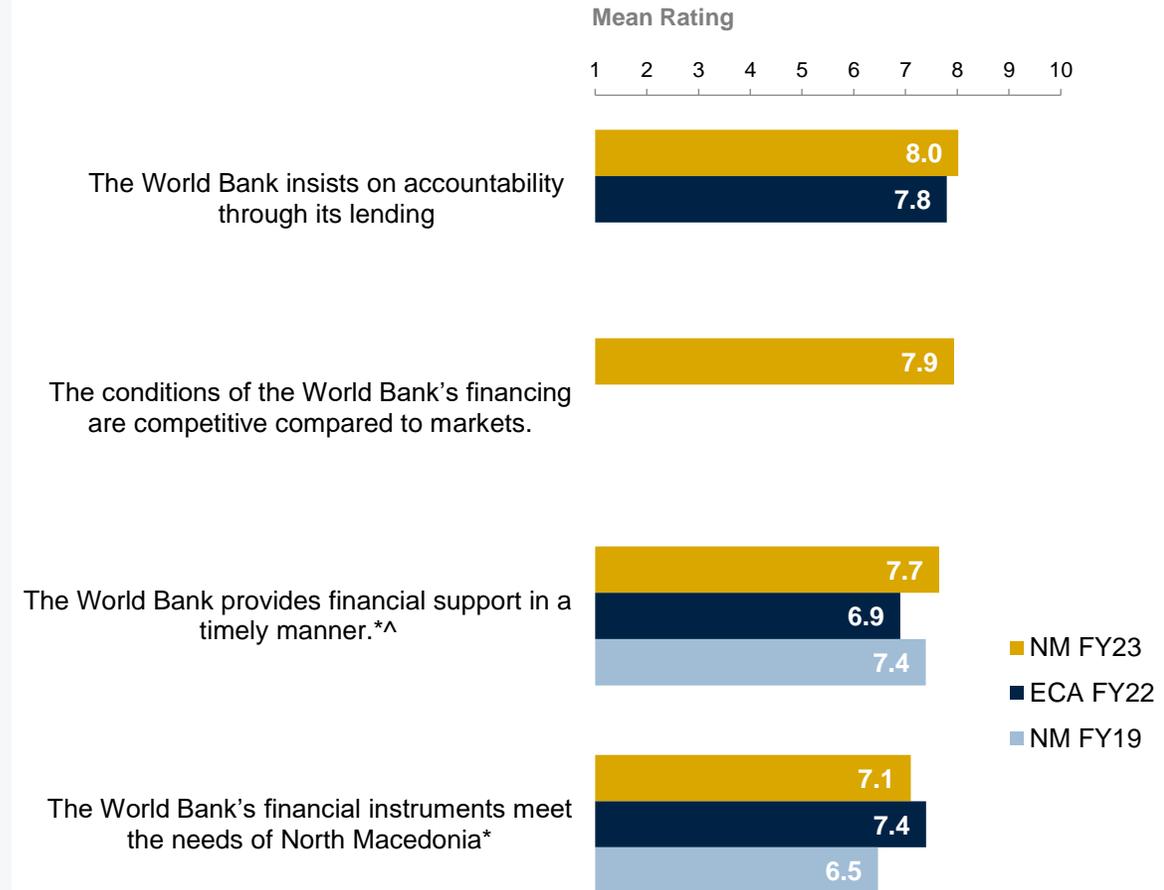
** ECA FY22 included: Bulgaria, Tajikistan, Kosovo

WBG's Financial Instruments

Respondents gave the highest ratings for the WBG's insistence on **accountability** through its lending process, as well as for the **competitiveness** of its financing conditions.

Ratings for the **timeliness** of its financial support have improved compared to FY19. Indeed, they are significantly higher than in other ECA countries surveyed in FY22.**

Ratings regarding the ability of the WBG's financial instruments to **meet the needs** of North Macedonia have improved significantly compared to FY19, although were still significantly lower than those in other ECA countries.



* Significantly different between NM FY23 and ECA FY'22



To what extent do you agree/disagree with the following statements about the World Bank Group in North Macedonia?

Scale: 1-10 (1: Strongly disagree– 10: Strongly agree)

^ In FY'22 and in FY19, the option was "The World Bank Group's approvals and reviews are done in a timely fashion"

** ECA FY'22 included: Bulgaria, Tajikistan, Kosovo

World Bank Group's Knowledge Work and Activities

“The World Bank's competitive advantage is [in its] analytics, and this should be used more and put ... [at the] disposal ... [of] other development partners...”

Bilateral / Multilateral Agency Respondent

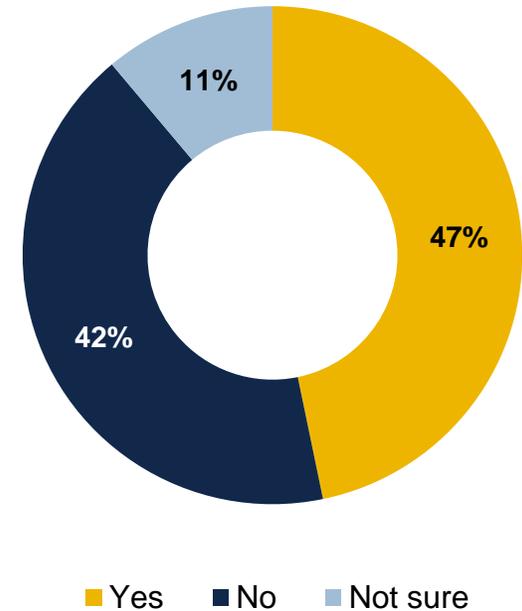
“Continuous independent research should be conducted, followed by joint action with institutions to take concrete steps in a specific area, using experts who have proven themselves in these fields with real-world experience.”

Government Institution Respondent

WBG's Knowledge Work

Almost half of the respondents (**47%**) report using the WBG's advisory services and analytical work (knowledge work). Responses differed significantly by stakeholder group. Whereas 83% of respondents from the Office of the President, Prime Minister, Minister and 77% of respondents from government institutions report using the WBG's knowledge work, **only 15% of respondents from the private sector** report using it. Furthermore, just about a quarter of respondents from Civil society, the Office of a Parliamentarian, and Local government report using the WBG's knowledge work.

Use of the WBG's advisory services and analytics



WBG's Knowledge Work (continued)

Almost all stakeholder groups, **except for civil society**, tend to give rather high rankings for the quality of the WBG's knowledge work in North Macedonia. They suggest that they will keep using the WBG's advisory services and analytics in the future.

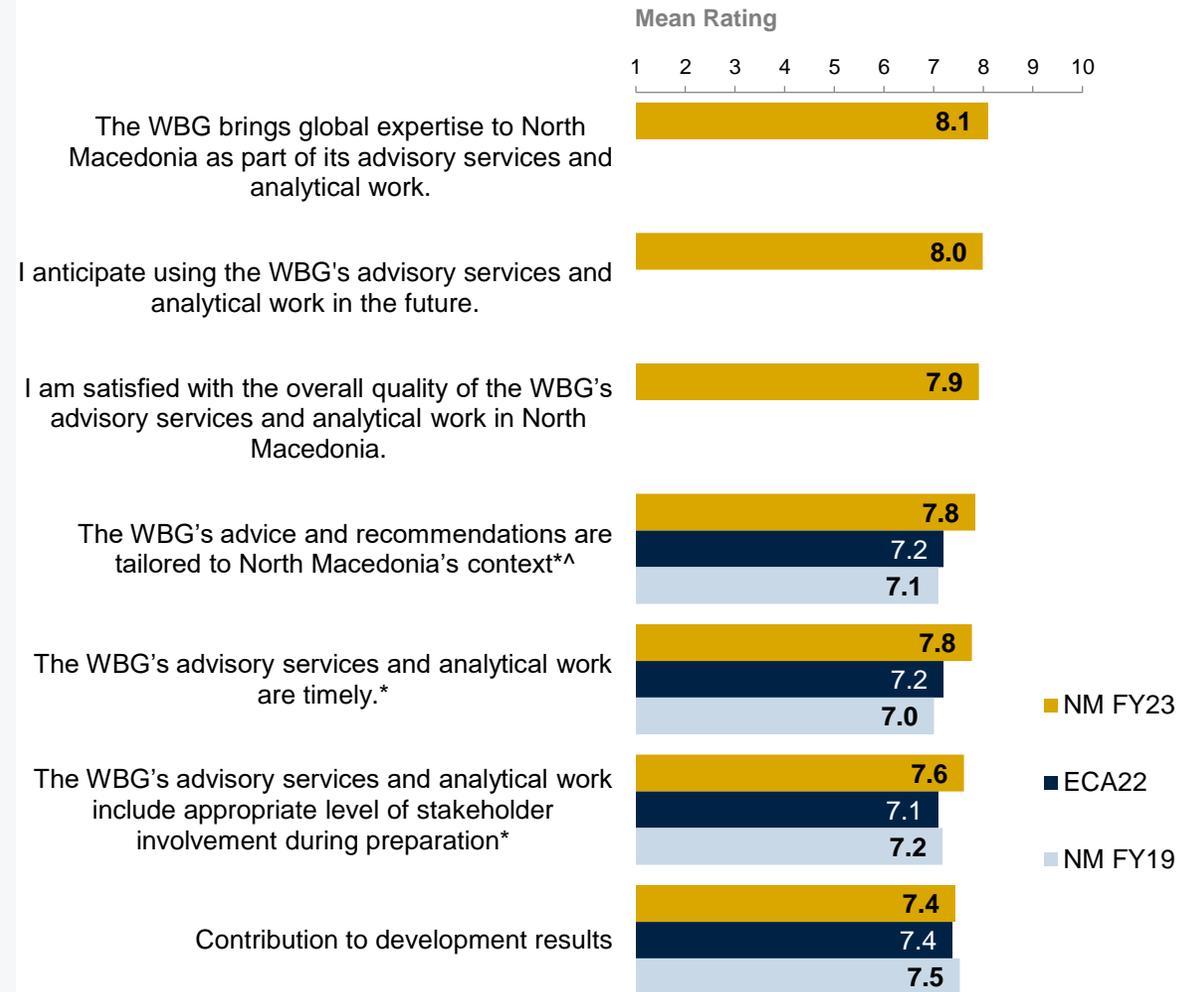
Ratings in FY23 have improved for comparable questions (please see the chart on the right). They were significantly higher than those in other ECA countries surveyed in FY22.**

"[The WBG should] include as many local experts as possible in their analyses and research, because only local experts can bring the local context. In order for the services of local experts to be more effective and of higher quality, activities need to be linked to specific reforms and policies ... to be implemented, rather than just analyzed."

Civil Society Respondent

"...Specific policy proposals (instead of general ones)..."

Academia Respondent



* Significantly different between NM FY23 and ECA FY'22



To what extent do you agree/disagree with the following statements? 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 North Macedonia?
 Scale: 1-10 (1: Not significant at all– 10: Very significant)

[^] In FY19, this option was "Are adaptable to Macedonia's specific development challenges and country circumstances"

** ECA FY'22 included: Bulgaria, Tajikistan, Kosovo

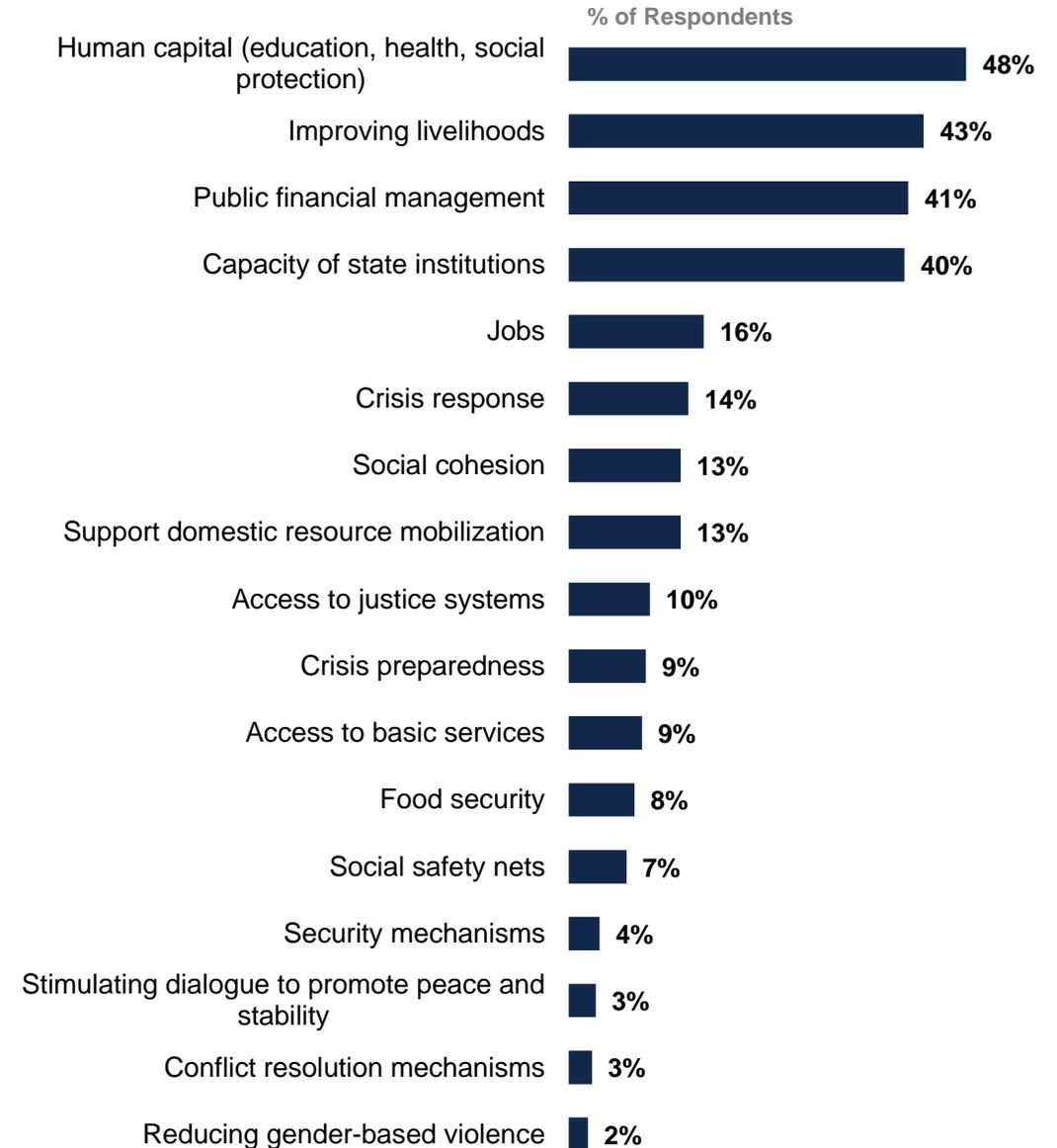
The Future Role of the World Bank Group in North Macedonia

“[The WBG should support] radical reforms in education and healthcare, in short, in human capital.”

Academia Respondent

The WBG Should Take the Lead in Human Capital, Improving Livelihoods, Public Financial Management, and Building of Capacity in State Institutions

When asked about the areas where the WBG should take a lead among other development partners in North Macedonia, respondents identified Human capital, the Improvement of livelihoods, Public financial management, and the Capacity of the state institutions as the key focus areas for the WBG.



Which THREE areas below would benefit most from the World Bank Group playing a leading role among international partners in North Macedonia? (Choose no more than 3) (N=216)

What the World Bank Group Could Do to Help Increase its Effectiveness in North Macedonia

In their responses to the qualitative question about what the WBG could do to help increase its effectiveness in North Macedonia, about **46%** of respondents identified a number of areas: **32%** commented on the WBG's operational work; around **14%** stressed the importance of collaboration, and **7%** commented on the communication aspects of the WBG's work.

Focus areas: Respondents highlighted some of the key focal areas that they consider important for the WBG. These included (i) **human capital**—particularly support for youth; (ii) **public sector governance** – including support for long-term planning, public resource management, and anti-corruption; (iii) support for effective institutions – judiciary and government regulators; (iv) support for **capital projects** and **infrastructure** building and maintenance; (v) **sustainable development**, environmental protection and coping with the effects of climate change; (vi) **energy**, energy efficiency, and water treatment technologies.

“Support for the financial functioning of the state, better budgeting, and improvement of systems for education, health, and child protection. Support for the development of human capital and continuous measurement of results and influence on their improvement is the most important work that will provide the foundation for a better state in the future.”

Civil Society Respondent

“Conditioning of credit loans to North Macedonia with partial/full investment in sustainable projects that are part of a long-term development program, expressed through appropriate indicators of success.”

Government Institution Respondent

“...Resources should be directed toward public finance and improving many laws in the financial sector. Too many laws, too much overlap, too little integrity. We are a legalistic society, with very bad laws and no code and integrity. Funds must be found for regulators. Not a single regulator in the financial sphere is functioning properly (except maybe the National Bank of Macedonia), and there are no public finances... ...A quality business climate [is lacking]... [We cannot have] a fair society without quality, professional, and ethical regulators....”

Private Sector Respondent



In your opinion, what is the most important thing the World Bank Group could do to help increase its effectiveness in North Macedonia? (Please be specific) (N=215)

What the World Bank Group Could Do to Help Increase its Effectiveness in North Macedonia (continued)

Operations: Respondents stressed the importance of transparency and accountability in WBG-funded projects, calling for acknowledgement of corruption, as well as the need for closer monitoring and evaluation of the results. Respondents welcome more financing (including direct financing), easier access to funds and a reduction in bureaucratic barriers. Some suggested that the Bank should share more data and information about the economy and ecology of the country and ensure the uptake of its knowledge work.

“...Deadlines for construction/implementation must be respected, and supervision must be accounted for to prevent corruption and ensure that the effects of the projects are truly felt. Supervision is a crucial tool that must be appropriately strengthened and supported.”

Local Government Respondent

“Monitoring the implementation of projects to improve and react in a timely manner when difficulties arise [is important].”

Government Institution Respondent

“Greater transparency [is needed] in operations and goals.”

Academia Respondent

“Implementation of the conclusions and advice arising from the analyses [is important and must be] made. Implementation of projects [should include a role for] ... the non-governmental sector in connection with the strategies and policies of the government. [The] involvement of the private and non-governmental sector in the implementation of municipal projects financed by the World Bank [is necessary].”

Government Institution Respondent

Collaboration and Communication: Responses mainly focused on the need for more effective collaboration with various stakeholder groups as well as effective communication with the media and the public. These responses are for the most part covered in respective sections of this report.



Communications and Outreach

“Increase media coverage of the projects.”

The Office of the President / PM / Minister Respondent

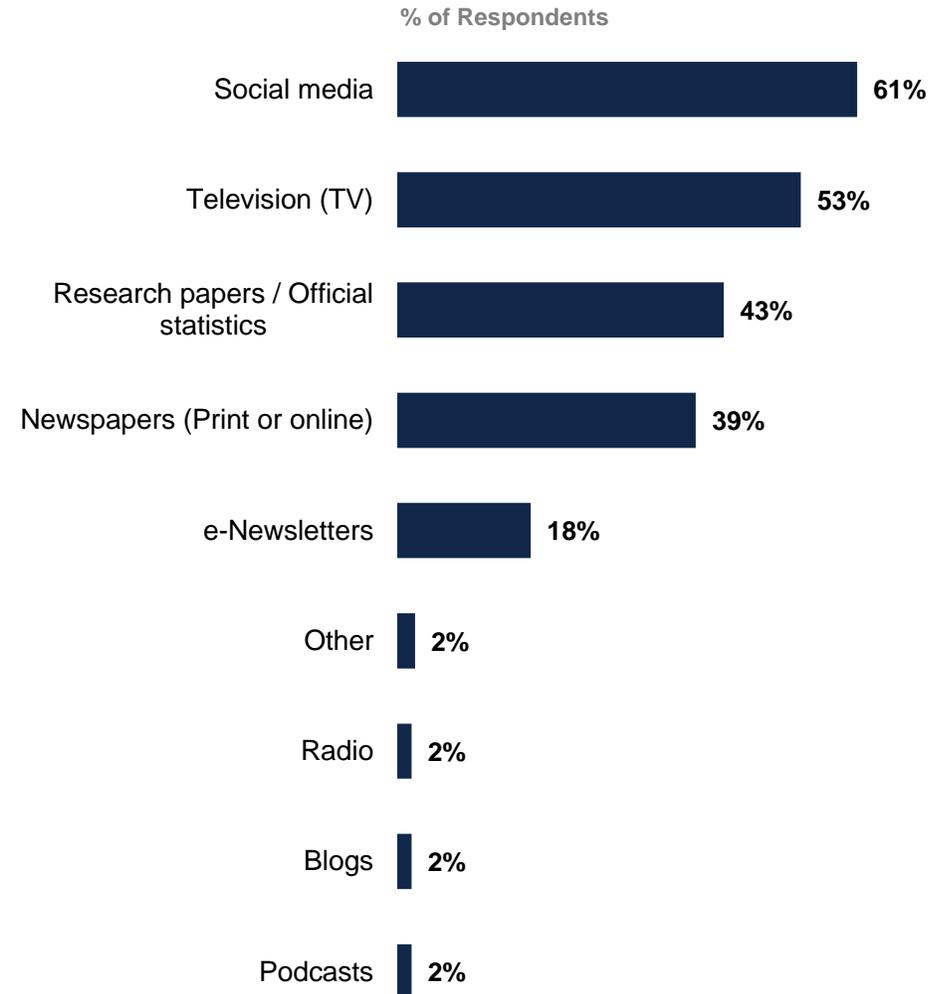
“The World Bank should communicate better with the public in Macedonia.”

Media Respondent

General Information Sources

Respondents report using a variety of sources to obtain information about socioeconomic development issues in North Macedonia, but a majority relies on **social media (61%)** and **television (53%)**.

There were significant differences among stakeholder groups. Respondents from bilateral/multilateral agencies preferred research papers (77%) and newspapers (65%). Respondents from academia – preferred research papers (67%) and e-Newsletters (39%). Government institutions (67%), local government (70%), and the private sector (70%) had the strongest preference for social media.



Preferred WBG Information Sources

Respondents report a preference for a variety of channels when it comes to receiving information about the WBG and its work. The WBG website and events continue to be most preferred, but other channels are almost of equal importance for some stakeholder groups. Thus, respondents from bilateral/multilateral agencies and academia prefer publications (over 50%). Respondents from the private sector and civil society prefer social media (over 52%). Respondents from local governments prefer direct contacts with the WBG staff (57%).

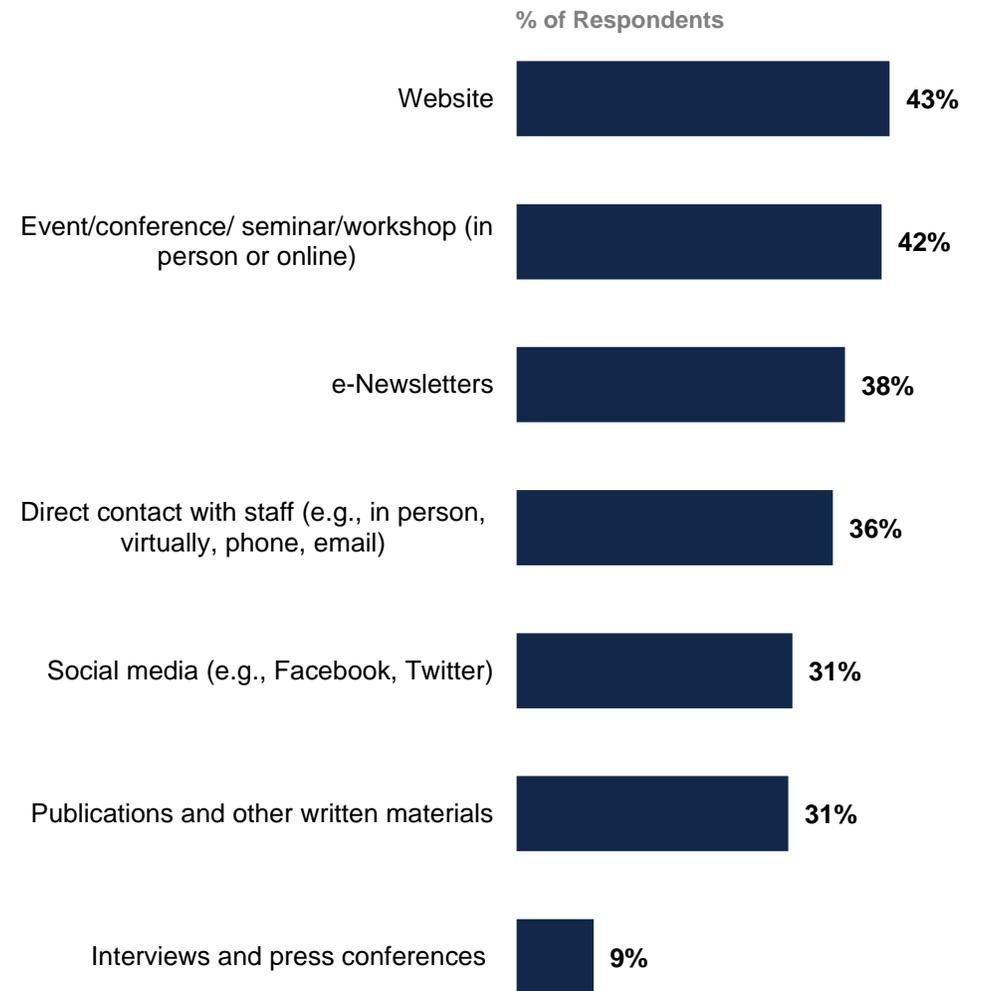
Interviews and press conferences were mostly important for respondents from the media (54%).

“More contacts with the media in the format of organized briefing meetings or initiatives for the development and analysis on [various] topics [is needed].”

Media Respondent

“More precision, specificity, and directness when answering journalist questions, clear explanations of the missing information.”

Media Respondent

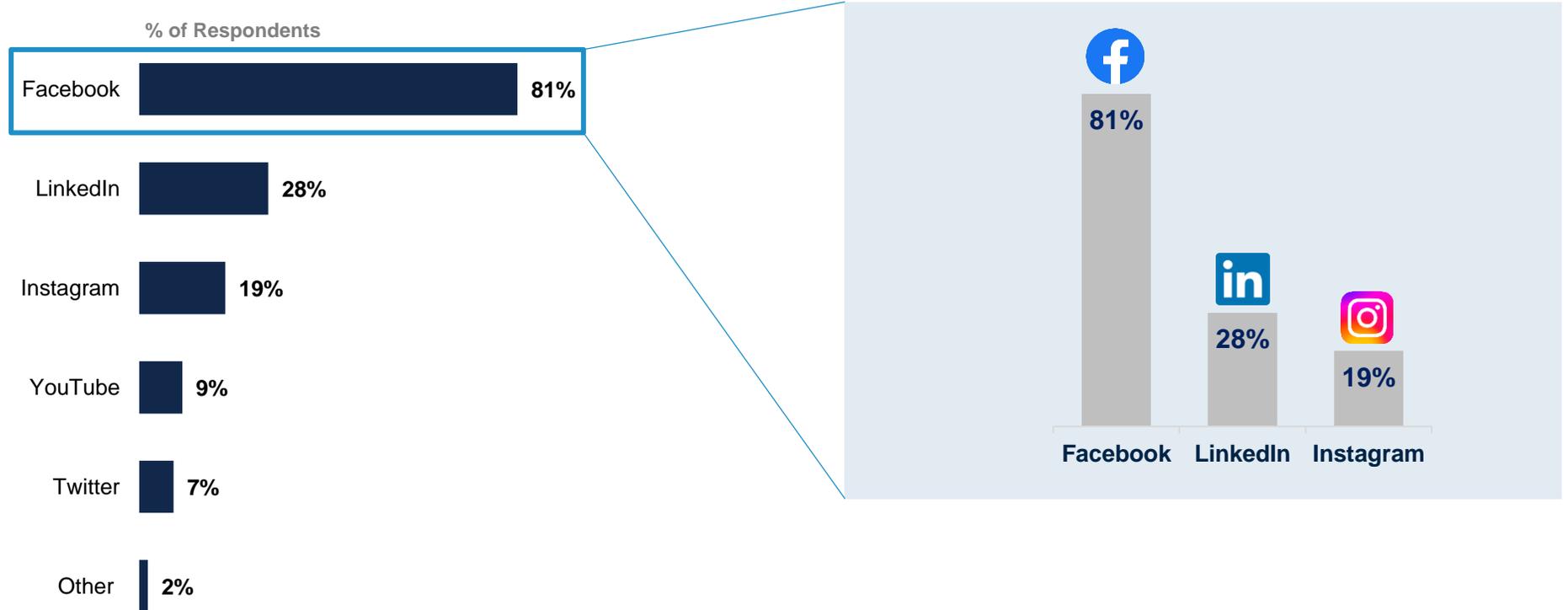


How would you prefer to receive information about the World Bank Group and its work? (Choose no more than 3) (N=216)

Recent interactions with the WBG

A total of **55%** of respondents recall hearing or seeing something about the WBG in the last 30 days.

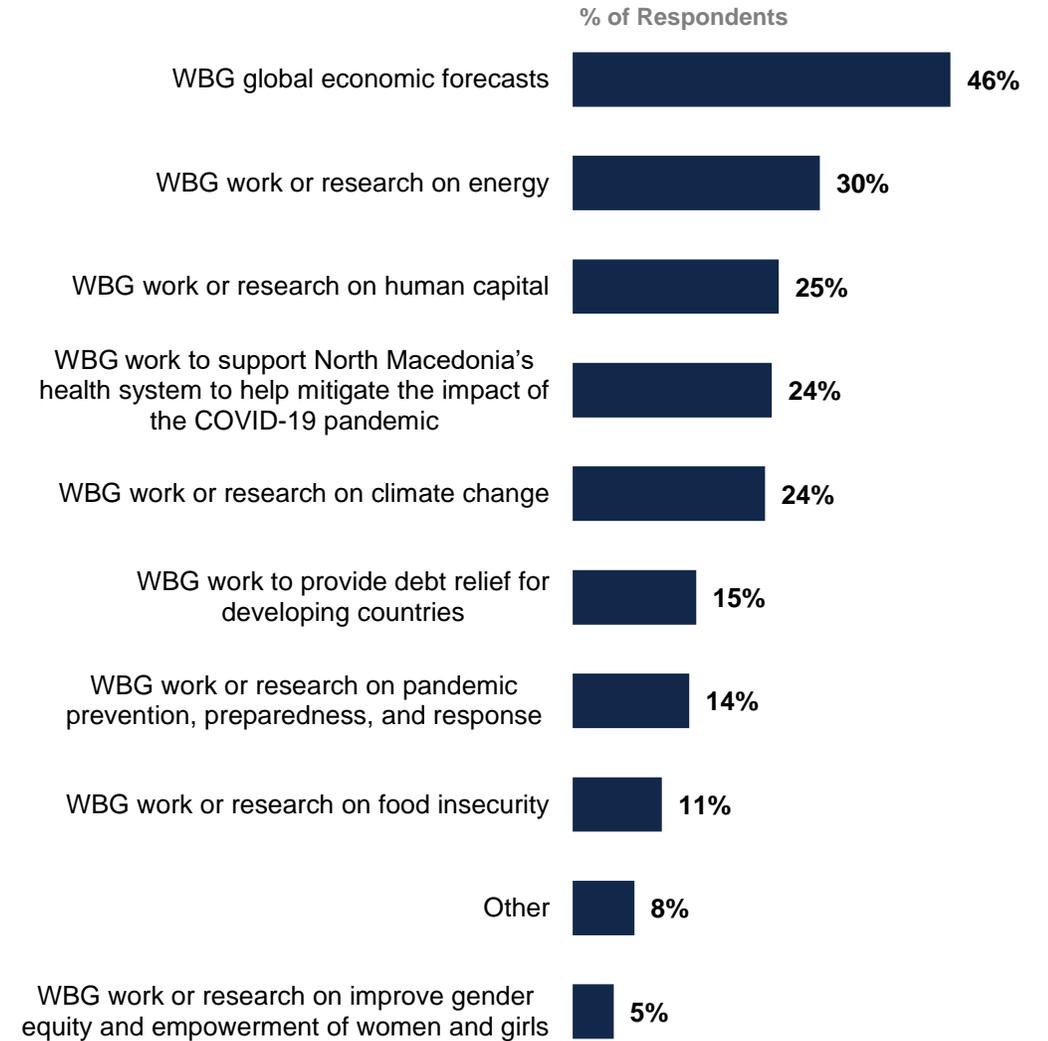
Most respondents (45%) report seeing that information on **social media** channels and on **television** (40%). Among those who selected “Social media”, most respondents report seeing something on **Facebook** (81%), followed by **LinkedIn** (28%).



Where do you recall seeing or hearing this information? (Check all that apply) (N=119)
 What social media platforms do you recall seeing this information on? (Check all that apply) (FY23 N=54)

Topic Recall in the Last 30 days

Global economic forecasts (46%) and the **WBG's work or research on energy (30%)** were the top two topics that respondents recalled seeing or hearing about in relation to the WBG in the last 30 days.



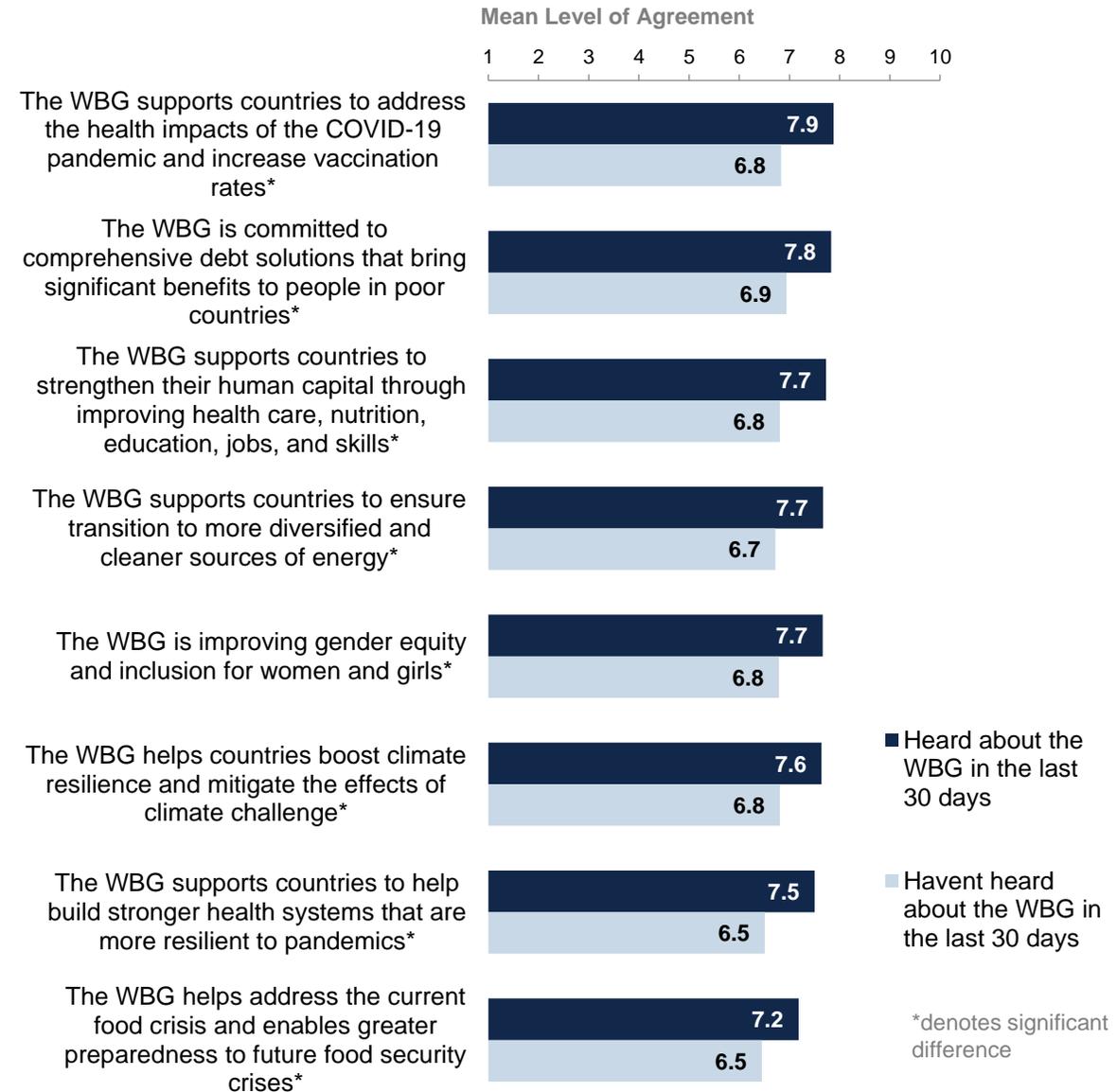
What topics were included in what you saw or heard? (Check all that apply) (N=119)

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** to the key areas of the WBG's work (see the bar chart on the right). They also report a significantly higher perceived level of familiarity with the WBG (**mean = 7.4**), compared to those who reported not hearing or seeing anything about the WBG recently (**mean=6.0**).

Those who collaborate with the WBG, were significantly more likely to recall messages about the WBG (73%) than those who do not collaborate (27%). There were significant differences among stakeholder groups. **Respondents from civil society, the private sector, and the Office of the President / Prime Minister / Minister** were the least likely to recall messages related to the WBG (~30% in each of these groups).

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 and knowledge work (read research papers, etc.) are also more likely to hold more positive views about the WBG's work.

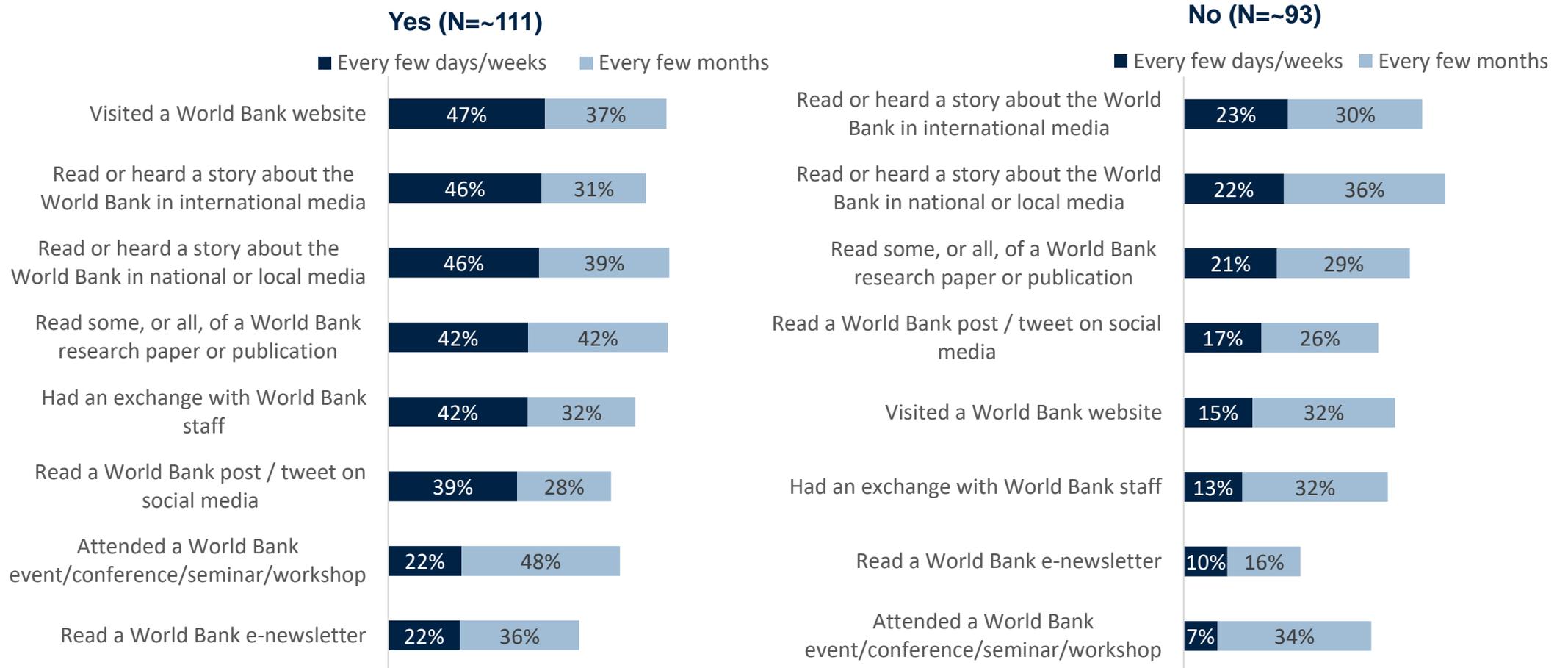


Do you recall seeing or hearing anything about the WBG in the last 30 days?
 To what extent do you agree with the following statements: Scale: 1-10 (1: To no degree at all – 10: To a very significant degree)

Frequency of Engagement Matters for Message Recall

Respondents who recall hearing something about the WBG in the last 30 days tend to have more frequent interactions with the institution **across all channels**, including **personal interaction with the WBG staff**. They are also more likely to **visit the WBG’s website**, its **social media channels**, and/or read a **research paper**. Both groups are very likely to encounter information about the WBG in the media, both international and local.

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



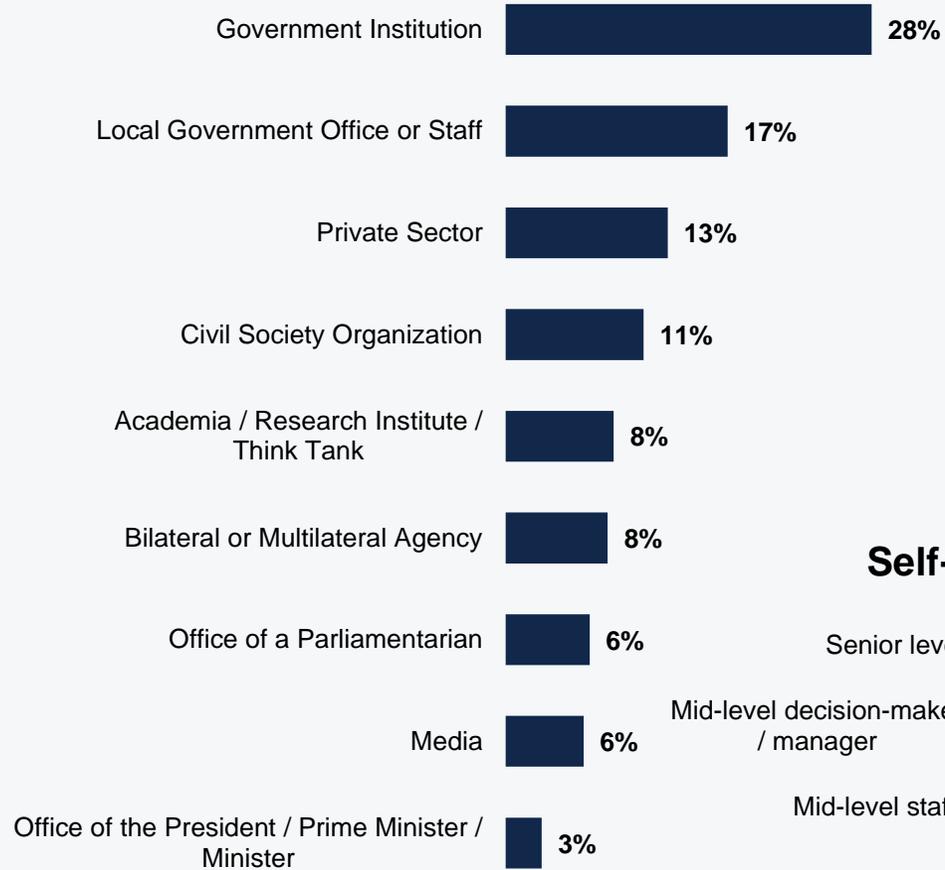
Over the past SIX MONTHS, on average how often did you do any of the following related to the World Bank Group (WBG)? (N=~204)

Sample Demographics

Respondent Profile: Affiliation, Specialization, Status

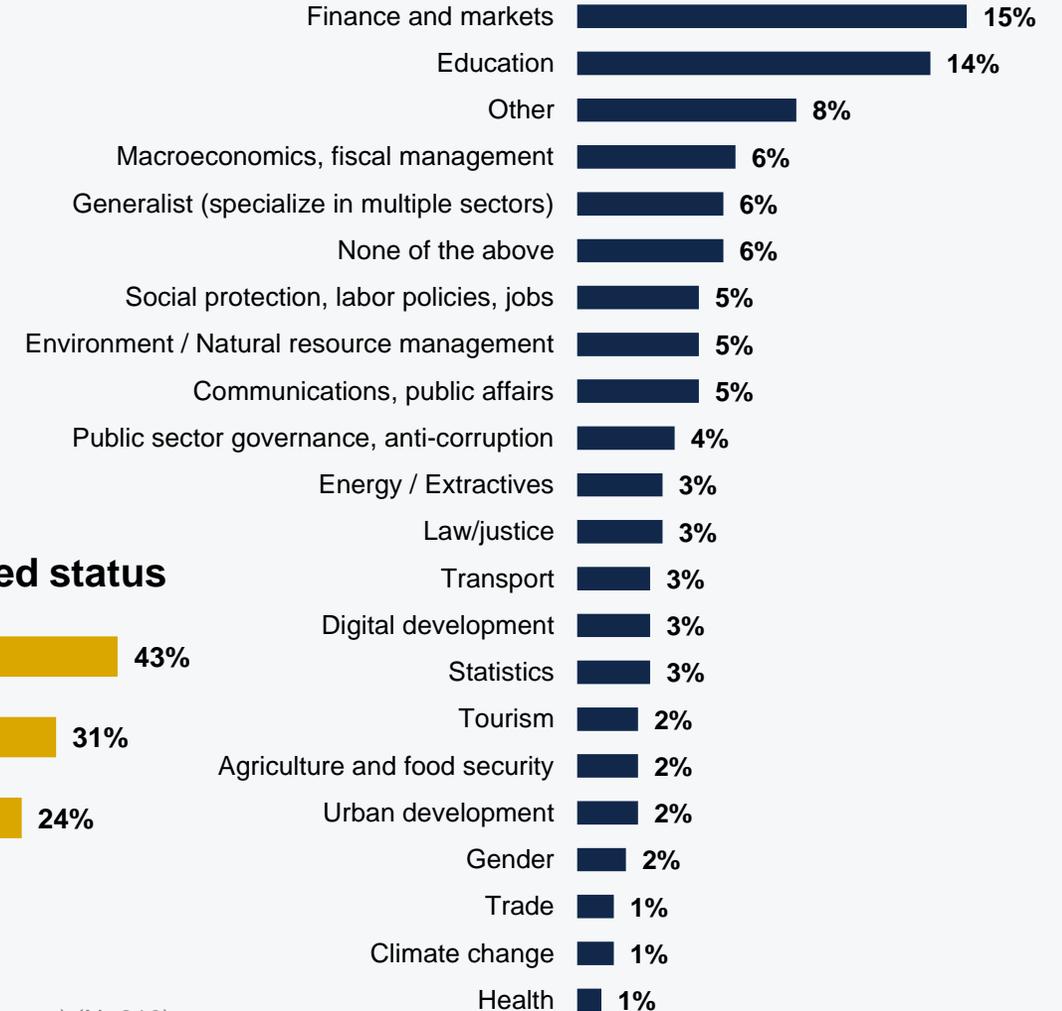
Current Affiliation

% of Respondents

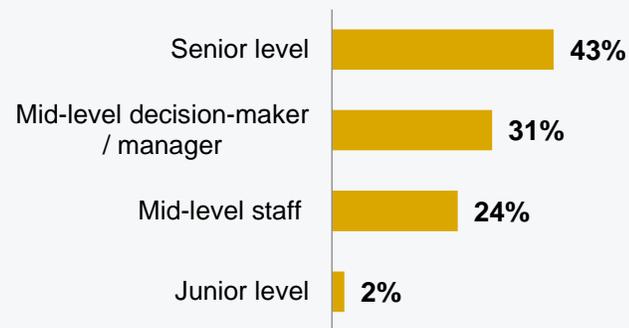


Specialization

% of Respondents



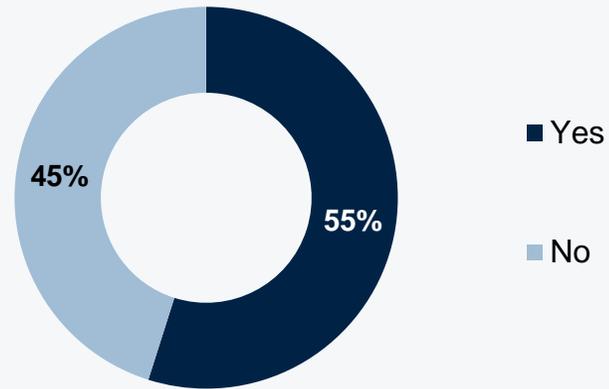
Self-identified status



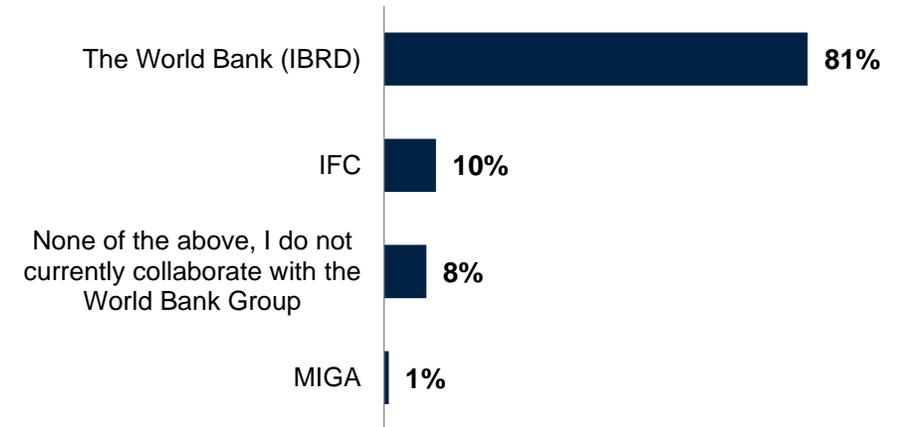
Which of the following best describes your current affiliation? (Select only 1 response) (N=216)
Please identify the primary specialization of your work. (Select only 1 response) (N=214)

Respondent Profile: Collaboration with the WBG

Collaboration with the WBG



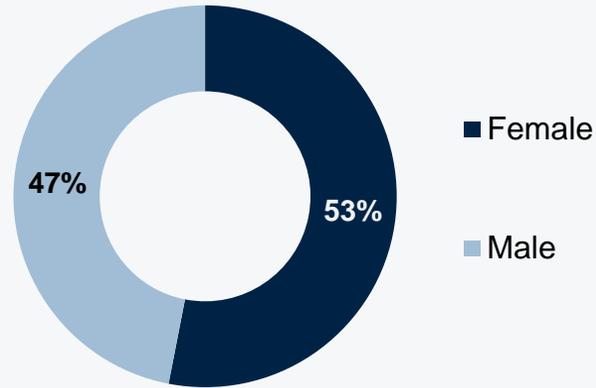
Collaboration Institution



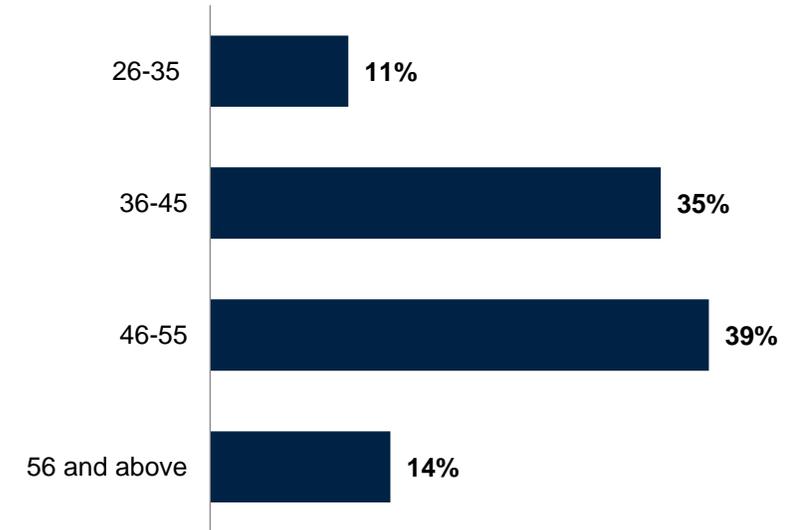
Currently, do you professionally collaborate/work with the World Bank Group (IBRD, IFC, MIGA, ICSID) in your country? (N=215)
 Which of the following agencies of the World Bank Group do you primarily collaborate/work with in North Macedonia? (Select only 1 response) (N=111)

Respondent Profile: Demographics

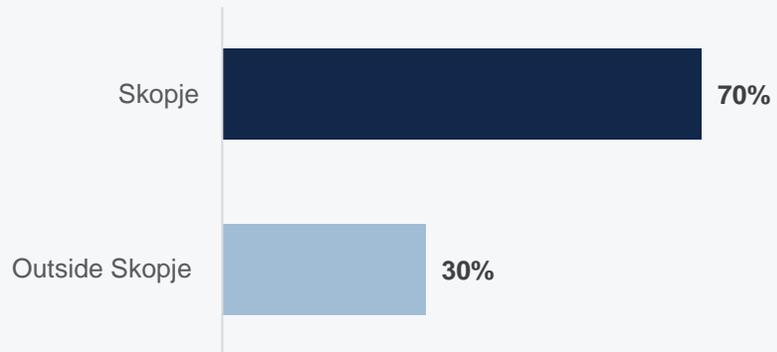
Gender



Age



Location



What's your gender? (N=213)
What's your age (N=213)
Which best represents your geographic location? (N=213)

Methodology

Methodology

From December 2022 to February 2023, a total of 413 stakeholders of the WBG in North Macedonia were invited to provide their opinions on the WBG's work in the country by participating in a Country Opinion Survey (COS). Participants were drawn from the Office of the President or Prime Minister; the Office of a Minister; the Office of a Parliamentarian, national government institutions; local governments; bilateral / multilateral agencies; the private sector; civil society organizations; academia, research institutes, and think tanks, and the media.

A total of 216 stakeholders participated in the survey (52% response rate). Respondents completed the questionnaire via an online platform.

Every country that engages in the 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).

Comparison of FY19 and FY23

The results of this year's Country Survey were compared to those of the Country Survey conducted in FY19 (with a response rate of 54%, N=183).

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 are analyzed.

The distribution of the stakeholder groups in the final samples for the FY19 and FY23 country surveys are listed in the table on the right.

This year's survey saw an increased outreach to and response from bilateral/multilateral agencies, civil society, and the private sector. However, there was a decrease in outreach to and response from the government institutions. These differences in the stakeholder composition between the two years should be taken into consideration when interpreting the results of the yearly comparisons and analyses.

% of Respondents	FY 2019	FY 2023
High-level government offices: Office of the President, Office of Prime Minister, Office of a Minister, Office of a member of Parliament / legislative body	10%	9%
Government Institutions: Employee of a Ministry / Ministerial Department / Project Implementation Unit / Independent Government Institution (e.g., Central Bank, Regulatory or Oversight Agency) / Judiciary / State-Owned Enterprise	41%	28%
Local government	14%	17%
Bilateral/multilateral agency: embassy, diplomatic, military, UN, regional development bank	4%	8%
Civil Society Organizations (CSO): NGOs/community-based organizations, private foundations, faith-based groups, professional/trade associations, and youth groups; Media	8%	11%
Private Sector: private sector organizations and financial sector/private banks	8%	13%
Academia/Research Institute/Think Tank	5%	8%
Media	8%	6%
Other	2%	0%
Total Number of Respondents	182	216

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.

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

Scale bucketing:

When mentioning **Low**, **Medium**, and **High** in the 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 -value < .05

Groups	n	%
Office of the President / Prime Minister / Minister	6	3%
Office of a Parliamentarian	14	6%
Government Institutions:	61	28%
Local Government	37	17%
Bilateral / Multilateral Agency	17	8%
Civil Society Organization	23	11%
Private Sector	27	13%
Academia/Research Institute/Think Tank	18	8%
Media	13	6%
Total	216	100%

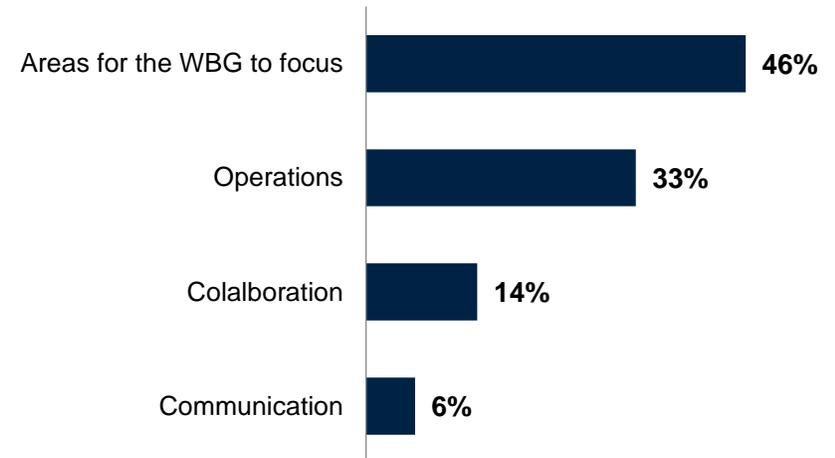
Qualitative Analysis

Regarding the qualitative part of the questionnaire, respondents were invited to share their thoughts about the ways in which the WBG could help increase its effectiveness in North Macedonia in the future:

“In your opinion, what is the most important thing the World Bank Group could do to help increase its effectiveness in North Macedonia? (Please be specific)”

A total of 125 responses were received. They varied in length from a few words to a few sentences. The comments were broadly grouped into four categories based on their main theme (please see the chart to the right) and summarized in the relevant section “The Future Role of the World Bank Group in North Macedonia”. Individual quotes were used throughout the report in relevant sections to illustrate the quantitative data.

Summary of the Main Themes in Qualitative Comments



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 North Macedonia?

A4. The World Bank Group currently plays a relevant role in development in North Macedonia, 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 North Macedonia, Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

A6. To what extent does the World Bank Group influence the development agenda in North Macedonia? Scale: 1-10 (1: To no degree at all– 10: To a very significant degree)

A7. 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 North Macedonia, 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 North Macedonia, 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_5. Collaboration with the private sector

C7_6. Collaboration with civil society

C7_7. 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 North Macedonia (i.e., investment lending, Development Policy Loan, Trust Funds), 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 North Macedonia? I am satisfied with the **quality** of the WBG's advisory services and analytical work in North Macedonia. Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

C10_5. To what extent do you agree/disagree with the following statements about the World Bank Group in North Macedonia? The WBG's advice and recommendations are **tailored** to North Macedonia's context. Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

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