

June 2023



Country Opinion Surveys

# FY 2023 **Mongolia** Country Opinion Survey Report

ECR Business Intelligence Team



THE WORLD BANK

# Acknowledgements

The Mongolia Country Opinion Survey is part of the Country Opinion Survey Program series of the World Bank. 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 the design, reporting, and analysis of the survey results. 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 Mongolia 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 Mongolia'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?
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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

*“Focus on increasing the results and effectiveness of the assistance provided to the beneficiaries in Mongolia”*

**Academia Respondent**



*In your opinion, what is the most important thing the World Bank Group could do to help increase its effectiveness in Mongolia?*

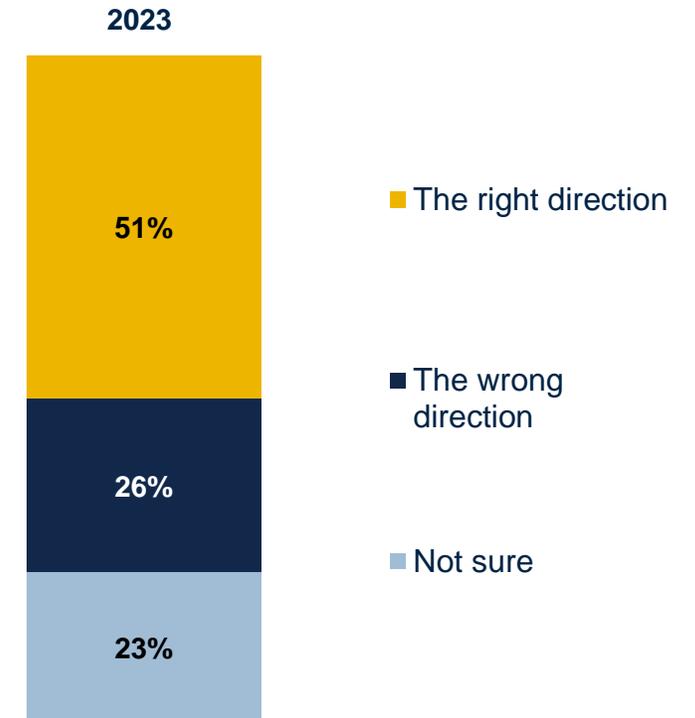
# Respondents are Split over Mongolia's General Direction

In fiscal year (FY) 2023, around half of the respondents believe that Mongolia is headed in the right direction. Respondents from the government and bilateral / multilateral agencies are more positive about Mongolia's direction compared to other stakeholder groups.

Although **83%** of the respondents from high government offices agree that Mongolia is headed in the right direction, only **19%** of respondents from the media concur. At the same time, a majority (**over 40%**) of respondents from the private sector and civil society say that the country is moving in the wrong direction.

**Respondents in Mongolia show greater pessimism this year.** By comparison, in FY20, only 10% were pessimistic or very pessimistic about the country's direction, whereas 76% were very optimistic or somewhat optimistic.

## Country direction



FY23: In general, would you say that Mongolia is headed in ... ? (N=301)  
FY20: When you think about the future in Mongolia, are you ... ?  
(Very pessimistic, Somewhat pessimistic, Somewhat optimistic, Very optimistic, Not sure) (N=263)

# Familiarity with The World Bank Group

**Comparison of FY20 and FY23:** Respondents in this year's Country Survey report significantly lower levels of familiarity with the World Bank Group than in FY20:

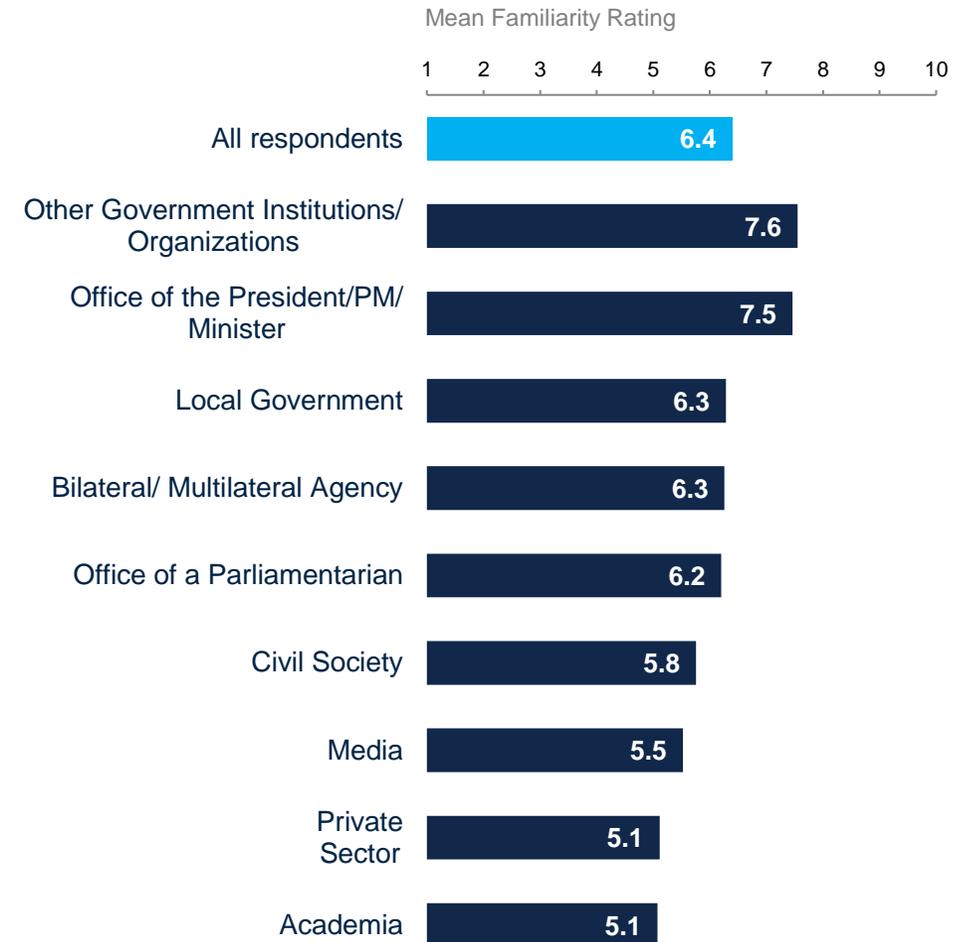
Mean familiarity: FY23 = **6.4**  
FY20 = **7.1**

This decrease in familiarity in FY23 is primarily due to lower levels of familiarity among those who don't collaborate with the WBG. The levels of familiarity among **collaborators** are similar in the two survey years and they are significantly higher compared to those of non-collaborators.

Mean familiarity:

WBG collaborators = **7.5** (7.4 in FY20)

Non-collaborators = **5.3** (6.4 in FY20)



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

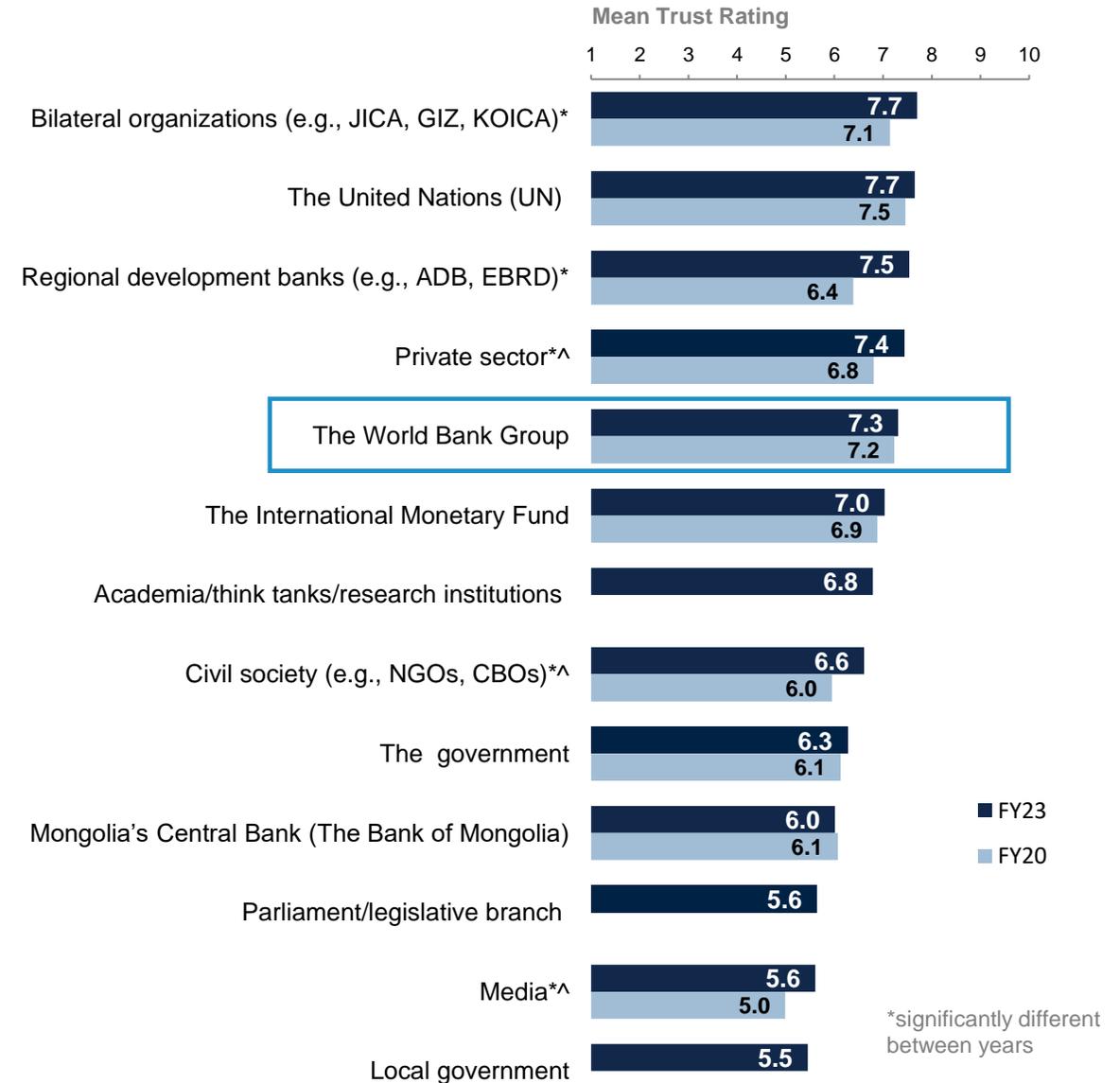
# Trust in Institutions

**Bilateral organizations, regional development banks, and the United Nations (UN) are among the most trusted institutions in Mongolia, according to the respondents.**

The trust rating for the **World Bank Group** has not changed significantly since FY20. However, respondents reported significantly higher ratings of trust in bilateral organizations and regional development banks in FY23.

Local government, the media, and the Parliament are the least trusted institutions among those studied, according to the respondents.

**Note:** ADB= Asian Development Bank; CBO= Community-based Organization; EBRD= European Bank for Reconstruction and Development; GIZ= German Society for International Cooperation; JICA= Japan International Cooperation Agency; KOICA= Korea International Cooperation Agency; NGO= Non-governmental Organization.



^The mean trust score of the private sector in the FY23 survey was compared with an average score of the international private sector and domestic private sector from the FY20 survey; similarly, civil society was compared with the average score of international civil society and domestic civil society; and media was compared with the average trust score of domestic traditional media and their web presence, internal media and their web presence, and web-based media.



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 for Development Areas

*“Focus its [WBG’s] operations and support on specific issues, such as governance, poverty reduction and so on – without trying to be engaged in all sectors and themes.”*

**Bilateral / Multilateral Organization Respondent**



*In your opinion, what is the most important thing the World Bank Group could do to help increase its effectiveness in Mongolia?*

# Areas for the WBG to Prioritize

In FY23, stakeholders would like the WBG to focus its resources on their top priorities: **Education, Private Sector Development, and Health.**

Although Education and Private Sector Development remain the top two areas for the WBG since FY20, Health rose in prominence in FY23 (+23 percentage points).

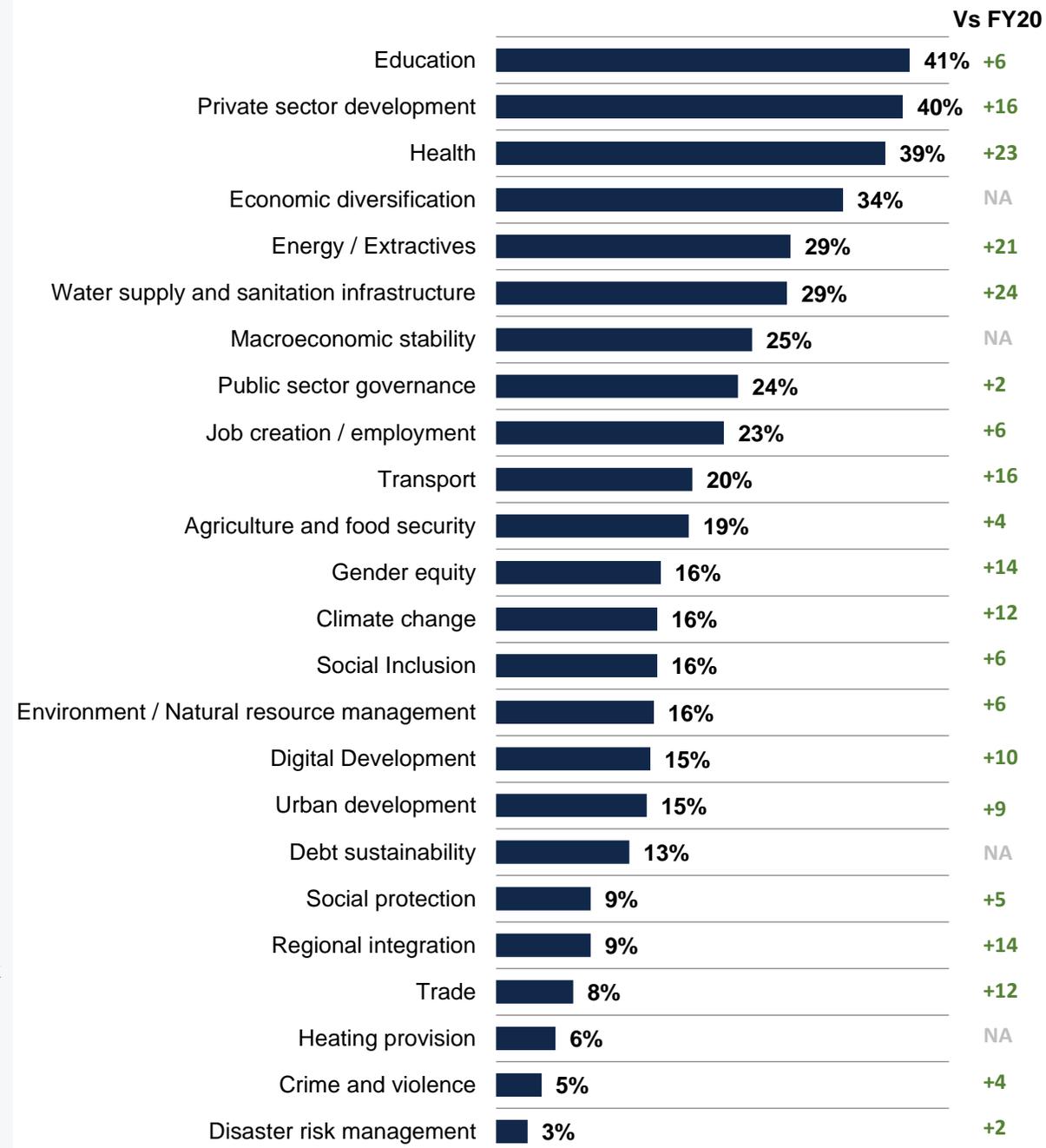
**Several other areas also rose in prominence in FY23:** Water supply and sanitation infrastructure (+24 percentage points); Energy / Extractives (+21 percentage points); and Transport (+16 percentage points).

**Note:** The overall increase in percentages is partially attributable to the change in the methodology: In FY20, respondents were offered the option of selecting up to three priorities, whereas in FY23, they could select up to five priorities. In addition, two major cross-cutting areas — Economic Growth and Poverty Reduction— were removed from the list of options in FY23.



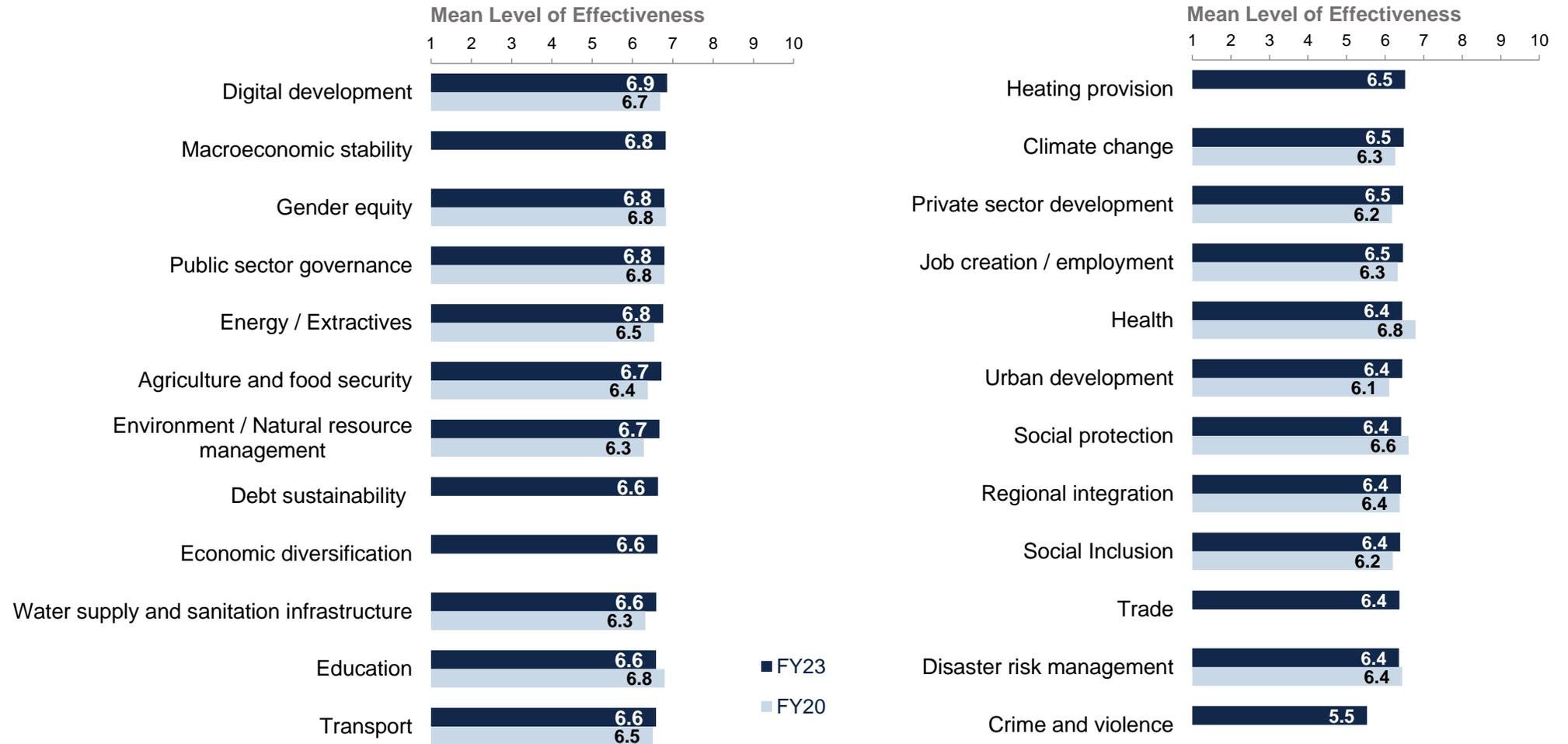
FY23: Which areas should the World Bank Group prioritize in its work in Mongolia to have the most impact on development results in the country? (Choose no more than 5) (N=287)

FY20: When thinking about how the World Bank Group can have the most impact on development results in Mongolia, in which sectors do you believe the World Bank Group should focus most of its resources (financial and knowledge services) in Mongolia? (Choose no more than THREE) (N=261)



# Effectiveness of WBG's Sectoral Support

The WBG's work in the area of **digital development** in Mongolia received the highest effectiveness rating. The overall ratings of the WBG's effectiveness across sectoral areas were similar to those of the FY20 survey.

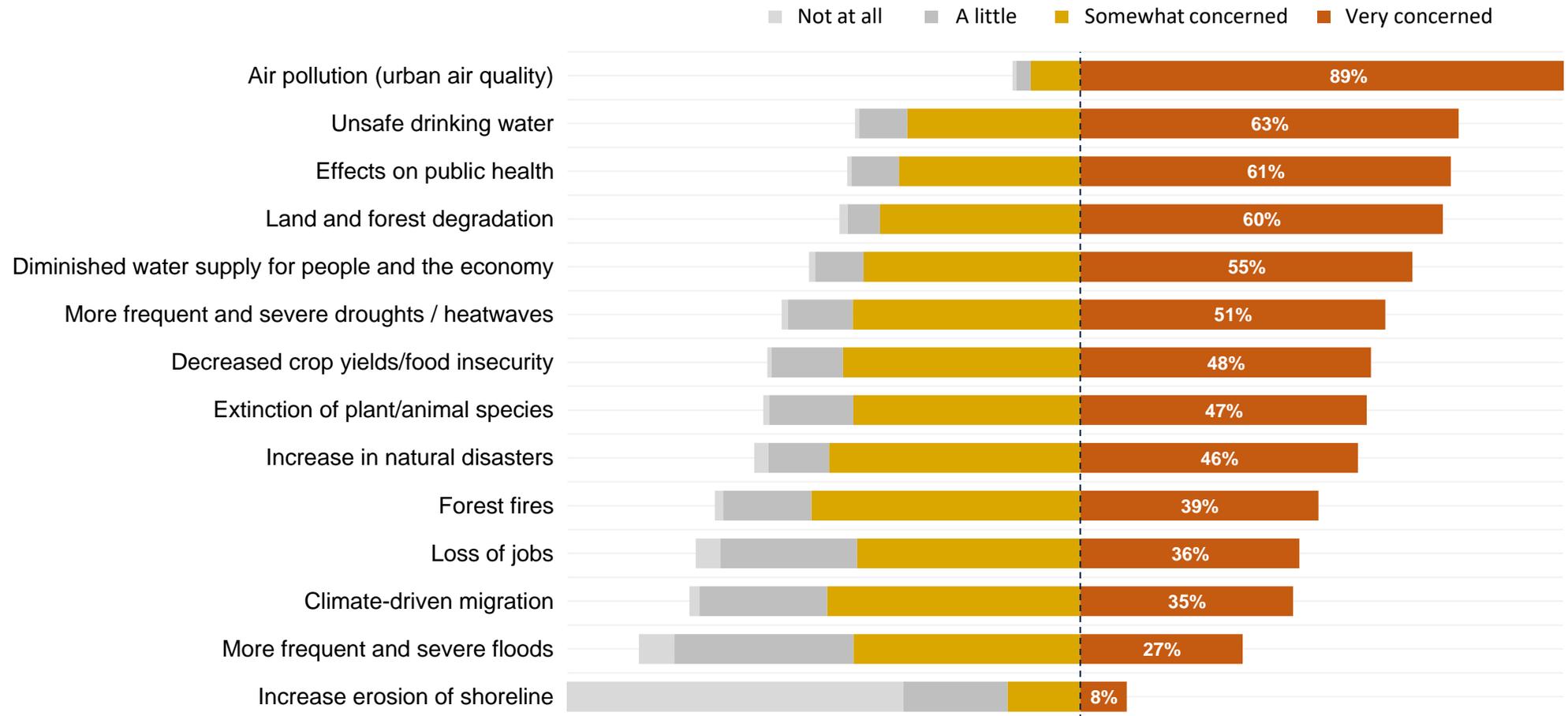


How EFFECTIVE do you believe the World Bank Group is in terms of the work it does in the following areas of development in Mongolia? (If you have NO exposure to/experience in working in any of the sectors listed below, please respond "Don't know"), Scale: 1-10 (1: Not effective at all – 10: Very effective)



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

A large majority (89%) of respondents are very concerned about **air pollution** when it comes to the potential impacts of climate change in Mongolia. About two-thirds are very concerned about unsafe drinking water (63%); the adverse effects on public health (61%); and land and forest degradation (60%).



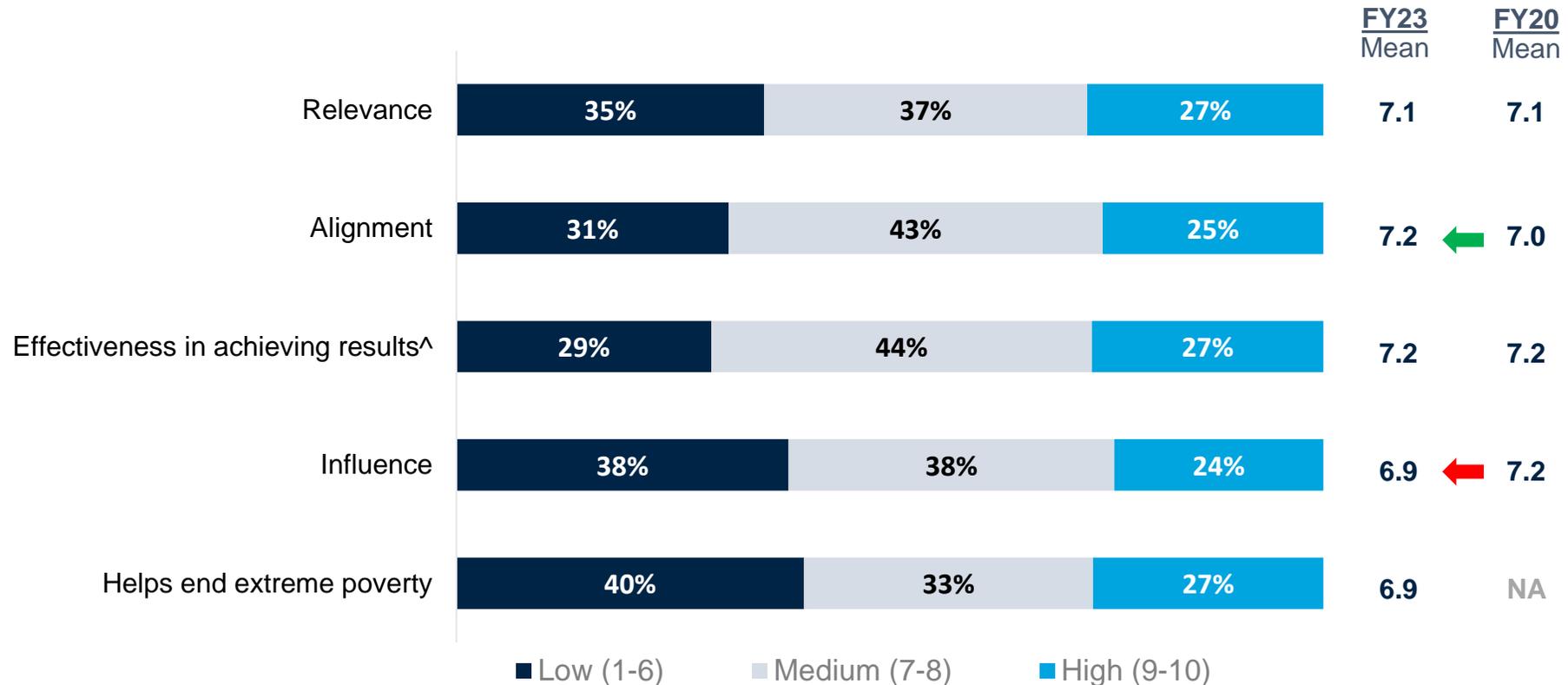
What is your level of concern for each of the potential impacts of climate change as it affects your country? (N=~295)



# Overall Attitudes toward The World Bank Group

# Key Performance Indicators

In FY23, there was a slight, non-significant improvement in the perception of the WBG's **alignment with Mongolia's development priorities**. Around half of respondents gave the WBG high ratings (9 or 10 on a 10-point scale) for **alignment**, as well as for **effectiveness in achieving development results**.

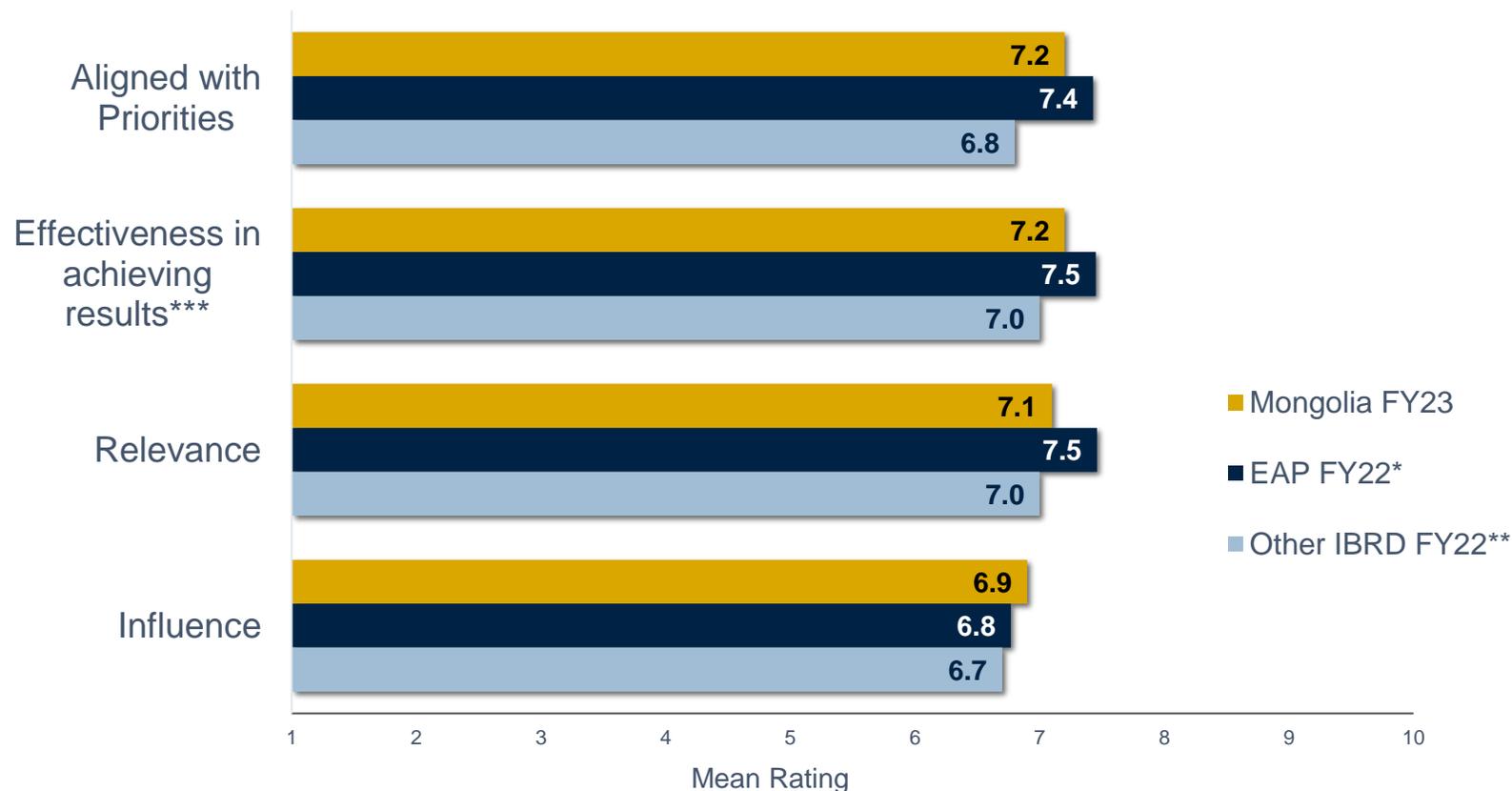


How effective has the World Bank Group been in achieving development results in Mongolia? Scale: 1-10 (1: Not effective at all– 10: Very effective)  
 To what extent does the World Bank Group influence the development agenda in Mongolia? Scale: 1-10 (1: To no degree at all– 10: To a very significant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

<sup>^</sup> To calculate the mean for this indicator for FY23, a mean score of the two questions asked in the FY20 survey was calculated: "Overall, please rate your impression of the World Bank Group's effectiveness in Mongolia." 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 Mongolia?" Scale: 1-10 (1: To no degree at all– 10: To a very significant degree)

# Comparison of Key Performance Indicators

The mean ratings for Alignment, Effectiveness in achieving development results, and Relevance in Mongolia were **somewhat lower** than in other East Asia and Pacific (EAP) countries surveyed in FY22. However, they were **higher than for those in other International Bank for Reconstruction and Development (IBRD) countries** surveyed in FY22 (please refer to the footnote for the country lists). The rating for Influence was slightly higher in Mongolia than in other EAP or IBRD countries.



\* EAP countries surveyed in FY22 included: China, the Philippines, and Thailand.

\*\* IBRD countries surveyed in FY22 included: Angola, Bolivia, Botswana, Bulgaria, Colombia, Ecuador, Eswatini, Guatemala, Jordan, Mauritius, Peru, and Thailand.

\*\*\* The means for EAP and IBRD countries represent a mean score of the two questions asked in the FY22 survey: "Overall, please rate your impression of the World Bank Group's effectiveness in xxxx." 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 xxxx?" Scale: 1-10 (1: To no degree at all– 10: To a very significant degree)

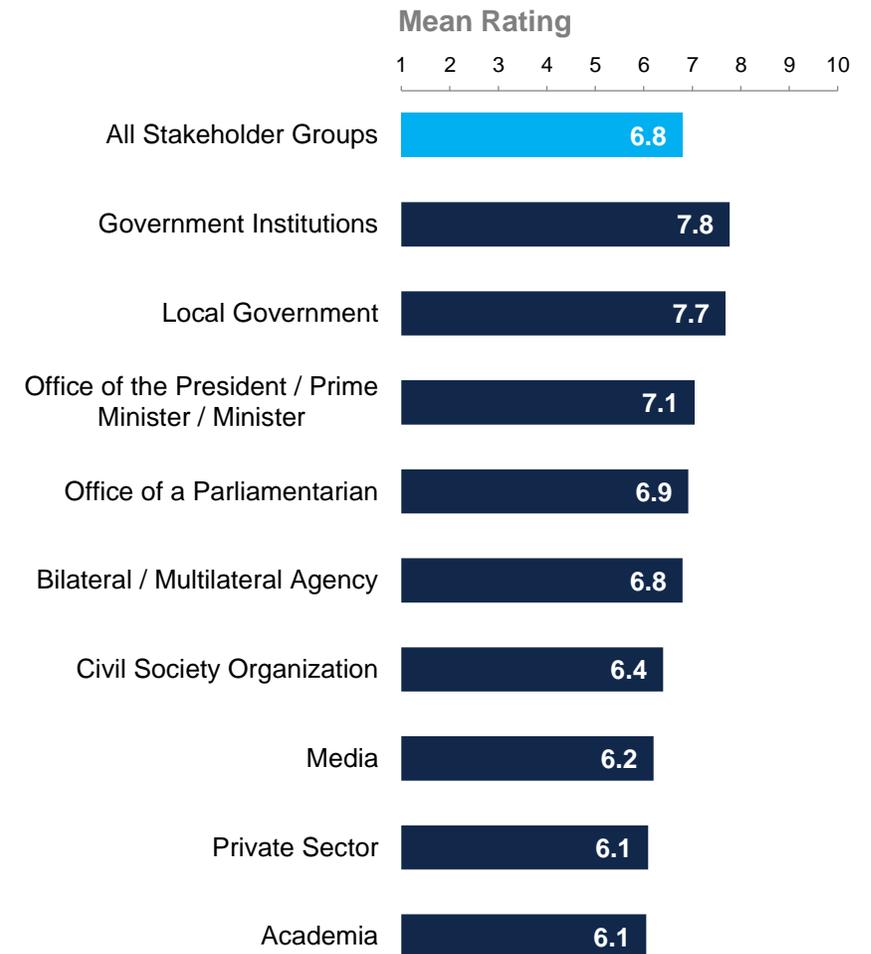
# Overall Ratings for Indicator Questions: Respondents from Government Institutions are the Most Positive

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 academia and the private sector had significantly lower mean ratings (see the figure 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 as compared to respondents who do not collaborate with the WBG:

World Bank Group collaborators = **7.4**

Non-collaborators = **6.5**



Mean Ratings for the eighteen COS Indicator Questions by Stakeholder Groups on a Scale from 1 to 10. These selected indicators are listed at the end of this report.

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

*“Support and cooperate with the initiatives of civil society organizations and grassroots organizations. I think your work is not enough in this regard.”*

**Civil Society Respondent**



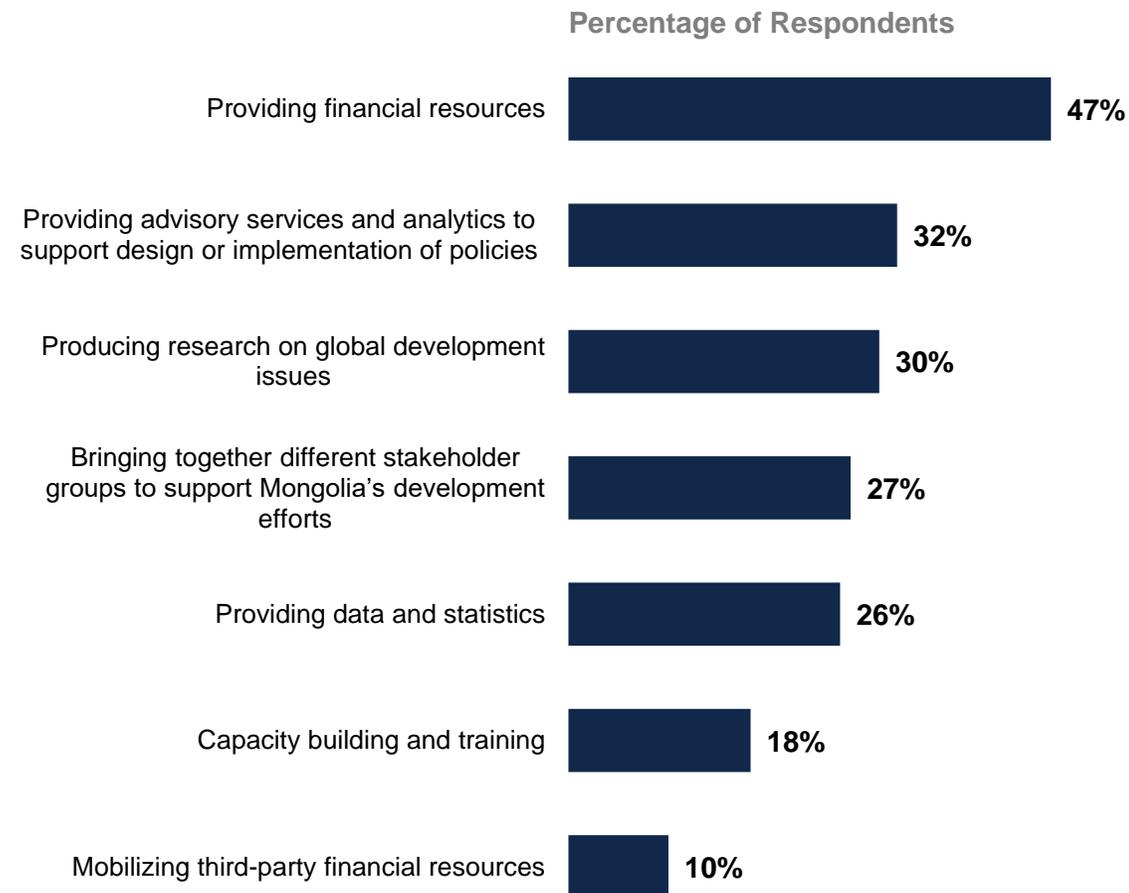
# Greatest Value

In the FY23 survey, respondents stressed the importance of the **WBG's financial resources (47%)**, whereas only 27% selected this option in FY20.

The WBG's **advisory services in support of policy design or implementation continue to be valued by about one-third of the respondents.**

Notably, more respondents in FY23 indicated that the WBG's convening power to **bring together different stakeholder groups in support of Mongolia's development efforts** is a valuable activity. Twenty-seven percent selected this option in FY23. By contrast, only 4% selected this option in FY20.

**Capacity building and training** have decreased in priority since the last survey. In FY20, 29% considered it a priority, making it the second most-valued activity. However, in FY23, only around 18% gave it a priority.



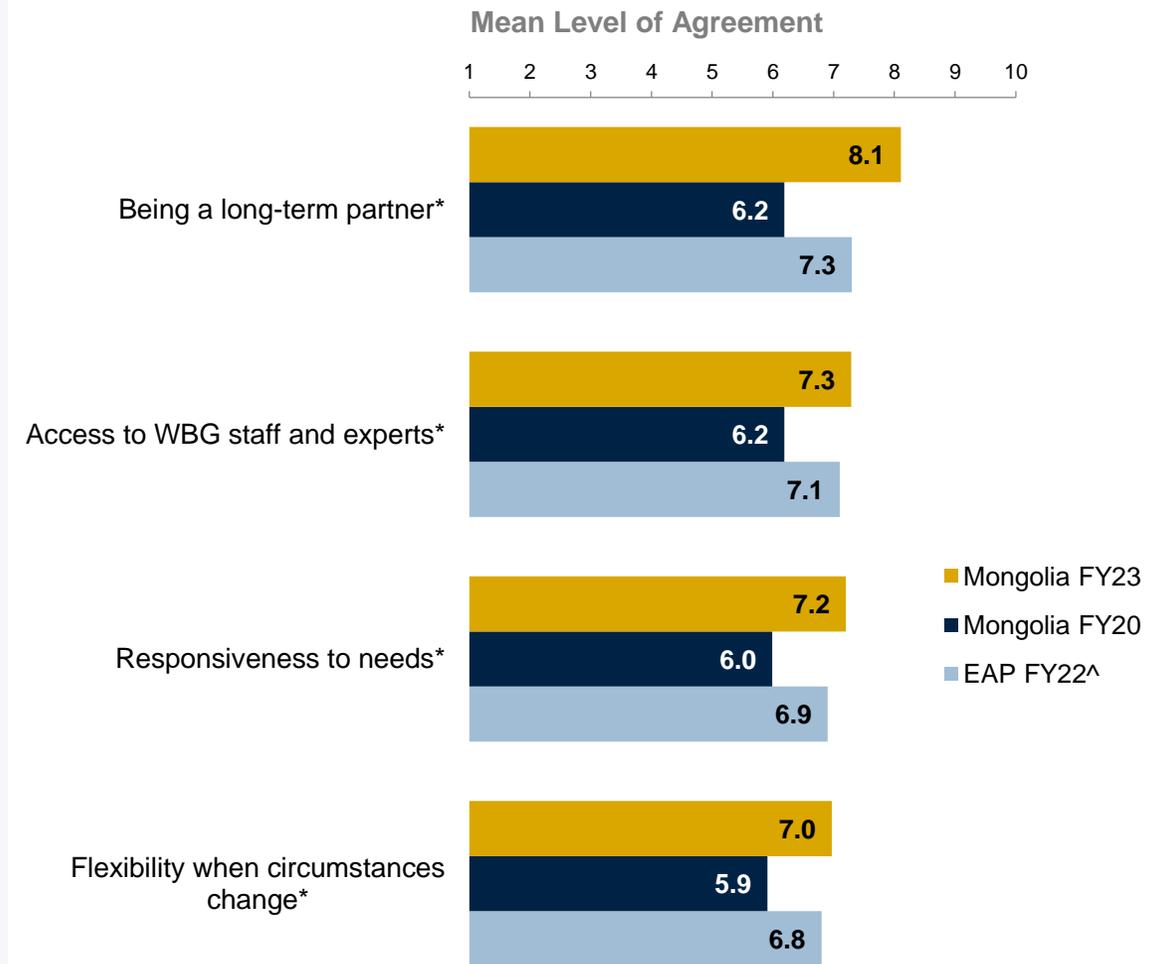
When thinking about the World Bank Group's role in Mongolia, which activity do you VALUE the most? (Choose no more than 2) (FY23 N=290)  
In FY20, the option was "Capacity development related to the WBG-supported projects"



# The WBG as a Development Partner

Perceptions of the WBG as a development partner have **improved significantly** since FY20. This is particularly true for the rating of the WBG as a **long-term development partner** in Mongolia. Indeed, the ratings increased by nearly 2 points, with the mean rating being 6.2 in FY20 and 8.1 in FY23.

Compared to other EAP countries surveyed in FY22, Mongolia had notably higher FY23 ratings, which were also significantly higher than the FY20 survey results for Mongolia.



\* Significantly different between Mongolia FY23 and Mongolia FY20



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

^ EAP countries surveyed in FY22 included: China, the Philippines, Thailand

# The WBG Should Collaborate More with the Government and Private Sector

A majority of respondents suggest that the WBG should collaborate more with the **national government** (65%) and the **private sector** (43%).

However, respondents from various stakeholder groups called for increased collaboration:

*“Partnerships with United Nations agencies to diversify its mode of engagement, depending [on the] development agenda.”*

**Bilateral / Multilateral Organization Respondent**

*“Ensure multi-stakeholder participation, especially [of] CSOs; strengthening the methodology and capacity for external monitoring.”*

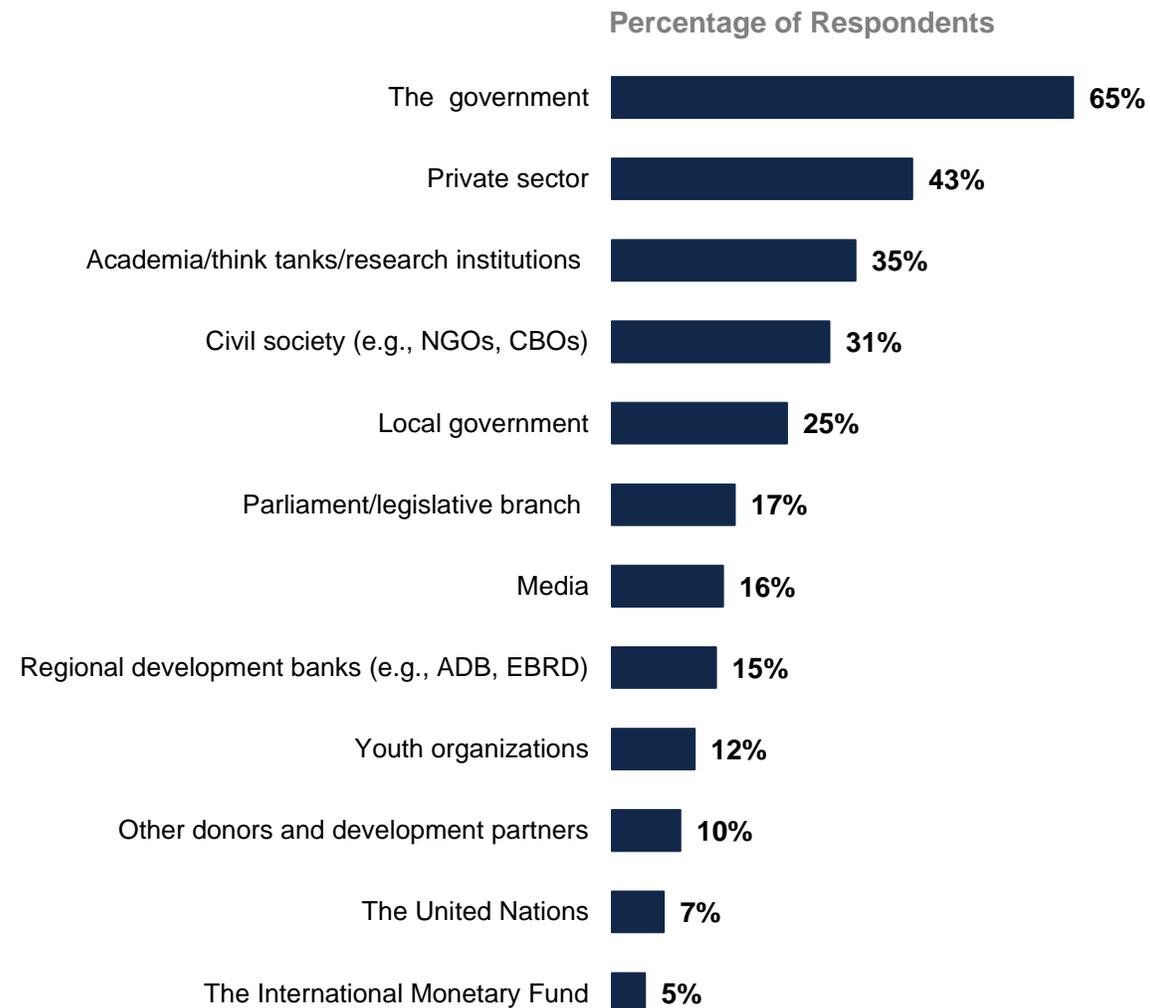
**Civil Society Respondent**

*“Close cooperation with policy research organizations is needed.”*

**Academia Respondent**

*“Increase cooperation with development research organizations and groups, expand activities aimed at disseminating policy research results, and increase their use and application”*

**Civil Society Respondent**



Which THREE of the following groups should the WBG collaborate with more in Mongolia? (Choose no more than 3) (N=298)



# WBG as a Development Partner: Collaborating with Various Stakeholder Groups

The WBG received the highest mean ratings for its collaboration with international organizations, including the **International Monetary Fund (IMF) and the UN**.

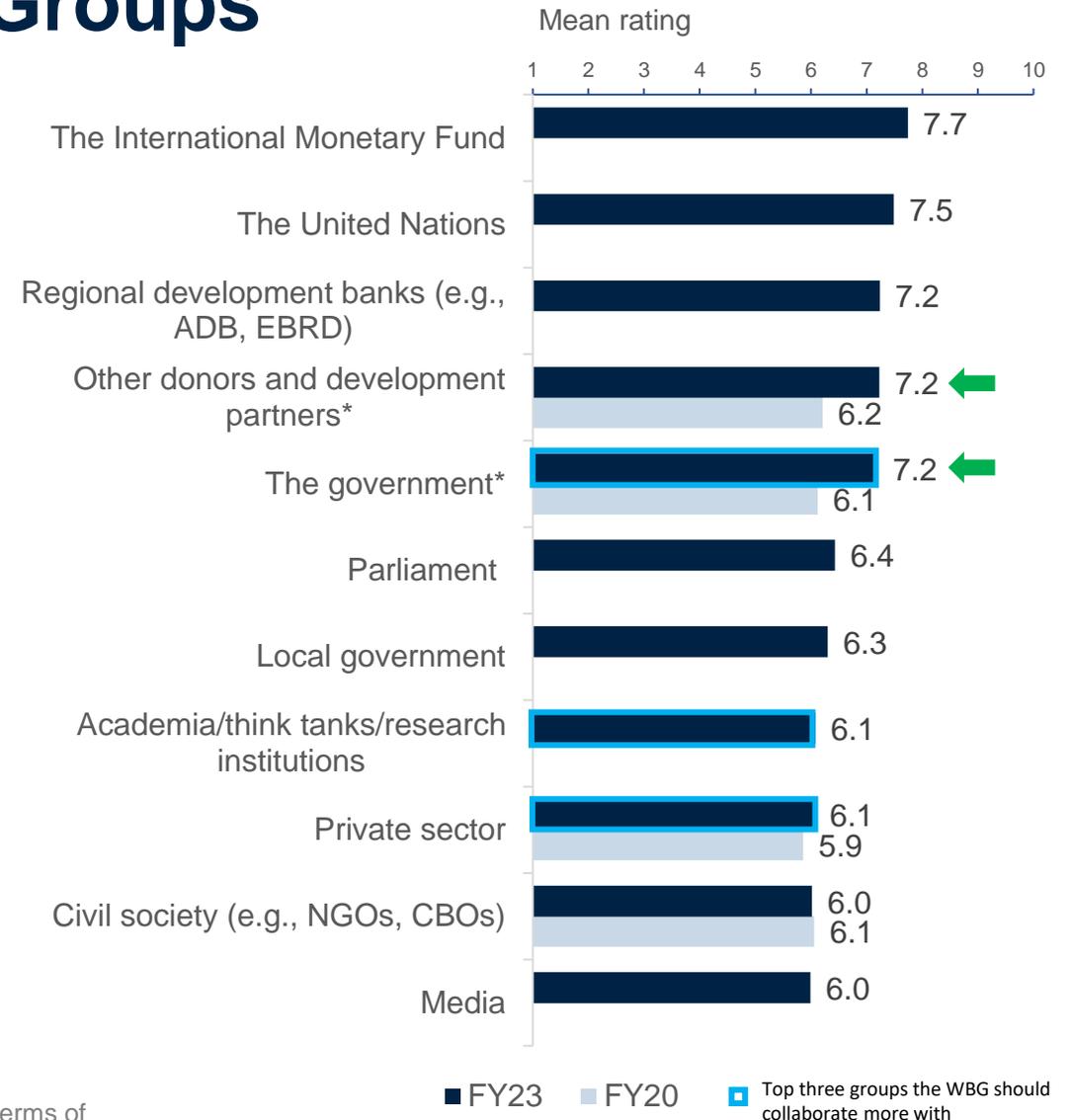
The mean ratings for collaborating with **other donors and development partners** and with **the government** have improved significantly (by over 1 point) compared to the FY20 findings.

The WBG receives relatively lower ratings for its collaboration with the private sector, academia, and civil society, with no change in perceptions since FY20. **However, it should be noted that these were the groups with whom respondents believe the WBG should collaborate more.**

Respondents from the media were the most critical of the WBG's collaboration with various stakeholder groups (mean across all groups = 5.2).

*"Be more open and engaging with all development partners to have a concerted and coordinated approach."*

**Bilateral / Multilateral Organization Respondent**



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

\* Statistically significant difference between years

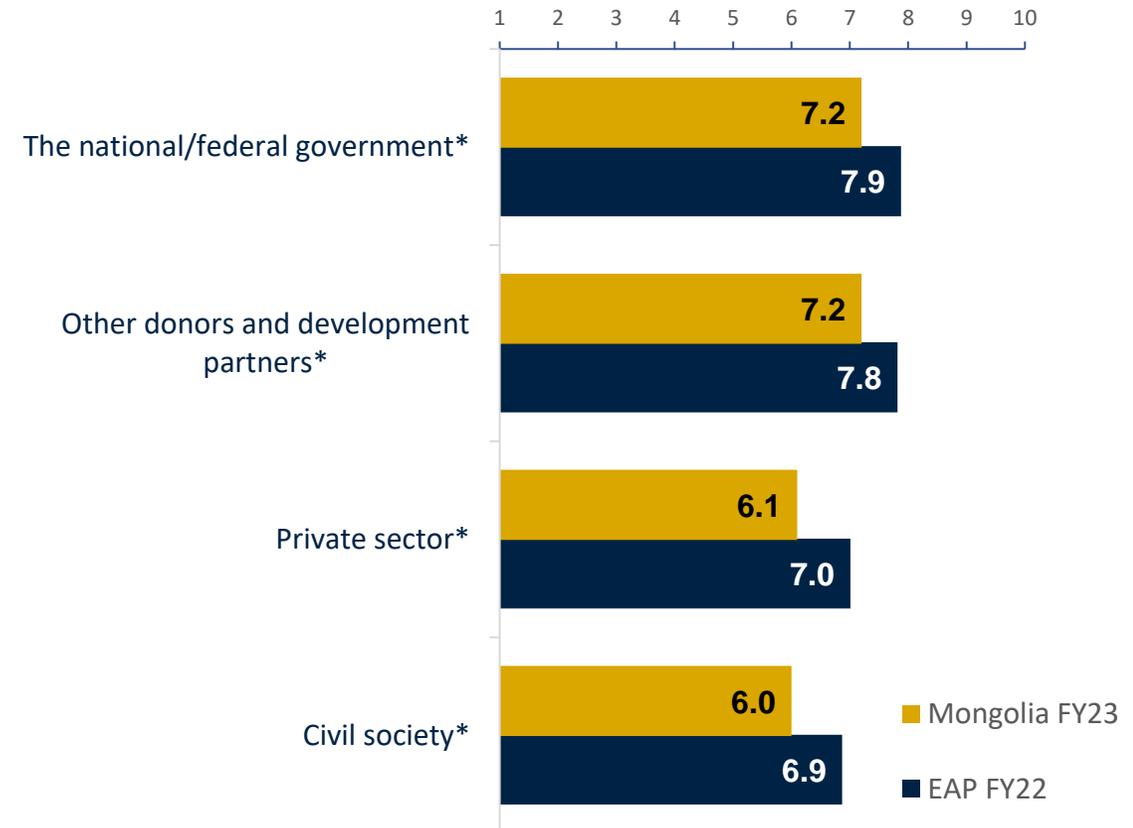
# WBG as a Development Partner in Terms of Collaboration with Various Stakeholder Groups

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

*"[The WBG] would be more effective if it cooperated with and supported representatives of civil society organizations and the women's movement, and this is always needed. There has always been and still is a need to make the participation of CSOs more meaningful [ ]. The results will be achieved by ensuring multilateral cooperation and equality..."*

**Civil Society Respondent**

WBG as development partner in collaboration with ...



\* Significantly different between Mongolia FY23 and EAP FY22



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

\*\*EAP FY22 included: China, Philippines, and Thailand

# WBG's Financial Instruments

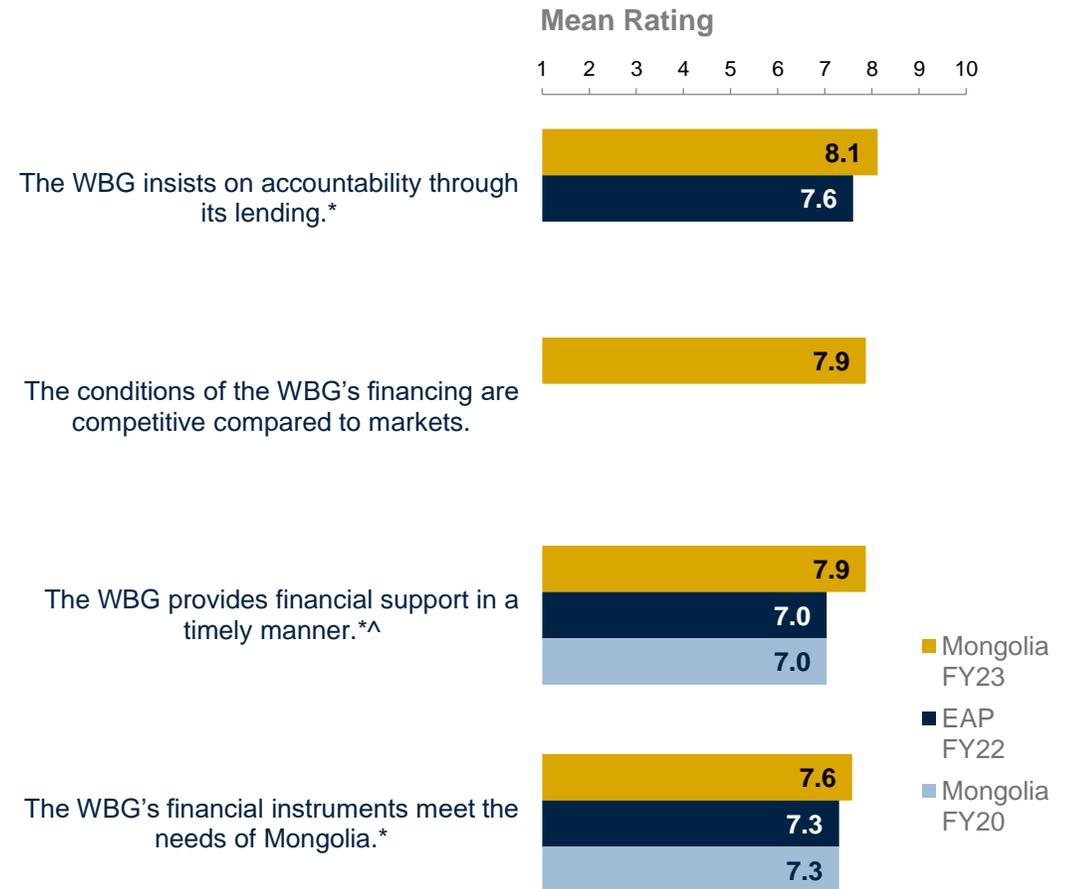
**Perceptions of the WBG's financial instruments have improved in FY23.** Rankings across all questions have improved significantly compared to the FY20 survey. They are also significantly higher than in other EAP countries surveyed in FY22.\*\*



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

^ In FY22 and in FY20, the option was “The World Bank Group’s approvals and reviews are done in a timely fashion”

\*\* EAP FY22 included: China, Philippines, Thailand



- Significantly different between Mongolia FY23 and EAP FY22 / Mongolia FY20

# World Bank Group's Knowledge Work and Activities

*“Increase cooperation with development research organizations and groups, expand activities aimed at disseminating policy research results and increase their use and application.”*

**Civil Society Respondent**

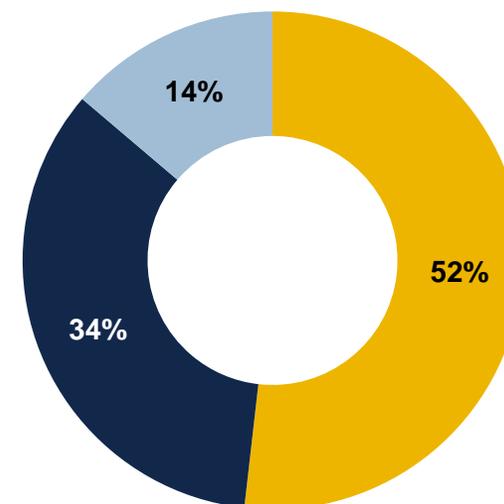


# WBG's Knowledge Work

Over half of the respondents (**52%**) report using the WBG's advisory services and analytical work (knowledge work).

Responses differed significantly by stakeholder group. Whereas **74% of respondents from government institutions** and **59% of respondents from bilateral / multilateral agencies** report using the WBG's knowledge work, only **28% of respondents from the private sector** report using it. Furthermore, about **25% of respondents from the media** report using the WBG's knowledge work.

## Use of the WBG's Advisory Services and Analytics



■ Yes ■ No ■ Not sure



Have you used the WBG's advisory services and analytics in the past? (N=305)



# WBG's Knowledge Work

## (continued)

Almost all respondents, **apart from those from the private sector and academia**, have given high ratings to the quality of the WBG's knowledge work in Mongolia (with means higher than 7.0). They have also expressed their willingness to continue using the WBG's advisory services and analytics in the future (mean=8.2).

Furthermore, the ratings for comparable questions have improved in FY23 (please see the chart on the right); in some questions, they were higher than those of other EAP countries surveyed in FY22.\*\*

*"Having a good understanding of Mongolia's characteristics, actual conditions and situation, guiding the implementation of measures that will help to solve timely and urgent problems in the long term."*

**Academia Respondent**

*"Research, evaluation, and conclusions, and aligning one's own policy and strategy with the development policy of Mongolia"*

**Civil Society Respondent**



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 Mongolia?

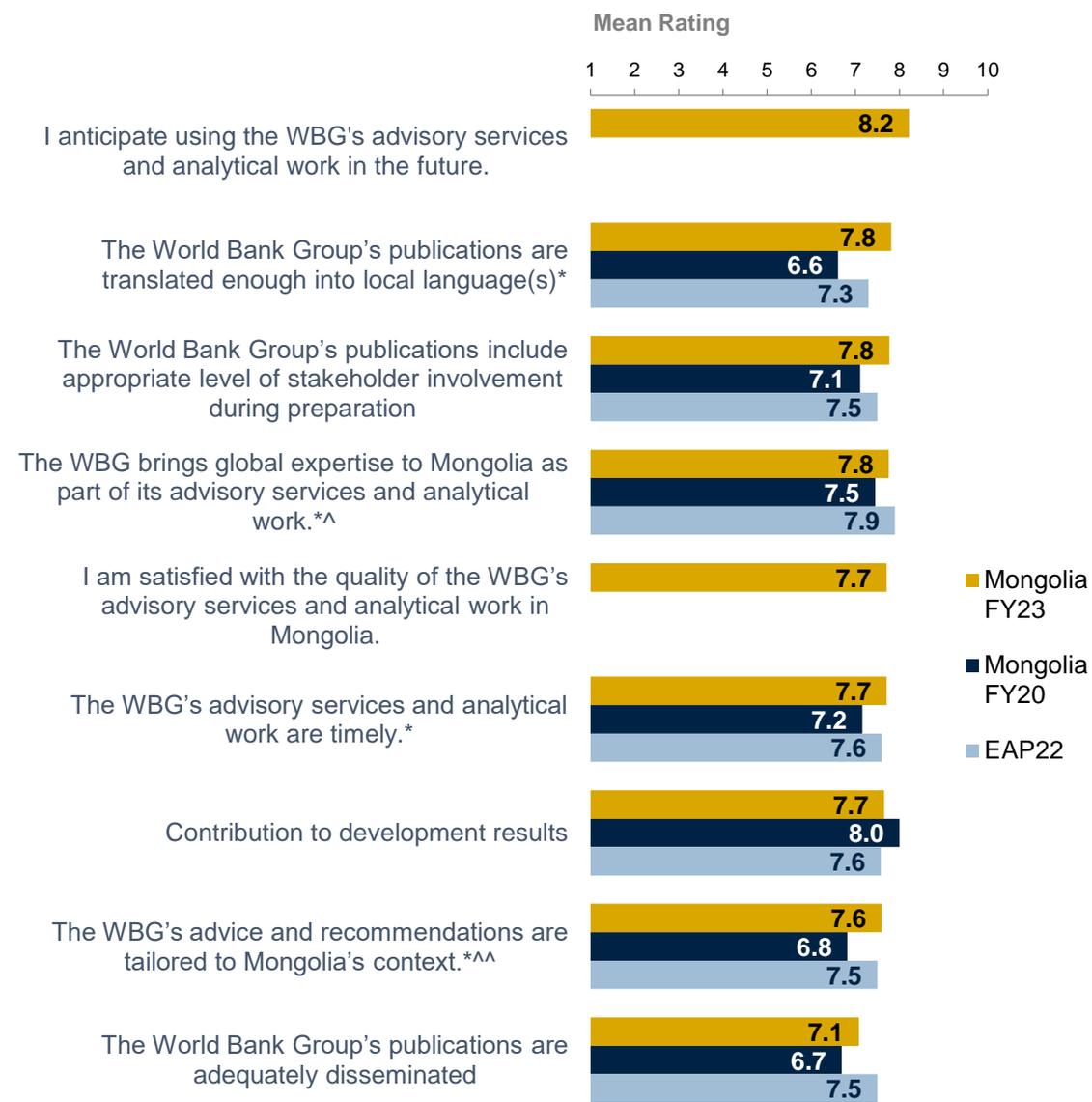
Scale: 1-10 (1: Not significant at all– 10: Very significant)

^ In FY20, this option was "In Mongolia, to what extent do you believe that the World Bank Group's knowledge work and activities: Are source of relevant information on global good practices";

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

^^ In FY20, this option was "In Mongolia, to what extent do you believe that the World Bank Group's knowledge work and activities: Are adaptable to Mongolia's specific development challenges and country circumstances"; Scale: 1-10 (1: To no degree at all– 10: To a very significant degree)

\*\* EAP FY22 included: China, Philippines, Thailand



\* Significantly different between Mongolia FY23 and Mongolia FY20

# The Future Role of the World Bank Group in Mongolia

*“[The WBG should] prepare well and get a better feel for what the government wants. Also, speed up the period of issuing any loan and [providing] assistance, and adjust them correctly to the needs of the government and to the speed of operations.”*

**Respondent from an Office of the President, Prime Minister, or Minister**



# What the World Bank Group Could Do to Help Increase its Effectiveness in Mongolia

In their responses to the qualitative question about what the WBG could do to help increase its effectiveness in Mongolia, about **41%** identified what they believe should be the key areas for the WBG; **33%** of respondents commented on the WBG's operational work; **16%** stressed the importance of collaboration; and some **10%** 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) public sector governance**, including **capacity development** and the **empowerment of citizens** to participate in governance; **support for institutional transparency and budget accountability**; **(ii) energy and climate change** solutions, particularly putting an emphasis on renewable energy and addressing air pollution and climate change; **(iii) macroeconomic stability and support for private sector and innovations**; and **(iv) data and knowledge sharing**.

*“Emphasis should be placed on improving state institutions and capabilities, and I think that the instability and capabilities of state institutions affect the effective functioning of the World Bank. I think it would be good if the decision-making and finalization process was speeded up a bit..”*

**Civil Society Respondent**

*“Investment lending to address air pollution in Ulan Bator, traffic congestion and climate change.”*

**Civil Society Respondent**

*“In my opinion, the most important thing the WBG could do to help increase its effectiveness in Mongolia is to support innovation and startup development, [including the] ... financing in various fields, with more focus on technological [and] scientific innovations and other areas essential to economic diversification and social development.”*

**Private Sector Respondent**

*“Create a database by conducting frequent surveys in the social and economic sectors and deliver it to policymakers and the public.”*

**Respondent from an Office of the President, Prime Minister, or Minister**



In your opinion, what is the most important thing the World Bank Group could do to help increase its effectiveness in Mongolia? (Please be specific) (N=51)

^ Importantly, only respondents who answered the survey via an online platform were asked to answer this question, while those filling out paper surveys – were not.

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

**Operations:** Respondents stressed the need for the WBG to work with greater speed and a better understanding of the country's needs and priorities. Respondents welcome the widening of the scope of operations in Mongolia. They see the need for more capacity building (particularly for the government), implementation support, and results orientation. Some respondents expressed the need for closer monitoring of the WBG projects, as well as for greater transparency in its work, including wider publication of project information.

*"[The WBG needs] to have a good understanding of Mongolia's characteristics, actual conditions, and situation, guide the implementation of measures that will help to solve timely and urgent problems in the long term."*

**Academia Respondent**

*"[The WBG should] cooperate on implementing projects and programs that are very necessary for Mongolia, provide internationally recognized research and information, and strengthen ... capacity."*

**Respondent from an Office of a Parliamentarian**

**Collaboration and Communication:** Responses mainly focused on the need for more effective collaboration with various stakeholder groups (CSOs, research organizations, the UN, and other development partners), as well as the wider sharing of project information. These responses are quoted, and they are for the most part covered in other sections of this report as well.



# Communications and Outreach

*“[The WBG needs] to share with others the information [pertaining to the organization of ] ...an activity in a comprehensive manner. For example, I was looking for the information in the field of education. I don't know what kind of activities are conducted [by the WBG] at all.”*

**Government Institution Respondent**



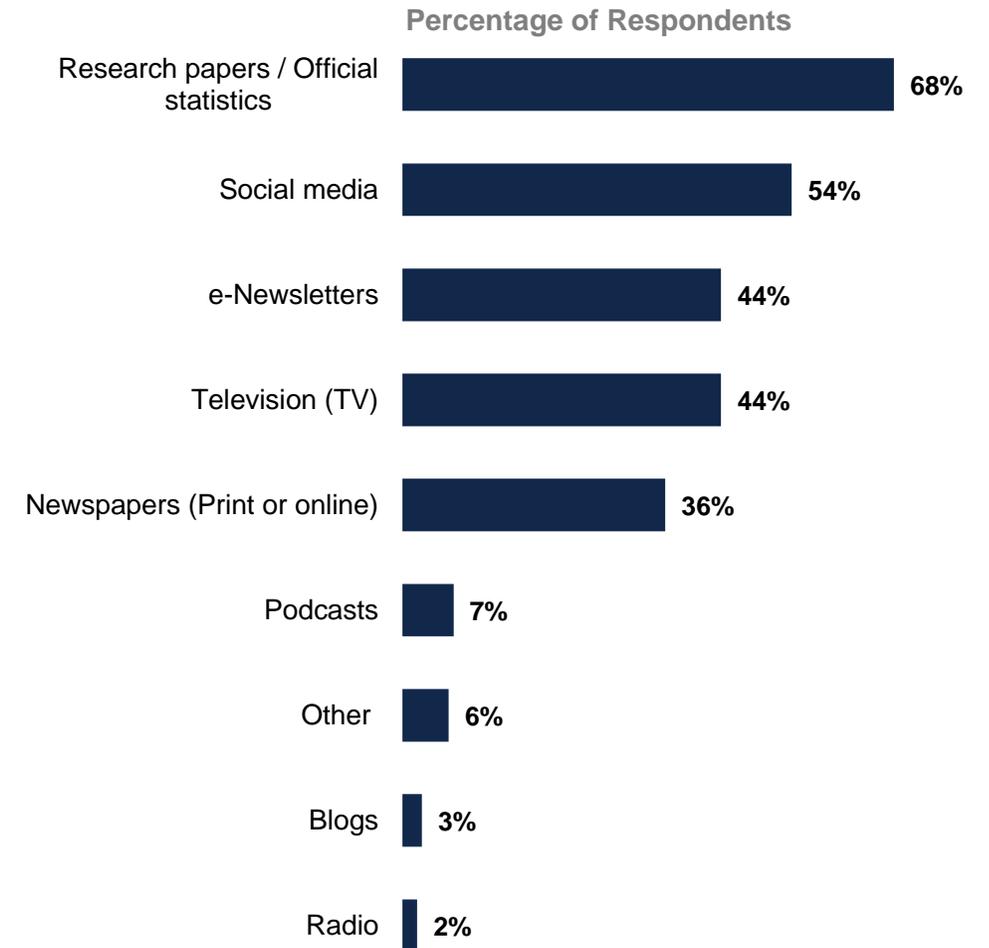
# General Information

## Sources

Respondents report using a variety of sources to obtain information about socioeconomic development issues in Mongolia. However, a majority relies on **research papers / official statistics (68%)** and **social media (54%)**.

In FY23, the number of respondents who report using **social media** as their preferred information source **tripled** (that is, from 18% in FY20 to 54% in FY23).

There were significant differences among stakeholder groups. Whereas respondents from academia and civil society strongly prefer **research papers** (over 80%), respondents from the local government report a stronger preference for **television** (67%).



How do you get most of your information about economic and social development issues in Mongolia? (Choose no more than 3) (N=297)

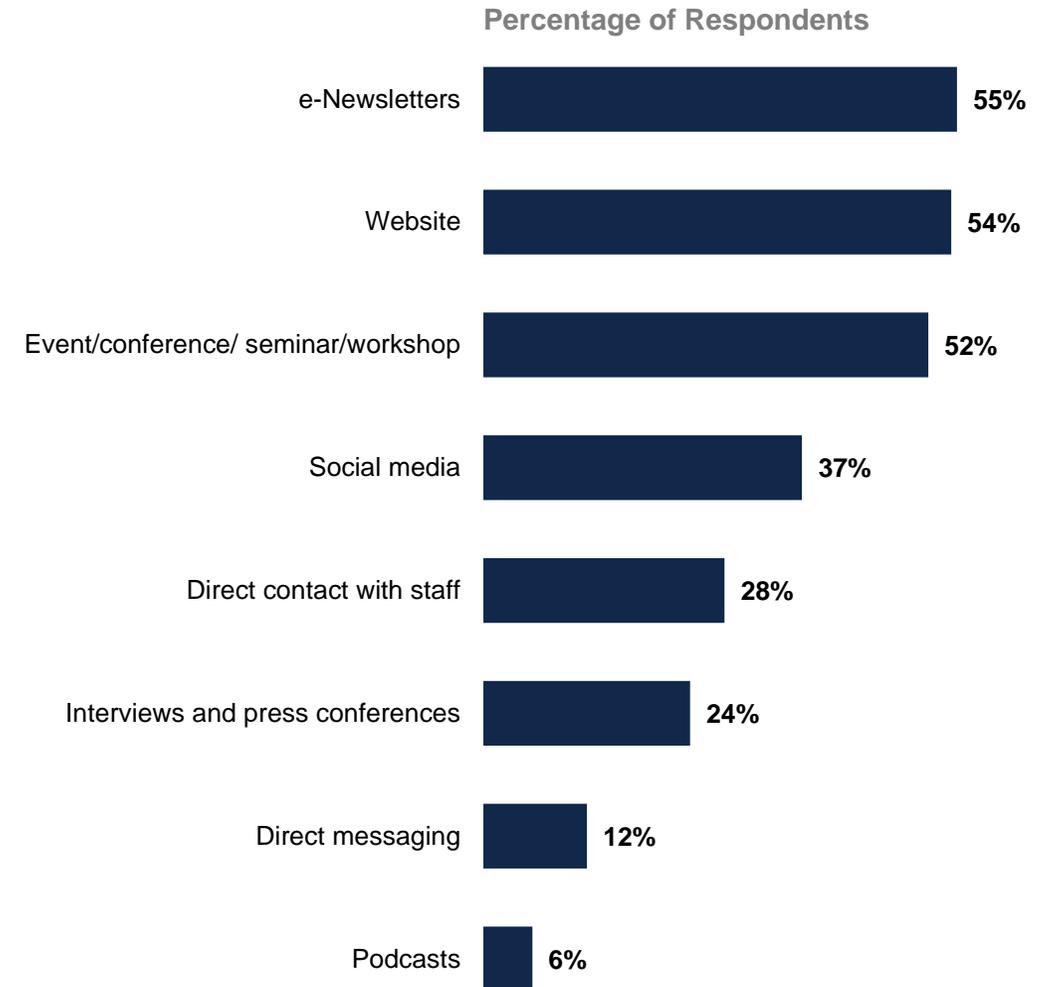
# Preferred WBG Information Sources

Respondents report a preference for a variety of channels regarding the receipt of information about the WBG and its work. The **e-newsletters**, the WBG **website**, and **events** continue to be the most preferred channels.

However, other channels are almost of equal importance for some stakeholder groups. For instance, respondents from the media identified **interviews and press conferences** as an important information source (52%). **Social media** is a preferred channel for respondents from the Office of a Parliamentarian (56%), academia (57%), and civil society (56%).

*“Disseminate information to non-governmental participants, cooperate with civil society organizations on a broad scale, and pay attention to delivering information to them.”*

**Civil Society Respondent**



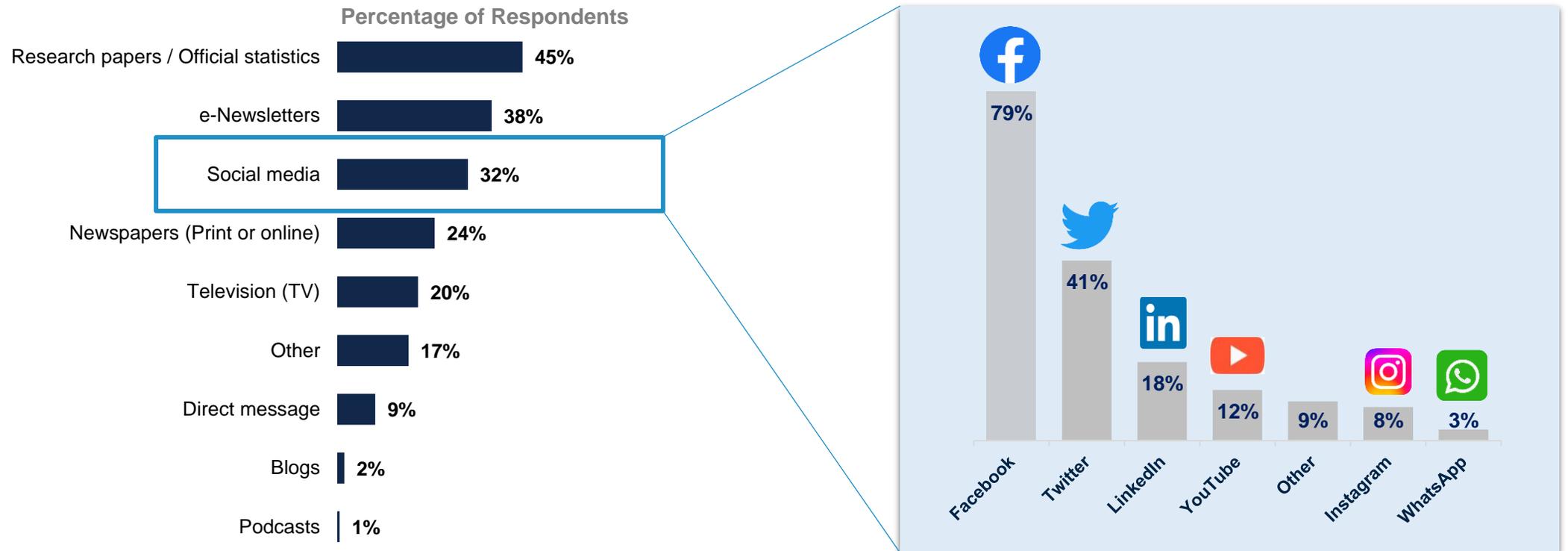
How would you prefer to receive information about the World Bank Group and its work?  
(Choose no more than 3) (N=300)

# Recent Interactions with the WBG

A total of **58%** of respondents recall hearing or seeing something about the WBG in the last 30 days.

Most respondents (45%) report seeing WBG-related information in **research papers / official statistics** and in **e-newsletters** (38%). Among those who selected “Social media”, most respondents report seeing something on **Facebook** (79%), followed by **Twitter** (41%).

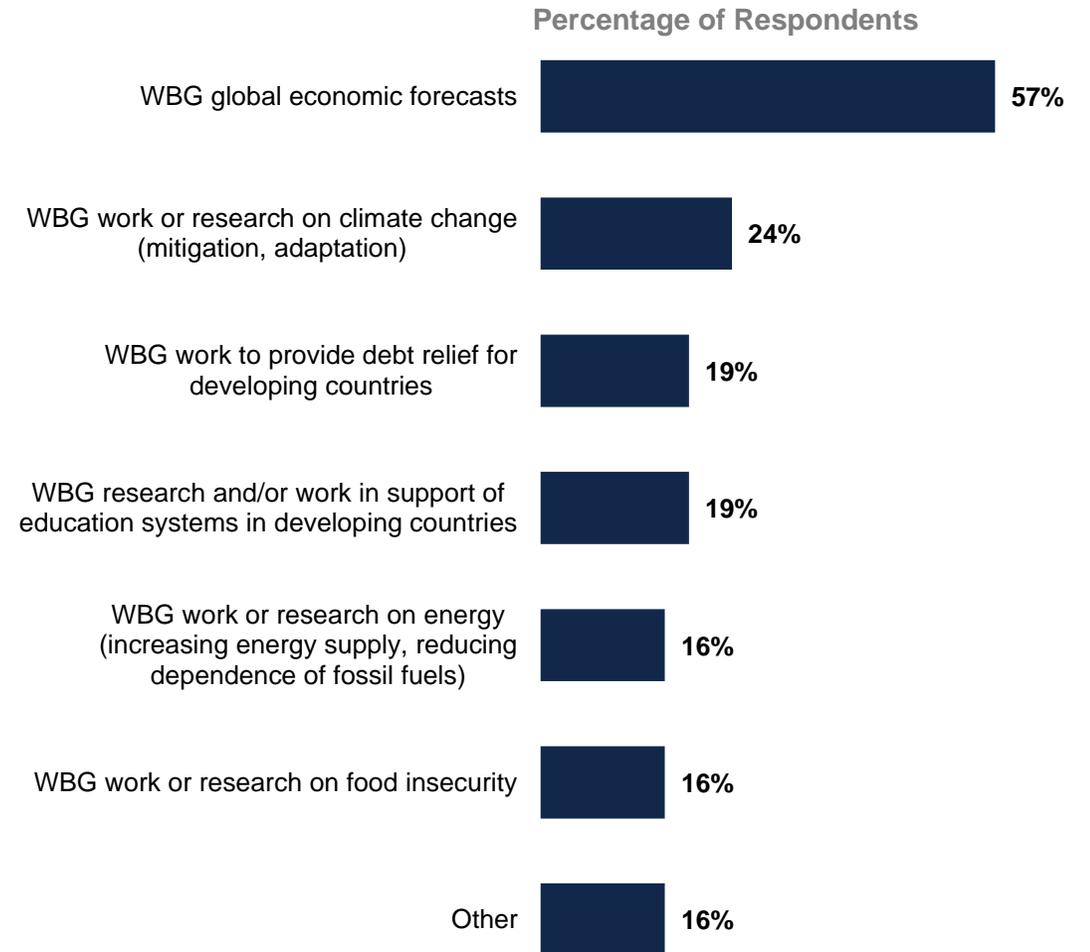
The 17% of respondents who selected “Other” mentioned **personal contacts** with the WBG staff, consulting the **WBG website**, as well as **events** and **international media** sources.



Where do you recall seeing or hearing this information? (Check all that apply) (N=173)  
What social media platforms do you recall seeing this information on? (Check all that apply) (FY23 N=78)

# Topic Recall in the Last 30 Days

The WBG's global economic forecasts (57%) and the WBG's work or research on climate change (24%) were the top two topics that respondents recalled seeing or hearing about in relation to the WBG in the last 30 days.



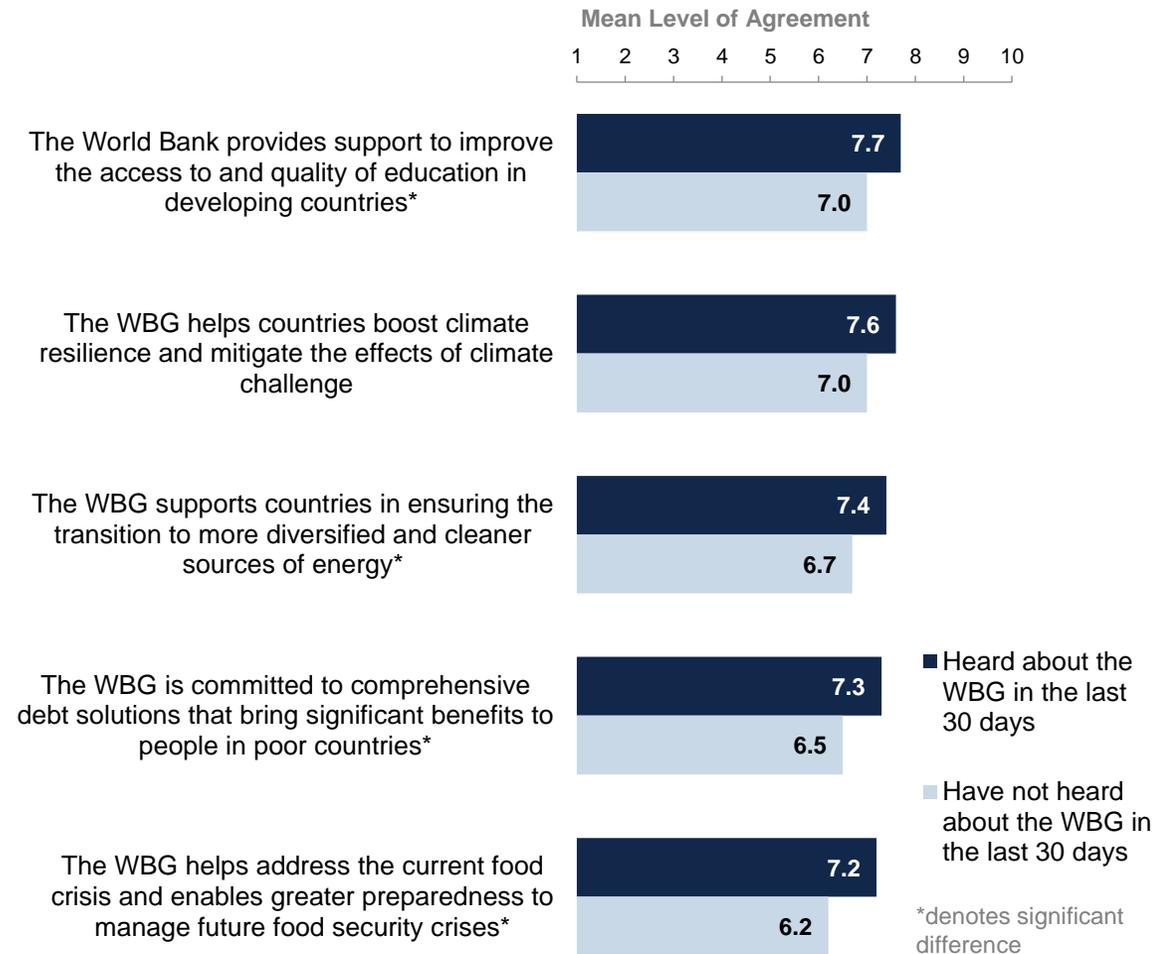
What topics were included in what you saw or heard? (Check all that apply) (N=167)

# 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 figure on the right). They also report a significantly higher perceived level of familiarity with the WBG (**mean = 7.4**) as compared to those who reported not hearing or seeing anything about the WBG recently (**mean=5.3**).

Those who collaborate with the WBG were significantly more likely to recall messages about the WBG (73%) than those who do not collaborate (39%). There were differences in message recall among stakeholder groups: **respondents from the private sector** (29%) and from **academia** (36%) were the least likely to recall messages related to the WBG. These groups were also among those that reported the least familiarity with the work of the WBG.

**These findings suggest that respondents who are more frequently exposed to the information about the WBG, or who actively engage with the WBG's channels (website, social media, and so on), are also more likely to hold more positive views about the WBG's work.**

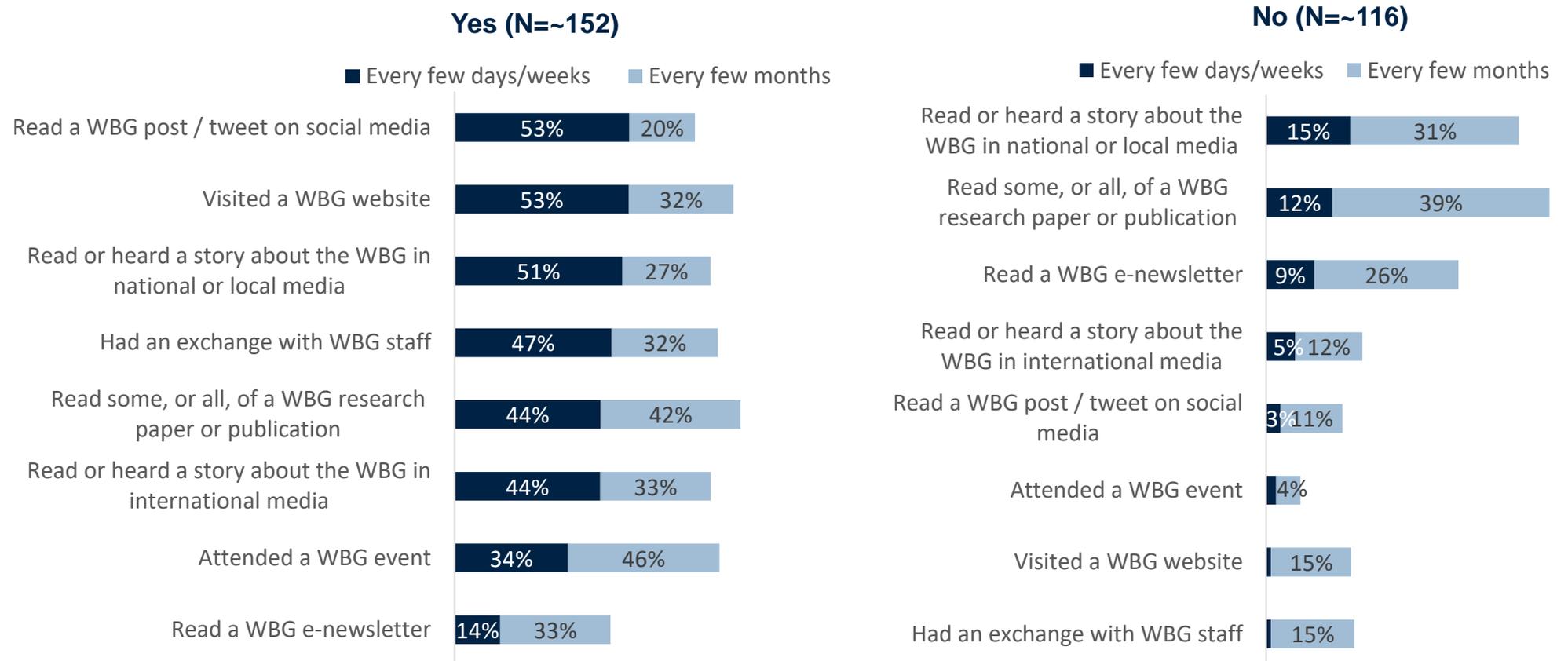


Do you recall seeing or hearing anything about the WBG in the last 30 days?  
 To what extent do you agree with the following statements: Scale: 1-10  
 (1: To no degree at all – 10: To a very significant degree)

# Frequency of Engagement Matters for Message Recall

Respondents who recall hearing something about the WBG in the last 30 days tend to have **much more frequent interactions** with the institution **across ALL channels**, including **personal interactions with the WBG staff**. They are also more likely to **visit the WBG's website**, its **social media channels**, and/or hear about the WBG in the **national media**. Respondents who do not recall the WBG's messages tend to hear about the institution in the national media and occasionally read the WBG's publications and e-newsletters. They are not very engaged through any other channels.

## 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~273)

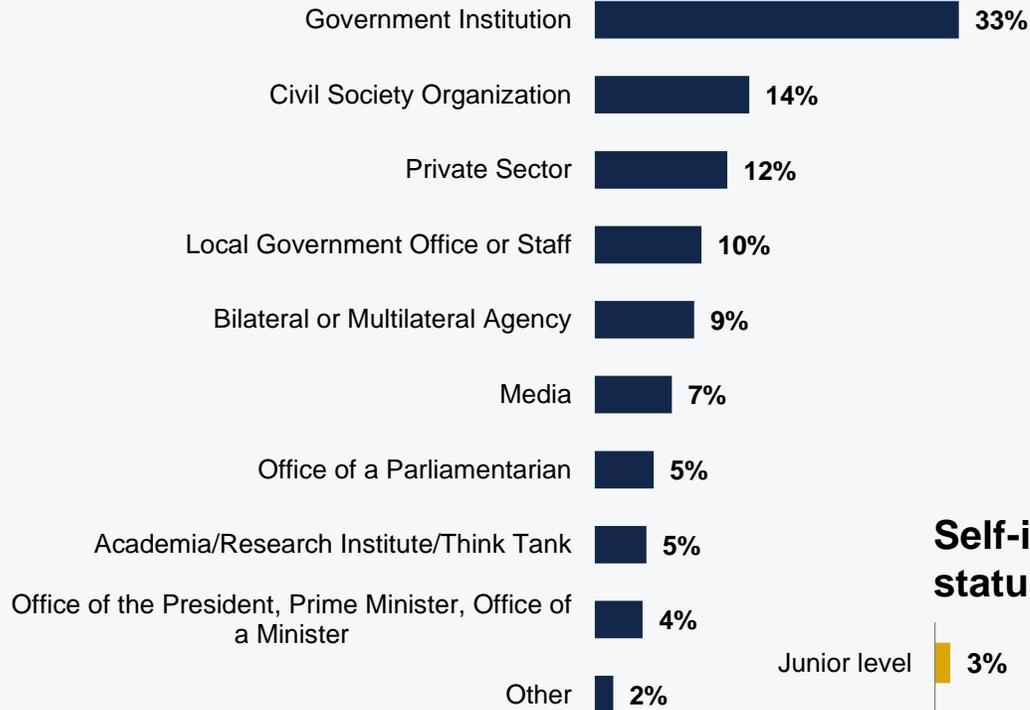


# Sample Demographics

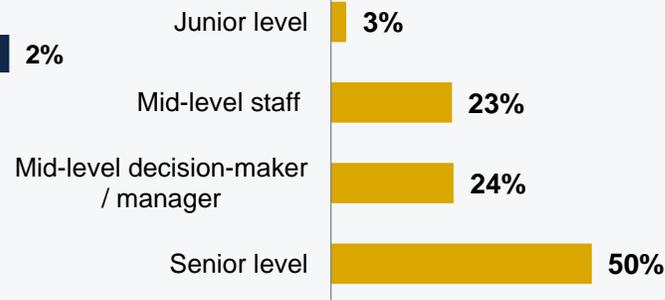
# Respondent Profile: Affiliation, Specialization, Status

## Current Affiliation

% of Respondents

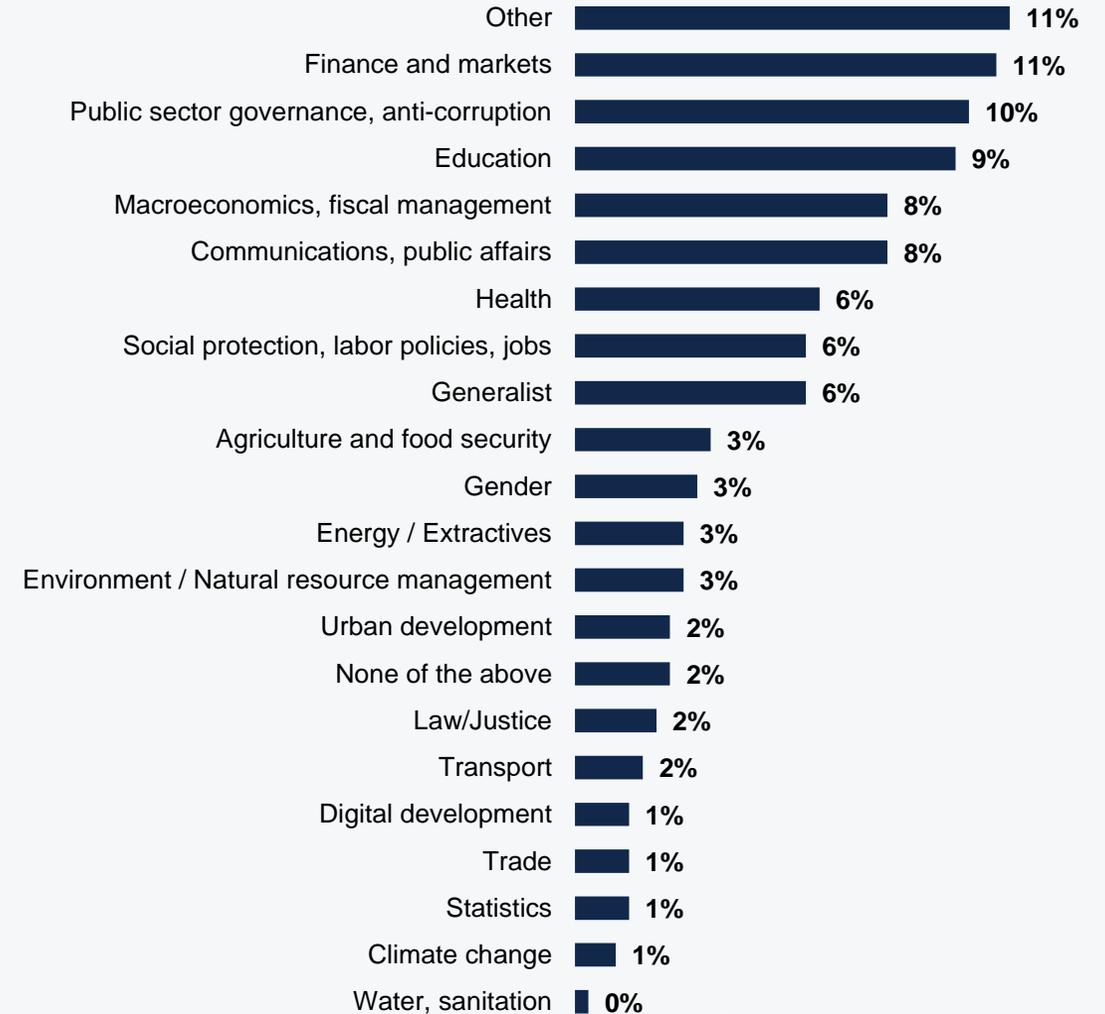


## Self-identified status



## Specialization

% of Respondents

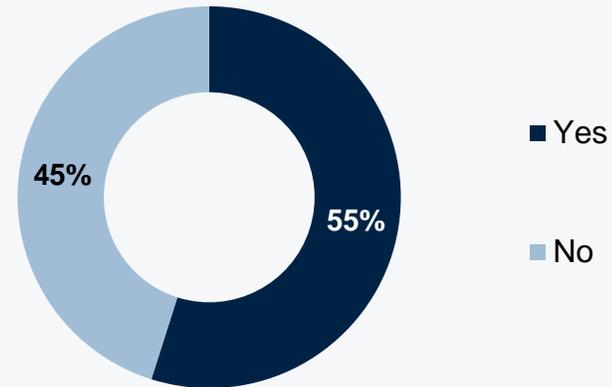


Which of the following best describes your current affiliation? (Select only 1 response) (N=302)  
Please identify the primary specialization of your work. (Select only 1 response) (N=295)

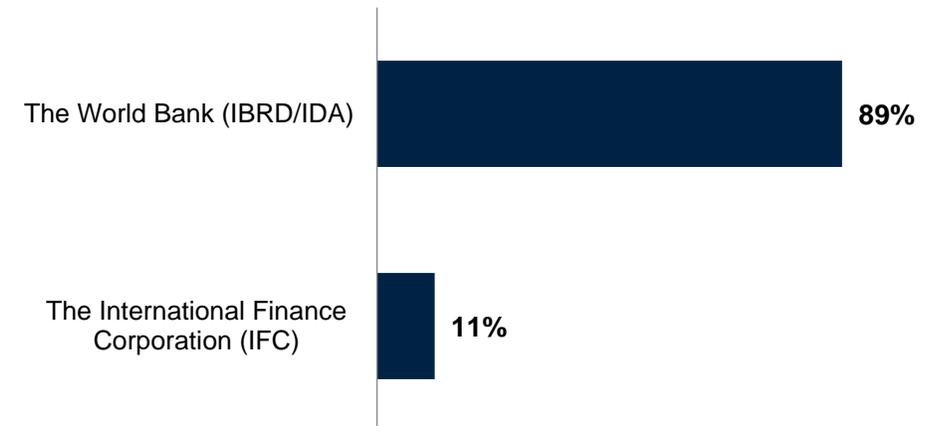


# Respondent Profile: Collaboration with the WBG

## Collaboration with the WBG



## Collaboration Institution

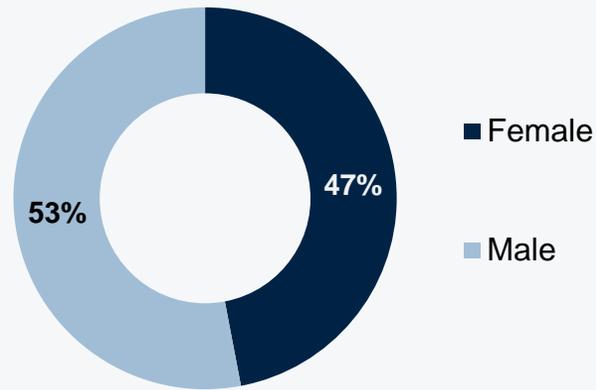


Currently, do you professionally collaborate/work with the World Bank Group (IBRD, IFC, MIGA, ICSID) in your country? (N=296)

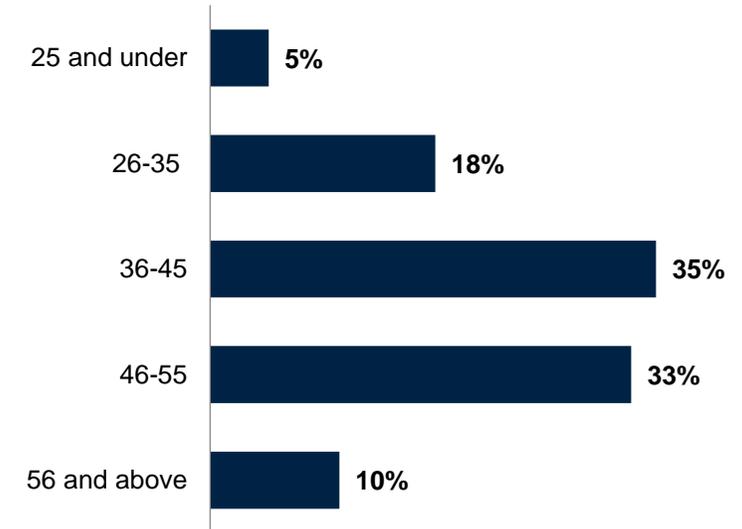
Which of the following agencies of the World Bank Group do you primarily collaborate/work with in Mongolia? (Select only 1 response) (N=151)

# Respondent Profile: Demographics

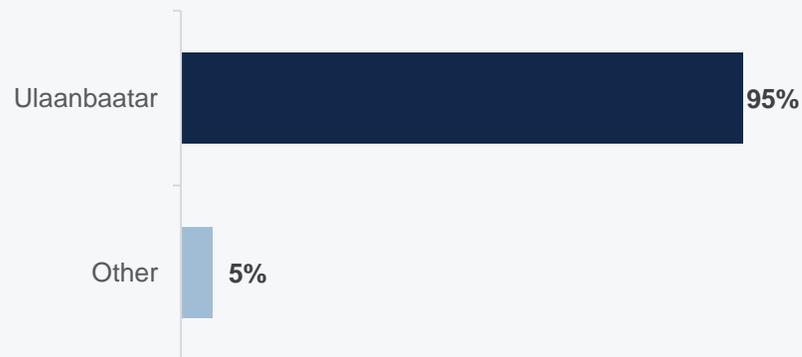
## Gender



## Age



## Location



What's your gender? (N=307)

What's your age? (N=307)

Which best represents your geographic location? (N=304)



# Methodology

# Methodology

**From March to May 2023**, a total of **424** stakeholders of the WBG in Mongolia were invited to provide their opinions about the WBG's work in the country. They did so 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, think tanks; and the media.

**A total of 307 stakeholders participated in the survey (72% response rate).** Respondents completed the questionnaire either through an online platform, or through completing a paper questionnaire, which was delivered to them via mail, email, or during a personal interview.

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 FY20 and FY23

The results of this year's Country Survey were compared to those of the Country Survey conducted in FY20 (with a response rate of 65%, N=269).

Comparing responses across Country Surveys reflects changes in attitudes over time, as well as 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 FY20 and FY23 country surveys are listed in the table on the right.

Percentage of Respondents	FY 2020	FY 2023
Office of the President, Prime Minister, Office of a Minister	5%	4%
Office of a Parliamentarian (The State Great Khural)	7%	5%
Government Institution: Employee of a Ministry / Ministerial Department / Project Implementation Unit / Independent Government Institution (for example, The Bank of Mongolia, Regulatory or Oversight Agency) / Judiciary / State-Owned Enterprise	29%	33%
Local Government Office or Staff	12%	10%
Bilateral or Multilateral Agency (for example, embassy, development organization, development bank, UN agency)	6%	9%
Civil Society Organizations: (Local and Regional NGOs; Community-Based Organizations; Private Foundations; Professional / Trade Associations, Faith-Based Groups, and Youth Groups)	16%	14%
Private Sector: Private Company / Financial Sector Organization / Private Bank	11%	12%
Media	9%	7%
Academia/Research Institute/Think Tank	5%	5%
<b>Total Number of Respondents</b>	<b>267</b>	<b>302</b>

# Statistical Analysis

To classify respondents into different stakeholder groups, their self-reported responses to the question [“Which of the following best describes your current affiliation?”](#) were used. Respondents who selected “Other” or who have not provided an answer to this question (n=10) were included in descriptive statistics, but not in the stakeholder analysis.

Breakdowns for individual questions by stakeholder group can be found in the “Mongolia 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 of the charts.

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

Groups	No.	Percentage
Office of the President / Prime Minister / Minister	13	3%
Office of a Parliamentarian	16	6%
Government Institutions	99	28%
Local Government	29	17%
Bilateral / Multilateral Agency	27	8%
Civil Society Organization	42	11%
Private Sector	36	13%
Academia / Research Institute / Think Tank	14	8%
Media	21	6%
<b>Total</b>	<b>297</b>	<b>100%</b>

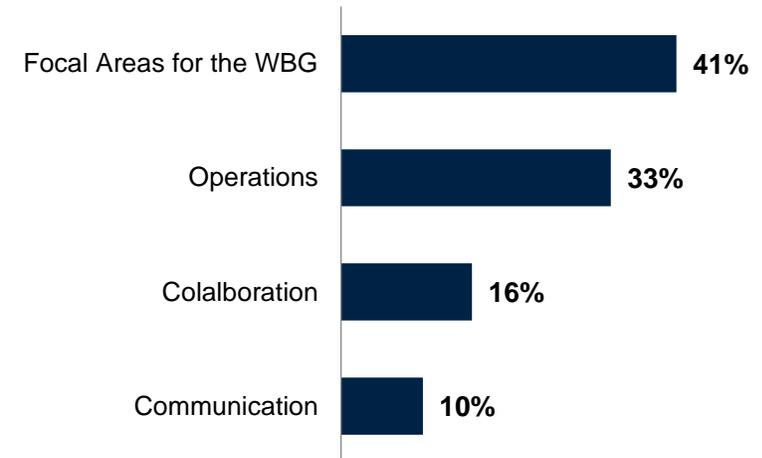
# Qualitative Analysis

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 future effectiveness in Mongolia.

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

A total of 51 responses were received. They varied in length from a few words to a few sentences. The comments were broadly categorized into four groups based on their main theme (please see the figure to the right) and summarized in the relevant section of “The Future Role of the World Bank Group in Mongolia”. 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 Mongolia?

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

**A6.** To what extent does the World Bank Group influence the development agenda in Mongolia? 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 Mongolia, 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 Mongolia, 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 Mongolia (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 Mongolia? I am satisfied with the **quality** of the WBG's advisory services and analytical work in Mongolia. 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 Mongolia? The WBG's advice and recommendations are **tailored** to Mongolia's context. Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

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